

Using TeamWorks Financials Online Training

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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.

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

The screenshot shows the Georgia State Accounting Office website. At the top, there is a navigation bar with links for 'About Us', 'Contact Us', 'Careers', and 'Translate'. Below this is the SAO logo and the text 'State Accounting Office' and 'Fiscal Leadership for Georgia'. A search bar is located on the right. A horizontal menu contains several links: 'TeamWorks', 'Statewide Reporting', 'Shared Services', 'Policies and Procedures', 'Travel', 'Training & Calendars', and 'Internal Controls'. The 'Training & Calendars' link is highlighted with a yellow box and a red arrow. Below the menu is a large banner for 'TeamWorks Travel and Expense' with a 'Read More' button. At the bottom, there are three columns of content: 'Travel' with links for 'Statewide Travel Policy' and 'TeamWorks Travel and Expense Implementation Information'; 'News Releases' with a link for 'TeamWorks Recognized as Enterprise Application'; and 'TeamWorks Financials 9.2 Upgrade' with a link for 'Details and updates'.

NAVIGATING TO TEAMWORKS ONLINE TRAINING

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

The screenshot shows the Georgia State Accounting Office website. At the top, there is a navigation bar with links for 'About Us', 'Contact Us', 'Careers', and 'Translate'. Below this is the State Accounting Office logo and the text 'Fiscal Leadership for Georgia'. A search bar is located on the right side. The main navigation menu includes 'TeamWorks', 'Statewide Reporting', 'Shared Services', 'Policies and Procedures', 'Travel', 'Training & Calendars', and 'Internal Controls'. The 'Training & Calendars' page is active, showing a breadcrumb trail 'Home » Training & Calendars' and the title 'Training & Calendars'. A left sidebar menu lists 'Accounting Training and CPE Links', 'State Accounting Office Calendars', 'TeamWorks Training', and 'Year-End Reporting Training'. The 'TeamWorks Training' link is highlighted with a yellow box and a red arrow pointing to it. The main content area contains introductory text about the training resources.

Use Ctrl key + Click the button to access the SAO TeamWorks Online Training page.



NAVIGATING TO TEAMWORKS ONLINE TRAINING

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

The screenshot shows the State Accounting Office website. At the top, there is a navigation bar with links for 'About Us', 'Contact Us', 'Careers', and 'Translate'. Below this is a search bar. The main navigation menu includes 'TeamWorks', 'Statewide Reporting', 'Shared Services', 'Policies and Procedures', 'Travel', 'Training & Calendars', and 'Internal Controls'. The 'Training & Calendars' menu is expanded, showing a list of links: 'Accounting Training and CPE Links', 'State Accounting Office Calendars', 'TeamWorks Training', 'TeamWorks Financials Online Training', 'TeamWorks HCM Online Training', 'TeamWorks Security Online Training', 'Bank Reconciliation Training', 'CVIOG Ledger Recons', and 'Program Based Budgeting'. A red arrow points to the 'TeamWorks Financials Online Training' link. The main content area displays the 'TeamWorks Training' page, which includes a breadcrumb trail 'Home > Training & Calendars > TeamWorks Training' and a list of training resources: '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', 'Program Based Budgeting Presentations', and 'TeamWorks Travel & Expense Training'.



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

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.

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

- [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
11. Asset Management
12. Project Costing
13. Project Costing Integration with Asset Management

State Accounting Office | [Site Map](#) | [Accessibility](#) | [Privacy/Security](#)

<https://sao.georgia.gov/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
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Home » [Training & Calendars](#) » [TeamWorks Training](#) » TeamWorks Financials Online Training

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THE TRAINING CONTENT HOMEPAGE

The next slides focus on the Training Content Outline.

The screenshot shows the homepage for TeamWorks Financials Online Training. At the top left is the SAO State Accounting Office logo. Below it is a search bar and navigation icons. The main content area is split into two panes. The left pane, labeled 'Content Outline', contains a tree view of training topics. The right pane, labeled 'Concept Pane', contains a title and a paragraph of text.

