



SAO

State Accounting Office

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

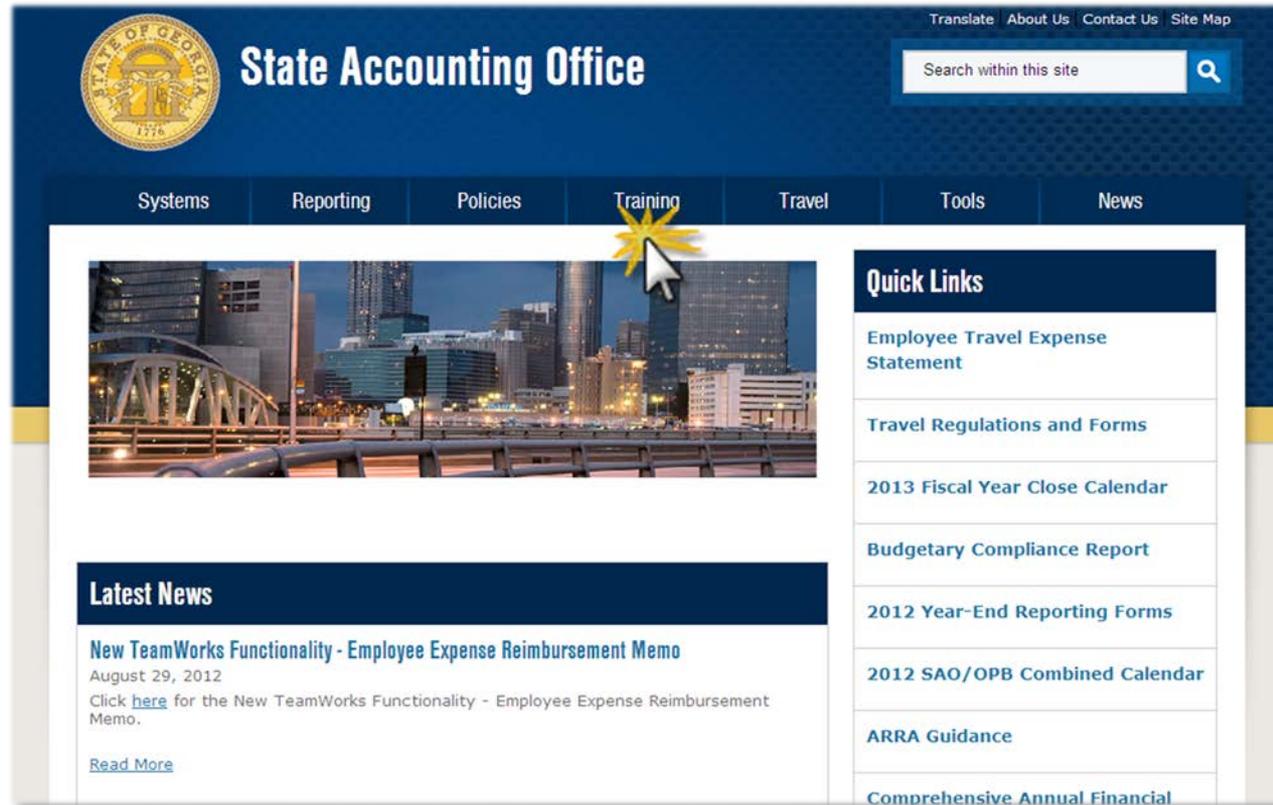


Navigating to TeamWorks Online Training

TeamWorks Online Training is located on the SAO Website.

[SAO Homepage](#)

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



The screenshot shows the State Accounting Office website homepage. At the top left is the SAO logo and the text "State Accounting Office". To the right is a search bar with the text "Search within this site" and a magnifying glass icon. Below the header is a navigation menu with links for "Systems", "Reporting", "Policies", "Training", "Travel", "Tools", and "News". The "Training" link is highlighted with a yellow starburst and a mouse cursor. Below the navigation menu is a large image of a city skyline at night. To the right of the image is a "Quick Links" section with several links: "Employee Travel Expense Statement", "Travel Regulations and Forms", "2013 Fiscal Year Close Calendar", "Budgetary Compliance Report", "2012 Year-End Reporting Forms", "2012 SAO/OPB Combined Calendar", "ARRA Guidance", and "Comprehensive Annual Financial". Below the image is a "Latest News" section with a link to "New TeamWorks Functionality - Employee Expense Reimbursement Memo" dated August 29, 2012, and a "Read More" link.

