

Miami-Dade County



End-User Training Guide

Course Code: ERP 102

Course Title: INFORMS Navigation and Online Help

Course Overview

Course Description

This course provides a comprehensive review of the INFORMS Navigation and Online Help processes.

This course consists of the following modules.

- Module 1: Course Introduction
- Module 2: INFORMS Navigation
- Module 3: INFORMS User Productivity Kit (UPK)
- Module 4: Course Summary

Training Audiences

The following audience(s), by INFORMS Security role(s), are required to complete this course before being granted related system access.

- All INFORMS Users

Prerequisites

Participants are required to complete the following End-Users Training courses before starting this course.

- ERP 101 – Overview of INFORMS

Delivery Method

This course is intended to be delivered through Instructor-led Training.

Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 30 Minutes.

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Module 1: Course Introduction

Topics

This module covers the following topics.

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities

Module 1: Course Introduction

Course Administration and Logistics

To get the most benefit from this course, participants should:

- Actively participate in class and ask questions as needed
- Please turn off cell phones and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly

Module 1: Course Introduction

Learning Objectives

At the conclusion of this course, participants will be knowledgeable of the following topics:

- Logging in to INFORMS
- Key Features on the INFORMS Home Page
- Key Elements of Tiles
- Using the Action Menu
- How to use the Navigation Bar (NavBar)
- Navigation Collection
- How to add Favorites
- Entering and Finding Data in INFORMS
- INFORMS Approval Process
- How to access the User Productivity Kit (UPK) for Online Help
- How to use the UPK Player

Module 1: Course Introduction

Training Audience

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

- All INFORMS users

Module 1: Course Introduction

- Module 1:
Course
Introduction
Summary
- The following key concepts were covered in this module:
- Course Administration and Logistics
 - Learning Objectives
 - Roles and Responsibilities

Module 2: INFORMS Navigation

Lessons

This module includes the following lessons.

- Overview of INFORMS Navigation
- Logging in to and navigating in INFORMS
- Setting up INFORMS for Your Daily Work Life
- Entering and finding data in INFORMS

Lesson 1: Logging in to and Navigating INFORMS

Lesson 1: Overview

At the conclusion of this lesson, users will be able to.

- Logging in to INFORMS
- Key Features on the INFORMS home page
- Key Elements of Tiles
- Using the Action Menu
- How to Use the Navigation Bar (NavBar)
- Navigation Collection

Lesson 1: Logging in to and Navigating INFORMS

Key Terms



The following key terms are used in this Lesson.

Term	Definition
Dashboard	The home page for the INFORMS application that displays the main menu for easy navigation. The Dashboard lays out links, which users can personalize their content and includes a favorites bar for frequently visited content. There are also header links for quick customization. The Dashboard can only be accessed after logging into the INFORMS application.
Favorites	A user's personal list of navigation shortcuts.
Main Menu	A navigation menu that displays all folders, sub-folders, and links relevant for the user's role.
Search/Match	A feature that enables users to search for and identify duplicate records in the database.
Single Sign-on	Single Sign-on (SSO) is an authentication scheme that allows a user to log in with a single ID and password to any of several related, yet independent, software systems.

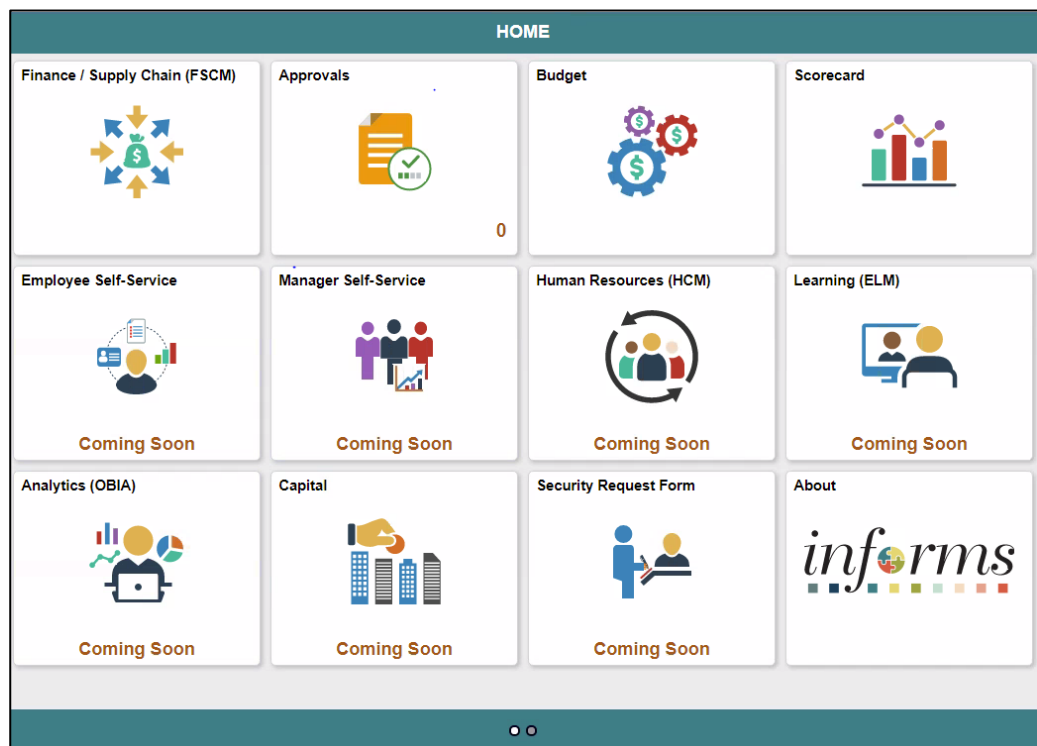
Lesson 1: Logging in to and Navigating INFORMS

Lecture 1:

Logging in to INFORMS

This lesson will review logging in to INFORMS.

- Users will be automatically logged in using Single Sign-on authentication after selecting the [INFORMS](#) link.
- Single Sign-On utilizes your current County Active Directory credentials.
- Users that do not have Single Sign-On ability will access INFORMS using the link provided on the INFORMS webpage.
- Users will then be directed to the INFORMS Portal. To be able to use INFORMS functionality and conduct transactions, users will need to select the specific Tile for their work.



