
End User Training Resource Guide

Course Code: ERP 102

**Course Title: INFORMS Navigation, Reporting, and
Online Help**

Updated 02-24-2025

Guide Overview

Guide Description

This guide provides a comprehensive review of the INFORMS Navigation, Reporting, and Online Help processes.

This guide consists of the following modules:

- Module 1: Course Introduction
- Module 2: INFORMS Navigation
- Module 3: INFORMS Reporting
- Module 4: Guide Summary



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Module 1: Introduction

Topics

This module covers the following topics:

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

Module 1: Introduction

Learning Objectives

At the conclusion of this guide, participants 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
- How to add Favorites
- Using WorkCenters
- Entering and Finding Data in INFORMS
- INFORMS Approval Process
- Run reports in INFORMS
- Use the Report Manager
- Know the basics of Query Reporting
- Run a pre-defined Query
- Run a BI Publisher Report
- Run a Pivot Grid Report

Module 1: Introduction

Audience:	The following roles are associated with this topic and will play a part in conducting the related business processes for the County:
Roles and Responsibilities	<ul style="list-style-type: none">• All INFORMS users

Module 1: Introduction

Module 1: 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, you 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:

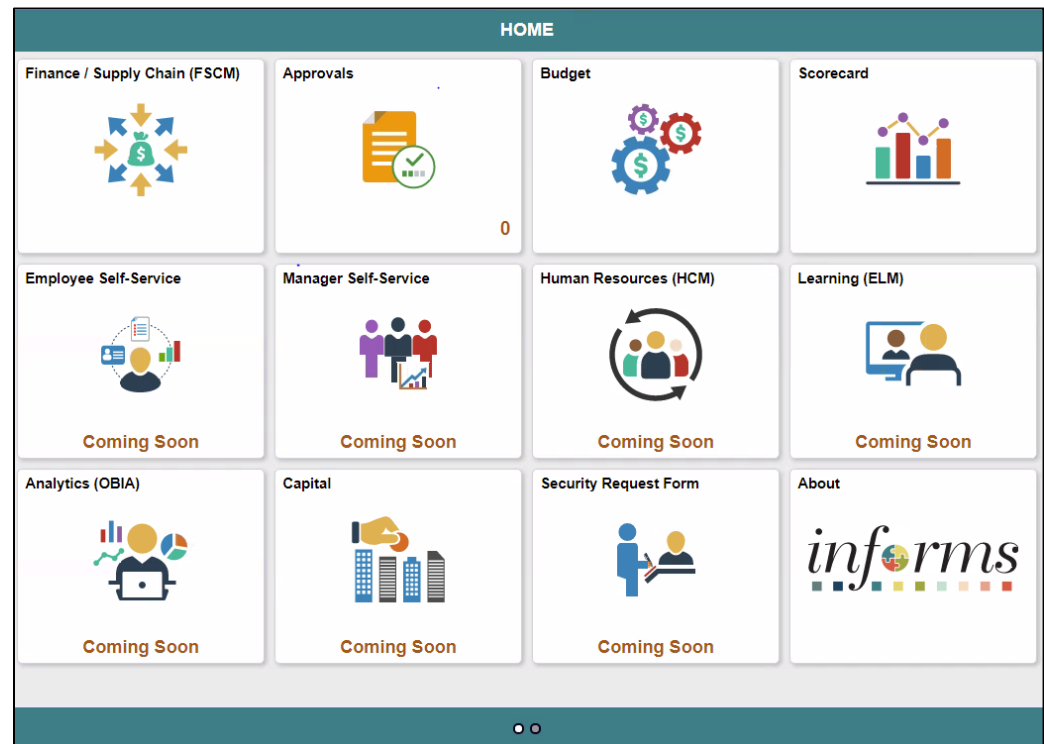
Term	Definition
Dashboard	The home page for the INFORMS application that displays the main menu for easy navigation. The Dashboard lays out links, which users can personalize their content and includes a favorites bar for frequently visited content. There are also header links for quick customization. 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 (SSO)	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 automatically log in using Single Sign-on (SSO) authentication after selecting the INFORMS link.
- Single Sign-On (SSO) utilizes your current County Active Directory credentials.
- Users that do not have Single Sign-On (SSO) 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: This lesson will review Key Features on the INFORMS Home Page.

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 fluid 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

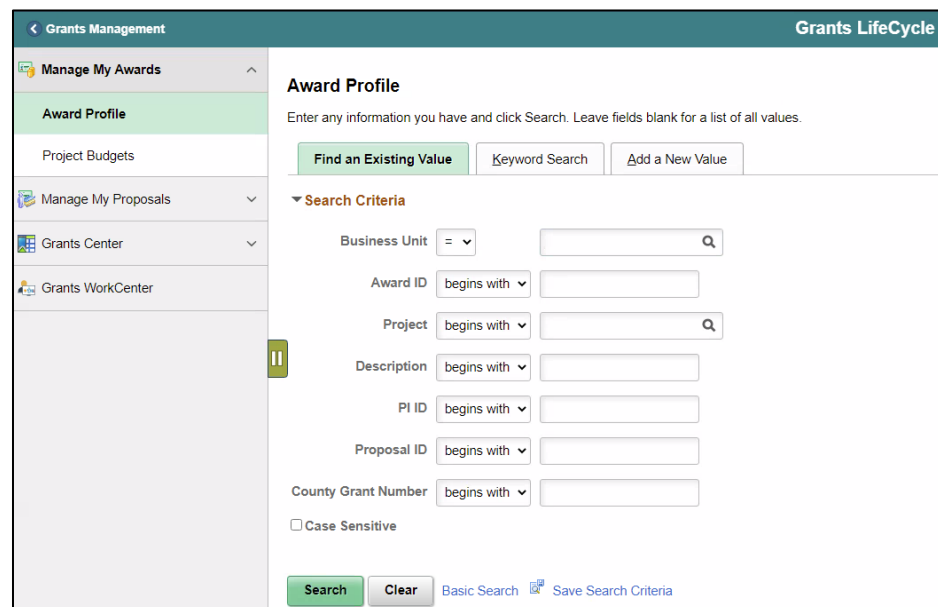
Lecture 3: Key Elements of Tiles

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 Grants Management dropdown will show all the Tiles related to Grants. 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 Grants Tile will direct users to the Award Profile component.



Grants Management Grants LifeCycle

Manage My Awards

- Award Profile**
- Project Budgets

Manage My Proposals

- Grants Center
- Grants WorkCenter

Award Profile

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

Find an Existing Value **Keyword Search** **Add a New Value**

Search Criteria

Business Unit

Award ID begins with

Project begins with

Description begins with

PI ID begins with

Proposal ID begins with

County Grant Number begins with

☐ Case Sensitive

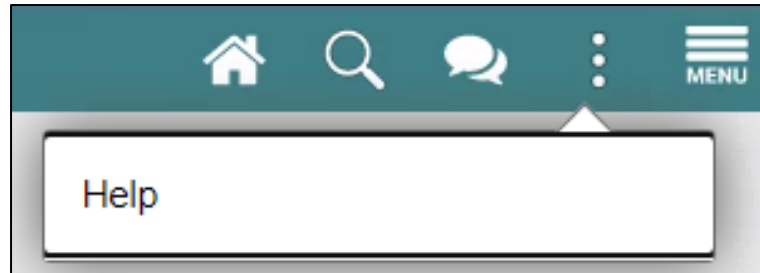
Search **Clear** [Basic Search](#) [Save Search Criteria](#)

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.

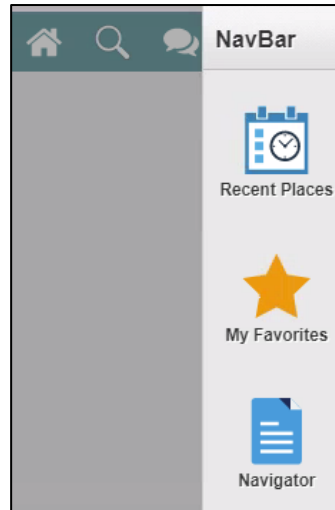





Lesson 1: Logging in to and Navigating INFORMS

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.

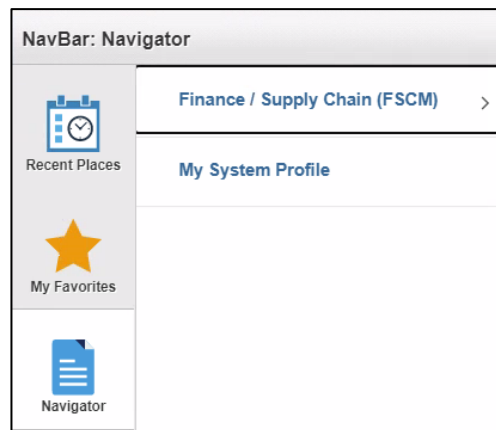


Icon	Description
 Recent Places	Recent Places. Displays links to the pages recently visited by the current users.
 My Favorites	My Favorites. Displays any specified favorite pages. Favorites can be added through the Add to Favorites link.
 Navigator	Navigator. Displays the traditional menu structure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

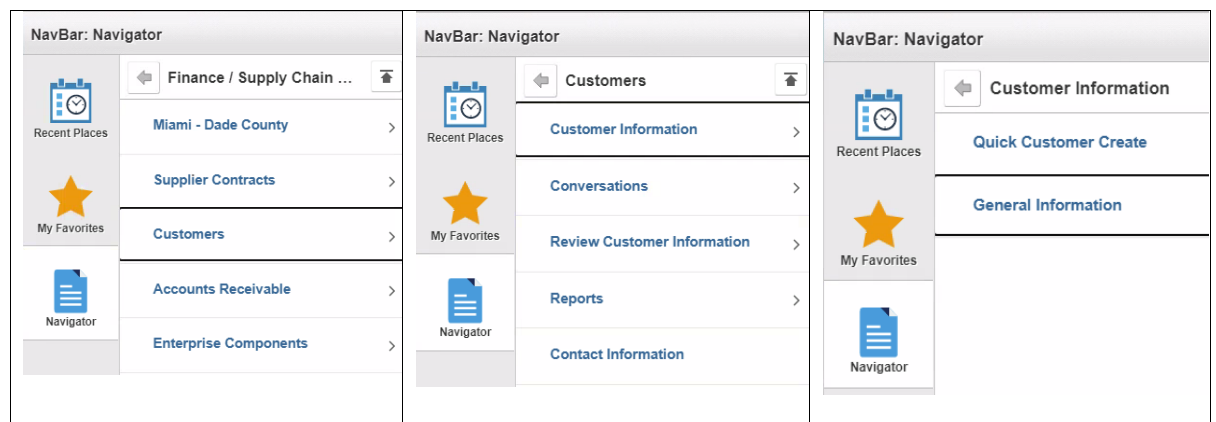
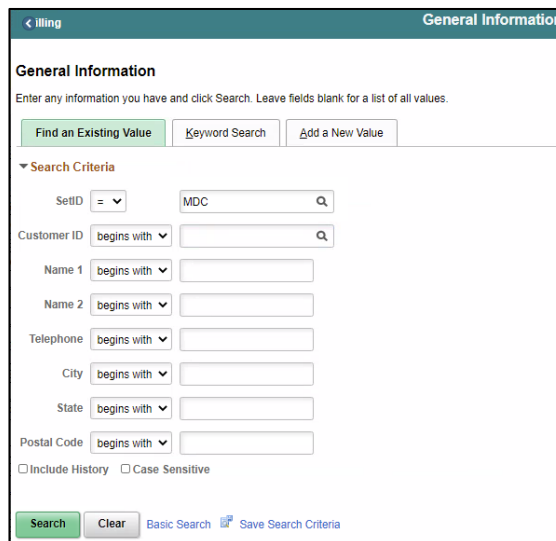
- Selecting the **Navigator** shows all the module menus that users have access to.

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, **Customer > Customer Information > General Information** will direct users to the Customer Master Tile. Again, only if users have the appropriate security access.

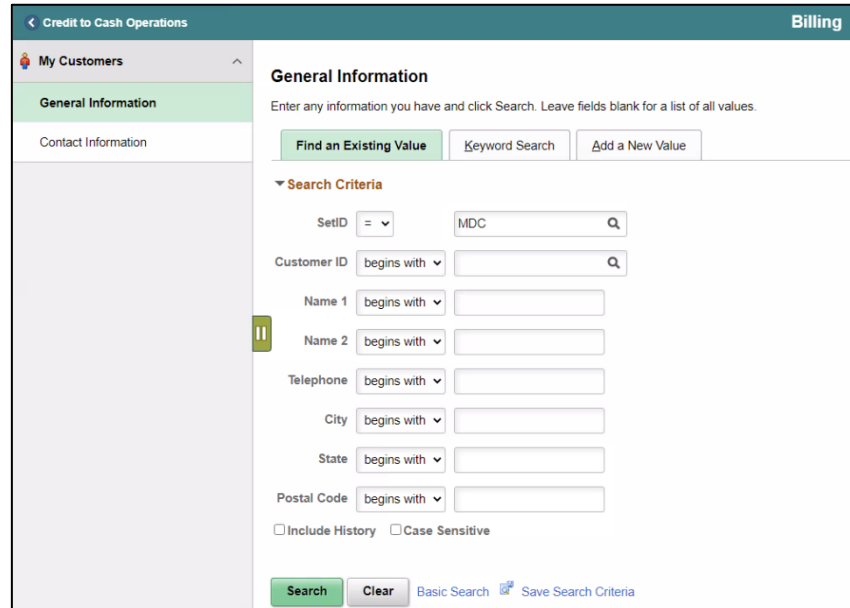



The screenshot shows the 'General Information' form for Customer Master. It has a title bar with '< Billing' and 'General Information'. Below the title bar is a section for 'General Information' with a description: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are three buttons: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. Below these is a 'Search Criteria' section with various fields: 'SetID' (dropdown), 'MDC' (text), 'Customer ID' (dropdown), 'Name 1' (dropdown), 'Name 2' (dropdown), 'Telephone' (dropdown), 'City' (dropdown), 'State' (dropdown), and 'Postal Code' (dropdown). There are also checkboxes for 'Include History' and 'Case Sensitive'. At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

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 **General Information** is the selected component link in **My Customers** folder.

