

Course ID: ERP 102

Course: INFORMS Navigation, Reporting, and  
Online Help

# Ground Rules



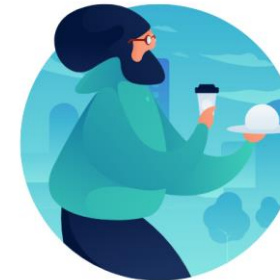
Be on time



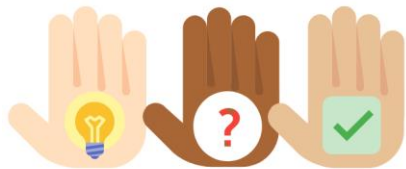
Attendance



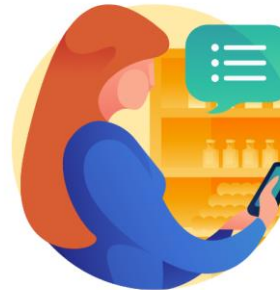
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

# Course Overview

<b>Course Description</b>	<p>This course provides a comprehensive review of the INFORMS Navigation, Reporting, 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 Reporting</li><li>• Module 4: INFORMS User Productivity Kit (UPK)</li><li>• Module 5: Course Summary</li></ul>
<b>Training Audiences</b>	<ul style="list-style-type: none"><li>• All INFORMS End Users</li></ul>
<b>Prerequisites</b>	<ul style="list-style-type: none"><li>• None</li></ul>
<b>Estimated Duration</b>	<ul style="list-style-type: none"><li>• 2 Hours</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

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# Course Outline

## Content

- Lesson 2 Setting up INFORMS for Your Work
  - Lecture 1: How to Add Favorites
  - Lecture 2: Using WorkCenters
- 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

## Content

### Module 3: INFORMS Reporting

- Lesson 1 How to run Reports in INFORMS
  - Lecture 1: How to run reports in INFORMS
  - Lecture 2: How to use the Report Manager
- Lesson 2 How to run Queries in INFORMS
  - Lecture 1. The basics of Query Reporting
  - Lecture 2. How to run a pre-defined Query
- Lesson 3 INFORMS BI Publisher Reporting
  - Lecture 1: Run BI Publisher Reports
- Lesson 4 Pivot Grid
  - Lecture 1: Run Pivot Grid Reports

# Course Outline

## Content

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

- Lesson 1: INFROMS 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 5: 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



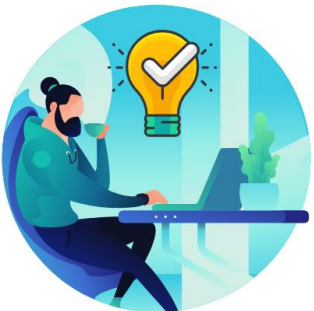
Please turn off your cell phones and refrain from checking email and the Internet while in class



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
- Using WorkCenters

# Learning Objectives

- Entering and Finding Data in INFORMS
- INFORMS approval process
- Running reports in INFORMS
- Using the Report Manager
- Know the basics of Query Reporting
- Running a pre-defined Query
- Running a BI Publisher Report
- Running a Pivot Grid Report
- How to access the User Productivity Kit (UPK) for Online Help
- How to Use the UPK Player

# Roles and Responsibilities

- All roles are required to take the ERP 102 – INFORMS Navigation, Reporting and Online Help course prior to taking subsequent courses.

