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## **End-User Training Guide**

**Course Code: HCM 101**

**Course: Introductory Course - Human Resources  
Fundamentals**

## Course Overview

### Course Description

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.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Human Resource Fundamentals
- Module 3: Course Summary

### Training Audiences

The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related INFORMS access:

- Department Personnel Representative (DPR)
- Manager

### Prerequisites

Participants are required to complete the following End-User Training courses prior to starting this course:

- ERP 101 – Overview of INFORMS
- ERP 102 – INFORMS Navigation and Online Help

### 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 3 Hours.

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## Module 1: Course Introduction

### Topics

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits of the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

## Module 1: Course Introduction

### Course Administration and Logistics

To receive credit for completing this course, which is necessary to be granted INFORMS access for performing related tasks in INFORMS, participants must:

- 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

### Course Learning Objectives

At the conclusion of this course, participants will be able to:

- Explain the key processes associated with HR Fundamentals
- Identify additional INFORMS HCM modules
- Understand the integration between modules within INFORMS HCM
- Understand the process of Reports & Queries

## Module 1: Course Introduction

### Training Audience: Roles and Responsibilities

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

- **Department Personnel Representatives (DPR):** The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.
- **Manager:** The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.





## Module 1: Course Introduction

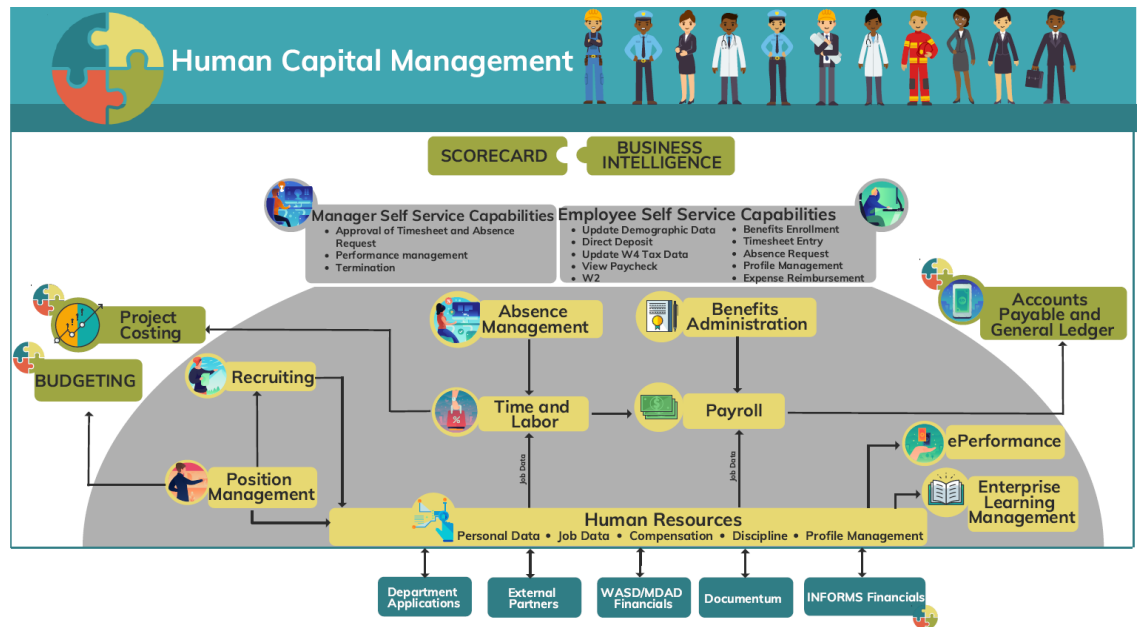
### Purpose and Benefits of the Business Process

The purpose and benefits of the Human Resource Fundamentals business process include:

- Reduce paper processes (Electronic workflows)
- Employee Empowerment (Employee Self Service and Manager Self Service)
- Reduction of processing time
- Recruit to Hire to Paycheck in one system
- Enhanced Reporting
- Job Opening - Defaults from Position
- Default Compensation, Add/Remove Components of Pay and Calculate Adjusted Rate
- Integrated payment and accounting for expense reimbursement
- Consolidated Benefit Billing System – LOA, retirees, and benefit billing all in one system