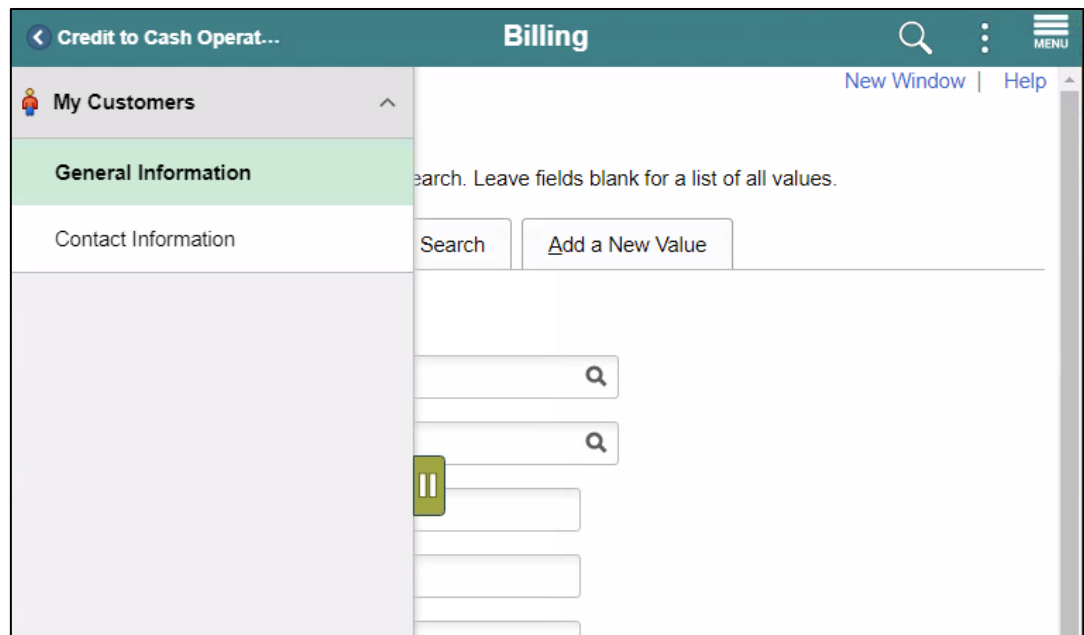


The screenshot displays the 'My Customers' interface within the 'Credit to Cash Operations' module. The left sidebar shows a navigation tree with 'My Customers' selected, containing sub-items like 'General Information' and 'Contact Information'. The main panel is titled 'General Information' and includes a search bar with buttons for 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. Below the search bar, there is a 'Search Criteria' section with various input fields: 'SetID' (dropdown), 'Customer ID' (dropdown), 'Name 1' (dropdown), 'Name 2' (dropdown), 'Telephone' (dropdown), 'City' (dropdown), 'State' (dropdown), and 'Postal Code' (dropdown). Each dropdown is followed by a 'begins with' label and a search icon. At the bottom, there are checkboxes for 'Include History' and 'Case Sensitive', and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

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



Now that you have completed the Logging in to and Navigating INFORMS lesson, you 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, you will be able to:

- How to add Favorites
- Using WorkCenters

Lesson 2: Setting Up INFORMS for Your Work

Key Terms



The following key terms are used in this lesson:

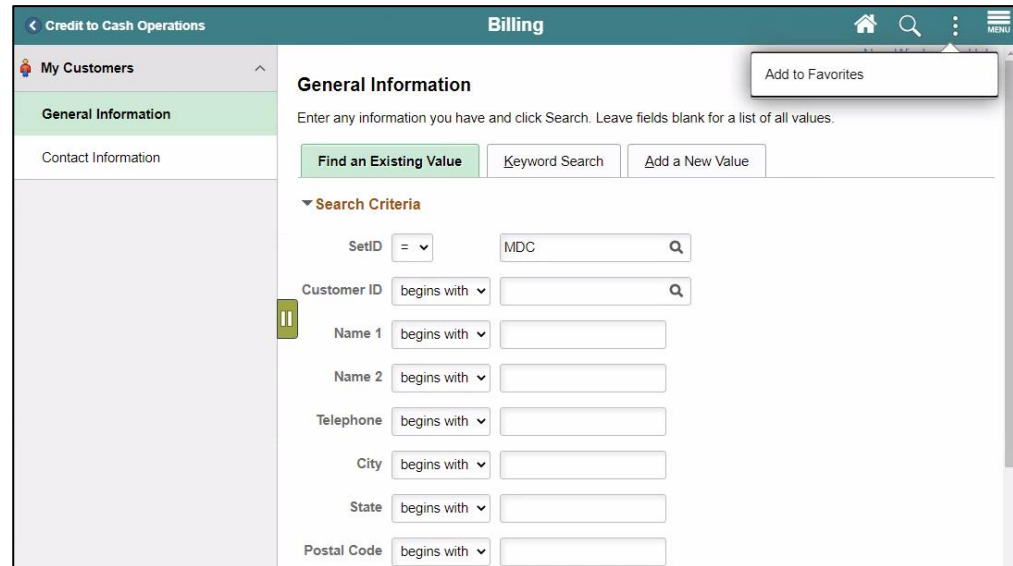
Term	Definition
WorkCenter	A Dashboard for users to manage their workload. It is a one-stop-shop for users performing different business transactions to take action on alerts and view reports and analytics. The built-in intelligence delivers work to users instead of users searching for information. It makes multitasking easy and seamless.

Lesson 2: Setting Up INFORMS for Your Work

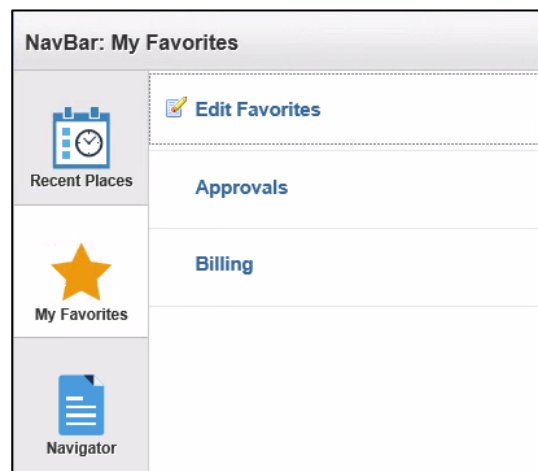
Lecture 1: How to add Favorites

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.

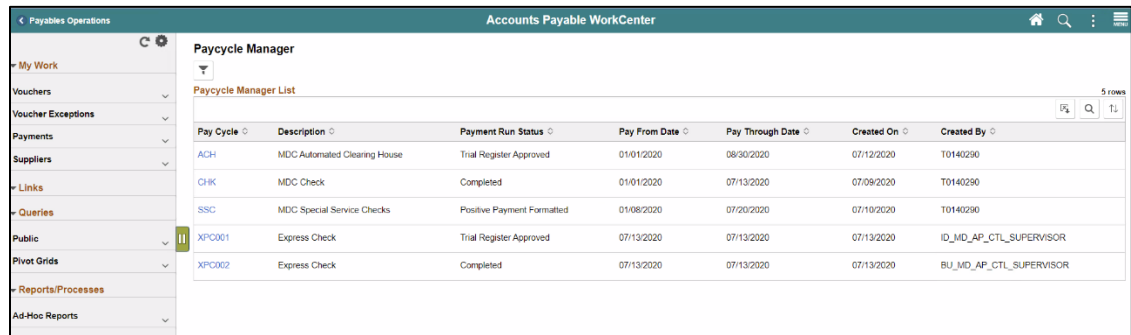


Lesson 2: Setting Up INFORMS for Your Work

Lecture 2: Using WorkCenters

This section will discuss the usage of INFORMS WorkCenters.

- WorkCenters are designed for specific roles and provide a central area for users to access key components within Financial and Supply Chain applications.
- WorkCenters enable users to access various pages and perform daily tasks without leaving the WorkCenter, which reduces the time used when navigating through menus.



Pay Cycle	Description	Payment Run Status	Pay From Date	Pay Through Date	Created On	Created By
ACH	MDC Automated Clearing House	Trial Register Approved	01/01/2020	08/30/2020	07/12/2020	T0140290
CHK	MDC Check	Completed	01/01/2020	07/13/2020	07/09/2020	T0140290
SSC	MDC Special Service Checks	Positive Payment Formatted	01/08/2020	07/20/2020	07/10/2020	T0140290
XPC001	Express Check	Trial Register Approved	07/13/2020	07/13/2020	07/13/2020	ID_MD_AP_CTL_SUPERVISOR
XPC002	Express Check	Completed	07/13/2020	07/13/2020	07/13/2020	BU_MD_AP_CTL_SUPERVISOR

- All WorkCenters are composed of 2 tabs.
 - The **Main Tab** has 2 sections - **My Work** and **Links**.
 - The **Reports/Queries** tab also has 2 sections - **Queries** and **Reports and Processes**.
- WorkCenters also provide a Welcome pane, which is displayed to the right. A Welcome page explains some of the basic icons that are used throughout the WorkCenter. If a system administrator or an end-user (if given access rights) selects the Starting Page checkbox on the Configure Pagelets component for My Work, Links, Queries, or Reports/Processes, then the option selected replaces the Welcome page in this pane.
- The content of the WorkCenters will coincide with the module the WorkCenter belongs to. Additionally, the queries available are the reports of the processing of transactions in the module. Similarly, the pages will start with the most common pages needed to access to get through transactions for the module.
- The following module have WorkCenters:

Buyer	General Ledger
Treasury	Accounts Payable
Billing	Contract / Sourcing
Grants	Asset Management
Receivable	Projects
Contracts	

Lesson 2: Lesson Summary

Lesson Summary



Now that you have completed the Setting Up INFORMS for Your Work lesson, you should be able to:

- How to Add Favorites
- Using WorkCenters

○ 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.



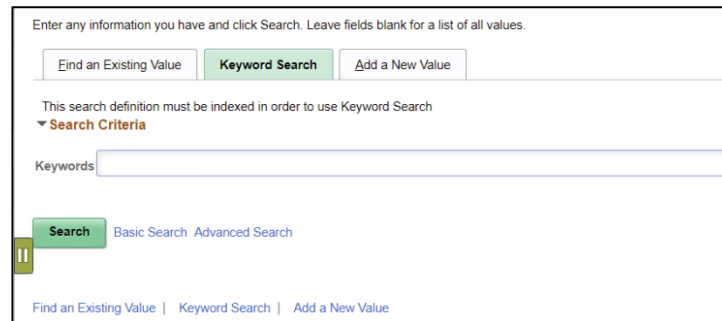
Term	Definition
Component	An INFORMS Component is a collection of pages that are logically grouped.
Wildcards	Characters that assist with the search function. The three wildcards are the percent sign (%), which directs the search function to match one or more characters in the search box; the underscore (_), 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: How to Find Data

This lesson will review finding existing values.

- 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.

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


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


▼ **Search Criteria**


SetID = 

Supplier ID contains

Persistence =


Short Supplier Name contains 

Our Customer Number contains 

Supplier Name contains 

Financial Sanctions Status =

☐ Include History
 ☐ 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 enter the word Administrator in the **Description** field and the search criterion for that field is set to contain, then INFORMS narrows the search by displaying all profiles that contain Solutions in the description. 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.

