

Course ID: ERP 102

Course: INFORMS Navigation and Online Help

# Course Overview

<b>Course Description</b>	<p>This course provides a comprehensive review of the INFORMS Navigation and Online Help processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none"><li>• Module 1: Course Introduction</li><li>• Module 2: INFORMS Navigation</li><li>• Module 3: INFORMS User Productivity Kit (UPK)</li><li>• Module 4: Course Summary</li></ul>
<b>Training Audiences</b>	<ul style="list-style-type: none"><li>• All INFORMS users</li></ul>
<b>Prerequisites</b>	<ul style="list-style-type: none"><li>• ERP 101 – INFORMS Overview</li></ul>
<b>Estimated Duration</b>	<ul style="list-style-type: none"><li>• 30 Minutes</li></ul>

# Course Outline

## Content

Module 1: Course Introduction

Module 2: INFORMS Navigation

- Lesson 1: Logging in to and Navigating INFORMS
  - Lecture 1: Logging in to INFORMS
  - Lecture 2: Key Features on the INFORMS Home Page
  - Lecture 3: Key Elements of Tiles
  - Lecture 4: Using the Action Menu
  - Lecture 5: How to Use the Navigation Bar (NavBar)
  - Lecture 6: Navigation Collection

# Course Outline, Continued

## Content

- Lesson 2 Setting up INFORMS for Your Work
  - Lecture 1: How to Add Favorites
- Lesson 3 Entering and Finding Data in INFORMS
  - Lecture 1: How to Find Data
  - Lecture 2: How to Enter Data
- Lesson 4 INFORMS Approvals
  - Lecture 1. INFORMS Approval Process

# Course Outline, Continued

## Content

### Module 3: INFORMS User Productivity Kit (UPK)

- Lesson 1: INFORMS User Productivity Kit (UPK)
  - Lecture 1: How to access the User Productivity Kit (UPK) for Online Help
  - Lecture 2: How to use the UPK Player

### Module 4: Course Summary

# Module 1: Course Introduction

## Module Topics

Course Administration and Logistics

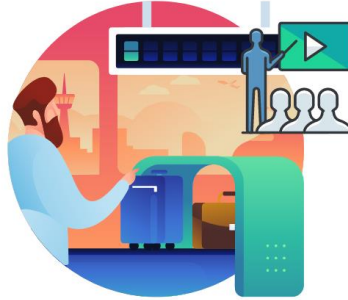
Learning Objectives

Roles and Responsibilities

# Course Administration and Logistics



To receive credit for completing this course, user must record your attendance at the beginning and end of class



Please turn off your cell phones and refrain from checking email and the Internet while in class



Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

# Learning Objectives

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



# Learning Objectives, Continued

- Entering and finding data in INFORMS
- INFORMS approval process
- How to access the User Productivity Kit (UPK) for Online Help
- How to Use the UPK Player

# Roles and Responsibilities

All INFORMS end users will participate in ERP 102 – INFORMS Navigation and Online Help.

# Module 1: Course Introduction Summary

## Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

# Module 2: INFORMS Navigation

## Module Topics

Module Introduction

Lesson 1: Logging in to and Navigating INFORMS

Lesson 2: Setting up INFORMS for Your Work

Lesson 3: Entering and Finding Data in INFORMS

Lesson 4: INFORMS Approvals

# Lesson 1: Logging in to and Navigating INFORMS

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

# Lesson 1: Key Terms

Term	Definition
<b>Dashboard</b>	The home page for the INFORMS application that displays a main menu for easy navigation. The Dashboard lays out links, 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.

