



SAO

State Accounting Office

Taking TeamWorks Online Training

Supported by SAO

What is TeamWorks Online Training

Formerly known as the User Productivity Kit or UPK, TeamWorks Online Training is the State Accounting Office browser-based, on-demand training tool that allows users to learn how to use the TeamWorks application at their workstation, working at their own pace, and at a time that fits in their work schedule.



Objectives

At the end of this presentation users should be able to:

- Navigate to the TeamWorks Online Training homepage
- Navigate the TeamWorks Online Training content page
- Describe the TeamWorks Online Training playback modes
- Select and play a topic
- Navigate a TeamWorks Online Training simulation



Navigating to TeamWorks Online Training

TeamWorks Online Training is located on the SAO Website.



To access the Training page, click the **Training & Calendars** link on the SAO homepage.



The screenshot shows the SAO website homepage. At the top, there is a navigation bar with the SAO logo and the text "State Accounting Office". To the right of the logo is a search bar with the text "Search within this site" and a magnifying glass icon. Below the navigation bar is a horizontal menu with several links: "TeamWorks", "Statewide Reporting", "Shared Services", "Policies and Procedures", "Travel", and "Training & Calendars". The "Training & Calendars" link is highlighted with a red border. Below the menu is a large blue banner with the text "SAO Customer Service Center Menu" and "The State Accounting Office Customer Service Center is open Monday - Friday 8:00 A.M. - 5:00 P.M.". Below this text is a yellow "READ MORE" button with a right-pointing arrow. To the right of the banner is a graphic with the words "CUSTOMER SUPPORT" in large red letters, surrounded by other words like "ASSISTANCE", "FAQ", "SERVICE", "ADVICE", "CONSULTANT", "HELP", "REQUIREMENTS", "CAREER", "CLIENT", "PROBLEM", "QUESTION", "SOLUTION", and "SUPPORT". Below the banner is a row of three blue boxes: "Travel" with the link "Statewide Travel Policy", "News Releases" with the link "New Statewide PO Policy, effective May 1st, 2014", and "How do I?" with the link "Contact The SAO Customer Service Center (CSC)".

Navigating to TeamWorks Online Training



The screenshot shows the State Accounting Office website. The top navigation bar includes links for TeamWorks, Statewide Reporting, Shared Services, Policies and Procedures, Travel, and Training & Calendars. The Training & Calendars section is expanded, showing a list of training options. The 'TeamWorks Training' link is highlighted with a red box. The main content area displays the 'Training & Calendars' page, which includes a search bar and a 'Stay Connected' section.

Home » Training & Calendars

Training & Calendars

SAO provides a variety of online training, job aids and other resources to support systems and financial reporting. Select from the left nav bar to select the training that meets your needs.

Stay Connected

- Accounting Training and CPE Links
- Salary and Travel Job Aids
- State Accounting Office Calendars
- ▶ TeamWorks Training**
- TeamWorks Travel and Expense Training
- ▶ Year-End Reporting Training

To take TeamWorks Online training, click the **TeamWorks Training** link.

Navigating to TeamWorks Online Training

Click the **TeamWorks Financials Online Training** link.

Click the button below to access the SAO **TeamWorks Online Training** page.

[SAO TeamWorks Online Training](#)



