

---

## **End User Training Resource Guide**

**Course Code: ERP 101**

**Course Title: Overview of INFORMS**

***Updated 03-05-2025***

## Guide Overview

### Guide Description

This guide provides a comprehensive Overview of INFORMS processes. Topics include the goals and objectives of INFORMS. Additionally, the guide offers a high-level overview of INFORMS training and support resources.

This guide consists of the following modules:

- Module 1: Introduction
- Module 2: Overview of INFORMS
- Module 3: Guide Summary



Table of Contents	
Content	Page
Module 1: Introduction .....	4
Module 2: Overview of INFORMS.....	12
○ Lesson 1: Development of INFORMS .....	13
○ Lesson 2: INFORMS Training .....	17
○ Lesson 3: INFORMS Support .....	21
Module 3: Guide Summary .....	26

## Module 1: Introduction

### Topics

This module covers the following topics:

- Learning Objectives
- Roles and Responsibilities
- Purpose and Benefits
- INFORMS End-to-End Business Processes
- Purpose, goals, and objectives of INFORMS

## Module 1: Introduction

### Learning Objectives

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

- Understand the purpose and benefits of INFORMS
- Understand the background behind the development of INFORMS
- Understand the INFORMS training framework
- Understand INFORMS Support roles and responsibilities

## Module 1: Introduction

<b>Audience:</b>	The following roles are associated with this topic and will play a part in conducting the related business processes for the County:
<b>Roles and Responsibilities</b>	<ul style="list-style-type: none"><li>• All INFORMS Users</li></ul>

## Module 1: Introduction


### Purpose and Benefits

The purpose and benefits of using INFORMS to administer County business processes include:

- A Single System of Records
- Efficient processes
- Automation of new business processes or systems
- Sustainability via paperless processing
- Self-Service and Manager Self-Service functionalities
- Transparency
- Fosters teamwork and collaboration
- Future adaptability

## Module 1: Introduction

### INFORMS End-to-End Business Processes




## informs Overview

- INFORMS is Miami-Dade County's Enterprise Resources Planning (ERP) System
- INFORMS streamlines our County's business processes and technologies, so they operate more efficiently and support our policies
- INFORMS is the system of record for our Financials, Supply Chain, Human Resources, and Payroll functions
- INFORMS provides modern and efficient Countywide business processes and practices
- INFORMS promotes conservation and better use of our resources (time, human capital, and supplies)

#### Benefits of INFORMS:

- A Single System of Records
- Efficient processes
- Automation of new business processes/systems
- Sustainability/paperless processes
- Self-service/manager self-service
- Transparency
- Foster teamwork and collaboration
- Future adaptability



Financial & Procurement Transactions

Reporting Analytics

Time & Leave

HCM & Payroll

Budget

**INFORMS** stands for **INtegrated Financial Resources Management System**. It's the brand name of the technology used to manage financial, procurement, budget, and human resources operations. The name is fitting because the system gathers information the County needs to make smart decisions using integrated data from different management systems all under one platform.

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 truly *informs* 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. INFORMS replaced the County's former Financial and Administrative systems, all Human Resources systems, Time & Leave and Payroll applications, and integrates with Hyperion, the Budget Analysis Tool (BAT). The project uses various Oracle ERP software products, including PeopleSoft.

Using an ERP system such as INFORMS facilitates centralizing data and increases efficiency, prevents errors, improves security, and streamlines services—allowing for seamless collaboration between business units to serve the public effectively.



## Module 1: Introduction

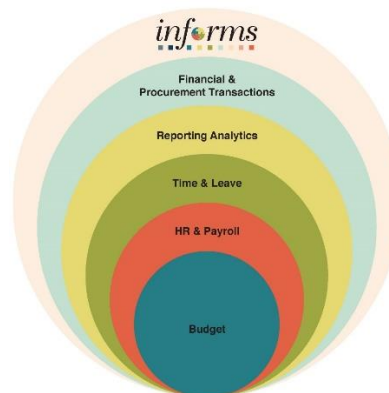
### INFORMS End-to-End Business Processes

#### 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 and Constitutional Offices
- Centralized tracking mechanisms
- Elimination of redundancy – Single System of Record
- Transparency
- Metrics and Analytics
- Automation of manual processes and improvement of existing processes
- Integration with other County business systems
- Automated workflow and approvals
- Establish and ensure audit controls

#### The key components of INFORMS include:

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



## Module 1: Introduction

### Key Terms



The following key terms are used in this guide:

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.

