

Using TeamWorks Security 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:

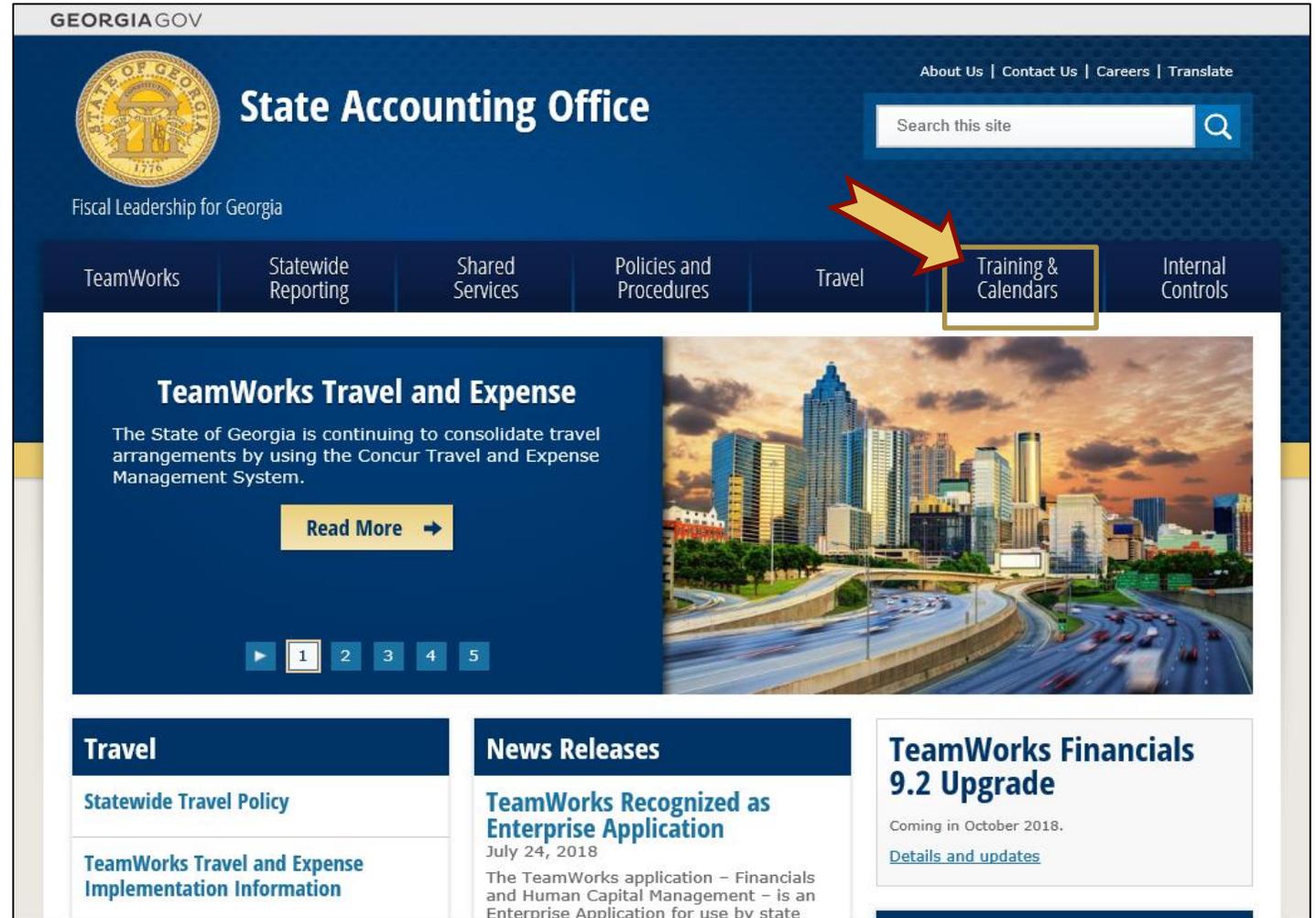
- Navigate to the TeamWorks Online Training homepage
- Navigate a TeamWorks Online Training content page
- Describe the TeamWorks Online Training playback modes
- Select and play a topic
- Navigate a TeamWorks Online Training simulation



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.