Content Outline:

- Using TeamWorks Financials Online Training
- Using Team Georgia Marketplace
- Introduction to TeamWorks Financials
- TeamWorks Commitment Control
- TeamWorks Purchasing
- TeamWorks Accounts Payable
- TeamWorks Accounts Receivables
- TeamWorks General Ledger
- TeamWorks Labor Distribution
- TeamWorks Supplier
- TeamWorks Customer
- TeamWorks Salary, Travel and Per Diem
- TeamWorks Asset Management
- TeamWorks Project Costing
- TeamWorks Project Costing Integration with Asset Management

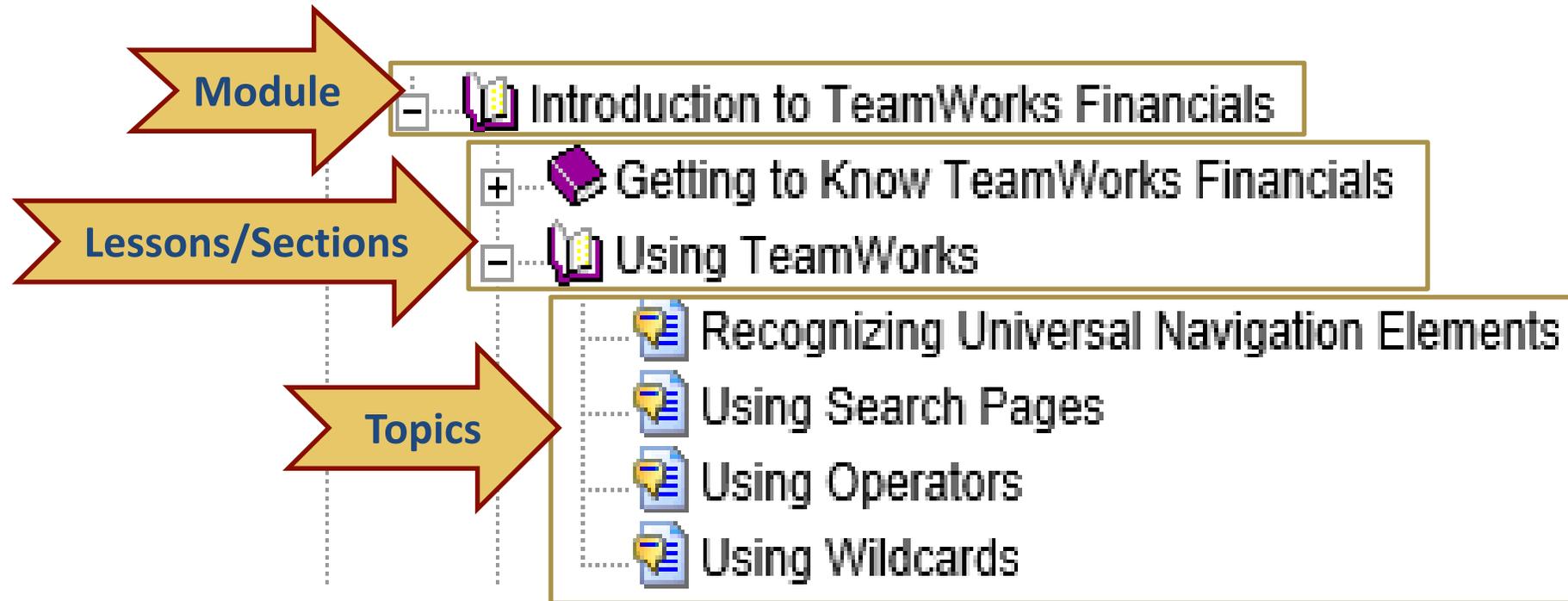
Concept Pane:

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.

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

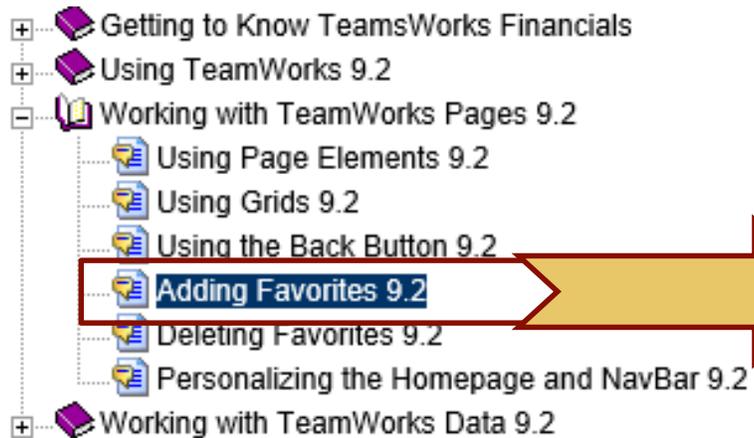
Click the + plus sign   next to the purple books to expand or open the Modules and Sections.