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!

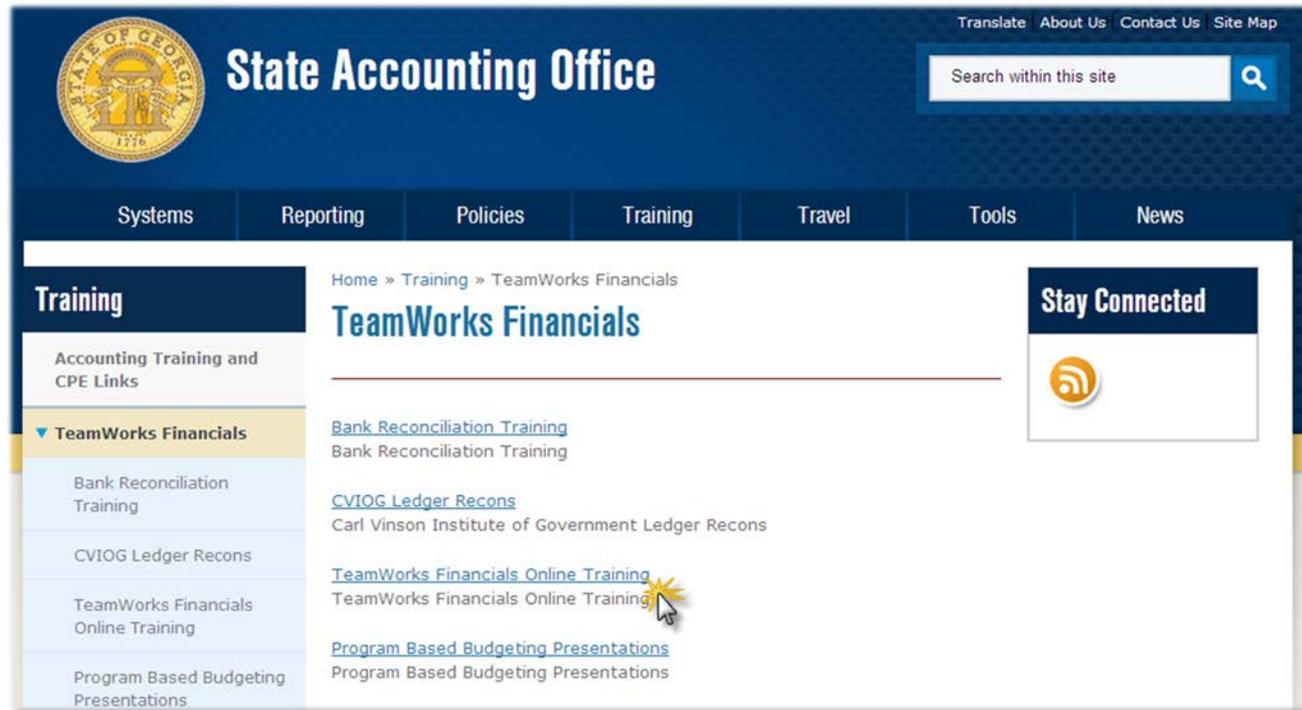
To take TeamWorks Financials Online training, click the **TeamWorks Financials** link.