# Lecture 1: Logging in to INFORMS

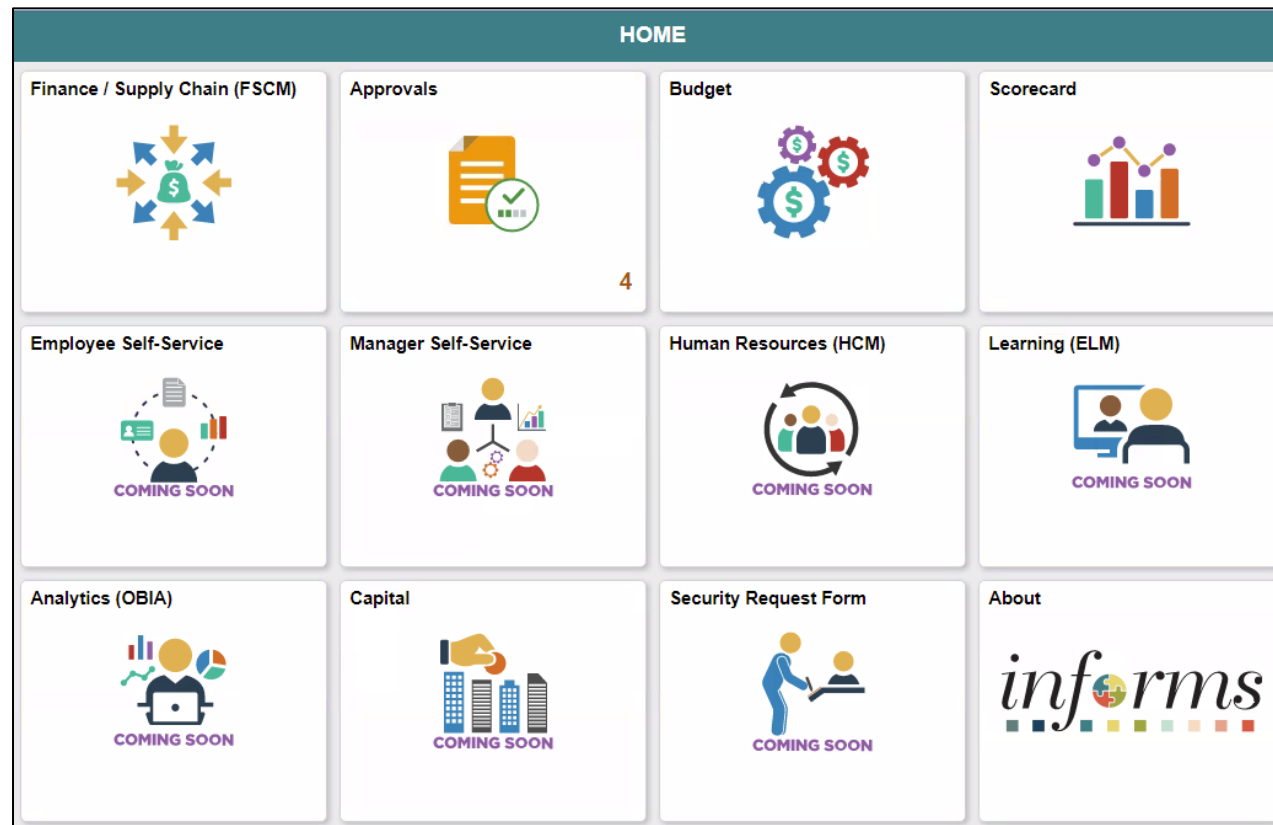
- The link to INFORMS will be available on the End-User's desktop after go-live. (JUNE 15<sup>th</sup>)



- End-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.







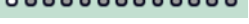


# Lecture 1: Logging in to INFORMS, Continued

Users will then be directed to the **INFORMS Portal**. To be able to use functionality and conduct transactions, users will need to select the specific Tile for their work.



