

# Using TeamWorks Financials Online Training

# WHAT IS TEAMWORKS ONLINE TRAINING?

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



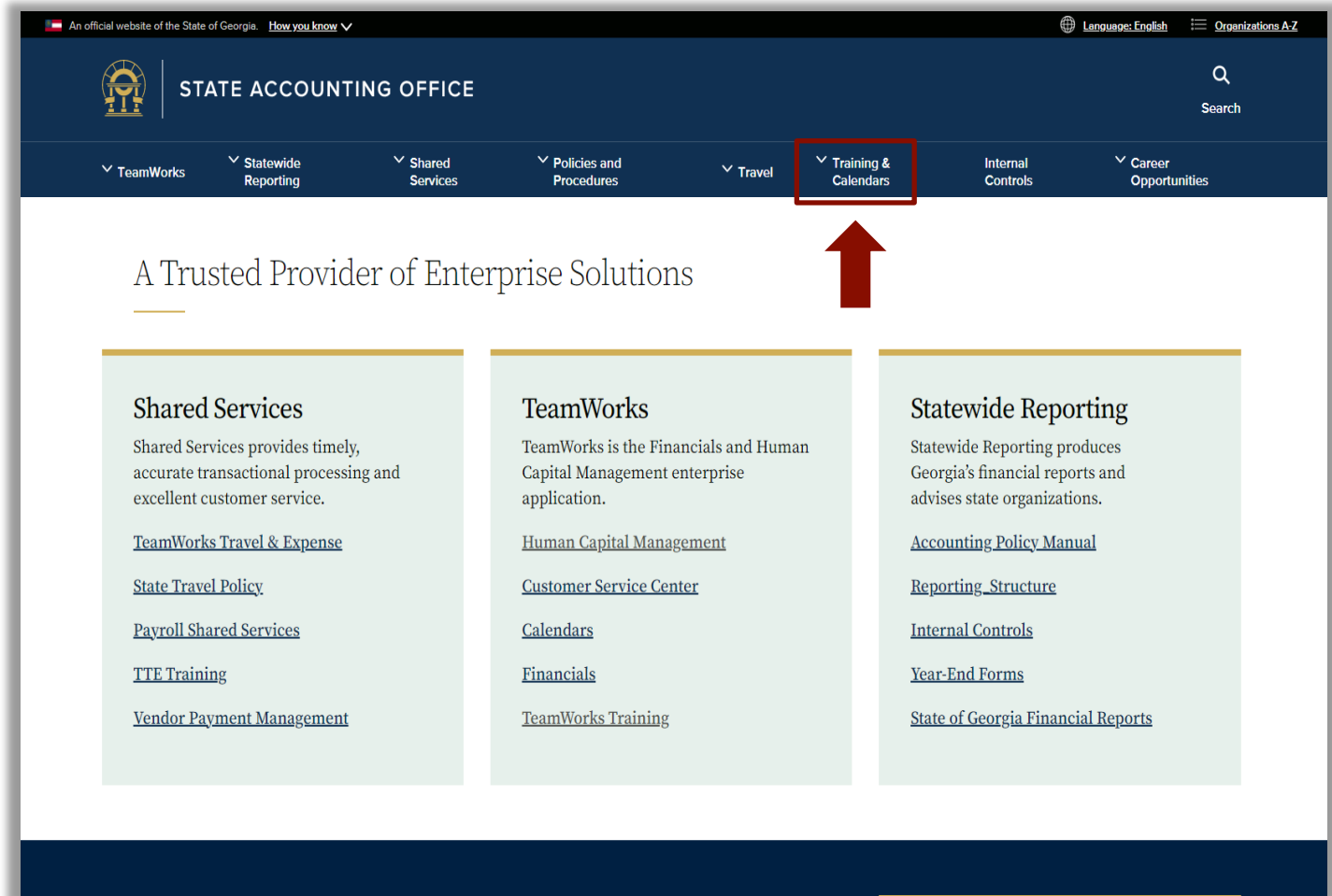
At the end of this presentation users should be able to:

- Navigate to the TeamWorks Online Training homepage
- Navigate a 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

