

# Using TeamWorks Security 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



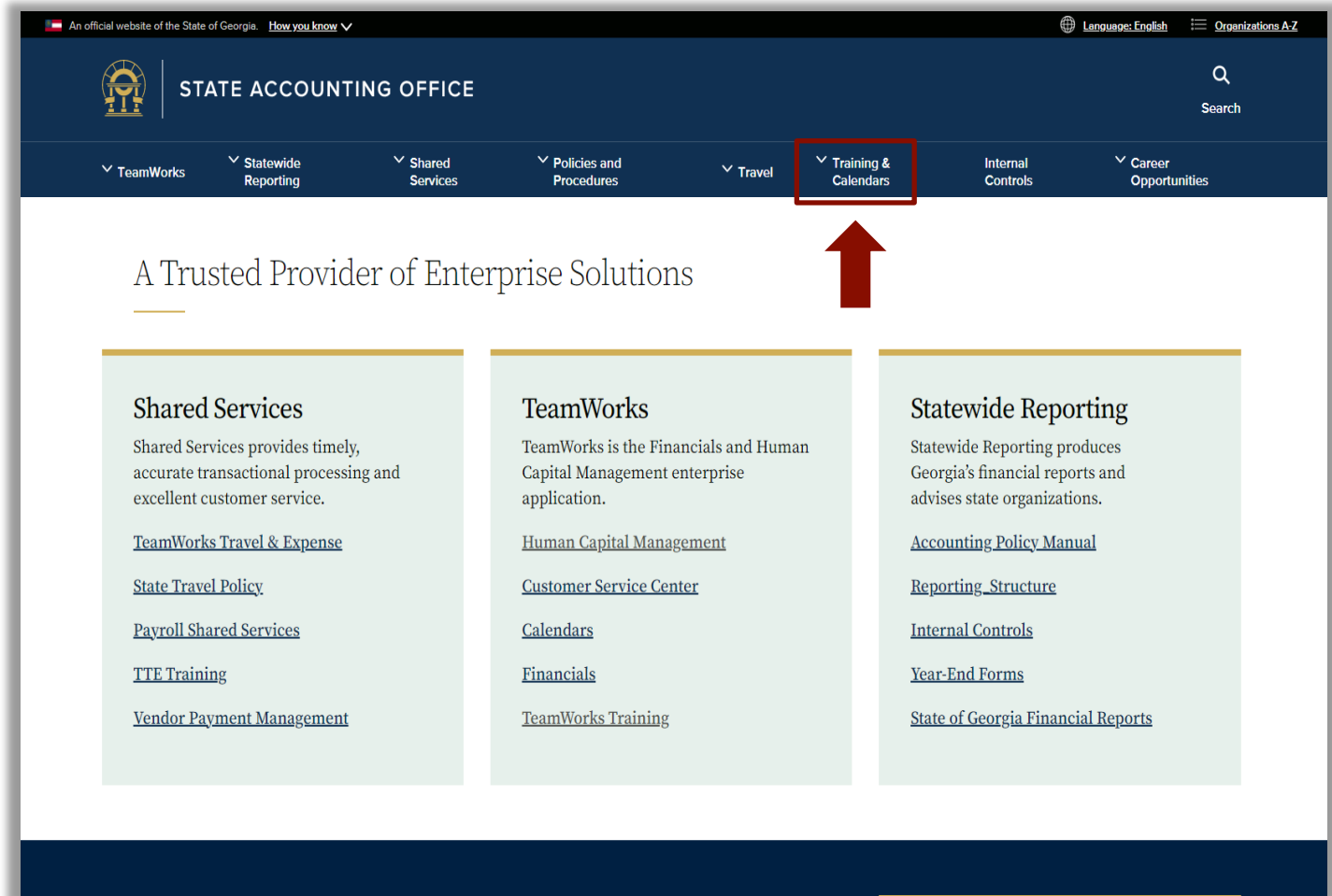
At the end of this presentation users should be able to:

- 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

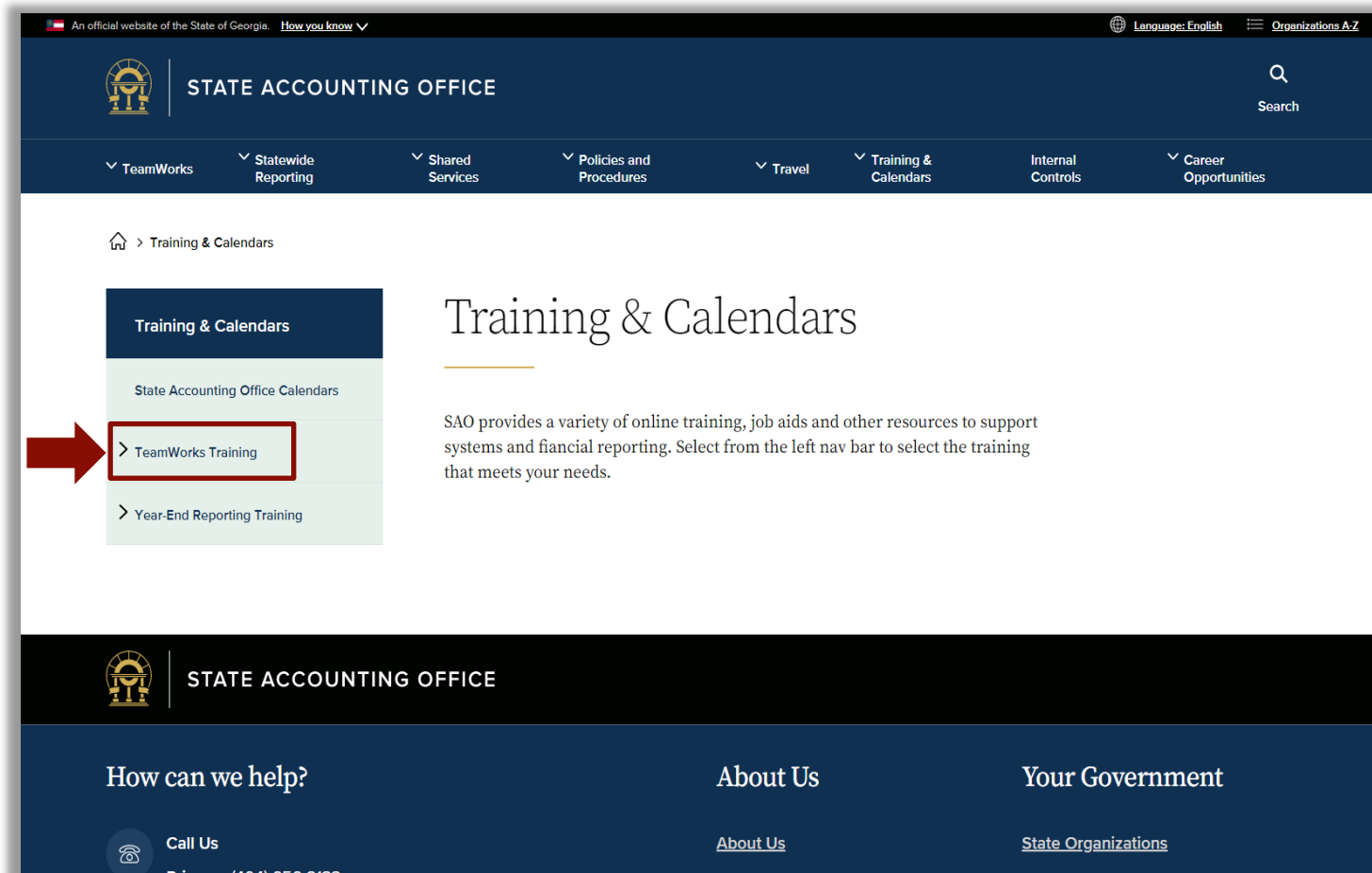
TeamWorks Online Training is located on the SAO Website [sao.georgia.gov](http://sao.georgia.gov).

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 Security Online Training** link.

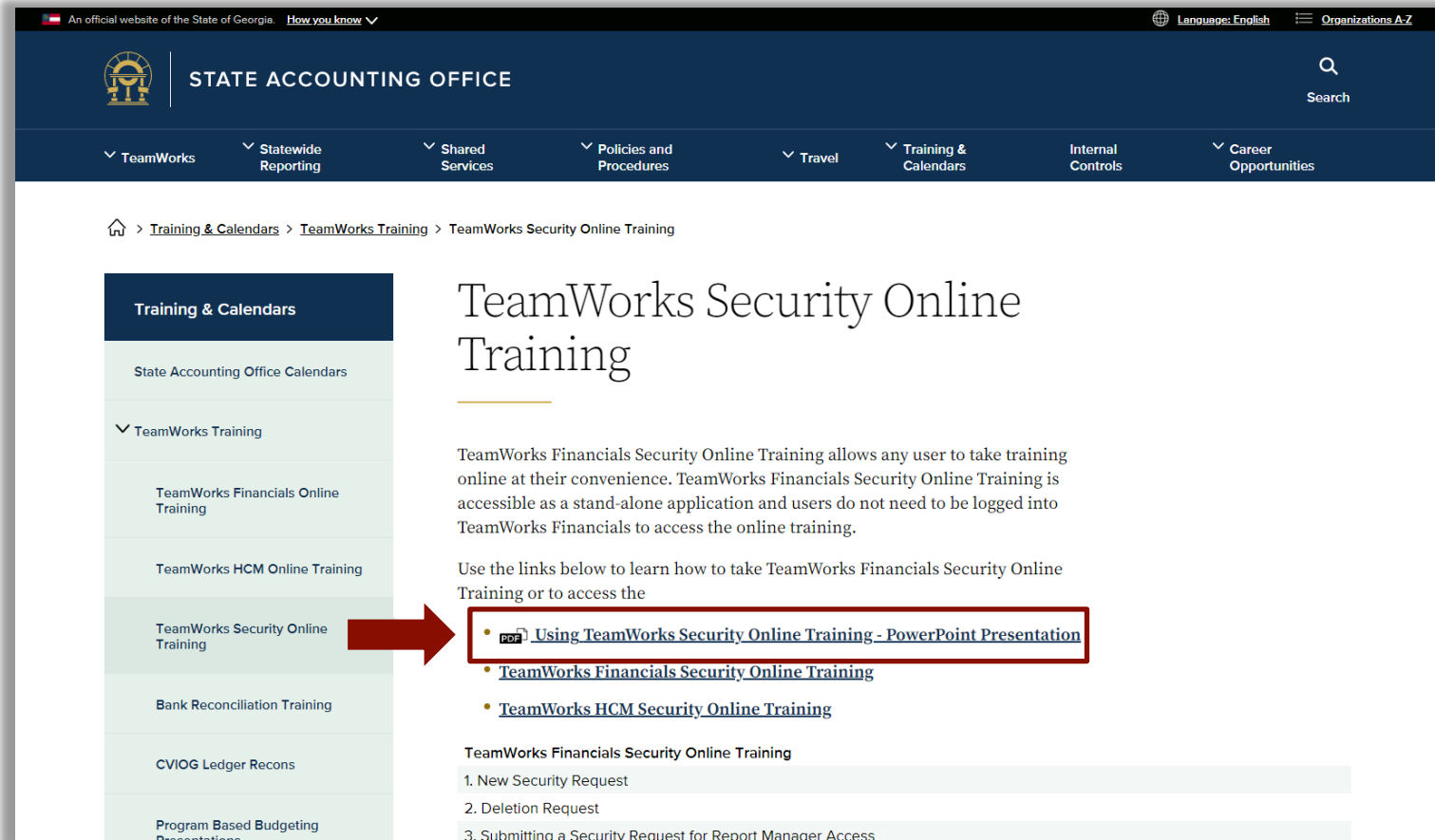
*Don't forget to save the **TeamWorks Training** page as a Favorite.*