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

Find an Existing Value | Keyword Search | Add a New Value

▼ Search Criteria

SetID = MDC

Supplier ID contains

Persistence =

Short Supplier Name contains

Our Customer Number contains

Supplier Name contains solutions

Financial Sanctions Status =

☐ Include History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All 1-100 of 226

SetID	Supplier ID	Persistence	Short Supplier Name	Our Customer Number	Supplier Name
MDC	0000005159	Regular	360 ENERGY-001	(blank)	360 ENERGY SOLUTIONS LLC
MDC	0000011931	Regular	360 LUBRIC-001	(blank)	360 LUBRICANT SOLUTIONS LLC
MDC	0000012746	Regular	A&O HOME S-001	(blank)	A&O HOME SOLUTIONS LLC
MDC	0000004666	Regular	ABSOLUTE C-001	(blank)	ABSOLUTE CIVIL ENGINEERING SOLUTIONS LLC

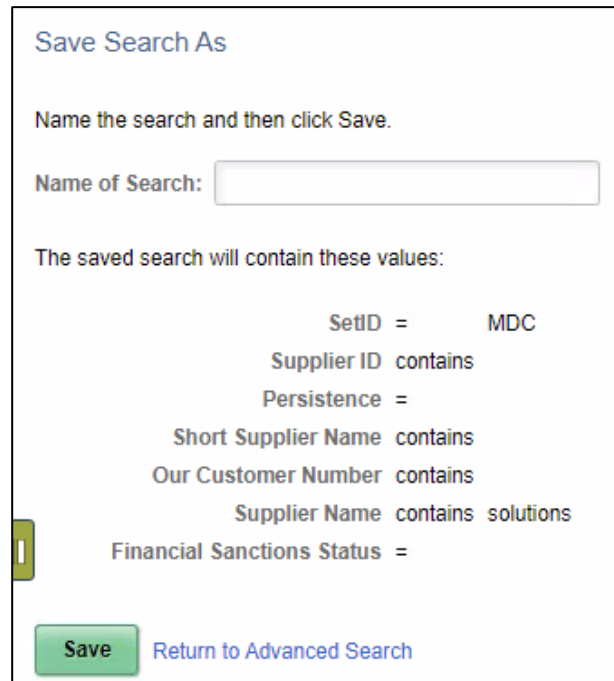
- Using Operators.** when performing an advanced search, users can use a variety of operators to narrow searches. For example, users can search for customers by first letter, by values that are less than or greater than a specified amount, etc. Operator examples include.

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



- **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

Professional Details

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

Instructor:

begins with ▼

Last Name:

begins with ▼


First Name:

begins with ▼

☐ Include History ☐ Correct History ☐ Case Sensitive

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.



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







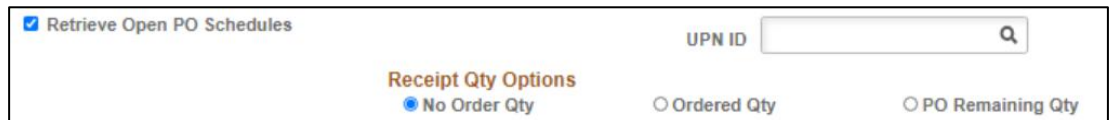
- **Drop-Down List Boxes.** To select a single item from the list, search the down arrow to display the list, scroll through the list until users choice is visible, and then search the desired list item. The list closes and the selected value appears in the list box. Users can also type the first letter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



Now that you have completed the Entering and Finding Data in INFORMS lesson, you should be able to:

- How to Find Data
- How to Enter Data

Lesson 4: INFORMS Approvals

Lesson 4: Overview

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

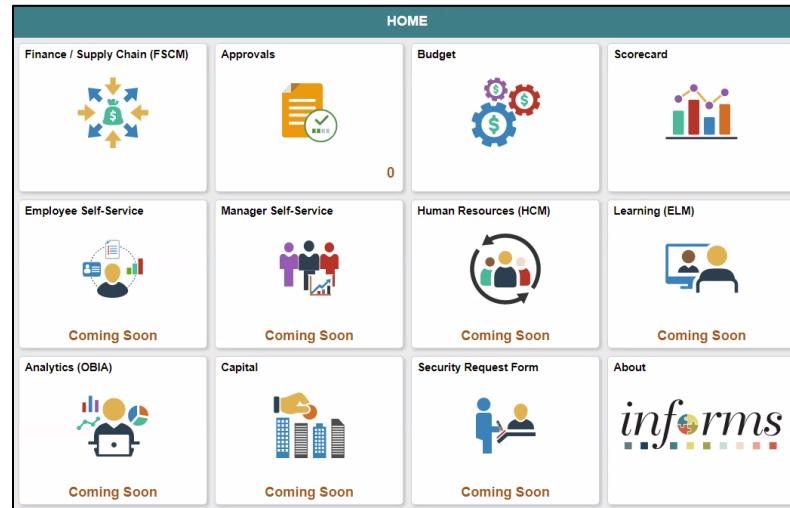
- Navigate to the Approval Worklist
- Understand Approval Components
- Understand the Approval Chain

Lesson 4: INFORMS Approvals

Lecture 1: INFORMS Approvals

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

- 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.

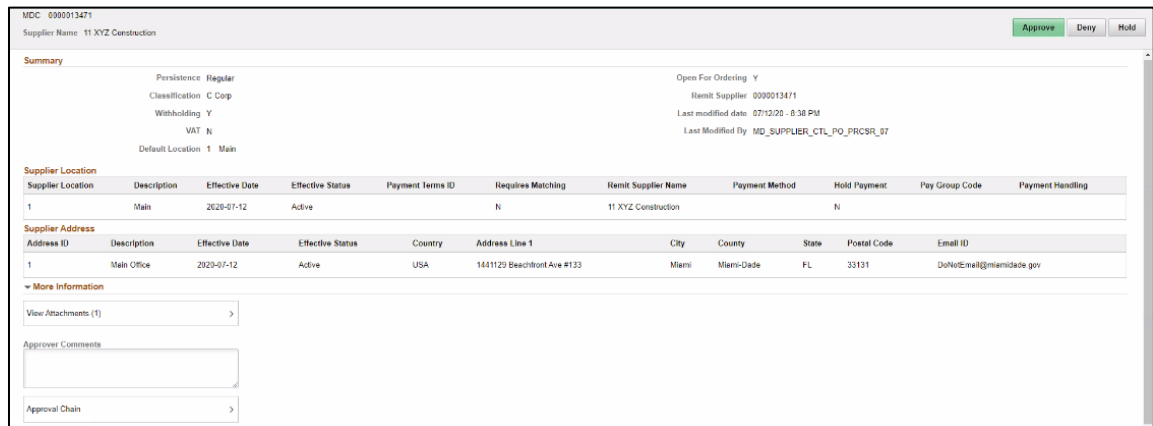
Employee Self-Service		Pending Approvals		
View By	Type	Supplier	MDC / 0000013473 MD_SUPPLIER_CTL_PO_PRCR_01	Routed 07/13/2020
All	14	Supplier	MDC / 0000013479 MD_SUPPLIER_CTL_PO_PRCR_03	Routed 07/14/2020
Supplier	11	Supplier	MDC / 0000013477 MD_SUPPLIER_CTL_PO_PRCR_01	Routed 07/14/2020
Supplier Change Request	2	Supplier	MDC / 0000013480 MD_SUPPLIER_CTL_PO_PRCR_02	Routed 07/14/2020
Supplier Registration	1	Supplier	MDC / 0000013483 MD_SUPPLIER_CTL_PO_PRCR_02	Routed 07/14/2020
		Supplier	MDC / 0000013482 MD_SUPPLIER_CTL_PO_PRCR_02	Routed 07/14/2020
		Supplier	MDC / 0000013484 MD_SUPPLIER_CTL_PO_PRCR_02	Routed 07/15/2020
		Supplier	MDC / 0000013485 MD_SUPPLIER_CTL_PO_PRCR_01	Routed 07/15/2020
		Supplier	MDC / 0000013486 MD_SUPPLIER_CTL_PO_PRCR_01	Routed 07/15/2020
		Supplier	MDC / 0000013487 MD_SUPPLIER_CTL_PO_PRCR_01	Routed 07/15/2020
		Supplier Change Request 1	0000000001 / RAUL J GARCIA / Pending Approval	Routed 09/18/2020
		Supplier Registration	MDC / 0000000001 MD_SUPPLIER_CTL_PO_PRCR_05	Routed 09/22/2020
		Supplier Change Request	0000000005 / Bank of America NA / Pending Approval	Routed 09/24/2020

- 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.



MDC 0000013471
Supplier Name: 11 XYZ Construction

Summary

Persistence: Regular
Classification: C Corp
Withholding: Y
VAT: N
Default Location: 1 Main

Open For Ordering: Y
Remit Supplier: 0000013471
Last modified date: 07/12/25 - 8:38 PM
Last Modified By: MD_SUPPLIER_CTL_PO_PRCBRL_07

Supplier Location

Supplier Location	Description	Effective Date	Effective Status	Payment Terms ID	Requires Matching	Remit Supplier Name	Payment Method	Hold Payment	Pay Group Code	Payment Handling
1	Main	2020-07-12	Active		N	11 XYZ Construction		N		

Supplier Address

Address ID	Description	Effective Date	Effective Status	Country	Address Line 1	City	Country	State	Postal Code	Email ID
1	Main Office	2020-07-12	Active	USA	1441129 Beachfront Ave #133	Miami	Miami-Dade	FL	33131	DuNoE@mail@miamidade.gov

More Information

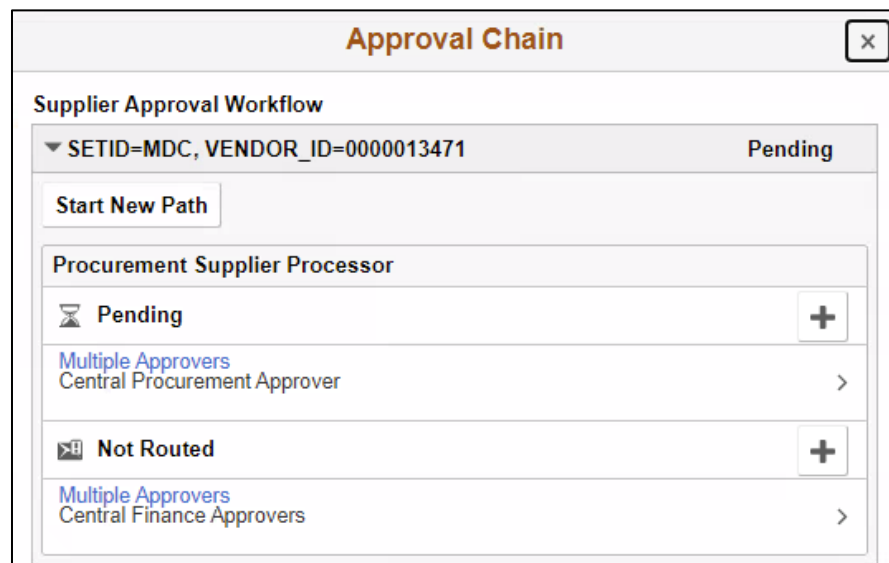
View Attachments (1) >

Approver Comments

Approval Chain >

Approve Deny Hold

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




Approval Chain

Supplier Approval Workflow


▼ SETID=MDC, VENDOR_ID=0000013471 Pending

Start New Path

Procurement Supplier Processor

 Pending +

[Multiple Approvers](#)
Central Procurement Approver >

 Not Routed +

[Multiple Approvers](#)
Central Finance Approvers >

Lesson 4: INFORMS Approvals

Lesson Summary



Now that you have completed the INFORMS Approvals lesson, you should be able to:

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

Module 3: INFORMS Reporting

Lessons

This module includes the following lessons.

- How to run reports in INFORMS
- How to run Queries in INFORMS
- INFORMS BI Publisher Reporting

○ Lesson 1: How to Run Reports in INFORMS

Overview

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

- Run reports in INFORMS
- Use the Report Manager

Lesson 1: How to Run Reports in INFORMS

Key Terms

The following key terms are used in this Lesson.



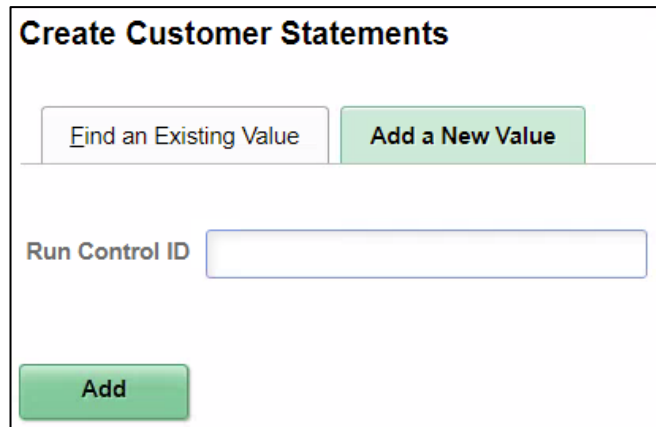
Term	Definition
PeopleTools	PeopleTools provides the underlying technology for INFORMS applications. All INFORMS applications are built, deployed and maintained using PeopleTools.
Process Scheduler	The primary role of Process Scheduler is to support the INFORMS application environment. With the INFORMS application, users might want to perform certain processes (such as running programs, batch programs, reports and so on) in the background of the online system.
Report Manager	Report Manager provides a single place where the users can view previously run reports.
Run Control ID	A run control is a database record that provides values for report settings. Instead of entering the same values each time the users runs a report, users create and save a run control with those settings. The next time users run the report, users select the run control and INFORMS fills in the settings.

Lesson 1: How to Run Reports in INFORMS

Lecture 1: How to run reports in INFORMS

This lesson will review Running INFORMS Reports.

