

# **PeopleSoft 9.2 Functional Tools PeopleTools 8.57-8.58 and PUM 30+**

Activity Guides  
Advanced Query  
Pivot Grids  
BI Publisher  
WorkCenters

Developed for PeopleSoft Business Systems Analysts and Techno-Functional Support Professionals, this custom training package incorporates powerful functional tools with recent technical improvements. 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

## 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
- Component Based Service Definition
- Related and Context Data

### 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
- Running Reports in Query Viewer
- Scheduling Reports

## Day 3 - 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
- WorkCenter – My Work 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