Lesson 1: Logging in to and Navigating INFORMS

Lecture 2: Key Features on the INFORMS Home Page

This lesson will review Key Features on the INFORMS Home Page.

After logging into the INFORMS Home Page, the following icons will be displayed.

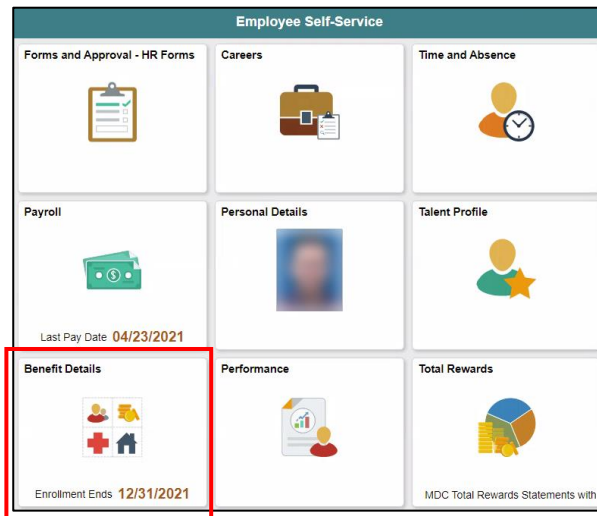
Icon	Description
	Homepage drop-down selection. When there are multiple homepages to which users have access, users switch to other homepages using this drop-down list.
	Home / Home button. Use to return to the default homepage, which is the fluid homepage, users arrive at immediately upon sign on.
	Search / Search button. Use to perform Global Search.
	Notify / Notifications button. Displays the notification window showing any pending actions or alerts.
	Action / Action menu button. Use to display the actions menu.
	NavBar / Navigation bar button. Use to enable the navigation bar (NavBar).
	Homepage indicator. When there are multiple homepages to which users have access, the homepage indicator shows the total number of available homepages, represented by a small circle.
	Refresh / Refresh button. When users access the homepage, INFORMS reloads and refreshes all Tile content. Use to refresh the fluid homepage manually, so that all live Tiles display the most current representation of the underlying data.
	Homepage Tiles. Tiles allow users a quick way to perform routine tasks. Tiles give users direct access to targeted transactions.

Lesson 1: Logging in to and Navigating INFORMS

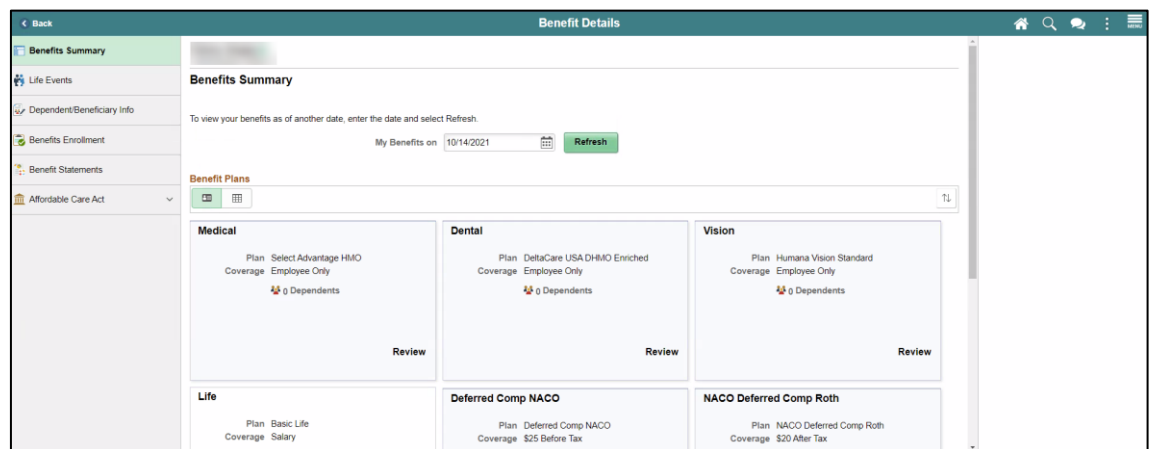
Lecture 3: Key Elements of Tiles

This lesson will review the key elements of Tiles.

- Homepages consist of a collection of Tiles that show information to users and enable an easy way to navigate around INFORMS.
- Homepages will be organized and delivered to end-users with Tile content appropriate for specific roles, such as employee or manager.
- Tiles allow users a quick way to perform routine tasks, such as decision making or monitoring. Tiles give users direct access to targeted transactions.
- Each Homepage dropdown is configured so that the Tiles are relevant to each module group. For example, the Employee Self-Service dropdown will show all the Tiles related to Employee Self-Service. However, access to these Tiles will depend on user’s role.



- Selecting one of the Tiles will direct users to the specific page that the Tile corresponds to. For example, the Benefit Details Tile will direct users to the Benefits Summary component.

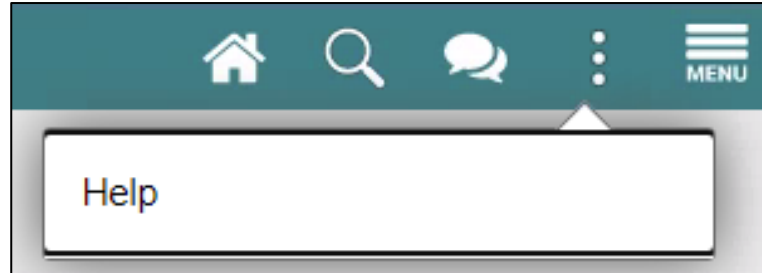


Lesson 1: Logging in to and Navigating INFORMS

Lecture 4: Using the Action Menu

This lesson will review how to use the **Action Menu**.

- Press the **Action** button to reveal the **Help Menu**. This directs users to online help and documentation related to INFORMS.

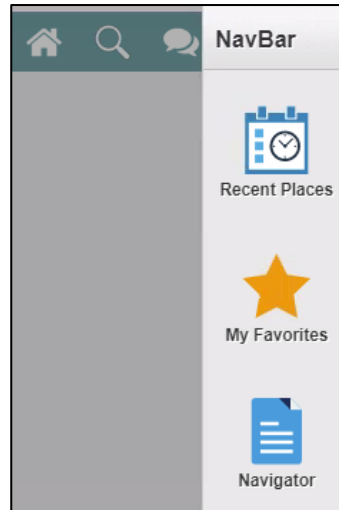





Lesson 1: Logging in to and Navigating INFORMS

Lecture 5: How to Use the Navigation Bar (NavBar)

This lesson will review How to Use the Navigation Bar.