# Module 1: Course Introduction

The End-to-End Business Process



## Module 1: Course Introduction

### Module 1: Course Introduction Summary

The following key concepts were covered in this module:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Key Changes to the Business Process
- End-to-End Business Process
- Introduction to Demonstrations, Activities and Exercises

## Module 2: Human Resource Fundamentals

### Lessons

This module includes the following lessons:

- Introduction to Human Resources in INFORMS
- Key Process Changes
- Integration points between HR and other INFORMS modules
- HR End-to-End processes
- Reports & Queries

## Lesson 1: Introduction to Human Resources in INFORMS

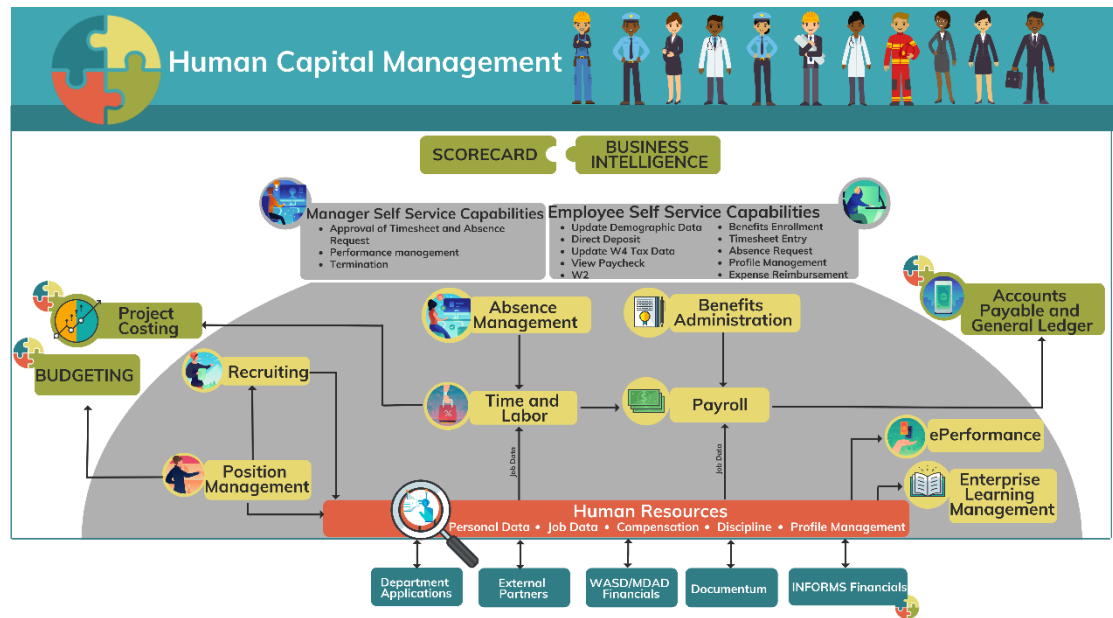
### Lesson 1: Overview

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

- Explain the key processes associated with HR Fundamentals
- Identify additional INFORMS HCM Modules
- Understand the integration between modules within INFORMS HCM