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 header with the Georgia state seal and the text "State Accounting Office" and "Fiscal Leadership for Georgia". A search bar is located in the top right corner. Below the header is a navigation menu with links for TeamWorks, Statewide Reporting, Shared Services, Policies and Procedures, Travel, Training & Calendars, and Internal Controls. The "Training & Calendars" link is highlighted. Below the navigation menu, the "Training & Calendars" section is displayed, featuring a left sidebar with links for "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. The main content area displays the heading "Training & Calendars" and a paragraph stating: "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."

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



NAVIGATING TO TEAMWORKS ONLINE TRAINING

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

GEORGIA GOV

State Accounting Office

Fiscal Leadership for Georgia

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

Home » [Training & Calendars](#) » TeamWorks Training

TeamWorks Training

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.

- [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](#)
- [TeamWorks Travel & Expense Training](#)



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

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

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.

Home » [Training & Calendars](#) » [TeamWorks Training](#) » TeamWorks Security Online Training

TeamWorks Security Online Training

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

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

TeamWorks Security Online Training
1. Requesting a New Security Request
2. Requesting a Deletion Security Request
3. Requesting a Change Security Request
4. Reviewing a User Information Tab
5. Reviewing the Activity Security Tab
6. Changing Procurement Security Access
7. Sec Officer: Approving or Rejecting a Request
8. Generating Security Report by User
9. Sec Officer: Resetting Password for Existing User
10. Sec Officer: Locking Account of Terminated User

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

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

ACCESSING TEAMWORKS ONLINE TRAINING

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

1. Requesting a New Security Request
2. Requesting a Deletion Security Request
3. Requesting a Change Security Request
4. Reviewing a User Information Tab
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Home » [Training & Calendars](#) » [TeamWorks Training](#) » TeamWorks Security Online Training

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

THE TRAINING CONTENT HOMEPAGE



The next slides focus on the Training Content Outline.

search

Share

Getting to Know Financials Security

- Requesting a New Security Request
- Requesting a Deletion Security Request
- Requesting a Change Security Request
- Reviewing the User Information Tab
- Reviewing the Activity Security Tab
- Changing Procurement Security Access
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Getting to Know Financials Security

This module focuses on having the user become familiar with TeamWorks Financials Security Requests.

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

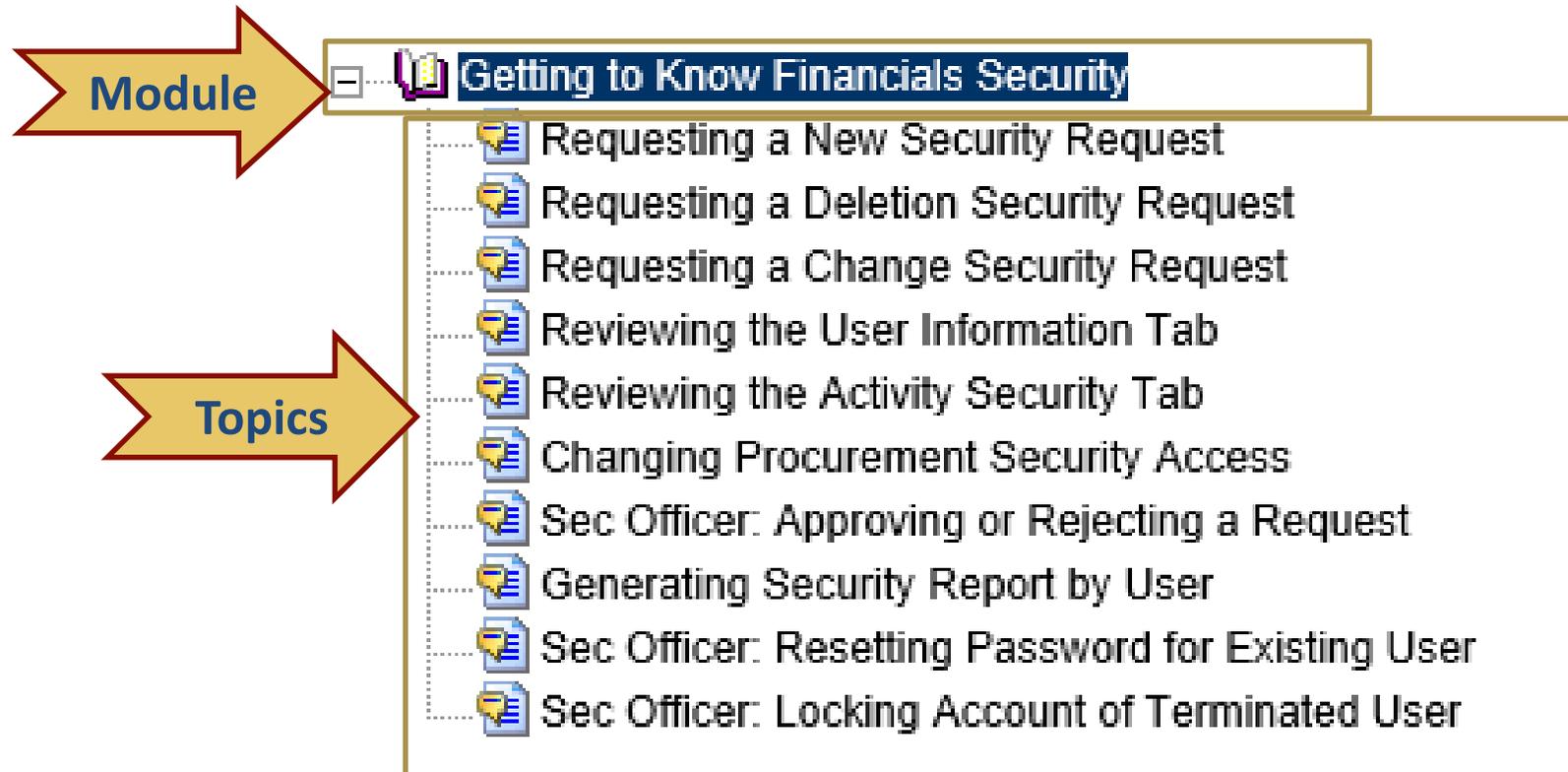
- Perform Manager Function to create a Security Request to Add, Change or Delete security access.
- Navigate the Activity Security Tab
- Navigate the User Information Tab
- Navigate the Procurement Security Tab
- Submit new security request to Agency Security Officer