# 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

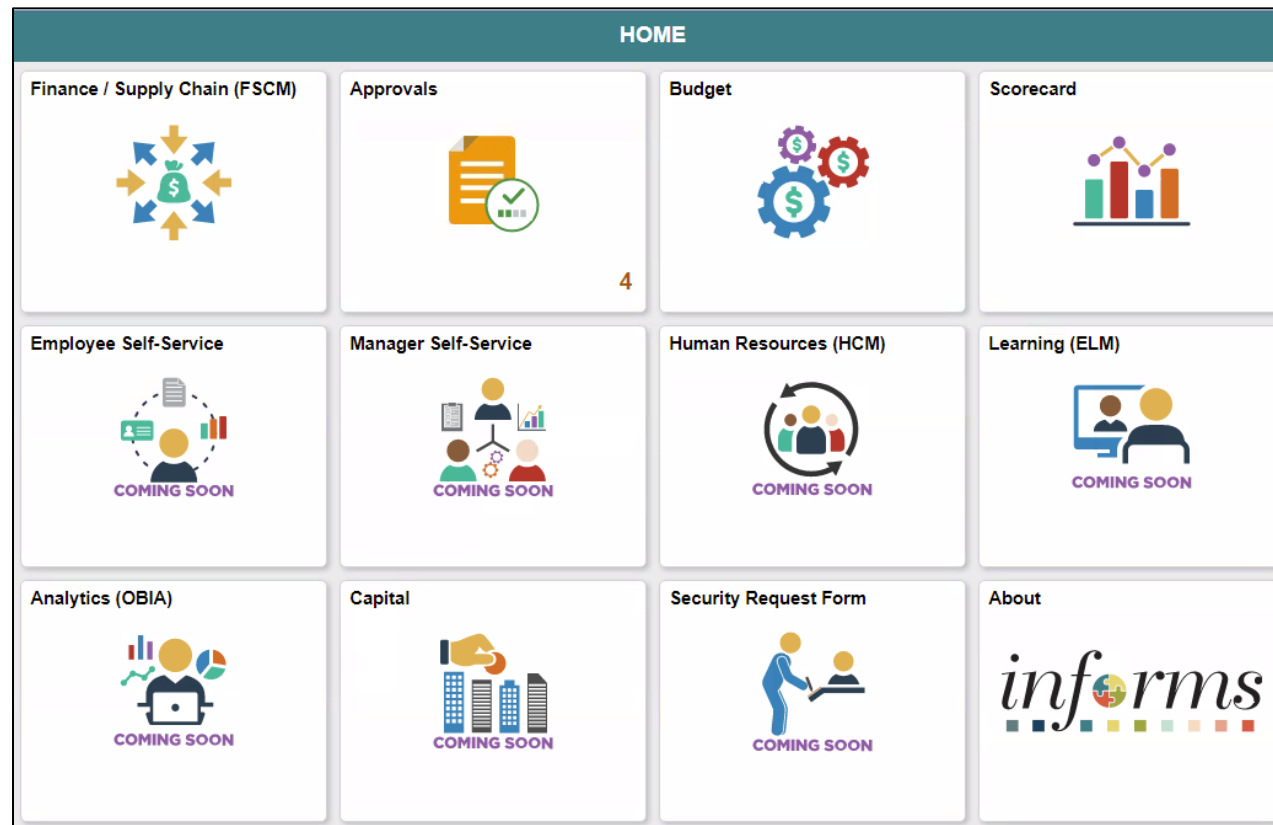
Term	Definition
<b>Dashboard</b>	The home page for the INFORMS application that displays a main menu for easy navigation. The Dashboard lays out links, and includes a favorites bar for frequently visited content. There are also header links for quick customization. The Dashboard can only be accessed 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 user 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.

# Lecture 1: Logging in to INFORMS

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
	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, 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.
	Homepage Tiles. Tiles allow users a quick way to perform routine tasks, such as decision making or monitoring. Tiles give users direct access to targeted transactions.

