

Using the On-Demand Navigator Training Tool

The On-Demand Navigator is used as the primary training and support tool for SAO supported software. This tool allows any user online training at their convenience. All financials modules are represented in the On-Demand Navigator. The On-Demand Navigator's availability is not dependent upon any Production database. The On-Demand Navigator can be used with or without being logged into another database.

This document will discuss how to use the On-Demand Navigator as a training tool for new hire users or current system users that may need to cross-train on a particular database.

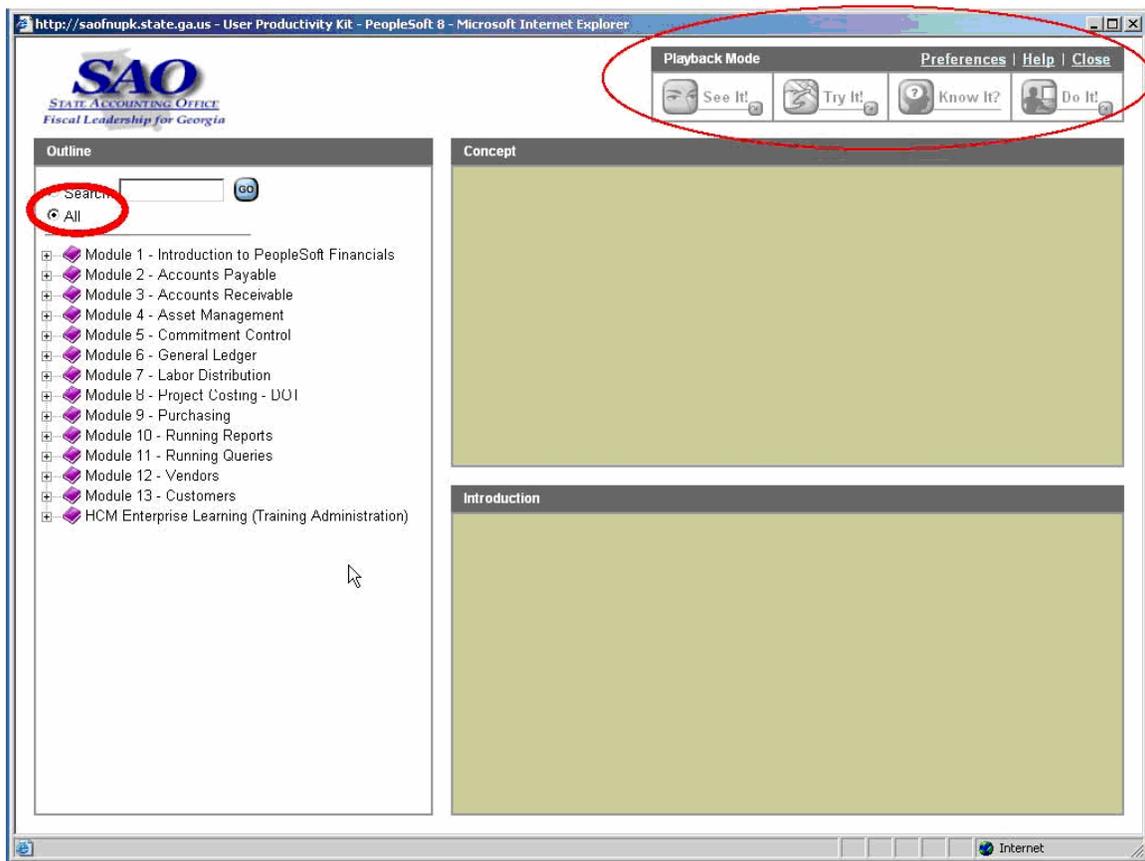
There are three modes to use when viewing topics (exercises) in the On-Demand Navigator. They are:

See It – An automatic simulation that allows learners to view a transaction being performed before they are required to do it. This mode performs like a movie that plays on your desktop.

Try it – Interactive simulation in which users have the ability to practice the transaction prior to performing it in the live application - If they do not perform the correct action, the tool will give them a hint, or they can view the correct action. **(Use this mode for on line instruction).**

Do It – This mode actually “floats” on the live application to display step by step instructions. This provides an in-application support system to guide users through the transaction. (Please note: you must be logged into PeopleSoft financials for this mode to work)

The 'home' page of the On-Demand Navigator training tool is represented in this screenshot:



If your On Demand Navigator 'home' page is blank, click All

Notice that all financials modules are represented. Click on the module title of your choice. You will see high level concepts relating to that module on the right hand side of the page. This concept represents the 'instructor' notes and is very useful information. It is recommended that you read each concept in order to understand the business processes of that particular module.

Note: Playback modes are not available at this level. You must open the topic level in order to actually play back the topic.

