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## **End-User Training Guide**

**Course Code: ERP 102**

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

## Course Overview

### Course Description

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

This course consists of the following modules.

- Module 1: Course Introduction
- Module 2: INFORMS Navigation
- Module 3: INFORMS Reporting
- Module 4: INFORMS User Productivity Kit (UPK)
- Module 5: Course Summary

### Training Audiences

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

- All INFORMS End-Users

### Prerequisites

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

- None

### Delivery Method

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

### Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 2 hours.

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## Module 1: Course Introduction

### Topics

This module covers the following topics.

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

## Module 1: Course Introduction

### Course Administration and Logistics

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

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

## Module 1: Course Introduction

### Learning Objectives

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

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

## Module 1: Course Introduction

### Training Audience

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

- All INFORMS end-users

## Module 1: Course Introduction

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



## Module 2: INFORMS Navigation

### Lessons

This module includes the following lessons.

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

## Lesson 1: Logging in to and Navigating INFORMS

### Lesson 1: Overview

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

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

## Lesson 1: Logging in to and Navigating INFORMS

### Key Terms

The following key terms are used in this Lesson.



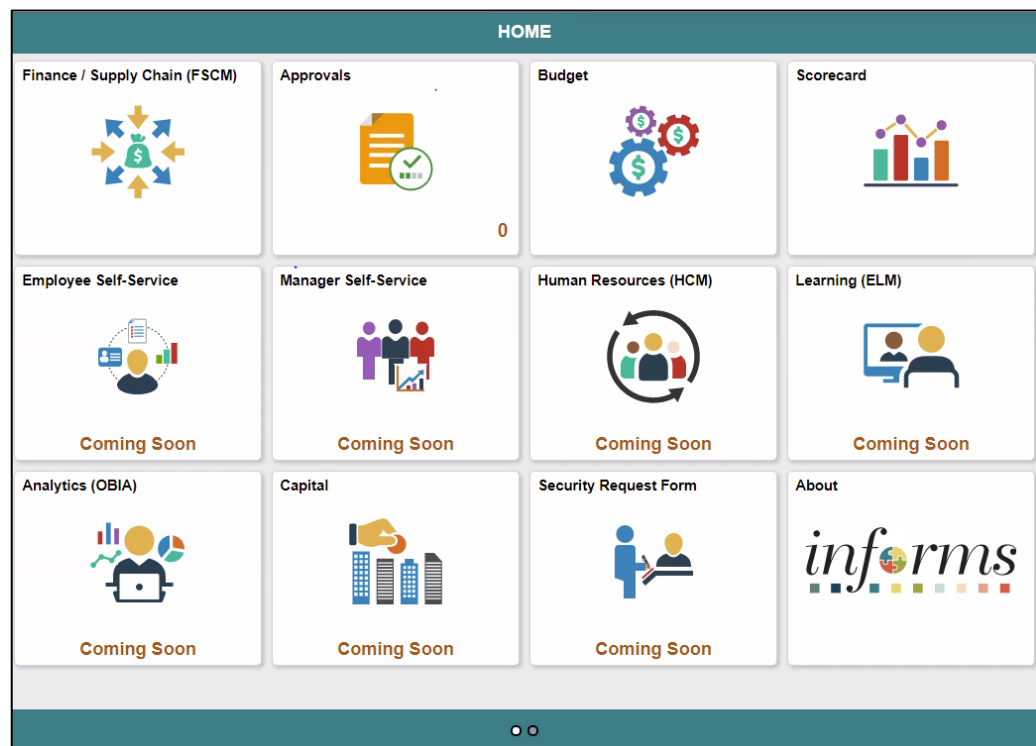
Term	Definition
<b>Dashboard</b>	The home page for the INFORMS application that displays the main menu for easy navigation. The Dashboard lays out links, which users can personalize their content and includes a favorites bar for frequently visited content. There are also header links for quick customization. The Dashboard can only be accessed after logging into the INFORMS application.
<b>Favorites</b>	A user's personal list of navigation shortcuts.
<b>Main Menu</b>	A navigation menu that displays all folders, sub-folders, and links relevant for the user's role.
<b>Search/Match</b>	A feature that enables users to search for and identify duplicate records in the database.
<b>Single Sign-on</b>	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:** This lesson will review logging in to INFORMS.

### Logging in to INFORMS

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












## Lesson 1: Logging in to and Navigating INFORMS

**Lecture 2:** 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

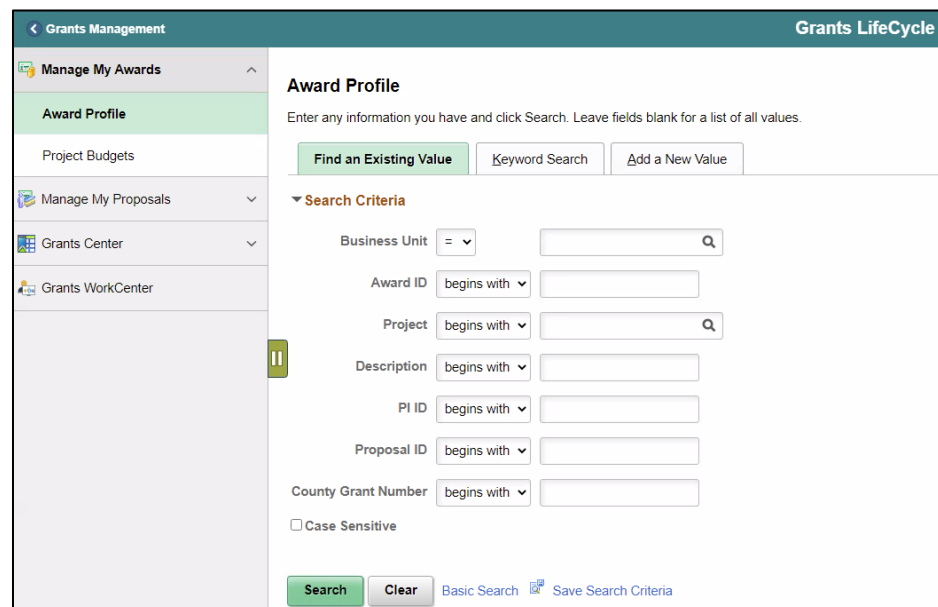
**Lecture 3:** This lesson will review the key elements of Tiles.

### 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.

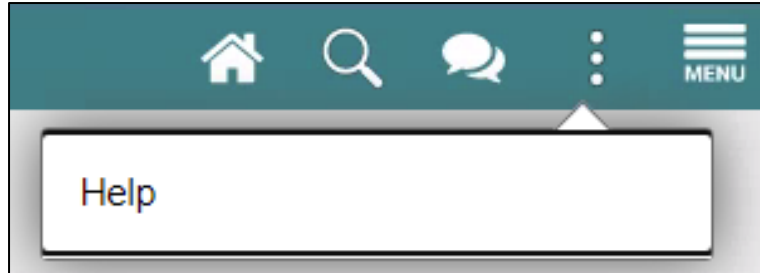


## Lesson 1: Logging in to and Navigating INFORMS

### 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.

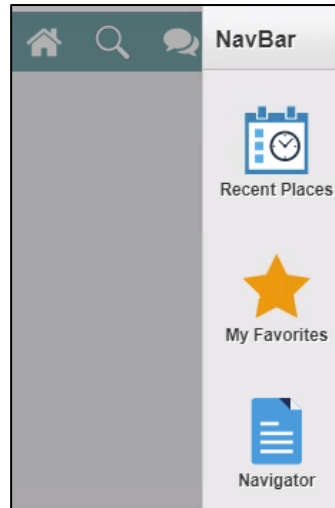





## Lesson 1: Logging in to and Navigating INFORMS

### 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.



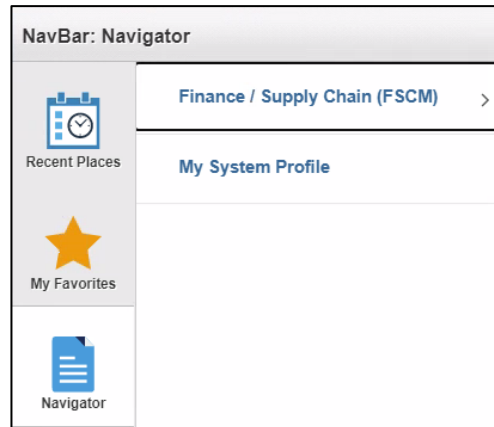
Icon	Description
 Recent Places	<b>Recent Places.</b> Displays links to the pages recently visited by the current users.
 My Favorites	<b>My Favorites.</b> Displays any specified favorite pages. Favorites can be added through the <b>Add to Favorites</b> link.
 Navigator	<b>Navigator.</b> Displays the 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.

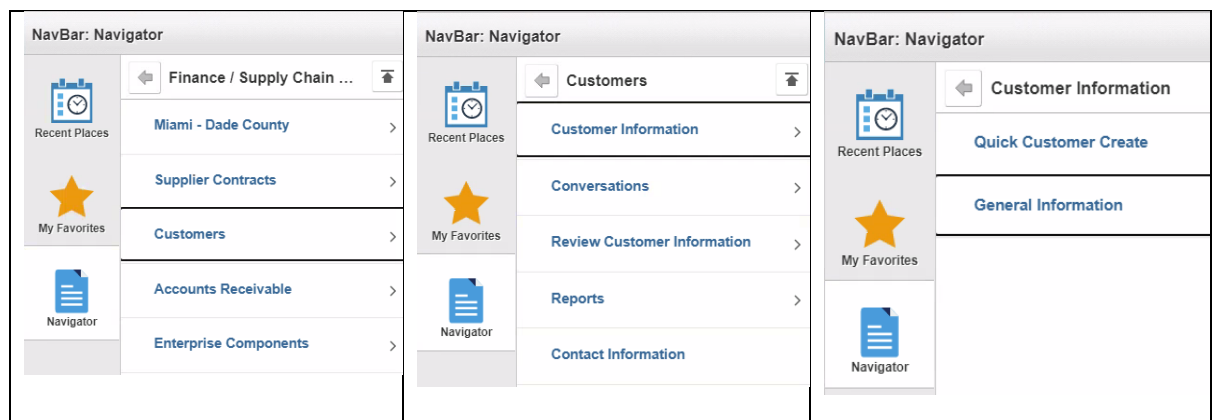
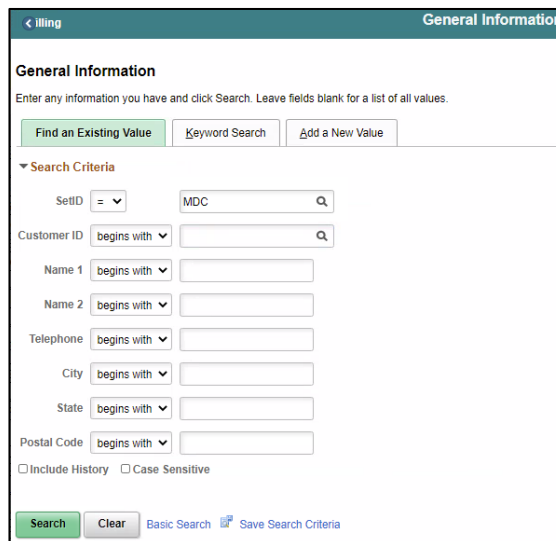