- After selecting the **Navigation Bar** button, the NavBar side page appears. Use this page to access additional navigational options.

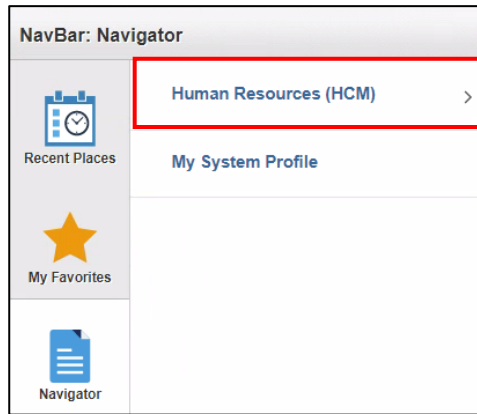


Icon	Description
 Recent Places	<p>Recent Places. Displays links to the pages recently visited by the current users.</p>
 My Favorites	<p>My Favorites. Displays any specified favorite pages. Favorites can be added through the Add to Favorites link.</p>
 Navigator	<p>Navigator. Displays the traditional menu structure as the users would see when accessing INFORMS in classic mode and using the Main Menu.</p>

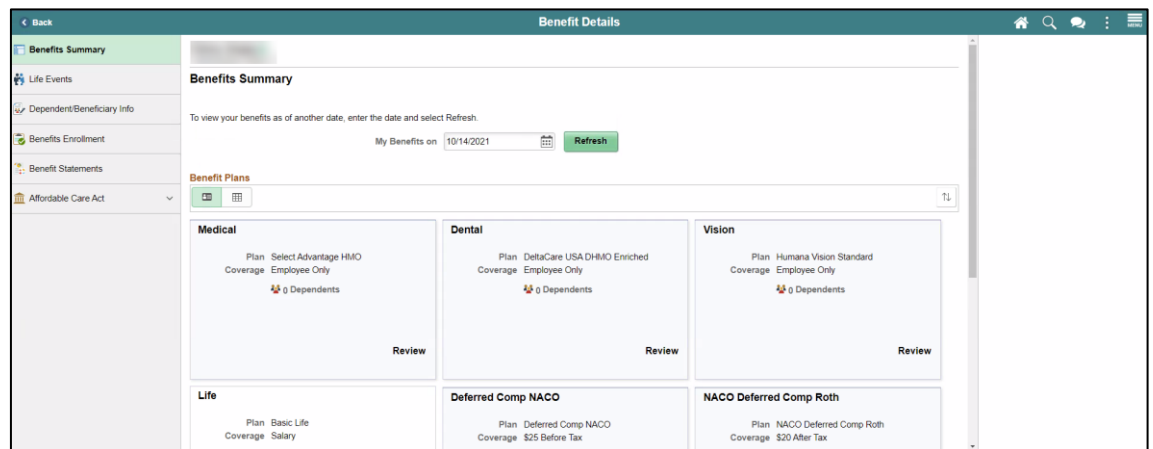
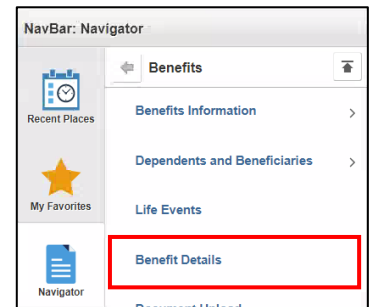
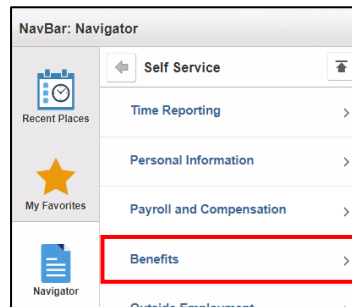
- Selecting the **Navigator** shows all the module menus that users have access to.

Lesson 1: Logging in to and Navigating INFORMS

Lecture 5: How to Use the Navigation Bar (NavBar)



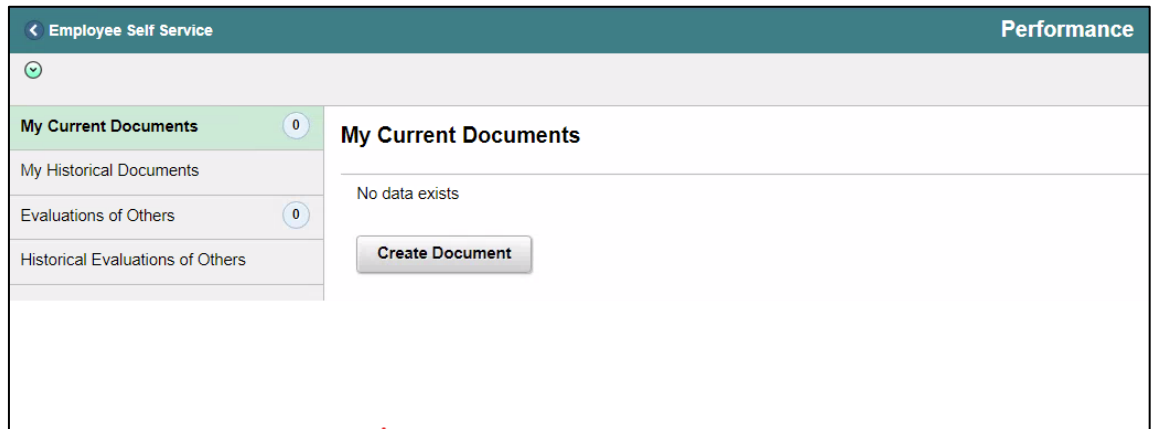
- These navigations direct users to the same components as the Tiles on the Home page. For example, **Human Resources (HCM) > Self Service > Benefits > Benefit Details** will direct users to the **Benefits Summary** Page. Again, only if users have the appropriate security access.