This page displays the Module **Concepts** for Accounts Payable

The screenshot shows a web browser window with the URL <http://saofnupk.state.ga.us>. The page title is "User Productivity Kit - PeopleSoft 9 - Microsoft Internet Explorer". The main content area is titled "Accounts Payable Module" and contains the following text:

Accounts Payable Module

The Accounts Payable module is the main source of all payment information for any financial entity. Invoices or expense statements are entered into this subsystem. Additionally, electronic information may be uploaded into the module. These payables are recognized through the creation of a voucher. Once a voucher is created Accounts Payable is utilized to record the payment of these liabilities. There is also much more functionality found within this module. Annual vendor 1099's are issued based on payment information found within Accounts Payable. This module may also be utilized in the reconciliation of the bank accounts.

The following lessons will teach the user about the various functionalities of Accounts Payable. Upon completion a user should be able to successfully create a voucher, process payments, maintain vendor 1099 information, and utilize the module to reconcile bank accounts. Information found within this module is invaluable to an entity's on going operation.

Module Concept:
Click [here](#) for Module Concept.

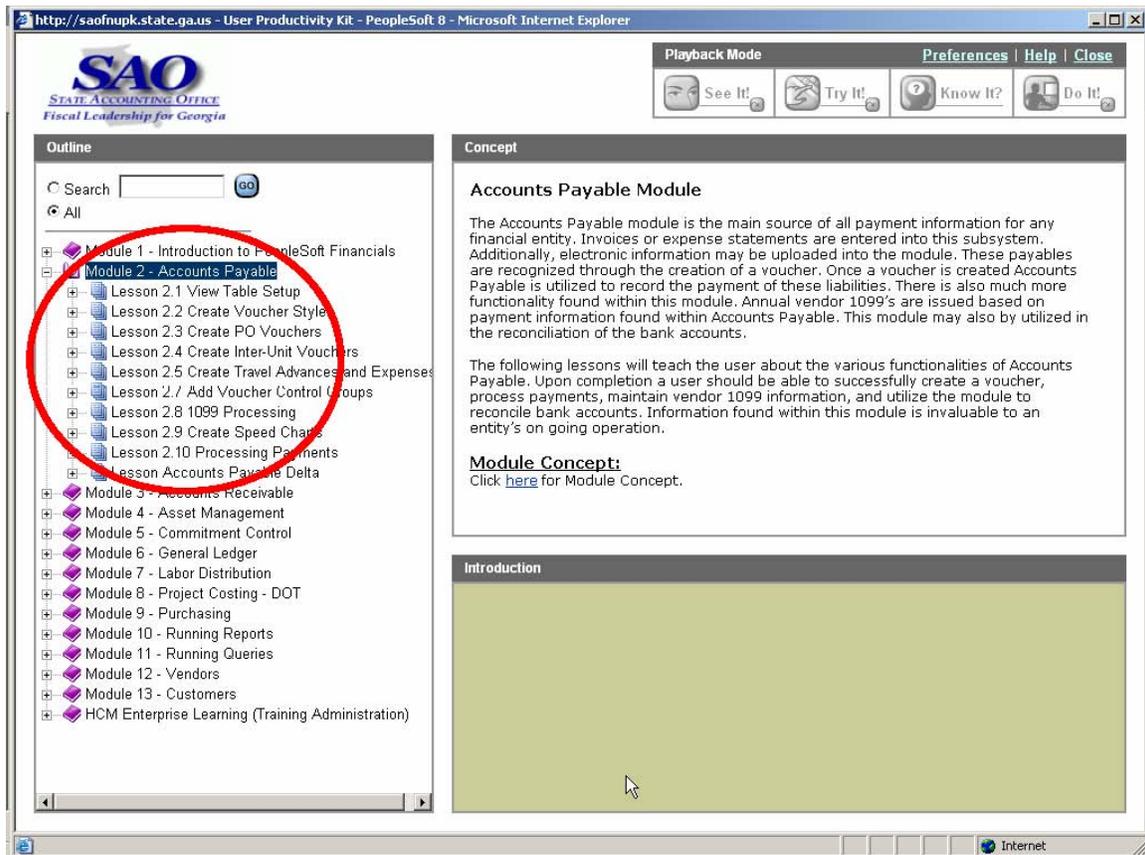
The sidebar on the left is titled "Outline" and contains a search box and a list of modules. The modules are:

- Module 1 - Introduction to PeopleSoft Financials
- Module 2 - Accounts Payable
- Module 3 - Accounts Receivable
- Module 4 - Asset Management
- Module 5 - Commitment Control
- Module 6 - General Ledger
- Module 7 - Labor Distribution
- Module 8 - Project Costing - DUI
- Module 9 - Purchasing
- Module 10 - Running Reports
- Module 11 - Running Queries
- Module 12 - Vendors
- Module 13 - Customers
- HCM Enterprise Learning (Training Administration)

Each module title has a plus sign (+) to its left. A red circle highlights the "Accounts Payable Module" concept area, and a red oval highlights the "Expand and Collapse buttons (+ and -)" in the sidebar.