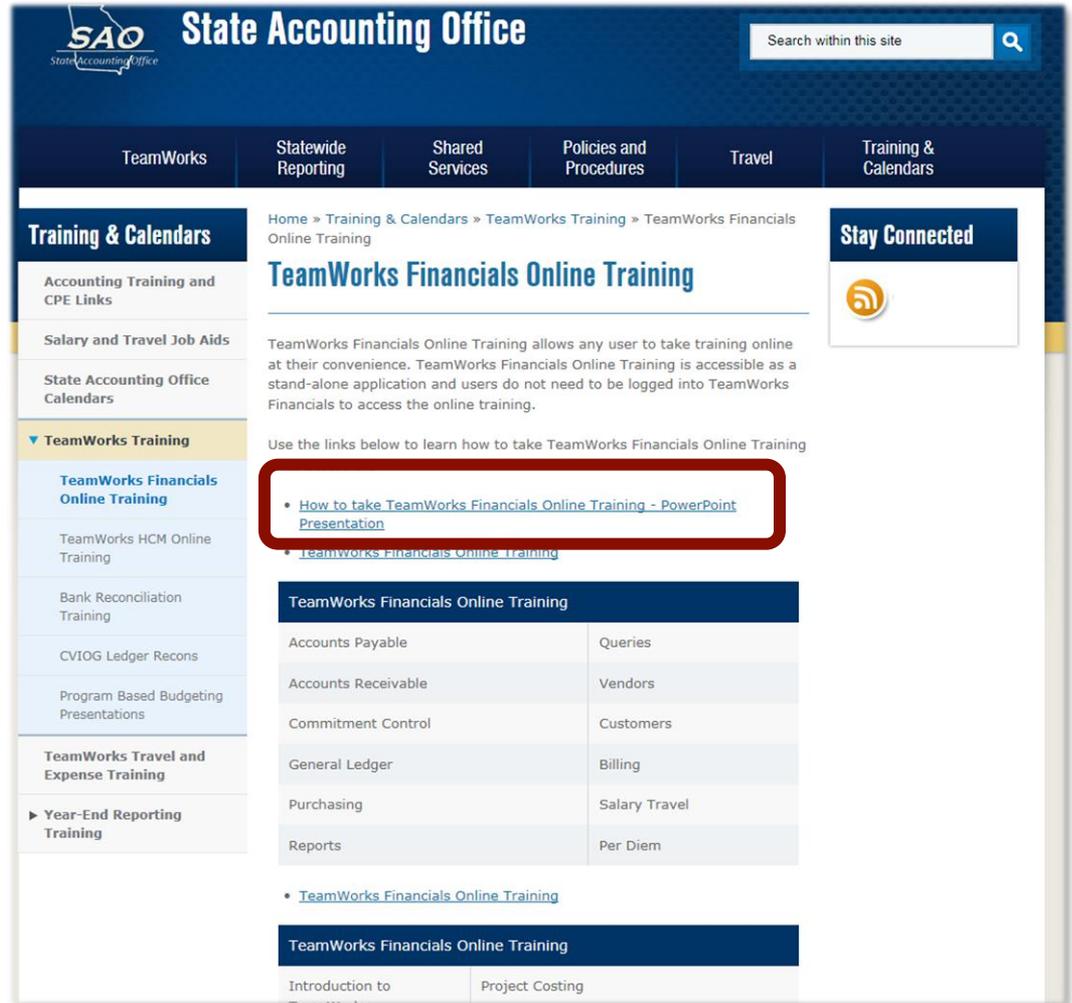
Don't forget to save it as a Favorite!



The screenshot shows the SAO website interface. At the top, there is a navigation bar with the SAO logo and the text "State Accounting Office". To the right of the logo is a search box labeled "Search within this site". Below the navigation bar is a horizontal menu with the following items: "TeamWorks", "Statewide Reporting", "Shared Services", "Policies and Procedures", "Travel", and "Training & Calendars". The "Training & Calendars" menu item is highlighted. Below this menu is a sidebar titled "Training & Calendars" with a list of links: "Accounting Training and CPE Links", "Salary and Travel Job Aids", "State Accounting Office Calendars", "TeamWorks Training" (which is expanded to show a list of training links), "TeamWorks HCM Online Training", "Bank Reconciliation Training", "CVIOG Ledger Recons", and "Program Based Budgeting". The "TeamWorks Training" link in the sidebar is highlighted with a red box. The main content area shows the breadcrumb "Home » Training & Calendars » TeamWorks Training" and the heading "TeamWorks Training". Below the heading is a paragraph of text: "Training resources on this page pertain to the TeamWorks HCM , Financials Applications and TeamWorks Travel & Expense. All TeamWorks Training is accessible independently, and users do not need to be logged into TeamWorks." Below this text is a list of links: "TeamWorks Financials Online Training", "TeamWorks HCM Online Training", "Bank Reconciliation Training", "Carl Vinson Institute of Government Ledger Recons", "Program Based Budgeting Presentations", and "TeamWorks Travel & Expense Training". To the right of the main content area is a "Stay Connected" section with an RSS feed icon.

Accessing TeamWorks Online Training

On the **TeamWorks Financials Online Training** page you can review this presentation by clicking the **How to take TeamWorks Financials Online Training – PowerPoint Presentation** link.



State Accounting Office

Search within this site

TeamWorks | Statewide Reporting | Shared Services | Policies and Procedures | Travel | Training & Calendars

Home » Training & Calendars » TeamWorks Training » TeamWorks Financials Online Training

TeamWorks Financials Online Training

TeamWorks Financials Online Training allows any user to take training online at their convenience. TeamWorks Financials Online Training is accessible as a stand-alone application and users do not need to be logged into TeamWorks Financials to access the online training.

Use the links below to learn how to take TeamWorks Financials Online Training

- [How to take TeamWorks Financials Online Training - PowerPoint Presentation](#)
- [TeamWorks Financials Online Training](#)

TeamWorks Financials Online Training	
Accounts Payable	Queries
Accounts Receivable	Vendors
Commitment Control	Customers
General Ledger	Billing
Purchasing	Salary Travel
Reports	Per Diem

- [TeamWorks Financials Online Training](#)

TeamWorks Financials Online Training

Introduction to TeamWorks	Project Costing
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TeamWorks Online Training Technical Requirements

Before accessing TeamWorks Online Training verify the workstation browser.