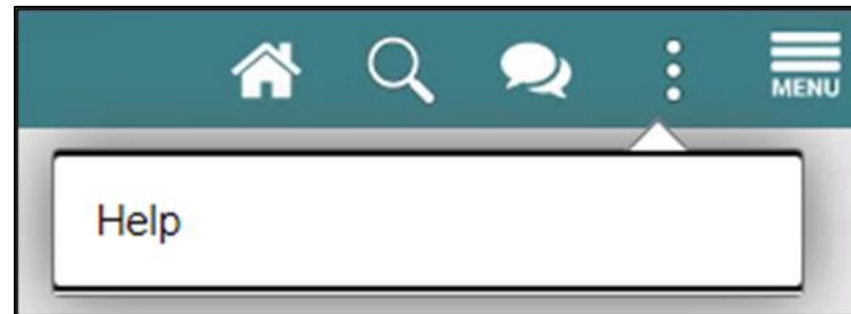
# Lecture 3: Key Elements of Tiles

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



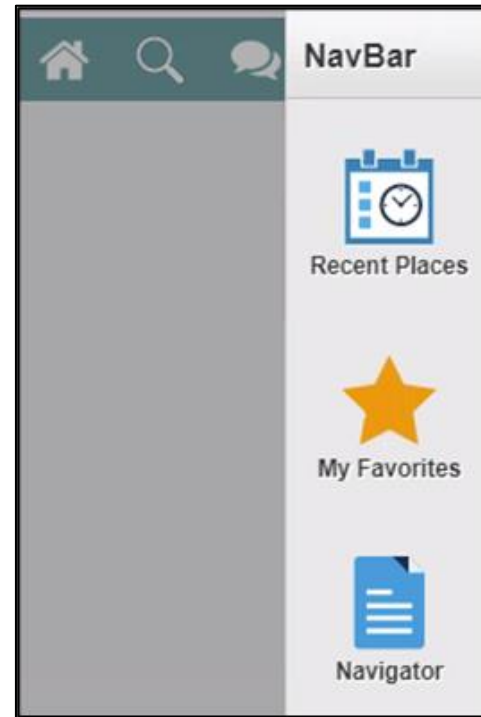
# Lecture 4: Using the Action Menu

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.



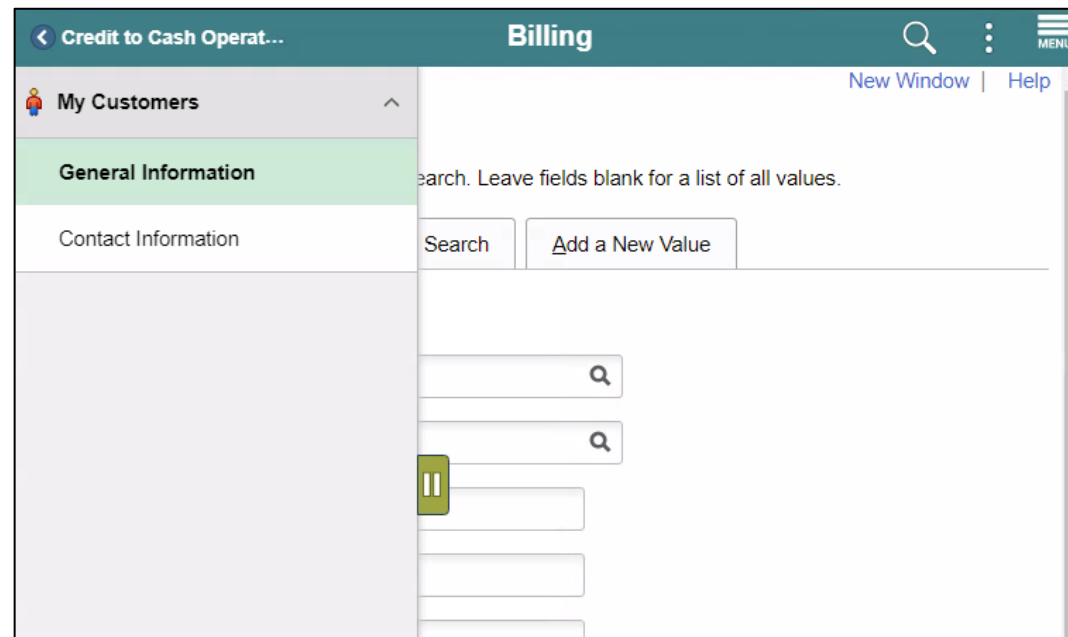
# Lecture 5: How to Use the Navigation Bar

Icon	Description
	<b>Personalize NavBar.</b> use to add or remove Tiles to the NavBar. These are NavBar Tiles, whereas those appearing on the homepage are homepage Tiles.
 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.



# 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
- Using WorkCenters

# Lesson 2: Key Terms

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.

# 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

**Credit to Cash Operations** **Billing**

**My Customers**

**General Information**

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

Customer ID begins with

Name 1 begins with

Name 2 begins with

Telephone begins with

City begins with

State begins with

Postal Code begins with

**Add to Favorites**

**Add To Favorites**

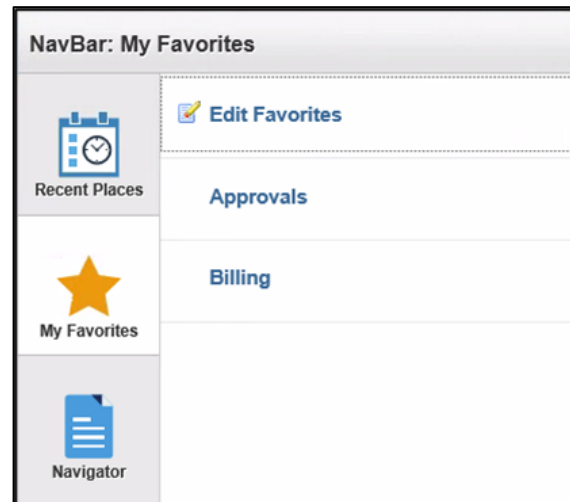
**\*Favorite Label**

Billing

**Add**

# Lecture 1: How to Add Favorites

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



# Lecture 2: Using WorkCenters

**WorkCenters** are designed for specific roles and provide a central area for users to access key components within Financial and Supply Chain applications.



