

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



## Course Overview

Course Description	<p>This course provides a comprehensive review of the Overview of INFORMS 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: Overview of INFORMS</li><li>• Module 3: Course Summary</li></ul>
Training Audiences	<p>The following audience(s), are required to complete this course before being granted related system access:</p> <ul style="list-style-type: none"><li>• All INFORMS Users</li></ul>
Prerequisites	<p>Participants are required to complete the following End-User Training courses before starting this course:</p> <ul style="list-style-type: none"><li>• None</li></ul>
Delivery Method	<p>This course is intended to be delivered through Instructor-led Training.</p>
Estimated Duration	<p>The total duration of this course, when delivered through Instructor-led Training is 1 hour.</p>

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## Module 1: Course Introduction

### Topics

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, you will be able to:

- Understand the INFORMS Overview, Objectives, and Goals
- Understand the Journey through the INFORMS Project
- Understand the INFORMS Training Overview
- Understand the Post Go-Live Support (Strategic Business Management)

## Module 2: Overview of INFORMS

### Lessons

This module includes the following lessons:

- INFORMS Overview, Objectives, and Goals
- Journey through INFORMS
- INFORMS Training Overview
- Post Go-Live Support (Strategic Business Management)



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

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

At the conclusion of this lesson, you 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.

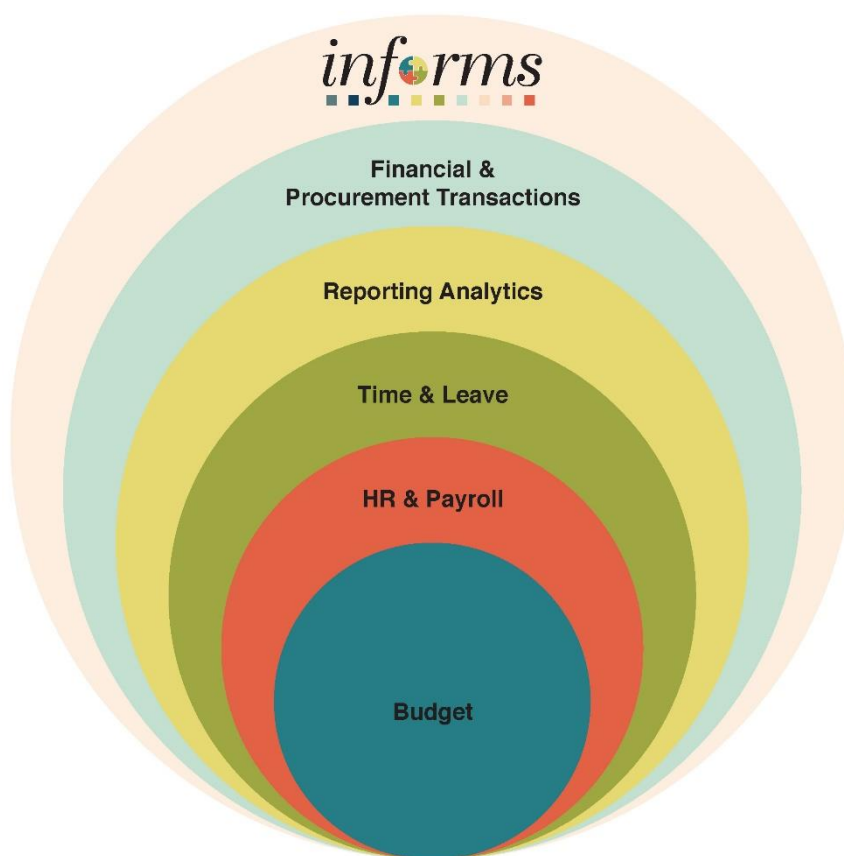
INFORMS is the name of Miami-Dade County's Enterprise Resources Planning (ERP) project. ERPs streamline and modernize an organization's business processes and technologies, so they operate more efficiently. INFORMS involves replacing the County's Financial and Administrative systems, all Human Resources 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

- 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
<b>Enterprise Resource Planning (ERP)</b>	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.
<b>Human Capital Management</b>	This is the Human Resources and Payroll functions of INFORMS.
<b>IT Systems</b>	All electronic data processing, information, recordkeeping, communications, and other computer systems.
<b>Oracle Business Intelligence Analytics (OBIA)</b>	Data analytics software for dashboards and reports.
<b>PeopleSoft</b>	ERP software product packages for Finance, Human Capital Management, Supply Chain Management.
<b>Supply Chain Management</b>	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 financial and administrative systems, FAMIS and ADPICS, 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 Center of Excellence (CoE) 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 3: INFORMS Project Training Overview