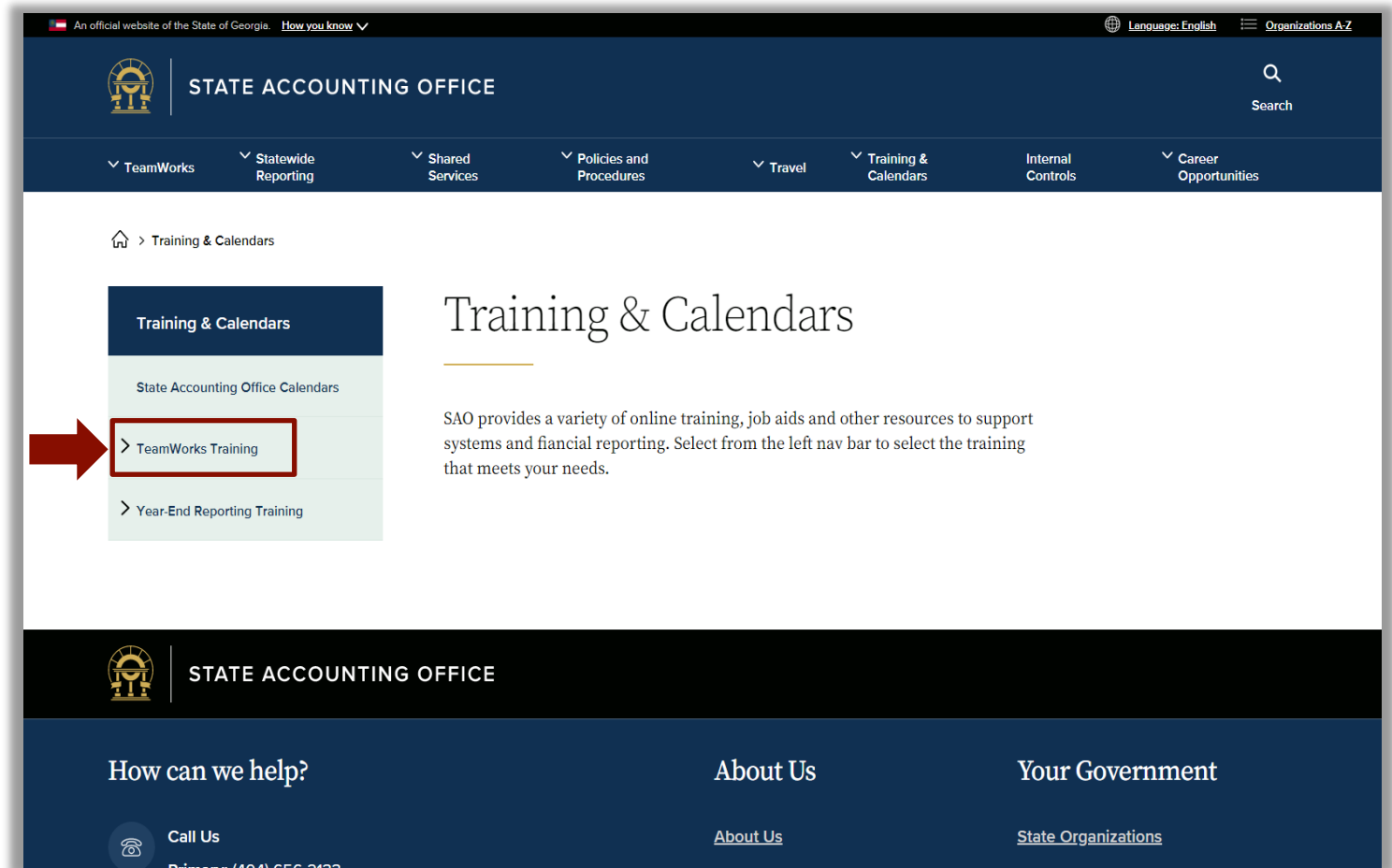
TeamWorks Online Training is located on the SAO Website [sao.georgia.gov](http://sao.georgia.gov).

