Miami-Dade County

INFORMS

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

Table of Contents

Content	Page

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:

Roles and Responsibilities

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

- 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.
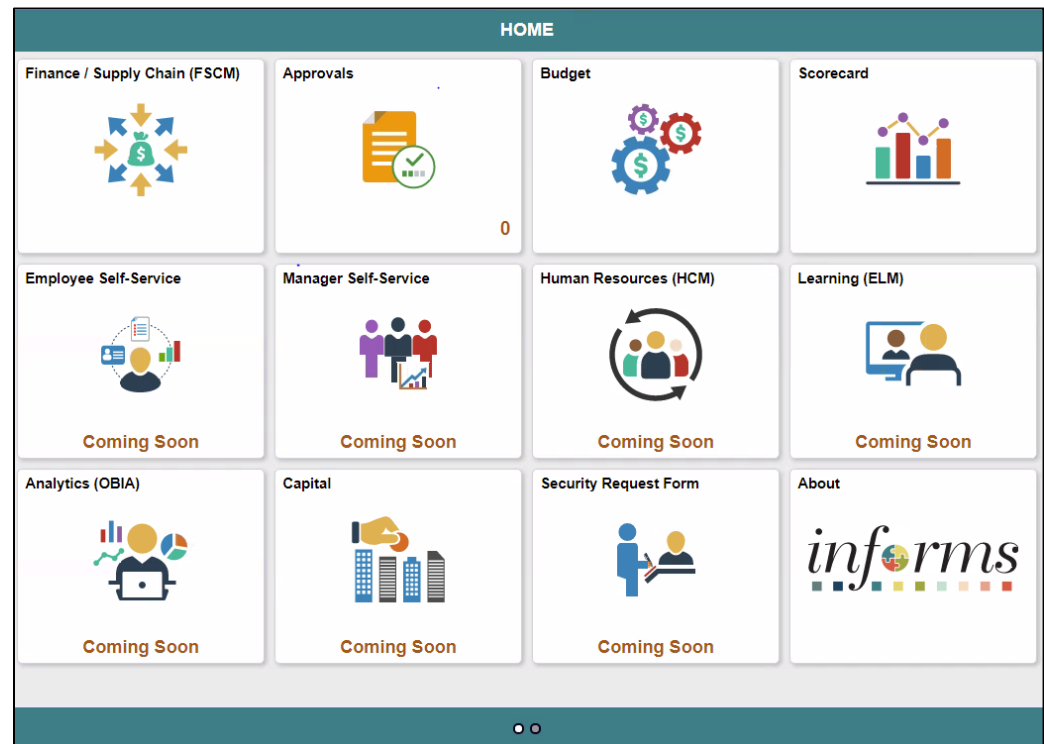
Lesson 1: Logging in to and Navigating INFORMS

Lecture 2: 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.

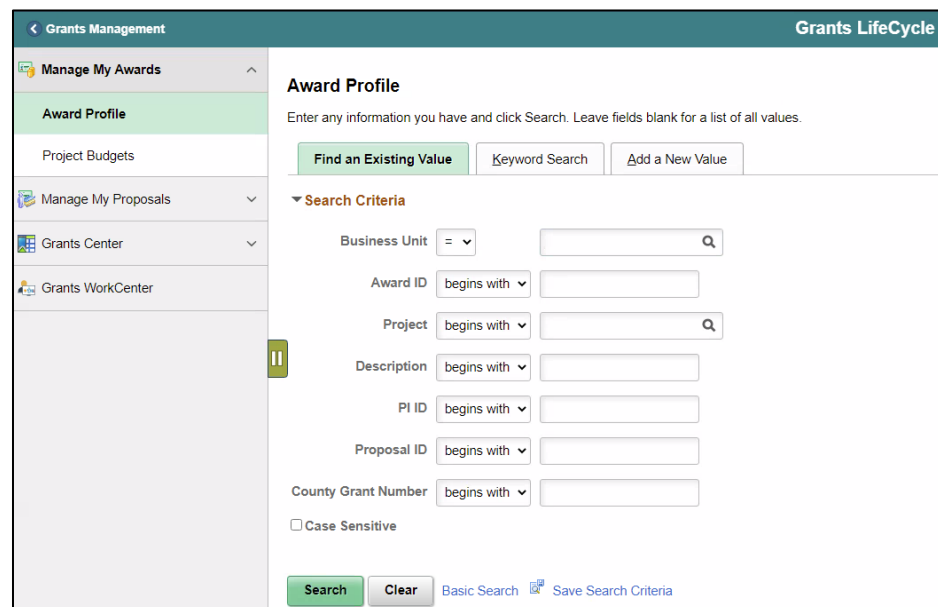| Icon	Description
HOME	Homepage drop-down selection. When there are multiple homepages to which users have access, users switch to other fluid homepages using this drop-down list.
(home icon)	Home / Home button. Use to return to the default homepage, which is the fluid homepage, users arrive at immediately upon sign on.
(search icon)	Search / Search button. Use to perform Global Search.
(notify icon)	Notify / Notifications button. Displays the notification window showing any pending actions or alerts.
(action icon)	Action / Action menu button. Use to display the actions menu.
(menu icon)	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 icon)	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.
(tiles image)	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.

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.
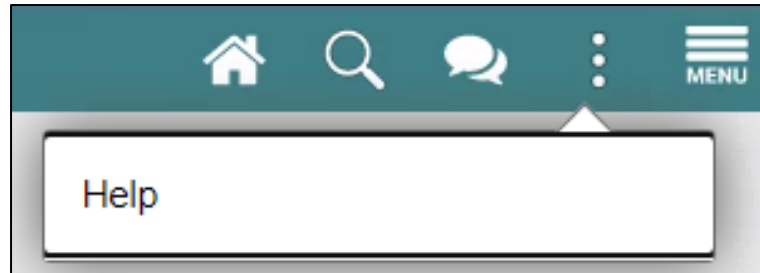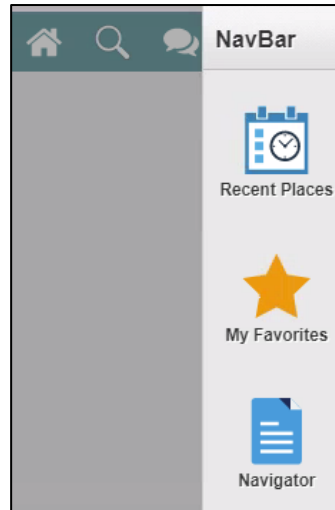
Lesson 1: Logging in to and Navigating INFORMS

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.