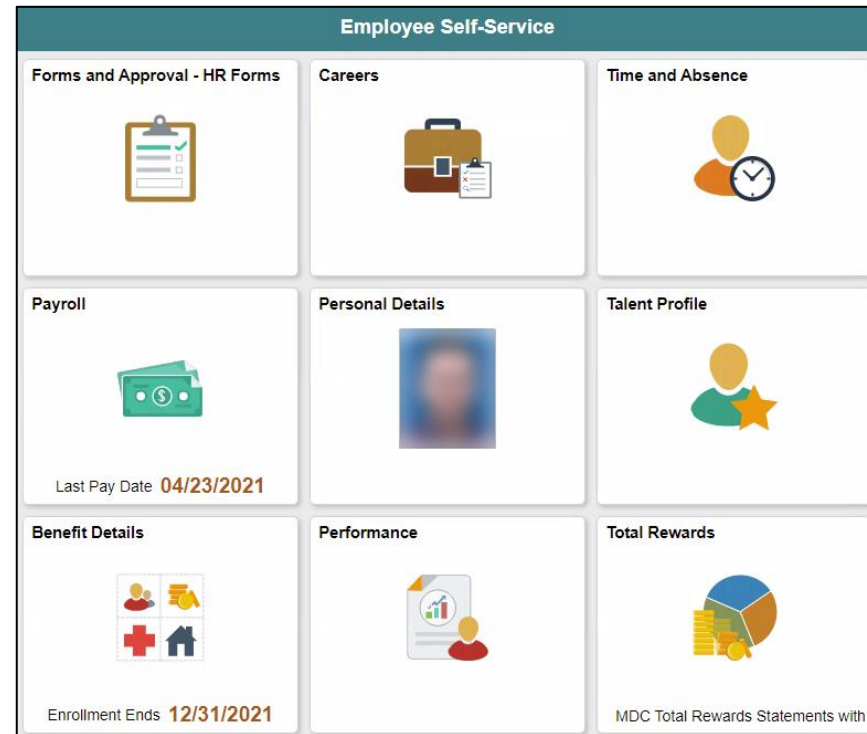


# Lecture 2: Key Features on the INFORMS Home Page

Icon	Description
	<p>Homepage drop-down selection</p> <p>When there are multiple homepages to which users have access, users switch to other fluid homepages using this drop-down list.</p>
	<p>Home / Home button</p> <p>Use to return to the default homepage, which is the fluid homepage users arrives at immediately upon sign on.</p>
	<p>Search / Search button</p> <p>Use to perform Global Search.</p>
	<p>Notify / Notifications button</p> <p>Displays the notification window showing any pending actions or alerts.</p>
	<p>Action / Action menu button</p> <p>Use to display the actions menu.</p>
	<p>NavBar / Navigation bar button</p> <p>Use to enable the navigation bar (NavBar).</p>
	<p>Homepage indicator</p> <p>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.</p>
	<p>Refresh / Refresh button</p> <p>When users access the homepage, the system 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.</p>
	<p>Homepage Tiles</p> <p>Tiles allow users a quick way to perform routine tasks, such as decision making or monitoring. Tiles give users direct access to targeted transactions.</p>

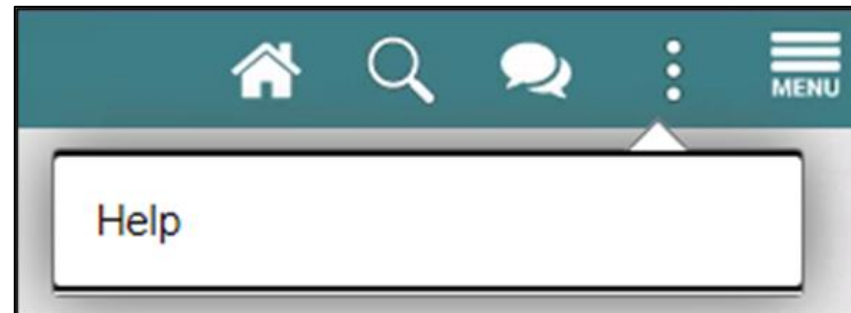
# Lecture 3: Key Elements of Tiles

Each **Homepage** dropdown is configured so that the Tiles are relevant to each module group.