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.



See It! Try It! Print It!

Adding Favorites

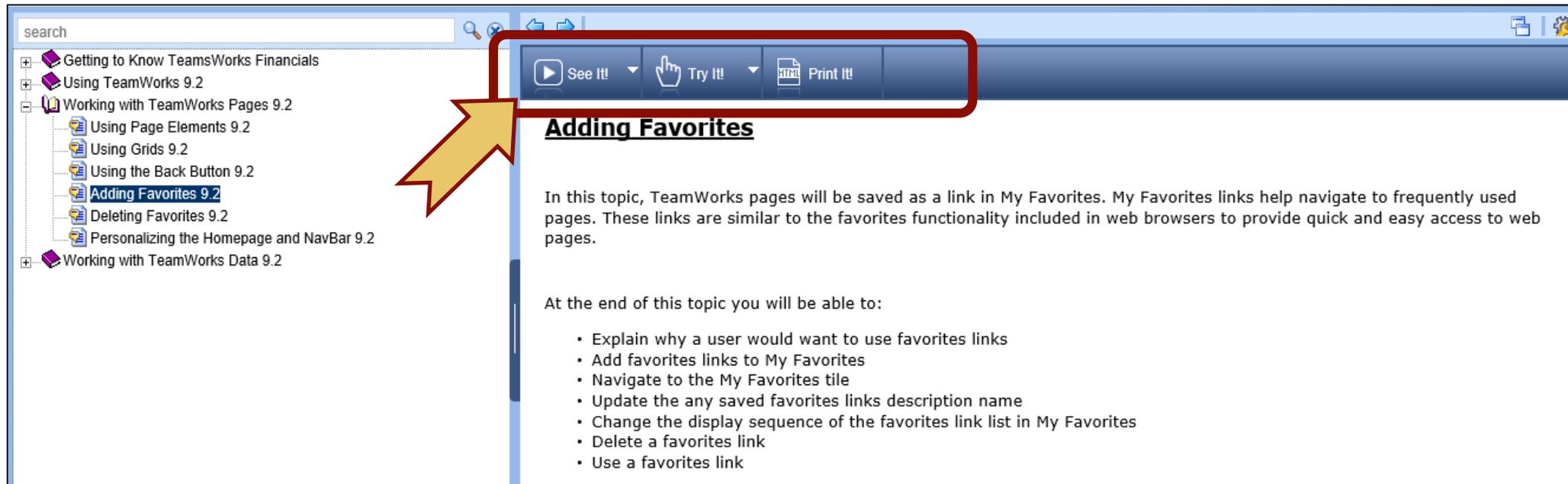
In this topic, TeamWorks pages will be saved as a link in My Favorites. My Favorites links help navigate to frequently used pages. These links are similar to the favorites functionality included in web browsers to provide quick and easy access to web pages.

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

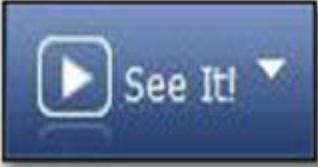
- Explain why a user would want to use favorites links
- Add favorites links to My Favorites
- Navigate to the My Favorites tile
- Update the any saved favorites links description name
- Change the display sequence of the favorites link list in My Favorites
- Delete a favorites link
- Use a favorites link

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 |
|--|---|
|  A blue rectangular button with a white play icon on the left, the text "See It!" in the center, and a small white downward-pointing triangle on the right. | <p>See it! – 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.</p> |
|  A blue rectangular button with a white hand cursor icon on the left, the text "Try It!" in the center, and a small white downward-pointing triangle on the right. | <p>Try it! – 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.</p> |
|  A blue rectangular button with a white document icon on the left, the text "Print It!" in the center, and a small white downward-pointing triangle on the right. | <p>Print it! – 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.</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 training application interface. On the left is a content outline with a search bar at the top. The outline includes the following items:

- Getting to Know TeamsWorks Financials
- Using TeamWorks 9.2
- Working with TeamWorks Pages 9.2
 - Using Page Elements 9.2
 - Using Grids 9.2
 - Using the Back Button 9.2
 - Adding Favorites 9.2** (highlighted with a red box and a mouse cursor)
 - Deleting Favorites 9.2
 - Personalizing the Homepages and NavBar 9.2
- Working with TeamWorks Data 9.2

The main content area on the right displays the selected topic, "Adding Favorites". At the top of this area is a navigation bar with three buttons: "See It!", "Try It!" (highlighted with a red box), and "Print It!". Below the navigation bar is the title "Adding Favorites" and a paragraph of introductory text. At the bottom of the page, there is a list of learning objectives under the heading "At the end of this topic you will be able to:".

- Explain why a user would want to use favorites links
- Add favorites links to My Favorites
- Navigate to the My Favorites tile
- Update the any saved favorites links description name
- Change the display sequence of the favorites link list in My Favorites
- Delete a favorites link
- Use a favorites link

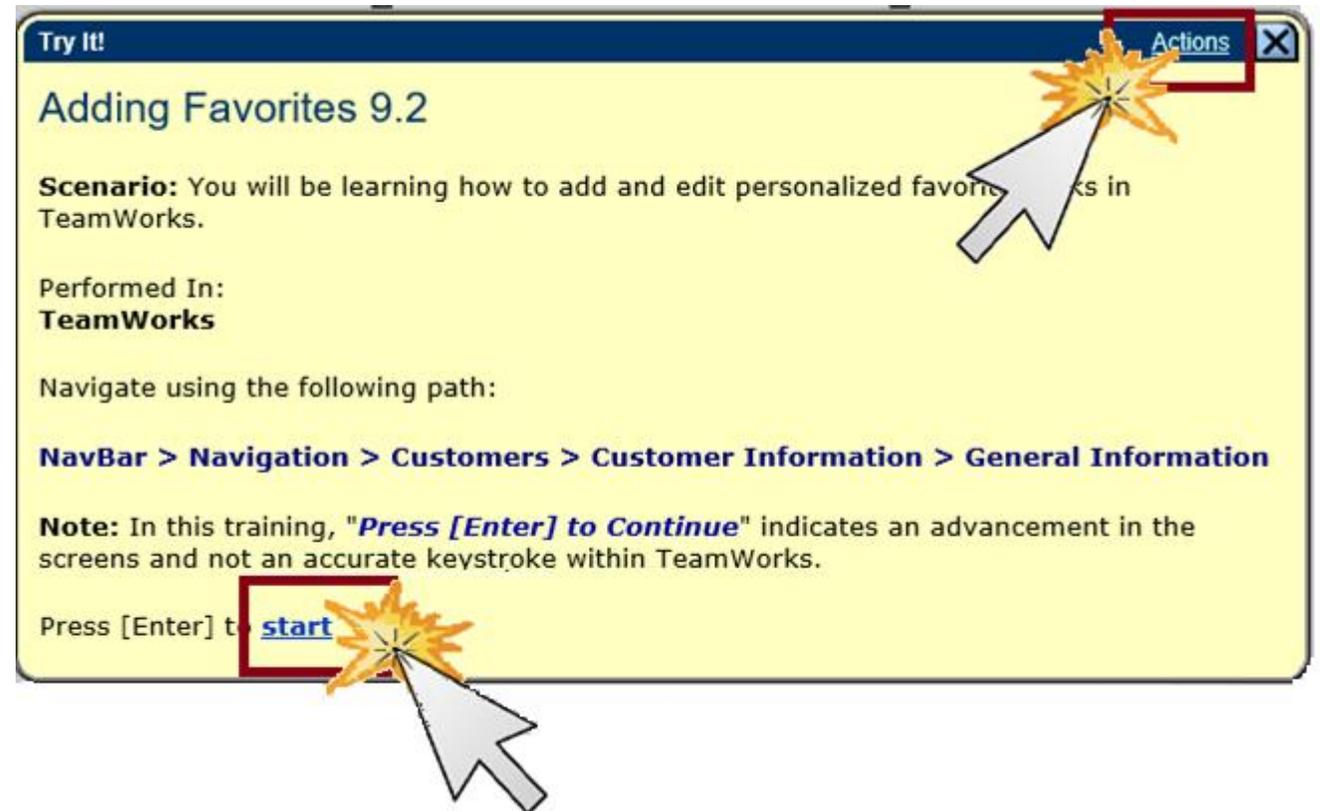


The first time through the training topics, always start at the top and proceed in ascending order.