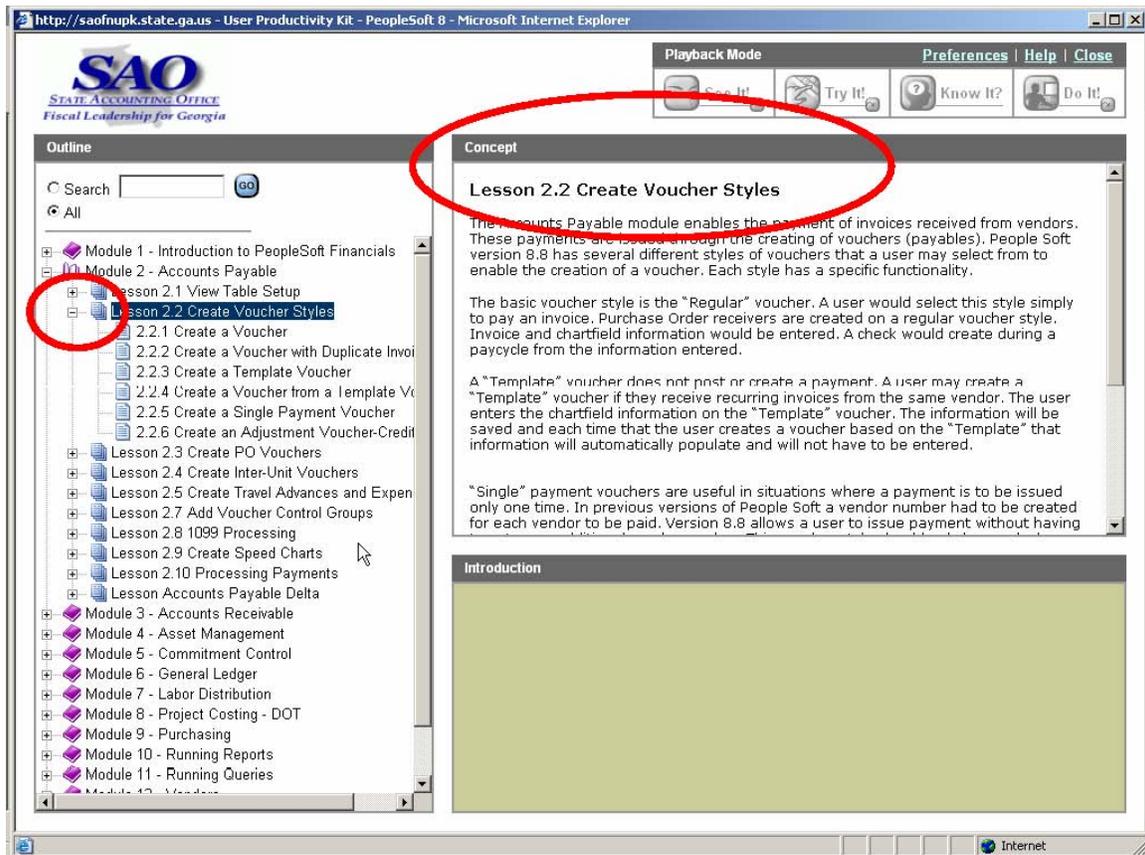
Each module has a plus sign (+) beside the title. In order to expand the view of the module lessons, click the +.

This page displays the expanded Accounts Payable module and the lessons that are available in this module.



In order to view the individual topics/exercises, click the plus sign (+) beside the lesson of your choice. Then click the individual lesson to view the concepts for that lesson.

In this screenshot, the Accounts Payable Module has been expanded and Lesson 2.2 “Create Voucher Styles” has been clicked to reveal the **concepts** for this lesson.



Notice that there is now a minus sign (-) beside the lesson level and the individual topics/exercises are displayed.

In order to view the actual topic/exercise, click the topic/exercise of your choice.

In this screenshot, “Create a Voucher” topic/exercise has been clicked and you are now viewing the **Concepts** for “Create a Voucher”.

The screenshot shows a web browser window with the URL <http://saofnupk.state.ga.us>. The page is titled "2.2.1 Create a Voucher" and is part of a course on "Accounts Payable". The page is divided into several sections:

- Outline:** A sidebar on the left lists the course structure, with "2.2.1 Create a Voucher" selected.
- Concept:** The main content area, which includes:
 - Created:** 03/30/2006
 - Revised:** 04/26/2006
 - Job Aid:** Click [here](#) for Job Aid.
 - Concept:** A section with three bullet points:
 - The Voucher component in PeopleSoft Payables uses deferred processing. If you are adding a new voucher, you can use the fields on the add/search page for the component to populate the new voucher and reduce the amount of prompting and editing you need to do on the new voucher. This page is optional.
 - Regular Voucher style enables users to process standard invoices and invoices associated with a Purchase Order in the PeopleSoft Payables Module. Before adding a voucher, verify that the Vendor and Address currently exist in the Statewide Vendor file.
 - There are only three pages required for adding a voucher: the Invoice Information, Payments, and the Voucher Attribute page. The Voucher Attribute page is used to verify agency defaults.
 - Business Process:** Click [here](#) for Business Process.
- Introduction:** A section with a "Scenario" that reads: "You have received an invoice from John Deere for supplies. You need to create a **Regular Voucher** for this invoice. You should put the **Payment on Hold** to prevent the check from creating. The vendor currently exists in the Statewide vendor file. Use vendor number 0000008285."

