



State Accounting Office  
of Georgia  
Fiscal Leadership for Georgia

# 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 you to learn how to use the TeamWorks application at your workstation, working at your own pace, and at a time that fits in your work schedule.



# Objectives

At the end of this presentation you 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.

[SAO Homepage](#)

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



georgia.gov™ Official Portal for the State of Georgia

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**Quick Links**

- [HCM 9.1 Delta Documents](#)
- [2011 SAO/OPB Combined Calendar](#)
- [Employee Travel Expense Statement](#)
- [News by Categories](#)
- [IRS 3 Percent Withholding Requirement](#)
- [SAO Partnership Contacts](#)
- [Vendor Management](#)
- [Document Direct Naming Conventions !\[\]\(7a0fb7023d4295beb26eef39822a5ef1\_img.jpg\)](#)
- [Comprehensive Annual Financial Report \(CAFR\)](#)
- [Budgetary Compliance](#)

**News **

11/02/2011 [State of Georgia Travel Policy Memo](#)

Please find attached the State of Georgia Travel and Expense Policy document draft for review and comment.

09/30/2011 [PeopleSoft HCM Upgrade 10/7 - 10/11](#)

The State Accounting Office has been working diligently on the PeopleSoft HCM version 9.1 upgrade for the State of Georgia's PeopleSoft technology.

[All News >>](#)

Search   
[Advanced Search](#)

**SAO Calendar**  
November 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	Nov 1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26

# Navigating to TeamWorks Online Training

You should arrive at the SAO Training homepage, or to save time the next time, you can click the button below.

[\*\*SAO TeamWorks  
Online Training\*\*](#)



Don't forget to save it as a Favorite!

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



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**Training**

Accounting Training and CPE Links

TeamWorks Financials

TeamWorks HCM

Salary and Travel Job Aids

Streamlined Banking

Year-End Reporting Training

This section contains information related to online and classroom training for systems and financial reporting owned by SAO. The systems include Financial Systems, Human Capital Management Systems and Streamlined Banking. Beginning with the reporting for FY2009, SAO is working with the University of Georgia, Carl Vinson Institute of Government on both online and classroom training for year-end forms.

[Accounting Training and CPE Links](#)  
Accounting Training and Continuing Professional Education(CPE)Links

[TeamWorks Financials](#)  
TeamWorks Financials Online Training

[TeamWorks HCM](#)  
TeamWorks HCM Online Training

# Accessing TeamWorks Online Training

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



The screenshot shows the official portal for the State of Georgia. The header includes the Georgia seal and the text "State Accounting Office of Georgia Fiscal Leadership for Georgia". A navigation menu contains links for "About Us", "Systems", "Reporting", "Policies", "Training", "Travel", "Tools", and "News". The "Training" link is highlighted. Below the menu, a breadcrumb trail reads "Home > Training > TeamWorks Financials". A search bar is located in the top right corner. The main content area is titled "TeamWorks Financials" and lists several training options:

- [Accounting Training and CPE Links](#)
- [TeamWorks Financials](#)
- [Bank Reconciliation Training](#)
- [CVIOG Ledger Recons](#)
- [TeamWorks Financials Online Training](#)
- [Program Based Budgeting Presentations](#)
- [TeamWorks HCM](#)
- [Salary and Travel Job Aids](#)

On the right side of the main content area, there are additional links:

- [Bank Reconciliation Training](#)
- [Bank Reconciliation Training](#)
- [CVIOG Ledger Recons](#)
- [Carl Vinson Institute of Government Ledger Recons](#)
- [TeamWorks Financials Online Training](#)
- [TeamWorks Financials Online Training](#)
- [Program Based Budgeting Presentations](#)
- [Program Based Budgeting Presentations](#)

A mouse cursor is pointing at the "TeamWorks Financials Online Training" link in the second column.

# Accessing TeamWorks Online Training

You should arrive at the  
**TeamWorks Financials  
Online Training** page.



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  - TeamWorks Financials Online Training**
  - Program Based Budgeting Presentations
- TeamWorks HCM
- Salary and Travel Job Aids
- Streamlined Banking
- Year-End Reporting Training

Home > Training > TeamWorks Financials > TeamWorks Financials Online Training

Search  GO  
[Advanced Search](#)

## TeamWorks Financials Online Training

TeamWorks Financials Online Training allows any user to take training online at their convenience. TeamWorks Financials Online Training is accessible independently, users do not need to be logged into TeamWorks Financials.