The screenshot shows the SAO Training homepage. At the top left is the State of Georgia seal. The main header reads "State Accounting Office". To the right is a search bar with the text "Search within this site" and a magnifying glass icon. Below the header is a navigation menu with links for "Systems", "Reporting", "Policies", "Training", "Travel", "Tools", and "News". The "Training" link is highlighted. On the left side, there is a "Training" sidebar menu with the following items: "Accounting Training and CPE Links", "TeamWorks Financials" (with a mouse cursor pointing to it), "TeamWorks HCM", "Salary and Travel Job Aids", "Streamlined Banking", and "Year-End Reporting Training". The main content area shows the breadcrumb "Home » Training" and the heading "Training". Below this is a paragraph of text: "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." On the right side, there is a "Stay Connected" section with an RSS feed icon.

Accessing TeamWorks Online Training

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



The screenshot shows the State Accounting Office website. The header includes the state seal, the text "State Accounting Office", and navigation links for "Translate", "About Us", "Contact Us", and "Site Map". A search bar is located in the top right corner. Below the header is a navigation menu with tabs for "Systems", "Reporting", "Policies", "Training", "Travel", "Tools", and "News". The "Training" tab is selected, and a sub-menu is displayed on the left. The sub-menu includes "Accounting Training and CPE Links" and "TeamWorks Financials". Under "TeamWorks Financials", the link "TeamWorks Financials Online Training" is highlighted with a yellow mouse cursor. The main content area shows the breadcrumb "Home » Training » TeamWorks Financials" and the heading "TeamWorks Financials". Below this heading are several links: "Bank Reconciliation Training", "CVIOG Ledger Recons", "TeamWorks Financials Online Training" (highlighted), and "Program Based Budgeting Presentations". A "Stay Connected" sidebar on the right contains an RSS feed icon.

Accessing TeamWorks Online Training

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



The screenshot shows the State Accounting Office website. The header includes the SAO logo, the text "State Accounting Office", and navigation links for "Translate", "About Us", "Contact Us", and "Site Map". A search bar is located in the top right corner. The main navigation menu includes "Systems", "Reporting", "Policies", "Training", "Travel", "Tools", and "News". The "Training" section is expanded, showing a list of training options: "Accounting Training and CPE Links", "TeamWorks Financials", "Bank Reconciliation Training", "CVIOG Ledger Recons", "TeamWorks Financials Online Training", and "Program Based Budgeting Presentations". The "TeamWorks Financials Online Training" page is displayed, featuring a breadcrumb trail: "Home » Training » TeamWorks Financials » TeamWorks Financials Online Training". The page title is "TeamWorks Financials Online Training". The main content area explains that TeamWorks Financials Online Training allows users to take training online at their convenience and is accessible independently. It provides three links: "Taking TeamWorks Financials Online Training", "OnDemand Website for Financials Training", and "TeamWorks Financials Online Training - Project Costing to Asset Management Training". A "Stay Connected" section with an RSS icon is visible on the right side of the page.

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.



The screenshot shows the State Accounting Office website. The header includes the state seal, the text "State Accounting Office", and navigation links for "Translate", "About Us", "Contact Us", and "Site Map". A search bar is located in the top right corner. The main navigation menu includes "Systems", "Reporting", "Policies", "Training", "Travel", "Tools", and "News". The "Training" section is expanded, showing "Accounting Training and CPE Links" and "TeamWorks Financials". Under "TeamWorks Financials", there are links for "Bank Reconciliation Training", "CVIOG Ledger Recons", "TeamWorks Financials Online Training", and "Program Based Budgeting Presentations". The "TeamWorks Financials Online Training" link is highlighted. The main content area displays the breadcrumb "Home » Training » TeamWorks Financials » TeamWorks Financials Online Training" and the title "TeamWorks Financials Online Training". The text explains that this training allows users to take training online at their convenience and is accessible independently. It provides links to "Taking TeamWorks Financials Online Training", "OnDemand Website for Financials Training", and "TeamWorks Financials Online Training - Project Costing to Asset Management Training". A "Stay Connected" section with an RSS icon is also visible.