## Lesson 1: Logging in to and Navigating INFORMS

### 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.

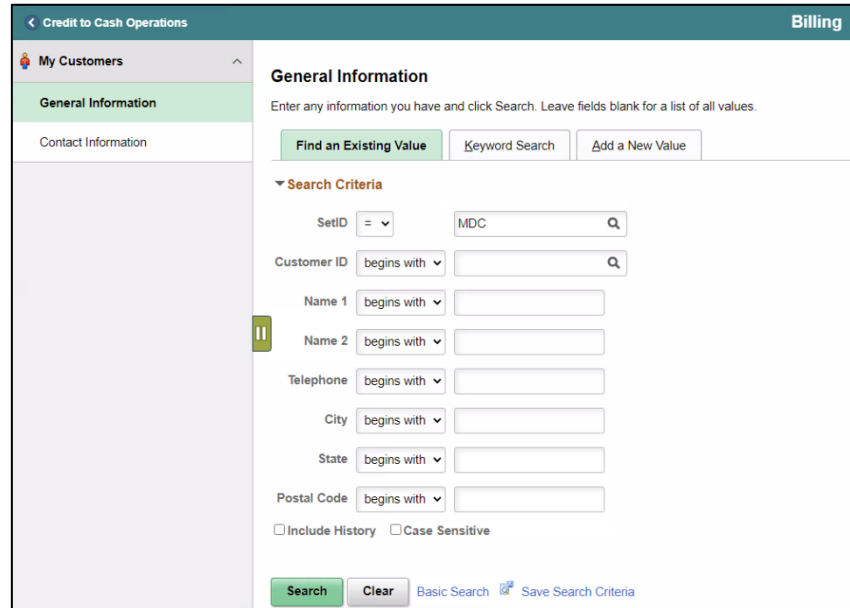



The screenshot shows the 'General Information' search form. It includes a header with a back arrow and the title 'General Information'. Below the header, there is a search bar with a 'Find an Existing Value' button, a 'Keyword Search' input field, and an 'Add a New Value' button. The 'Search Criteria' section contains several dropdown menus and input fields for searching by SetID, Customer ID, Name 1, Name 2, Telephone, City, State, and Postal Code. 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

- 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.

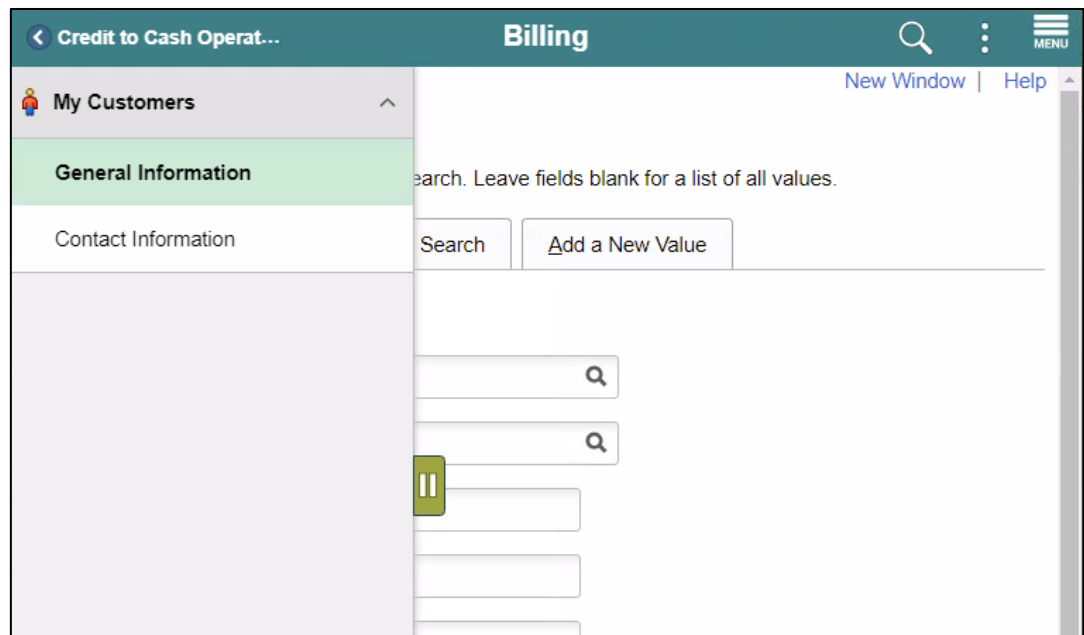


The screenshot displays the 'My Customers' interface within the 'Credit to Cash Operations' section. The left sidebar shows a navigation tree with 'My Customers' expanded, containing 'General Information' (selected) and 'Contact Information'. The main content area is titled 'General Information' and includes a search bar with buttons for 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. Below the search bar, the 'Search Criteria' section contains several 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 users have completed the lesson, users should be able to.

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

## Lesson 2: Setting Up INFORMS for Your Work

### Lesson 2: Overview

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

- How to add Favorites
- Using WorkCenters

## Lesson 2: Setting Up INFORMS for Your Work

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



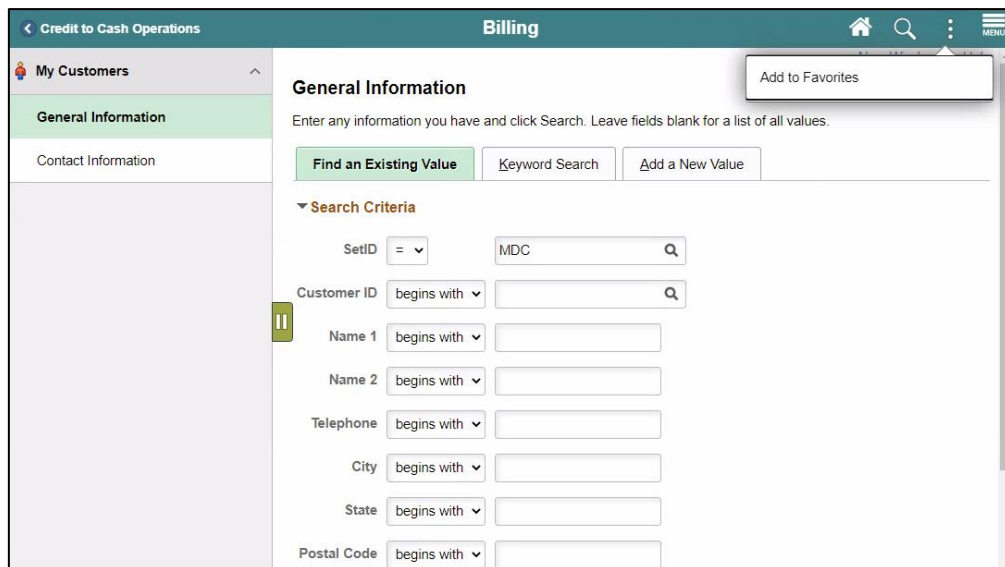
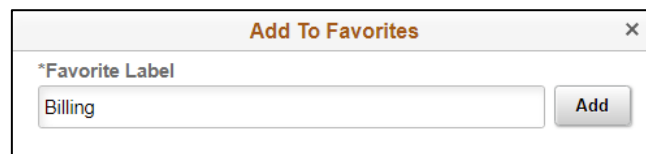
Term	Definition
<b>WorkCenter</b>	A Dashboard for users to manage their workload. It is a one-stop-shop for users performing different business transactions to take action on alerts and view reports and analytics. The built-in intelligence delivers work to users instead of users searching for information.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

## Lesson 2: Setting Up INFORMS for Your Work

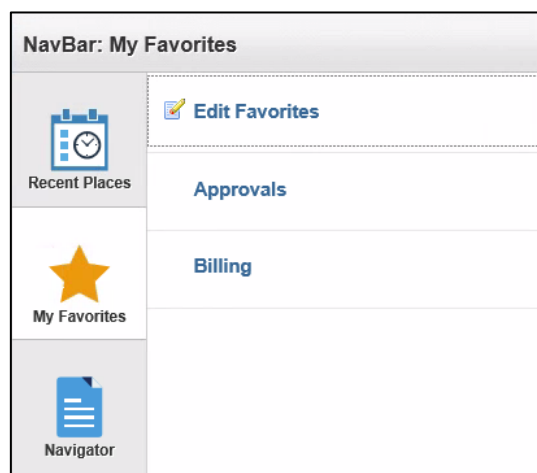
**Lecture 1:** This lesson will review how to add Favorites.

### 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.

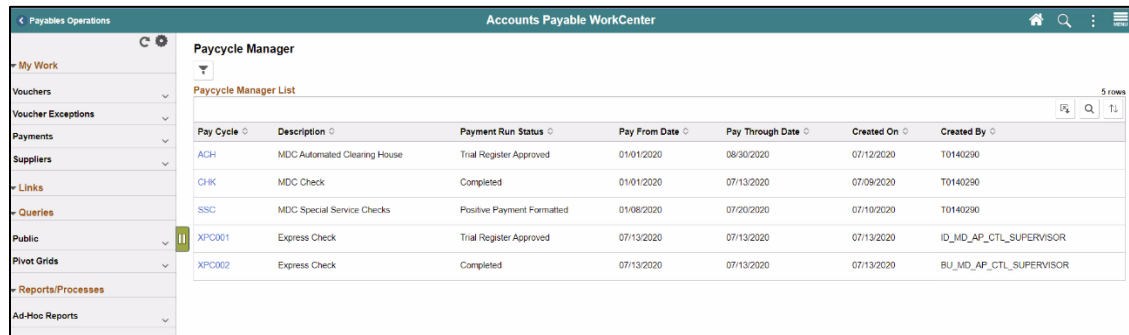


## Lesson 2: Setting Up INFORMS for Your Work

### 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 users have completed the Setting up INFORMS for Your Work lesson, users 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.