# Lesson 1: Introduction to Human Resources in INFORMS

## Lesson 1: Introduction



## Lesson 1: Introduction to Human Resources in INFORMS

### Key Terms



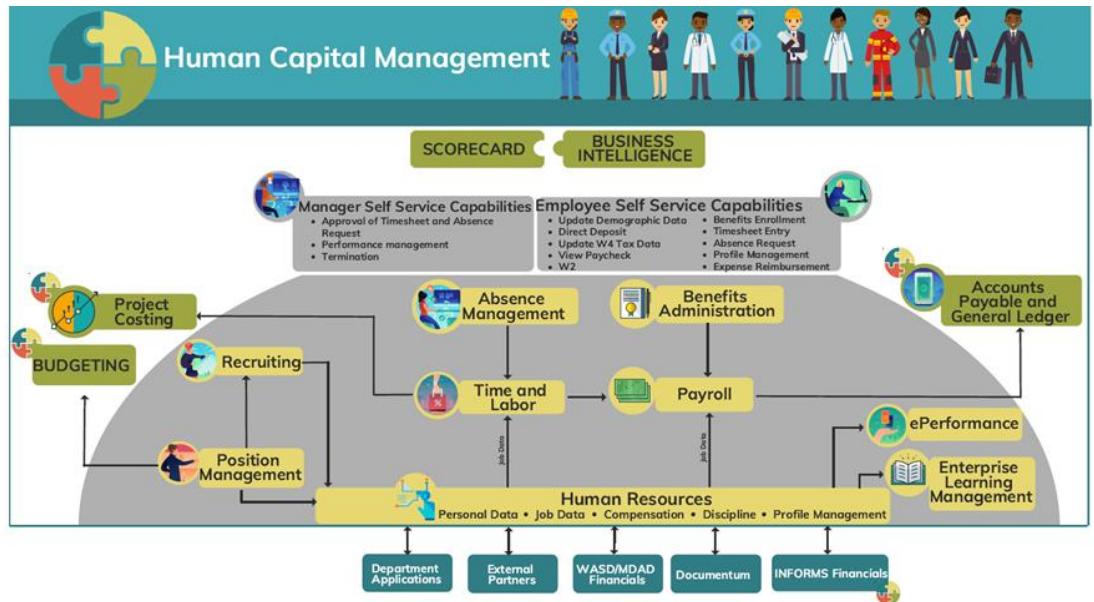
The following key terms are used in this module:

Term	Definition
<b>Human Capital Management (HCM)</b>	Human Capital Management is INFORMS suite of applications that includes modules such as HR, Payroll, Benefits, Time and Labor, Absence Management, TAM, among others
<b>Human Resource (HR)</b>	INFORMS module where employee personal and job information is processed and maintained
<b>Business Unit (BU)</b>	Logical units created to track and report specific business information. It is used to associate to a SETID
<b>Departments</b>	A business entity within the organization. Maintained by finance and typically represents a cost center. Also used to determine row level security.
<b>Location</b>	Physical work location of employees

## Lesson 1: Introduction to Human Resources in INFORMS

### Lecture 1: Introduction to Human Resources in INFORMS

The HR Fundamentals course provides an overview of Key Process Changes, integration point of HR and other modules throughout the employee’s employment lifecycle, and end to end process maintaining data within the Miami Dade County HCM INFORMS. This training is designed to provide step-by-step instruction on how to perform HR Fundamental activities in Miami Dade County INFORMS, and though it may touch upon business processes as required; this is not an department-specific training. Any business process questions or concerns should be addressed at each department. The below diagram depicts the architecture of the INFORMS Human Capital Management (HCM) modules.





## Lesson 1: Introduction to Human Resources in INFORMS

### Lecture 1: Introduction to Human Resources in INFORMS

Miami Dade County HCM has many modules that work together to move employee data throughout INFORMS, thus reducing duplicate data entry. Each module has a different purpose, but they are all related to the person that is entered into INFORMS through the HCM module. The following is a table that defines each INFORMS HCM module:

Module	Functionality
<b>Absence Management</b>	Tracks employees leave and manage leave requests.
<b>Benefits</b>	Allows employees to use self-service to enroll in and change their benefits; Provides benefit enrollment information to Electronic Fund Transfer (ETF) and plan vendors through an electronic interface; Uses benefit enrollments, job and employee demographic data and covered dependent information to automatically calculate deductions in the payroll module.
<b>eBenefits</b>	The employee self-service aspects of Benefits.
<b>Enterprise Learning Management (ELM)</b>	Enterprise Learning Management is an internet-based environment that allows users to participate in classes that improves user knowledge, skills, and abilities.
<b>ePay</b>	Uses self-service aspect of payroll (e.g., to view check).
<b>ePerformance</b>	This module will allow departments to conduct, track, store, and transfer evaluations; align their performance management process to the county process; report on performance management.
<b>eProfile</b>	eProfile is a collaborative application that enables employees to maintain their own personal data, thereby decreasing administrative time, costs, and increasing data integrity. Employees can view, update, and request changes to their personal data.