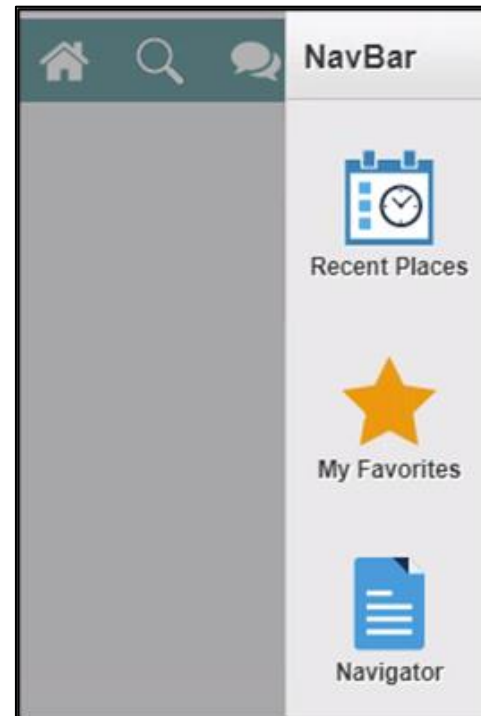
# Lecture 4: Using the Action Menu

Select the **Action** button to reveal the **Action Menu**, which contains actions users can make based on their location in the application.






# Lecture 5: 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.

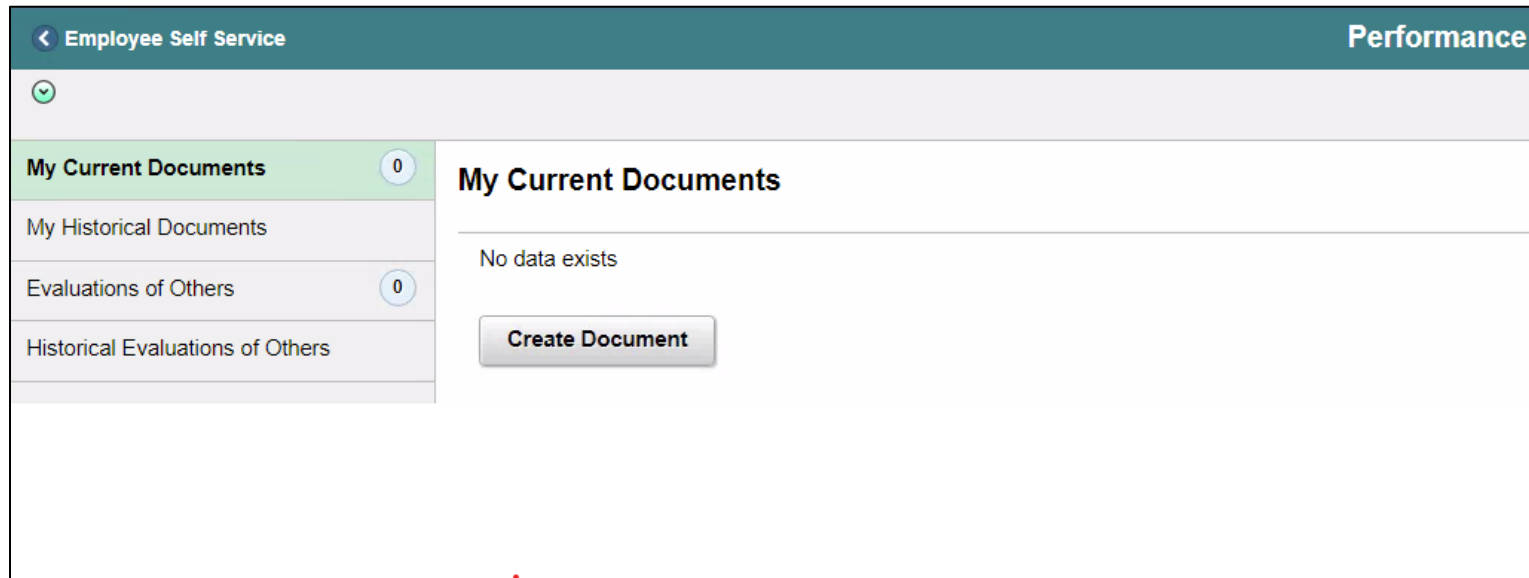


# Lecture 5: How to Use the Navigation Bar, Continued

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 the users would see when accessing INFORMS in classic mode and using the Main Menu.