The screenshot displays the 'Accounts Payable WorkCenter' interface. On the left is a navigation menu with categories like 'My Work', 'Vouchers', 'Payments', 'Suppliers', 'Links', 'Queries', 'Public', 'Pivot Grids', and 'Reports/Processes'. The main area is titled 'Paycycle Manager' and contains a 'Paycycle Manager List' table. The table has 7 columns: Pay Cycle, Description, Payment Run Status, Pay From Date, Pay Through Date, Created On, and Created By. It lists 5 rows of data for various pay cycles including ACH, CHK, SSC, and Express Checks.

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

# Lesson 3: Entering and Finding Data in INFORMS

- How to Find Data
- How to Enter Data

# Lesson 3: Key Terms

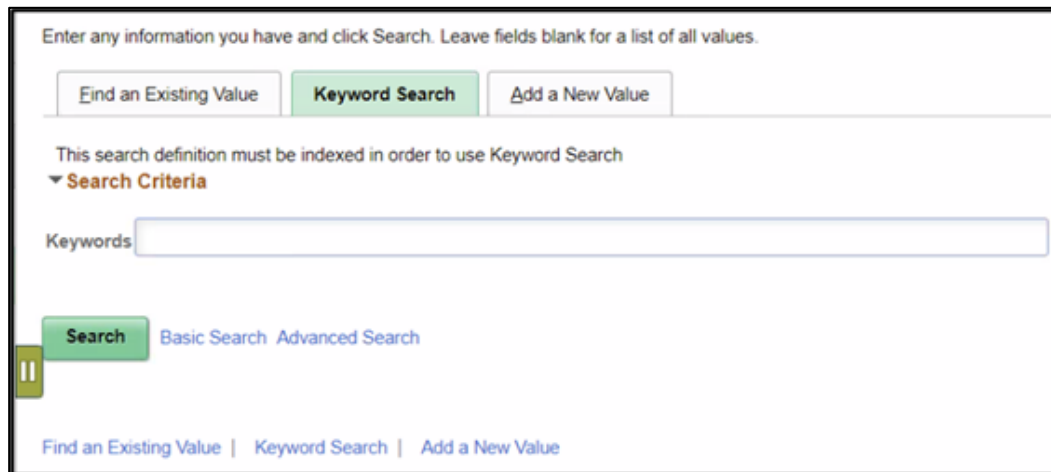
Term	Definition
<b>Component</b>	An INFORMS Component is a collection of pages which are logically grouped.
<b>Wildcards</b>	Characters that assist with the search function. The three wildcards are the percent sign (%), which directs the search function to match one or more characters in the search box; 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](#)

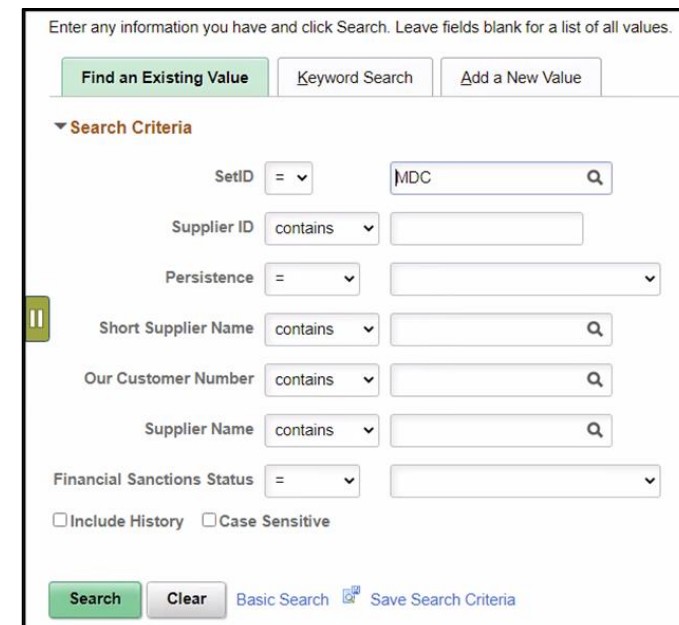
This search definition must be indexed in order to use Keyword Search