Verify that the workstation has Internet Explorer version 6 or higher installed:

1. Open Internet Explorer
2. Click Help
3. Click About Internet Explorer

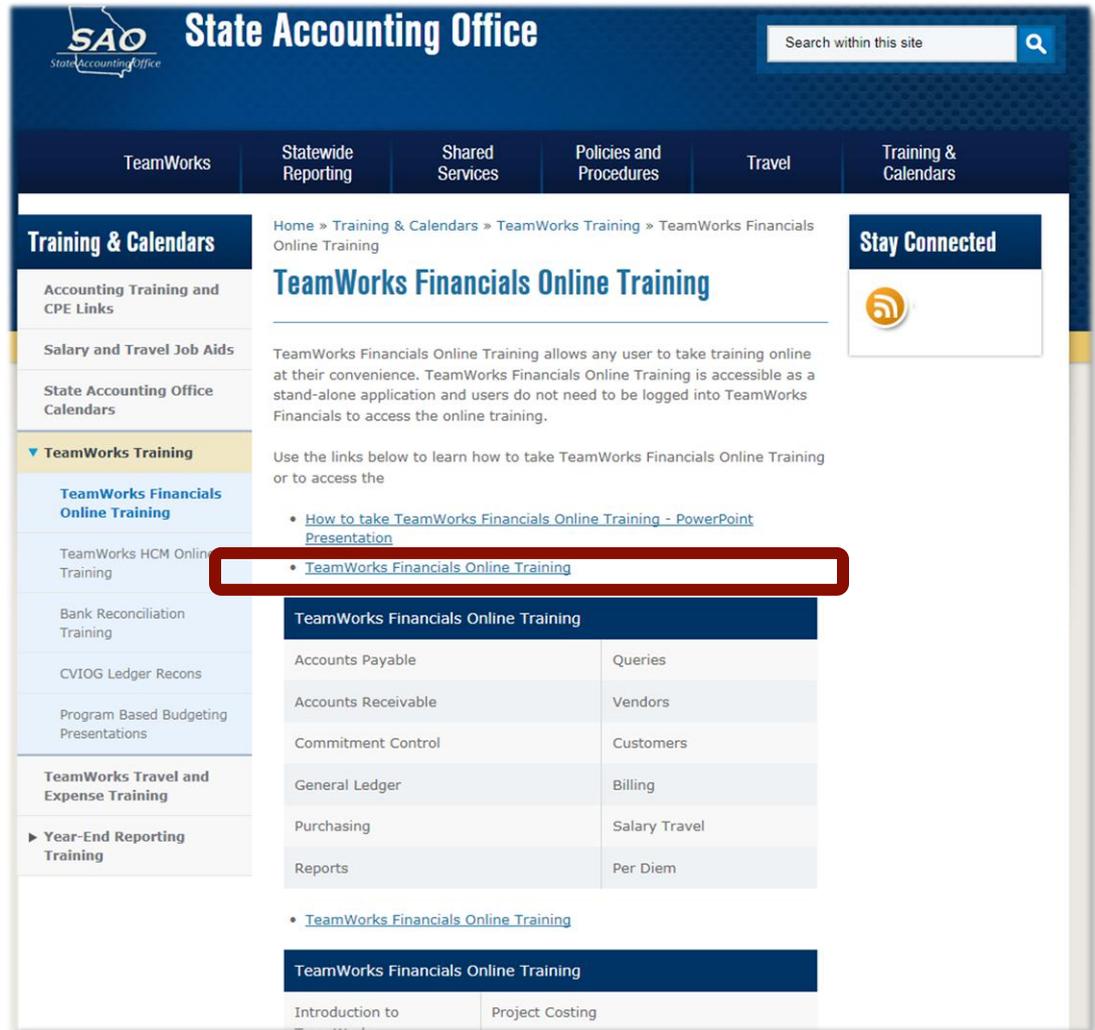


TeamWorks Online Training works best in Internet Explorer and is not compatible with Google Chrome.

Accessing TeamWorks Online Training

Click the first **TeamWorks Financials Online Training** link to access training modules for:

- Accounts Payable
- Accounts Receivables
- Commitment Control
- General Ledger
- Purchasing
- Reports
- Queries
- Vendors
- Customers
- Billing
- Salary Travel
- Per diem



State Accounting Office

Search within this site

TeamWorks | Statewide Reporting | Shared Services | Policies and Procedures | Travel | Training & Calendars

Home » Training & Calendars » TeamWorks Training » TeamWorks Financials Online Training

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TeamWorks Financials Online Training

Accounts Payable	Queries
Accounts Receivable	Vendors
Commitment Control	Customers
General Ledger	Billing
Purchasing	Salary Travel
Reports	Per Diem

• [TeamWorks Financials Online Training](#)

TeamWorks Financials Online Training

Introduction to TeamWorks	Project Costing
---------------------------	-----------------

Accessing TeamWorks Online Training

Click the second **TeamWorks Financials Online Training** link to access training modules for:

- Introduction to Teamworks
- Labor Distribution
- Asset Management
- Project Costing
- Project Costing Integration with Asset Management

Home » Training & Calendars » TeamWorks Training » TeamWorks Financials Online Training

TeamWorks Financials Online Training

TeamWorks Financials Online Training allows any user to take training online at their convenience. TeamWorks Financials Online Training is accessible as a stand-alone application and users do not need to be logged into TeamWorks Financials to access the online training.