Content Outline

Concept Pane

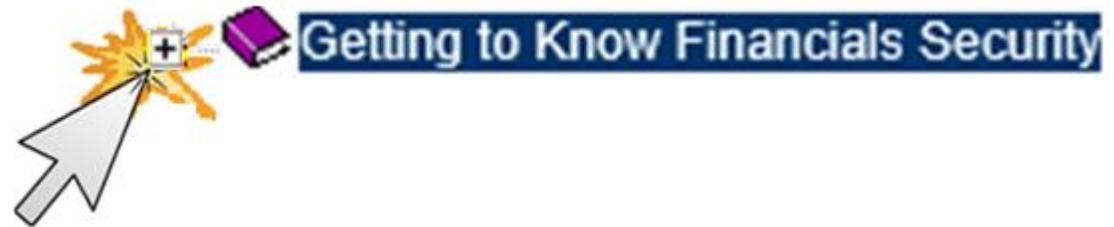
THE CONTENT OUTLINE

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



THE CONTENT OUTLINE

Click the + plus sign   next to the purple books to expand or open the Module.



Click the – minus sign   next to the purple book to collapse or close the Module.



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.

Getting to Know Financials Security

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See It! Try It! Print It!

Reviewing the User Information Tab

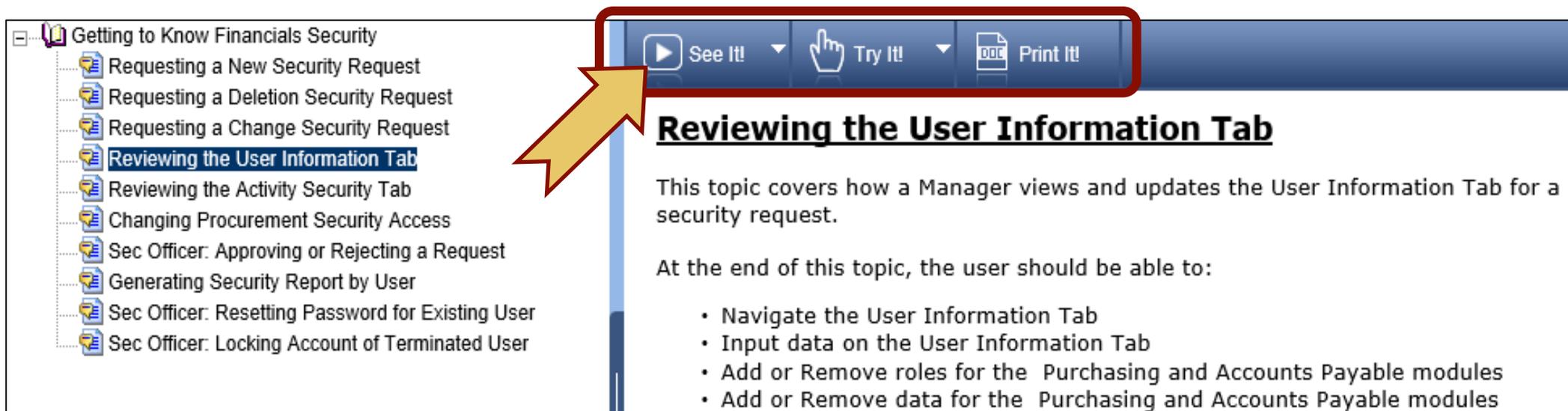
This topic covers how a Manager views and updates the User Information Tab for a security request.

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

- Navigate the User Information Tab
- Input data on the User Information Tab
- Add or Remove roles for the Purchasing and Accounts Payable modules
- Add or Remove data for the Purchasing and Accounts Payable modules

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.



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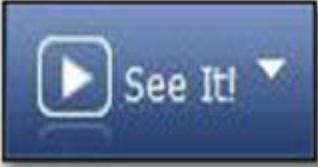
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- Add or Remove data for the Purchasing and Accounts Payable modules