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



# NAVIGATING TO TEAMWORKS ONLINE TRAINING

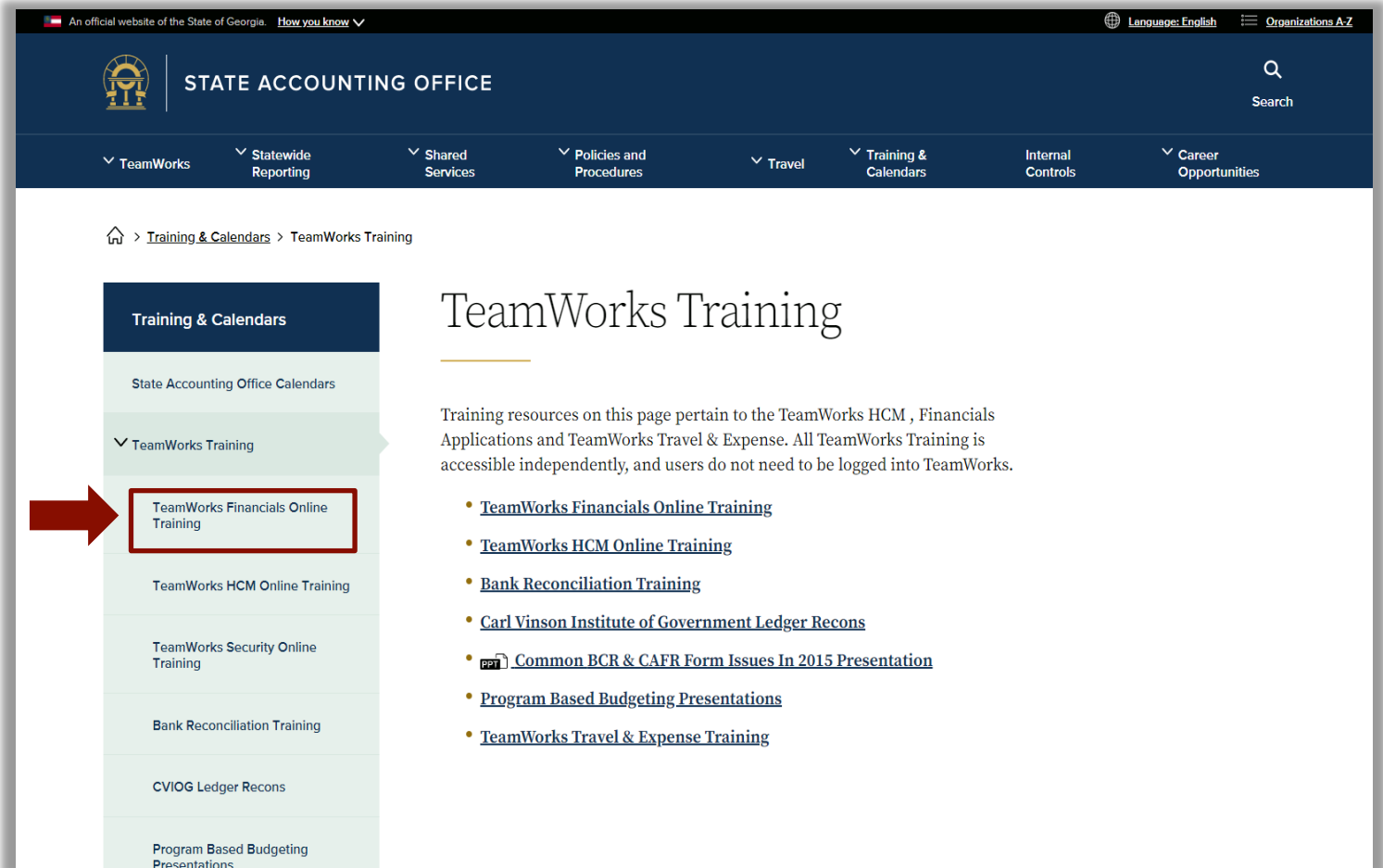
Click the **TeamWorks Training** link to access TeamWorks Online Training.



# NAVIGATING TO TEAMWORKS ONLINE TRAINING

Click the TeamWorks Financials Online Training link.

*Don't forget to save the TeamWorks Training page as a Favorite.*



<https://sao.georgia.gov/training-calendars/teamworks-training>

# ACCESSING TEAMWORKS ONLINE TRAINING

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

The screenshot shows the State Accounting Office website. The top navigation bar includes the State of Georgia logo, the text 'STATE ACCOUNTING OFFICE', and a search icon. Below this is a secondary navigation bar with links for TeamWorks, Statewide Reporting, Shared Services, Policies and Procedures, Travel, Training & Calendars, Internal Controls, and Career Opportunities. The main content area is titled 'TeamWorks Financials Online Training' and includes a description of the training and a list of links. A red arrow points from the 'TeamWorks Financials Online Training' link in the left sidebar to the 'Using TeamWorks Financials Online Training - PowerPoint Presentation' link in the main content area.