Use the links below to learn how to take TeamWorks Financials Online Training or to access the

- [How to take TeamWorks Financials Online Training - PowerPoint Presentation](#)
- [TeamWorks Financials Online Training](#)

Stay Connected



TeamWorks Financials Online Training	
Accounts Payable	Queries
Accounts Receivable	Vendors
Commitment Control	Customers
General Ledger	Billing
Purchasing	Salary Travel
Reports	Per Diem

- [TeamWorks Financials Online Training](#)

TeamWorks Financials Online Training	
Introduction to TeamWorks	Project Costing
Labor Distribution	Project Costing Integration with Asset Management
Asset Management	

The Training Content Homepage

IE Browser

The screenshot shows a Windows Internet Explorer browser window. The title bar reads "UPK - Employee Self-Service - Windows Internet Explorer". The address bar contains "http://localhost:1421/toc0.html". The browser's link bar shows "Welcome to TeamWorks", "georgia.gov - Training", and "Covendis - Login". The page content includes a search bar, a navigation pane with "Using Employee Self-Service", and a main content area titled "Using Employee Self-Service" with a list of tasks.

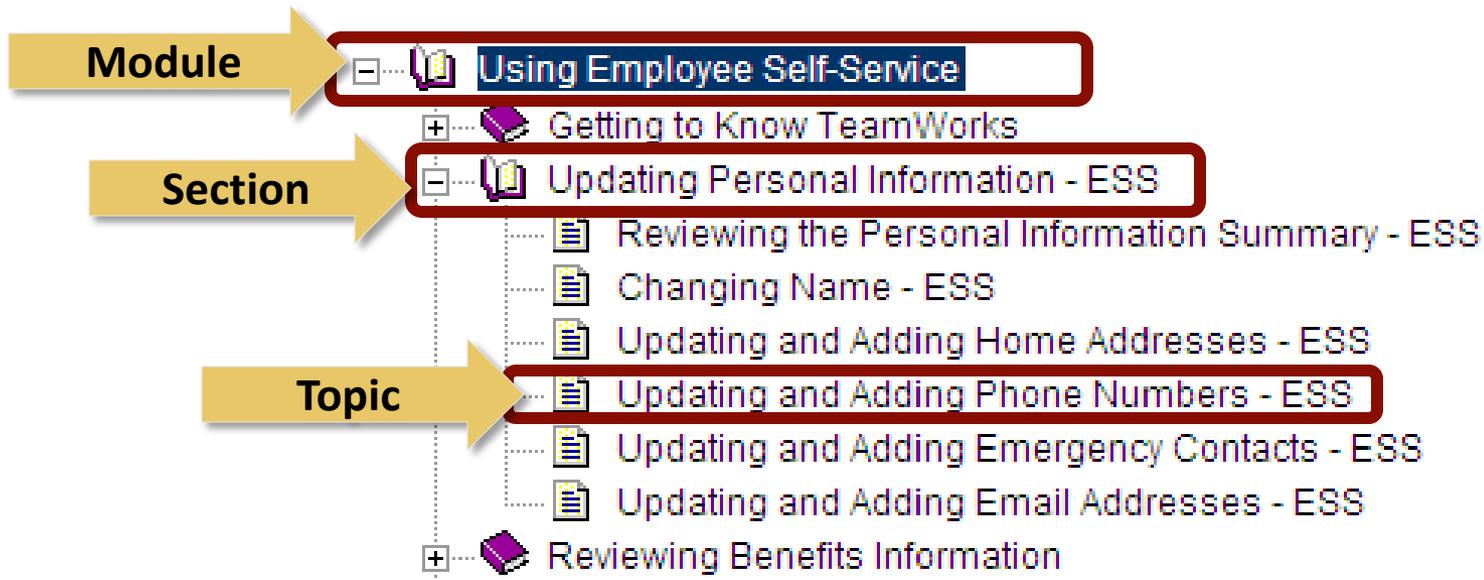
Content Outline

Concept Pane

The next few slides focus on the Content Outline.

