



# Technical Course

## PeopleSoft PeopleTools 8.54 BI (XML) Publisher

Developed for developers, analysts and system admins, PeopleSoft PeopleTools v8.54 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