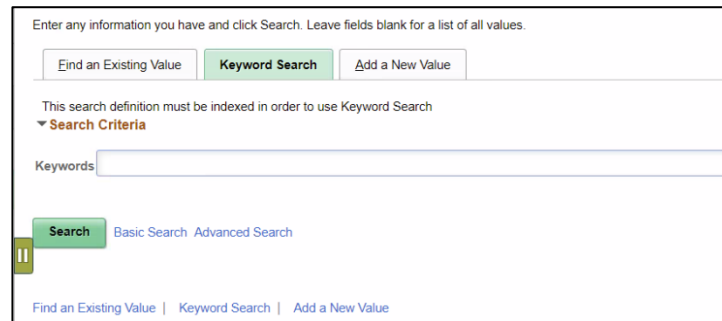
Term	Definition
<b>Component</b>	An INFORMS Component is a collection of pages that are logically grouped.
<b>Wildcards</b>	Characters that assist with the search function. The three wildcards are the percent sign (%), which directs the search function to match one or more characters in the search box;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

## Lesson 3: Entering and Finding Data in INFORMS

**Lecture 1:** This lesson will review finding existing values.

### How to Find Data

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



The screenshot shows a search interface with the following elements:

- Header: "Enter any information you have and click Search. Leave fields blank for a list of all values."
- Navigation tabs: "Find an Existing Value", "Keyword Search" (active), and "Add a New Value".
- Message: "This search definition must be indexed in order to use Keyword Search".
- Section: "Search Criteria" with a dropdown arrow.
- Input field: "Keywords" with a text box.
- Buttons: "Search" (green), "Basic Search", and "Advanced Search".
- Footer: "Find an Existing Value | Keyword Search | Add a New Value".

- 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

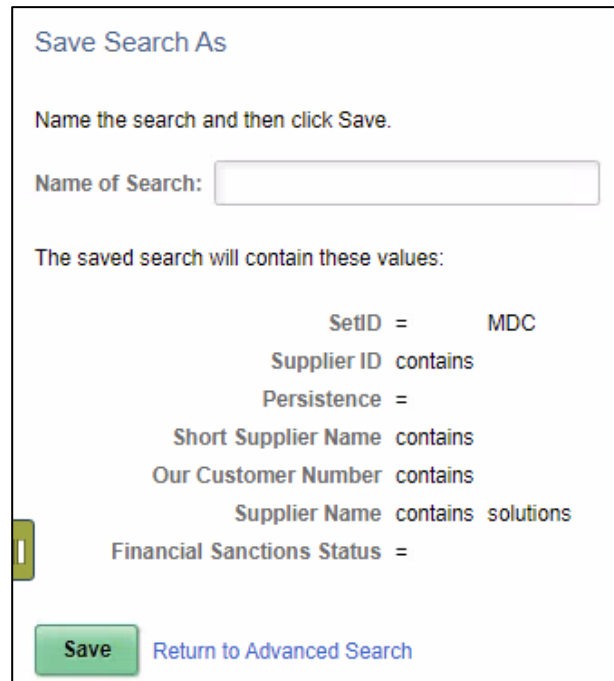
- Using Operators.** when performing an advanced search, users can use a variety of operators to narrow searches. For example, users can search for customers by first letter, by values that are less than or greater than a specified amount, etc. Operator examples include.

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







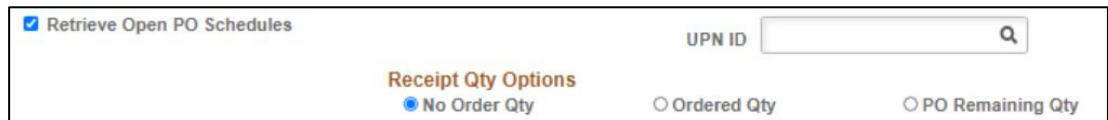
## Lesson 3: Entering and Finding Data in INFORMS

### 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 users have completed the lesson, users should be able to.

- How to Find Data
- How to Enter Data

## Lesson 4: INFORMS Approvals

### Lesson 4: Overview

#### Learning Objectives

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

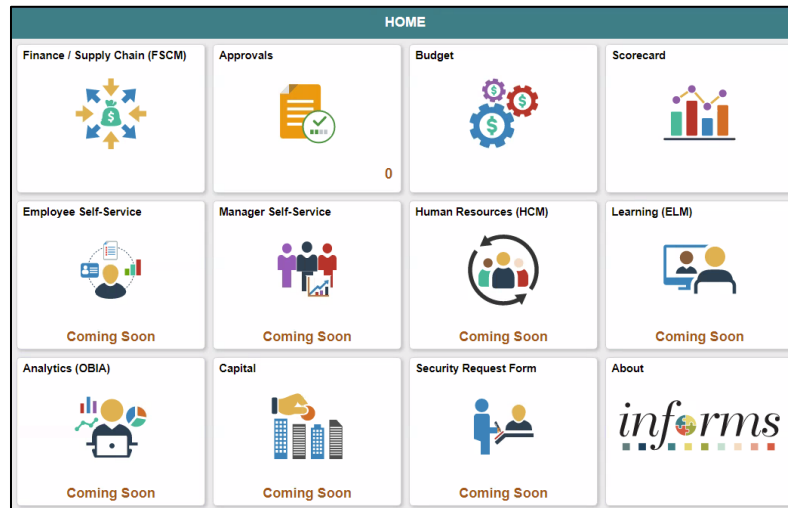
- Navigate to the Approval Worklist
- Understand Approval Components
- Understand the Approval Chain

## Lesson 4: INFORMS Approvals

### Lecture 1: INFORMS Approvals

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

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



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

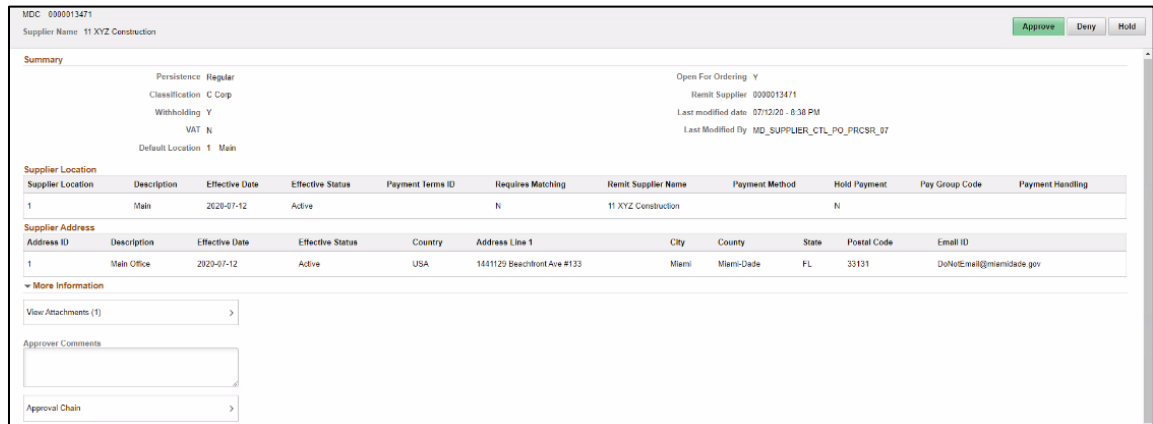
Employee Self-Service			
Pending Approvals			
View By	Type		
All	14		
Supplier	11		
Supplier Change Request	2		
Supplier Registration	1		
Supplier	MDC / 0000013473	MD_SUPPLIER_CTL_PO_PRCR_01	Routed 07/13/2020
Supplier	MDC / 0000013479	MD_SUPPLIER_CTL_PO_PRCR_03	Routed 07/14/2020
Supplier	MDC / 0000013477	MD_SUPPLIER_CTL_PO_PRCR_01	Routed 07/14/2020
Supplier	MDC / 0000013480	MD_SUPPLIER_CTL_PO_PRCR_02	Routed 07/14/2020
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	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	Open For Ordering: Y
Classification: C Corp	Remit Supplier: 0000013471
Withholding: Y	Last modified date: 07/12/25 - 8:38 PM
VAT: N	Last Modified By: MD_SUPPLIER_CTL_PO_PRCBR_07
Default Location: 1 Main	

**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		

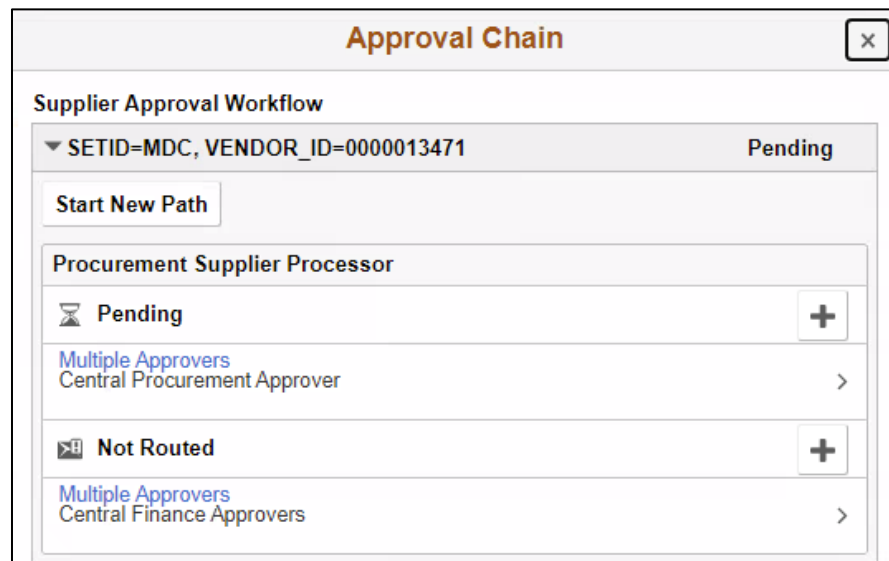
**Supplier Address**

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	DuNoEmail@miamidade.gov

[View Attachments \(1\)](#)

**Approval Chain**

- 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



Congratulations on completing the INFORMS Approvals lesson. Users 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.



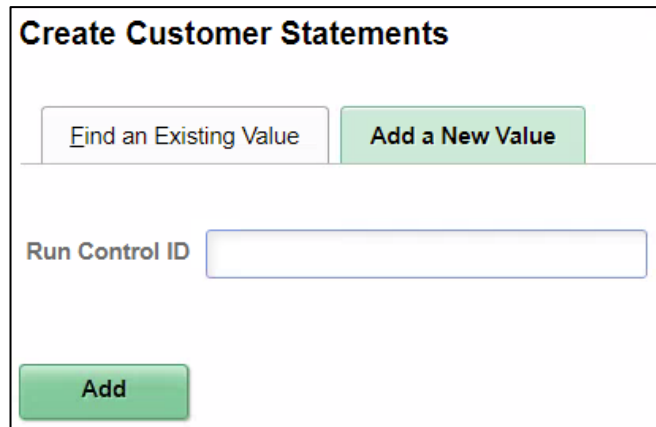
Term	Definition
<b>PeopleTools</b>	PeopleTools provides the underlying technology for INFORMS applications. All INFORMS applications are built, deployed and maintained using PeopleTools.
<b>Process Scheduler</b>	The primary role of Process Scheduler is to support the INFORMS application environment. 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.
<b>Report Manager</b>	Report Manager provides a single place where the users can view previously run reports.
<b>Run Control ID</b>	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.