The Content Outline

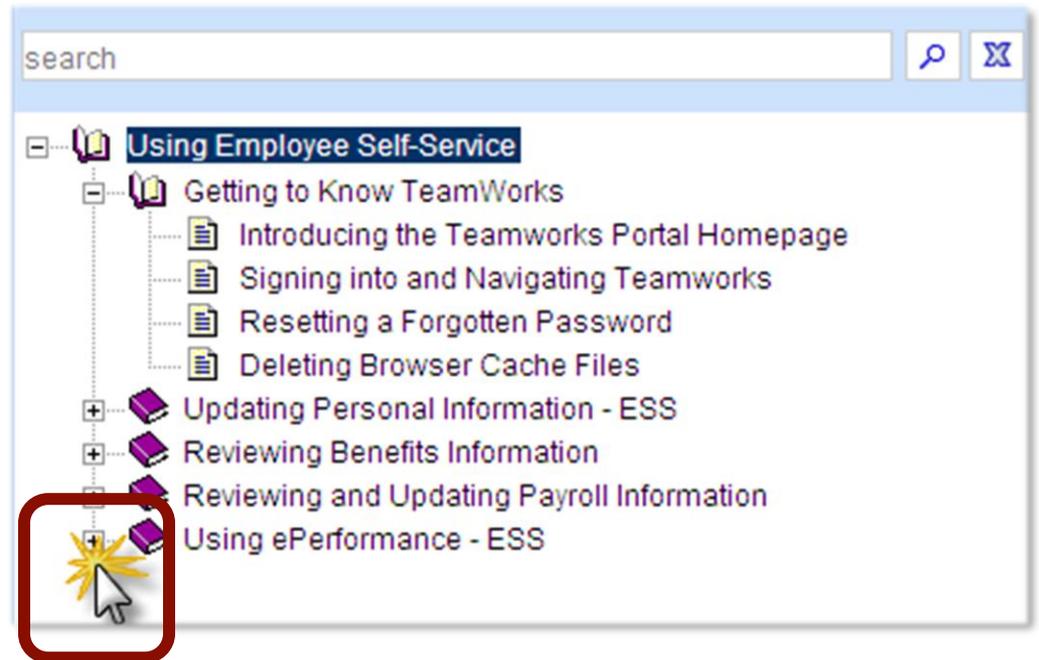
The TeamWorks Online Training player is organized into a folder hierarchy. The course outlines are structured as shown below:



The Content Outline

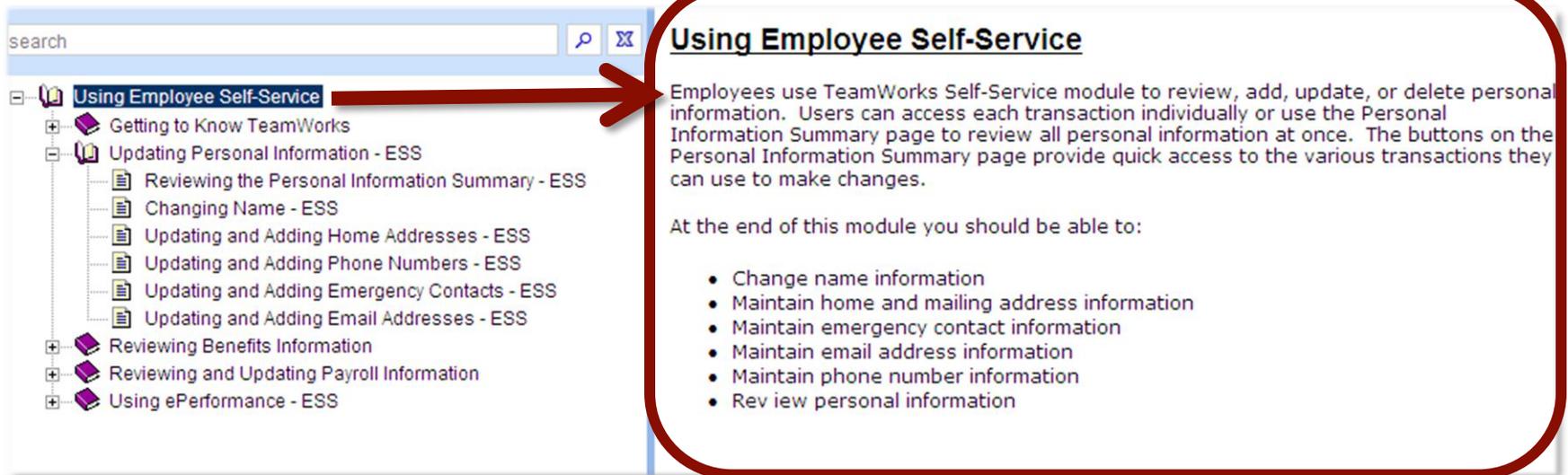
To expand the modules and sections, click the + next to the purple books . This expands the content.

To collapse the modules and sections, click the - next to the purple books .



The Concept Pane

When the user clicks on or expands a module, section, or topic, introductory information about that item displays in the concept pane. This information tells the user what the module, section, or topic is about and what they can expect to learn.



search

Using Employee Self-Service

- Getting to Know TeamWorks
- Updating Personal Information - ESS
 - Reviewing the Personal Information Summary - ESS
 - Changing Name - ESS
 - Updating and Adding Home Addresses - ESS
 - Updating and Adding Phone Numbers - ESS
 - Updating and Adding Emergency Contacts - ESS
 - Updating and Adding Email Addresses - ESS
- Reviewing Benefits Information
- Reviewing and Updating Payroll Information
- Using ePerformance - ESS

Using Employee Self-Service

Employees use TeamWorks Self-Service module to review, add, update, or delete personal information. Users can access each transaction individually or use the Personal Information Summary page to review all personal information at once. The buttons on the Personal Information Summary page provide quick access to the various transactions they can use to make changes.