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 interface with a search bar at the top left. Below it is a list of topics under the heading "Getting to Know Financials Security". The topic "Requesting a New Security Request" is highlighted with a red box and a mouse cursor. To the right of the list is a detail pane for the selected topic. The detail pane has a navigation bar with buttons for "See It!", "Try It!", and "Print It!". The "Try It!" button is highlighted with a red box and a mouse cursor. Below the navigation bar is the title "Requesting a new Security Request" and a description: "This topic covers how a Manager requests an addition to security access in the TeamWorks Financials Security environment." Below the description is a list of learning objectives: "At the end of this topic, the user should be able to: Create a new Security Request for additional access for employees or contractors".



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.

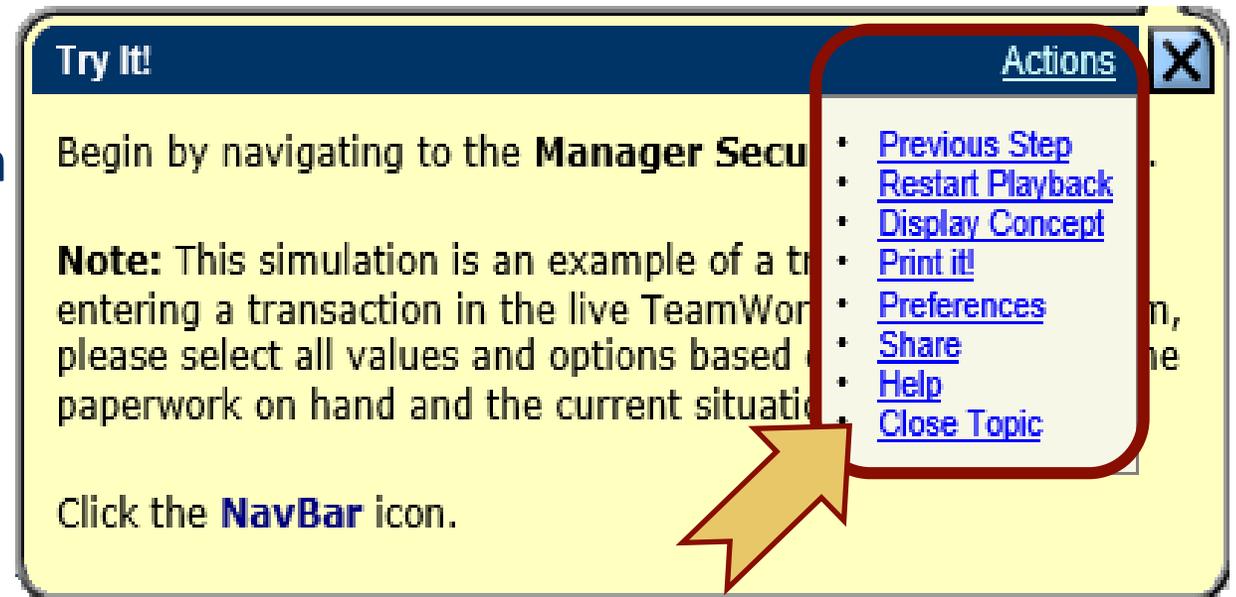
- For this example, the user is playing the simulation in **Try it!** mode. This means the user has to read and follow the prompts to move through the topic.
- In addition, the user can navigate by using the **Actions** menu or by using the on-screen instructions.