The screenshot shows the State Accounting Office website. The header includes the state flag, 'An official website of the State of Georgia', 'How you know', 'Language: English', and 'Organizations A-Z'. The main navigation bar features links for TeamWorks, Statewide Reporting, Shared Services, Policies and Procedures, Travel, Training & Calendars, Internal Controls, and Career Opportunities. The breadcrumb trail indicates the path: Home > Training & Calendars > TeamWorks Training. The left sidebar, under 'Training & Calendars', lists various training options, with 'TeamWorks Security Online Training' highlighted by a red box and a red arrow. The main content area, titled 'TeamWorks Training', provides an overview of the training resources and lists several links: TeamWorks Financials Online Training, TeamWorks HCM Online Training, Bank Reconciliation Training, Carl Vinson Institute of Government Ledger Recons, Common BCR & CAFR Form Issues In 2015 Presentation (marked with a PPT icon), Program Based Budgeting Presentations, and TeamWorks Travel & Expense Training.

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

# ACCESSING TEAMWORKS ONLINE TRAINING

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



The screenshot shows the State Accounting Office website. The top navigation bar includes links for TeamWorks, Statewide Reporting, Shared Services, Policies and Procedures, Travel, Training & Calendars, Internal Controls, and Career Opportunities. The left sidebar under 'Training & Calendars' lists various training options, with 'TeamWorks Security Online Training' highlighted. A red arrow points from this link to the main content area, which displays the 'TeamWorks Security Online Training' page. The page includes a description of the training and a list of links, with the 'Using TeamWorks Security Online Training - PowerPoint Presentation' link highlighted in a red box.

STATE ACCOUNTING OFFICE

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

## TeamWorks Security Online Training

TeamWorks Financials Security Online Training allows any user to take training online at their convenience. TeamWorks Financials Security 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 Security Online Training or to access the

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

TeamWorks Financials Security Online Training

1. New Security Request
2. Deletion Request
3. Submitting a Security Request for Report Manager Access

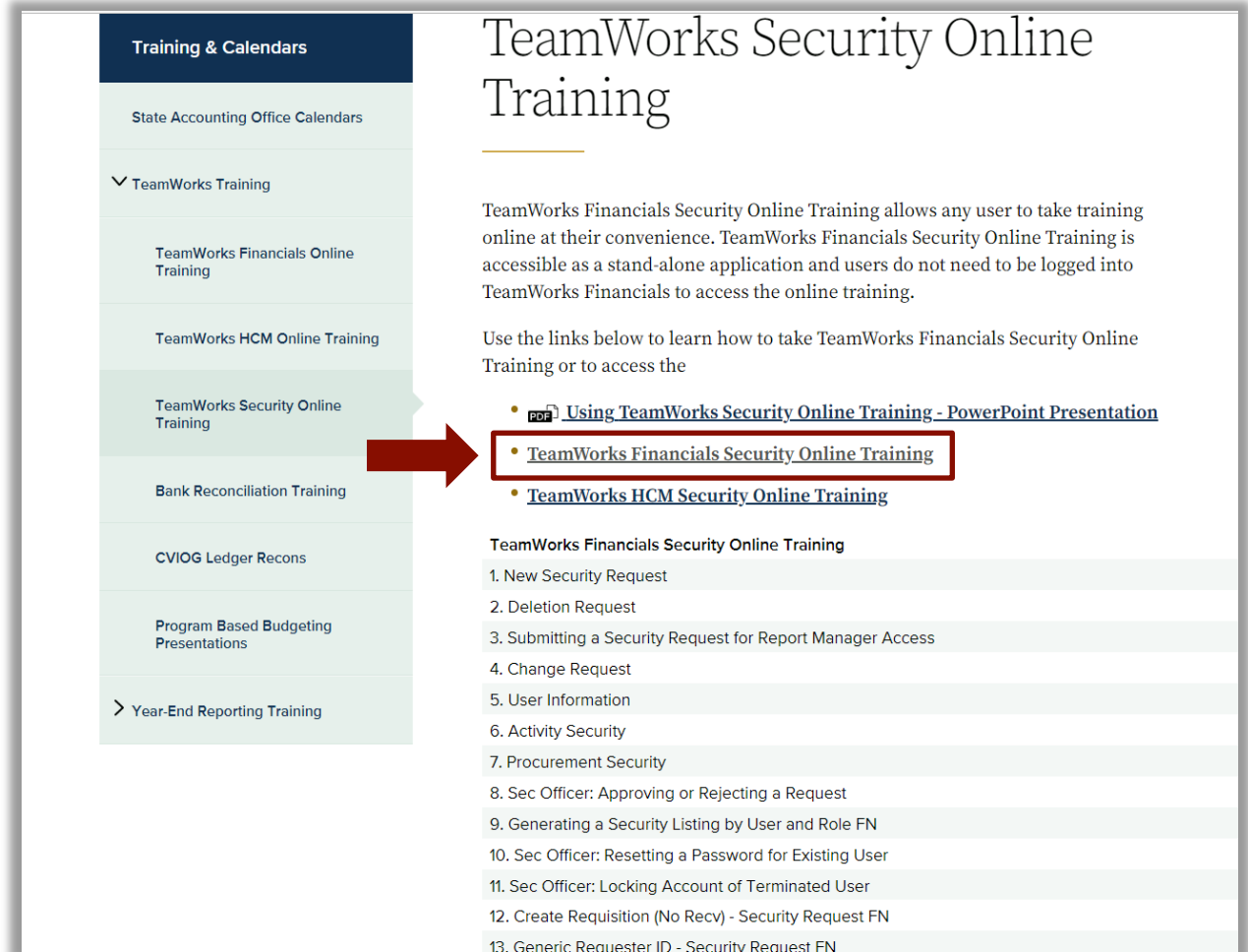
<https://sao.georgia.gov/training-calendars/teamworks-training/teamworks-security-online-training>