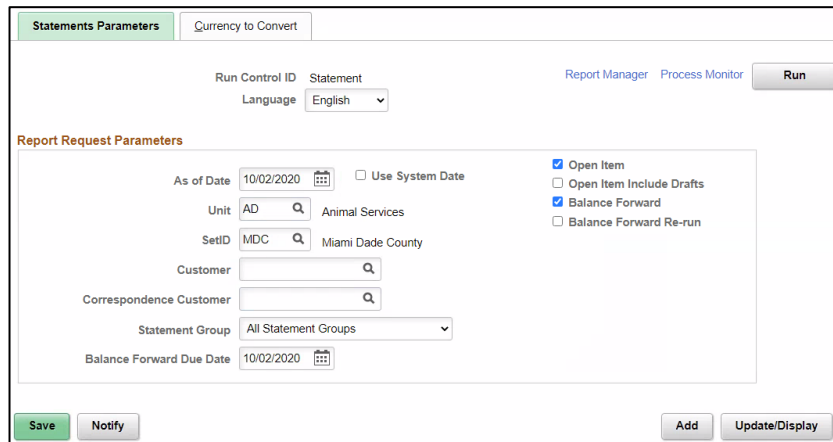


**Create Customer Statements**

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

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

**Search Results**

\*Folder View

**Query**

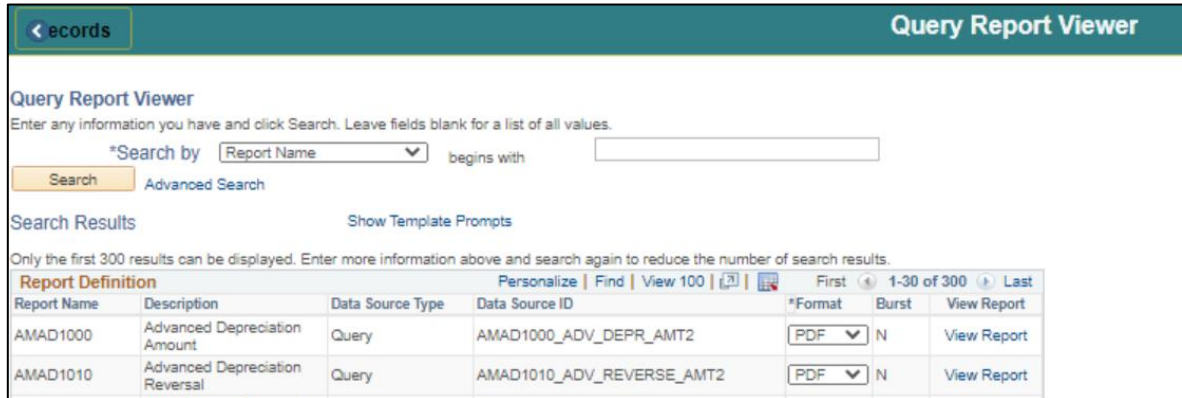
1-30 of 159 [View 100](#)

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		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
APY0005_SPEEDCHARTS	SpeedCharts	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
APY0006_TAX_AUTHORITIES	Tax Authorities	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
APY0007_TAX_CODES	Tax Codes	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
APY0010_BUSINESS_UNIT_LIST	Business Unit List	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
APY0012_ACCTG_ENTRY_TMPLT	Accounting Entry Template	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
APY1070_AP_SBI_VENDOR	AP SBI Suppliers	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

## 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

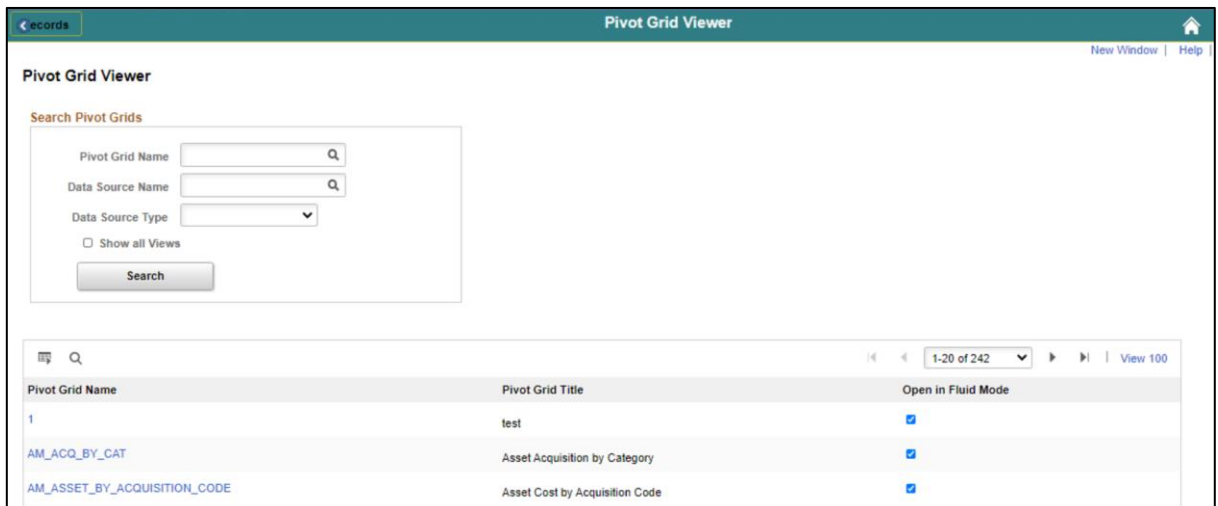
Search Advanced Search

**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	<a href="#">View Report</a>
AMAD1010	Advanced Depreciation Reversal	Query	AMAD1010_ADV_REVERSE_AMT2	PDF	N	<a href="#">View Report</a>

- **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

Search

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"/>

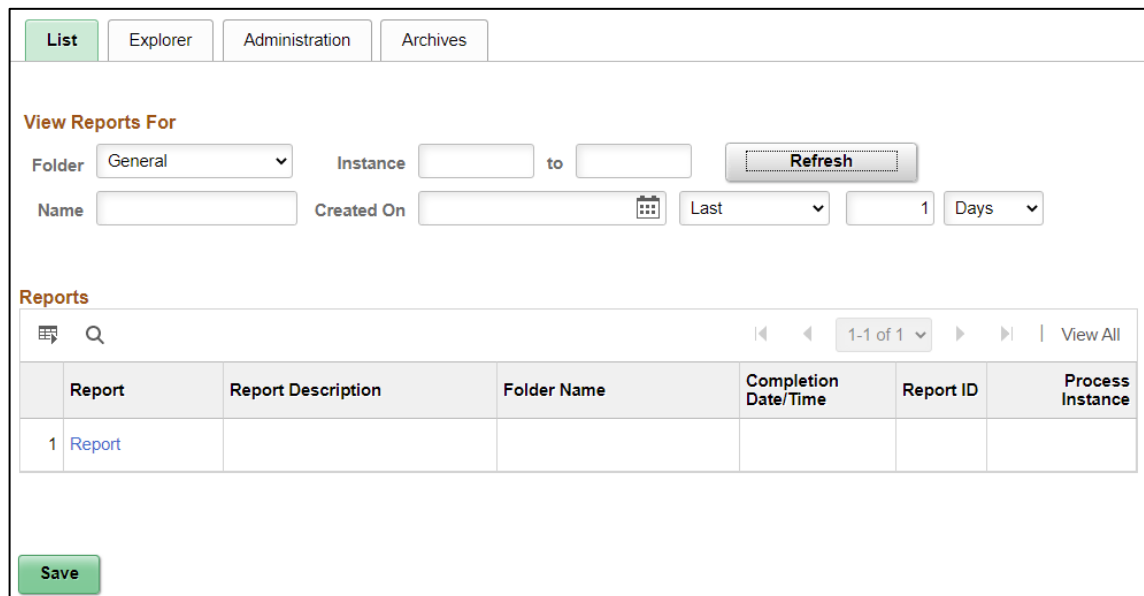
- Similarly, as stated in Module 2, the reports that users will need for operations will be published in the WorkCenters of each module.

## 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.



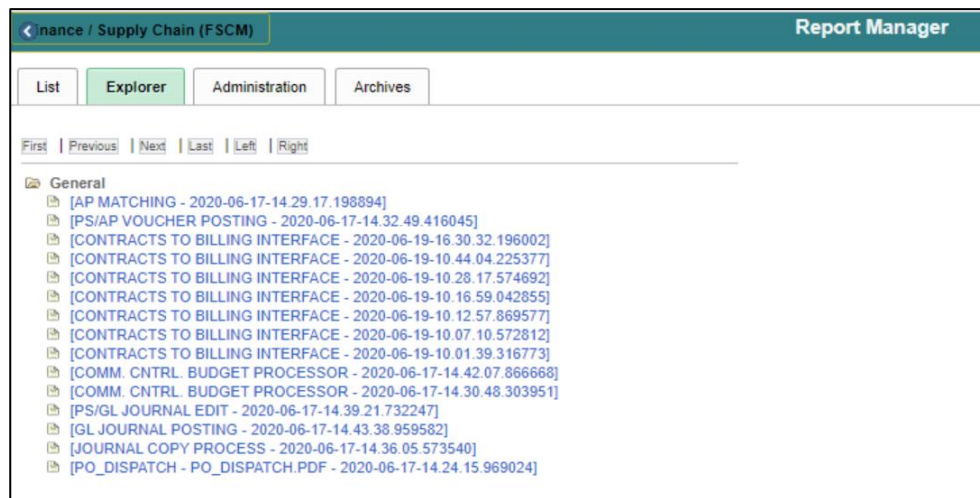
The screenshot shows the 'Report Manager' interface. At the top, there are tabs: 'List' (selected), 'Explorer', 'Administration', and 'Archives'. Below the tabs, there's a section titled 'View Reports For' with filters: 'Folder' (dropdown set to 'General'), 'Instance' (input field), 'to' (input field), 'Refresh' button, 'Name' (input field), 'Created On' (calendar icon), 'Last' (dropdown), '1' (input field), and 'Days' (dropdown). Below this is a section titled 'Reports' with a search bar, a table of reports, and a 'Save' button at the bottom left.