Lesson 1: Logging in to and Navigating INFORMS

Lecture 6: Navigation Collection

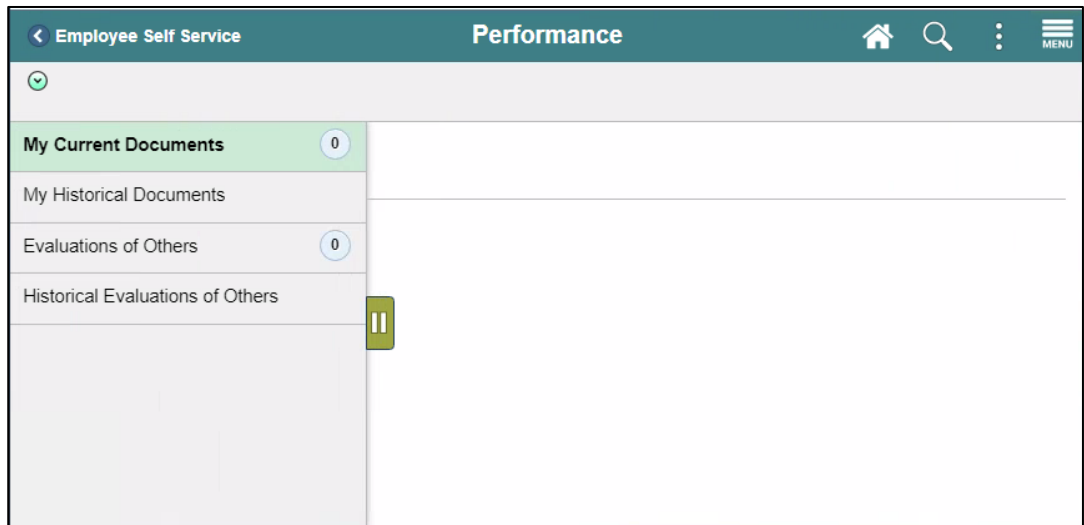
- A **Navigation Collection** groups together functionally similar components. This enables users to easily navigate between the different components.
- A **Navigation Collection** is displayed in a two-panel layout with links to components displayed in the left panel and the selected component displayed in the right content area. Component links may be grouped together into folders.
- In the below image **My Current Document** is the selected component link in the **Performance** folder.



Lesson 1: Logging in to and Navigating INFORMS

Lecture 6: Navigation Collection

- The two-panel layout becomes an overlay when the window narrows and on small form factor devices.



- Select the Hide / Unhide button to hide the left panel.



Lesson 1: Logging in to and Navigating INFORMS

Lesson Summary



Having completed the lesson, users should be able to.

- Logging in to INFORMS
- Key Features on the INFORMS Home Page
- Key Elements of Tiles
- Using the Action Menu
- How to Use the Navigation Bar (NavBar)
- Navigation Collection

Lesson 2: Setting Up INFORMS for Your Work

Lesson 2: Overview

At the conclusion of this lesson, users will be able to know:

- How to add Favorites

Lesson 2: Setting Up INFORMS for Your Work

Key Terms

The following key terms are used in this Lesson.

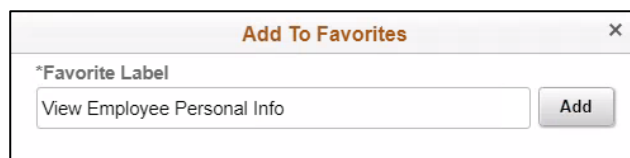
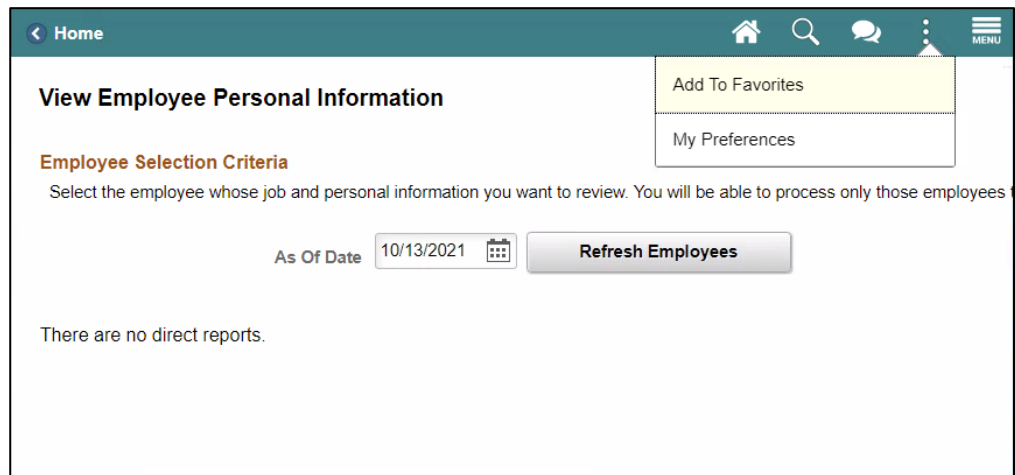


Term	Definition
N/A	N/A

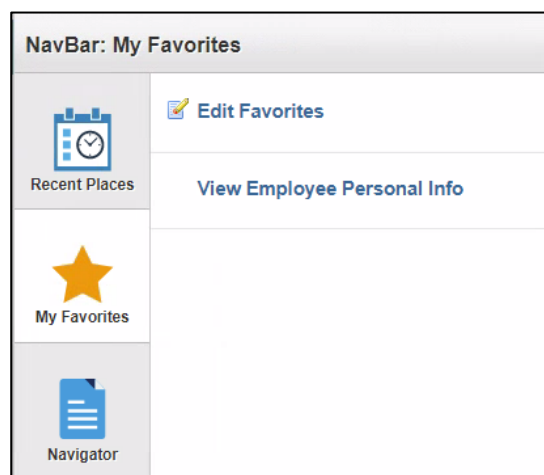
Lesson 2: Setting Up INFORMS for Your Work

Lecture 1: How to add Favorites This lesson will review how to add Favorites.

- Users can save frequently used pages to **My Favorites** for easy access.
 - **Add to Favorites** is available on the specific components/pages in the **Navigation Collection** by selecting the **Action Menu**.



- Users will then be able to edit the sequence or delete the items on their favorites under the **NavBar**.