At the end of this module you should be able to:

- Change name information
- Maintain home and mailing address information
- Maintain emergency contact information
- Maintain email address information
- Maintain phone number information
- Review personal information

The Concept Pane

When the user clicks a topic, the Concept Pane displays the See It! Try It!, Know It? and Print It! buttons. These buttons provide the user with four different way to interact with the training for a topic.

search

- Using Employee Self-Service
 - Getting to Know TeamWorks
 - Updating Personal Information - ESS
 - Reviewing the Personal Information Summary - ESS**
 - Changing Name - ESS
 - Updating and Adding Home Addresses - ESS
 - Updating and Adding Phone Numbers - ESS
 - Updating and Adding Emergency Contacts - ESS
 - Updating and Adding Email Addresses - ESS
 - Reviewing Benefits Information
 - Reviewing and Updating Payroll Information
 - Using ePerformance - ESS

Reviewing the Personal Information Summary - ESS

This topic focuses on the Personal Information Summary page review information such as name, addresses, phone numbers, emergency contacts, marital status and other personal information. From this page you can also update much of the information.

At the end of this topic you should be able to:

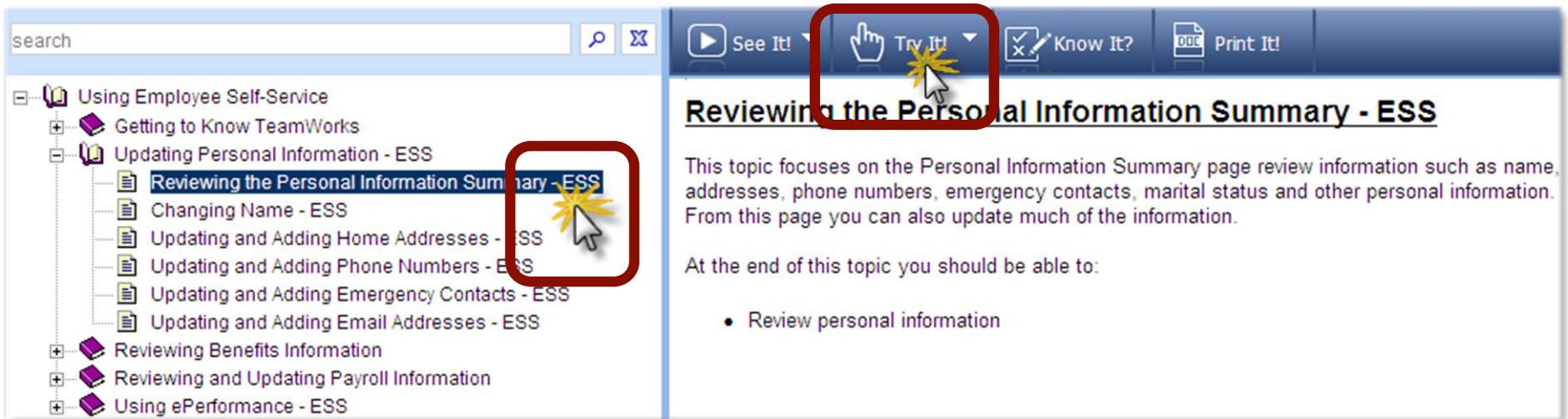
- Review personal information

Playback Modes

Button	Description
	<p>See It! – Clicking this button launches the topic in See It! mode! It enables the user to learn by watching the steps in a simulated environment like a video. All the required activities, such as moving the mouse and entering data, are completed automatically.</p>
	<p>Try It – Clicking this button launches the topic in Try It! mode. It enables the user to learn interactively in a simulated environment. During the simulation, the user is prompted for mouse clicks and/or keystrokes to complete the steps.</p>
	<p>Know It? – Clicking this button launches the topic in Know It? mode. It enables the user to learn by testing them on the tasks in a simulated environment. In this playback mode there are no prompts or instructions for the user to follow.</p>
	<p>Do It! – Clicking this button launches the topic in Do It! mode. It guides the user as they perform the tasks in the live TeamWorks environment.</p>
	<p>Print It! – Clicking this button does not launch the topic. It launches a printer pop up window and enables the user to print a copy of the topic as a job aid for reference.</p>

Playing a Topic

To launch a topic click and read through the content outline and concept pane to find the desired topic. Click to select the desired topic and then click the desired playback mode.