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

- [Using TeamWorks Financials Online Training - PowerPoint Presentation](#)
- [TeamWorks Financials Online Training](#)

**TeamWorks Financials Online Training**

1. Introduction to TeamWorks
2. Commitment Control
3. Purchasing
4. Accounts Payable

<https://sao.georgia.gov/training-calendars/teamworks-training/teamworks-financials-online-training>

# ACCESSING TEAMWORKS ONLINE TRAINING

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

1. Introduction to TeamWorks
2. Commitment Control
3. Purchasing
4. Accounts Payable
5. Accounts Receivables
6. General Ledger
7. Supplier
8. Customer
9. Asset Management
10. Salary, Travel and Per Diem
11. Asset Management
12. Project Costing
13. Project Costing Integration with Asset Management

**Training & Calendars**

- State Accounting Office Calendars
- ▼ TeamWorks Training
  - TeamWorks Financials Online Training**
  - TeamWorks HCM Online Training
  - TeamWorks Security Online Training
  - Bank Reconciliation Training
  - CVIOG Ledger Recons
  - Program Based Budgeting Presentations
  - ▶ Year-End Reporting Training

## TeamWorks Financials Online Training

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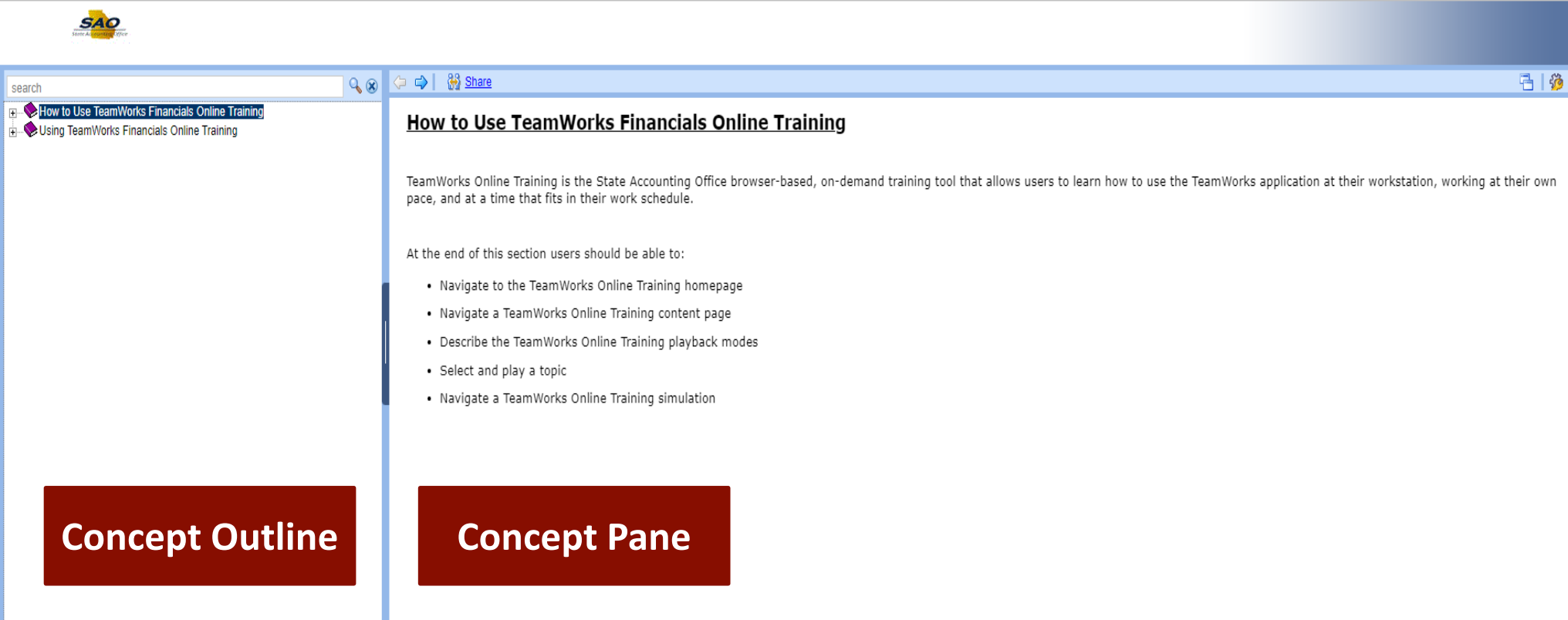
- [Using TeamWorks Financials Online Training - PowerPoint Presentation](#)
- **[TeamWorks Financials Online Training](#)**