Lesson 2: Lesson Summary

Lesson Summary



Having completed the Setting up INFORMS for Your Work lesson, users should be able to:

- How to Add Favorites

Lesson 3: Entering and Finding Data in INFORMS

Lesson 3: Overview

At the conclusion of this lesson, users will be able to:

- How to Find Data
- How to Enter Data

Lesson 3: Entering and Finding Data in INFORMS

Key Terms



The following key terms are used in this Lesson.

Term	Definition
Component	An INFORMS Component is a collection of pages that are logically grouped.
Wildcards	Characters that assist with the search function. The three wildcards are the percent sign (%), which directs the search function to match one or more characters in the search box; the underscore (_), which directs the search function to match any single character in the search box; and the backslash (\), which is an escape character that directs the search function to NOT treat the next character as a wildcard.

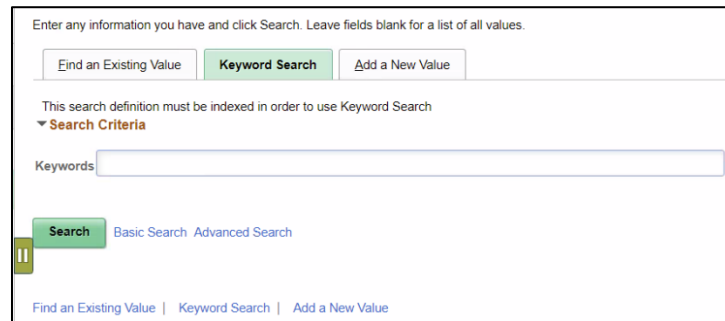
Lesson 3: Entering and Finding Data in INFORMS

Lecture 1:

This lesson will review finding existing values.

How to Find Data

- Search is able to find values based on indexes from the entire system and related documentation.
- Similarly, there is Component specific search functionality for the users to be able to search for specific data on the page users are looking at.
- For the users to see this search, the users will need to navigate to the specific component, and the search page will automatically be the landing page.



- The Component Search page usually has 2 modes.
 - **Basic search** enables users to search by just one field at a time, and then only using the “begins with” operator. To designate the search field, if more than one is available, select the desired field from the Search by drop-down list box, and then search the Search button to display the search results. Users can narrow a search by first entering part of a value or description at the beginning with a text box.
 - For instance, to find all values beginning with the letters INFORMS, enter INFORMS in the begins with text box, and then Search or press the **Enter** key.

Lesson 3: Entering and Finding Data in INFORMS

Lecture 1: How to Find Data

- **Advanced Search** can further narrow a search, by searching on multiple fields simultaneously and by using a variety of search operators. In some cases, search pages may display the Include History and Correct History options. Search pages contain the Case Sensitive checkbox to enable users to perform case-sensitive searches.

Record Administrative Actions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

Empl ID	begins with ▼	<input type="text"/>
First Name	begins with ▼	<input type="text"/>
Last Name	begins with ▼	<input type="text"/>
Payroll Status	= ▼	<input type="text" value=""/>
Employee Classification	begins with ▼	<input type="text"/>
Employee Type	= ▼	<input type="text" value=""/>
Business Unit	begins with ▼	<input type="text" value="CR"/>
Supervisor ID	begins with ▼	<input type="text"/>
Job Title	begins with ▼	<input type="text"/>

Case Sensitive

Search

Clear

[Basic Search](#) [Save Search Criteria](#)

Lesson 3: Entering and Finding Data in INFORMS

Lecture 1: How to Find Data

- When specifying search criteria, enter a full or partial value for any key field. INFORMS queries the search record and presents a list of possible matches. If only one match exists, it displays the page requested.
- If users select Hourly in the **Employee Type** field and the search criterion for that field is set to contain, then INFORMS narrows the search by displaying all Hourly Employees. With this information, users might be able to determine the correct profile based on the results in the Search Results grid. Select any link in the row of the profile to access that profile in the Search Results grid.

Record Administrative Actions
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID begins with

First Name begins with

Last Name begins with

Payroll Status =

Employee Classification begins with

Employee Type = Hourly

Business Unit begins with CR

Supervisor ID begins with

Job Title begins with

Case Sensitive

Search **Clear** Basic Search Save Search Criteria

Search Results
Only the first 300 results can be displayed

View All 1-100 of 300

Empl ID	First Name	Last Name	Payroll Status	Employee Classification	Employee Type	Supervisor ID	Job Title
Veronica	Tavantz		Active	AA	Hourly		Personnel
Maree	Augustin		Active	AA	Hourly		CBRT (The TI)
Monique	Jones-Young		Active	AA	Hourly		Correction
Jemma	Duvallon		Active	AA	Hourly		Accountant
Thomas	Clunator		Terminated	AA	Hourly		Correction
Candace	Minick		Terminated	AA	Hourly		Correction

- **Using Operators.** when performing an advanced search, users can use a variety of operators to narrow searches. For example, users can search for customers by first letter, by values that are less than or greater than a specified amount, etc. Operator examples include.

Operator	Field Use
<i>begins with</i>	Character fields.
<i>contains</i>	Character fields.
=	All field types.
<i>not=</i>	All field types.
<	All field types.
<=	All field types.
>	All field types.
>=	All field types.
<i>between</i>	All field types.
<i>in</i>	All field types.

Lesson 3: Entering and Finding Data in INFORMS

Lecture 1:
How to Find
Data

- Saving Search Criteria.** When conducting an advanced search, use the **Save Search Criteria** link to name and save the search criteria. Select the **Use Saved Search** drop-down list box to select a saved search. Saved searches can be used in other search pages that use the same search record. Remove any saved searches by using the **Delete Saved Search** link.

Record Administrative Actions

Save Search As

Name the search and then click Save.

Name of Search:

The saved search will contain these values:

Empl ID begins with
 First Name begins with
 Last Name begins with
 Payroll Status =
 Employee Classification begins with
 Employee Type = Hourly
 Business Unit begins with CR
 Supervisor ID begins with
 Job Title begins with

Save
[Return to Advanced Search](#)

- Wildcards.** INFORMS applications support three wildcard characters to help users search for data in character fields. Use these wildcard characters to find the exact information needed. The supported standard wildcard characters are.