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.

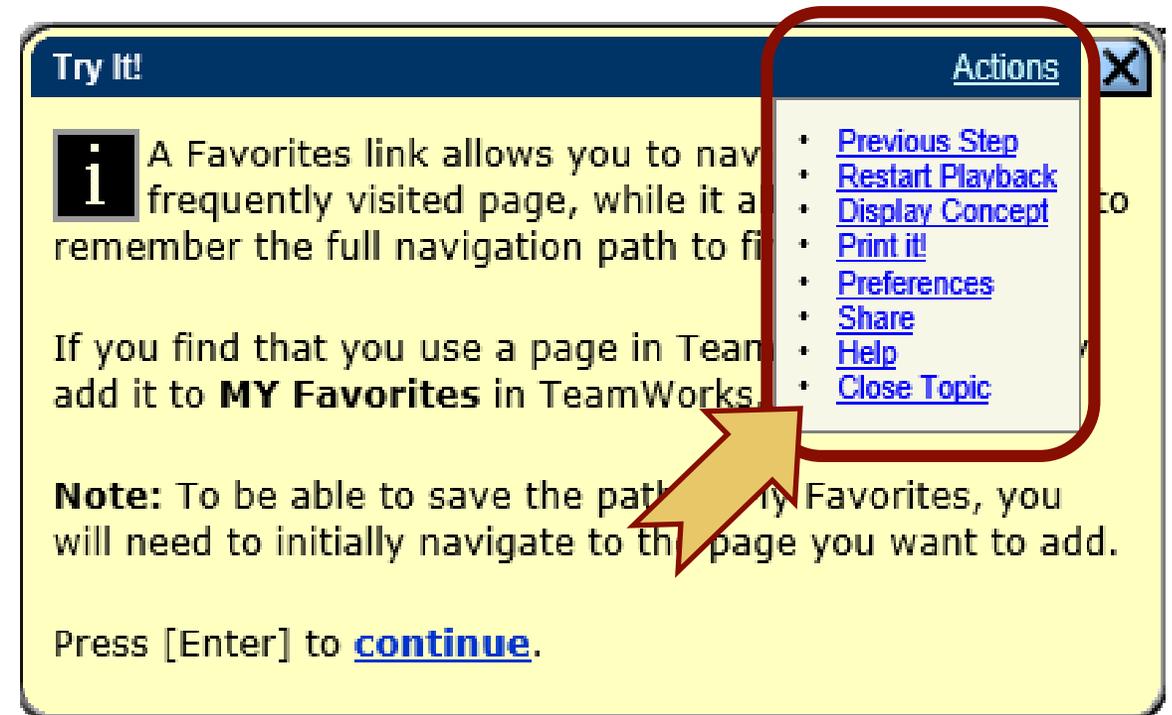
- For this example, the user is playing the simulation in **Try it!** mode. This means the user has to read and follow the prompts to move through the topic.
- In addition, the user can navigate by using the **Actions** menu or by using the on-screen instructions.



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:

- Return to the **Previous Step** or screen
- **Restart Playback** restarts the topic from the beginning
- **Display Concept** pane or topic introduction
- **Print it!** prints the job aid for the topic
- **Close Topic** returns to the topic options