### TeamWorks Financials Online Training

1. Introduction to TeamWorks
2. Commitment Control
3. Purchasing
4. Accounts Payable
5. Accounts Receivable
6. General Ledger
7. Labor Distribution
8. Supplier
9. Customer
10. Salary, Travel and Per Diem
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12. Project Costing
13. Project Costing Integration with Asset Management



# THE TRAINING CONTENT HOMEPAGE



The screenshot displays the 'How to Use TeamWorks Financials Online Training' homepage. The interface is divided into two main sections. On the left, a sidebar contains a search bar and a list of topics: 'How to Use TeamWorks Financials Online Training' (highlighted) and 'Using TeamWorks Financials Online Training'. On the right, the main content area features the title 'How to Use TeamWorks Financials Online Training' and a paragraph describing the training tool. Below this, a list of learning objectives is provided. Two red callout boxes are overlaid on the bottom of the screenshot: 'Concept Outline' pointing to the sidebar and 'Concept Pane' pointing to the main content area.

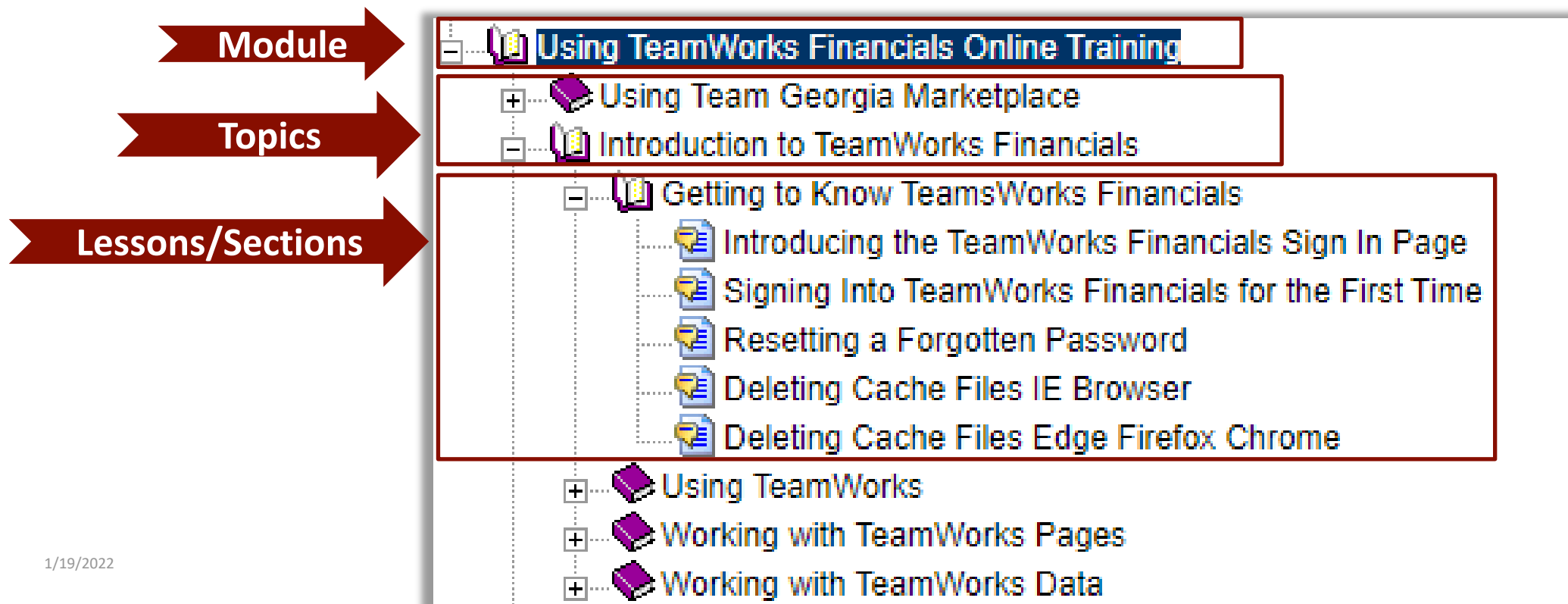
**Concept Outline**

**Concept Pane**

The next slides focus on the Training Content Outline.