▼ **Search Criteria**

Keywords

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

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



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](#)

# Lecture 1: How to Find Data

**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

**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



Title:

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



Description:

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



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

# Lecture 2: How to Enter Data

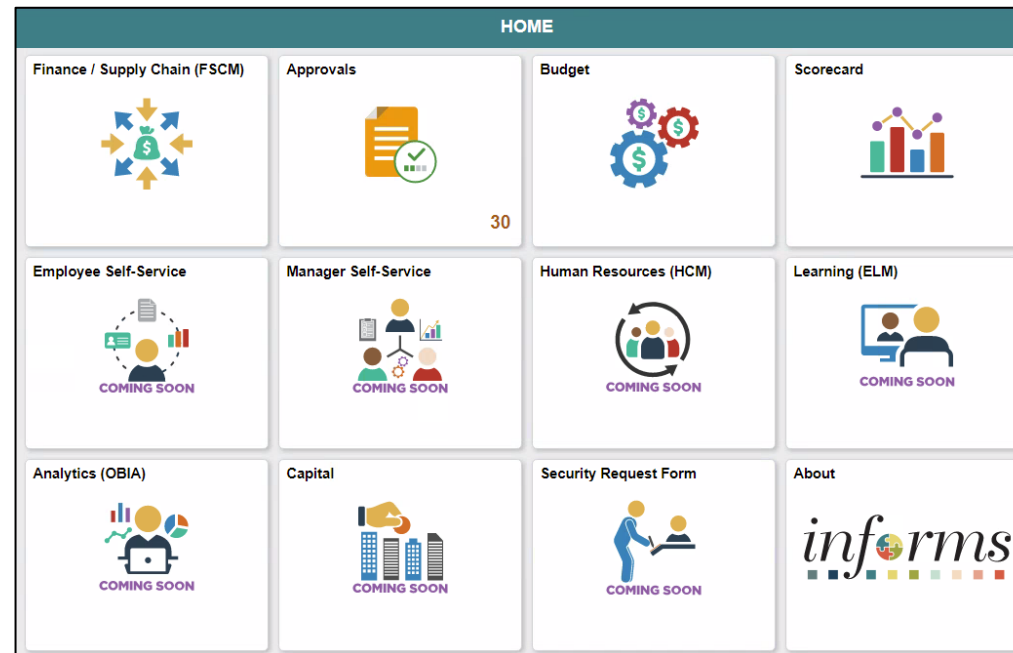
- **Look up Prompt** 🔍 : Some edit box fields are linked to database prompt tables, which store values for information
- **Calendar** 📅 : When entering information in a date field, users can select the calendar prompt button
- **Radio Buttons** ⚪ and **Checkboxes** ☑️ : Radio buttons correspond to data users have