Wildcard	Search Action
% (percent symbol)	Match one or more characters.
_ (underscore)	Match any single character.
\ (backslash)	Escape character; do not treat the next character as a wildcard.

- Retrieving Historical Data.** if users have the appropriate permissions to see and modify history records, then these two options can appear on a search page.
 - **Include History.** Select to retrieve history records when INFORMS processes the search.
 - **Correct History.** Select to retrieve and be able to correct history records when INFORMS processes the search.

Lesson 3: Entering and Finding Data in INFORMS

Lecture 1: An example of Include History and Correct History is below.

How to Find Data

Define Contract Types

Enter any information you have and click Search. Leave fields blank for a list of all values.


[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Set ID

Contract Type

Include History Correct History

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

Lesson 3: Entering and Finding Data in INFORMS

Lecture 2:

This lesson will review the common fields used for entering Data in INFORMS.


How to Enter Data

- Each INFORMS page has common Data Entry fields that are used throughout INFORMS.
 - **Edit Box.** Move to and highlight an edit box by pressing the tab key or by double-clicking and highlighting the text. Users can type over the existing highlighted text. If the text is not highlighted, users are inserting rather than replacing text. Some edit boxes are associated with database fields that have formatting attributes assigned to them.



A screenshot of a standard edit box. The text "Item Description" is displayed in a small font at the top left of the box. The rest of the box is empty and has a thin border.

- **Long Edit Box.** Use long edit boxes to enter anecdotal information such as comments or free form informational text.







A screenshot of a long edit box. The text "Additional Information" is displayed in a small font at the top left of the box. The rest of the box is empty and has a thin border.

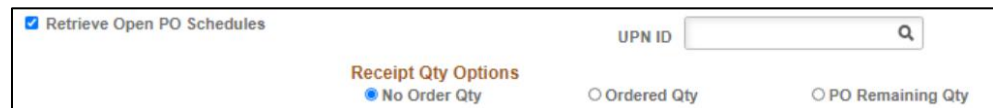
- **Drop-Down List Boxes.** To select a single item from the list, search the down arrow to display the list, scroll through the list until users choice is visible, and then search the desired list item. The list closes and the selected value appears in the list box. Users can also type the first letter of an item to select it. If there is more than one choice for a letter, type the letter repeatedly to cycle through the list.



Lesson 3: Entering and Finding Data in INFORMS

Lecture 2: How to Enter Data

- **Look up Prompt**  . Some edit box fields are linked to database prompt tables, which store values for information shared across the organization such as department IDs, country codes and state codes. These tables are called prompt or lookup tables because users prompt INFORMS to look up and present a list of valid field values that reside in the prompt table. Prompt fields are defined so that INFORMS compares the values that users enter to values that are in a prompt table to ensure that the values are valid.
- **Calendar**  . When entering information in a date field, users can select the calendar prompt button to the right of the field to help users choose a date. Users can also enter the current date by entering today in the date field. Press Tab to exit the field; the current date appears.
- **Radio Buttons**  and **Checkboxes**  . Radio buttons correspond to data users have to choose that are mutually exclusive such as gender. Checkboxes on the other hand pertain to whether or not a value is true/applicable to certain data or not.



Retrieve Open PO Schedules
 UPN ID

Receipt Qty Options
 No Order Qty
 Ordered Qty
 PO Remaining Qty

- Fields that have asterisks on them are designated as required fields. Fields must be completed in order to proceed.
- Once all the required fields are populated, the page is ready to save.

Lesson 3: Entering and Finding Data in INFORMS

Lesson Summary



Having completed the Entering and Finding Data in INFORMS lesson, users should be able to.

- How to Find Data
- How to Enter Data

Lesson 4: INFORMS Approvals

Lesson 4: Overview

Learning Objectives

At the conclusion of this lesson, users will be able to.

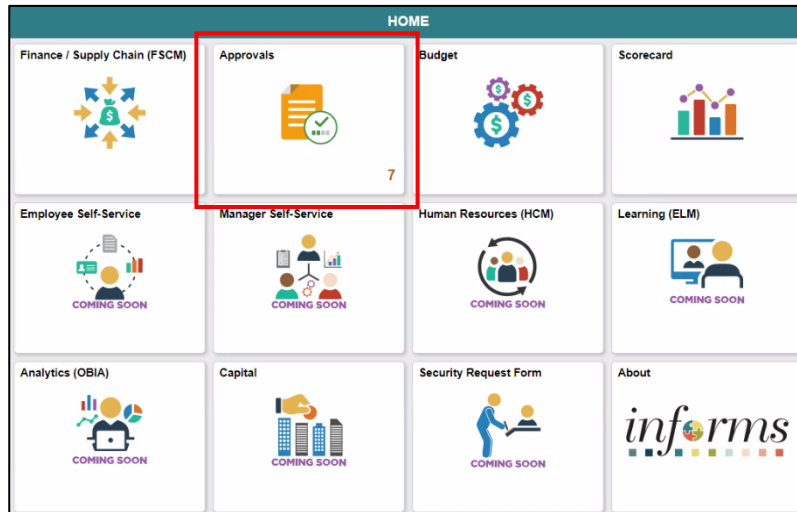
- Navigate to the Approval Worklist
- Understand Approval Components
- Understand the Approval Chain

Lesson 4: INFORMS Approvals

Lecture 1: INFORMS Approvals

This lesson will review how to navigate to the Approval Worklist.

- The **Approval** tile is located on the INFORMS homepage that is seen as soon as a user logs in. This is the most convenient and recommended method to approve items.
- The number of items pending Approval is displayed in the bottom right of the **Approval** tile.



- Select the **Approval** tile to see a list of items pending approval.

Pending Approvals			
View By	Type		
All		7	
Absence Request		1	
Reported Time	Reported	6	
All 7 rows			
Reported Time	Quantity for Approval 8.00 Hours	03/01/2021 - 03/01/2021	Routed 02/23/2021 >
Reported Time	Quantity for Approval 80.00 Hours	01/11/2021 - 01/22/2021	Routed 03/14/2021 >
Reported Time	Quantity for Approval 8.00 Hours	03/18/2021 - 03/18/2021	Routed 03/18/2021 >
Absence Request	Holiday Family, 8 Hours - ELIGIBLE	04/02/2021	Routed 04/02/2021 >
Reported Time	Quantity for Approval 1.00 Hours	10/11/2021 - 10/11/2021	Routed 10/12/2021 >
Reported Time	Quantity for Approval 1.00 Hours	10/18/2021 - 10/18/2021	Routed 10/12/2021 >
Reported Time	Quantity for Approval 1.00 Hours	10/18/2021 - 10/18/2021	Routed 10/14/2021 >

- Users will see a list of all tasks that require approval.