## Module 1: Introduction

### Module 1: Introduction Summary

The following key concepts were covered in this module:

- Learning Objectives
- Roles and Responsibilities
- Purpose and Benefits
- INFORMS End-to-End Business Processes

## Module 2: Overview of INFORMS

### Lessons

This module includes the following lessons:

- Development of INFORMS
- INFORMS Training
- INFORMS Support

## Lesson 1: Development of INFORMS

### Lesson 1: Overview

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

- Understand the background behind the development of INFORMS

## Lesson 1: Development of INFORMS

### Lesson 1: Development of INFORMS

The County replaced outdated financial and administrative systems (FAMIS and ADPICS) with Oracle ERP software to streamline business processes. This integrated system is now known as INFORMS and serves as the official platform for managing areas including Human Resources, Procurement, Finance, Budgeting, and Reporting for the County and Constitutional Offices. The INFORMS Project Team is proud to have successfully implemented improvements in the following areas:

- **System Modernization and Integration**
  - Consolidated financial, procurement, human resources, timekeeping, and payroll processes into one unified platform.
  - Replaced redundant departmental applications to improve efficiency.
  - Integrated existing PeopleSoft Financials/Supply Chain systems for Aviation, Water & Sewer, and Housing Development.
  - Developed self-service functionalities for citizens, employees, and vendors.
  - Enabled remote access to ensure business continuity during crises and disaster recovery scenarios.
- **Process Improvements and Automation**
  - Streamlined business operations using best practices and automation.
  - Reduced paper-based processes and manual data input for better integration.
  - Implemented workflows for automated notifications and approvals.
  - Developed standardized reports, interfaces, and data conversion methods to support business needs.
- **Financial and Data Management**
  - Reviewed and modernized the County's Chart of Accounts to align with state requirements.
  - Introduced a Data Warehousing solution for enhanced reporting and historical data access.
  - Integrated Oracle Business Intelligence and Analytics (OBIA) for performance tracking through the County's Scorecard system.
  - Ensured Hyperion compatibility and integration for financial and budgeting processes.

## Lesson 1: Development of INFORMS

### Lesson 1: Development of INFORMS

- **User Support, Training, and Maintenance**
  - Provided comprehensive training for end users and support staff.
  - Established a Professional Testing Support Group for system updates and patches.
  - Created a Change Management Team for ongoing user communication and system upgrades.
  - Designed a long-term maintenance plan for timely software updates and security enhancements.

INFORMS was carefully designed to be adaptable and scalable, allowing the County to continue evolving its technology infrastructure. This ensures cost-effective innovation and ongoing improvements to better serve the community.

## Lesson 1: Development of INFORMS

### Lesson Summary



Now that you have completed the Development of INFORMS lesson, you should be able to:

- Understand the background behind the development of INFORMS



## Lesson 2: INFORMS Training

### Lesson 2: Overview

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

- Understand the INFORMS training framework

## Lesson 2: INFORMS Training

### Lesson 2: INFORMS Training

Training plays a crucial role in equipping employees with the knowledge and skills needed to perform business functions using INFORMS. Through INFORMS training, participants gain the expertise required to succeed in their roles within the new system.

All individuals impacted by INFORMS must possess the necessary knowledge, skills, and abilities to perform their new roles effectively. Additionally, understanding the underlying business processes is essential for accurately completing transactions within INFORMS.

**Training Courses:** INFORMS training courses are designed to help users understand how the system applies to their specific roles and responsibilities. Courses are assigned based on a user's role within INFORMS, ensuring efficient use of class time. This targeted approach makes the training more relevant and beneficial to daily job functions.

**Training Resources:** In addition to classroom training, the INFORMS Project provides a variety of supplemental training resources to support users outside of formal sessions. The available training resources focus on the **Finance and Supply Chain Management (FSCM)** and **Human Capital Management (HCM)** areas, in addition to **Constitutional Offices (COs)** and **Business Intelligence (BI)**. Additional materials for other areas may be released as business needs arise.

Training Resource Link	Associated IDs	Description
<a href="#">Finance and Supply Chain Management</a>	ERP FIN SCM	A dedicated webpage to review associated training materials for the topics ERP Fundamentals, in addition to Finance and Supply Chain Management (FSCM).
<a href="#">Human Capital Management</a>	ERP ESS MSS DPR	A dedicated webpage to review associated training materials for the topics ERP Fundamentals, Human Capital Management (HCM), and Payroll, including Employee Self-Service (ESS), Manager Self Service (MSS), and Department Personnel Representative (DPR).
<a href="#">Business Intelligence</a>	BI	A dedicated webpage to review associated training materials regarding Oracle Business Intelligence and Analytics (OBIA, also known as BI).
<a href="#">Constitutional Offices</a>	CO FIN SCM	A dedicated webpage to review associated training materials for Constitutional Offices (CO) relevant to the topics FSCM and HCM.