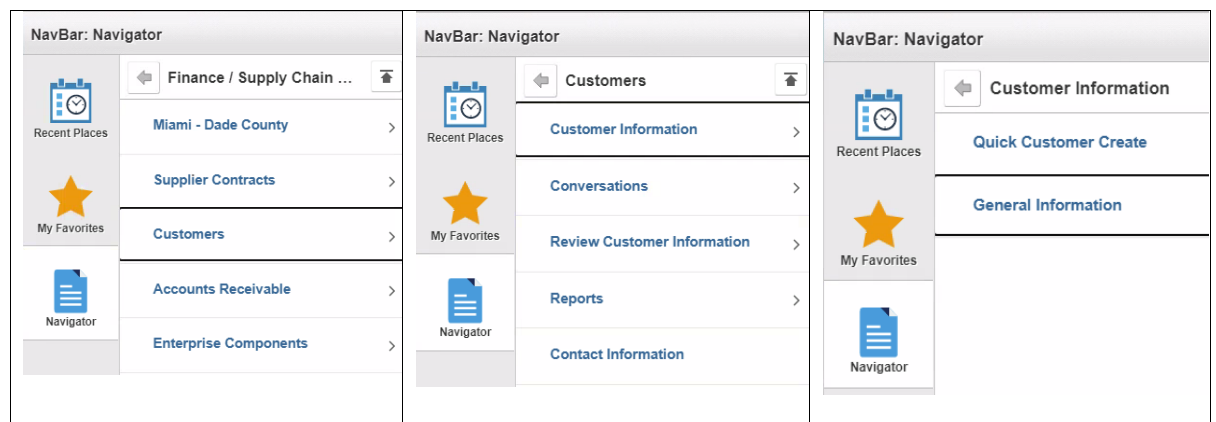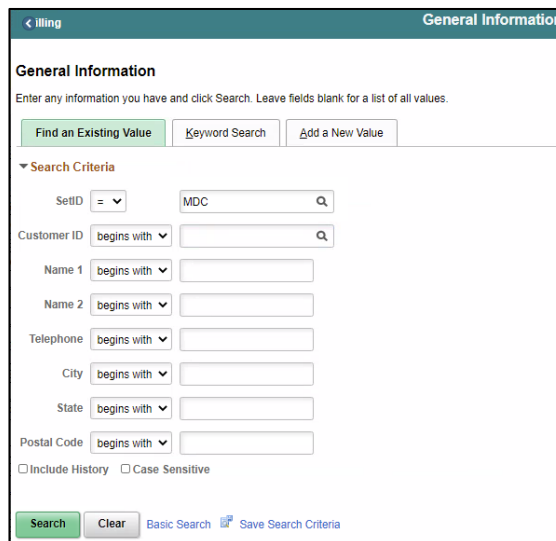| Icon	Description
Recent Places	**Recent Places**. Displays links to the pages recently visited by the current users.
My Favorites	**My Favorites**. Displays any specified favorite pages. Favorites can be added through the **Add to Favorites** link.
Navigator	**Navigator.** Displays the traditional 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)
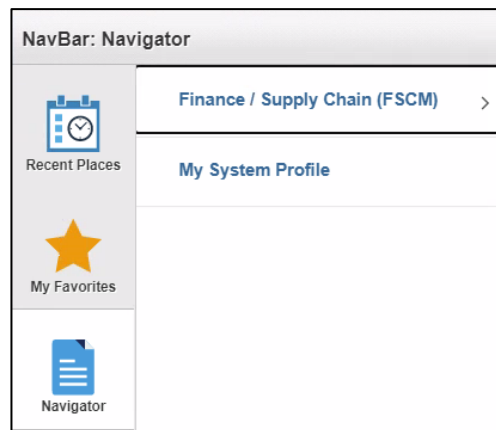
- These navigations direct users to the same components as the Tiles on the Home page. For example, **Customer > Customer Information > General Information** will direct users to the Customer Master Tile. Again, only if users have the appropriate security access.
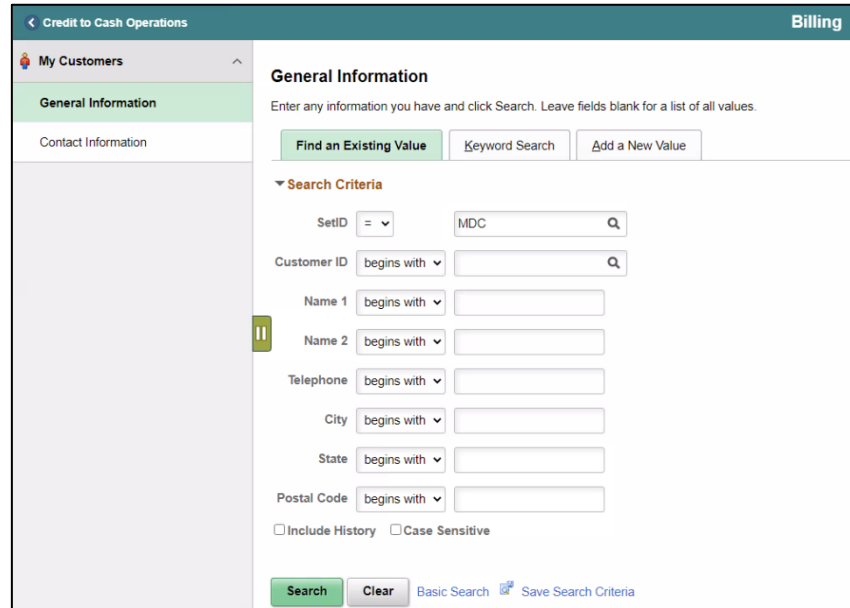
Lesson 1: Logging in to and Navigating INFORMS

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.
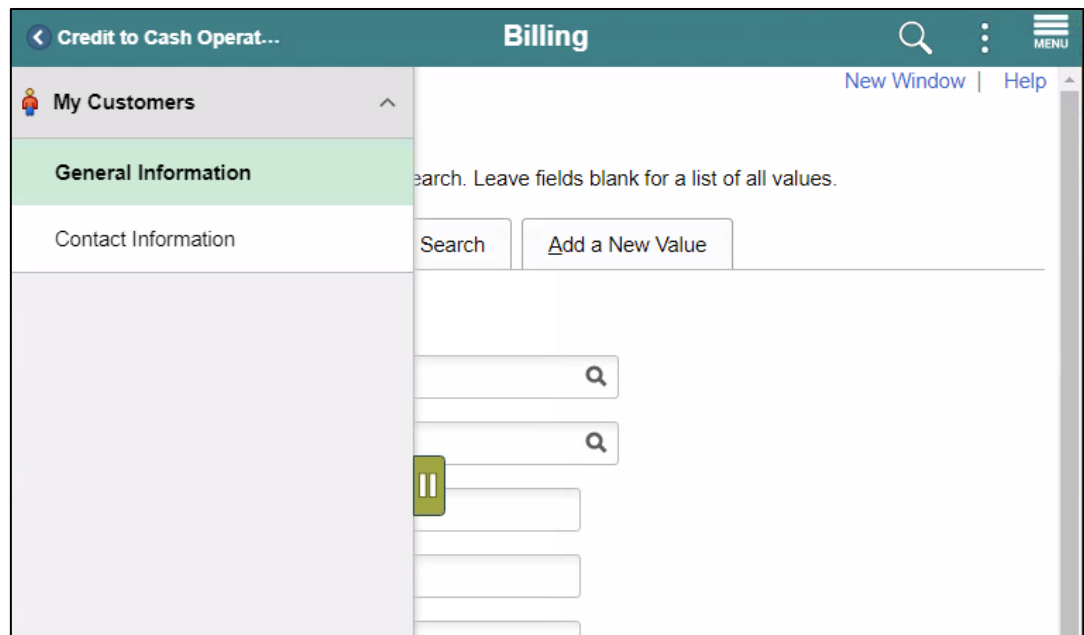
Lesson 1: Logging in to and Navigating INFORMS

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:

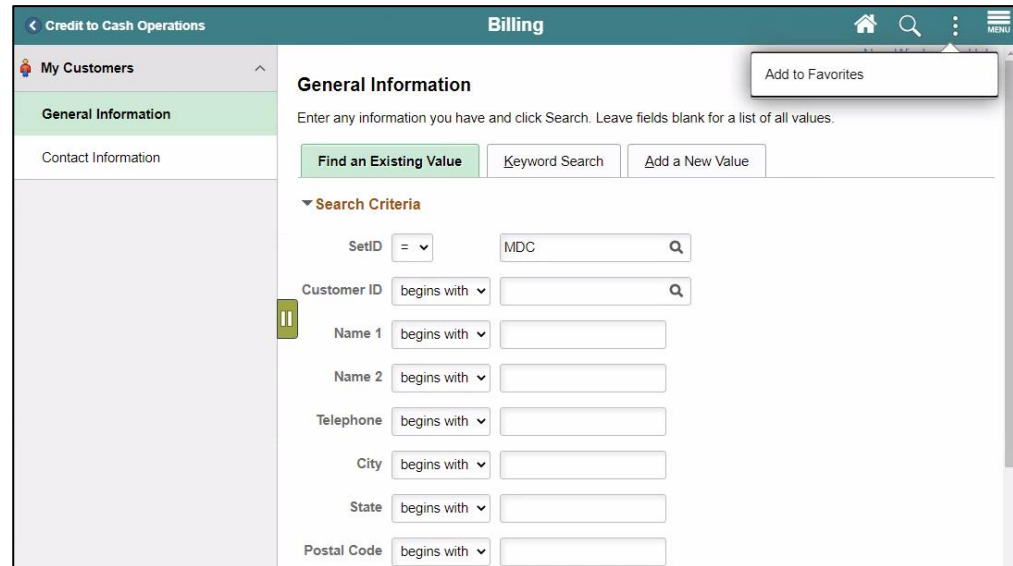| Term	Definition
WorkCenter	A Dashboard for users to manage their workload. It is a one-stop-shop for users performing different business transactions to take action on alerts and view reports and analytics. The built-in intelligence delivers work to users instead of users searching for information.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

Lesson 2: Setting Up INFORMS for Your Work

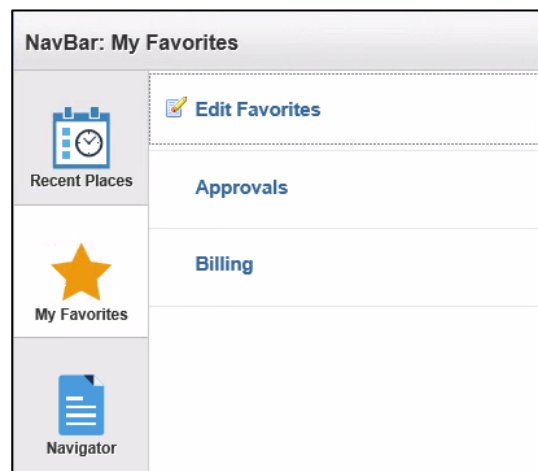Lecture 1: How to add Favorites

This lesson will review how to add Favorites.