	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	<a href="#">Report</a>					

- 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.

**Report**

Report ID 37865      Process Instance 188443      [Message Log](#)

Name AP\_PSTVCHR      Process Type Application Engine

Run Status Success

PS/AP Voucher Posting

**Distribution Details**

Distribution Node BALANCED      Expiration Date 06/24/2020

**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">AE_AP_PSTVCHR_188443.stdout</a>	292	06/17/2020 2:32:49.416045PM EDT

**Distribute To**

Distribution ID Type	Distribution ID
User	T0140285

## Lesson 1: How to run reports in INFORMS

### Lesson Summary



Now that users have completed the lesson, users 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.



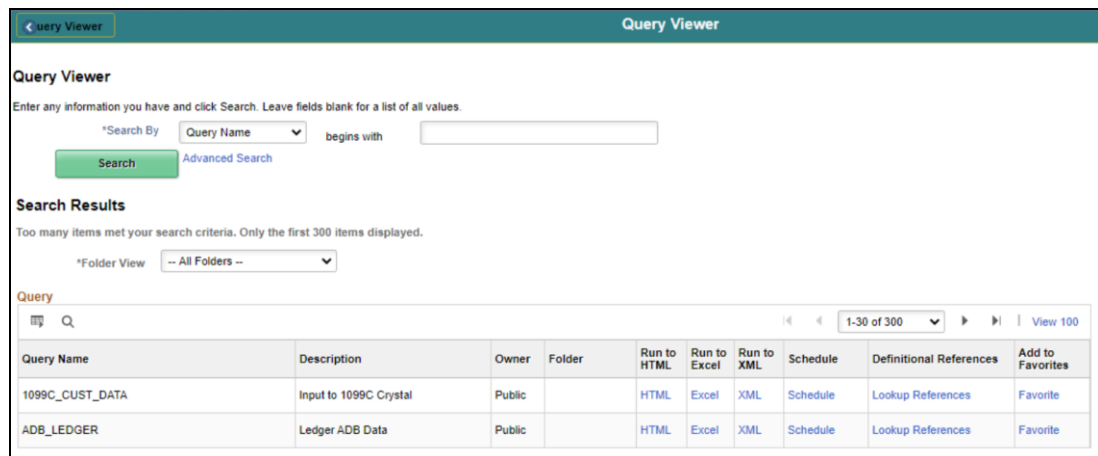
Term	Definition
<b>INFORMS Inquiry</b>	INFORMS pages within each module allow the users to look up existing information.
<b>INFORMS Query</b>	Run pre-defined specific queries to extract precise information.
<b>Pivot Grid</b>	INFORMS Pivot Grid supports operational dashboard reporting within the PeopleTools 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.
<b>XML</b>	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

[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		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
ADB_LEDGER	Ledger ADB Data	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

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

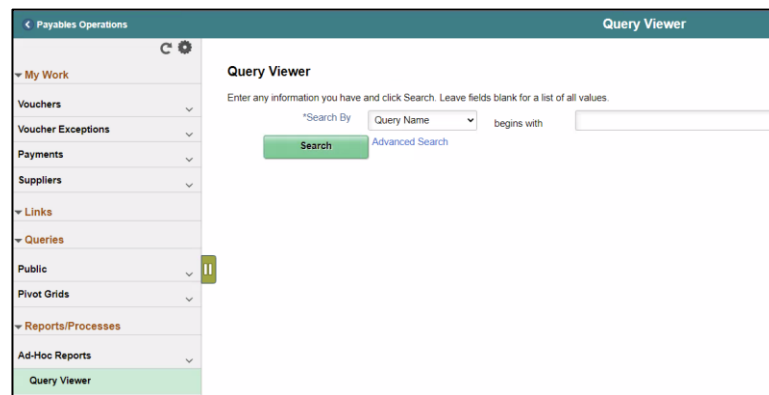
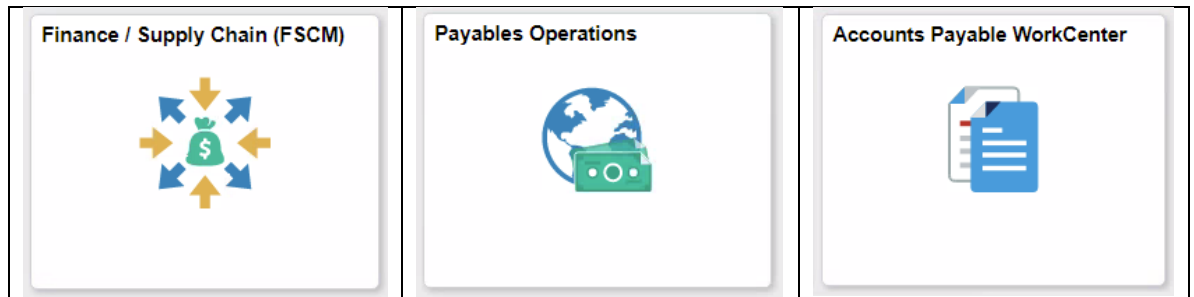
- For scheduled queries, all results are routed and viewable in the INFORMS Report Manager.

## Lesson 2: How to Run Queries in INFORMS

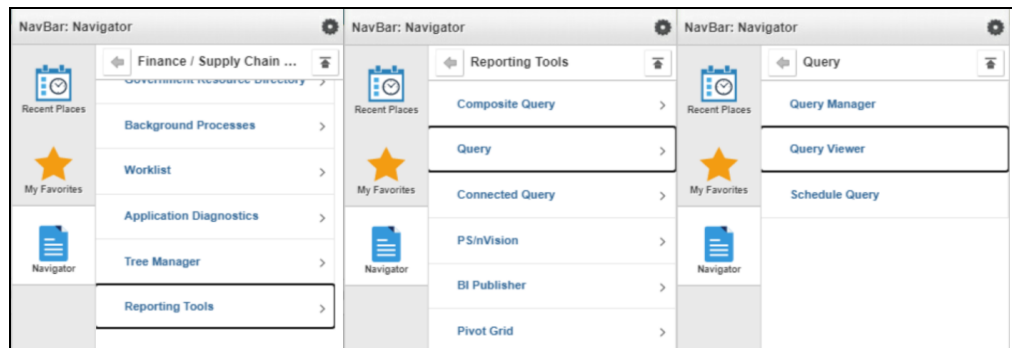
**Lecture 2:** This lesson will review how to run pre-defined Queries.

### 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.**



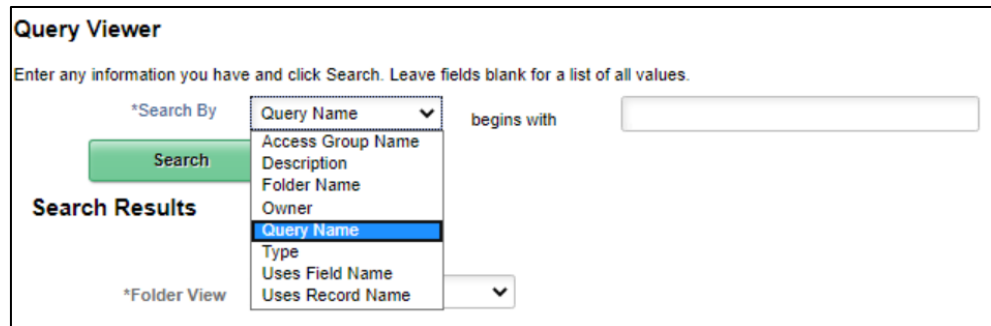
- The **Query Viewer Search Results** page can be found by using the NavBar: **Finance / Supply Chain (FSCM) > Reporting Tools > Query > Query Viewer.**



## 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.



**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

**Search Results**

\*Folder View Query Name Type Uses Field Name Uses Record Name

The screenshot shows the 'Query Viewer' search interface. It includes a search bar with a dropdown menu for 'Search By' (currently set to 'Query Name') and a 'begins with' text input field. A green 'Search' button is present. Below the search bar, the 'Search Results' section is visible, showing a list of search criteria: 'Query Name', 'Type', 'Uses Field Name', and 'Uses Record Name'. A '\*Folder View' checkbox is also shown.

- 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
Owner	=	

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		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

- 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 users have completed the lesson, users should be able to.

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



## Lesson 3: BI Publisher Reporting

- Lesson 3:** At the conclusion of this lesson, participants will be able to.
- Overview**
- Run BI Publisher Reports

## Lesson 3: BI Publisher Reporting

### Key Terms

The following key term is used in this Lesson:



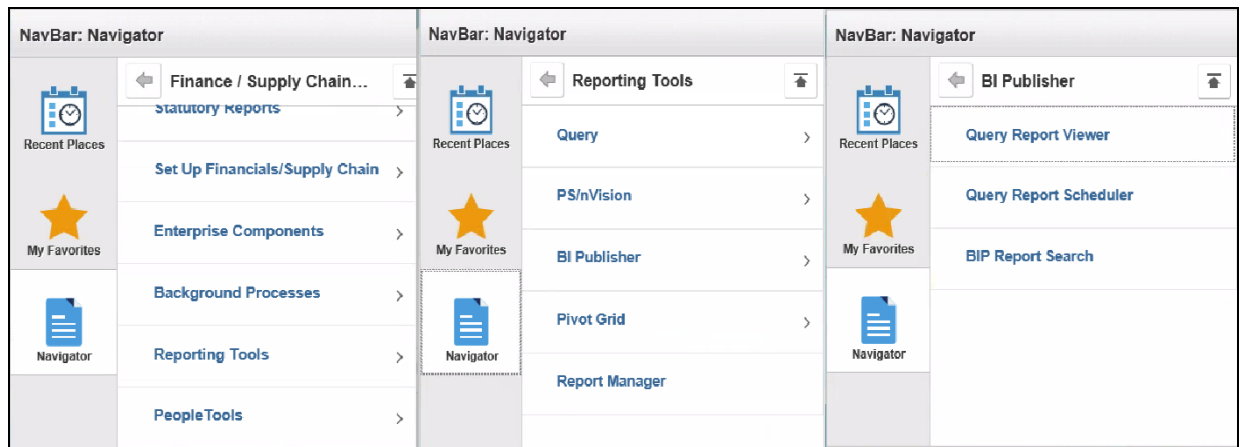
Term	Definition
<b>BI Publisher (XML Publisher)</b>	BI Publisher for INFORMS provides an environment for the power business users to manage templates, data sources, reports, translations, content components and to produce reports according to user-defined criteria. BI Publisher for INFORMS also can burst 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.**

