# Miami-Dade County

End-User Training Guide

**Course Code: ERP 101**
**Course Title: Overview of INFORMS**

## Course Overview

**Course Description**

This course provides a comprehensive review of the Overview of INFORMS processes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Overview of INFORMS
  - INFORMS Project Overview, Objectives and Goals
  - Journey through the INFORMS Project
  - The differences between INFORMS Roles vs Jobs
  - INFORMS Project Training Overview
- Module 3: Course Summary

**Training Audiences**

The following audience(s), are required to complete this course before being granted related system access:

- All INFORMS Users

**Prerequisites**

Participants are required to complete the following End-User 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 30 Minutes.

## Table of Contents

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## Module 1: Course Introduction

Topics

INFORMS Rollout 2 Human Capital Management (HCM) will involve replacing the County's Administrative systems, **most Human Resources systems, Time & Leave and Payroll applications**, The project will use various Oracle ERP software products, including PeopleSoft v9.2.

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives

## Module 1: Course Introduction

Course
Administration
and Logistics

The audience for this course:

- All INFORMS users

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, users will be able to:

- Understand the INFORMS Overview, Objectives, and Goals
- Understand the Journey through the INFORMS Project
- Understand the INFORMS Roles vs Jobs
- Understand the INFORMS Training Overview

## Module 2: Overview of INFORMS

Lessons

This module includes the following lessons:

- INFORMS Overview, Objectives, and Goals
- Journey through the INFORMS Project
- Difference between INFORMS Roles vs Jobs
- INFORMS Project Training Overview

## Lesson 1: INFORMS Overview, Objectives, and Goals

Lesson 1: INFORMS Overview, Objectives, and Goals

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

- Understand what INFORMS stands for
- Understand INFORMS Objectives and Goals

INFORMS stands for INtegrated Financial Resources Management System. It's the brand name of the technology that will modernize outdated financial, procurement, budget and human resources operations. The name is fitting because the system will gather the information the County needs to make smart decisions by integrating data from different management systems in one place.

INFORMS provides the basis for continued enhancement and evolution of our County business processes so that the system keeps pace with the many changes that the County will face for years to come. INFORMS will truly inform our decisions.

INFORMS is the name of Miami-Dade County's Enterprise Resources Planning (ERP) project. ERPs streamline and modernize an organization's business processes and technologies, so they operate more efficiently. INFORMS involves replacing the County's Financial and Administrative systems, all Human Resources systems, Time & Leave, and Payroll applications, as well as upgrading Hyperion (Budget Analysis Tool or BAT). The project will use various Oracle ERP software products, including PeopleSoft v9.2.

The business drivers for this project include:

- Business process improvement
- Elimination of paper-based processes
- Simplification of data collection processes and business functions across County departments
- Centralized tracking mechanisms
- Elimination of redundancy – Single System or Record
- Transparency
- Metrics / Analytics
- Automation of manual processes and improvement of existing processes.
- Integration with Other County business systems
- Automated workflow/approvals
- Establish / ensure audit controls
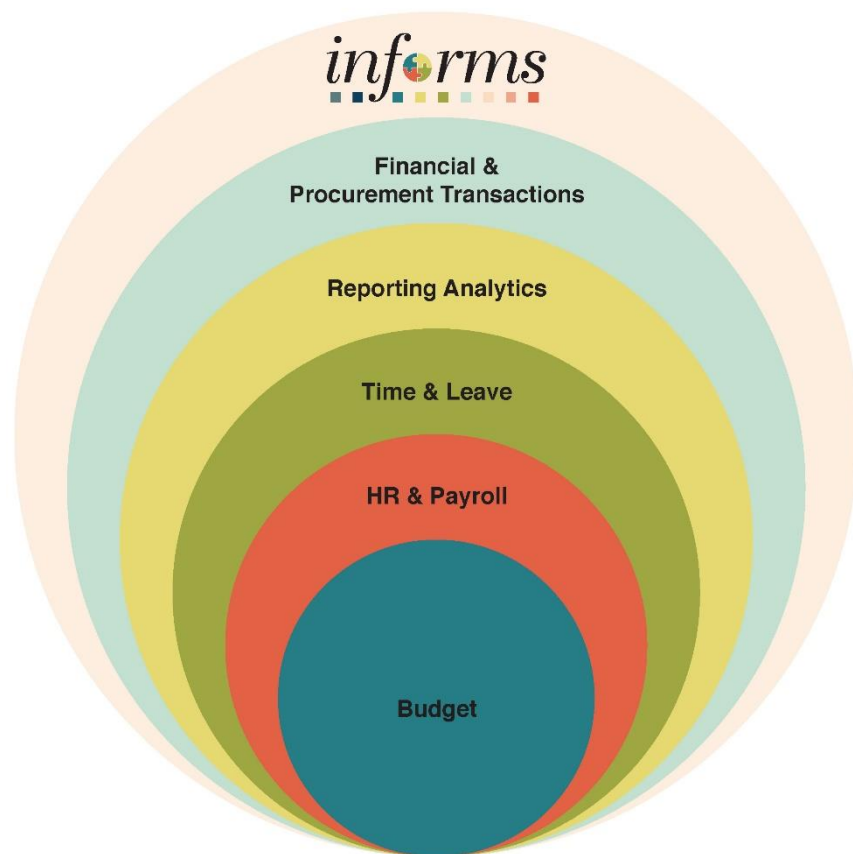
## Lesson 1: INFORMS Overview, Objectives, and Goals