- There are two ways to run reports in INFORMS.
 - Process Scheduler Reporting
 - Reporting Tools
- **Process Scheduler Reports** usually come with a Run Control Page. The run control page facilitates the capturing of the parameters needed to run the reports. These will then use the process definitions that are already built or pre-built in INFORMS (such as Application Engines) to generate the report.

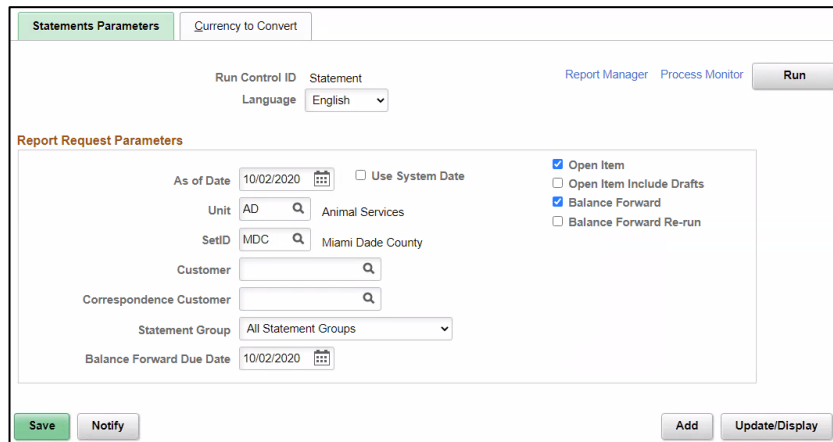


Create Customer Statements

Find an Existing Value Add a New Value

Run Control ID

Add



Statements Parameters Currency to Convert

Run Control ID Statement Report Manager Process Monitor Run

Language English

Report Request Parameters

As of Date 10/02/2020 ☐ Use System Date ☒ Open Item

Unit AD Animal Services ☐ Open Item Include Drafts

SetID MDC Miami Dade County ☒ Balance Forward

Customer ☐ Balance Forward Re-run

Correspondence Customer

Statement Group All Statement Groups

Balance Forward Due Date 10/02/2020

Save Notify Add Update/Display

- **INFORMS Reporting Tools** span wide-ranging information access needs of the organization, from end-users querying and exploration to multidimensional reporting and analysis, to production reporting.
- Each tool has its own manager and viewer to search and run an existing report.

Lesson 1: How to Run Reports in INFORMS

Lecture 1: How to run reports in INFORMS

- Reporting Tools include the following technologies.
 - Queries. INFORMS Query provides a user-friendly, intuitive way to generate ad-hoc and scheduled reports quickly from any data stored in INFORMS tables. The queries include Composite Queries, INFORMS Query and Connected Query. Below is the sample from INFORMS Query.

Query Viewer

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query

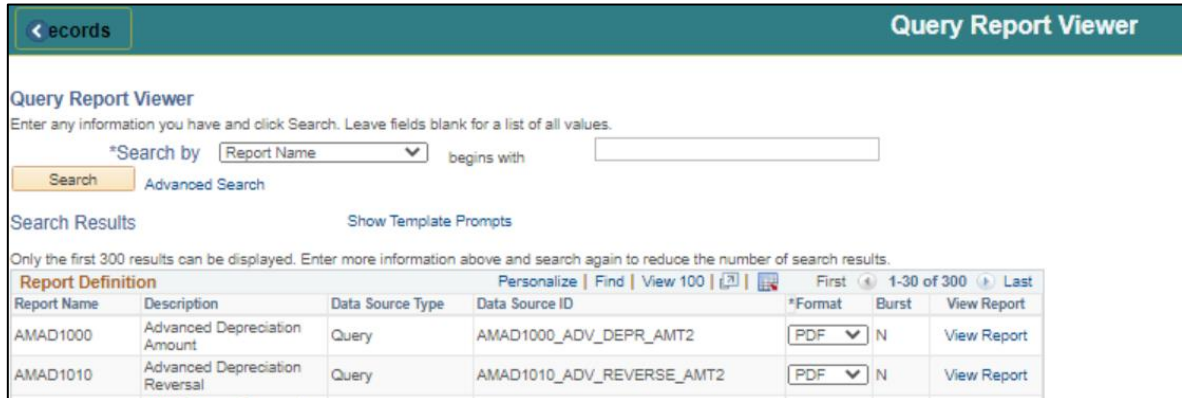
1-30 of 159 | View 100

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
AMAS1100__ASSET_CATEGORIES	Asset Categories	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
APY0005_SPEEDCHARTS	SpeedCharts	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
APY0006_TAX_AUTHORITIES	Tax Authorities	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
APY0007_TAX_CODES	Tax Codes	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
APY0010_BUSINESS_UNIT_LIST	Business Unit List	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
APY0012_ACCTG_ENTRY_TMPLT	Accounting Entry Template	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
APY1070_AP_SBI_VENDOR	AP SBI Suppliers	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Lesson 1: How to Run Reports in INFORMS

Lecture 1: How to run reports in INFORMS

- **BI Publisher.** Oracle provides a standalone Java-based reporting technology named BI Publisher (BIP) that streamlines reports and form generation. BIP separates the data extraction process from the report layout. BI Publisher for INFORMS provides an environment for the power business users to manage templates, data sources, reports, translations, content components and to produce reports according to a user's-defined criterion.



Query Report Viewer

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

*Search by Report Name begins with

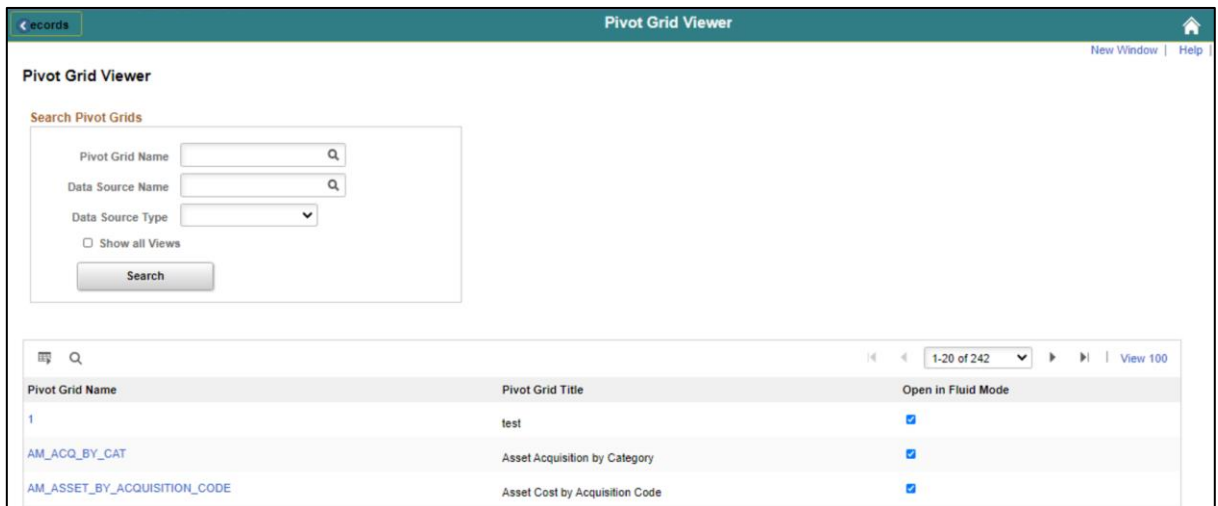
[Advanced Search](#)

Search Results [Show Template Prompts](#)

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

Report Name	Description	Data Source Type	Data Source ID	*Format	Burst	View Report
AMAD1000	Advanced Depreciation Amount	Query	AMAD1000_ADV_DEPR_AMT2	PDF	N	View Report
AMAD1010	Advanced Depreciation Reversal	Query	AMAD1010_ADV_REVERSE_AMT2	PDF	N	View Report

- **Pivot Grid.** INFORMS Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table and chart representation of data using INFORMS Query data source. The framework also enables users to see different views of the data as in a Microsoft Excel pivot table and the same data is also available in a chart view.



Pivot Grid Viewer

[Search Pivot Grids](#)

Pivot Grid Name

Data Source Name

Data Source Type

☐ Show all Views

Pivot Grid Name	Pivot Grid Title	Open in Fluid Mode
1	test	<input checked="" type="checkbox"/>
AM_ACQ_BY_CAT	Asset Acquisition by Category	<input checked="" type="checkbox"/>
AM_ASSET_BY_ACQUISITION_CODE	Asset Cost by Acquisition Code	<input checked="" type="checkbox"/>

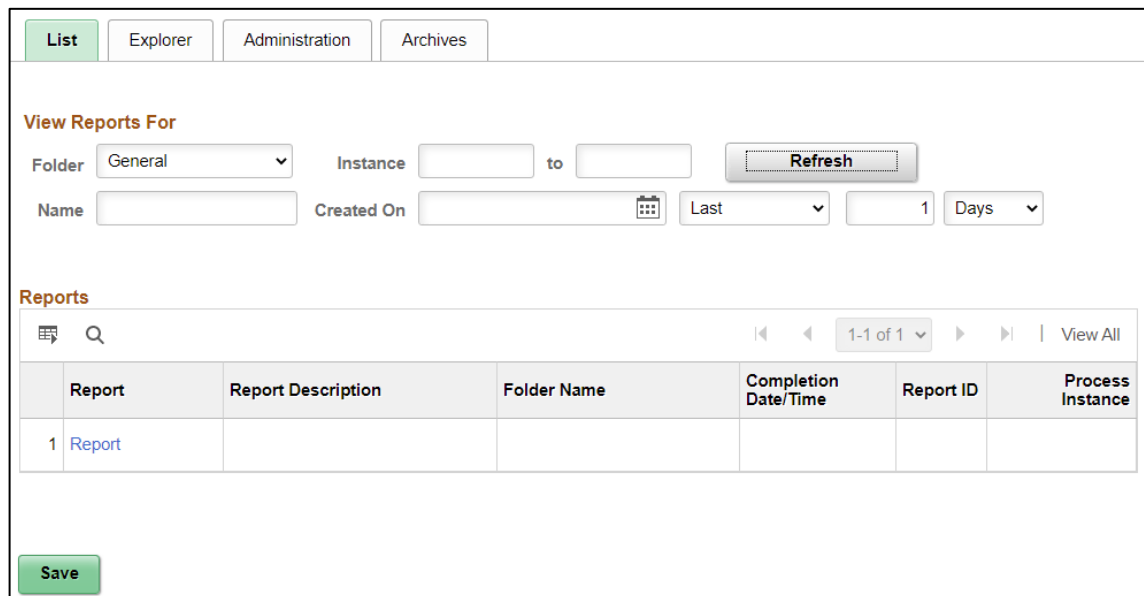
- Similarly, as stated in Module 2, the reports that users will need for operations will be published in the WorkCenters of each module.

Lesson 1: How to Run Reports in INFORMS

Lecture 2: This lesson will review using the **Report Manager**.

How to use the Report Manager

- The **INFORMS Process Scheduler** is a centralized tool that enables application developers, system administrators, and application users to manage INFORMS batch processes. A process can be running programs, batch programs, or reports.
- The **Report Manager** is part of the INFORMS Process Scheduler and provides a framework for viewing report output based on user privileges.
- Using the **Report Manager**, users can see all of the reports authorized to view by opening the report list. Folders are provided to assist in organizing reports and reducing the size of the report lists.



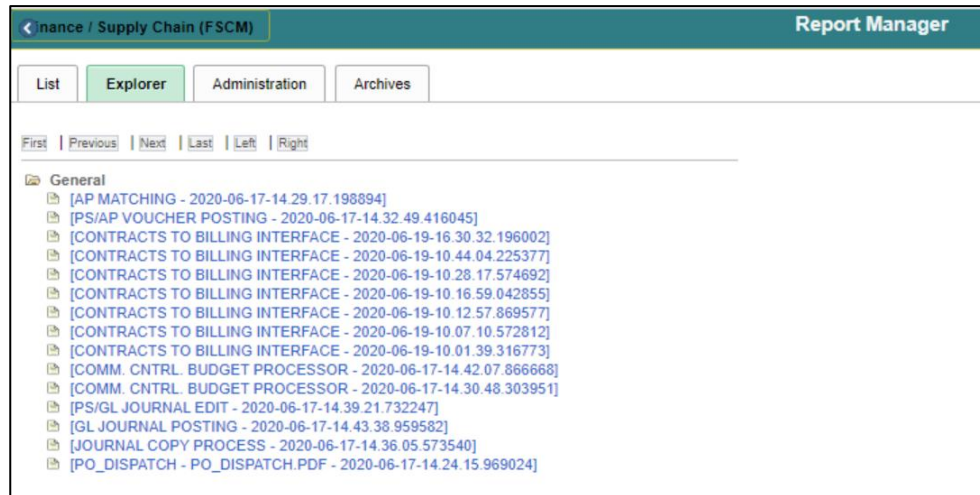
The screenshot shows the 'Report Manager' interface. At the top, there are tabs: 'List' (selected), 'Explorer', 'Administration', and 'Archives'. Below the tabs, there's a section titled 'View Reports For' with filters for 'Folder' (set to 'General'), 'Instance' (empty), 'Name' (empty), 'Created On' (empty), 'Last' (set to 'Last'), and 'Days' (set to '1'). A 'Refresh' button is also present. Below this is a section titled 'Reports' with a search bar and a table. The table has columns: 'Report', 'Report Description', 'Folder Name', 'Completion Date/Time', 'Report ID', and 'Process Instance'. There is one row with a report named 'Report'. At the bottom left, there is a 'Save' button.