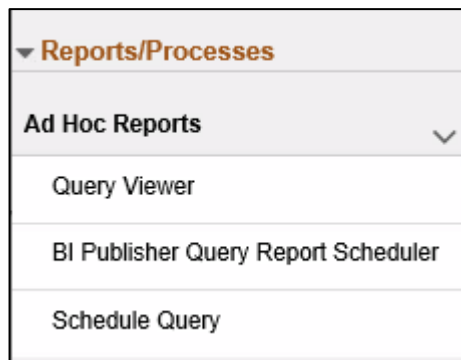


- The Query Viewer can be found in the users WorkCenter. Below is an example navigation using the Project Costing WorkCenter. **Finance / Supply Chain > Finance & Accounting > GL WorkCenter > Report/Processes > Ad Hoc Reports > Query Viewer**



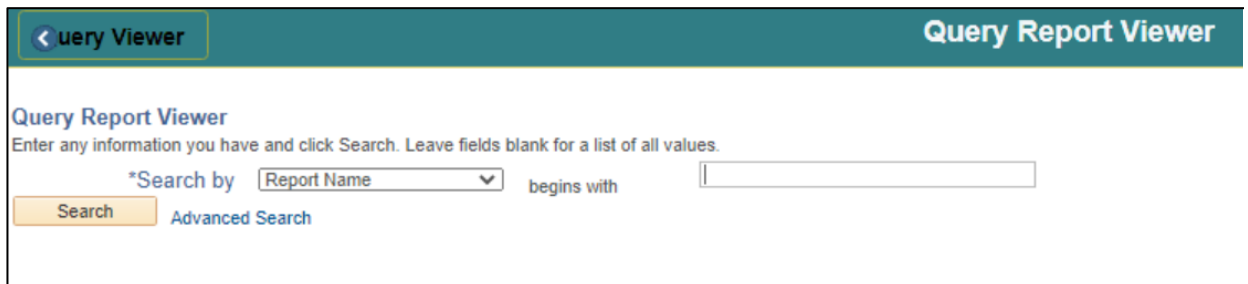
## Lesson 3: BI Publisher Reporting

### 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.

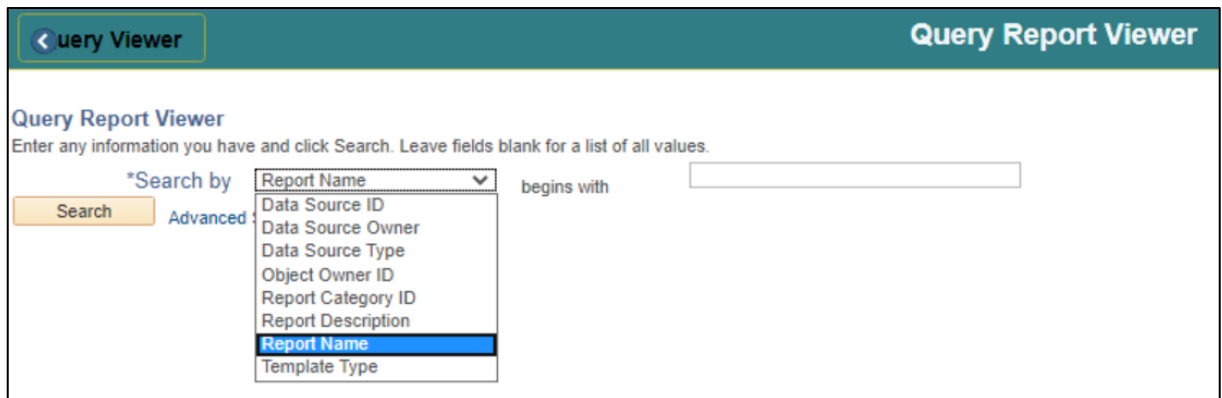


A screenshot of the "Query Report Viewer" search page. The page has a teal header with a "Query Viewer" button on the left and "Query Report Viewer" text on the right. Below the header, the title "Query Report Viewer" is followed by the instruction "Enter any information you have and click Search. Leave fields blank for a list of all values." The search section includes a "\*Search by" label, a "Report Name" dropdown menu, and a "begins with" label followed by a text input field. Below these fields are two buttons: "Search" and "Advanced Search".

## Lesson 3: BI Publisher Reporting

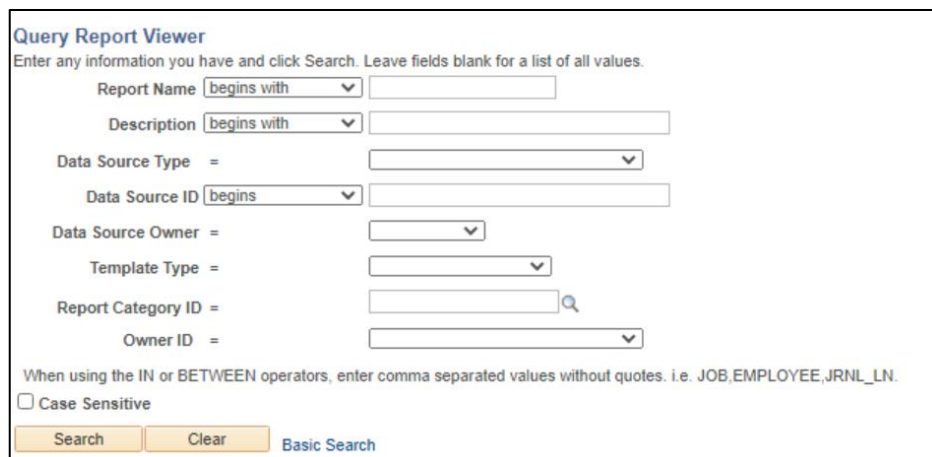
### Lecture 1: Run BI Publisher Reports

- The search page defaults to the **Search by Report Name**. On 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.



The screenshot shows the 'Query Report Viewer' interface. At the top, there is a teal header bar with a back arrow and 'Query Viewer' on the left, and 'Query Report Viewer' on the right. Below the header, the title '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.' On the left, there is a 'Search' button and a '\*Search by' dropdown menu. The dropdown menu is open, showing a list of search criteria: Report Name (highlighted), Data Source ID, Data Source Owner, Data Source Type, Object Owner ID, Report Category ID, Report Description, and Template Type. To the right of the dropdown, there is a 'begins with' label and a text input field.

- 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.



The screenshot shows the 'Query Report Viewer' interface in advanced search mode. The title '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.' Below this, there are several search criteria with dropdown menus for operators and text input fields for values:
 

- Report Name: begins with [text input]
- Description: begins with [text input]
- Data Source Type: = [dropdown]
- Data Source ID: begins [dropdown]
- Data Source Owner: = [dropdown]
- Template Type: = [dropdown]
- Report Category ID: = [text input]
- Owner ID: = [dropdown]

 At the bottom, there is a note: 'When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.' Below this note is a 'Case Sensitive' checkbox. At the bottom of the form, there are 'Search' and 'Clear' buttons, and a 'Basic Search' link.

## 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  begins with

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

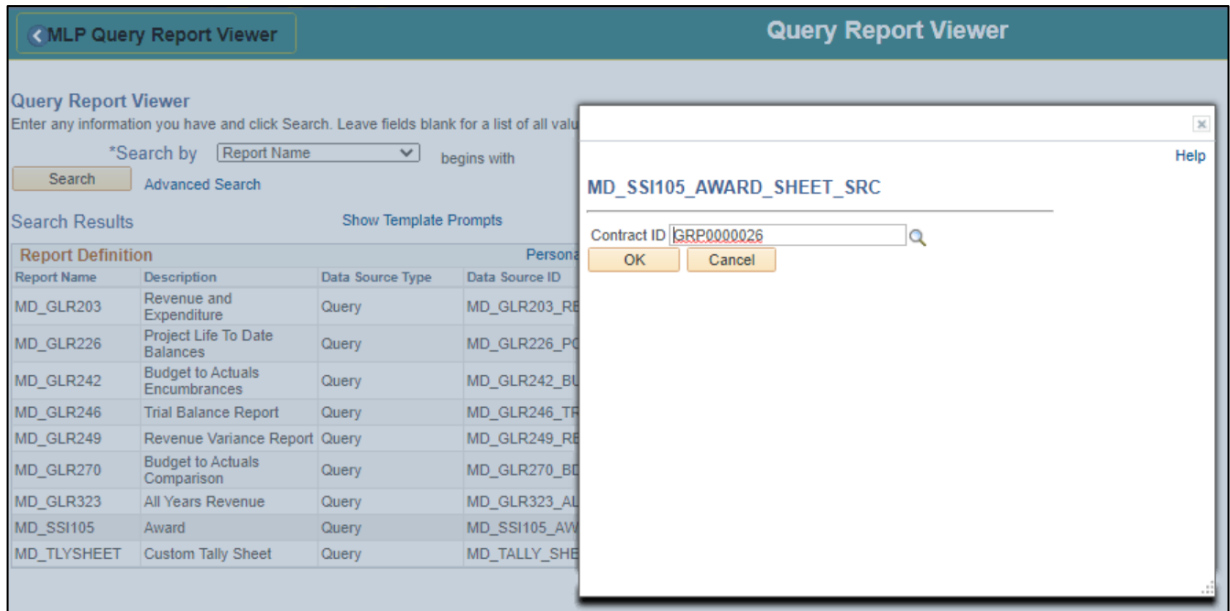
Search Results [Show Template Prompts](#)

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	<a href="#">View Report</a>			
MD_GLR226	Project Life To Date Balances	Query	MD_GLR226_PC_LIFE_TO_DATE_QRY	XLS	N	<a href="#">View Report</a>			
MD_GLR242	Budget to Actuals Encumbrances	Query	MD_GLR242_BUDGET_TO_ACTUALS	PDF	N	<a href="#">View Report</a>			
MD_GLR246	Trial Balance Report	Query	MD_GLR246_TRIAL_BALANCE_REPORT	HTM	N	<a href="#">View Report</a>			
MD_GLR249	Revenue Variance Report	Query	MD_GLR249_REVENUE_VARIANCE_RPT	HTM	N	<a href="#">View Report</a>			
MD_GLR270	Budget to Actuals Comparison	Query	MD_GLR270_BDGT_ACTUALS_COMPARE	PDF	N	<a href="#">View Report</a>			
MD_GLR323	All Years Revenue	Query	MD_GLR323_ALL_YEARS_REVENUES	RTF	N	<a href="#">View Report</a>			
MD_SSI105	Award	Query	MD_SSI105_AWARD_SHEET_SRC	PDF	N	<a href="#">View Report</a>			
MD_TLYSHEET	Custom Tally Sheet	Query	MD_TALLY_SHEET	XLS	N	<a href="#">View Report</a>			