The **Introduction** pane (lower right side of window) contains the topic/exercise scenario. The scenario will explain the goal of the exercise.

“Create a Voucher” page (cont)

The screenshot shows a web browser window displaying the 'Create a Voucher' page. The browser address bar shows 'http://saofnupk.state.ga.us - User Productivity Kit - PeopleSoft 8 - Microsoft Internet Explorer'. The page header includes the 'SAO STATE ACCOUNTING OFFICE' logo and the tagline 'Fiscal Leadership for Georgia'. The main content area is titled '2.2.1 Create a Voucher' and includes the following information:

- Created:** 03/30/2006
- Revised:** 04/26/2006
- Job Aid:** Click [here](#) for Job Aid.
- Concept:**
 - The voucher component in PeopleSoft Payables uses deferred processing. If you are adding a new voucher, you can use the fields on the add/search page for the component to populate the new voucher and reduce the amount of prompting and editing you need to do on the new voucher. This page is optional.
 - Regular Voucher style enables users to process standard invoices and invoices associated with a Purchase Order in the PeopleSoft Payables Module. Before adding a voucher, verify that the Vendor and Address currently exist in the Statewide Vendor file.
 - There are only three pages required for adding a voucher: the Invoice Information, Payments, and the Voucher Attribute page. The Voucher Attribute page is used to verify agency defaults.
 - On the Payments page under Payment Options select Hold Payment and Hold Reason, this will prevent the system from processing a payment for this voucher.
 - Once the voucher is saved two new pages will exist, Summary and Error Summary page.
- Business Process:** Click [here](#) for Business Process.
- Introduction:**
 - Scenario:** You have received an invoice from John Deere for supplies. You need to create a **Regular Voucher** for this invoice. You should put the **Payment on Hold** to prevent the check from creating. The vendor currently exists in the Statewide vendor file. Use vendor number 0000008285.

Notice that the **Playback Modes** are now active, **See It, Try it, and Do it** (you must be at the topic/exercise level for the Playback Modes to be available). The Know It mode is not active at this time.

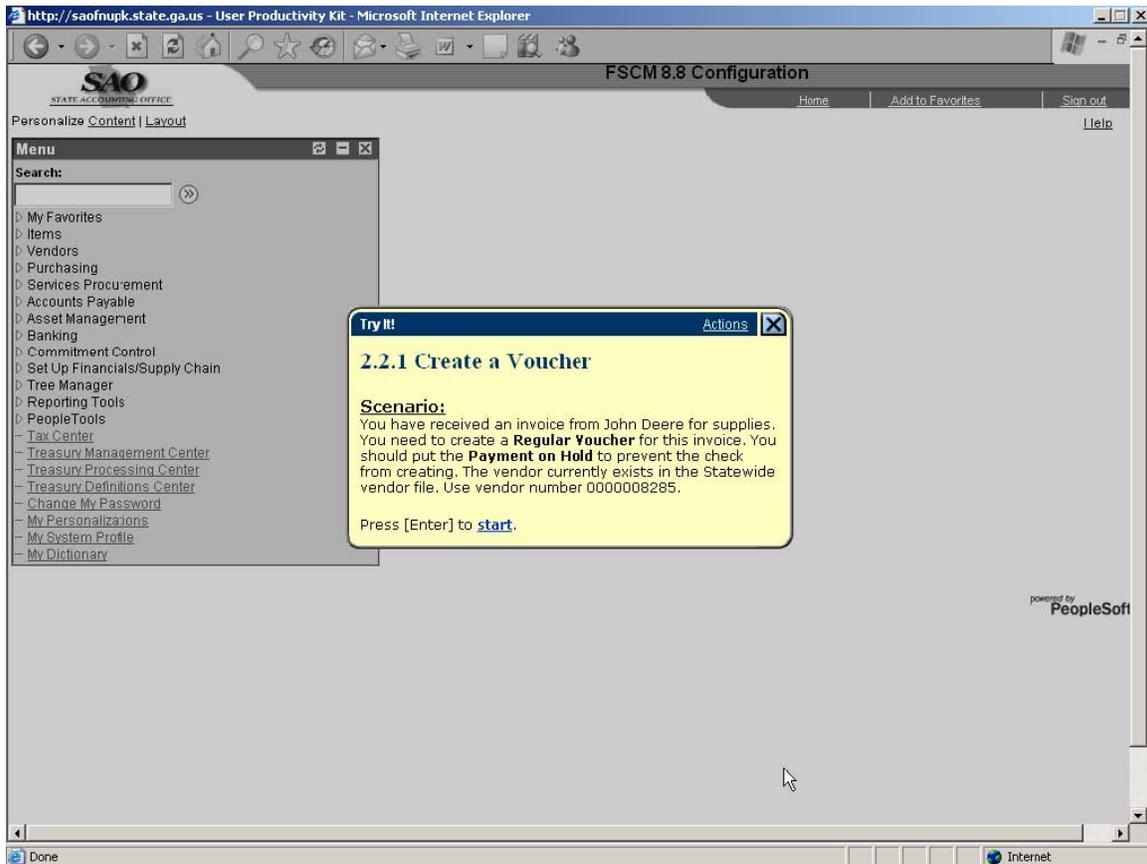
Job Aid – Every topic in the On-Demand Navigator will contain a Job Aid. The Job Aid consists of step by step instruction for the specified topic but will contain no screenshots of pages.