Use the links below to take TeamWorks Financials Online Training or to access the Teamworks Financials Online Training.

- [Taking TeamWorks Financials Online Training](#)
- [OnDemand Website for Financials Training](#)
- [TeamWorks Financials Online Training - Project Costing to Asset Management Training](#)



# TeamWorks Online Training Technical Requirements

Before accessing TeamWorks Online Training verify your browser.

## Verify you are using Internet Explorer version 6 or higher

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



# Accessing TeamWorks Online Training

To access the complete older training content click the **OnDemand website for Financials Training** link.

To access the newer training content click the **TeamWorks Financials Online Training** link.



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Home > Training > TeamWorks Financials > TeamWorks Financials Online Training

**TeamWorks Financials Online Training**

Search  GO  
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# The Training Content Homepage

IE Browser

The screenshot shows a Windows Internet Explorer browser window. The address bar displays 'http://localhost:1421/toc0.html'. The browser's address bar contains 'UPK - Employee Self-Service'. The page content includes a search bar, a navigation pane on the left with a link to 'Using Employee Self-Service', and a main content area titled 'Using Employee Self-Service'. The main content area contains a paragraph of text and a bulleted list of tasks. Two yellow callout boxes are overlaid on the screenshot: 'Content Outline' points to the left navigation pane, and 'Concept Pane' points to the main content area.

search

Using Employee Self-Service

### 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

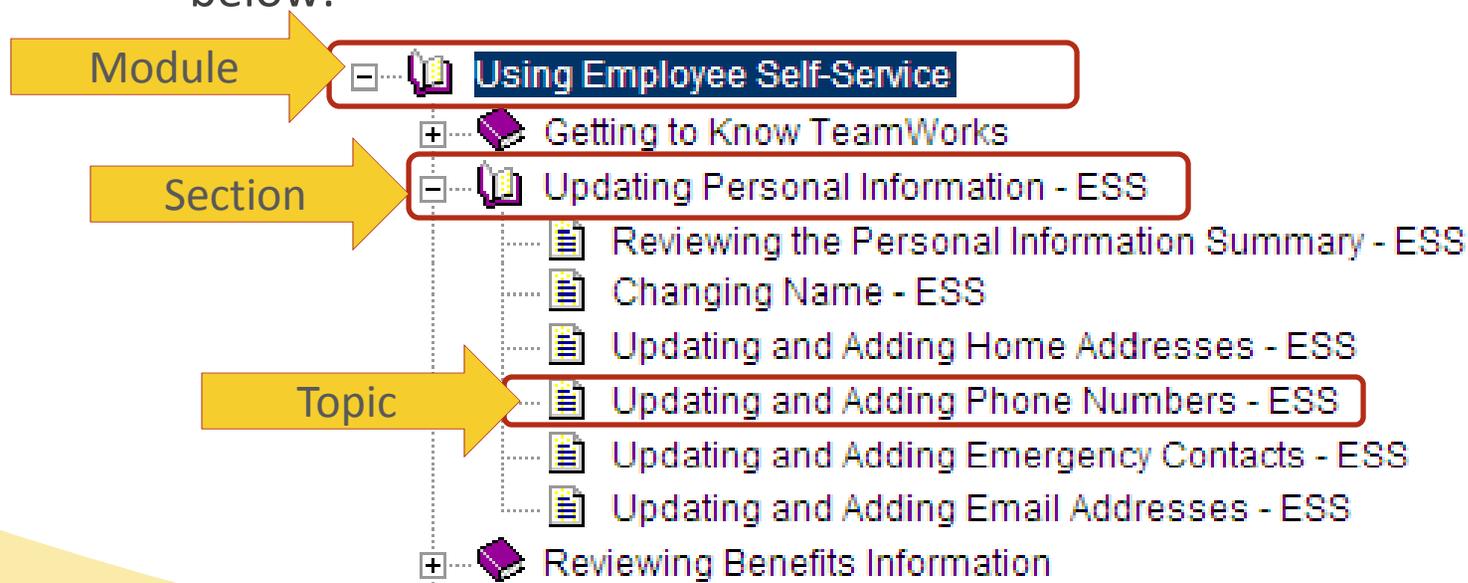
Content Outline

Concept Pane

The next few slides focus on the Content Outline.