## Lesson 1: Introduction to Human Resources in INFORMS

### Lecture 1: Introduction to Human Resources in INFORMS

Module	Functionality
<b>Human Resources</b>	The Human Resources module offers position management and employee data.
<b>Payroll</b>	Uses information from Absence Management, Time and Labor, Benefits and HR, as well as data setup within the Payroll module to produce paychecks for employees and provide the necessary data for regulatory and financial reporting.
<b>Talent Acquisition Management</b>	The Talent Acquisition Management is an INFORMS solution for candidates, recruiters and managers. Used for recruiting processing allowing employees and externa, candidates to search, view and apply for jobs online.
<b>Time and Labor</b>	Allows employees to record and supervisors to review and approve work hours and task distribution. This data, along with leave time from Absence Management, is sent to Payroll to produce paychecks. The distribution data entered here is passed to Finance modules to provide detailed fiscal and project reporting.

## Lesson 1: Introduction to Human Resources in INFORMS

### Lecture 1: Introduction to Human Resources in INFORMS

The process flow below depicts the high-level processes involved in the employment lifecycle:



Note that the term “employee” as it relates to the process outlined above may, in fact, refer to any of the three different types of departmental relationships:

- **Employee:** A person who is hired to provide services to the department and has a legal employee relationship with the department.
- **Contingent Worker:** A person who provides services to the department and who does not have a legal employee relationship with the department. An example of this type of departmental relationship is a contractor.
- **Person of Interest (POI):** A person who is not an employee or contingent worker but is of interest to the County is a POI. An example of this type of County relationship is a volunteer.

The distinction between these departmental relationships is of key performance as it relates to the HR/Payroll, as well as other INFORMS modules. Each departmental relationship will be discussed in more detail in Lessons 3 and 4, including their unique attributes and divergences from the flow above.

## Lesson 1: Introduction to Human Resources in INFORMS

### Lesson Summary



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

- Explain the key processes associated with HR Fundamentals
- Identify additional INFORMS HCM Modules
- Understand the integration between modules within INFORMS HCM

## Lesson 2: Key Process Changes

### Lesson 2: Overview

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

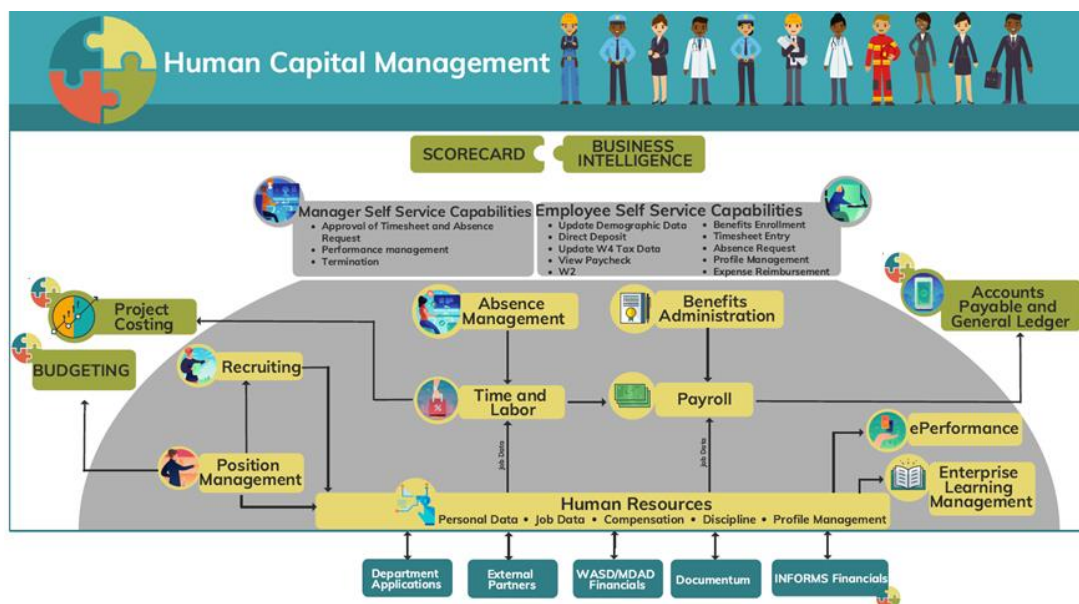
- Understand the Key Process changes to the following Business Areas of HCM:
  - Hire to Pay Process
  - HR & Self-Service Process
  - Time and Absence