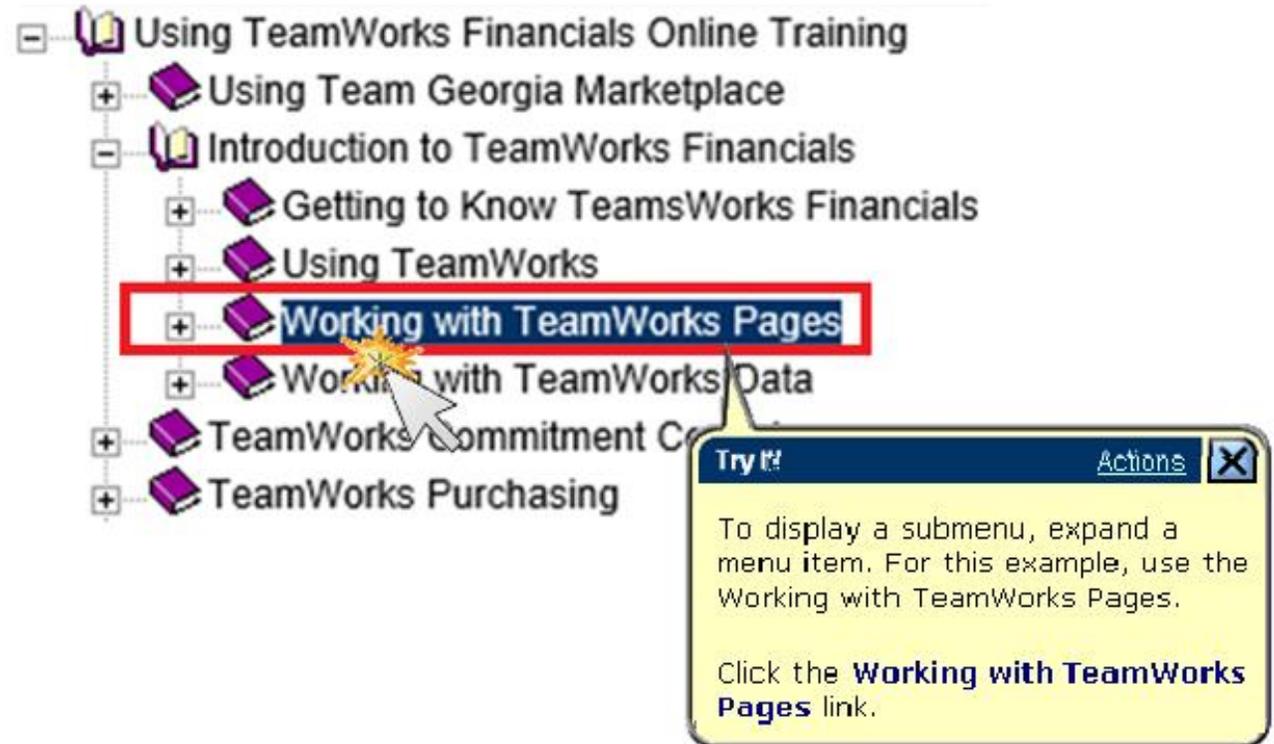
The screenshot shows a yellow information box titled "Try It!" with a blue header bar containing the word "Actions" and a close button (X). The main content area contains an information icon (i) followed by text explaining that a Favorites link allows navigation to frequently visited pages and remembers the full navigation path. Below this, it says "If you find that you use a page in TeamWorks, add it to **MY Favorites** in TeamWorks." A "Note" section states: "Note: To be able to save the path to MY Favorites, you will need to initially navigate to the page you want to add." At the bottom, it says "Press [Enter] to continue." On the right side, a vertical list of actions is displayed, each preceded by a bullet point: "Previous Step", "Restart Playback", "Display Concept", "Print it!", "Preferences", "Share", "Help", and "Close Topic". A red rectangular box highlights the "Actions" menu, and a yellow arrow points from the "Note" section towards the "Close Topic" option.

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 a navigation tree for 'Using TeamWorks Financials Online Training'. The items are:

- Using Team Georgia Marketplace
- Introduction to TeamWorks Financials
 - Getting to Know TeamsWorks Financials
 - Using TeamWorks
 - Working with TeamWorks Pages** (highlighted with a red box and a mouse cursor)
 - Working with TeamWorks Data
- TeamWorks Commitment C...
- TeamWorks Purchasing

A yellow callout box titled 'Try it!' is positioned over the 'Working with TeamWorks Pages' item. It contains the following text:

To display a submenu, expand a menu item. For this example, use the Working with TeamWorks Pages.

Click the **Working with TeamWorks Pages** link.

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/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