The screenshot shows a software interface for training. On the left is a navigation pane with a search bar and a tree view of topics. The topic "Reviewing the Personal Information Summary - ESS" is selected and highlighted with a red box. On the right is the main content area. At the top of this area is a playback control bar with buttons for "See It!", "Try It!", "Know It?", and "Print It!". The "Try It!" button is highlighted with a red box and a mouse cursor. Below the playback bar, the title "Reviewing the Personal Information Summary - ESS" is displayed. The main content area contains text describing the topic and a list of learning objectives.

Using Employee Self-Service

- Getting to Know TeamWorks
- Updating Personal Information - ESS
 - Reviewing the Personal Information Summary - ESS**
 - Changing Name - ESS
 - Updating and Adding Home Addresses - ESS
 - Updating and Adding Phone Numbers - ESS
 - Updating and Adding Emergency Contacts - ESS
 - Updating and Adding Email Addresses - ESS
- Reviewing Benefits Information
- Reviewing and Updating Payroll Information
- Using ePerformance - ESS

search

See It! Try It! Know It? Print It!

Reviewing the Personal Information Summary - ESS

This topic focuses on the Personal Information Summary page review information such as name, addresses, phone numbers, emergency contacts, marital status and other personal information. From this page you can also update much of the information.

At the end of this topic you should be able to:

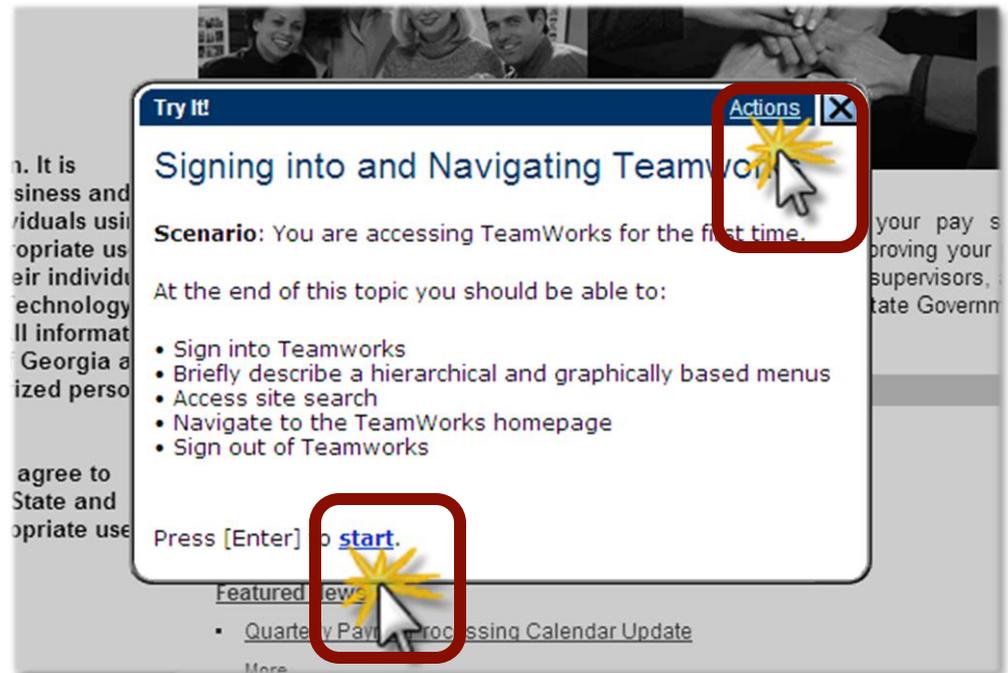
- Review personal information



Always take the training
in order the first time.

Navigating TeamWorks Online Training Simulation

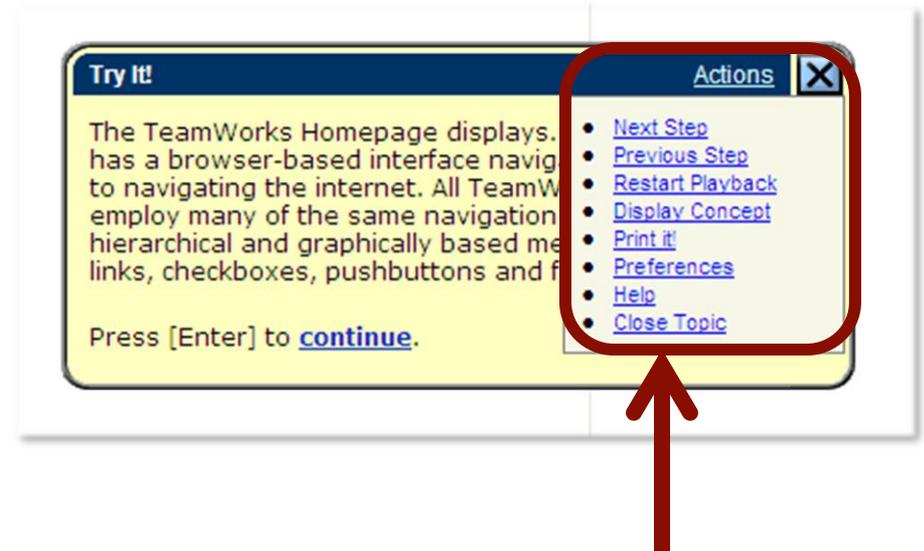
When the simulation player displays, it provides the user with an introduction bubble that includes a topic scenario, objectives and initial navigation if necessary. In this example, the user is playing the simulation in **Try It!** mode. This means the user has to read and follow the prompts to move through the topic. In addition, the user can navigate by using the **Actions** menu or by using the on screen instructions.