# THE CONTENT OUTLINE

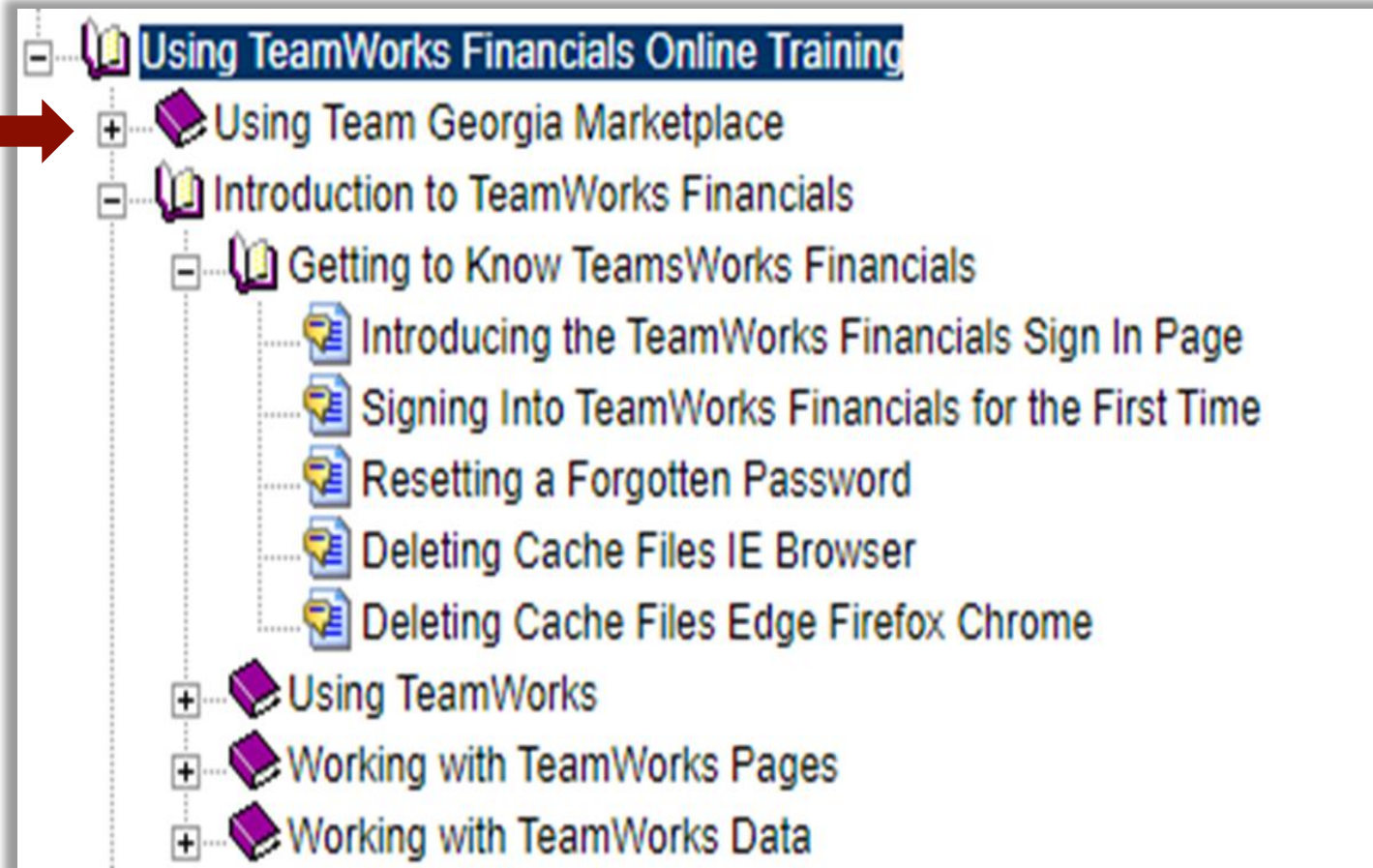
The TeamWorks Online Training player is organized into a folder hierarchy. The course outlines are structured as shown below:



# THE CONTENT OUTLINE

Click the + plus sign  next to the purple books to expand or open the Modules and Sections.