The Training Content Homepage

IE Browser

UPK - Employee Self-Service - Windows Internet Explorer

http://localhost:1421/toc0.html

Links Welcome to TeamWorks georgia.gov - Training Covendis - Login

UPK - Employee Self-Service

State Accounting Office
Georgia
Oracle

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

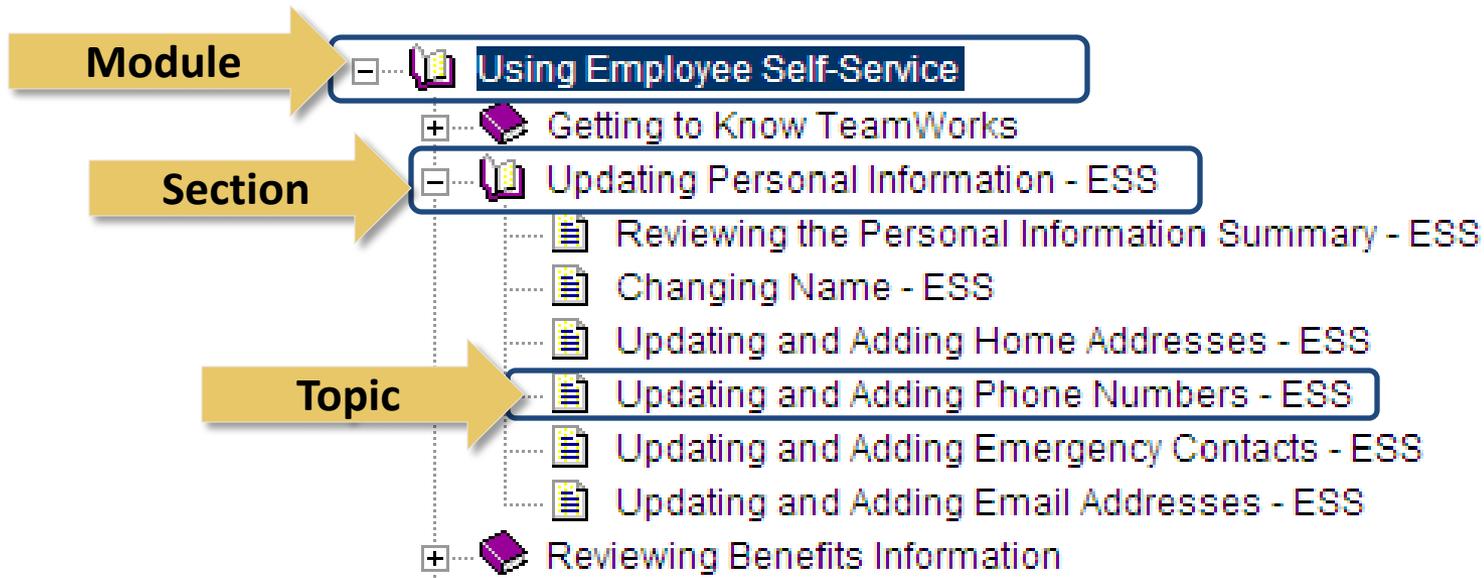
Content Outline

Concept Pane

The next few slides focus on the Content Outline.

The Content Outline

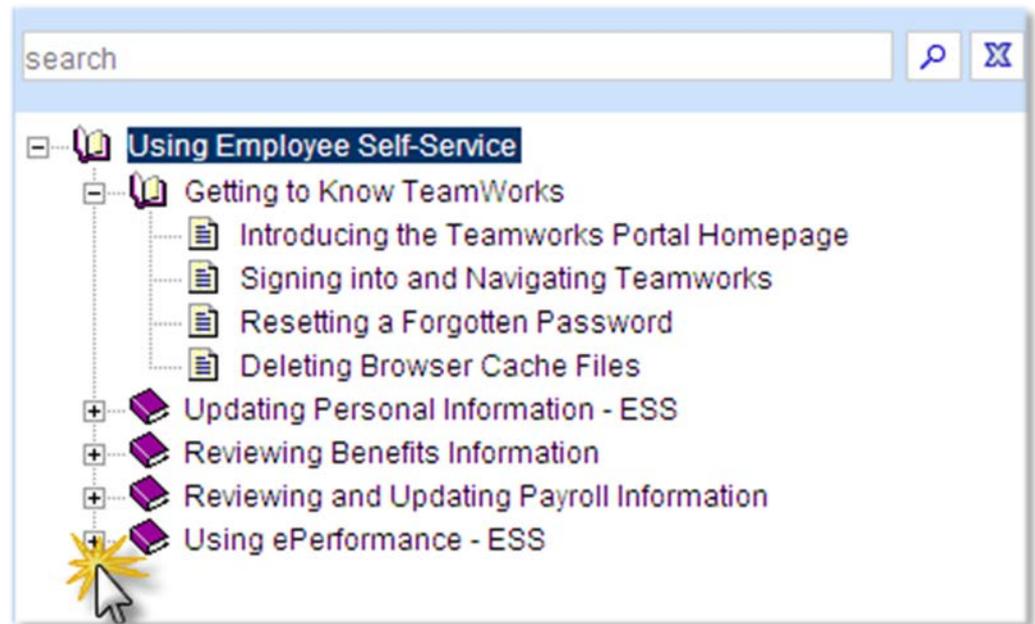
The TeamWorks Online Training player is organized into a folder hierarchy. The course outlines are structured as shown below:



The Content Outline

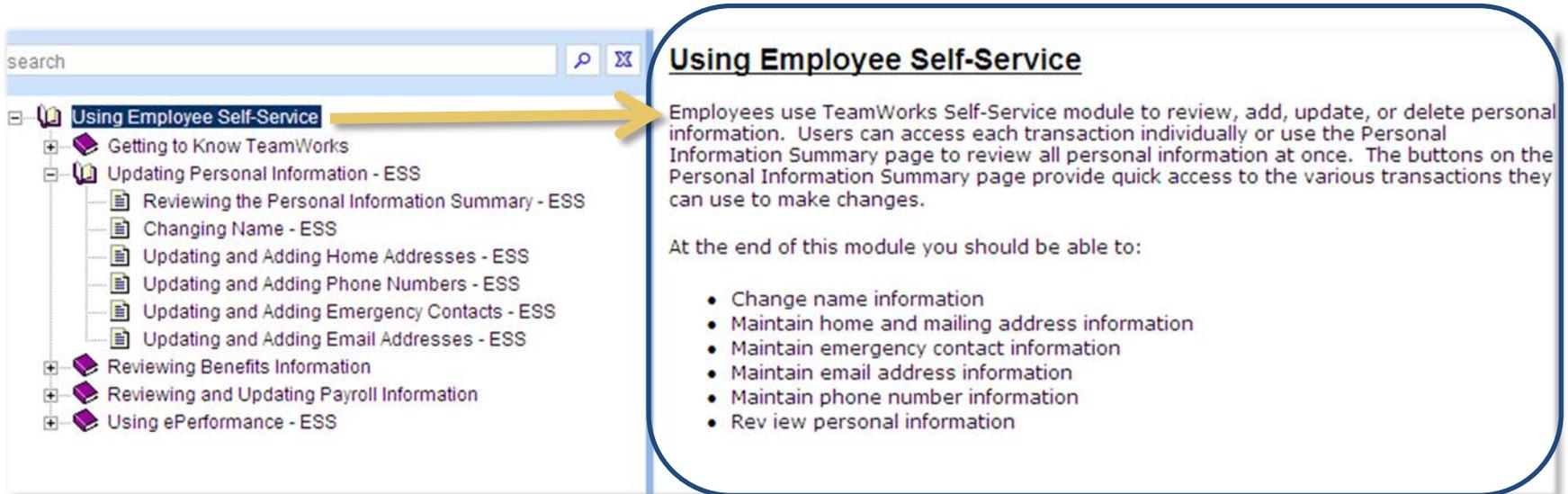
To expand the modules and sections, click the + next to the purple books   . This expands the content.

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.