### Lesson 3: INFORMS Training Overview

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

- Understand all INFORMS Training Courses

Training plays a critical part in equipping you with the knowledge and skills needed to perform business functions using INFORMS. During INFORMS training, you will gain the knowledge and skills necessary to perform your 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, you 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.
- Below are the Training Courses offered for the Finance and Supply Chain Management areas. The Training Courses for other areas will become available as we approach the deployments of the respective areas.

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, Reporting, and Online Help	This course provides an overview of INFORMS, including the use of its menus and features for standard navigation within the application. This course also provides an overview of reporting functionality in INFORMS, including standard and customized query capabilities.
FIN 101	Financials Fundamentals	This course provides a general overview of the INFORMS Finance Application. It provides an end-to-end, high-level view of the Finance Application, including its purpose, benefits, and functions. It is a prerequisite to all other FIN courses.

## Lesson 3: INFORMS Project Training Overview

### Lesson 3: Training Curriculum

Course ID	Course Name	Description
FIN 201	Accounts Payables - Create and Process non-PO Vouchers	This course provides an overview and hands-on lessons on payment requests, single payment vouchers and journal vouchers.
FIN 202	Asset Management Accounting	This course provides an overview and hands-on lessons on recording, adjusting, depreciating, processing, maintaining and retiring assets.
FIN 203	Create and Finalize Bills	This course provides an overview and hands-on lessons on processing billing invoices.
FIN 204	Receivables Processing	This course provides an overview and hands-on lessons on entering and maintaining receivables.
FIN 205	Customer Setup, Credit and Collections	This course provides an overview and hands-on lessons regarding customer setup, deposits, cash applications, collections and aging.
FIN 206	Enter and Process Budget Journals (Department)	This course provides an overview and hands-on lessons on entering and processing budget journals.
FIN 207	Manage Budget Exceptions (Department)	This course provides an overview and hands-on lessons on managing budget exceptions.
FIN 208	Budget Inquiry and Reporting	This course provides an overview and hands-on lessons on budget inquiries and reporting.
FIN 209	Create, Maintain, Budget and Capitalize Projects	This course provides an overview and hands-on lessons on creating, maintaining, budgeting for, and capitalizing projects. Advanced project costing topics are also covered, including managing, analyzing and maintaining projects.
FIN 210	Create and Amend Contracts	This course provides an overview and hands-on lessons on creating and amending contracts.



## Lesson 3: INFORMS Project Training Overview

### Lesson 3: Training Curriculum

Course ID	Course Name	Description
FIN 211	Create, Maintain, and Bill Grants	This course provides an overview and hands-on lessons on creating, maintaining, and billing grants.
FIN 212	Accounts Payables-Department Approvals	This course provides an overview and hands-on lessons voucher approvals and PO vouchers.
FIN 301	Managing the General Ledger	This course provides an overview and hands-on lessons on creating and processing Journal entries.
FIN 302	Managing Budgets (Central)	This course provides an overview and hands-on lessons on managing budgets.
FIN 303	Central Supplier Management	This course provides an overview and hands-on lessons on supplier management.

## Lesson 3: INFORMS Project Training Overview

### Lesson 3: Training Curriculum

Course ID	Course Name	Description
SCM 101	Supply Chain Management Fundamentals	This course introduces INFORMS Supply Chain Management. It provides an end-to-end, high-level view of the SCM Application, including its purpose, benefits and functions. It is a prerequisite to all other SCM courses.
SCM 201	Manage and Record Requisitions	This course provides an overview and hands-on lessons on managing and recording requisitions.
SCM 202	Manage, Record and Close Purchase Orders	This course provides an overview and hands-on lessons on managing, recording and closing purchase orders.
SCM 203	Record Receipt of Goods and Services	This course provides an overview and hands-on lessons on recording receipts of goods and services.
SCM 204	Strategic Sourcing (Countywide)	This course provides an overview and hands-on lessons on strategic sourcing, including managing bidders and sourcing.
SCM 205	Departmental Supplier Contract Management	This course provides an overview and hands-on lessons on departmental supplier contract management, including supplier contracts and contract deliverables. Topics such as amending, negotiating, creating, and approving supplier contracts will also be covered.
SCM 206	Grantor Management	This course provides an overview and hands-on lessons on Grantor management, using core supplier contract management functionality.
SCM 301	Central Supplier Contract Management	This course provides an overview and hands-on lessons on Central supplier contract management, including supplier contracts and contract deliverables. Topics such as amending, negotiating, creating and approving supplier contracts will also be covered.