Click the – minus sign  next to the purple books to collapse or close the Modules and Sections.



# 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.

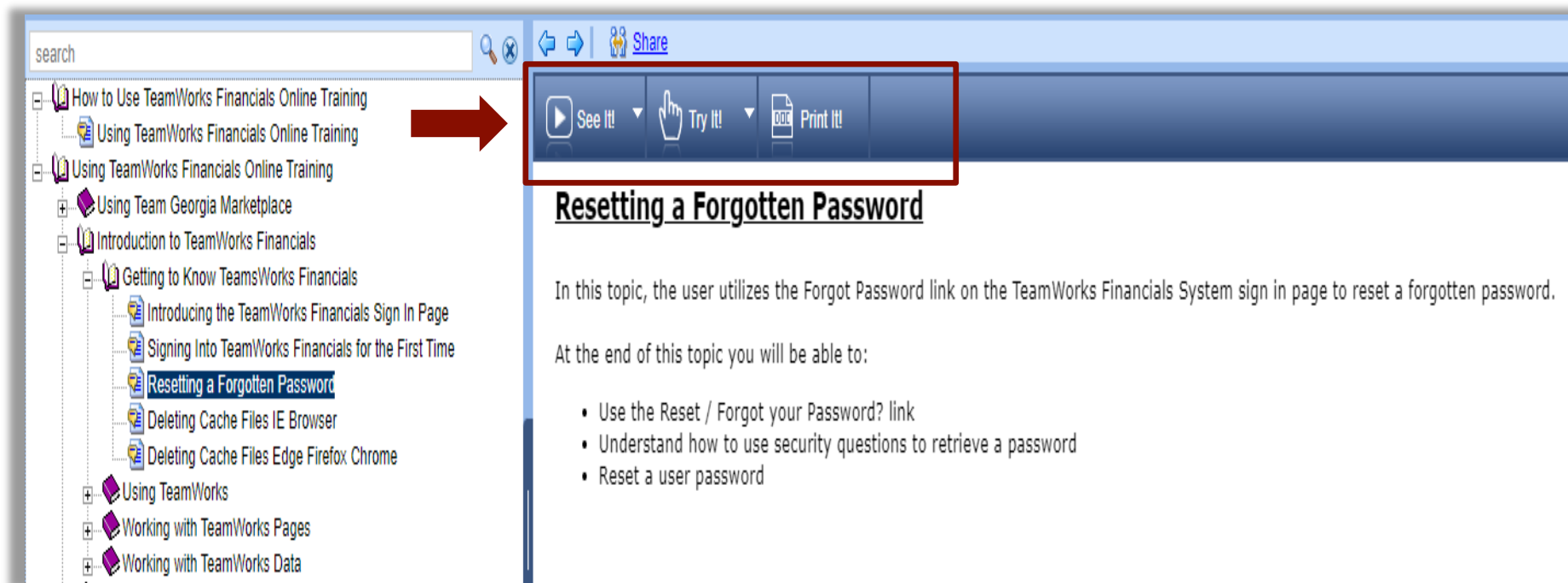


The screenshot illustrates the 'Concept Pane' functionality. On the left, a navigation tree lists various topics. The topic 'Resetting a Forgotten Password' is selected and highlighted with a red box. A red arrow points from this selection to the Concept Pane on the right. The Concept Pane displays the following information:




- Buttons: See It!, Try It!, Print It!
- Resetting a Forgotten Password**
- In this topic, the user utilizes the Forgot Password link on the TeamWorks Financials System sign in page to reset a forgotten password.
- At the end of this topic you will be able to:
  - Use the Reset / Forgot your Password? link
  - Understand how to use security questions to retrieve a password
  - Reset a user password

# THE CONCEPT PANE

When the user clicks a topic, the **Concept Pane** displays the See It!, Try It!, and Print It! buttons. These buttons provide the user with three different ways to interact with the training for a topic.