# The Content Outline

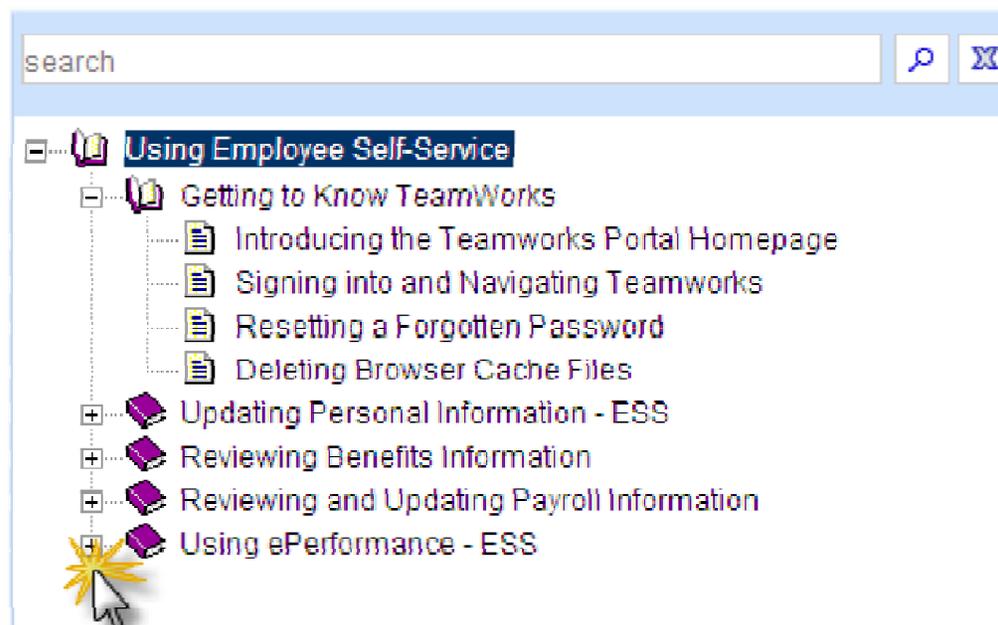
The TeamWorks Online Training player is organized into a folder hierarchy. The course outlines are structured as shown below:



# The Content Outline

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

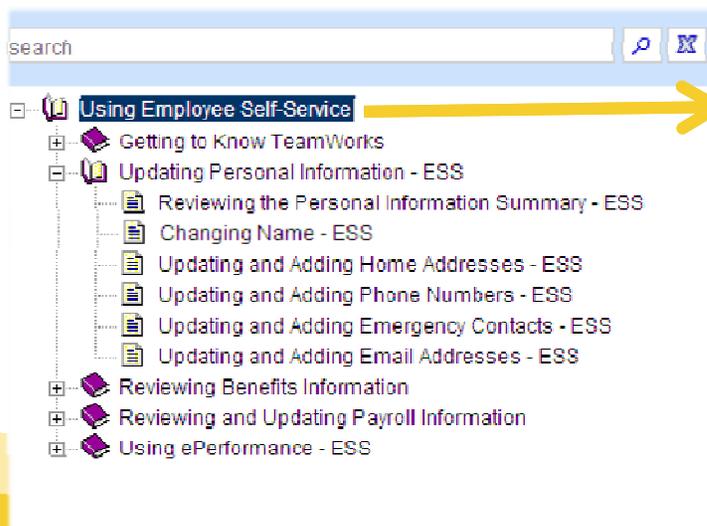
To collapse the modules and sections, click the – next to the purple books   .