# ACCESSING TEAMWORKS ONLINE TRAINING

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

1. New Security Request
2. Deletion Request
3. Submitting a Security Request for Report Manager Access
4. Change Request
5. User Information
6. Activity Security
7. Procurement Security
8. Sec Officer: Approving or Rejecting a Request
9. Generating a Security Listing by User and Role FN
10. Sec Officer: Resetting a Password for Existing User
11. Sec Officer: Locking Account of Terminated User
12. Create Requisition (No Recv) - Security Request FN
13. Generic Requester ID - Security Request FN

1/19/2022



**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 Security Online Training

TeamWorks Financials Security Online Training allows any user to take training online at their convenience. TeamWorks Financials Security 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 Security Online Training or to access the

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

### TeamWorks Financials Security Online Training

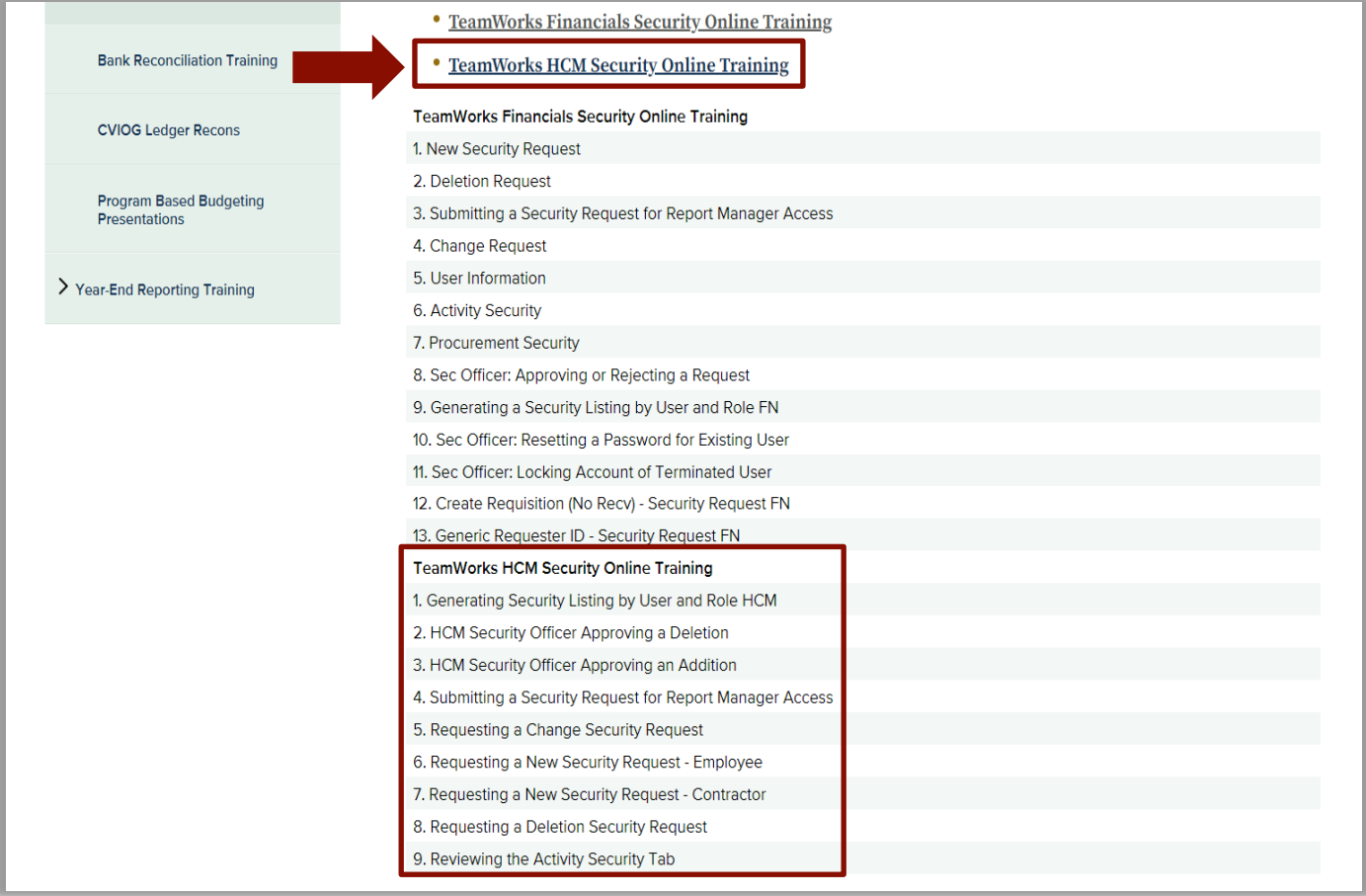
1. New Security Request
2. Deletion Request
3. Submitting a Security Request for Report Manager Access
4. Change Request
5. User Information
6. Activity Security
7. Procurement Security
8. Sec Officer: Approving or Rejecting a Request
9. Generating a Security Listing by User and Role FN
10. Sec Officer: Resetting a Password for Existing User
11. Sec Officer: Locking Account of Terminated User
12. Create Requisition (No Recv) - Security Request FN
13. Generic Requester ID - Security Request FN