## Lesson 2: Key Process Changes

### Lesson 2: Introduction

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 overall key process changes are outlined in this lesson.



## Lesson 2: Key Process Changes

### Key Terms



The following key terms are used in this module:

Term	Definition
<b>Position Management</b>	Position Management is the process by which departments determine how jobs are defined, how many positions are needed, and what the County structure should look like.
<b>Recruiting</b>	Recruiting is the process of identifying, attracting, interviewing, selecting, hiring and onboarding employees.
<b>Manage Hire</b>	The Manage Hire Process enables administrators to review applicant requirement data and perform various applicant related task.
<b>Benefits Processing</b>	The Benefits Processing provides departments the tools that are needed to manage employee benefit programs.
<b>Time and Absence</b>	Time and Absence enable department users to manage time reporter data and schedules, review and approve absence request and time submission and manage exceptions.
<b>Payroll Processing</b>	The Payroll processing receives the processed data from Time and Labor to produce earnings and track deductions and garnishments. Providing gross to net calculations.
<b>Administer Compensation</b>	A segment of human resource management that focuses on planning, organizing and controlling the direct and indirect payments employees receive for the work they perform
<b>Time Reporter Data</b>	Determines the information an employee must provide for work hours on the timesheet, Punch or Elapsed
<b>Absence Request</b>	The absence request is- a leave request that is submitted for approval.
<b>Approval</b>	The approval gives a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals

## Lesson 2: Key Process Changes

### Lecture 1: Hire to Pay

This lesson will review Key Process Changes.

The **Hire to Pay** Business Process is composed of different business areas. These business areas contain key changes which impactful to the HCM process:

#### **Position Management**

Departments can submit request for new or changes to Position Data

- For a new position, position data is updated after Budget and Compensation approval
- For an existing position, position data is updated after HR Central Position Administration approval

#### **Recruiting**

- Job Opening - Defaults from Position / Non-Person profiles
  - Departments can attach the question sets specific to the job opening in the advertisement (with compensation approval)
  - Departments can work with Central HR for enhanced screening
- Additional statuses for better applicant tracking

#### **Manage Hire**

- DPR role completes the Manage Hire process
- Data elements default from Position Data
- Components of pay will be included as part of the Manage Hire process instead of PCD

#### **Benefits Processing**

- Benefits eligibility is determined based on the employee data
- FRS is a Benefit Plan
- Imputed Income is calculated automatically
- Benefit Billing is a consolidated process



## Lesson 2: Key Process Changes

### Lecture 1: Hire to Pay

#### Time and Absence

- Self-Service absence request and supervisor approval
  - Make current and future absence requests online (no paper!)
  - Review absence eligibility upon submit
- Time and Labor rules generate exceptions
  - Address exceptions generated by the system

#### Payroll Processing

- Payroll Processing in HCM instead of Time and Leave
- Payroll processing occurs by functional team. It is non-technical
- Payroll system Configuration Ownerships, i.e. Paygroups, Earning code, deductions, new DD banks, etc.
- Vendor Payments: Garnishment, Benefits, Taxes thru A/P
- General Deductions will process in Payroll Module
- Payroll edits (i.e., adding one-time deduction payment to employee' paycheck)
- Self-Service
  - Paystub (PDF paycheck)