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

  - o Users will then be able to edit the sequence or delete the items on their favorites under the NavBar.
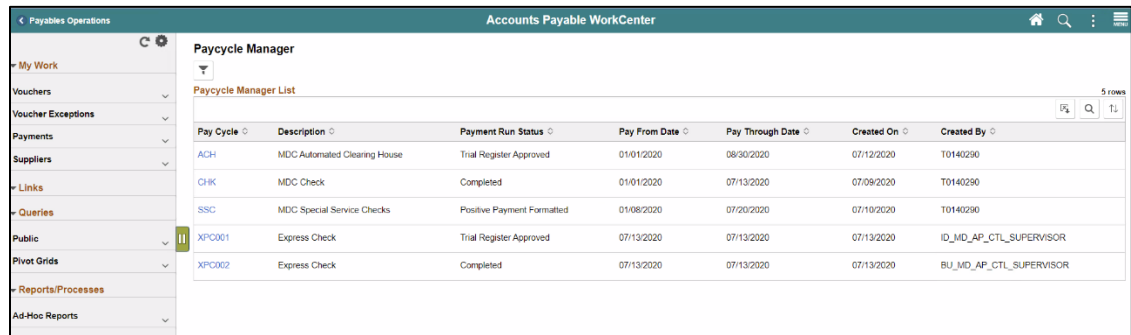
Lesson 2: Setting Up INFORMS for Your Work

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.

- 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

o 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

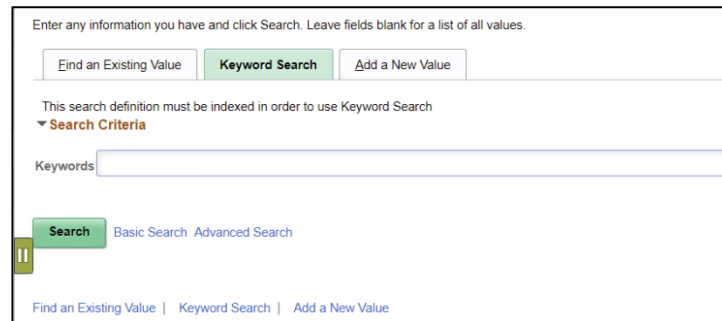**Key Terms**

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

o **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	= ∨	MDC 🔍
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.
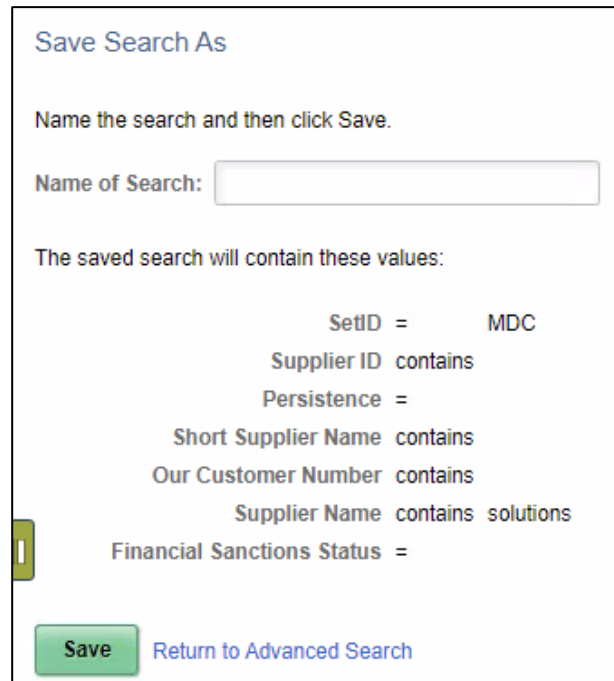

- **Using Operators.** when performing an advanced search, users can use a variety of operators to narrow searches. For example, users can search for customers by first letter, by values that are less than or greater than a specified amount, etc. Operator examples include.

Operator	Field Use
begins with	Character fields.
contains	Character fields.
=	All field types.
not=	All field types.
<	All field types.
<=	All field types.
>	All field types.
>=	All field types.
between	All field types.
in	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:
How to
Find Data**

An example of Include History and Correct History is below.

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:
How to
Enter Data

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

- 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.

> *Item Description

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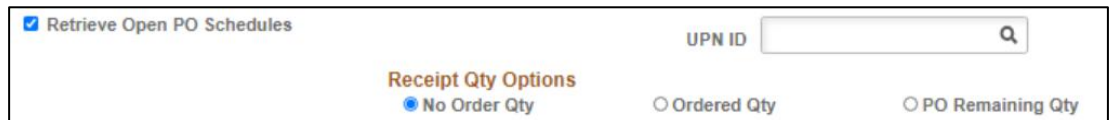
> Additional Information

  - **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.

> English ▼
> English
> French
> German
> Greek
> Italian
> Japanese
> Korean
> Portuguese
> SChinese
> Spanish
> Swedish ▼

Lesson 3: Entering and Finding Data in INFORMS

Lecture 2:
How to
Enter Data

- o **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.

- o **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.

- o **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.

- 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

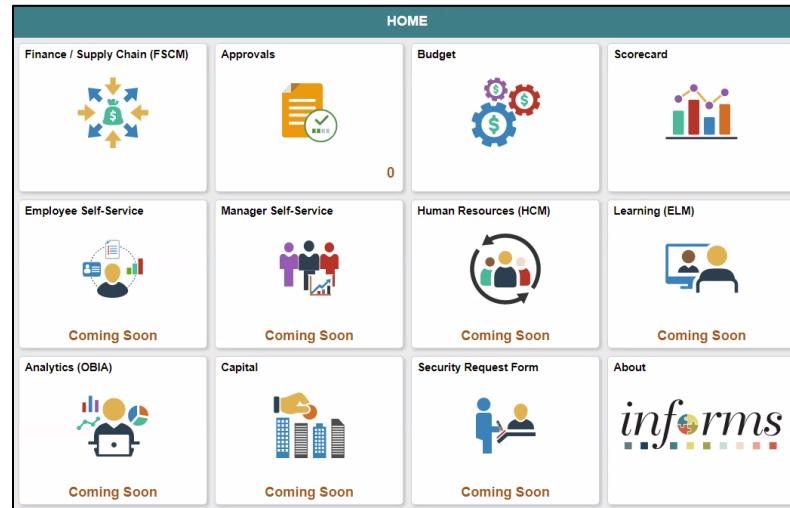At the conclusion of this lesson, users will be able to.

- 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 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.

- 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.

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

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

o **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
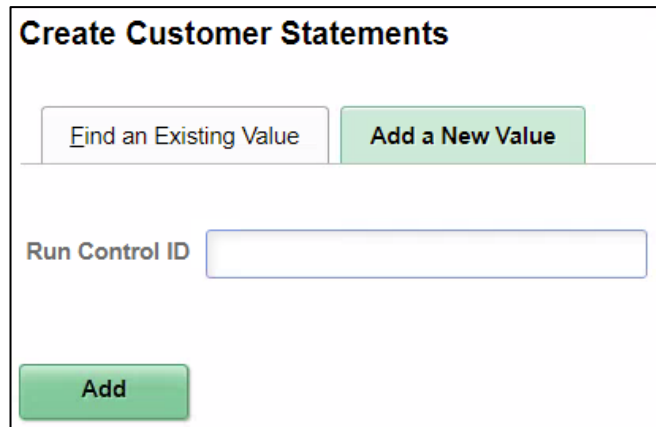
The following key terms are used in this Lesson.