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 Report					

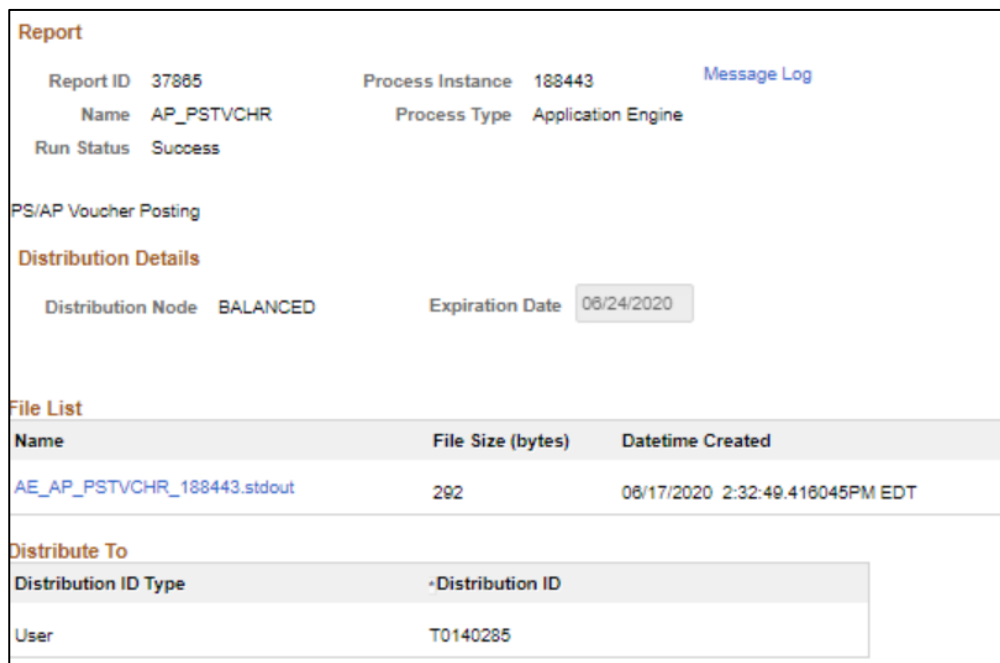
- Reporting folders are used to assist in organizing reports and reducing the size of the report lists.
- The users can view a list of reports to which users have access, or select a hierarchical view of folders and reports.

Lesson 1: How to Run Reports in INFORMS

Lecture 2: How to use the Report Manager



- Maintaining reports. Users can delete reports, add users to the distribution list, or view archived reports.
- Selecting the links of the reports in the list or tree view will direct the users to the Report Index which gives them access to view the generated reports or logs.



Lesson 1: How to Run Reports in INFORMS

Lesson Summary



Now that you have completed the How to Run Reports in INFORMS lesson, you should be able to:

- Run reports in INFORMS
- Use the Report Manager

○ Lesson 2: How to Run Queries in INFORMS

Lesson 2: Overview

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

- Know the basics of Query Reporting
- Run a pre-defined Query

Lesson 2: How to Run Queries in INFORMS

Key Terms

The following key terms are used in this Lesson.



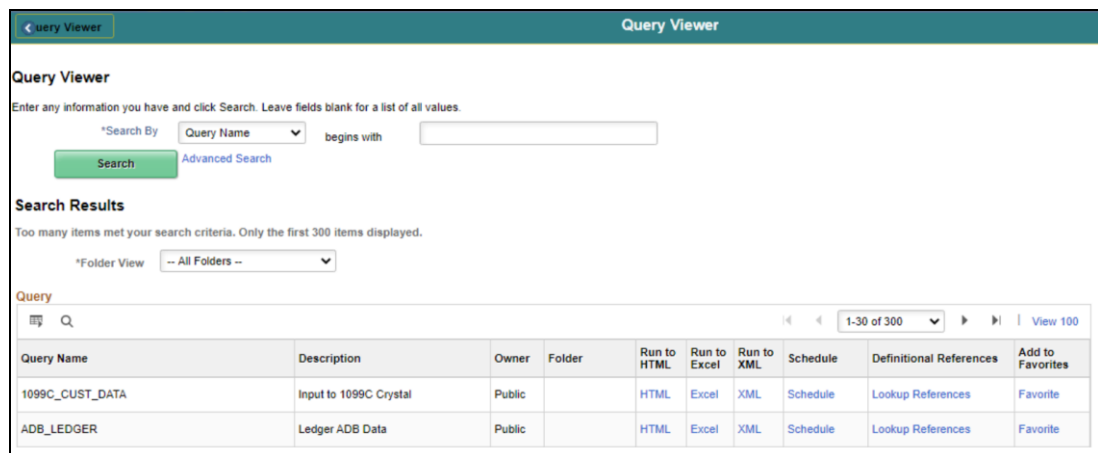
Term	Definition
INFORMS Inquiry	INFORMS pages within each module allow the users to look up existing information.
INFORMS Query	Run pre-defined specific queries to extract precise information.
Pivot Grid	INFORMS Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table and chart representation of data using INFORMS Query, Composite Query and component data source. The framework also enables users to see different views of the data, as in a Microsoft Excel pivot table and the same data is also available in a chart view.
XML	Extensible Markup Language (XML). This is used to define data to dictate how users are represented online.

Lesson 2: How to Run Queries in INFORMS

Lecture 1: The basics of Query Reporting

This lesson will review the basics of Query Reporting.

- **INFORMS Query** is an end-users reporting tool. With INFORMS Query, users can extract the precise information that users are looking for by using visual representations of the INFORMS database, without writing Structured Query Language (SQL) statements. The queries that users write can be as simple or as complex as necessary; Queries can be one-time queries or queries that users use repeatedly.
- Users can use INFORMS Query in the following ways.
 - To run queries as a separate process. Users can run queries as a separate process and have results sent to a separate browser window by searching the HTML link from Query Manager or **Query Viewer**.
 - To schedule a query. Users can schedule queries to run at predefined times or on a recurring schedule. The results of scheduled queries are routed to **INFORMS Report Manager**.
 - To download query. Download results to a Microsoft Excel spreadsheet and XML.
 - To serve as a data source for Pivot Grid models. queries are a primary data source for **INFORMS Pivot Grid**, which users can use to build Pivot Grid models (detailed in a later lesson).
 - Query can be used as a data source for Oracle BI Publisher (formally INFORMS XML Publisher). Oracle BI Publisher Report will have the same name as the Query.



Query Viewer

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

*Search By begins with

[Search](#) [Advanced Search](#)

Search Results

Too many items met your search criteria. Only the first 300 items displayed.

*Folder View

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
1099C_CUST_DATA	Input to 1099C Crystal	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
ADB_LEDGER	Ledger ADB Data	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

1-30 of 300 | [View 100](#)

Lesson 2: How to Run Queries in INFORMS

Lecture 1: The basics of Query Reporting

- Running the query will yield a new window to serve as a results display. If the query requires parameters to be filled in, the fields will need to be filled in and the **View Results** button will need to be clicked to view the data.

MDC_CA_INQ_PROT - Contracts Inquiry Prototype

Business Unit: 

Contract:

Description:

Customer ID: 

Status: 

Contract Type: 

View Results

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (17 kb)

[View All](#)

Row	Business Unit	Contract	Description	Sold To Customer	Customer Name	Contract Status	Contract Type	Contract Signed	Contract Administrator	Total Negotiated	Line Number	Line Description	Quantity	Gross Invoice Amount	Billing Plan ID
1	AD	AD180201	2016-1299 EXPANDED SAFETY NET	DHS	Department of Homeland Security	ACTIVE	CONTRACTS	03/26/2020	Team	500000.000		Grants No Match rate based	1.0000	0.000	B101
2	AD	AD180201	2016-1299 EXPANDED SAFETY NET	DHS	Department of Homeland Security	ACTIVE	CONTRACTS	03/26/2020	Team	500000.000		Grants No Match rate based	1.0000	0.000	B101

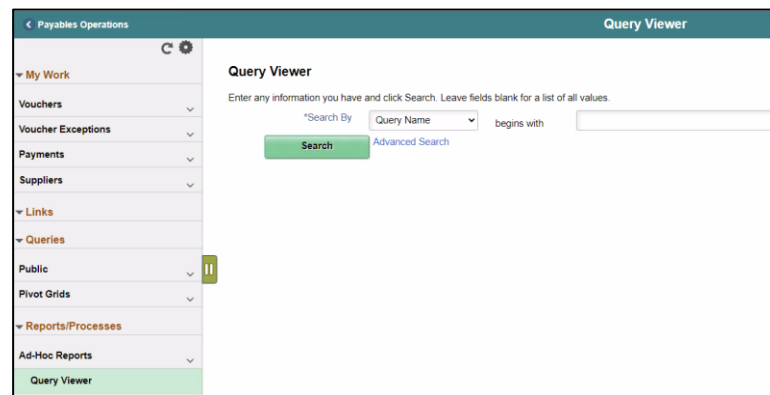
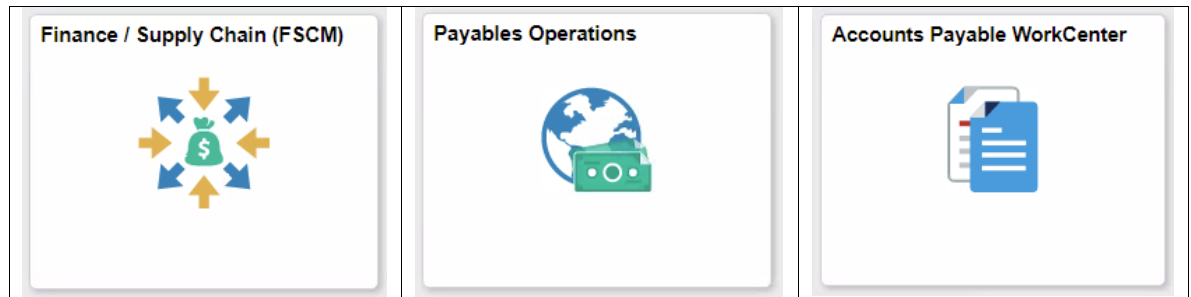
- For scheduled queries, all results are routed and viewable in the INFORMS Report Manager.

Lesson 2: How to Run Queries in INFORMS

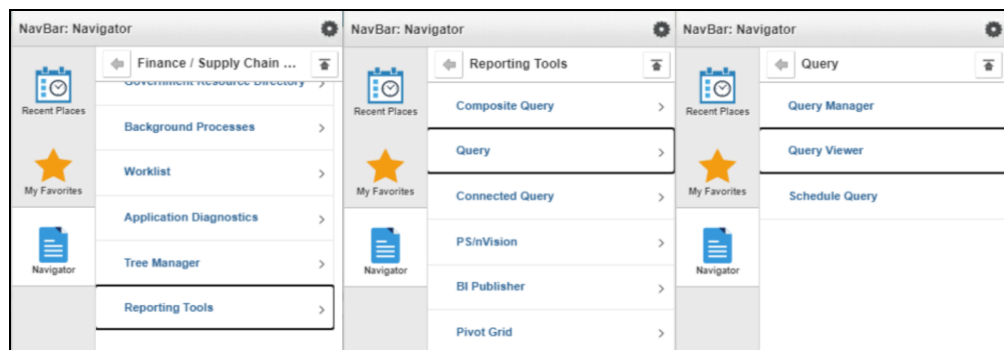
Lecture 2: This lesson will review how to run pre-defined Queries.

How to run a pre-defined Query

- The primary method to access Query Viewer is from within a user's WorkCenter. Below is an example using the Accounts payable WorkCenter.
- Finance / Supply Chain (FSCM) > Payable Operations >Accounts Payable WorkCenter > Query Viewer.**



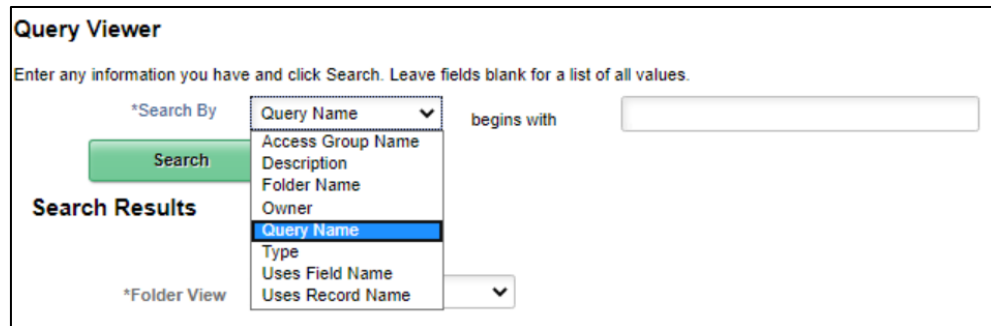
- The **Query Viewer Search Results** page can be found by using the NavBar: **Finance / Supply Chain (FSCM) > Reporting Tools > Query > Query Viewer.**



Lesson 2: How to Run Queries in INFORMS

Lecture 2: How to run a pre- defined Query

- The **Query Viewer** search page is the same as all other search pages in INFORMS. As discussed in Module 2, Lesson 3, the users may use the basic or advanced search functions to search.
- The search page defaults to the Search by Query Name. Though users have the option to search by Query Name, Description, Uses Record Name, Uses Field Name, Access Group Name and Folder Name individually.