Lesson 4: INFORMS Approvals

Lecture 1: INFORMS Approvals

- Select one of the tasks to see additional details.
- This page also displays the **Approve**, **Deny**, and **Hold** buttons.

Pending Approvals Reported Time

Marina Manager 2 Approve Deny

1 line(s) are pending your approval

In Process

Summary

Time Period: 03/01/2021 - 03/01/2021

Quantity for Approval: 8.00 Hours Quantity Scheduled: 8.00 Hours

Quantity Submitted/ Approved: 0.00 Hours Quantity Reported: 8.00 Hours

Quantity Denied: 0.00 Hours

[View Legend](#)

Reported Time Details

Pending All 1 row

Select	Report Date	Time Reporting Code	Quantity for Approval	Reported for Date / Scheduled for Date
<input type="checkbox"/>	03/01/2021	REG - Regular Time	8.00 Hours	8.00 Hours / 8.00 Hours

Approver Comments

Approval Chain >

- Select the **Approval Chain** link to view the approval workflow.

Approval Chain

By PosnSupervisor

Reported Time Approval for REG on 2021-03-01 Pending

Route to PosnSupervisor

Pending +

Sheerly Moya
TLByPosnSupervisor >

Lesson 4: INFORMS Approvals

Lesson Summary



Having completed the INFORMS Approvals lesson. Users should be able to:

- Navigate to the Approval Worklist
- Understand Approval Components
- Understand the Approval Chain

Module 3. INFORMS User Productivity Kit (UPK)

Lessons

This module includes the following lessons.

- How to access the User Productivity Kit (UPK) for Online Help
- How to use the UPK Player and Playback Modes

Lesson 1: Using the User Productivity Kit (UPK) for Online Help

Lesson 1: Overview

User Productivity Kit, also known as UPK, is a training tool used to create, deploy and maintain learning content.

UPK content is created by recording screenshots and the associated actions within INFORMS. To enhance the UPK training, callouts and details are added to provide context and additional explanation.

UPK content is accessed through the UPK Player. Within UPK Player, there are multiple options to access the learning content. Examples include See It! Try It! Know It! Print It!

Try It! is most commonly used for training, as it allows end-users a hands-on experience to follow along with guided instructions.

Lesson 1: Using the User Productivity Kit (UPK) for Online Help

Key Terms



The following key terms are used in this module.

Term	Definition
User Productivity Kit	Also known as UPK, this is a training tool used to create, deploy, and maintain learning content.
UPK Player	The output/ format used to deploy UPK content for learning. It is launched in an internet browser and provides an interactive simulation that mimics the INFORMS system.

Lesson 1: Using the User Productivity Kit (UPK) for Online Help

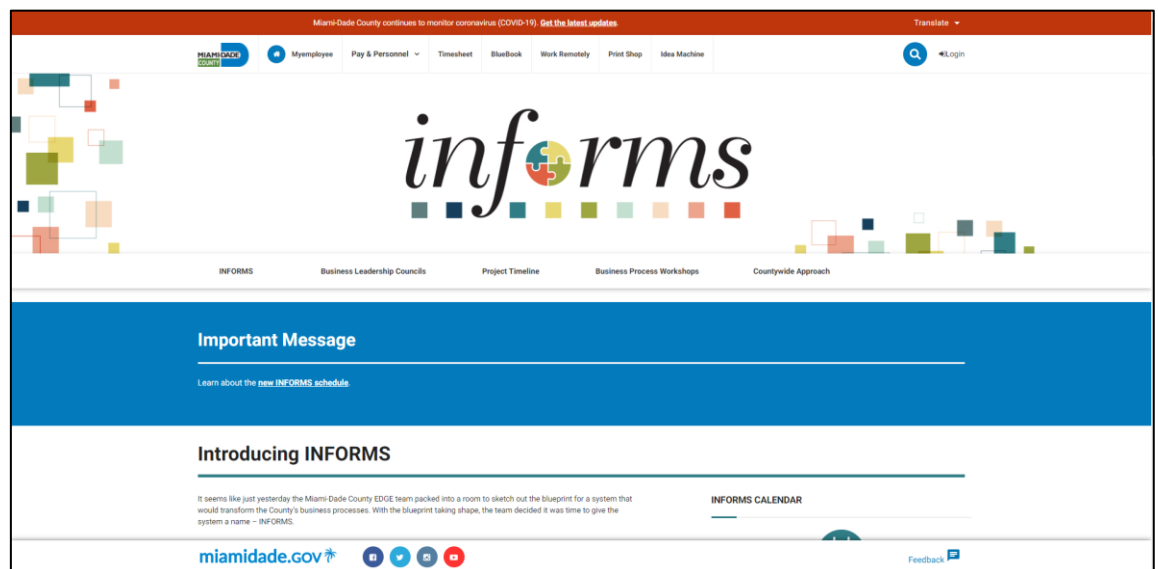
Lecture 1: How to access the User Productivity Kit (UPK) for Online Help

This lesson will review how to access the User Productivity Kit (UPK) for Online Help.

The User Productivity Kit (UPK) is an on-demand training tool that provides users the opportunities to learn INFORMS at one’s own pace and convenience.

UPK Player is launched in an internet browser and provides an interactive simulation with multiple playback options.