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

Using Employee Self-Service

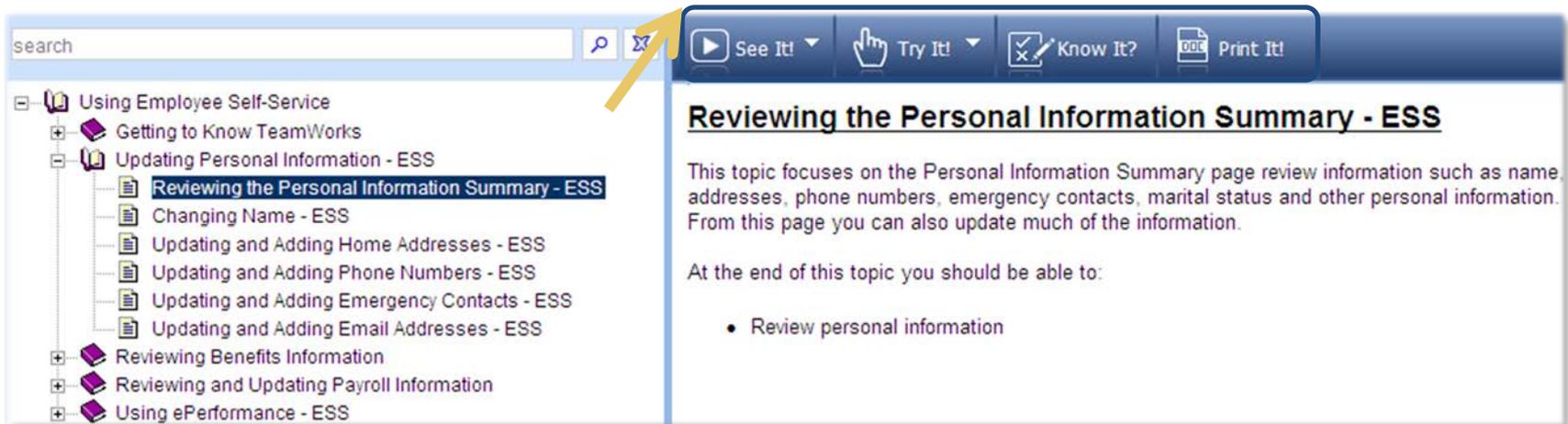
Employees use TeamWorks Self-Service module to review, add, update, or delete personal information. Users can access each transaction individually or use the Personal Information Summary page to review all personal information at once. The buttons on the Personal Information Summary page provide quick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

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

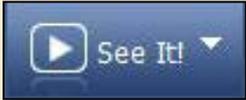
- Change name information
- Maintain home and mailing address information
- Maintain emergency contact information
- Maintain email address information
- Maintain phone number information
- Review personal information

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.