# Lecture 6: Navigation Collection

A **Navigation Collection** groups together functionally similar components. This enables users to easily navigate between the different components.

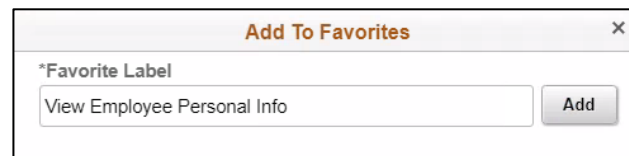
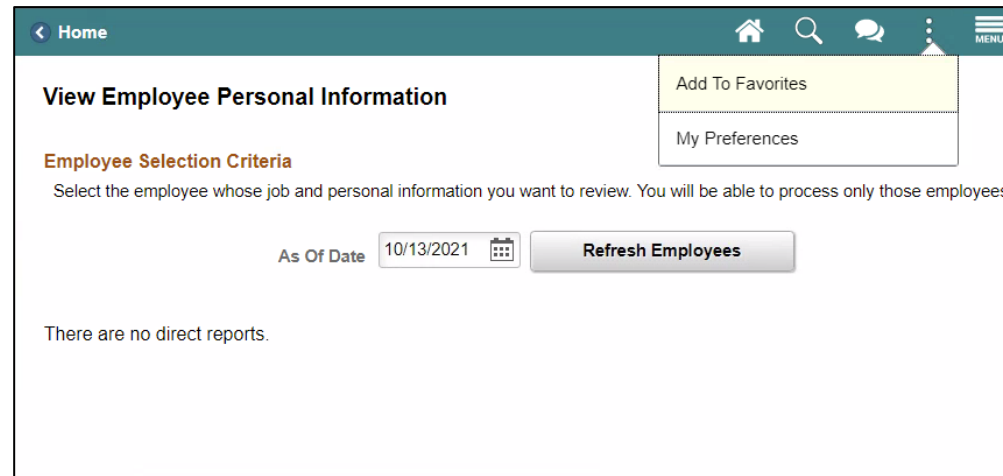


# Lesson 2: Setting up INFORMS for Your Work

- How to add Favorites

# Lecture 1: How to Add Favorites

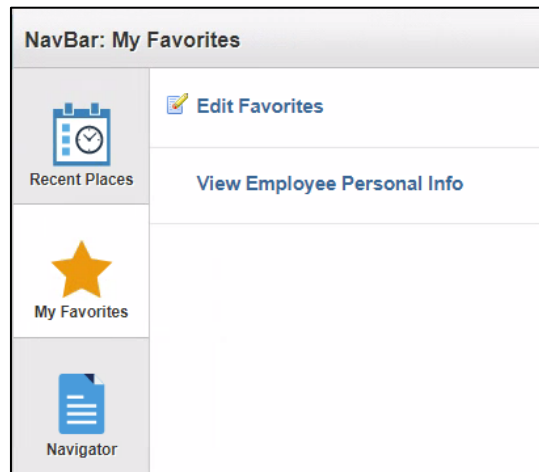
Users can add favorites to their Navigation Bar for easy access to content and components that are often used.





# Lecture 1: How to Add Favorites, Continued

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



# Lesson 3: Entering and Finding Data in INFORMS

- How to Find Data
- How to Enter Data

# Lesson 3: Key Terms

Term	Definition
<b>Component</b>	An INFORMS Component is a collection of pages which are logically grouped
<b>Wildcards</b>	Three 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.