Lesson 1: INFORMS Overview, Objectives, and Goals

The key components of INFORMS include the following:

- Financials and Supply Chain Management
- Human Capital Management
- Enterprise Learning Management
- CBAT Capital Budget
- CBAT Operating Budget and Position/Employee Planning
- Scorecard
- Business Analytics

## Lesson 1: Lesson Summary

Lesson
Summary

Having completed the INFORMS Project Overview, Objectives, and Goals lesson, Users should be able to understand:

- Overview of INFORMS
- Objectives and Goals of INFORMS

| Term | Definition |
|------|-----------|
| **Enterprise Resource Planning (ERP)** | A business process management software that allows an organization to use a system of integrated application to manage business and automate many back-office functions. |
| **Human Capital Management (HCM)** | This is the Human Resources and Payroll functions of INFORMS. |
| **IT Systems** | All electronic data processing, information, recordkeeping, communications, and other computer systems. |
| **Oracle Business Intelligence Analytics (OBIA)** | Data analytics software for dashboards and reports. |
| **PeopleSoft** | ERP software product packages for Finance, Human Capital Management, Supply Chain Management. |
| **Strategic Business Management Division (SBM)** | A division under the Office of Management and Budget. SBM was formed in February of 2020 with the purpose of providing support for INFORMS. |
| **Supply Chain Management (SCM)** | This is the procurement function of INFORMS. |

## Lesson 2: Journey through the INFORMS Project

Lesson 2: Journey Through the INFORMS Project

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

- Understand the Journey through the INFORMS Project

- The County's current HR and Payroll systems, Time and Leave and PeopleSoft 9.1, have reached the end of their useful life. So, the County has acquired and implemented various Oracle ERP software products to enable more efficient business processes. The implementation evaluates current business processes, implements Oracle products with minor customizations, and enables workflows to satisfy the County's business and technical requirements.

INFORMS will become the system of record for Human Resources, Procurement, Finance, Budgeting, and related Reporting for the County. Accenture is the County's implementation partner and manages the development of the Countywide ERP, including implementing the PeopleSoft ERP applications, Hyperion Budgeting applications, and Oracle Analytics applications to satisfy the goals and objectives outlined below. In addition, the County expects new functionality for analytic reporting for both internal and external (transparency) reporting integrating with other County legacy or third-party applications.