The screenshot shows the 'Query Viewer' search interface. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there is a '*Search By' dropdown menu currently set to 'Query Name'. A green 'Search' button is to the left of the dropdown. To the right of the dropdown is a 'begins with' text input field. Below the dropdown, a list of search criteria is shown: 'Access Group Name', 'Description', 'Folder Name', 'Owner', 'Query Name' (which is highlighted in blue), 'Type', 'Uses Field Name', and 'Uses Record Name'. There is also a '*Folder View' checkbox at the bottom left of the search area.

- In advance search, the users can use the combination of the fields mentioned above to specifically look for the pre-defined queries users have access to.

Lesson 2: How to Run Queries in INFORMS

Lecture 2: How to run a pre- defined Query

Query Viewer

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

Query Name	begins with	<input type="text"/>
Description	begins with	<input type="text"/>
Uses Record Name	begins with	<input type="text"/>
Uses Field Name	begins with	<input type="text"/>
Access Group Name	begins with	<input type="text"/>
Folder Name	begins with	<input type="text"/>
*Query Type	=	User <input type="text"/>
Owner	=	<input type="text"/>

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB_EMPLOYEE,JRNL_LN.

[Basic Search](#)

Search Results

- Once the search parameters are set, users just need to search, and the results are displayed in the grid at the bottom of the page.

Query Viewer

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
MDC_CA_INQ_PROT	Contracts Inquiry Prototype	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

- The users can download the query output and view the query results as an excel, or PDF file. To run a query, use the following links on the row of the query.
 - HTML.** Select to generate an HTML version of the query.
 - Excel.** Select to download the query to a Microsoft Excel spreadsheet.
 - Schedule.** Select to schedule a time for the query to run.
 - XML.** Select to download query results to the browser as a web browser format. Some options enable users to open, save, or cancel the downloaded file.

Lesson 2: How to Run Queries in INFORMS

Lesson Summary



Now that you have completed the How to Run Queries in INFORMS lesson, you should be able to:

- Know the basics of Query Reporting
- Run a pre-defined Query



Lesson 3: BI Publisher Reporting

Lesson 3: Overview

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

- Run BI Publisher Reports

Lesson 3: BI Publisher Reporting

Key Terms

The following key term is used in this Lesson:



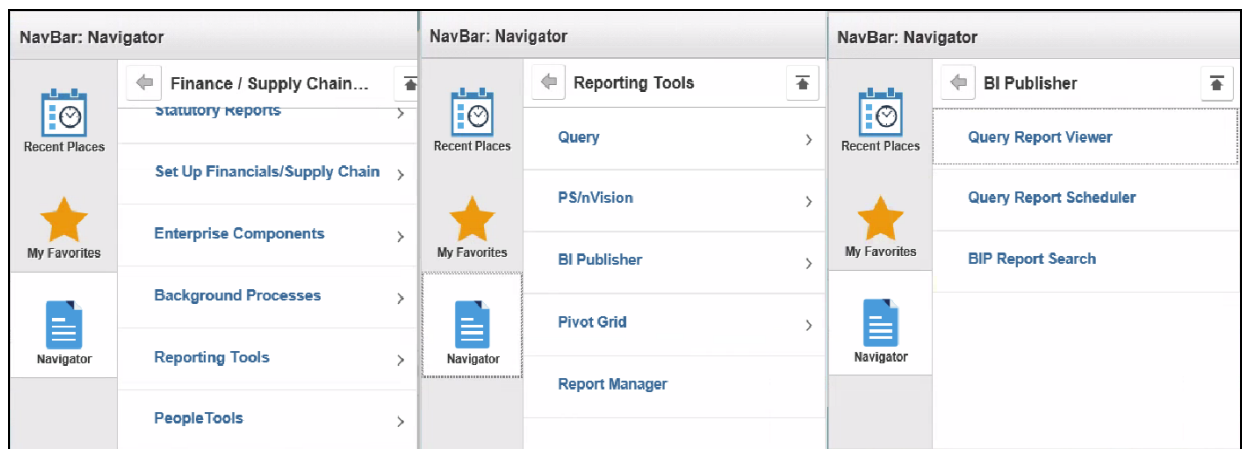
Term	Definition
BI Publisher (XML Publisher)	BI Publisher for INFORMS provides an environment for the power business users to manage templates, data sources, reports, translations, content components and to produce reports according to user-defined criteria. BI Publisher for INFORMS also can burst reports, such as annual wage statements for employees, electronically.

Lesson 3: BI Publisher Reporting

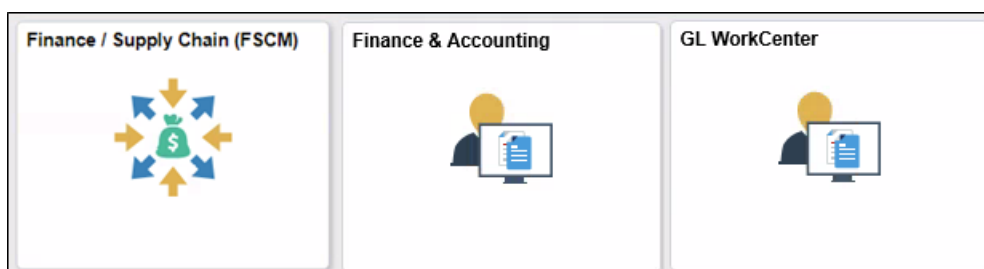
Lecture 1: This lesson will review how to run BI Publisher Reports.

Run BI Publisher Reports

- Oracle provides a standalone Java-based reporting technology named **BI Publisher (BIP)** that streamlines report and form generation. PeopleTools is leveraging this technology with BI Publisher for INFORMS, which provides native BIP technology for INFORMS Query as well as any INFORMS application.
- INFORMS Query as well as any PeopleTools based applications providing XML data are available to BI Publisher as a data source. BI Publisher for INFORMS Enterprise provides an environment for managing templates, data sources, reports, translations and content components based on the provided data source.
- Users can view and schedule query-based reports with BI Publisher. Users can run custom reports as well as query-based reports batch through the Process Scheduler or online
- Like the Query Viewer, BI Publisher has a report view page called the Query Report Viewer. This can be accessed through **Navigation. Finance / Supply Chain (FSCM) > Reporting Tools > BI Publisher > Query Report Viewer.**

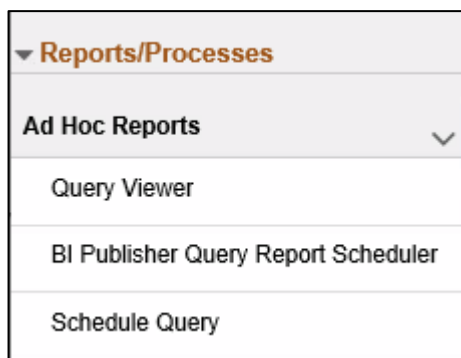


- The Query Viewer can be found in the users WorkCenter. Below is an example navigation using the Project Costing WorkCenter. **Finance / Supply Chain > Finance & Accounting > GL WorkCenter > Report/Processes > Ad Hoc Reports > Query Viewer**



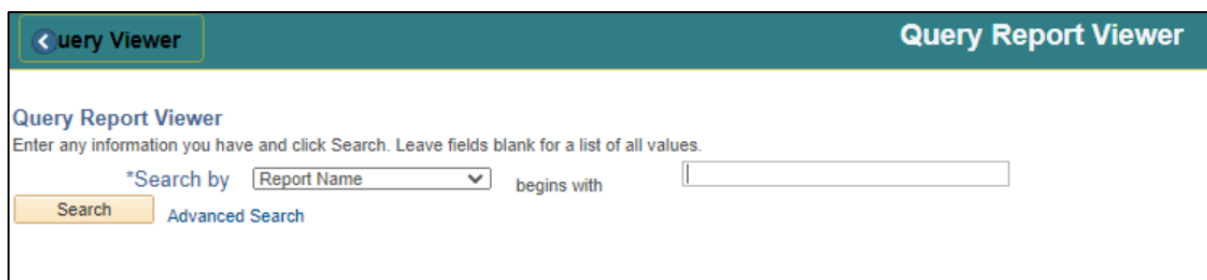
Lesson 3: BI Publisher Reporting

Lecture 1: Run BI Publisher Reports



A screenshot of a web application menu. The menu is titled "Reports/Processes" with a downward arrow. Below the title, there are four items: "Ad Hoc Reports" (with a downward arrow), "Query Viewer", "BI Publisher Query Report Scheduler", and "Schedule Query".

- The **Query Report Viewer** is very similar to Query Viewer. The search page is the same as all other search pages in INFORMS. As discussed in Module 2, Lesson 3, users may use the basic or advanced search functions to search.

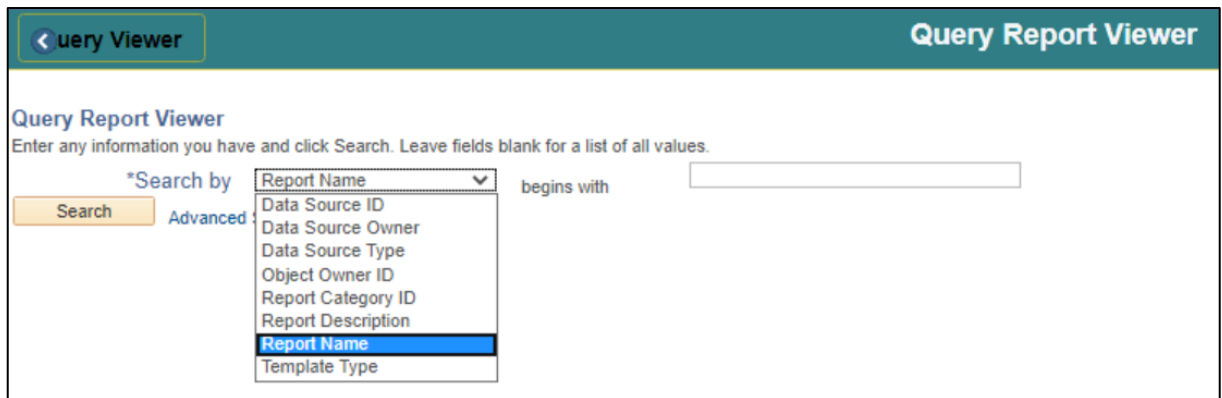


A screenshot of the "Query Report Viewer" search page. The page has a teal header with a back button labeled "Query Viewer" and the title "Query Report Viewer". Below the header, the text "Query Report Viewer" is followed by the instruction "Enter any information you have and click Search. Leave fields blank for a list of all values." The search form includes a label "*Search by" followed by a dropdown menu set to "Report Name", the text "begins with" followed by a text input field, a "Search" button, and a link for "Advanced Search".

Lesson 3: BI Publisher Reporting

Lecture 1: Run BI Publisher Reports

- The search page defaults to the **Search by Report Name**. In basic search, users have the option to search by Report Name, Description, Data Source Type, Data Source ID, Data Source Owner and Template Type individually.



Query Report Viewer

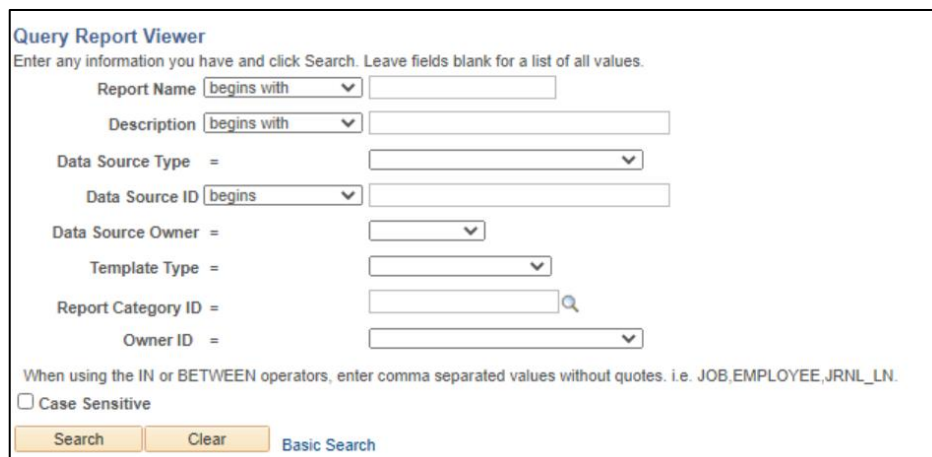
Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by **Report Name** begins with

Search **Advanced**

- Report Name
- Data Source ID
- Data Source Owner
- Data Source Type
- Object Owner ID
- Report Category ID
- Report Description
- Report Name**
- Template Type

- In advance search, the users is able to use the combination of the fields mentioned above to specifically look for the pre-defined queries users have access to.