# 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.



## **Using Employee Self-Service**

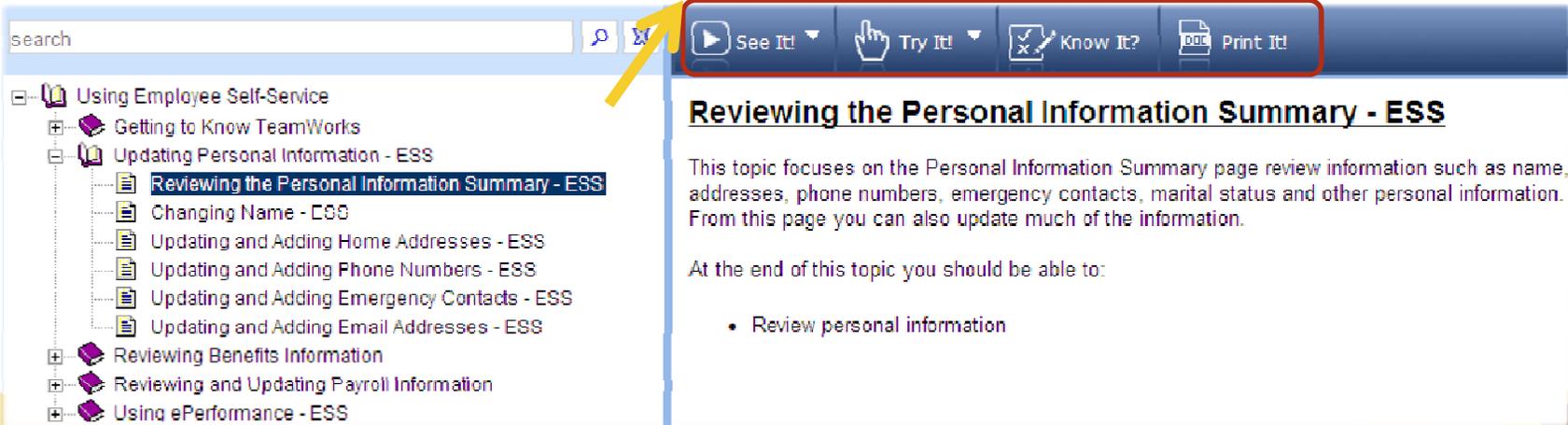
Employees use TeamWorks Self-Service module to review, add, update, or delete personal information. Users can access each transaction individually or use the Personal Information Summary page to review all personal information at once. The buttons on the Personal Information Summary page provide quick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



The screenshot displays a training interface with a search bar at the top left. Below the search bar is a tree view of topics. The selected topic, "Reviewing the Personal Information Summary - ESS", is highlighted. To the right of the tree view is a Concept Pane. At the top of the Concept Pane is a navigation bar with four buttons: "See It!" (with a play icon), "Try It!" (with a hand icon), "Know It?" (with a checkmark icon), and "Print It!" (with a document icon). Below the navigation bar is the title "Reviewing the Personal Information Summary - ESS" and a paragraph of text: "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." Below the paragraph is the text "At the end of this topic you should be able to:" followed by a bulleted list: "• Review personal information".

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

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

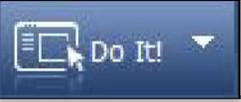
## Reviewing the Personal Information Summary - ESS

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:

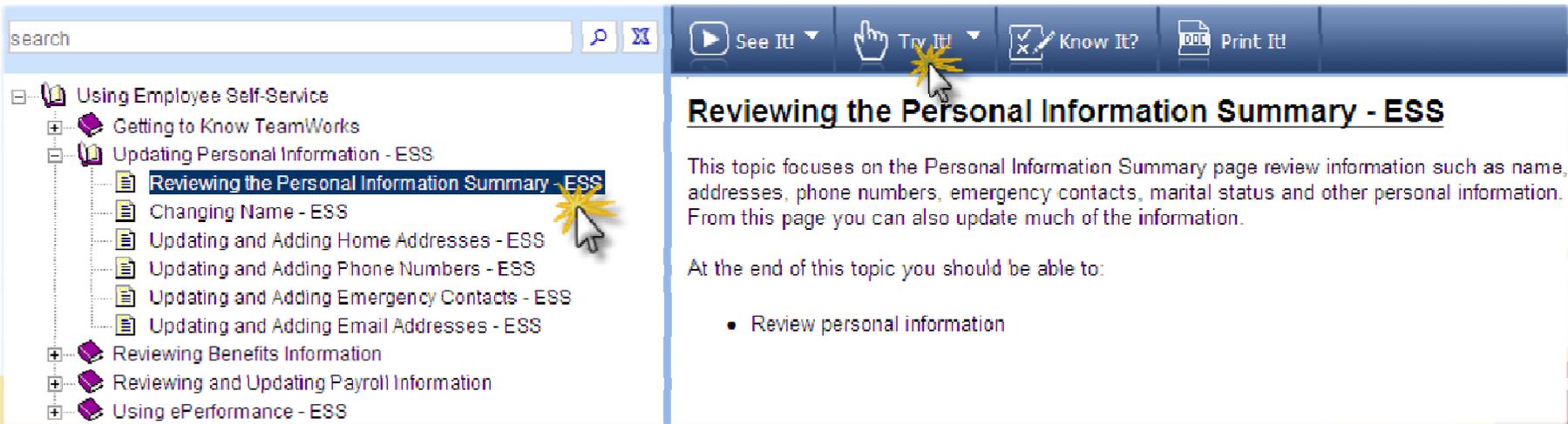
- Review personal information

# Playback Modes

Button	Description
	<b>See It!</b> – 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.
	<b>Try It</b> – 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.
	<b>Know It?</b> – 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.
	<b>Do It!</b> – Clicking this button launches the topic in Do It! mode. It guides the user as they perform the tasks in the live TeamWorks environment.
	<b>Print It!</b> – 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.