Business Process – Every topic in the On-Demand Navigator will contain a Business Process. The Business Process consists of step by step instructions for the specified topic and will contain screenshots of the PeopleSoft pages.

Once you understand how the On-Demand Navigator works, you are now ready to view a topic/exercise. For **first time users**, you may want to click “**See It**” and watch how the process works. Or if you want to be interactive, click the “**Try It**” mode.

Note on See It Mode: Each bubble within the topic using See It mode will have a **Pause** link. This link will allow you to *Pause* the playback action. When you select the **Pause** link, the player will stop and you will see a **Resume** link. In order to restart the playback, you will need to click the **Resume** link.

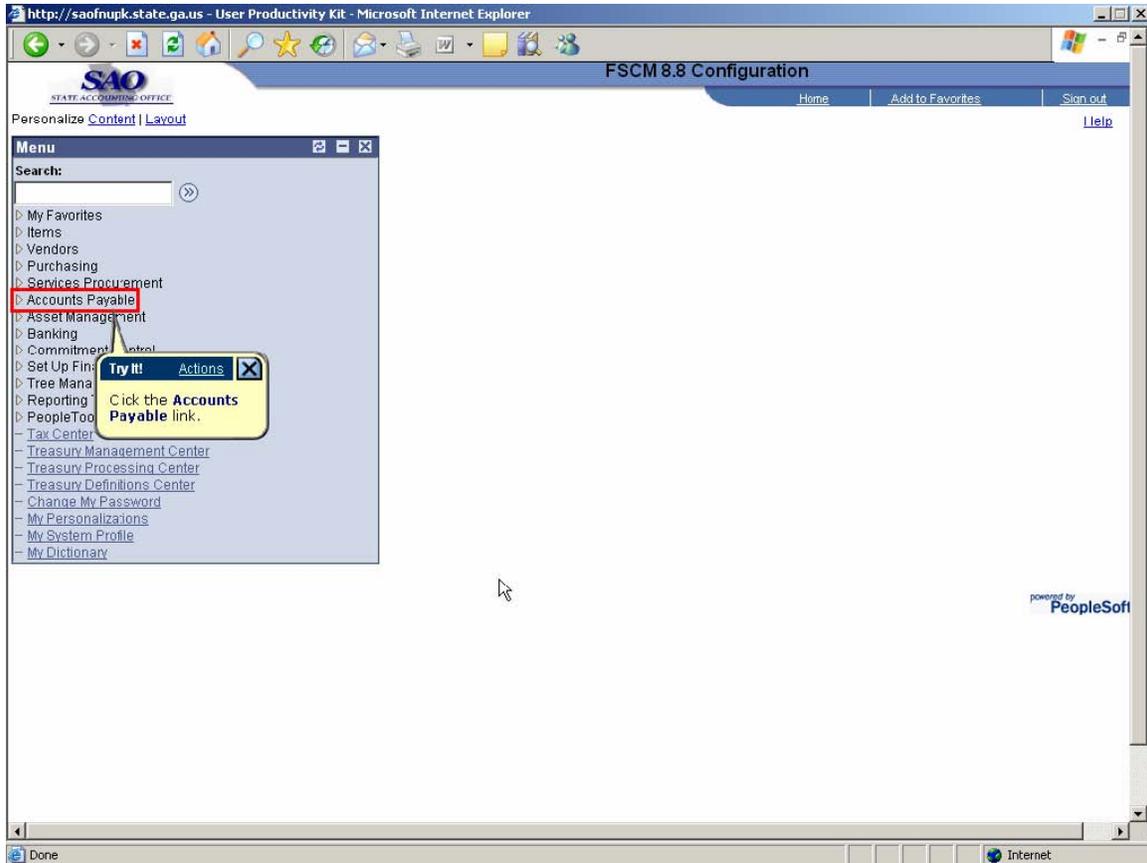
In this view, the Try It! Mode was clicked at the topic/exercise level and you are now viewing the first action/page in this topic. You would press Enter to begin the simulation.