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.
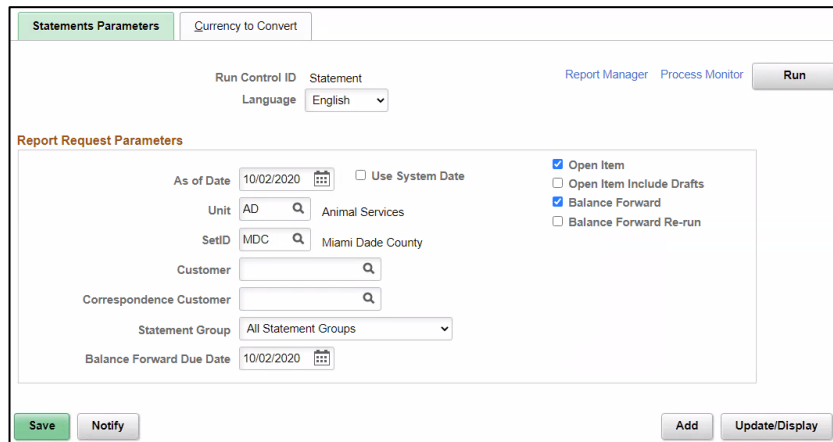
Create Customer Statements

| Find an Existing Value | Add a New Value |

Run Control ID [   ]

Add

Statements Parameters | Currency to Convert

Run Control ID   Statement
Language   English

Report Manager   Process Monitor   Run

Report Request Parameters

As of Date   10/02/2020   ☐ Use System Date
Unit   AD   Animal Services
SetID   MDC   Miami Dade County
Customer
Correspondence Customer
Statement Group   All Statement Groups
Balance Forward Due Date   10/02/2020

☑ Open Item
☐ Open Item Include Drafts
☑ Balance Forward
☐ Balance Forward Re-run

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.
  - o 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 [Query Name ▾]   begins with [_____]

[Search]   Advanced Search
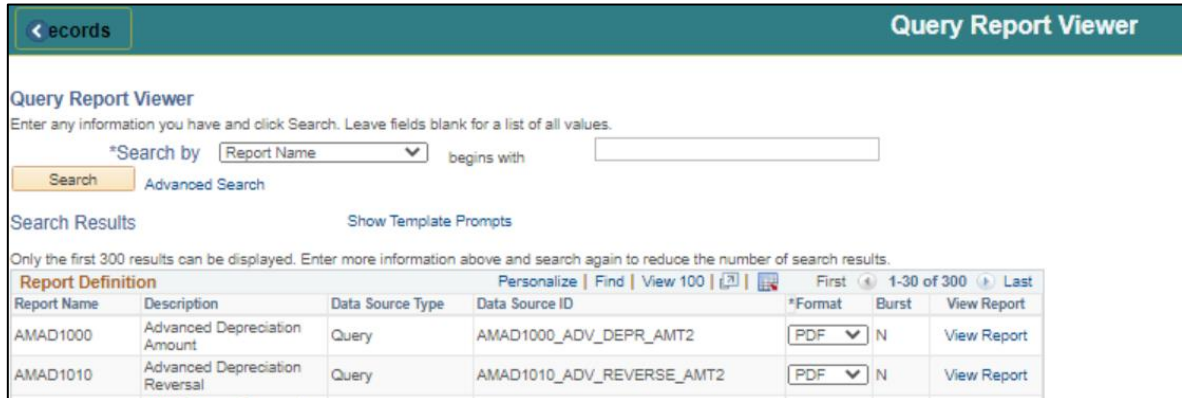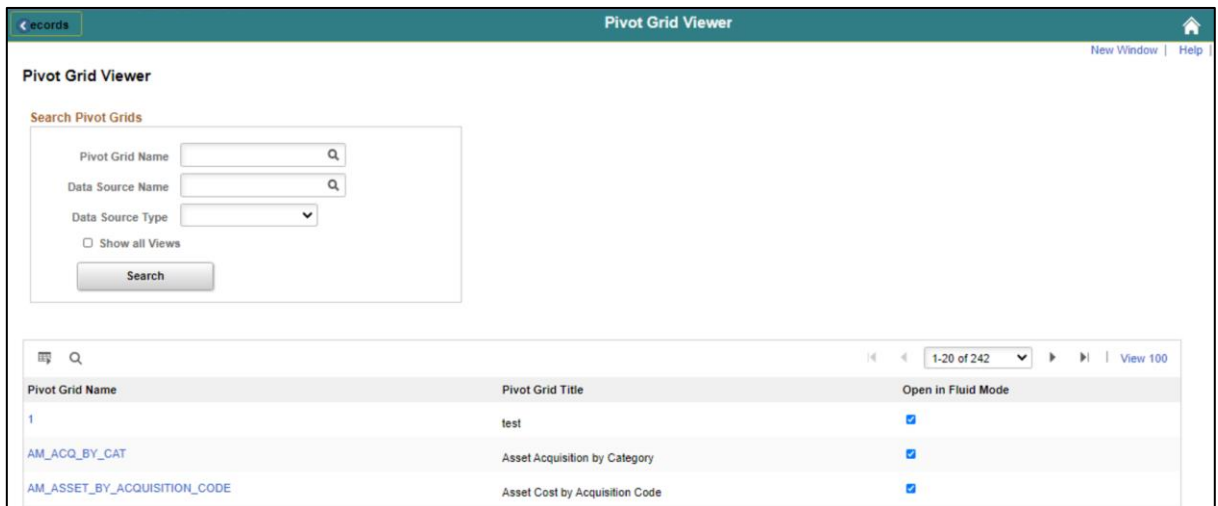
Search Results

*Folder View [-- All Folders -- ▾]

Query

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

1-30 of 159 | View 100

Lesson 1: How to Run Reports in INFORMS

- o **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.

- o **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.
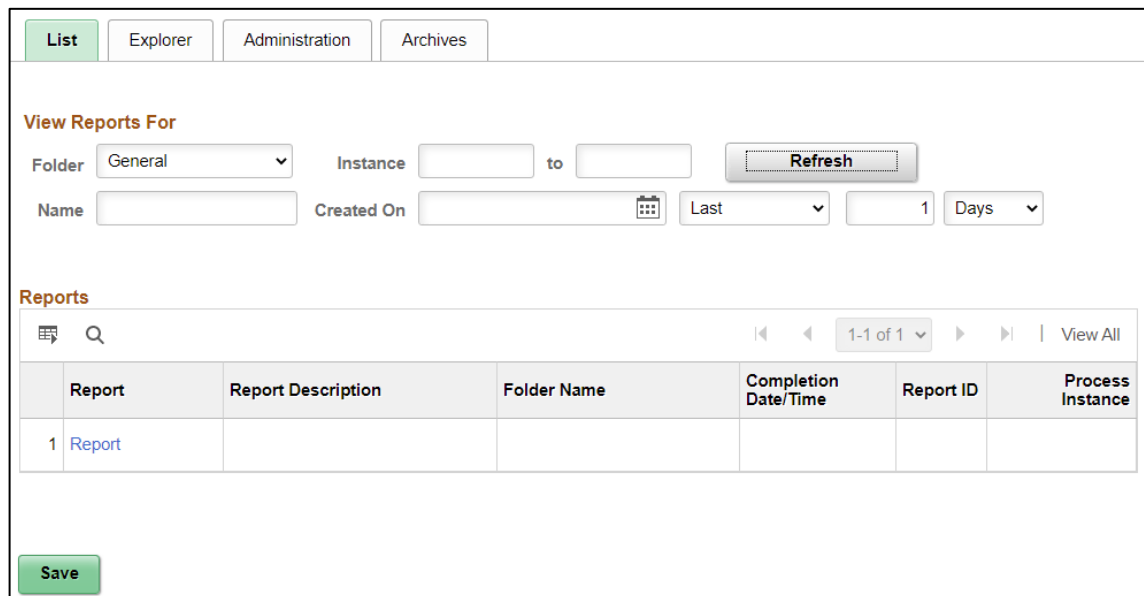

- • Similarly, as stated in Module 2, the reports that users will need for operations will be published in the WorkCenters of each module.