# Lesson 4: INFORMS Approvals

- INFORMS Approval Process

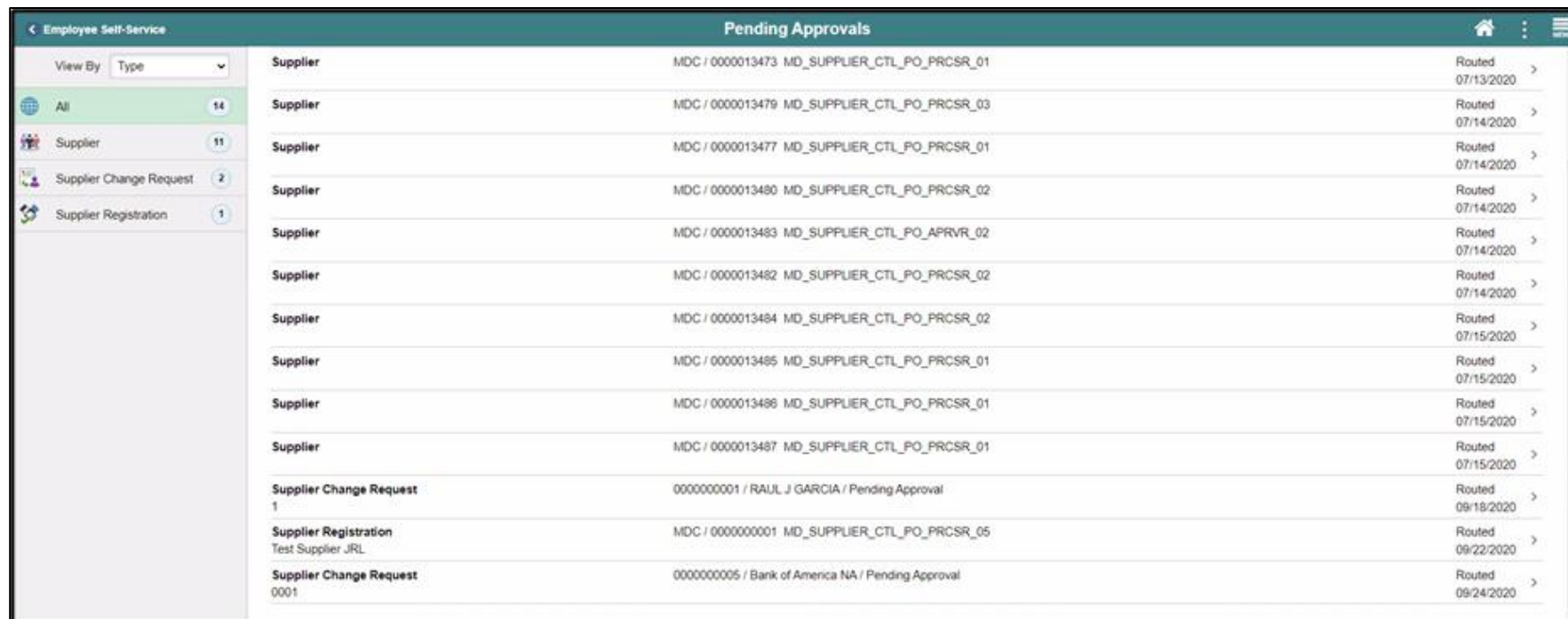
# Lecture 1: INFORMS Approval Process

- 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

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



Employee Self-Service		Pending Approvals	
View By: Type		Supplier	MDC / 0000013473 MD_SUPPLIER_CTL_PO_PRCR_01
All 14		Supplier	MDC / 0000013479 MD_SUPPLIER_CTL_PO_PRCR_03
Supplier 11		Supplier	MDC / 0000013477 MD_SUPPLIER_CTL_PO_PRCR_01
Supplier Change Request 2		Supplier	MDC / 0000013480 MD_SUPPLIER_CTL_PO_PRCR_02
Supplier Registration 1		Supplier	MDC / 0000013483 MD_SUPPLIER_CTL_PO_PRCR_02
		Supplier	MDC / 0000013482 MD_SUPPLIER_CTL_PO_PRCR_02
		Supplier	MDC / 0000013484 MD_SUPPLIER_CTL_PO_PRCR_02
		Supplier	MDC / 0000013485 MD_SUPPLIER_CTL_PO_PRCR_01
		Supplier	MDC / 0000013486 MD_SUPPLIER_CTL_PO_PRCR_01
		Supplier	MDC / 0000013487 MD_SUPPLIER_CTL_PO_PRCR_01
		Supplier Change Request 1	0000000001 / RAUL J GARCIA / Pending Approval
		Supplier Registration Test Supplier JRL	MDC / 0000000001 MD_SUPPLIER_CTL_PO_PRCR_05
		Supplier Change Request 0001	0000000005 / Bank of America NA / Pending Approval



# Lecture 1: INFORMS Approval Process

Select one of the tasks to see additional details.

MDC: 0000013471

Supplier Name: 11 XYZ Construction

ApproveDenyHold

Summary

Persistence: Regular

Classification: C Corp

Withholding: Y

VAT: N

Default Location: 1 Main

Open For Ordering: Y

Remit Supplier: 0000013471

Last modified date: 07/12/20 - 8:38 PM

Last Modified By: MD\_SUPPLIER\_CTL\_PO\_PRCR\_07

Supplier Location

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

Supplier Address

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

More Information

View Attachments (1) >

Approver Comments

Approval Chain >

# Lecture 1: INFORMS Approval Process

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

**Approval Chain** [X]

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 >

# 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 Reporting

## Module Topics

Module Introduction

Lesson 1: How to run reports in INFORMS

Lesson 2: How to run Queries in INFORMS

Lesson 3: INFORMS BI Publisher Reporting

Lesson 4: Pivot Grid

# Lesson 1: How to run reports in INFORMS

- Run reports in INFORMS
- Use the Report Manager

# Lesson 1: Key Terms

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 user 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 user runs a report, they create and save a run control with those settings. The next time they run the report, they select the run control, and the system fills in the settings.

