

# PeopleTools 8.56-8.58 BI Publisher

## Agenda

Developed for developers, analysts and system admins, PeopleSoft PeopleTools 8.56 BI Publisher training quickly introduces students to the PeopleSoft application reporting leveraging BI Publisher tool. Through scenarios, real-world experiences from implementers, and hands-on activities, students learn how to develop new and modify existing PeopleSoft BI Publisher reports.

## Prerequisites:

- General Knowledge of Relational Database System
- PeopleTools Knowledge

## 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