Lesson 1: How to Run Reports in INFORMS

Lecture 2: How to use the Report Manager

This lesson will review using 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.
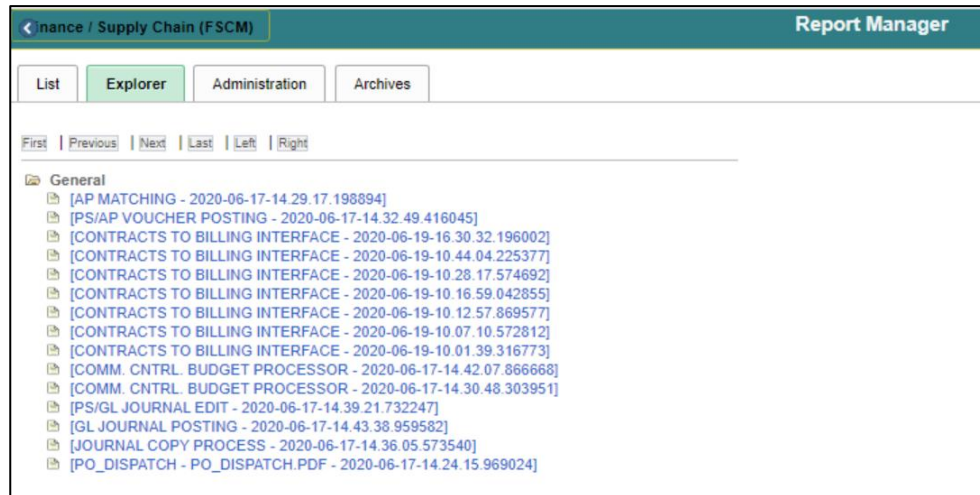

- Reporting folders are used to assist in organizing reports and reducing the size of the report lists.
- The users can view a list of reports to which users have access, or select a hierarchical view of folders and reports.

45

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.
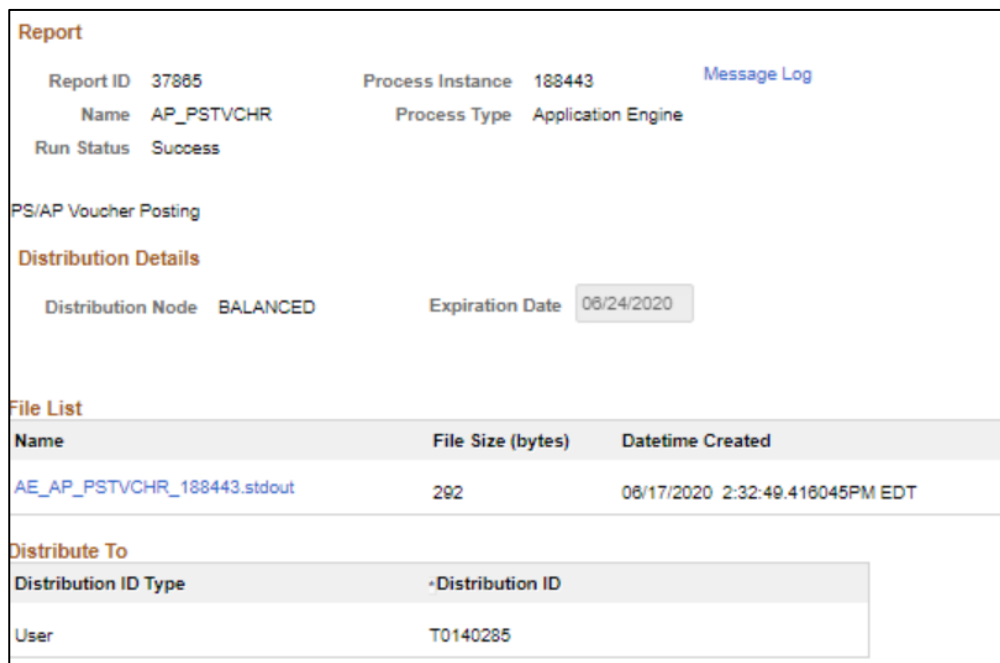
Lesson 1: How to Run Reports in INFORMS

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

o **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

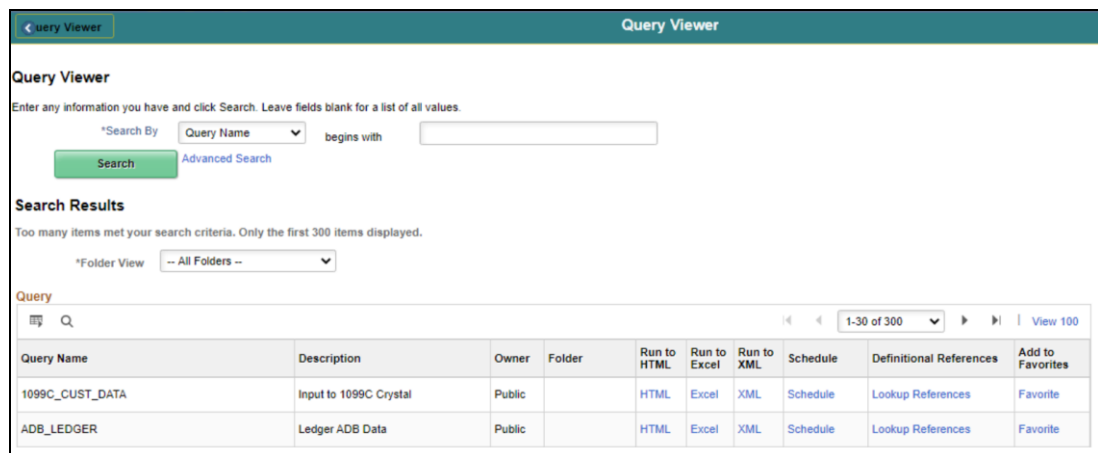Key Terms   The following key terms are used in this Lesson.

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.

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.


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

Lesson 2: How to Run Queries in INFORMS

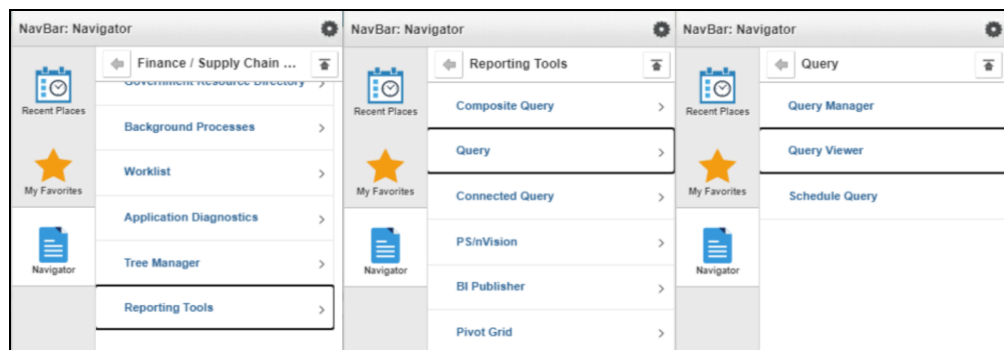Lecture 2: How to run a pre-defined Query

