

Course Agenda

PeopleSoft 9.2 Functional Tools PeopleTools 8.56-8.57 and PUM 26+ Activity Guides Advanced Query Pivot Grids BI Publisher WorkCenters

Developed for Functional Users, this custom training package has been developed for power functional users with strong technical capabilities. This specially combined agenda will quickly introduce students to new PeopleSoft features. Through scenarios, real-world experiences from implementers, and hands-on activities, students will learn how to leverage existing functional tools to enhance their users' experiences through better reporting and usability improvements.

Prerequisites:

- Basic Understanding of Activity Guides
- Basic Understanding of Query
- Basic Understanding of BI Publisher

Day 1 (am) - Activity Guides

Review of PeopleSoft Activity Guides

- Overview of Activity Guides
- Functional Uses (Where, How, Why)
- Understanding the Activity Guide Components

Templates and Instances

- Activity Guide Types
- Setting up Templates
- Template Security
- Adding Custom Navigation
- Questionnaire

Action Items

- Action Item Overview
- Sequencing
- Action Item Details

Deploying Activity Guides

- Classic vs. Fluid
- Creation of Access Mechanism

Advanced Topics

- Enhancing Activity Guides through PeopleCode
- Pre and Post Processing Overview
- Migrating Data between Databases

Exercise, Tips and Tricks

- Create Basic Activity Guide
- Modify Existing Guide

Day 1 (pm) - Advanced Query

Query Concept Review

- Records, Fields, Criteria
- Inner and Outer Joins
- Running and Scheduling

Expressions

- Defining Expressions
- Defining Aggregate Functions
- Adding Expressions to Fields and Criteria
- Drilling URL's

SubQueries

- Defining Subquery

Connected Query

- Understand Connected Query Uses
- Parent/Child relationships
- Connected Query Manager/Viewer/Scheduler

Pivot Grids

- Overview of Pivot Grids
- Pivot Grid Basics
- Using Pivot Grid Wizard
- Publishing Pivot Grids from Query Data Source
- Publishing Pivot Grid Pagelets

Day 2 - BI Publisher

Overview of PeopleSoft Reporting Tools

- Overview of BI Publisher
- Functional Uses (Where, How, Why)
- Converting from Crystal to BI Publisher

Configuration of BI Publisher

- Global Settings > Defining Properties and Fonts
- Report Manager Settings
- Report Categories
- BI Publisher Integration
- Security > Permission Lists

Create and Registering Data Sources

- Connected Query
- Building a Connected Query and using Descriptive Names
- XML File (SQR, App Engine)

Report Design and Template Creation

- Using RTF or Word DOC Templates
- “How To” Columnar Reports & Bar Charts
- Table Wizards

Report Definition

- Run Locations
- Template Association
- Define Report Output
- Report Properties and Security
- Bursting

Exercise, Tips and Tricks

- AP Checks
- PO Purchase Order
- AR Invoice

Review Feed Publishing Framework

- Publish Query as a Feed to SharePoint
- Overview of Query Access Service

Days 3, 4 - WorkCenters for Functional Admins

Delivered WorkCenter Features

- Pagelet Area
- Target Content Area
- WorkCenter Personalization

Personalization

- Personalize & Configure WorkCenter Task Bar
- Manage Links
- Configure My Work Pagelet and Filter Values
- Add Queries
- Personalize Target Area Content (WorkCenter Dashboard)
- Configure Individual Pagelets

WorkCenter Setup and Configuration for Admins

- WorkCenter Links
- WorkCenter Reports / Processes
- WorkCenter Query Tab

Building a New WorkCenter

- Create a Custom WorkCenter Dashboard
- Creating a Custom WorkCenter

Building and Managing WorkCenter Pagelets

- Overview of Pagelet Configuration Process
- Build Custom Pagelets
- Homepage Pagelets – PeopleSoft Query
- Homepage Pagelets – Pivot Grid
- Create Pagelets Using a Navigation Collection
- Create a Template Pagelet from a Navigation Collection

Adding / Authorizing and Removing Pagelets from WorkCenters

- Add Pagelet to WorkCenter Dashboard
- Add Pagelet to WorkCenter Task Bar

WorkCenter Alerts, Approvals & Notifications