#### Administer Compensation

- Enter Effective Date
- Select Action/Action Reason
- Maintain Step in Salary Plan tab
- Compensation tab allows
  - Default Compensation
  - Add/Remove Components of Pay
  - Calculate Adjusted Rate
- Compensation
  - DPR Salary Change Tool
  - Components of Pay (Rate Codes)
- Compensation role can apply COLA to Pay Plan
- HR Administrator role can apply COLA to all employees in impacted union
- Benefits Participation tab
  - Retirement Kind
  - Executive Level
  - Benefit Program Eligibility

## Lesson 2: Key Process Changes

### Lecture 2: HR & Self Service

The **HR & Self Service** Business Processes are composed of different business areas. These business areas contain key changes which are impactful to the HCM process:

#### **Department Personnel Representative (DPR) Salary Change**

- Paperless
- Effective Dated (will trigger Retro Pay if the transaction is retroactive)
- Specify Action/Action Reason change and attach supporting documentation
- Automatic update of Job Data (once approved by Central HR)
- Job Data Compensation tab contains
- Base pay
- Additional Components of Pay

#### **Manager Hire**

- DPR role completes the Manage Hire process
- Data elements default from Position Data
- Components of pay will be included as part of the Manage Hire process instead of PCD

#### **Position Management**

- Departments can submit request for new or changes to Position Data
  - Position Data updated after Budget and Compensation approve"
- Position Data now requires:
  - Lower-level Department IDs along with default funding string
  - Reg/Temp Indicator - controls FRS and Benefits Eligibility
  - Job Code will default
    - Union Code
    - Salary Plan and Grade

## Lesson 2: Key Process Changes

### Lecture 3: Time and Absence

The **Time and Absence** Business Process is composed of different business areas. These business areas contain key changes which impactful to the HCM process:

#### **Time Reporter Data**

- At hire, rehire, and when there are specific employee data changes, Time Reporter Data must be updated
- Changes are effective dated
- Required Time Reporter Data
  - Effective Date
  - Time Reporter Type
  - Elapsed Time Template
  - Punch Time Template
  - Workgroup
  - Taskgroup

#### **Absence Request and Approval**

- Paperless Absence Request and Approval
- Employees can request future dated absence
- Eligibility is validated upon request (User cannot submit if the Employee is not eligible)
- Sick Conversion Waiver and/or Payouts can be requested online
- Ability to add Attachments for all Absences Requests

## Lesson 2: Key Process Changes

### Lesson Summary



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

- Understand the Key Process changes to the following Business Areas of HCM:
  - Hire to Pay Process
  - HR & Self-Service Process
  - Time and Absence