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

- 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**.
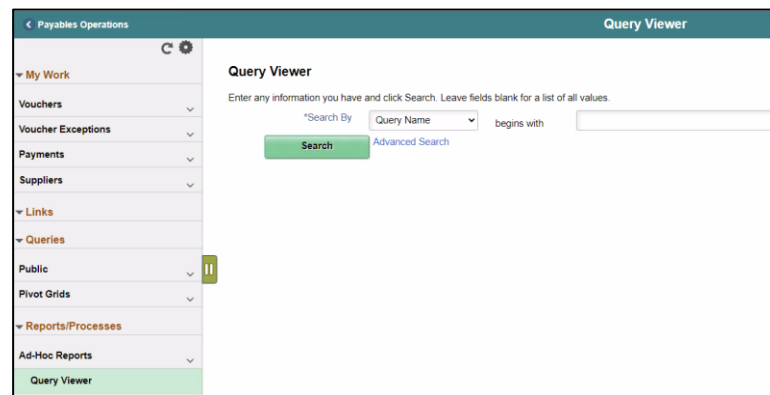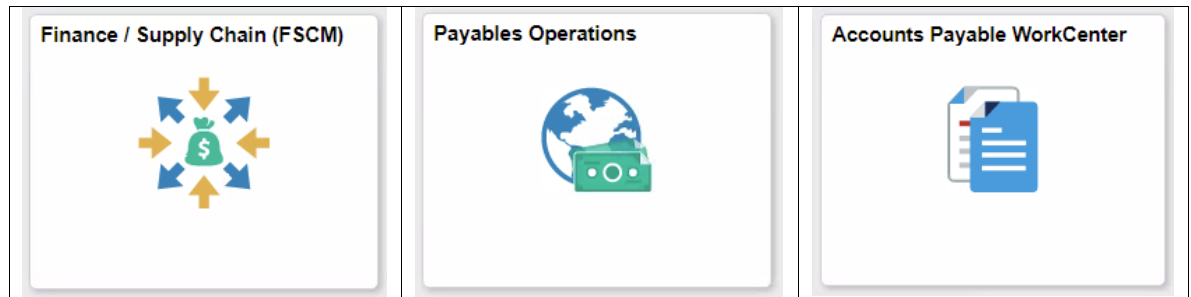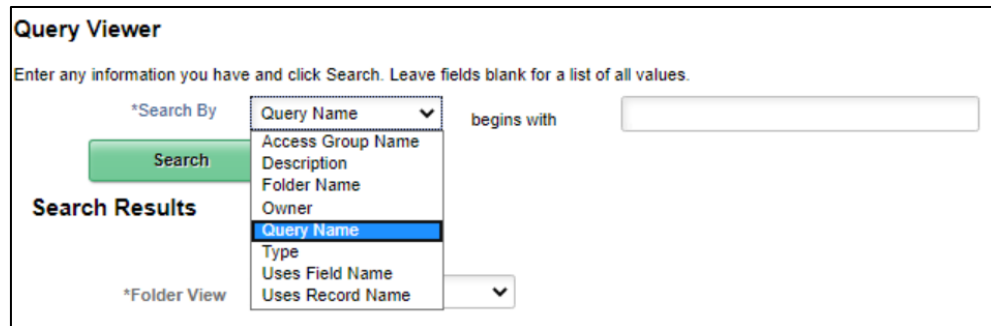

- The **Query Viewer Search Results** page can be found by using the NavBar: **Finance / Supply Chain (FSCM) > Reporting Tools > Query > Query Viewer**.

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.

- 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

- 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.

- 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

o **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:

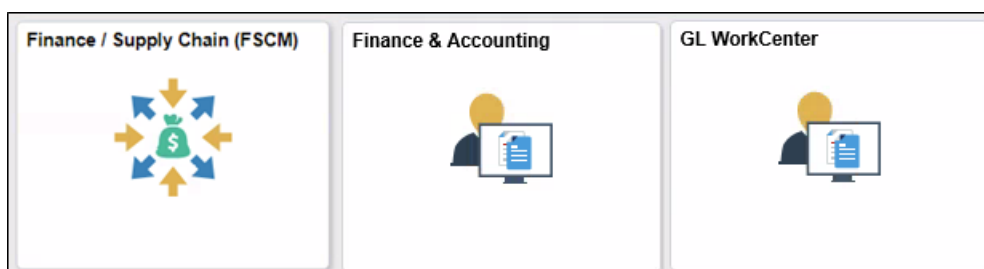| Term	Definition
BI Publisher (XML Publisher)	BI Publisher for INFORMS provides an environment for the power business users to manage templates, data sources, reports, translations, content components and to produce reports according to user-defined criteria. BI Publisher for INFORMS also can burst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

Lesson 3: BI Publisher Reporting

Lecture 1: Run BI Publisher Reports

This lesson will review how to 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.**
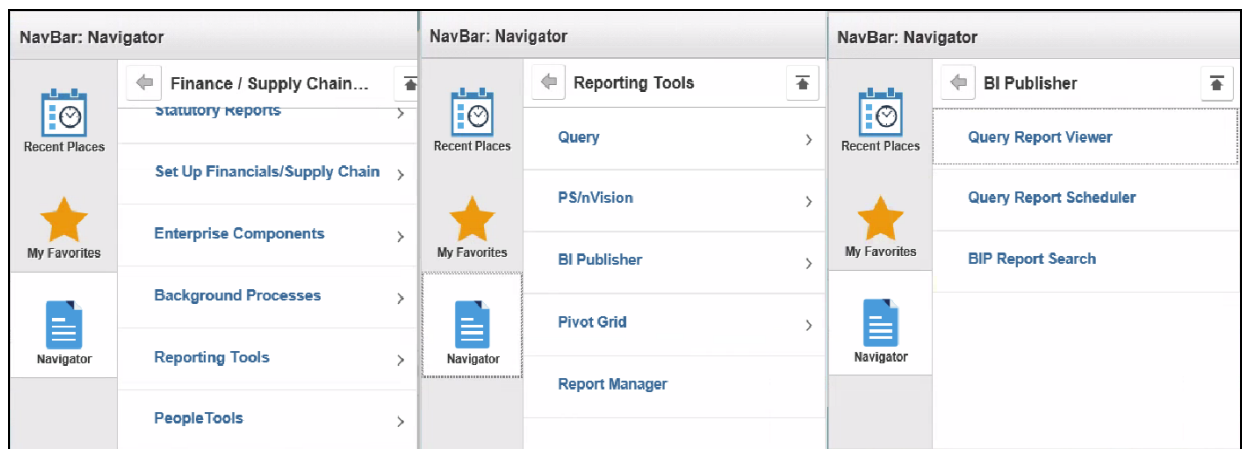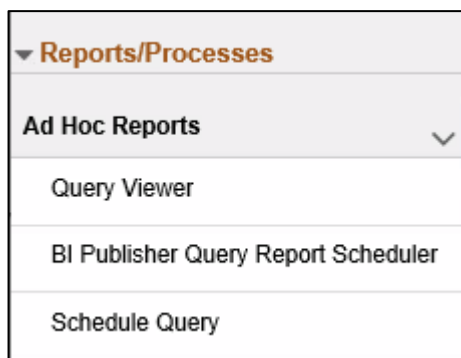

- The Query Viewer can be found in the users WorkCenter. Below is an example navigation using the Project Costing WorkCenter**. Finance / Supply Chain > Finance & Accounting > GL WorkCenter > Report/Processes > Ad Hoc Reports > Query Viewer**

Lesson 3: BI Publisher Reporting

Lecture 1:
Run BI
Publisher
Reports

- 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.
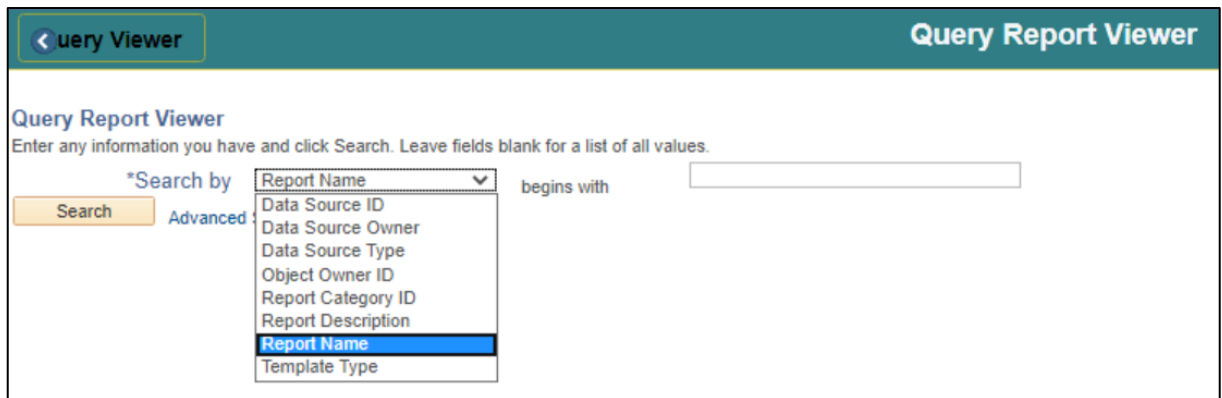
Lesson 3: BI Publisher Reporting

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.