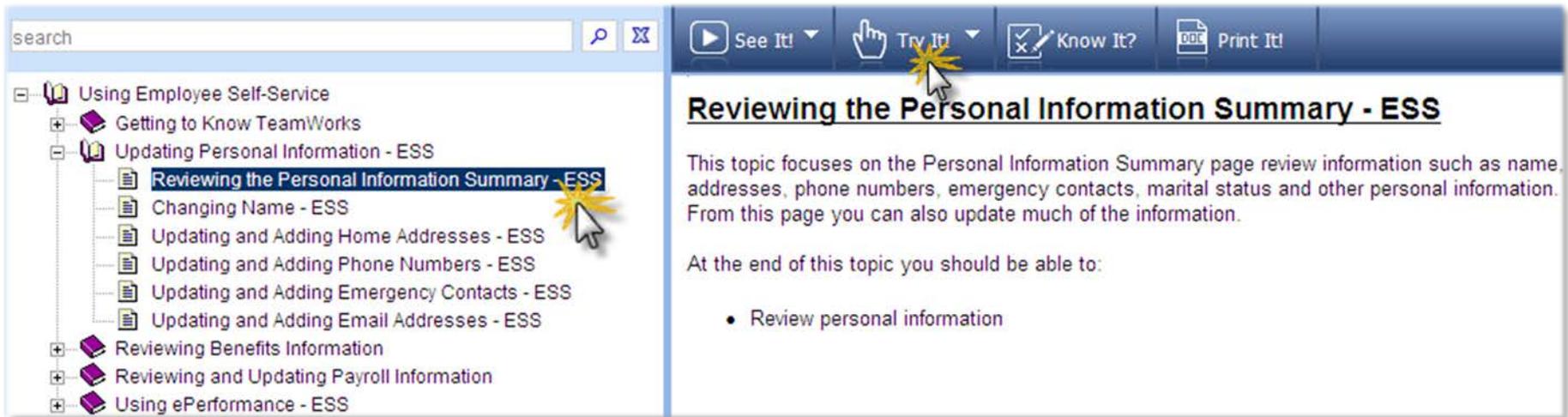


Playback Modes

Button	Description
	See It! – 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.
	Try It – 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.
	Know It? – 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.
	Do It! – Clicking this button launches the topic in Do It! mode. It guides the user as they perform the tasks in the live TeamWorks environment.
	Print It! – 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 for training. On the left is a navigation tree under 'Using Employee Self-Service'. The selected item is 'Reviewing the Personal Information Summary - ESS'. On the right 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. Below the control bar is the content area for the selected topic, titled 'Reviewing the Personal Information Summary - ESS'. The content includes a description of the topic and a list of learning objectives.

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:

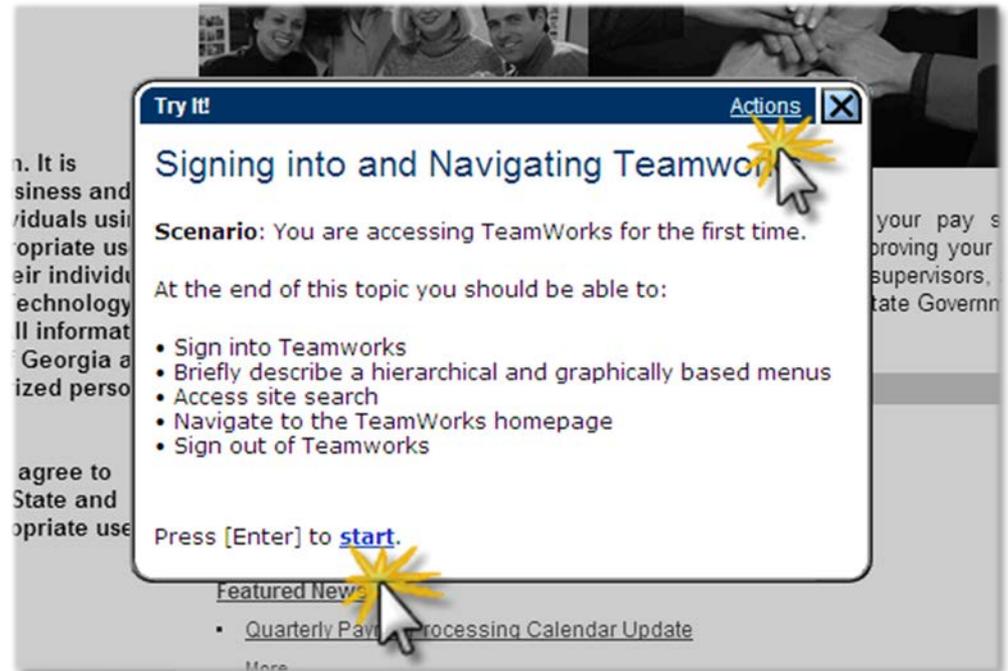
- Review personal information



Always take the training
in order the first time.