- Leverage the County's investment in the Oracle products, with the use of delivered functionality minimizing modifications where possible
- Migrate County Financial (FAMIS), Procurement Systems (ADPICS), Human Resources, Time & Leave and Payroll to the INFORMS platform, including related data conversion
- Develop and implement the Reports, Interfaces, Conversions, Extensions, Forms, and custom Workflows (RICEFW) as defined in the Requirements
- Implement INFORMS through the appropriate business process reviews, testing, documentation, training, knowledge transfer, change control, change management and communications
- Streamline business processes by deploying "best practices" of the latest application release functionality through system integration and capabilities, e.g., automated workflows for automatic notifications and approvals
- Review the existing County Chart of Accounts structure/reporting levels and County data requirements to provide guidance and coordination for migration of the County to a chart of accounts structure that better meets the financial information needs of the County and follows the State of Florida Uniform Chart of Accounts
- Breakdown functional silos to present a unified, easy to use, and standardized set of self-service functionalities to citizens, employees, and vendors
- Replacement of the redundant departmental applications, where applicable

## Lesson 2: Journey through the INFORMS Project

Lesson 2:
Journey
through the
INFORMS
Project

Goals and objectives continued below:

- Review, evaluate, recommend, and implement a Data Warehousing solution for Human Resources, Financials and Supply Chain for best practice management of access and reporting to include a plan for historical County data
- Introduction of innovative and enhanced methods to manage Finance, Office of Management and Budget, Procurement and Human Resources for the County
- Improve departmental integration by reducing paper-based processes, reducing redundancy of data input and retention, and providing unified and integrated access to information for business decisions
- Prepare and assess County staff for the business process change resulting from the implementation of INFORMS
- Train the technical and functional support staff to support the new environment, and document appropriately INFORMS/configuration maintenance areas
- Design a plan for the business process and technology Strategic Business Management (SBM) organization to manage INFORMS activities in the future
- Implement a Professional Change Management Team for ongoing communications with field staff for changes, upgrades, and orientation
- Create a Professional training organization using traditional methods as well as User Productivity Kit (UPK) for ongoing training
- Create a Professional Testing Support Group with a sound methodology and use of automated tools to support Departments in functional testing required after upgrades, patches, and bundles to INFORMS database and application environments
- Perform management and maintenance of the INFORMS, infrastructure, tools, applications, ensuring a best practice approach to maintaining ongoing updates of INFORMS platform and maintenance schedules, i.e., PeopleTools upgrades, tax updates, and application bundles/Images.
- Develop integration with the existing PeopleSoft Financials/Supply Chain systems that support the Aviation Department, Water & Sewer Department and the Public Housing and Community Development Financials to accommodate Countywide reporting and transactions into INFORMS
- Ensure integration with other County's legacy systems as needed
- Improve County's preparedness for a disaster by having the ability for remote access to INFORMS, to complete all critical business transactions on off-site back-ups, and to facilitate disaster recovery by having applications and data in one integrated system
- Review, assess and implement Hyperion application changes based on target ERP platform decisions to ensure best practice, compatibility, and integration (i.e., chart of account, design, position structures, capital integration with INFORMS projects)

## Lesson 2: Journey through the INFORMS Project

Lesson 2: Journey through the INFORMS Project

Goals and objectives continued below:

- Implement Oracle Business Intelligence/Analytics (OBIA) / warehousing to integrate fully with INFORMS; replace ASE scorecard performance measurement functionality utilizing OBIA tools and integrate with INFORMS data once rollouts 1 and 2 are completed
- Plan and design in specifying, procuring, installing, and performing technical configuration of all hardware and software for INFORMS
- Establish a core level of capabilities or "base" implementation that will allow INFORMS placed into a production model without software failure or interruption in the County's business and operational functions
- Implement at the outset a pre-determined essential level of dashboarding, self-service windows and functions, workflows, approval processes, reporting and business intelligence features implemented
- A carefully engineered implementation that focuses on fundamental capabilities that produce the most cost-effective benefits and will allow the County to build on this foundation to enhance functionality, technology, maintenance, and scalability

## Lesson 2: Lesson Summary

Lesson
Summary

Having completed the Journey through the INFORMS Project lesson, users should be able to:

- Understand the Journey through the INFORMS Project

## Lesson 3: Difference between INFORMS Roles vs Jobs

Lesson 3:
Difference
between
INFORMS Roles
vs Jobs

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

- Understand the difference between INFORMS roles vs jobs

## Lesson 3: Difference between INFORMS Roles vs Jobs

Lesson 3:
Difference
between
INFORMS Roles
vs Jobs

Every County employee is assigned a job title and a job position. The job title is the name given to the job position which, describes the roles and responsibilities of the job title.