- 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.

Lesson 3: BI Publisher Reporting

Lecture 1:
Run BI
Publisher
Reports

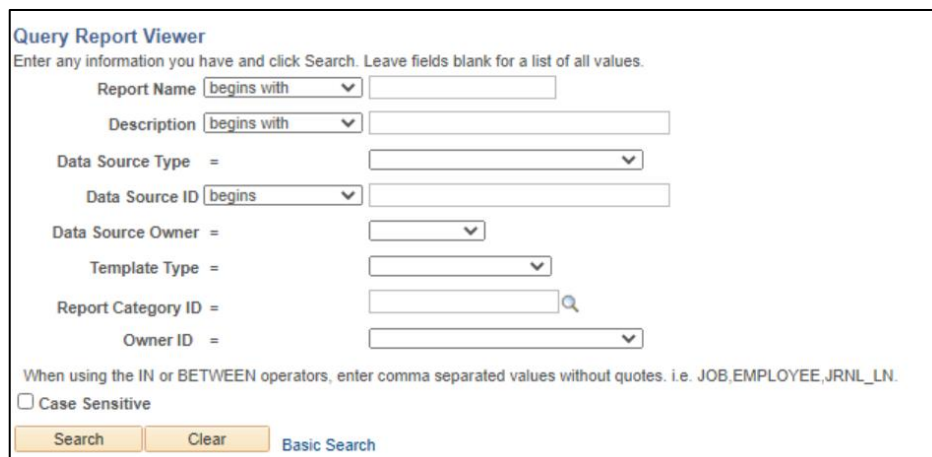- Once the search parameters are set, users just need to search and the results are then displayed in the grid at the bottom of the page.

Query 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
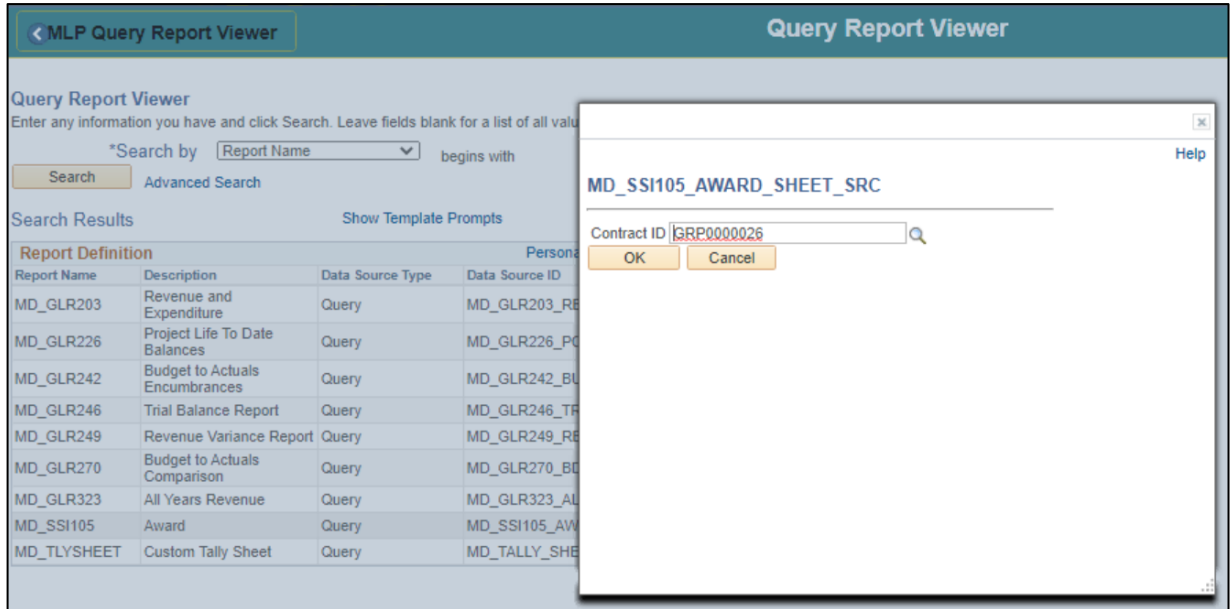
Search Results   Show Template Prompts

Report Definition   Personalize | Find | View All | 🔁 | 🖩   First ◀ 1-9 of 9 ▶ Last
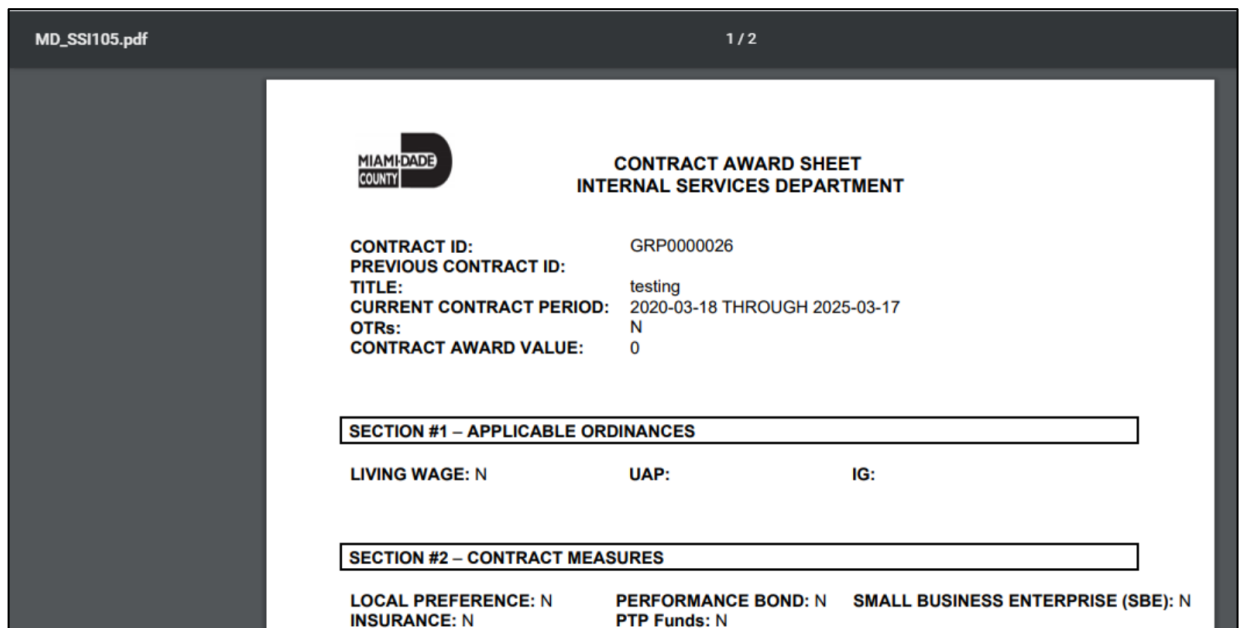
Report Name	Description	Data Source Type	Data Source ID	*Format	Burst	View Report
MD_GLR203	Revenue and Expenditure	Query	MD_GLR203_REVENUE_EXPENDITURE	PDF ▾	N	View Report
MD_GLR226	Project Life To Date Balances	Query	MD_GLR226_PC_LIFE_TO_DATE_QRY	XLS ▾	N	View Report
MD_GLR242	Budget to Actuals Encumbrances	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.