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



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.

Manager Security Request

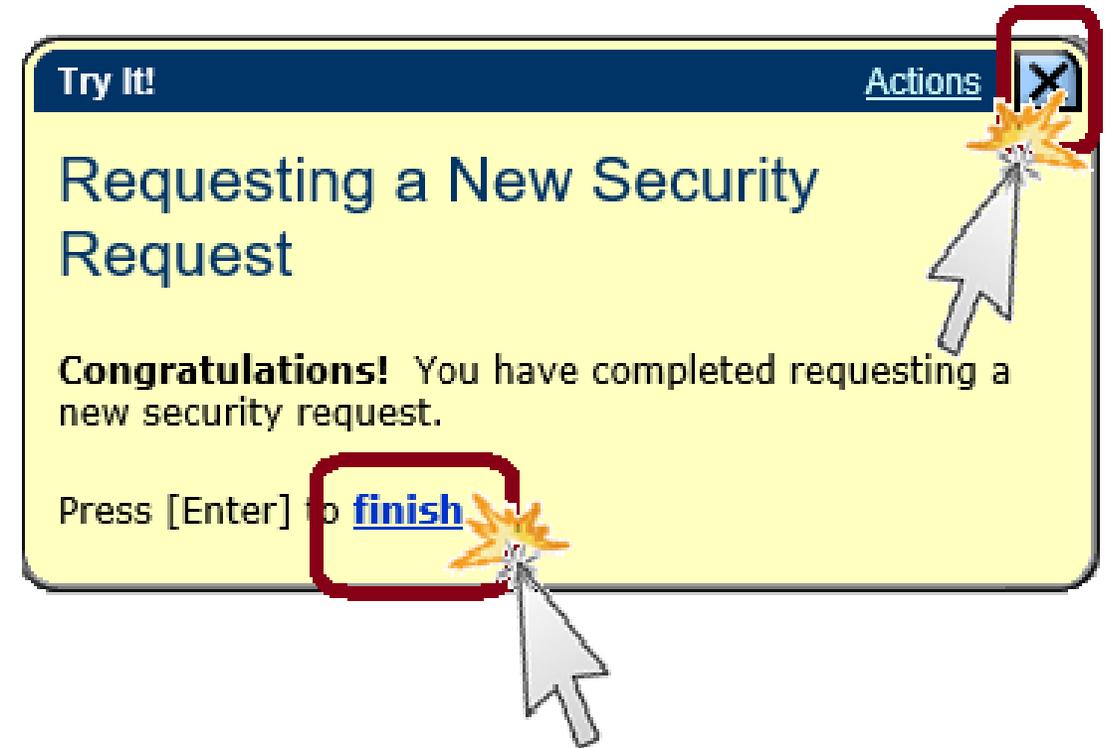
The screenshot shows a web form titled "Manager Security Request". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these is a "Business Unit" input field, which is highlighted with a red box and a yellow starburst icon. A mouse cursor is pointing at the starburst. Below the "Business Unit" field is a "Request ID" field with the text "NEXT" next to it. To the left of the "Business Unit" field is an "Add" button. Below the "Request ID" field is another "Find an Existing Value" button. A yellow callout box titled "Try It!" is overlaid on the "Business Unit" field. The callout box contains the following text: "This is an example. Be sure to input the Business Unit specific to your Agency. For this example Business Unit 40600 will be used." Below this, it says "Enter the appropriate information into the **Business Unit** field." and "For this example, type **40600**." At the bottom right of the callout box is a "Typing Complete" button. The callout box also has a title bar with "Try It!" and "Actions" and a close button (X).

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