# PLAYBACK MODES

Button	Description
	<b>See it!</b> – Clicking this button launches the topic in See it! mode. It enables the users 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.
	<b>Try it!</b> – Clicking this button launches the topic Try it! mode. It enables the user to learn interactively in a simulation environment. During the simulation, the user is prompted for mouse clicks and/or keystrokes to complete the steps.
	<b>Print it!</b> – Clicking this button does not launch a topic. It launches a printer popup window that enables the user to print a copy of the topic as a job aid for reference.

# 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 displays the TeamWorks Financials Online Training interface. On the left, a content outline lists various topics, with 'Resetting a Forgotten Password' selected and highlighted by a red box. On the right, the topic content is displayed, including a title 'Resetting a Forgotten Password', a description, and a list of learning objectives. A red arrow points to the 'Try It!' button in the playback controls.

**Resetting a Forgotten Password**

In this topic, the user utilizes the Forgot Password link on the TeamWorks Financials System sign in page to reset a forgotten password.

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

- Use the Reset / Forgot your Password? link
- Understand how to use security questions to retrieve a password
- Reset a user password



The first time through the training topics, always start at the top and proceed in ascending order.



# 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.

- For 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 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:

- **Next Step** to advance to the next screen
- **Display Concept** pane or topic introduction
- **Print it!** prints the job aid for the topic
- **Close Topic** returns to the topic options



# NAVIGATING 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 yellow bubbles and prompts on where to click to advance through the simulated transaction.

Forgot My Password

Help

**User Information**

User ID: JDOE1111

Please answer the following question below for user validation.

Question: In what town was your first job?

Response:

Question: In what city did your mother and father meet?

Response:

Question: In what city did you meet your spouse?

Response:

Continue

**Try It!** Actions X

Enter the appropriate response for the listed question into the **Response** field

For this example, type **Atlanta**.

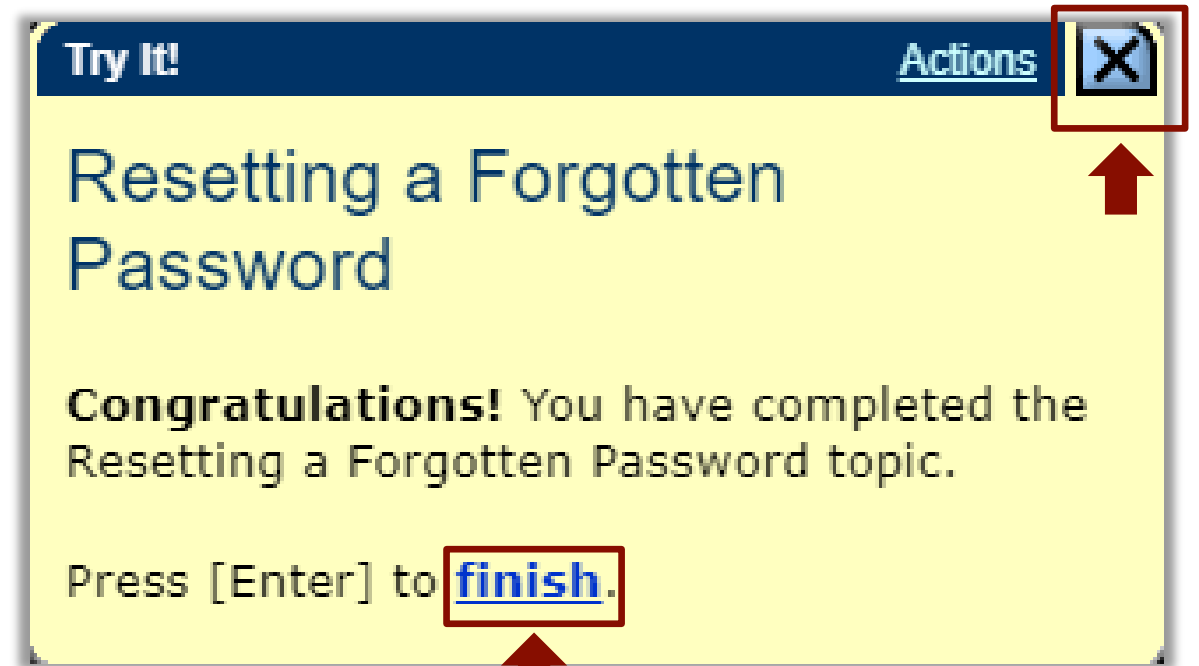
Typing Complete

# NAVIGATING 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 HAVE LEARNED

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