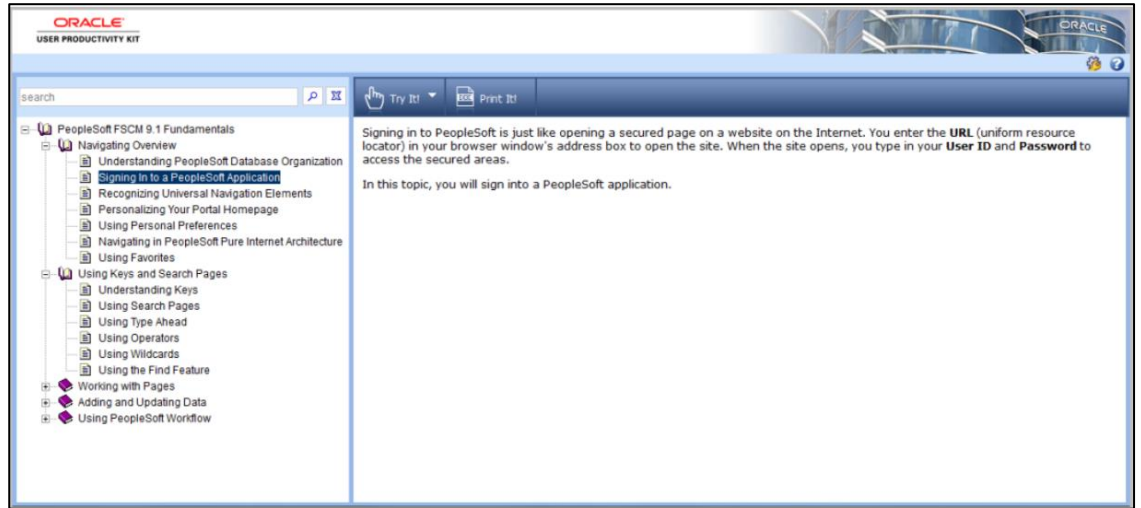
Links to all UPKs will be published on the INFORMS web page. Exact location is yet to be determined.



Lesson 1: Using the User Productivity Kit (UPK) for Online Help

Lecture 2: How to use the UPK Player

This lesson will review how to use the UPK Player.



Viewing Topics (Outline)

Module		A module is used to organize a specific unit of learning. It can contain other documents such as sections, topics, or even other modules.
Section		A section is very similar to a module. The main difference between a section and module is its visual representation that can help you differentiate between the components of users outline and locate areas in the structure faster.
Topic		A topic represents a series of recorded steps that complete a task in an application. This is the training exercise level.

Lesson 1: Using the User Productivity Kit (UPK) for Online Help

Lecture 2: How to use the UPK Player

How to use the UPK Player.

Step 1	<p>Expand the appropriate Module in the Outline section located on the left side of the player.</p> <p>NOTE: The Concept section, located on the right side of the player, provides background information about the highlighted Module, Section, or Topic. If the Topic is highlighted, an Information section will appear that will contain key information used in the simulated process.</p>
Step 2	<p>Expand the appropriate Section in the Outline section located on the left side of the player.</p>
Step 3	<p>Select a Topic. The Player mode buttons in the Playback Mode section will become active.</p>

- **See It! mode** enables users to learn by watching an animated demonstration of the steps for a task being performed in a simulated environment. All of the required activities, such as moving the mouse and entering data, are completed automatically.
- **Try It! mode** enables users to learn interactively in a simulated environment. Users are prompted for mouse clicks and/or keystrokes to complete the task.
- **Know It? mode** enables users to test their knowledge of a particular task. Users are instructed to complete a particular task without step-by-step instructions. Instead, users complete the steps on their own in a simulated environment, and users are scored on how accurately users complete them.
- **Print It! mode** enables users to display linked documentation in the form of a Job Aid or System Process Document.

Lesson 1: Lesson Summary

Lesson Summary



Now that users have completed the How to access the User Productivity Kit (UPK) for Online Help lesson, users should be able to.

- How to access the User Productivity Kit (UPK) for Online Help
- How to use the UPK Player and Playback Modes

Module 4: Course Summary

Course Summary The Course Summary module covers three topics.



- Course Content Summary
- Additional Training and Job Aids
- Course Evaluation

Module 4: Course Summary

Objectives Achieved



Congratulations! Users have completed the ERP 102 – INFORMS Navigation and Online Help course. Users now should be able to do or know the following.

- Logging in to INFORMS
- Key Features on the INFORMS Home Page
- Key Elements of Tiles
- Using the Action Menu
- How to use the Navigation Bar (NavBar)
- Navigation Collection
- How to add Favorites
- Entering and Finding Data in INFORMS
- INFORMS Approvals
- How to access the User Productivity Kit (UPK) for Online Help
- How to use the UPK Player

Module 4: Course Summary

Additional Training and Job Aids

Users also have the following resources available to users.

User Productivity Kits

- INFORMS Navigation and Online Help

Job Aids

- N/A

For additional information, be sure to visit.

- MiamiDade.gov/informs

Module 4: Course Summary

Key Terms



The following key terms are used in this course.

Term	Definition
Component	An INFORMS Component is a collection of pages that are logically grouped.
Dashboard	The home page for the INFORMS application that displays the main menu for easy navigation. The Dashboard lays out links, which users can personalize their content and includes a favorites bar for frequently visited content. There are also header links for quick customization. The Dashboard can only be accessed after logging into the INFORMS application.
Data Source	Is the location where the data used by the tool comes from. In the case of Pivot Grids and BI Publishers, it is usually INFORMS Query.
Favorites	A user's personal list of navigation shortcuts.
Main Menu	A navigation menu that displays all folders, sub-folders, and links relevant for the user's role.
PeopleTools	PeopleTools provides the underlying technology for INFORMS applications. All INFORMS applications are built, deployed, and maintained using PeopleTools.

Module 4: Course Summary

Key Terms



The following key terms are used in this course.

Term	Definition
Search/Match	A feature that enables users to search for and identify duplicate records in the database.
Single Sign-on	Single Sign-on (SSO) is an authentication scheme that allows a user to log in with a single ID and password to any of several related, yet independent, software systems.
UPK Player	The output/ format used to deploy UPK content for learning. It is launched in an internet browser and provides an interactive simulation that mimics the INFORMS system.
User Productivity Kit	Also known as UPK, this is a training tool used to create, deploy, and maintain learning content.

Module 4: Course Summary

Key Terms

The following key terms are used in this course.



Term	Definition
Wildcards	Characters that assist with the search function. The three wildcards are the percent sign (%), which directs the search function to match one or more characters in the search box; the underscore (_), which directs the search function to match any single character in the search box; and the backslash (\), which is an escape character that directs the search function to NOT treat the next character as a wildcard.
XML	Extensible Markup Language (XML). This is used to define data to dictate how users are represented online.