Navigating a TeamWorks Online Training Simulation

After the user clicks the **Action** link the TeamWorks Online Training player displays a small menu that includes key actions such as:

- Advance to the **Next Step** or screen
- Return to the **Previous Step** or screen
- **Restart Playback** restarts the topic from the beginning
- **Display Concept** pane or topic introduction
- **Print It!** prints a job aid of the topic
- Close the topic



Navigating a TeamWorks Online Training Simulation

The TeamWorks Online Training plays the topics in a simulation player. The training is best experienced in **Try It!** mode because it looks and feels to the user as if they are in TeamWorks. As the user moves through the simulation they are prompted with training content in the bubbles and prompts on where to click to advance through the simulated transaction.

Personal Information
Personal Information Summary

TEAMWORKS MENU

- My Help
- Quick Links
- SAO Support
- Self Service
- Manager Self Service
- Workforce Administration**
- Benefits
- Compensation
- Payroll for North America
- Global Payroll & Absence
- Workforce Development
- Organizational Development
- Enterprise Learning
- Workforce Monitoring
- Set Up HRMS
- PeopleSoft
- My Content
- Content Management
- Portal Administration
- Worklist

Try It! Actions X

To display a sub menu expand a menu item. In this example use the Workforce Administration menu.

Click the **Workforce Administration** link.

EMPLOYEE LEA

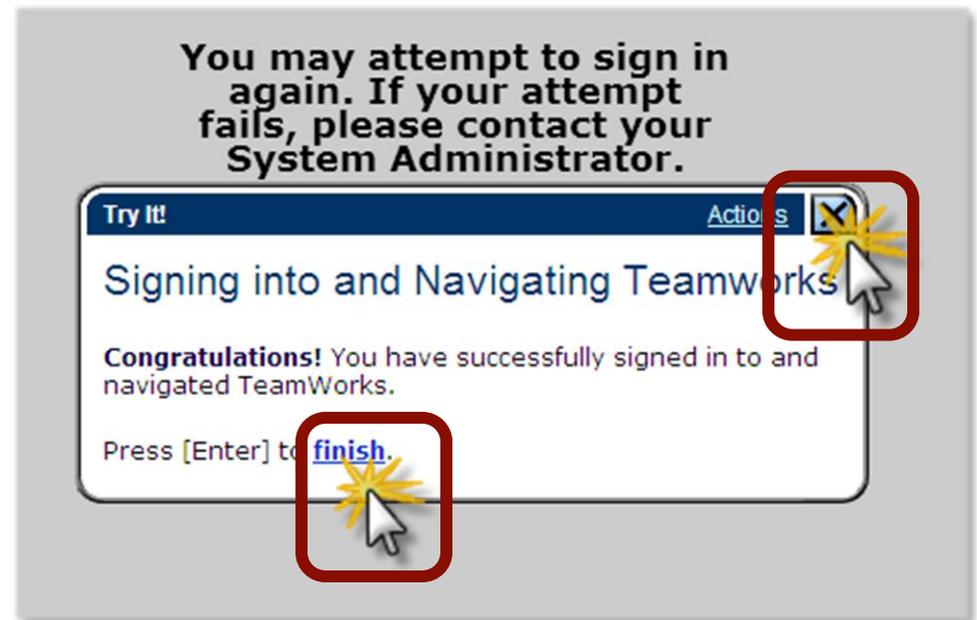
There is no information to display at this time. You are currently accessing this information.

Navigating a TeamWorks Online Training Simulation

When the user reaches the end of the topic they can close it in three ways:

- Click the **X**
- Click the **finish** link
- Press **Enter** on the keyboard

After closing the topic the TeamWorks Online Training Content Homepage displays.



Clicking the **finish** link or pressing **Enter** is always best.

What we've learned

- The TeamWorks Online Training a web-based self-paced training tool
- Users can access the TeamWorks Online Training via the SAO TeamWorks Training website
 - <http://sao.georgia.gov/teamworks-training>

[SAO TeamWorks Online
Training](http://sao.georgia.gov/teamworks-training)

- The training includes introductions and objectives for each module, section, and topic
- Topics provide users with objectives or goals
- Users can access content and play it in a variety of modes of which **Try It!** is best
- TeamWorks Online Training simulates the system and the tasks involved with completing a transaction