# 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.



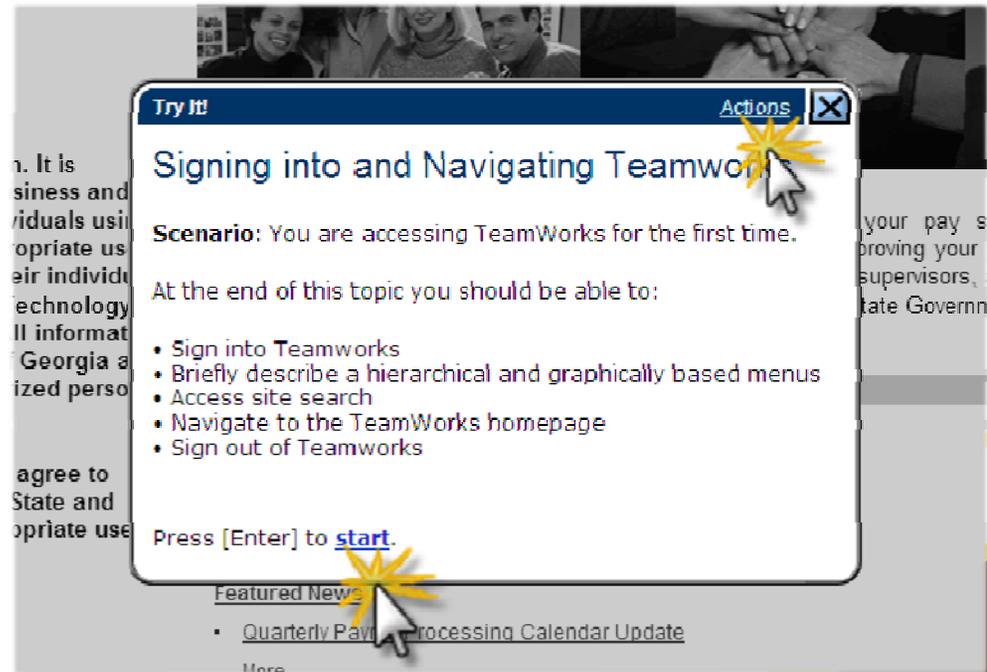
The screenshot shows a software interface with a search bar at the top left. Below it is a tree view of topics. The selected topic is "Reviewing the Personal Information Summary - ESS". To the right of the tree view is a playback control bar with buttons for "See It", "Try It", "Know It?", and "Print It". The "Try It" button is highlighted with a mouse cursor. The main content area displays the title "Reviewing the Personal Information Summary - ESS" and a paragraph of text: "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." Below this is a section titled "At the end of this topic you should be able to:" followed by a bullet point: "Review personal information".



Always take the training  
order 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.



**Try It!** Actions X

## Signing into and Navigating Teamworks

**Scenario:** You are accessing TeamWorks for the first time.

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

- Sign into Teamworks
- Briefly describe a hierarchical and graphically based menus
- Access site search
- Navigate to the TeamWorks homepage
- Sign out of Teamworks

Press [Enter] to **start**.

Featured News

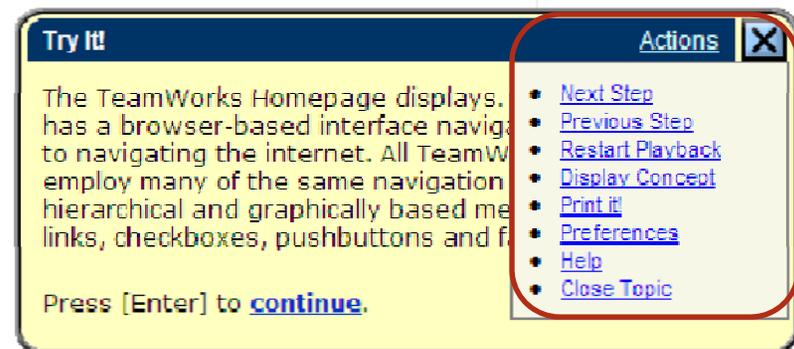
- Quarterly Payroll Processing Calendar Update