# ACCESSING TEAMWORKS ONLINE TRAINING

Click the **TeamWorks HCM Security Online Training** links to access training modules for:

1. Generating Security Listing by User and Role HCM
2. HCM Security Officer Approving a Deletion
3. HCM Security Officer Approving an Addition
4. Submitting a Security Request for Report Manager Access
5. Requesting a Change Security Request
6. Requesting a New Security Request - Employee
7. Requesting a New Security Request - Contractor
8. Requesting a Deletion Security Request
9. Reviewing the Activity Security Tab



The screenshot shows a web interface with a left-hand navigation menu and a main content area. The navigation menu includes links for 'Bank Reconciliation Training', 'C/IOG Ledger Recons', 'Program Based Budgeting Presentations', and '> Year-End Reporting Training'. A red arrow points from the 'Bank Reconciliation Training' link to the 'TeamWorks HCM Security Online Training' link in the main content area. This link is highlighted with a red box. Below it, a list of training modules is displayed, with the first nine items also highlighted by a red box.

- [TeamWorks Financials Security Online Training](#)
- [TeamWorks HCM Security Online Training](#)

**TeamWorks Financials Security Online Training**

1. New Security Request
2. Deletion Request
3. Submitting a Security Request for Report Manager Access
4. Change Request
5. User Information
6. Activity Security
7. Procurement Security
8. Sec Officer: Approving or Rejecting a Request
9. Generating a Security Listing by User and Role FN
10. Sec Officer: Resetting a Password for Existing User
11. Sec Officer: Locking Account of Terminated User
12. Create Requisition (No Recv) - Security Request FN
13. Generic Requester ID - Security Request FN

**TeamWorks HCM Security Online Training**

1. Generating Security Listing by User and Role HCM
2. HCM Security Officer Approving a Deletion
3. HCM Security Officer Approving an Addition
4. Submitting a Security Request for Report Manager Access
5. Requesting a Change Security Request
6. Requesting a New Security Request - Employee
7. Requesting a New Security Request - Contractor
8. Requesting a Deletion Security Request
9. Reviewing the Activity Security Tab

# THE TRAINING CONTENT HOMEPAGE

The screenshot shows the Training Content Homepage interface. At the top left is the SAO logo. Below it is a search bar. The sidebar on the left contains a list of training topics, with 'Requesting a New Security Request' highlighted. The main content area on the right displays the selected topic, 'Requesting a new Security Request', with a description and a list of learning objectives. A red box labeled 'Concept Outline' points to the sidebar, and another red box labeled 'Concept Pane' points 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 Security course outline is structured as shown below:



## Lessons/Sections

\*This course outline only has lessons/sections.

- Requesting a New Security Request
- Requesting a Deletion Security Request
- Submitting a Security Request for Report Manager Access
- Requesting a Change Security Request
- Reviewing the User Information Tab
- Reviewing the Activity Security Tab
- Changing Procurement Security Access
- Sec Officer: Approving or Rejecting a Request
- Generating Security Report by User
- Sec Officer: Resetting Password for Existing User
- Sec Officer: Locking Account of Terminated User
- Create Requisition (No Receiving) Activity - FN
- Generic Requester ID - Security Request FN

# THE CONCEPT PANE

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



The screenshot displays a software interface with a left-hand navigation pane and a main content area. The navigation pane lists several topics, with "Requesting a Change Security Request" highlighted by a red box. A red arrow points from this box to the main content area. The main content area has a blue header bar with three buttons: "See It!", "Try It!", and "Print It!". Below the header, the title "Requesting a Change Security Requests" is displayed. The text below the title explains that the topic covers how a Manager requests a change to security access in the TeamWorks Financials Security environment. It also lists the learning objectives for the user.