Note: The On-Demand Navigator player Try It mode will allow interactive entry by the user. In most every topic/exercise, you will be asked to enter certain strings of data. In order to make it convenient for the user, we have programmed the On-Demand Navigator to accept the first three letters or characters of any string input of information.

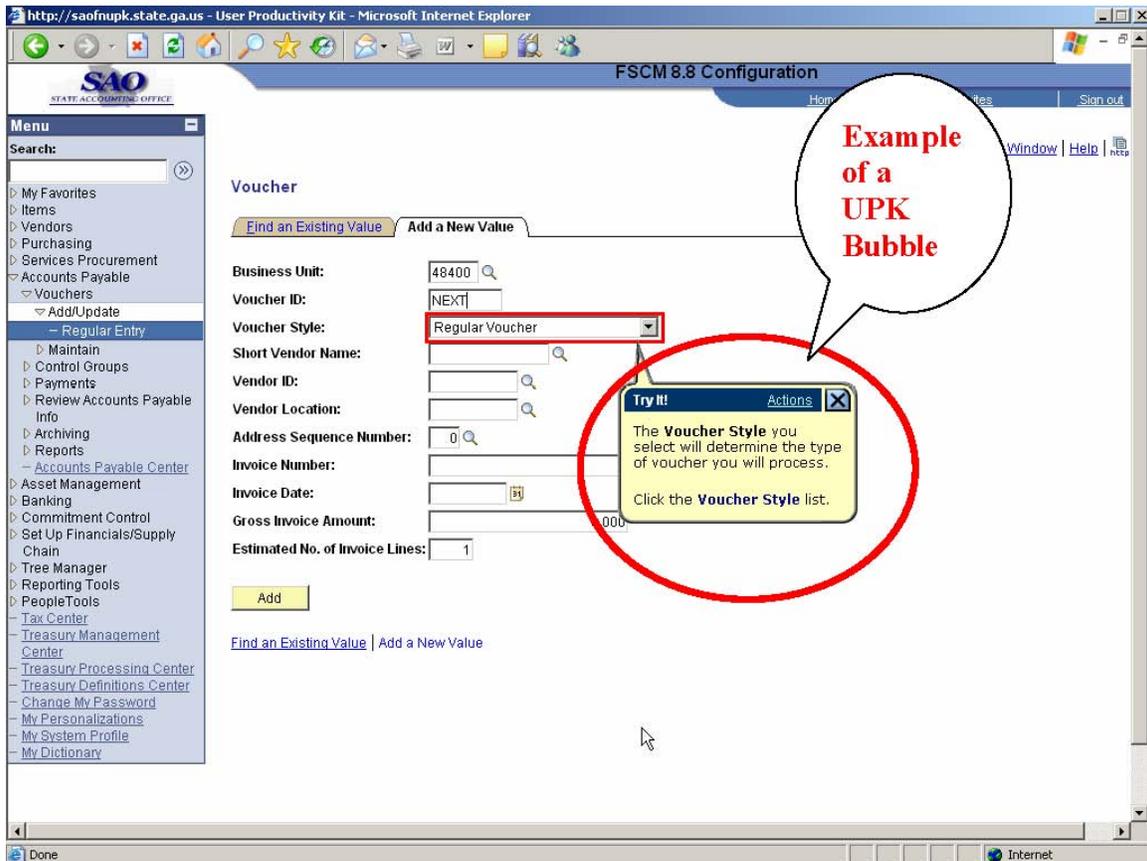
This will not be the case in the actual database. You will have to enter your data in its entirety.

This page represents the second page of the On-Demand Navigator lesson on “Create a Voucher”