More

# Navigating a TeamWorks Online Training Simulation

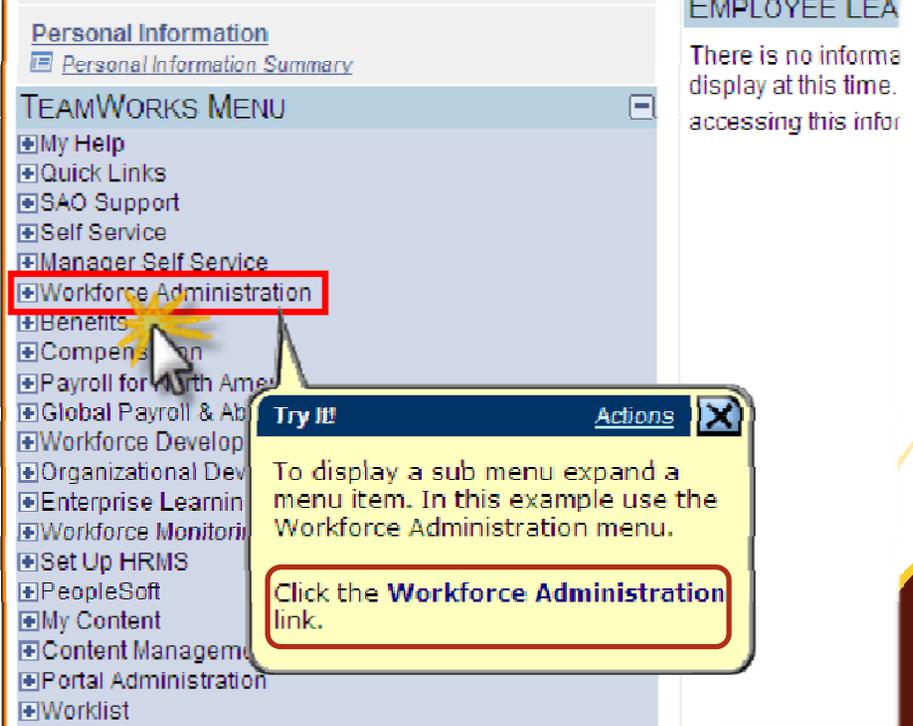
After the user clicks the **Action** link the TeamWorks Online Training player displays a small menu that includes key actions such as:

- 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.



**EMPLOYEE LEA**  
There is no informa  
display at this time.  
accessing this infor

**Try It!** Actions X

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

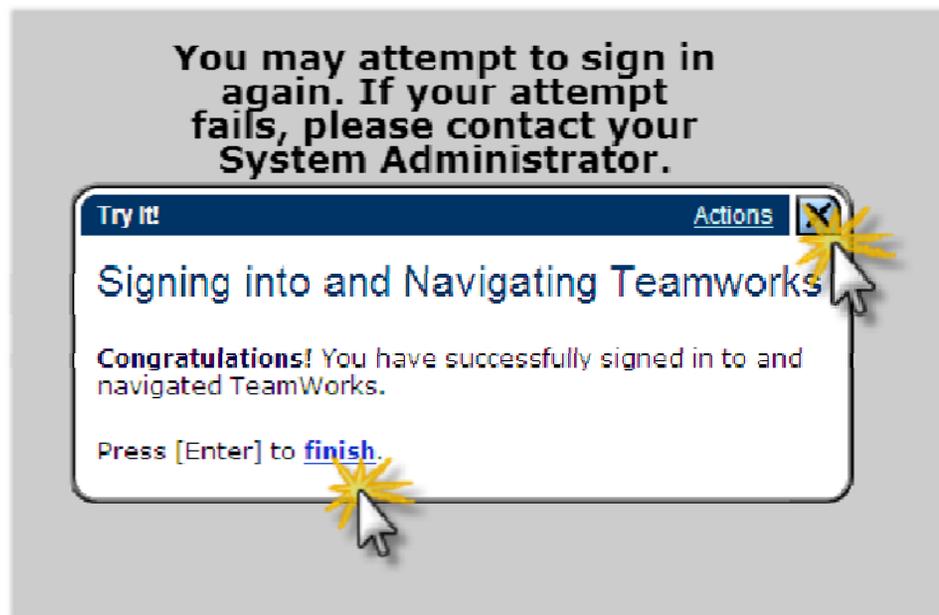
Click the **Workforce Administration** link.

# 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/00/channel\\_createdate/0,2095,39779022\\_138756149,00.html](http://sao.georgia.gov/00/channel_createdate/0,2095,39779022_138756149,00.html)

SAO TeamWorks Online  
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

**DONE!**