The job position describes the daily tasks and projects the employee completes as part of their responsibilities. Individuals with the same job title may perform different tasks and have different responsibilities within the County and even the same department.

For example, a HR Analyst works in a department with multiple HR Analysts, but some are responsible for payroll matters while others are responsible for recruitment and ePerformance.

INFORMS access / security roles denote and provide a specific type of access. These roles allow users to perform specific functions or tasks within INFORMS.

County employees are granted INFORMS access / security roles at the discretion of Departmental Leadership's request based on the specific employee's responsibilities, not the employee's job position.

Using the HR Analyst example above, the HR Analyst working with payroll will be given the INFORMS role that provides them access to Payroll functions and NOT recruitment and ePerformance functions. Similarly, the HR Analyst working with recruitment and ePerfomance will NOT be provided the role granting access to payroll functions.

## **Lesson 3: Lesson Summary**

Lesson
Summary

Having completed the Difference between INFORMS Roles and Jobs lesson, users should be able to:

- Understand the difference between INFORMS roles vs jobs

## Lesson 4: INFORMS Project Training Overview

Lesson 4:
INFORMS
Project Training
Overview

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

- Understand all INFORMS Training Courses

Training plays a critical part in equipping users with the knowledge and skills needed to perform business functions using INFORMS. During INFORMS training, users will gain the knowledge and skills necessary to perform their jobs successfully in the new system. Effective training lays the foundation for a successful implementation of INFORMS. All users impacted by INFORMS must have the knowledge, skills, and abilities to perform their new roles effectively. To complete transactions accurately in INFORMS, users must also understand the business processes underlying those transactions.

- Training Courses: Users will learn about the new INFORMS system as it pertains to their role and responsibilities. Courses will be assigned to users based on their role assignment in INFORMS. This approach minimizes the time spent in the classroom and uses class time more efficiently. Users will find classes more focused and relevant to their daily jobs
- Training Resources: The INFORMS Project has made a wide variety of training resources available outside the classroom. Examples of training material include Student Guides, PowerPoint Presentations, recordings of virtual training sessions and User Productivity Kits (UPKs). These resources are located on the [INFORMS Training website](#)
  - o Additional resources are available:
    - **Reach out to your Department Personnel Representative (DPR)** if you have HR related questions.
    - **Call ITD Service Desk (305)596-HELP (4357) or submit an online ticket with myIT** if you have technology issues, for example you are unable to access the system, receive system errors, etc. To submit online ticket with myIT, use one of the following links:
      - [Miami Dade County MyIT](#)
      - [Miami Dade Police Department MyIT](#)
      - [Outside of Miami Dade County Network](#)
- Below are the Training Courses offered for the Human Capital Management areas. The Training Courses for other areas will become available as we approach the deployments of the respective areas

## Lesson 4: Lesson Summary

Lesson Summary

| Course ID | Course Name | Description |
|---|---|---|
| ERP 101 | Overview of INFORMS | This course introduces the INFORMS Project, covering Project Objectives, Goals, Training and Post Go-Live Support. |
| ERP 102 | INFORMS Navigation, and Online Help | This course provides an overview of INFORMS, including the use of its menus and features for standard navigation within the application. |
| HCM 101 | Human Resources Fundamentals | This course provides a comprehensive review of the HR Fundamentals processes. Topics include Introduction to HR Fundamentals. Additionally, the course explains Roles and Responsibilities, Key Process Changes, Integration Points between HR and Other Modules and HR End-to-End Business Processes. |
| ESS 201 | Employee Self Service - eProfile, ePay, and ePerformance | This course provides step-by-step instructions on how use INFORMS Self-Service functionality to review, edit and manage Employee data online. |
| ESS 202 | Employee Self Service - eBenefits | This course provides a detailed review of submitting life events, adding dependents and enrolling employee's dependents to the different benefit plans. |
| ESS 203 | Employee Self Service - Time Management | This course provides a comprehensive review of the Time Management process. Employee's are responsible for submitting time and absence, viewing time exceptions and understanding the process of leave donations. |

## Lesson 4: INFORMS Project Training Overview

Lesson 4:

