

# PeopleSoft 9.2 Functional Tools to Configure and Decustomize (PeopleTools 8.58 and PUM 36+)

Activity Guides and WorkCenters

Forms and Approval Builder

Drop Zones and Data Masking

Page and Field Configurator

Related Content and Event Mapping

Advanced Query and BI Publisher

# PeopleSoft 9.2 Functional Tools to Configure and Decustomize

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, configuration, decustomization and usability improvements.

## Prerequisites:

- Basic Understanding of Activity Guides, WorkCenters and Query

## Day 1: Activity Guides

### Portal Technology Overview

- Pagelets
- Homepages
- Dashboards

### 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: WorkCenters and Fluid Tiles

### Delivered 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

### Home Page Management

- Understand Home Pages
- Personalize Home Pages
- Add Home Pages, Tiles
- Understand Home Page Permissions

### Building a New WorkCenter

- Create a Custom WorkCenter Dashboard
- Creating a Custom WorkCenter
- Understand Delivered Nav Collections
- Manage/Modify Nav Collections
- Fluid Tiles

### 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 and Notifications

## Day 2: Forms and Approval Builder

### Forms and Approval Builder Overview

- Understand Forms and Approval Builder
- Security

### Design Forms

- Basic Info and Instructions
  - Form Fields
  - Attachments
  - Publishing
  - Approval Processing
  - Working with Prompts

### Managing Forms

- Activating/Inactivating
- Ownership

### Integration with Applications

- Component Interface Overview
- Form to CI Mapping

### Forms in Fluid

- Form Designer
- My Forms
- Approver/Review

## Day 2: Related Content, Related Actions and Event Mapping

### Related Content Framework (RCF) Overview

- Features
- Extension
- Enhancements since 8.50

### Related Content Frame

- Right-side and Bottom Variant
- Frame States
- Fluid Limitations
- Basic Configuration
- Component Related Content Menu
- Page Field Action Popup Menu
- Custom Action Widget
- Attaching Related Services to Components
- Passing Context to Related Services

### Event Mapping

- Overview
- AppClass Methods
- Related Services
- Component Interface Integration

## Day 3: Drop Zones and Data Masking

### Data Masking

- Installation Options
- Defining Masking Profiles
- Table Based Masking
- Link Masking to Page and Field Configurator

### Drop Zones Overview

- Understand Drop Zones
- Drop Zone Locations
- Classic vs. Fluid

## Day 3: Page and Field Configurator

### Page and Field Configurator Overview

- Understand Page and Field Configurator
- Use Cases

### Page and Field Configurator Setup

- Setup/Modifications
- User Security
- Roles with Exceptions
- Criteria
- Portal Registry

## Day 4: Advanced Query and 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