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**.
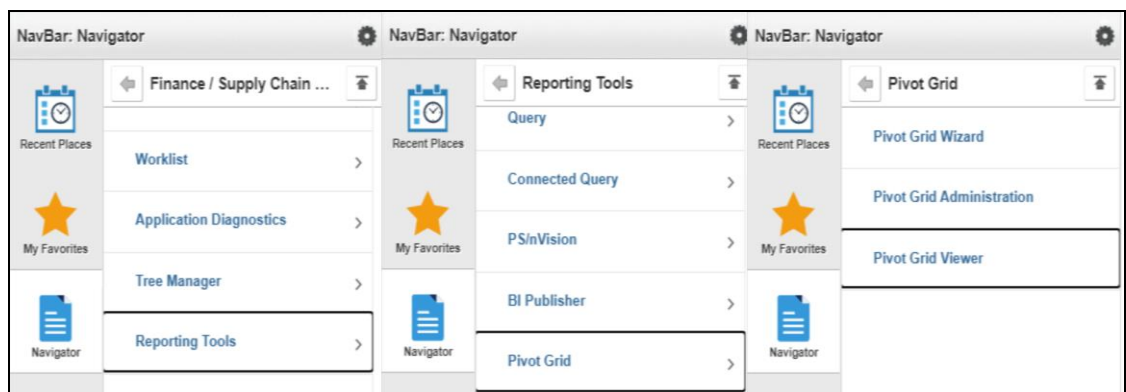
Lesson 4: Pivot Grid

Lecture 1:
Run Pivot
Grid Reports
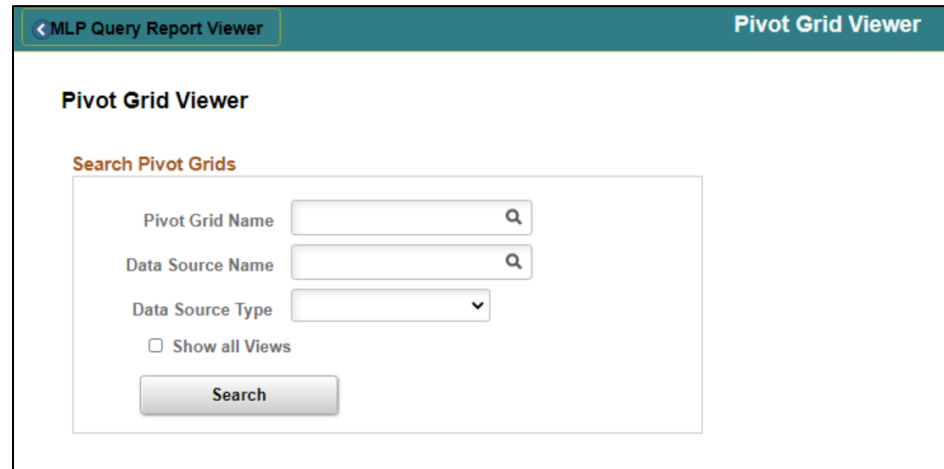
- The Pivot Grid can be found in the users WorkCenter. Below is an example navigation using the Project Costing WorkCenter. **Finance / Supply Chain > Project Management > Projects WorkCenter > Report/Queries > Projects Pivot Grids**
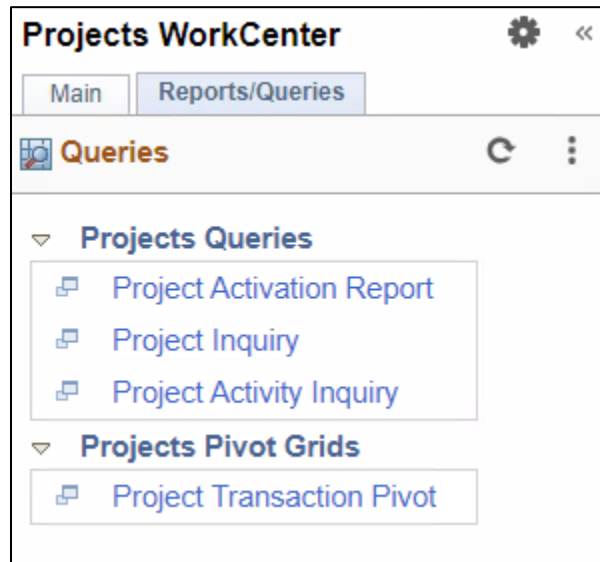
Lesson 4: Pivot Grid

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.
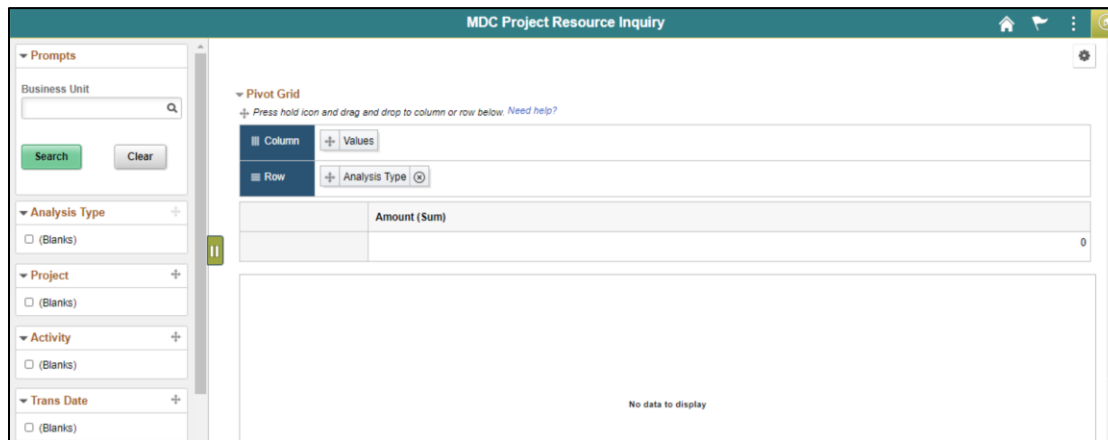
Lesson 4: Pivot Grid

**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.

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.
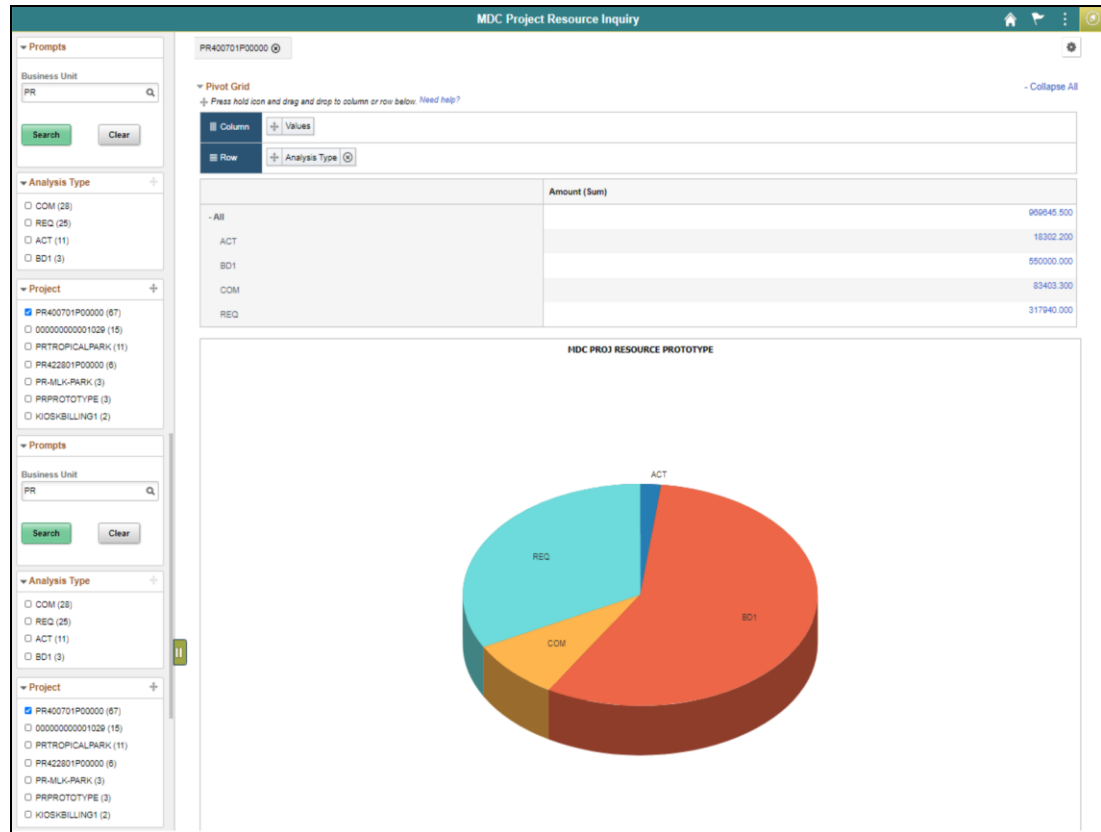
- If the chart is available, the users should be able to choose how the data is graphically represented, such as with a Pie, Bar, Line, or Horizontal Bar chart.
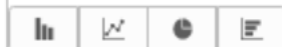
Lesson 4: Pivot Grid

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.

- 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.

71

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:

- Miamidade.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.