Query Report Viewer

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

Report Name **begins with**

Description **begins with**

Data Source Type =

Data Source ID **begins**

Data Source Owner =

Template Type =

Report Category ID =

Owner ID =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

☐ Case Sensitive

Search **Clear** **Basic Search**

Lesson 3: BI Publisher Reporting

Lecture 1: Run BI Publisher Reports

- Once the search parameters are set, users just need to search and the results are then displayed in the grid at the bottom of the page.

Query Viewer
Query Report Viewer

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

*Search by Report Name begins with MD

Search Advanced Search

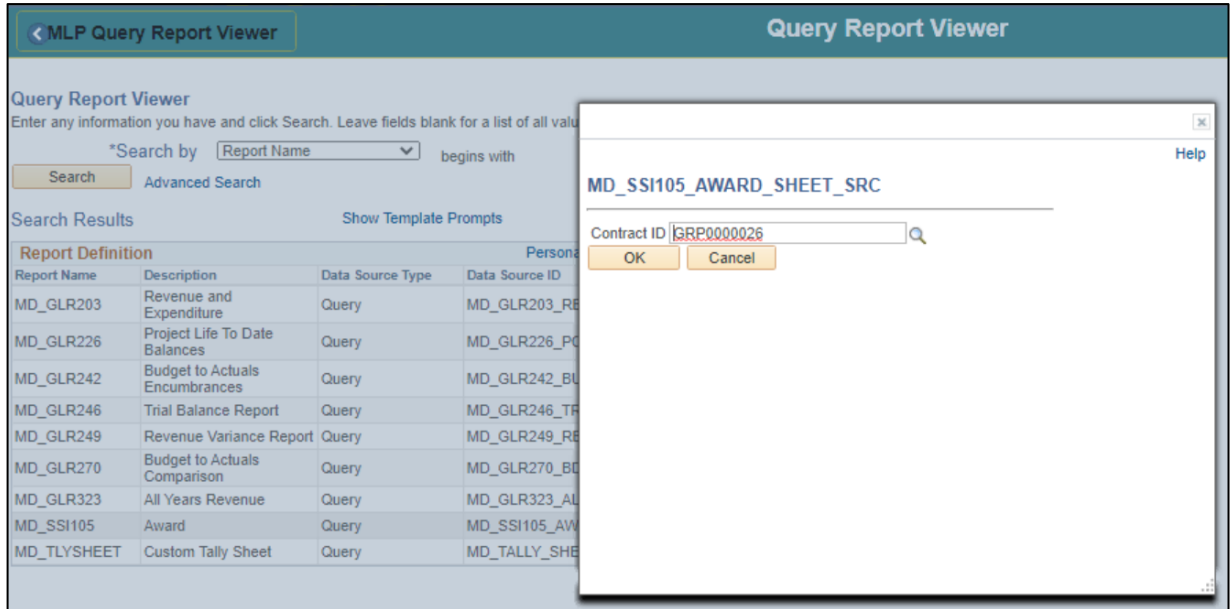
Search Results Show Template Prompts

Report Definition				Personalize	Find	View All	First	1-9 of 9	Last
Report Name	Description	Data Source Type	Data Source ID	*Format	Burst	View Report			
MD_GLR203	Revenue and Expenditure	Query	MD_GLR203_REVENUE_EXPENDITURE	PDF	N	View Report			
MD_GLR226	Project Life To Date Balances	Query	MD_GLR226_PC_LIFE_TO_DATE_QRY	XLS	N	View Report			
MD_GLR242	Budget to Actuals Encumbrances	Query	MD_GLR242_BUDGET_TO_ACTUALS	PDF	N	View Report			
MD_GLR246	Trial Balance Report	Query	MD_GLR246_TRIAL_BALANCE_REPORT	HTM	N	View Report			
MD_GLR249	Revenue Variance Report	Query	MD_GLR249_REVENUE_VARIANCE_RPT	HTM	N	View Report			
MD_GLR270	Budget to Actuals Comparison	Query	MD_GLR270_BDGT_ACTUALS_COMPARE	PDF	N	View Report			
MD_GLR323	All Years Revenue	Query	MD_GLR323_ALL_YEARS_REVENUES	RTF	N	View Report			
MD_SSI105	Award	Query	MD_SSI105_AWARD_SHEET_SRC	PDF	N	View Report			
MD_TLYSHEET	Custom Tally Sheet	Query	MD_TALLY_SHEET	XLS	N	View Report			

Lesson 3: BI Publisher Reporting

Lecture 1: Run BI Publisher Reports

- Select on the **View Report** link to view the report online. When Query runtime parameters exist, the parameters are displayed. A new window opens displaying the report results according to the runtime inputs. Users can save the report results locally by using the browser's Save functionality.



Query Report Viewer

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

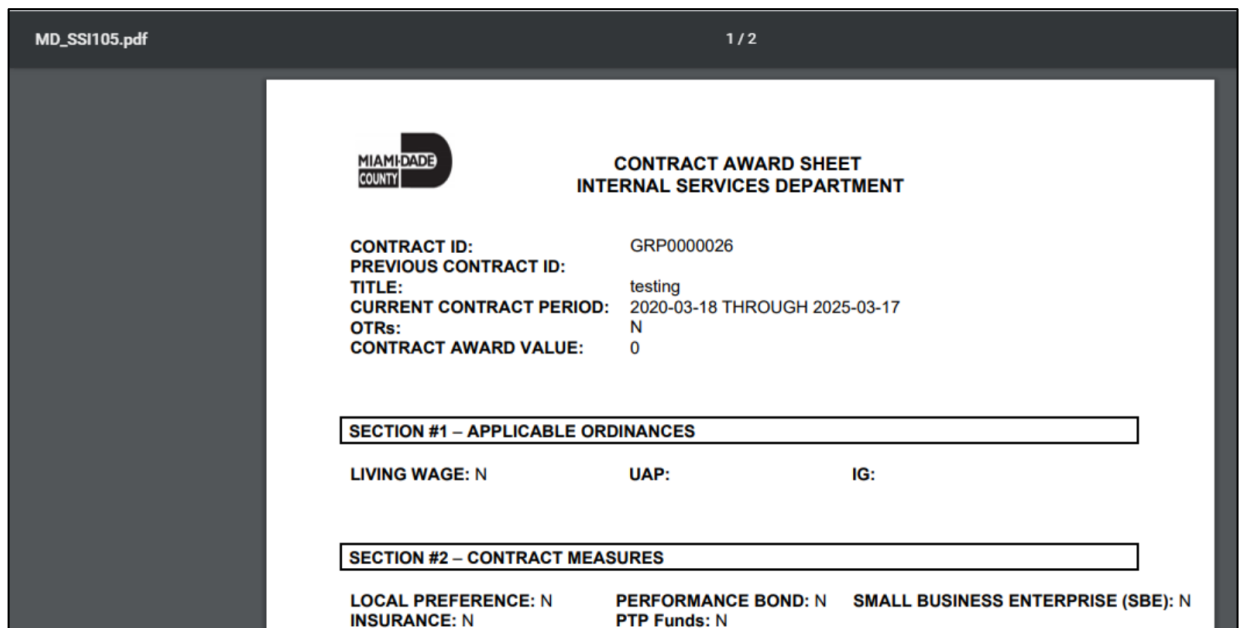
*Search by begins with

Search Results

Report Name	Description	Data Source Type	Data Source ID
MD_GLR203	Revenue and Expenditure	Query	MD_GLR203_RE
MD_GLR226	Project Life To Date Balances	Query	MD_GLR226_PO
MD_GLR242	Budget to Actuals Encumbrances	Query	MD_GLR242_BU
MD_GLR246	Trial Balance Report	Query	MD_GLR246_TR
MD_GLR249	Revenue Variance Report	Query	MD_GLR249_RE
MD_GLR270	Budget to Actuals Comparison	Query	MD_GLR270_BO
MD_GLR323	All Years Revenue	Query	MD_GLR323_AL
MD_SSI105	Award	Query	MD_SSI105_AW
MD_TLYSHEET	Custom Tally Sheet	Query	MD_TALLY_SHE

MD_SSI105_AWARD_SHEET_SRC

Contract ID



MD_SSI105.pdf 1 / 2

MIAMI-DADE COUNTY

**CONTRACT AWARD SHEET
INTERNAL SERVICES DEPARTMENT**

CONTRACT ID: GRP0000026
 PREVIOUS CONTRACT ID:
 TITLE: testing
 CURRENT CONTRACT PERIOD: 2020-03-18 THROUGH 2025-03-17
 OTRs: N
 CONTRACT AWARD VALUE: 0

SECTION #1 – APPLICABLE ORDINANCES

LIVING WAGE: N UAP: IG:

SECTION #2 – CONTRACT MEASURES

LOCAL PREFERENCE: N PERFORMANCE BOND: N SMALL BUSINESS ENTERPRISE (SBE): N
 INSURANCE: N PTP Funds: N

Lesson 3: BI Publisher Reporting

Lesson Summary

Now that you have completed the BI Publisher Reporting lesson, you should be able to:

- Run BI Publisher Reports



Lesson 4: Pivot Grid

Lesson 4: Overview

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

- Run Pivot Grid Reports

Lesson 4: Pivot Grid

Key Terms

The following key terms are used in this module.



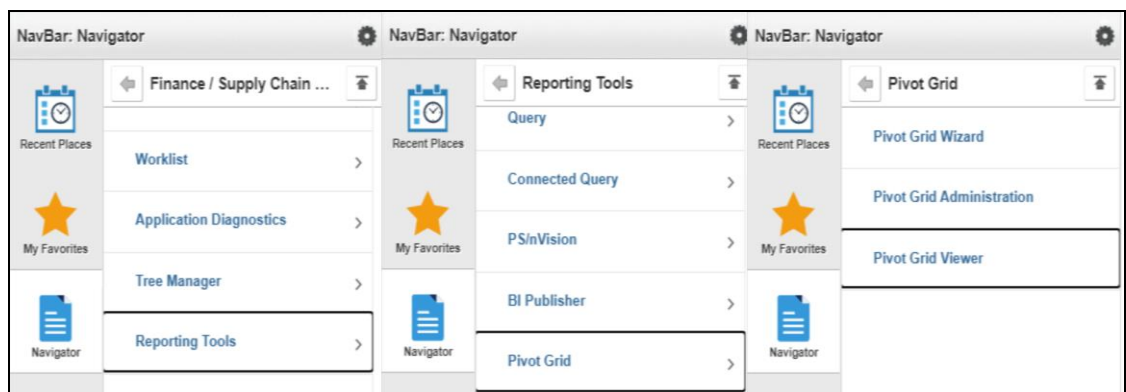
Term	Definition
Data Source	Is the location where the data used by the tool comes from. In the case of Pivot Grids and BI Publishers, it is usually INFORMS Query.
Pivot Grid	INFORMS Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table and chart representation of data using INFORMS Query, Composite Query and component data source. The framework also enables users to see different views of the data, as in a Microsoft Excel pivot table and the same data is also available in a chart view.

Lesson 4: Pivot Grid

Lecture 1: Run Pivot Grid Reports

This lesson will review how to run Pivot Grid Reports.

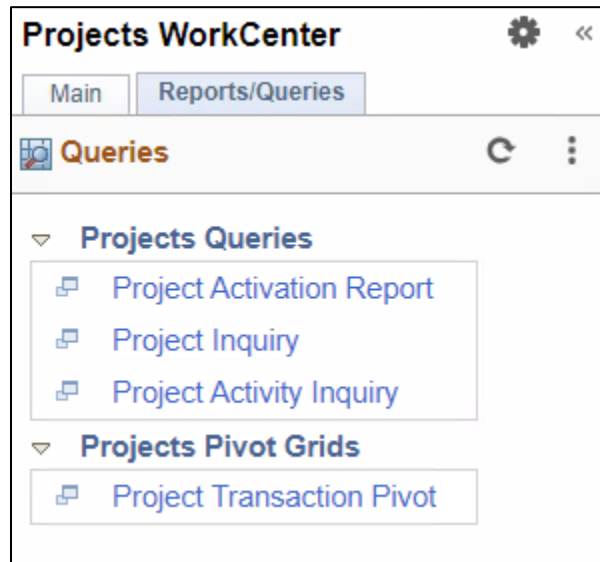
- **Pivot Grid Viewer** is the component that Pagelet Wizard, applications, and so on use to view Pivot Grid models. Pivot Grid Viewer describes the pivot grid attributes (Pivot Grid name, Query runtime prompt values, grid axis information, grid view options, chart type information and display options) and renders the display on the page.
- **Pivot Grids** are primarily used to visually represent the results of a data source (INFORMS Query) outside the default tabular form the query results provide.
- Using Pivot Grid, users can view data in these different visualizations.
 - **Pivot Grid only.** Users are able to view the operational reporting data in a grid, where data pivoting, slicing and dicing is possible.
 - **Chart only.** Users are able to view the operational reporting data in a chart, change the axis, filter the results, drill down to other dimensions and detail. In addition, users can display the grid from a chart-only view and then perform various actions—such as pivoting data, dragging and dropping and slicing and filtering data—to change the grid layout. After the layout is satisfactory, users can synchronize the chart with the grid view.
 - **Pivot Grid and chart.** Users are able to view the operational reporting data in both a grid and a chart. The data between the grid and the chart is synchronized.
- The Pivot Grid can be found on the Reporting tools menu as well. Like Query Viewer and BI Publisher, the Pivot Grid has a report view page called the Pivot Grid Viewer. This can be accessed through **Reporting Tools > Pivot Grid > Pivot Grid Viewer**.