INFORMS Project Training Overview

| Course ID | Course Name | Description |
|---|---|---|
| DPR 303 | Departmental HR - Time Management | This course provides a comprehensive review of the Time Management process. Approving an employee's time on behalf of Managers, Approving Absences, understanding and resolving the different severity levels of exceptions, managing work schedules and understanding the reports and queries available. |
| DPR 301 | Departmental HR - ePerformance Management (Employee Performance Evaluation) | This course provides step-by-step instructions on how to support Performance Management activities by performing administrative tasks, completing Employee evaluations and running performance reports. |
| DPR 302 | Departmental HR - Personnel Changes | This course provides a detailed overview of Personnel Changes such as Position Management, job data changes, HR transactions, and reports and queries. |
| DPR 321 | Departmental HR - Recruitment | This course provides a comprehensive review of the Recruitment process including creating a job opening, screening applicants for minimum qualifications and preferences, employment offer and acceptance, preparing for hire, and managing hires. |
| DPR 304 | Departmental HR - Updating Team Information | This course will provide a comprehensive review on recording and managing disciplinary records for employees, recording and submitting retirement, resignations and involuntary separation for employees. |
| MSS 204 | Manager Self Service - Time Management | This course provides a comprehensive review of the Time Management process. Approving an employee's time and absence, managing exceptions, entering time and submitting absences on behalf of an employee and managing work schedules. |

## Lesson 4: INFORMS Project Training Overview

Lesson 4:

INFORMS Project Training Overview

| Course ID | Course Name | Description |
|---|---|---|
| MSS 205 | Manager Self Service - ePerformance Management (Employee Performance Evaluation) | This course will prepare Managers on completing an employee's evaluation through the Team Performance module and will also prepare a manager's Nominee and the evaluation's Reviewer on completing their portions of the employee's evaluation. |
| MSS 206 | Manager Self Service - Updating Team Information | This course will provide a comprehensive review on recording and managing disciplinary records for employees, recording and submitting retirement, resignations and involuntary terminations for employees. This course also includes a review of approving employee's retirement and resignation request. Lastly, a review on requesting a leave and return from leave on behalf of an employee. |
| FIN 213 | Load & Manage Pcard Transactions | This course provides a comprehensive guide on how to Reconcile, and Approve PCard Transactions. |
| FIN 214 | Travel Planning | This course provides a comprehensive review of the Travel Planning processes. |
| FIN 215 | Reimbursement Request | This course provides a comprehensive review of the Reimbursement Request processes. |

## Lesson 4: Lesson Summary

Lesson
Summary

Having completed the INFORMS Project Training Overview lesson, users should be able to:

- Understand all INFORMS Training Courses

## Module 3: Course Summary

Course Summary    The Course Summary module covers three topics:

- Course Content Summary
- Knowledge Check
- Course Evaluation

## Module 3: Course Summary

Lesson Summary

Congratulations! Users have completed the Overview of the INFORMS course. Users now should be able to know and understand:

- INFORMS Overview, Objectives and Goals
- Enterprise Learning Management System
- The journey through INFORMS
- Difference between INFORMS Roles vs Jobs
- INFORMS Training

For more information on INFORMS, please visit www.miamidade.gov/informs

## Reference Material

Reference
Materials

If users have further questions about any of the topics presented in this course, use the following resources:

- Training Resources:
    - o Student Guide
    - o PowerPoint Presentation


For additional Information:

- www.miamidade.gov/informs

# Glossary

Key Terms

The following key terms are used in this course:

| Term | Definition |
|---|---|
| **Enterprise Resource Planning (ERP)** | A business process management software that allows an organization to use a system of integrated application to manage business and automate many back-office functions. |
| **Human Capital Management** | This is the Human Resources and Payroll functions of INFORMS. |
| **IT Systems** | All electronic data processing, information, recordkeeping, communications, and other computer systems. |
| **Oracle Business Intelligence Analytics (OBIA)** | Data analytics software for dashboards and reports. |
| **PeopleSoft** | ERP software product packages for Finance, Human Capital Management, Supply Chain Management. |
| **Strategic Business Management Division (SBM)** | A division under the Office of Management and Budget. SBM was formed in February of 2020 with the purpose of providing support for INFORMS. |
| **Supply Chain Management** | This is the procurement function of INFORMS. |