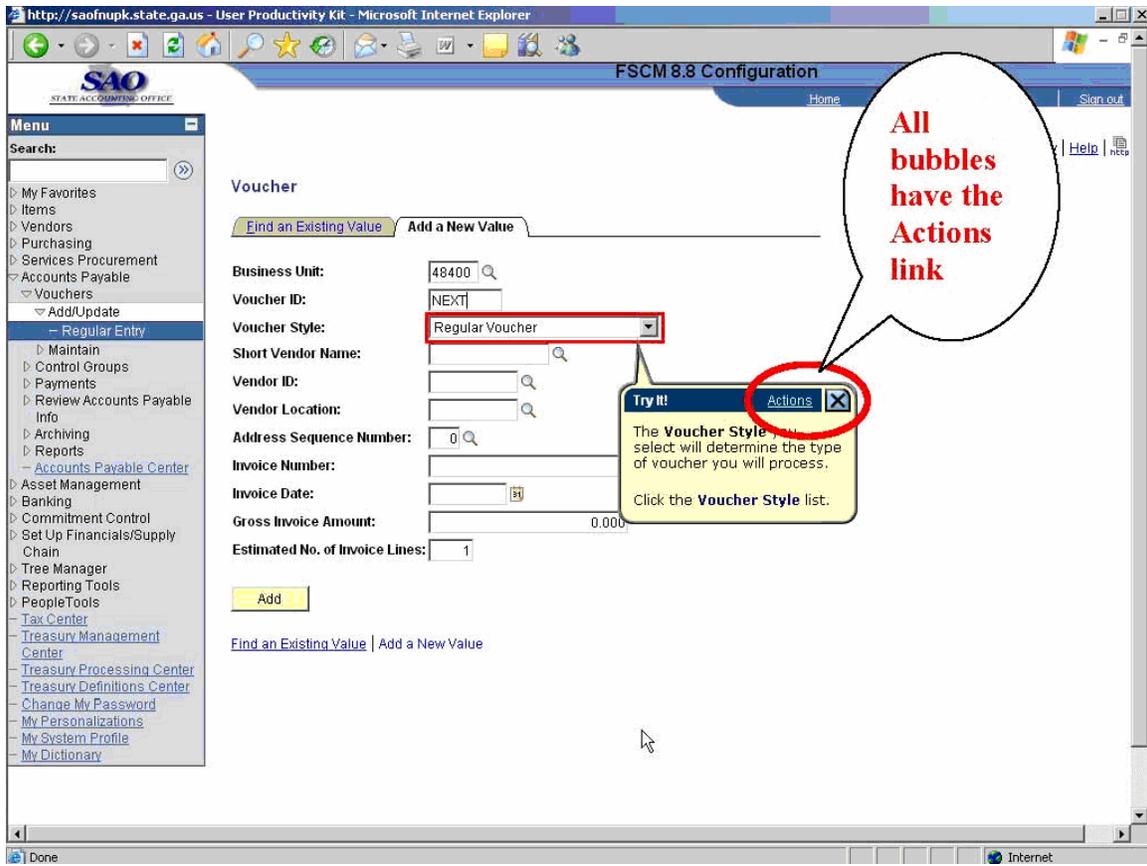


The first few pages of the each On-Demand Navigator lesson will contain navigation paths. In this instance, you are to click the **Accounts Payable** link (Try it mode).

This page represents a typical page of any topic/exercise in the On-Demand Navigator



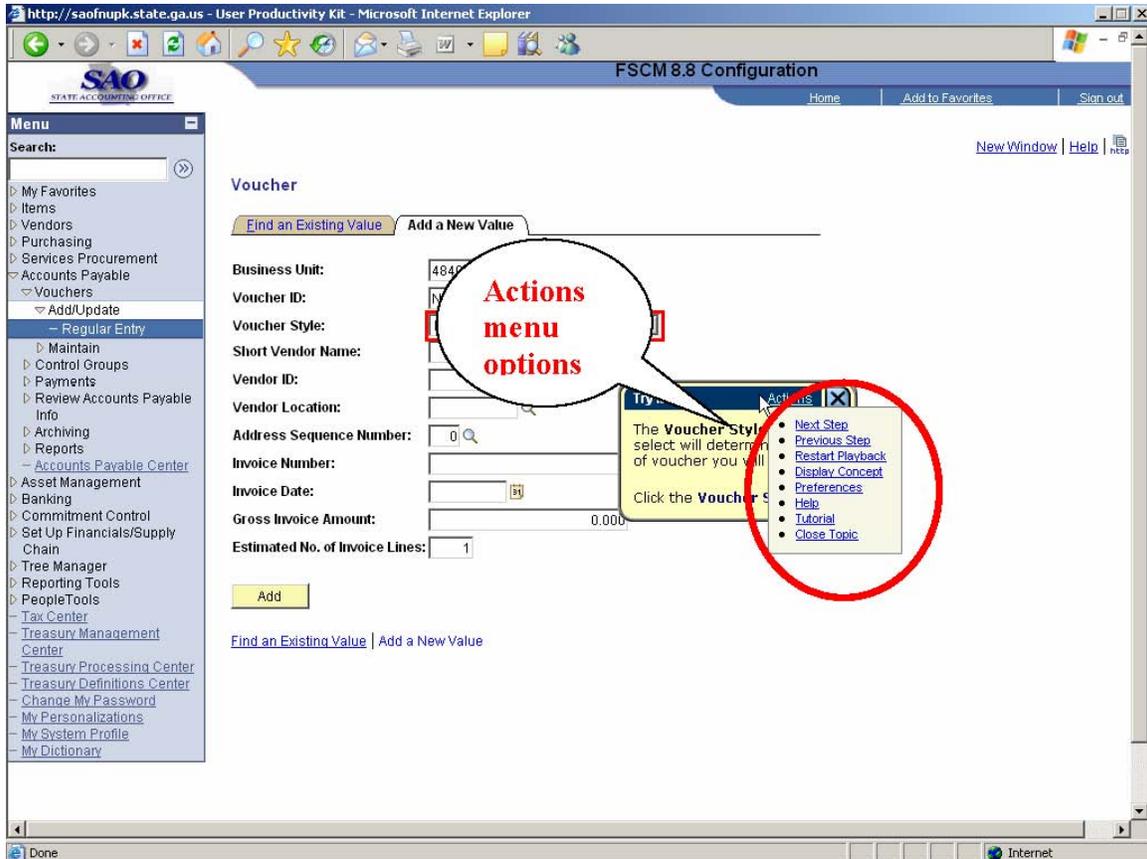
The **On-Demand Navigator topic/exercise bubble** will contain user instructions. These bubbles will tell you where to click or exactly what action to take (Try it mode). Depending on which play back mode you have selected, the On-Demand Navigator bubbles may or may not contain helpful data.