Lesson 4: Pivot Grid

Lecture 1: Run Pivot Grid Reports

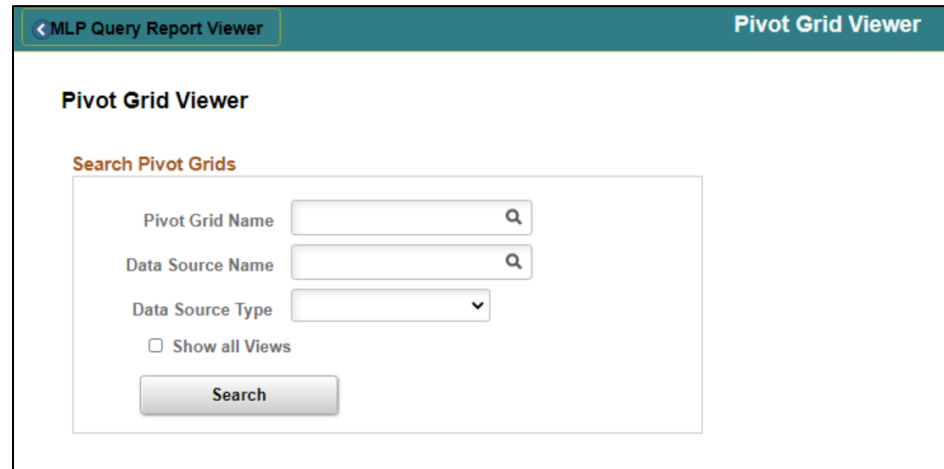
- The Pivot Grid can be found in the users WorkCenter. Below is an example navigation using the Project Costing WorkCenter. **Finance / Supply Chain > Project Management > Projects WorkCenter > Report/Queries > Projects Pivot Grids**



Lesson 4: Pivot Grid

Lecture 1: Run Pivot Grid Reports

- The **Pivot Grid Viewer** search page provides users with the options to search via Pivot Grid Name, Data Source Name, and Data Source Type. The Pivot Grid name comes ready with a prompt to show all available Pivot Grids users are able to access. The Data Source Name acts the same way.



- Once the search parameters are set, users just need to search and the results are then displayed in the grid at the bottom of the page.

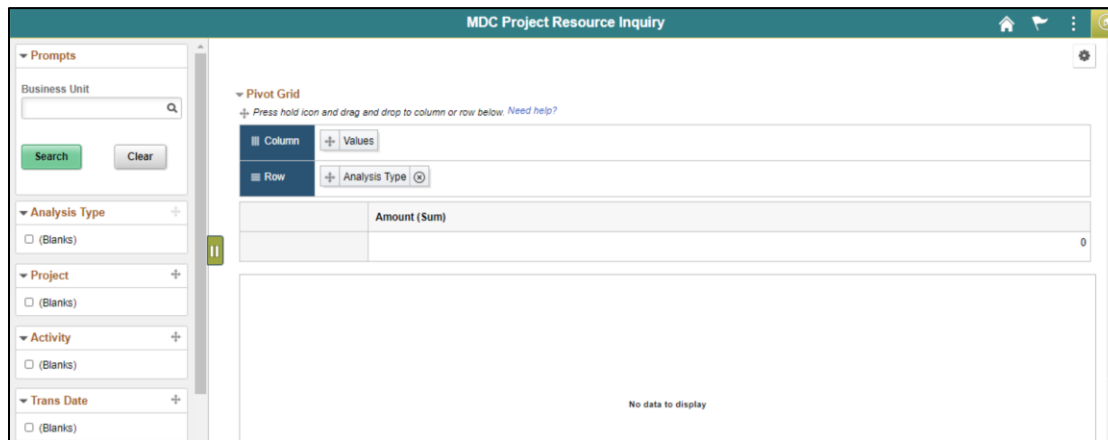


Pivot Grid Name	Pivot Grid Title	Open in Fluid Mode
MDC_PROJRES_PIV_PROTO_1	MDC Project Resource Inquiry	<input checked="" type="checkbox"/>

Lesson 4: Pivot Grid

Lecture 1: Run Pivot Grid Reports

- Select on the link to view the report online. A new window opens displaying the report results according to the runtime inputs. When Query runtime parameters exist, the parameters are displayed on the left side of the window. The right side of the window is reserved for the data results of the grid.

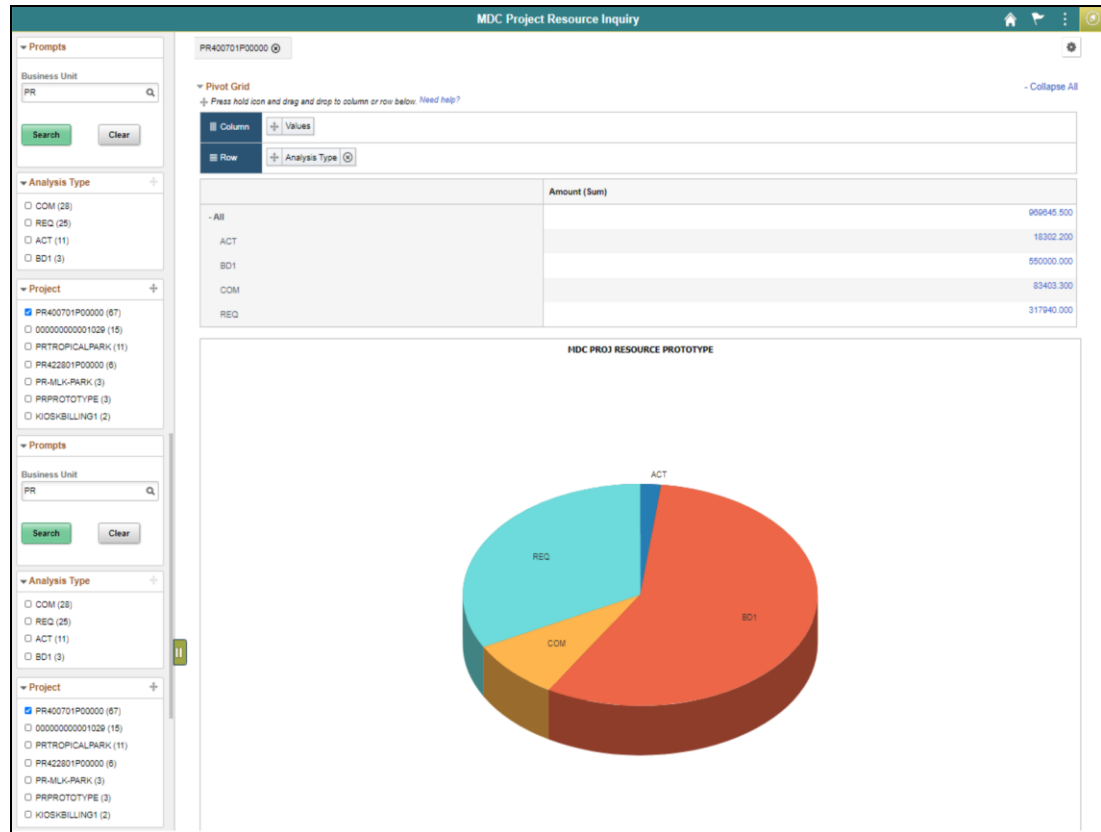


The screenshot displays the 'MDC Project Resource Inquiry' window. On the left, a 'Prompts' sidebar contains several filters: 'Business Unit' (with a search field and 'Search'/'Clear' buttons), 'Analysis Type' (checkbox for '(Blanks)'), 'Project' (checkbox for '(Blanks)'), 'Activity' (checkbox for '(Blanks)'), and 'Trans Date' (checkbox for '(Blanks)'). The main area is titled 'Pivot Grid' and includes a hint: 'Press hold icon and drag and drop to column or row below. Need help?'. Below this, there are two rows for defining the grid: 'Column' with a '+' icon and 'Values', and 'Row' with a '+' icon and 'Analysis Type'. A table structure is visible with a header row 'Amount (Sum)' and a data row showing a value of '0'. The bottom of the grid area displays the message 'No data to display'.

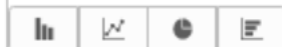
Lesson 4: Pivot Grid

Lecture 1: Run Pivot Grid Reports

- Enter the parameters on the data fields and **Search** to show the results. The top table will be the data summary (the Pivot), and the bottom result should be the graphical representation (the chart). Below is an example with the report as both Pivot and Chart.



- If the chart is available, the users should be able to choose how the data is graphically represented, such as with a Pie, Bar, Line, or Horizontal Bar chart.



Lesson 4: Pivot Grid

Lecture 1: Run Pivot Grid Reports

- Depending on how it was configured, the pivot is collapsible on a summary or can be drilled into the details by searching on the link available.

Pivot Grid - Collapse All

Press hold icon and drag and drop to column or row below. [Need help?](#)

Column	Values
Row	Analysis Type
- All	Amount (Sum) 000045.500
ACT	18302.200
BD1	550000.000
COM	83403.300
REQ	317940.000

- The drill-down shows the tabular representation of the data, which should coincide with the results of the Data Source if run under Query Viewer.

MDC Project Resource Inquiry 67 rows

Unit	Project	Project Description	Activity	Activity Description	Trans Date	Analysis Type	Analysis Type Description	Amount	Journal ID	Account	Dept	Grant	Fund	Invoice	Voucher	Req ID	PO No.
PR	PR400701P00000	TAMIAMI PARK	MATERIALSUPPLIE	Materials & Supplies	10/01/2019	BD1	Budget	100000.000	00000000409	5950100000	PR25030000	NO-GRANT	G4001				
PR	PR400701P00000	TAMIAMI PARK	MATERIALSUPPLIE	Materials & Supplies	10/01/2019	BD1	Budget	400000.000	00000000451	5950100000	PR25030000	NO-GRANT	G4001				
PR	PR400701P00000	TAMIAMI PARK	MATERIALSUPPLIE	Materials & Supplies	10/01/2019	BD1	Budget	50000.000	00000000503	5950100000	PR25030000	NO-GRANT	G4001				

Lesson 4: Pivot Grid

Lesson Summary

Now that you have completed the Pivot Grid lesson, you should be able to:

- Run Pivot Grid Reports



Module 3: Guide Summary

Guide Summary The Guide Summary module covers two topics:



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

Module 3: Summary

Objectives Achieved



You have completed the ERP 102 – INFORMS Navigation, Reporting and Online Help guide. You now 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
- How to add Favorites
- Using WorkCenters
- Entering and Finding Data in INFORMS
- INFORMS Approvals
- Run reports in INFORMS
- Use the Report Manager
- Know the basics of Query Reporting
- Run a pre-defined Query
- Run a BI Publisher Report
- Run a Pivot Grid Report

Module 3: Summary

Additional Training and Job Aids

Other training materials, related to this topic, include:

- ERP 101: Overview of INFORMS

You also have the following resources available to you:

- How to Submit a SmartIT Ticket Job Aid

For additional information, be sure to visit:

- Miamiidade.gov/informs

Module 3: Summary

Key Terms



The following key terms are used in this guide:

Term	Definition
BI Publisher (XML Publisher)	BI Publisher for INFORMS provides an environment for the power business users to manage templates, data sources, reports, translations, content components and to produce reports according to user-defined criteria. BI Publisher for INFORMS also can burst reports, such as annual wage statements for employees, electronically.
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.
INFORMS Inquiry	INFORMS pages within each module allows users to look up existing information.
INFORMS Query	Run pre-defined specific queries to extract precise information.
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 3: Summary

Key Terms



The following key terms are used in this guide:

Term	Definition
Pivot Grid	INFORMS Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table and chart representation of data using INFORMS Query, Composite Query, and component data source. The framework also enables users to see different views of the data, as in a Microsoft Excel pivot table, and the same data is also available in a chart view.
Process Scheduler	The primary role of Process Scheduler is to support the INFORMS application environment. With the INFORMS application, users might want to perform certain processes (such as running programs, batch programs, reports, and so on) in the background of the online system.
Report Manager	Report Manager provides a single place where users can view previously run reports.
Run Control ID	A run control is a database record that provides values for report settings. Instead of entering the same values each time the users runs a report, users create and save a run control with those settings. The next time users run the report, users select the run control, and INFORMS fills in the settings.
Search/Match	A feature that enables users to search for and identify duplicate records in the database.
Single Sign-on (SSO)	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.

Module 3: Summary

Key Terms



The following key terms are used in this guide:

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.
WorkCenter	A Dashboard for users to manage their workload. It is a one-stop-shop for users performing different business transactions to take action on alerts and view reports and analytics. The built-in intelligence delivers work to the users instead of users searching for information. It makes multitasking easy and seamless.
XML	Extensible Markup Language (XML). This is used to define data to dictate how users are represented online.