**Requesting a Change Security Requests**

This topic covers how a Manager requests a change to security access in the TeamWorks Financials Security environment.

At the end of this topic, the user should be able to:

- Create a new Security Request for a change(s) to security access for employees or contractors
- Be familiar with the security requests to update user data
- Navigate and make changes on the Activity Security Request tab
- Change the Status of a Security Request

# 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.

The screenshot displays a software interface with a left-hand navigation pane and a main content area. The left pane contains a list of topics, with 'Requesting a Change Security Request' highlighted. A red arrow points from this topic to the top of the main content area. The main area has a blue header bar containing three buttons: 'See It!' (with a play icon), 'Try It!' (with a hand icon), and 'Print It!' (with a document icon). Below the header, the title 'Requesting a Change Security Requests' is displayed. The content text states: 'This topic covers how a Manager requests a change to security access in the TeamWorks Financials Security environment. At the end of this topic, the user should be able to:'. A bulleted list follows: '• Create a new Security Request for a change(s) to security access for employees or contractors', '• Be familiar with the security requests to update user data', '• Navigate and make changes on the Activity Security Request tab', and '• Change the Status of a Security Request'.

Requesting a New Security Request

Requesting a Deletion Security Request

Submitting a Security Request for Report Manager Access

**Requesting a Change Security Request**

Reviewing the User Information Tab

Reviewing the Activity Security Tab

Changing Procurement Security Access

Sec Officer: Approving or Rejecting a Request

Generating Security Report by User

Sec Officer: Resetting Password for Existing User

Sec Officer: Locking Account of Terminated User

Create Requisition (No Receiving) Activity - FN

Generic Requester ID - Security Request FN




**Requesting a Change Security Requests**

This topic covers how a Manager requests a change to security access in the TeamWorks Financials Security environment.

At the end of this topic, the user should be able to:

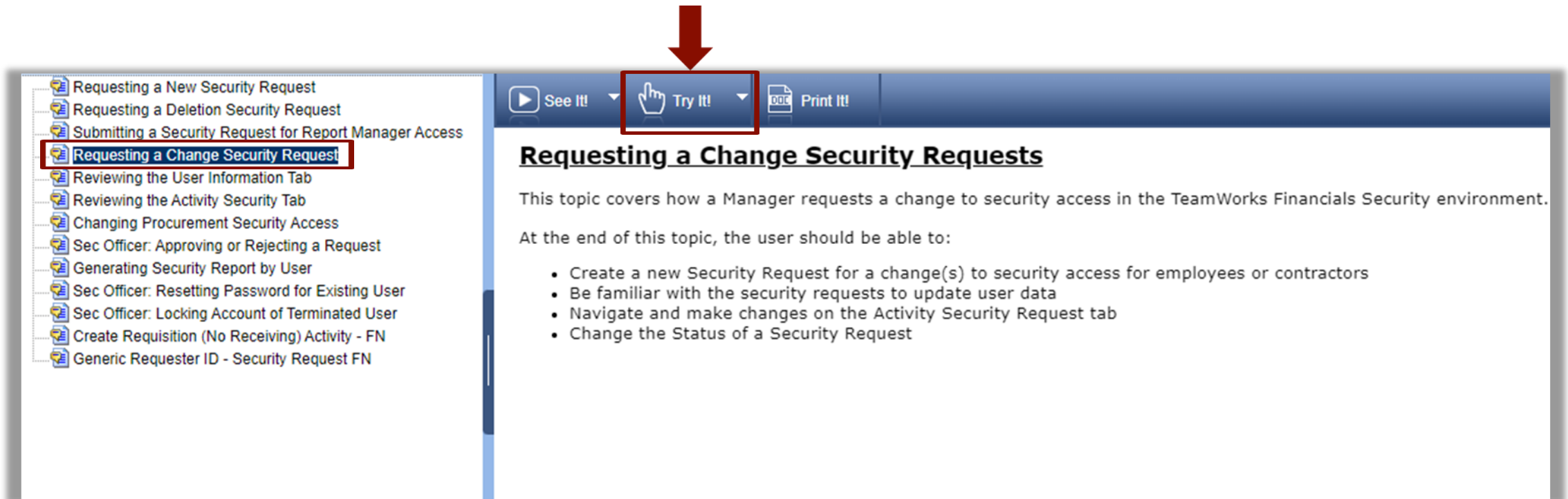
- Create a new Security Request for a change(s) to security access for employees or contractors
- Be familiar with the security requests to update user data
- Navigate and make changes on the Activity Security Request tab
- Change the Status of a Security Request

# 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 a training application interface. On the left is a content outline with the following items:

- Requesting a New Security Request
- Requesting a Deletion Security Request
- Submitting a Security Request for Report Manager Access
- Requesting a Change Security Requests** (highlighted with a red box)
- Reviewing the User Information Tab
- Reviewing the Activity Security Tab
- Changing Procurement Security Access
- Sec Officer: Approving or Rejecting a Request
- Generating Security Report by User
- Sec Officer: Resetting Password for Existing User
- Sec Officer: Locking Account of Terminated User
- Create Requisition (No Receiving) Activity - FN
- Generic Requester ID - Security Request FN

On the right, the selected topic is displayed with the title **Requesting a Change Security Requests**. Below the title, it states: "This topic covers how a Manager requests a change to security access in the TeamWorks Financials Security environment." and "At the end of this topic, the user should be able to:" followed by a list of objectives:

- Create a new Security Request for a change(s) to security access for employees or contractors
- Be familiar with the security requests to update user data
- Navigate and make changes on the Activity Security Request tab
- Change the Status of a Security Request

At the top of the right pane, there are playback controls: "See It!" (with a play icon), "Try It!" (with a hand icon and highlighted by a red box and a red arrow pointing down), and "Print It!" (with a printer icon).