# Lecture 1: How to run reports in INFORMS

There are two ways to run reports in INFORMS:

1. Process Scheduler Reporting
2. Reporting Tools

# Lecture 2: How to Run Reports in INFORMS

**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

Run Control ID

Statements Parameters

Currency to Convert

Run Control ID Statement  
Language English

Report Request Parameters

As of Date 10/02/2020  ☐ Use System Date

Unit AD  Animal Services

SetID MDC  Miami Dade County

Customer

Correspondence Customer

Statement Group All Statement Groups

Balance Forward Due Date 10/02/2020

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



# Lecture 2: How to use the Report Manager

The **Report Manager** is part of the INFORMS Process Scheduler and provides a framework for viewing report output based on the user's privileges.

The screenshot displays the 'Report Manager' interface. At the top, there are four tabs: 'List' (selected), 'Explorer', 'Administration', and 'Archives'. Below the tabs, the 'View Reports For' section contains filters: 'Folder' (set to 'General'), 'Instance' (empty), 'to' (empty), a 'Refresh' button, 'Name' (empty), 'Created On' (empty), 'Last' (selected), '1' (days), and 'Days' (dropdown). Below this is the 'Reports' section, which includes a search icon, a list icon, and pagination controls showing '1-1 of 1' and a 'View All' link. A table with the following columns is shown: 'Report', 'Report Description', 'Folder Name', 'Completion Date/Time', 'Report ID', and 'Process Instance'. The table contains one row with the value '1 Report' in the 'Report' column. At the bottom left, there is a 'Save' button.

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

# Lesson 2: How to run Queries in INFORMS

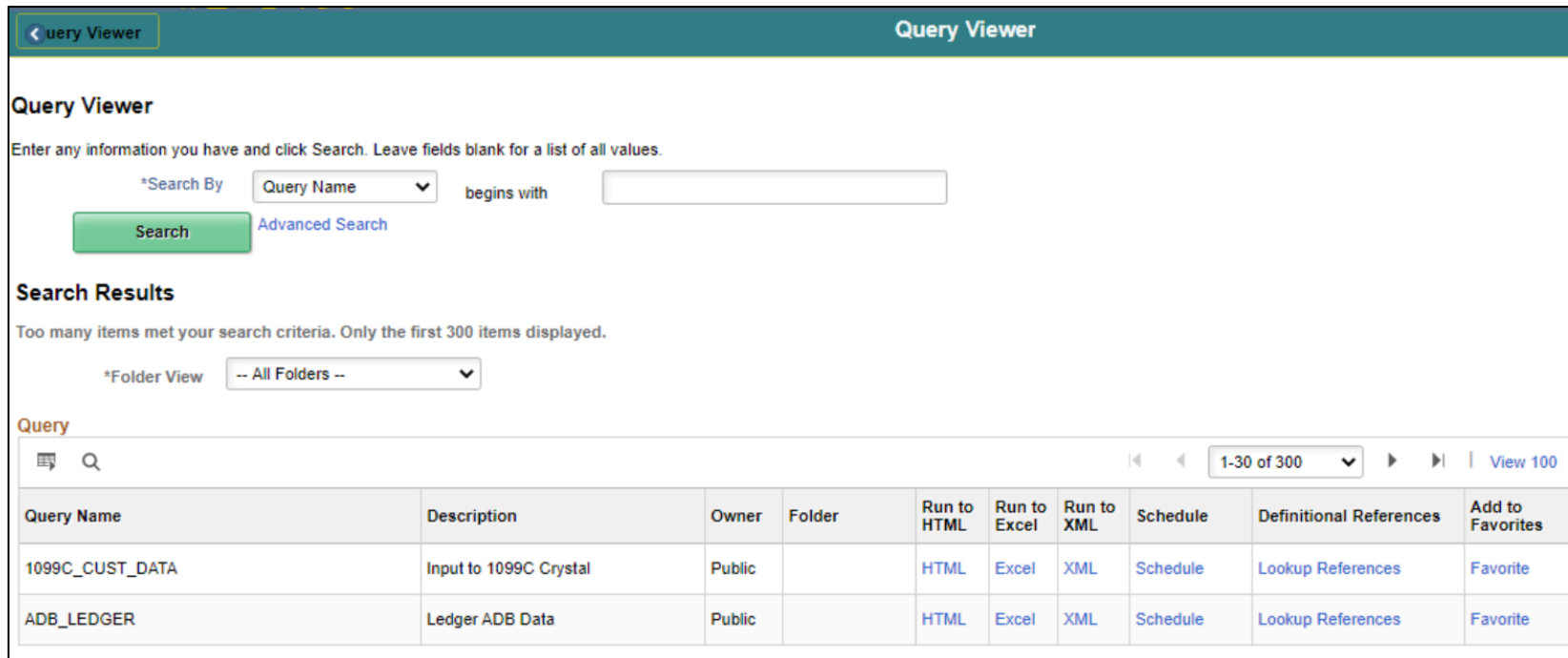
- Know the basics of Query Reporting
- Run a pre-defined Query