Navigating TeamWorks Online Training Simulation

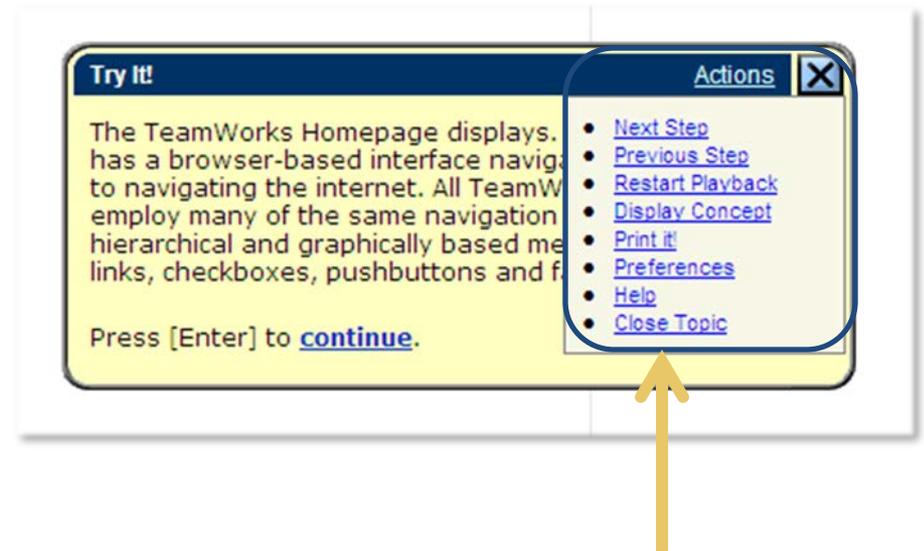
When the simulation player displays, it provides the user with an introduction bubble that includes a topic scenario, objectives and initial navigation if necessary. In this example, the user is playing the simulation in **Try It!** mode. This means the user has to read and follow the prompts to move through the topic. In addition, the user can navigate by using the **Actions** menu or by using the on screen instructions.



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.

Personal Information
Personal Information Summary

TEAMWORKS MENU

- My Help
- Quick Links
- SAO Support
- Self Service
- Manager Self Service
- Workforce Administration**
- Benefits
- Compensation
- Payroll for North America
- Global Payroll & Absence
- Workforce Development
- Organizational Development
- Enterprise Learning
- Workforce Monitoring
- Set Up HRMS
- PeopleSoft
- My Content
- Content Management
- Portal Administration
- Worklist

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.

EMPLOYEE LEA

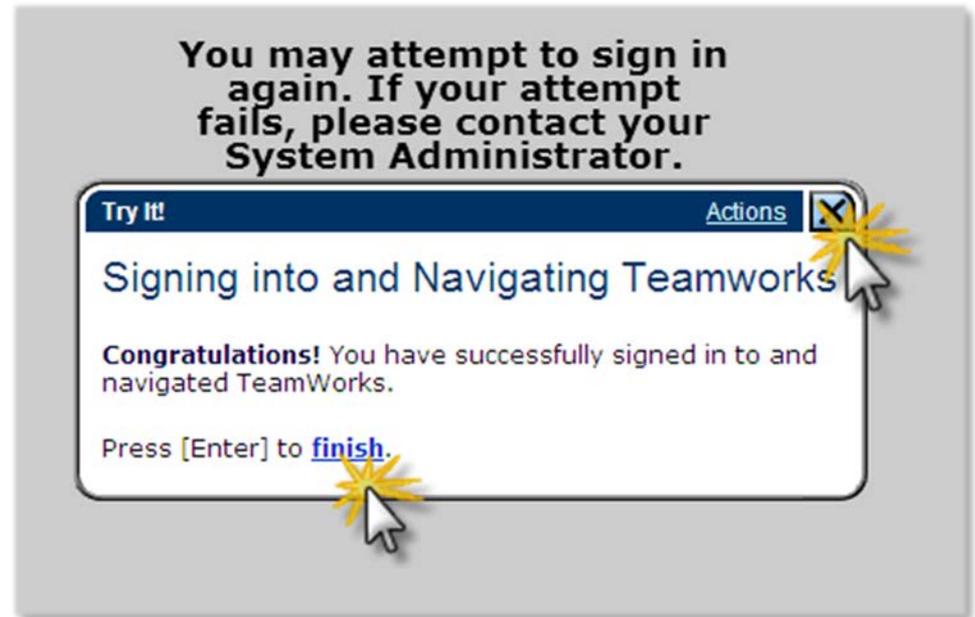
There is no information display at this time. accessing this info

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

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