## Lesson 2: INFORMS Training

### Key Terms



The following key terms are used in this lesson:

Term	Definition
<b>Training Courses</b>	Learning sessions designed to help users understand how the system applies to their specific roles and responsibilities.
<b>Training Resources</b>	Supplemental learning tools to support users outside of formal sessions.

## Lesson 2: Lesson Summary

### Lesson Summary

Now that you have completed the INFORMS Training lesson, you should be able to:

- Understand the INFORMS Training framework



## Lesson 3: INFORMS Support

### Lesson 3: Overview

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

- Understand INFORMS Support roles and responsibilities

## Lesson 3: INFORMS Support

### Lesson 3: INFORMS Support

For any questions or user experience issues, the **ITD Service Center at (305) 596-HELP** is available to log initial support requests. INFORM support related tickets that ITD Service Center cannot resolve are escalated to the INFORMS Project Team for resolution.

Below is a summary overview of responsibilities by support category for the roles County Business Units, Constitutional Offices, Central Business Units, and the INFORMS Project Team:

Support Category	County Business Units and Constitutional Offices	INFORMS Project Team	Central Business Units
<b>Configuration Updates</b>	Initiate request to the ITD Service Center	Receive, route, and log requests  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	Review 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  Perform system updates	Help resolve requests requiring central department input
<b>Security</b>	Initiate request to the ITD Service Center	Receive and route requests  Execute approved security changes to roles and users  Conduct periodic review of security role assignments	Review and approve role requests Approve role creation and segregation of duty modifications

## Lesson 3: INFORMS Support

### Lesson 3: INFORMS Support

Support Category	County Business Units and Constitutional Offices	INFORMS Project Team	Central Business Units
<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 new workflows or changes
<b>Functional Questions</b>	Initiate functional question to the ITD Service Center	Review, analyze, and route questions to Central Business Units  Support in answering any technical aspects of solutions for functional questions	Answer questions routed from INFORMS Project Team
<b>Technical Questions / Request</b>	Initiate technical questions or requests to the ITD Service Center	Review, analyze, answer, or build technical answers or solutions  Update batch schedule	Provide approvals, review, and functional knowledge or testing of technical answers or solutions  Initiate batch requests
<b>Change / Training</b>	Initiate onboarding process  Approve employee training requests	Conduct new or transfer employee training  Introduce or reinforce process training or communications	Provide policy and procedure Subject Matter Expert review or approval of training and communications

## Lesson 3: INFORMS Support

### Key Terms



The following key terms are used in this lesson:

Term	Definition
<b>ITD Service Center</b>	Team of Information Technology staff responsible for logging all technical support service tickets, including any INFORMS related requests, questions, or user experience issues.
<b>INFORMS Project Team</b>	Group of subject matter experts tasked with finding resolutions to any INFORMS related tickets regarding requests, questions, or user experience issues received by the ITD Service Center.



## Lesson 3: Lesson Summary

### Lesson Summary

Now that you have completed the INFORMS Support lesson, you should be able to:

- Understand INFORMS Support roles and responsibilities



## Module 3: Guide Summary

**Guide Summary** The Guide Summary module covers two topics:



- Content Summary
- Additional Training and Job Aids

## Module 3: Summary

### Objectives Achieved



You have completed the Overview of INFORMS guide. You now should be able to:

- Explain the purpose, goals, and objectives of INFORMS
- Learn the background behind the development of INFORMS
- Understand the INFORMS training framework
- Identify available INFORMS resources and support

## Module 3: Summary

### Additional Training and Job Aids

Other training materials, related to this topic, include:

- ERP 102 - INFORMS Navigation, Reporting and Online Help
- FIN 101 - Financials Fundamentals
- SCM 101 - Supply Chain Management Fundamentals

You also have the following resources available to you:

- N/A

For additional information, be sure to visit:

- [Miamiidade.gov/informs](http://Miamiidade.gov/informs)
- Also include Financial Fundamentals and Supply Chain Fundamentals

## Module 3: Summary

### Key Terms



The following key terms are used in this guide:

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>Training Courses</b>	Learning sessions designed to help users understand how the system applies to their specific roles and responsibilities.
<b>Training Resources</b>	Supplemental learning tools to support users outside of formal sessions.
<b>ITD Service Center</b>	Team of Information Technology staff responsible for logging all technical support service tickets, including any INFORMS related requests, questions, or user experience issues.
<b>INFORMS Project Team</b>	Group of subject matter experts tasked with finding resolutions to any INFORMS related tickets regarding requests, questions, or user experience issues received by the ITD Service Center.