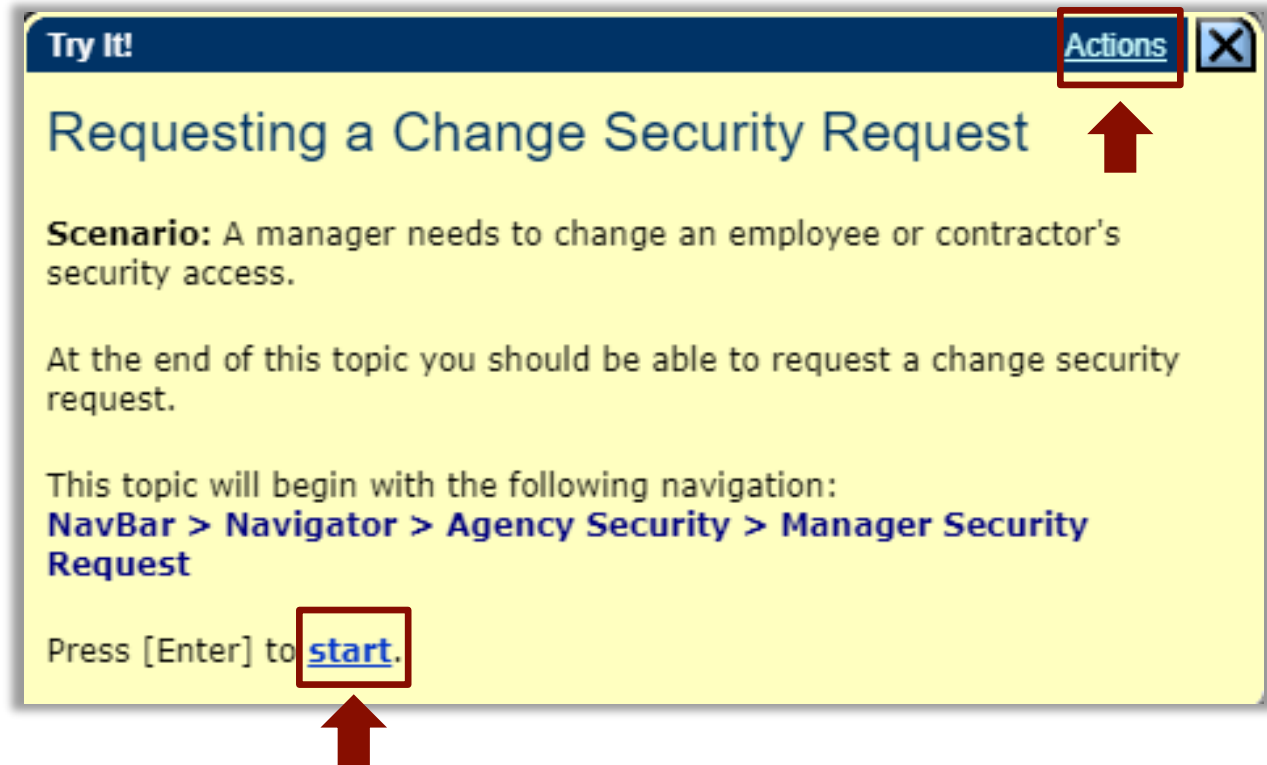


The first time through the training topics, always start at the top and proceed in ascending order.