## 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.

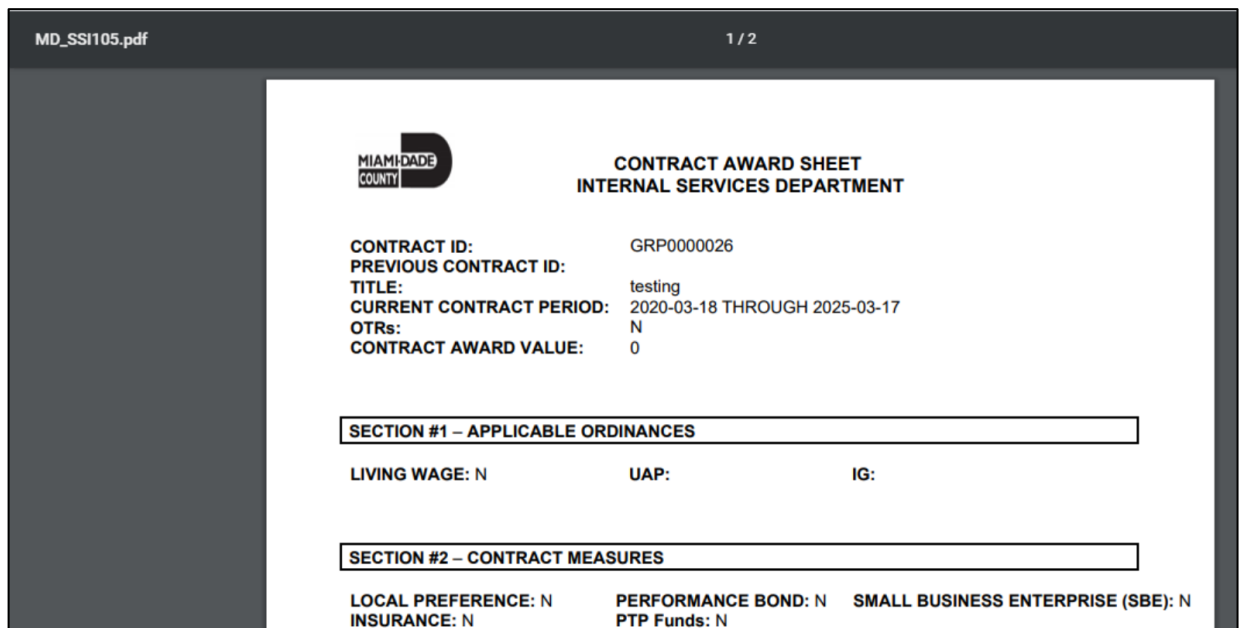
\*Search by  begins with

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 users have completed the lesson, users 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.



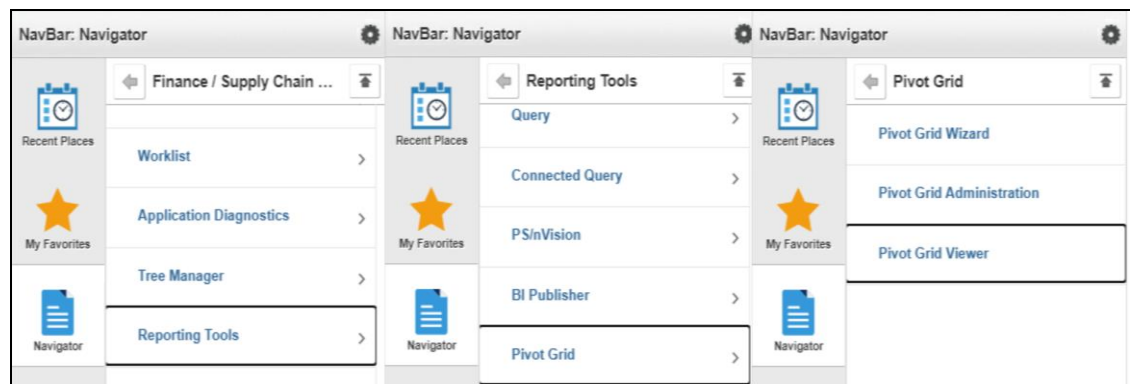
Term	Definition
<b>Data Source</b>	Is the location where the data used by the tool comes from. In the case of Pivot Grids and BI Publishers, it is usually INFORMS Query.
<b>Pivot Grid</b>	INFORMS Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table 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.

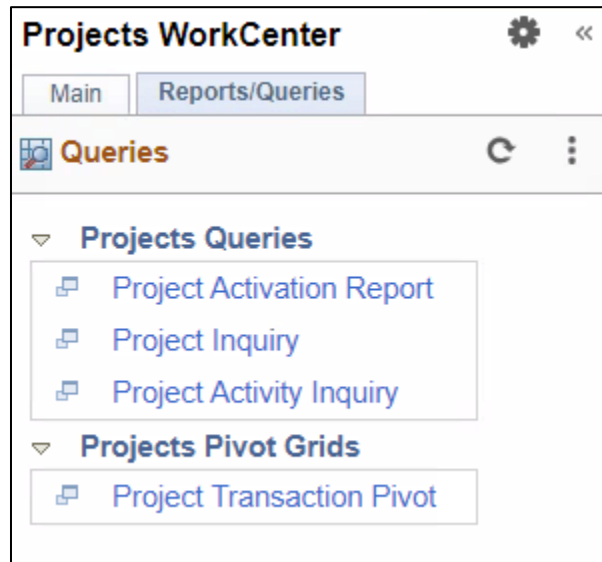
- **Pivot Grid Viewer** is the component that Pagelet Wizard, applications, and so on use to view Pivot Grid models. Pivot Grid Viewer describes the pivot grid attributes (Pivot Grid name, Query runtime prompt values, grid axis information, grid view options, chart type information and display options) 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

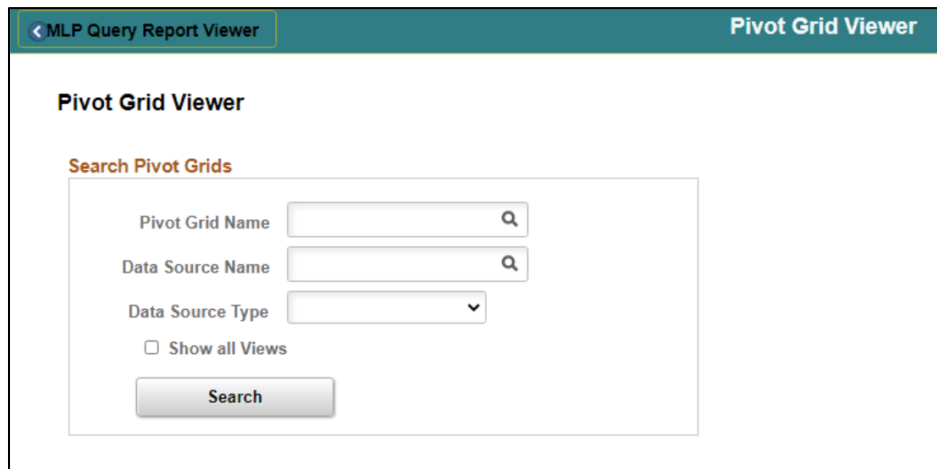
- The Pivot Grid can be found in the users WorkCenter. Below is an example navigation using the Project Costing WorkCenter. **Finance / Supply Chain > Project Management > Projects WorkCenter > Report/Queries > Projects Pivot Grids**



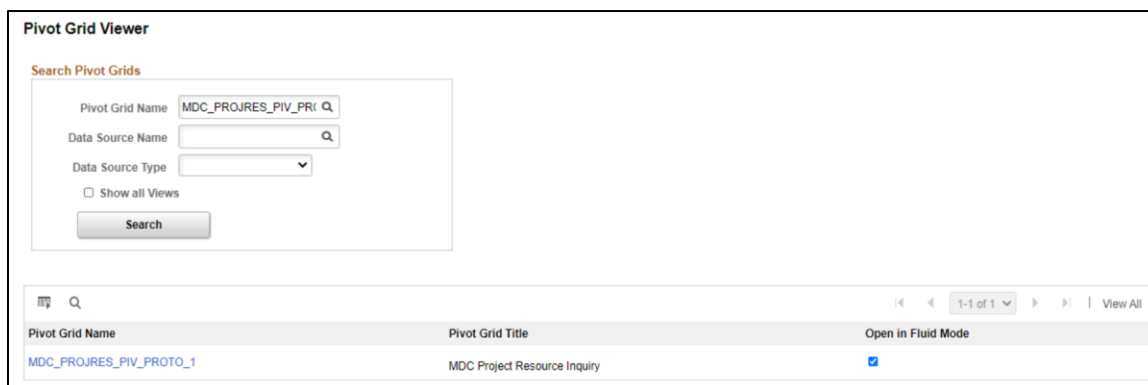
## Lesson 4: Pivot Grid

### 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.

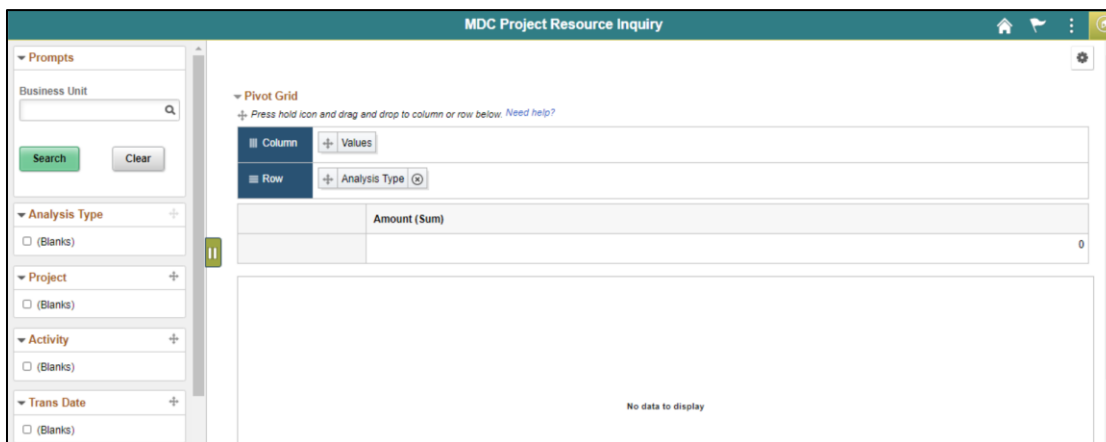


Pivot Grid Name	Pivot Grid Title	Open in Fluid Mode
MDC_PROJRES_PIV_PROTO_1	MDC Project Resource Inquiry	<input checked="" type="checkbox"/>