A few notes on how to navigate within the On-Demand Navigator topic:

Within each bubble (Try it mode), you will see not only Instructor notes but also the system action that you are to perform. Each bubble also contains an “**Actions**” link. This link will allow you to perform certain functions within the On-Demand Navigator topic.

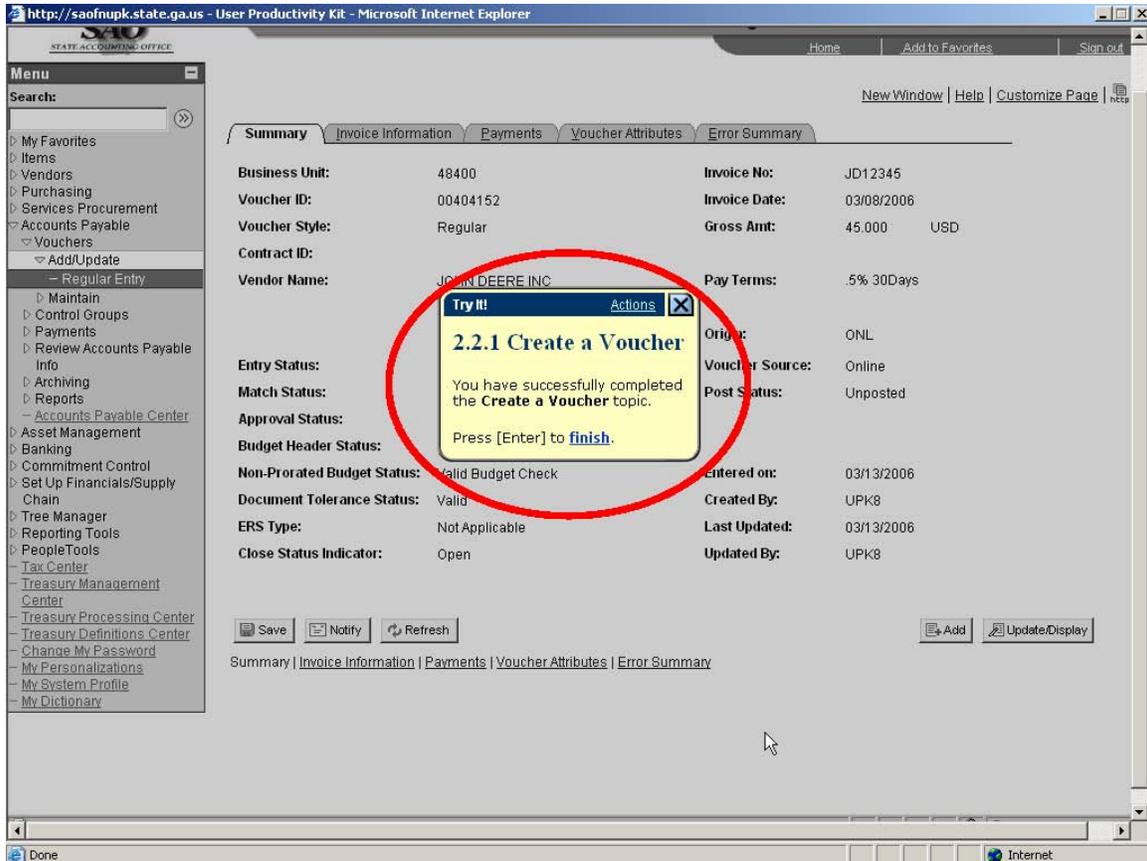
In this view, the **Actions** link within the bubble has been clicked



The **Actions** menu options include:

- 🕒 **Next Step** – Displays the next step in the process
- 🕒 **Previous Step** – Displays the previous step in the process
- 🕒 **Restart Playback**- This action will restart the topic from the beginning
- 🕒 **Display Concept** – Concept of currently displayed topic will appear in a new window
- 🕒 **Preferences** – Preferences of this topic have been set and should not be changed
- 🕒 **Help** – The Help link instructs the On-Demand Navigator user on player software usage
- 🕒 **Tutorial** – This link opens a new window which contains an online tutorial of how to use the On-Demand Navigator in Try it mode
- 🕒 **Close Topic** – This action will close the player topic

When you have finished an On-Demand Navigator topic, you will see a screen similar to this one



At the end of each topic, you will see a bubble with a message “**You have successfully completed the topic**”. You will press Enter to finish the current topic.

The On-Demand Navigator will return you to the home page where you may select another topic.