# 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.

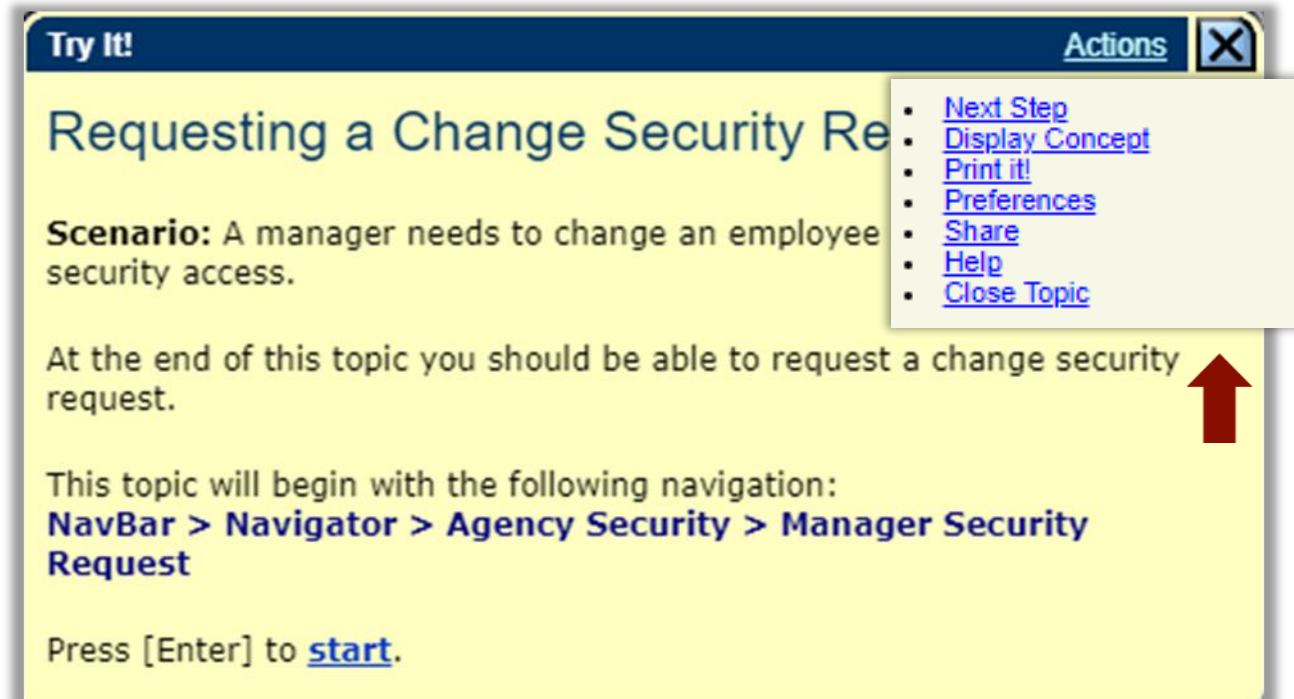




# NAVIGATING TEAMWORKS ONLINE TRAINING SIMULATION

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.

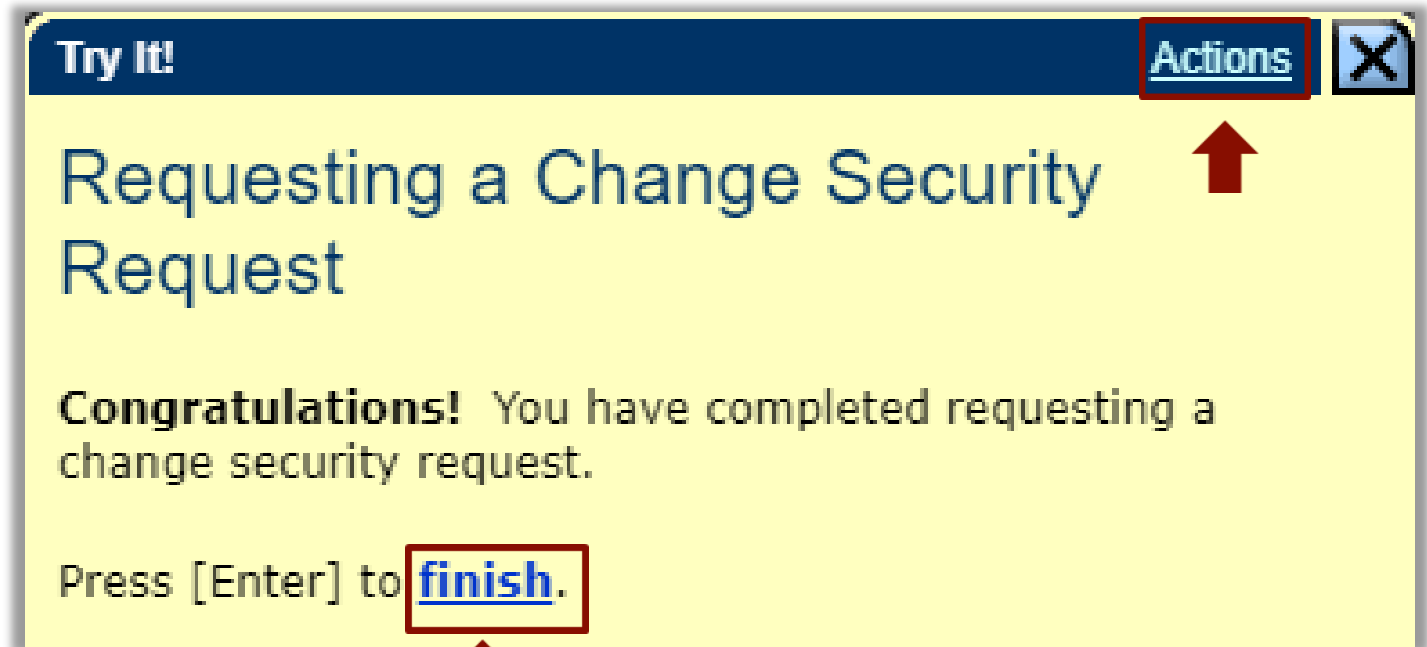
The screenshot shows the 'Manager Security Request' form in the TeamWorks Online Training simulation. The form is titled 'Manager Security Request' and includes a sub-header 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a red box. A yellow callout bubble with the title 'Try It!' and a close button is overlaid on the form. The bubble contains the text: 'To make a change to security access, a new security request will need to be created. Click the **Add a New Value** tab.' A red arrow points from the bubble to the 'Add a New Value' tab. The form itself contains several fields for search criteria, including Business Unit, Request ID, Seq Nbr, Requested Date, Last Name, Empl ID, User ID, Action, Status, Access Type, and Expiration Date. Each field has a dropdown menu for selection. At the bottom of the form, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The footer of the form displays 'Find an Existing Value | Add a New Value'.

# 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