## 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.

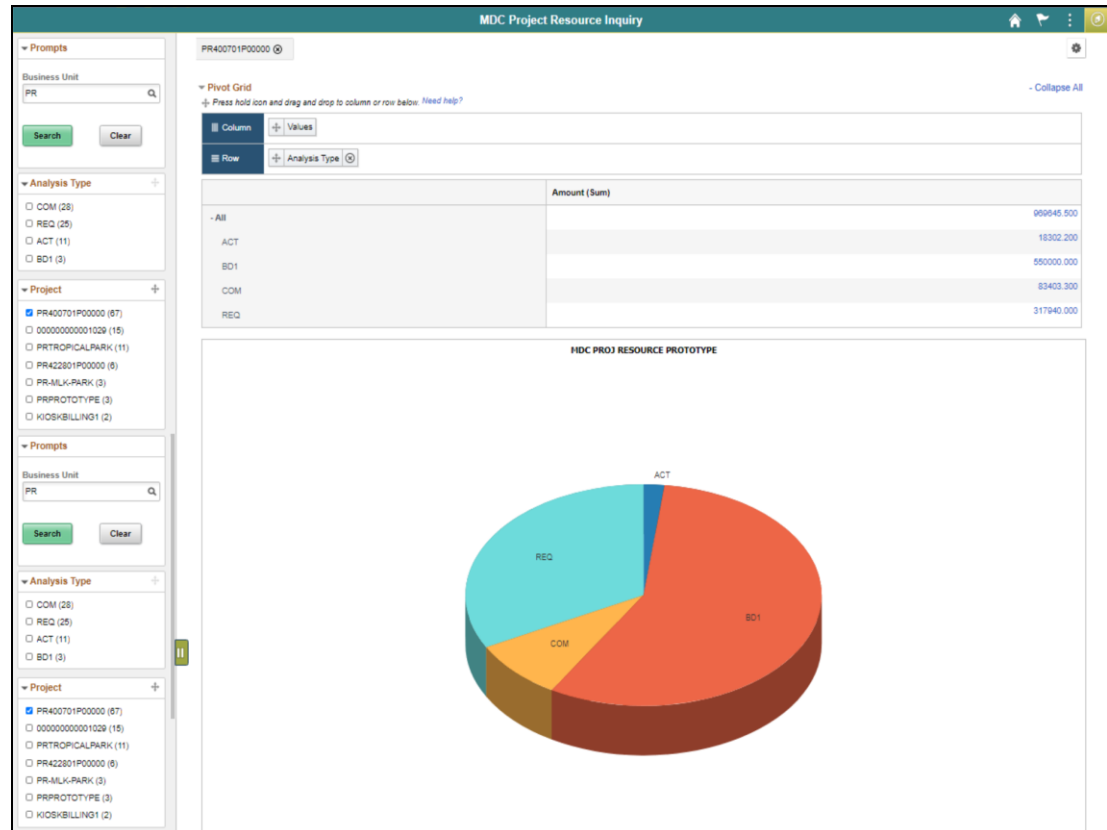


The screenshot displays the 'MDC Project Resource Inquiry' report interface. On the left, a 'Prompts' sidebar contains several filters: 'Business Unit' with a search field and 'Search'/'Clear' buttons; 'Analysis Type' with a '(Blanks)' option; 'Project' with a '(Blanks)' option; 'Activity' with a '(Blanks)' option; and 'Trans Date' with a '(Blanks)' option. 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 of configuration: '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 users have completed the Pivot Grid lesson, users should be able to.

- Run Pivot Grid Reports



## Module 4. INFORMS User Productivity Kit (UPK)

### Lessons

This module includes the following lessons.

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

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

### Lesson 1: Overview

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

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

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

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

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

### Key Terms

The following key terms are used in this module.



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

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

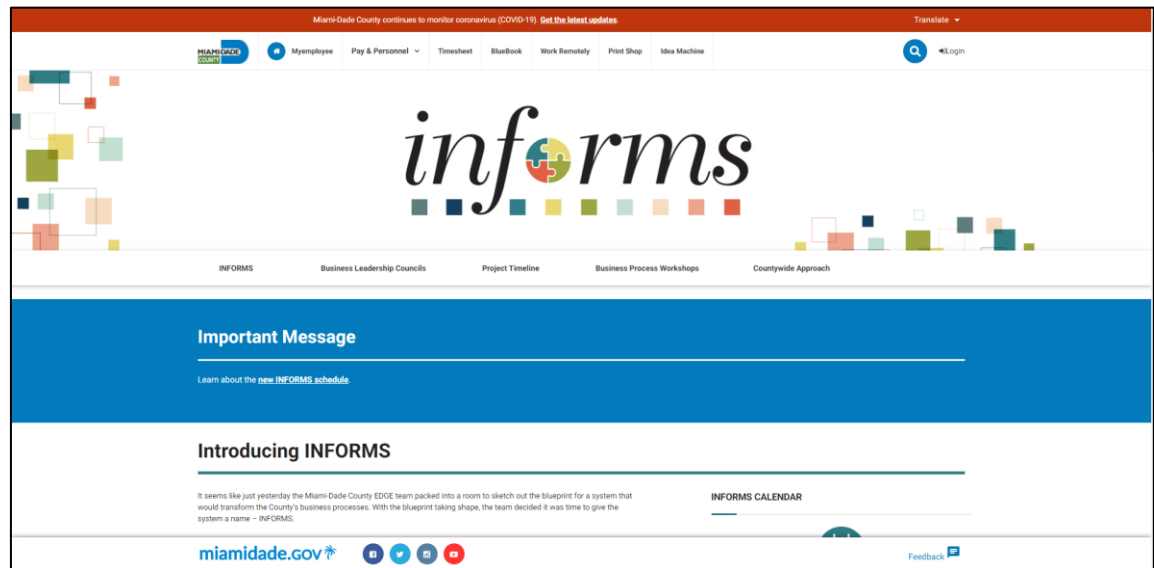
### Lecture 1: How to access the User Productivity Kit (UPK) for Online Help

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

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

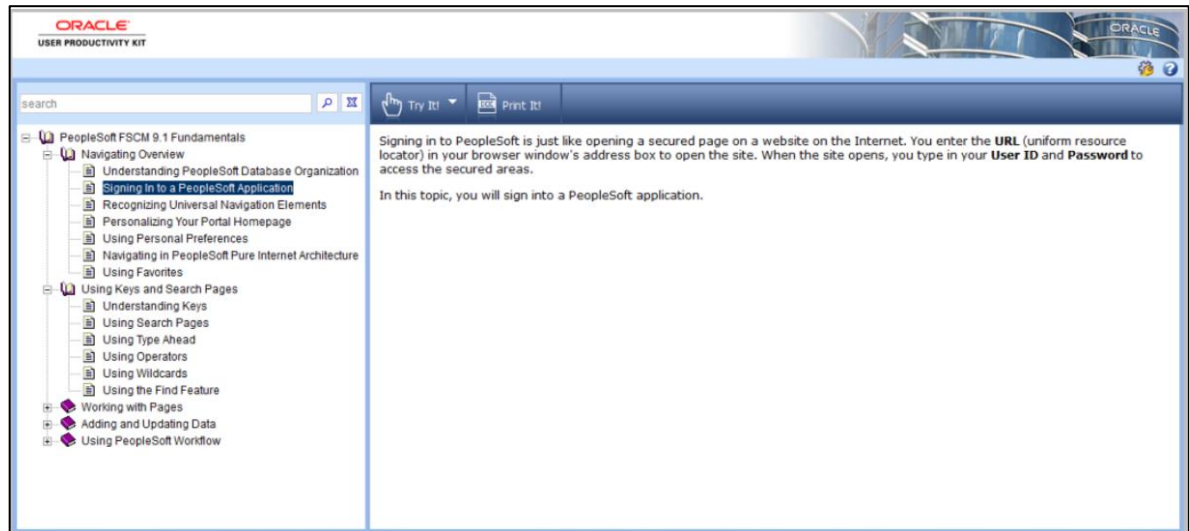
UPK Player is launched in an internet browser and provides an interactive simulation with multiple playback options.

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






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

Lecture 2: This lesson will review how to use the UPK Player.  
How to  
use the  
UPK Player



### Viewing Topics (Outline)

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

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

### Lecture 2: How to use the UPK Player

#### How to use the UPK Player.

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

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

## Lesson 1: Lesson Summary

### Lesson Summary



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

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



## Module 5: Course Summary

### Course Summary



The Course Summary module covers three topics.

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

## Module 5: Course Summary

### Objectives Achieved



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

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

## Module 5: Course Summary

### Additional Training and Job Aids

Users also have the following resources available to users.

#### **User Productivity Kits**

- INFORMS Navigation, Reporting and Online Help

#### **Job Aids**

- N/A

For additional information, be sure to visit.

- [Miamiidade.gov/informs](http://Miamiidade.gov/informs)

## Module 5: Course Summary

### Key Terms

The following key terms are used in this course.



Term	Definition
<b>BI Publisher (XML Publisher)</b>	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.
<b>Component</b>	An INFORMS Component is a collection of pages that are logically grouped.
<b>Dashboard</b>	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.
<b>Data Source</b>	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.
<b>Favorites</b>	A user's personal list of navigation shortcuts.
<b>INFORMS Inquiry</b>	INFORMS pages within each module allows users to look up existing information.
<b>INFORMS Query</b>	Run pre-defined specific queries to extract precise information.
<b>Main Menu</b>	A navigation menu that displays all folders, sub-folders, and links relevant for the user's role.
<b>PeopleTools</b>	PeopleTools provides the underlying technology for INFORMS applications. All INFORMS applications are built, deployed, and maintained using PeopleTools.

## Module 5: Course Summary

### Key Terms

The following key terms are used in this course.



Term	Definition
<b>Pivot Grid</b>	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.
<b>Process Scheduler</b>	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.
<b>Report Manager</b>	Report Manager provides a single place where users can view previously run reports.
<b>Run Control ID</b>	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.
<b>Search/Match</b>	A feature that enables users to search for and identify duplicate records in the database.
<b>Single Sign-on</b>	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.
<b>UPK Player</b>	The output/ format used to deploy UPK content for learning. It is launched in an internet browser and provides an interactive simulation that mimics the INFORMS system.
<b>User Productivity Kit</b>	Also known as UPK, this is a training tool used to create, deploy, and maintain learning content

## Module 5: Course Summary

**Key Terms** The following key terms are used in this course.



Term	Definition
<b>Wildcards</b>	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.
<b>WorkCenter</b>	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.
<b>XML</b>	Extensible Markup Language (XML). This is used to define data to dictate how users are represented online.