# Lecture 1: How to Find Data

The Component Search page usually has 2 modes:

1. **Basic search** enables users to search by just one field at a time, and then only using the “begins with” operator.
2. **Advanced Search** can further narrow a search, by searching on multiple fields simultaneously and by using a variety of search operators.

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](#)

This search definition must be indexed in order to use Keyword Search

▼ **Search Criteria**

Keywords

**Search** [Basic Search](#) [Advanced Search](#)

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

**Record Administrative Actions**

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

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID  begins with

First Name  begins with

Last Name  begins with

Payroll Status  =

Employee Classification  begins with

Employee Type  =

Business Unit  begins with CR

Supervisor ID  begins with

Job Title  begins with

Case Sensitive

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

# Lecture 1: How to Find Data, Continued

**Operators:** When performing an advanced search, users can use a variety of operators to narrow searches.

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

# Lecture 1: How to Find Data, Continued

**Wildcards:** INFORMS applications support three wildcard characters to help users search for data in character fields.

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.

# Lecture 2: How to Enter Data

- **Edit Box:** Move to and highlight an edit box by pressing the tab key or by double-searching and highlighting the text.



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



- **Drop-Down List Boxes:** Use to select a single item from the list.



# Lecture 2: How to Enter Data, Continued

- **Look up Prompt** 🔍 : Some edit box fields are linked to database prompt tables, which store values for information.
- **Calendar** 📅 : When entering information in a date field, users can select the calendar prompt button.
- **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.

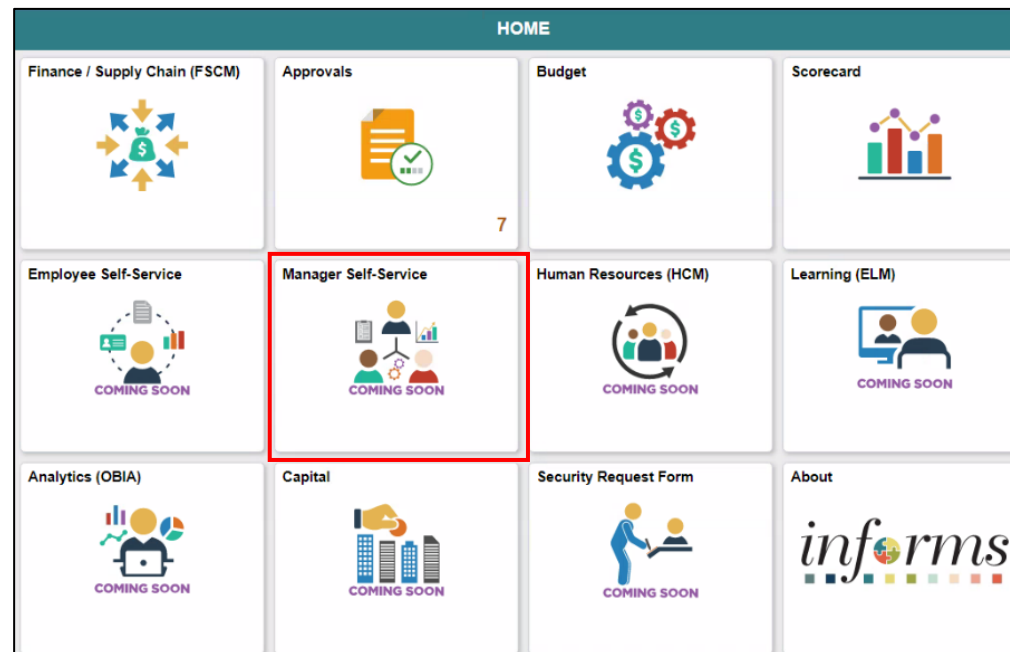


# Lesson 4: INFORMS Approvals

- INFORMS Approval Process

# Lecture 1: INFORMS Approval Process

- 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.