## Lesson 4: Post Go-Live Support (Strategic Business Management)

### Lesson 4: Overview

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

- Understand how to get help with questions or issues using INFORMS
- Understand the roles and responsibilities of the Strategic Business Management Division

As users start using INFORMS for their jobs and encounter questions or issues, the first step is to call the ITD Service Center at **(305) 596-HELP**. For any tickets related to INFORMS that ITD Service Center cannot resolve, they will be escalated to the Strategic Business Management Division (SBM) under the Office of Management and Budget. SBM will work with the appropriate Departments and software vendors to ensure resolution to the tickets.

SBM was formed in February of 2020 with the purpose of providing support for INFORMS. The objectives of SBM are:

- Maintenance, enhancement, release structure and support of the INFORMS technology applications, tools, systems, processes and third party integration systems
- Coordinate continuous improvement of business process, strategic planning, and evolution of INFORMS and related enterprise systems updates
- Develop solutions in conjunction with integrated systems
- Structure of project templates
- Develop and promote analytics associated with INFORMS
- Coordinate change management and reporting on controls established by central departments

## Lesson 4: Post Go-Live Support (Strategic Business Management)

### Lesson 4: SBM Structure, Roles, and Responsibilities

It is important to note that for policy related questions you should continue to reach out to Central Finance, ISD or OMB.

Below are the Role and Responsibilities between SBM and the Departments:

	County Departments	SBM	Central Departments
<b>Configuration Updates</b>	Initiate request to the ITD Service Center	Receive, route/log requests and execute operational and system data request	Review and provide approval for configuration requests
<b>Policy &amp; Procedures</b>	Follow all policies and procedures	Follow and enforce all policies and procedures	Resolve policies and procedures questions. Update policies and procedures, as necessary.
<b>Application Support</b>	Initiate request to the ITD Service Center	Resolve and route/log requests System updates	Help resolve any requests requiring central department input
<b>Security</b>	Initiate request to the ITD Service Center	Receive and route request. Execute approved security changes to roles and users. Periodic review of security role assignments	Review and approve role requests. Approve role creation and segregation of duty modifications
<b>Workflow</b>	Request a re-route for transactions stuck in processing	Obtain approvals and execute changes to existing workflow. Build new approved workflows. Monitor and re-route transactions stuck in processing.	Provide approvals for changes/new workflows
<b>Functional Questions</b>	Initiate functional question to the ITD Service Center	Review, analyze and route questions to Central Departments. Support in answering any technical aspects of solutions for functional questions.	Answer questions routed from COE
<b>Technical Questions / Request</b>	Initiate technical question / requests to the ITD Service Center	Review, analyze, answer and/or build technical answers/solutions Update batch schedule	Provide approvals, review, functional knowledge or testing of technical answers/solutions. Initiate batch requests
<b>Change / Training</b>	Initiate onboarding process Approve employee training requests	Conduct new / transfer employee training. Reinforce / new process training or communications	Provide policy and procedure SME review / approval of training and communications

## Lesson 4: Lesson Summary

### Lesson Summary



Having completed the Post Go-Live Support (Strategic Business Management) lesson, you should be able to:

- Understand how to get help with INFORMS
- Understand the Post Go-Live Support Organization (Strategic Business Management)

## Module 3: Course Summary

### Course Summary



The Course Summary module covers three topics:

- Course Content Summary
- Knowledge Check
- Course Evaluation

## Module 3: Course Summary

### Knowledge Check



1. What does INFORMS stand for?

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2. What systems will INFORMS replace?

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3. What does SBM stand for?

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4. Who do you call when you encounter an error message while using INFORMS?

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## Module 3: Course Summary

### Objectives Achieved



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

- INFORMS Overview, Objectives and Goals
- The journey through INFORMS
- INFORMS Training
- Post Go-Live Support (Strategic Business Management)

For more information on INFORMS, please visit [www.miamidade.gov/informs](http://www.miamidade.gov/informs)