# Lesson 2: Key Terms

Term	Definition
<b>INFORMS Inquiry</b>	INFORMS pages within each module allow the user 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 user 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.

# Lecture 1: The Basics of Query Reporting

**INFORMS Query** is an end-user's 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 SQL statements.



The screenshot displays the 'Query Viewer' interface. At the top, there's a teal header bar with a back arrow and the text 'Query Viewer'. Below this, the main area is titled 'Query Viewer' and contains instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two search input fields: '\*Search By' with a dropdown menu set to 'Query Name', and 'begins with' with a text input field. A green 'Search' button and a blue 'Advanced Search' link are positioned below the search fields. The 'Search Results' section follows, with a message: 'Too many items met your search criteria. Only the first 300 items displayed.' Below this is a '\*Folder View' dropdown menu set to '-- All Folders --'. The 'Query' section at the bottom features a table with search results. The table has columns for 'Query Name', 'Description', 'Owner', 'Folder', 'Run to HTML', 'Run to Excel', 'Run to XML', 'Schedule', 'Definitional References', and 'Add to Favorites'. Two queries are listed: '1099C\_CUST\_DATA' and 'ADB\_LEDGER'. The table also includes pagination controls at the top right showing '1-30 of 300' and a 'View 100' link.

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>

# Lecture 2: How to run a pre-defined Query

The **Query Viewer Search Results** page can be found by going to the NavBar, searching on Navigator, navigating to Reporting tools, the Query, then the Query Viewer.

Query Viewer

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

MDC\_CA\_INQ\_PROT

Search

Advanced Search

Search Results

\*Folder View

-- All Folders --

Query

1-1 of 1

View All

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

# Lesson 3: INFORMS BI Publisher Reporting

- Run Business Intelligence (BI) Publisher Reports

# Lesson 3: Key Terms

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

# Lecture 1: Run Business Intelligence Reports

Like the Query Viewer, BI Publisher has a report view page called the Query Report Viewer

[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   
 [Advanced Search](#)

**Search Results** [Show Template Prompts](#)

Report Definition						
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 4: Pivot Grid

## Run Pivot Grid Reports



# Lesson 4: Key Terms

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.

# Lecture 1: Run Pivot Grid Reports

**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

### Pivot Grid Viewer

Search Pivot Grids

Pivot Grid Name

MDC\_PROJRES\_PIV\_PRQ

Data Source Name

Data Source Type

☐ Show all Views

Search

1-1 of 1

View All

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

# Module 3: INFORMS Reporting Summary

## Module Topics

Module Introduction

Lesson 1: How to run reports in INFORMS

Lesson 2: How to run Queries in INFORMS

Lesson 3: INFORMS BI Publisher Reporting

Lesson 4: Pivot Grid

# Module 4: INFORMS User Productivity Kit (UPK)

## Module Topics

Module Introduction

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

# 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

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

# Lecture 2: How to use the UPK Player

- ***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.

# Module 4: INFORMS User Productivity Kit (UPK)

## Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

# Module 5: Course Summary

## Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

# Course Content Summary

Congratulations on completing the Overview of INFORMS. 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
- Run and manage reports
- Access User Productivity Kits (UPKs) and use the UPK Player

# Additional Training and Job Aids

- Users also have the following resources available:

## **User Productivity Kits**

- INFORMS Navigation, Reporting and Online Help

For additional information, be sure to visit:

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



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

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