# Lecture 1: INFORMS Approval Process, Continued

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

The screenshot displays the 'Pending Approvals' section of a software interface. On the left, there is a sidebar with a 'View By' dropdown set to 'Type'. Below this, three filter options are listed: 'All' (7 items), 'Absence Request' (1 item), and 'Reported Time Reported' (6 items). The main area shows a list of 7 rows of pending approvals. Each row includes a category, a description of the approval, the dates for the reported time, and the current status (all are 'Routed').

Category	Description	Reported Time	Status
All	Quantity for Approval 8.00 Hours	03/01/2021 - 03/01/2021	Routed
All	Quantity for Approval 80.00 Hours	01/11/2021 - 01/22/2021	Routed
All	Quantity for Approval 8.00 Hours	03/18/2021 - 03/18/2021	Routed
Absence Request	Holiday Family, 8 Hours - ELIGIBLE	04/02/2021	Routed
Reported Time	Quantity for Approval 1.00 Hours	10/11/2021 - 10/11/2021	Routed
Reported Time	Quantity for Approval 1.00 Hours	10/18/2021 - 10/18/2021	Routed
Reported Time	Quantity for Approval 1.00 Hours	10/18/2021 - 10/18/2021	Routed

# Lecture 1: INFORMS Approval Process, Continued

Select one of the tasks to see additional details.

The screenshot displays the 'Reported Time' mobile application interface. At the top, there is a teal header with the title 'Reported Time' and navigation icons. Below the header, the user's name 'Marina Manager 2' is shown, along with 'Approve' and 'Deny' buttons. A notification states '1 line(s) are pending your approval' and 'In Process'. The 'Summary' section provides the following data:

- Time Period: 03/01/2021 - 03/01/2021
- Quantity for Approval: 8.00 Hours
- Quantity Submitted/ Approved: 0.00 Hours
- Quantity Denied: 0.00 Hours
- Quantity Scheduled: 8.00 Hours
- Quantity Reported: 8.00 Hours

Below the summary, there is a 'View Legend' link and a 'Reported Time Details' section with a 'Pending' filter selected. A table shows one row of data:

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

At the bottom, there is an 'Approver Comments' text area and an 'Approval Chain' link.

# Lecture 1: INFORMS Approval Process, Continued

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

## Approval Chain

By PosnSupervisor

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

Route to PosnSupervisor

 Pending +

[Sheerly Moya](#)  
TLByPosnSupervisor >

# Module 2: INFORMS Navigation Summary

## Module Topics

Module Introduction

Lesson 1: Logging in to and Navigating INFORMS

Lesson 2: Setting up INFORMS for Your Work

Lesson 3: Entering and Finding Data in INFORMS

Lesson 4: INFORMS Approvals

# Module 3: INFORMS User Productivity Kit (UPK)

## Module Topics

Module Introduction

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

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

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



# Lesson 1: Key Terms




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.

# Lecture 1: 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.

# Lecture 2: 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.

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

- ***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. The user is prompted for mouse clicks and/or keystrokes to complete the task.

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

- ***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 are scored on how accurately they complete them.
- ***Print It! mode*** enables users to display linked documentation in the form of a Job Aid or System Process Document.

# Course Content Summary

You now understand:

- Log in to and navigate in INFORMS
- Set up INFORMS for their work
- Enter and find data in INFORMS
- Perform approvals in INFORMS
- Access User Productivity Kits (UPKs) and use the UPK Player

# Additional Training and Job Aids

- Users also have the following resources available:

## **Student Guide**

- INFORMS Navigation and Online Help

## **User Productivity Kits**

- INFORMS Navigation and Online Help

For additional information, be sure to visit:

- [www.miamidade.gov/informs](http://www.miamidade.gov/informs)



**CONGRATULATIONS**

Congratulations on successfully completing the *INFORMS Navigation and Online Help* course!

**ERP 102 – INFORMS Navigation and Online Help**