## Lesson 3: Integration Points between HR and other INFORMS Modules

### Lesson 3: Overview

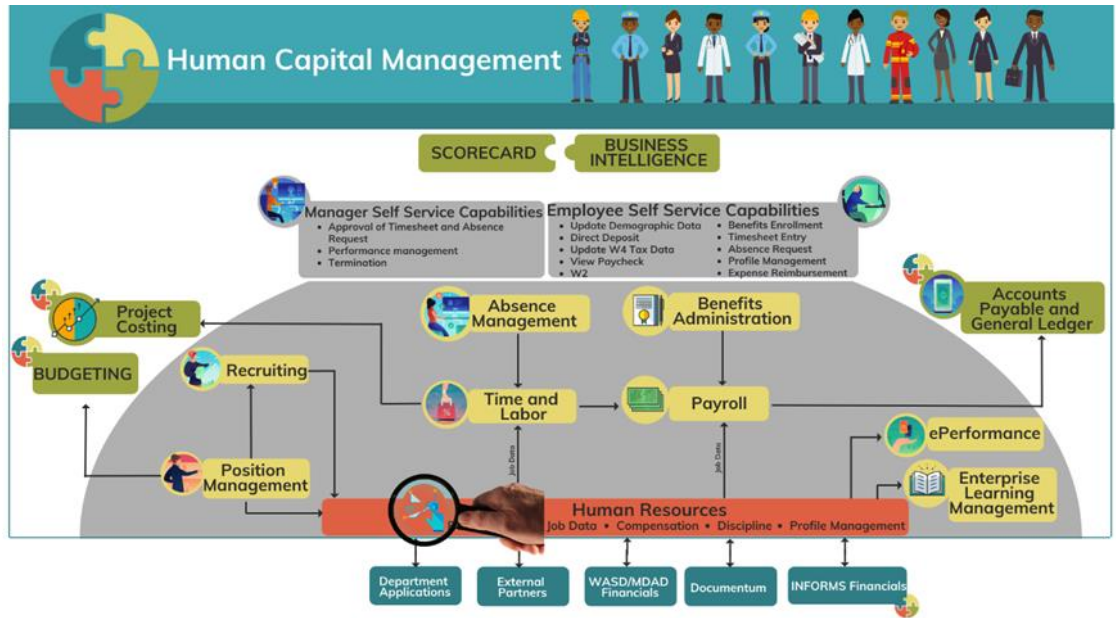
At the conclusion of this lesson, you will be able to:

- Understand the integration of HR with other INFORMS modules and integration partners

# Lesson 3: Integration Points between HR and other INFORMS Modules

## Lesson 3: Introduction

INFORMS appropriately integrates with other modules and partners to provide an overall solution to the County.



## Lesson 3: Integration Points between HR and other INFORMS Modules

### Key Terms



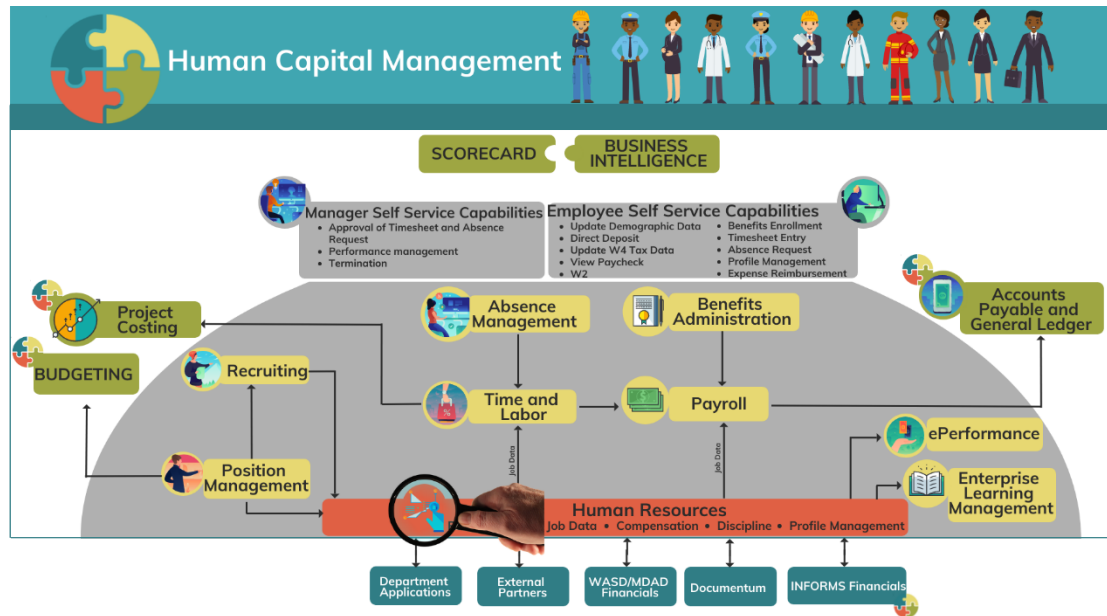
The following key terms are used in this module:

Term	Definition
<b>Department Applications</b>	Department Applications are systems within Miami-Dade County outside of INFORMS that receive and consume HCM data.
<b>External Partners</b>	External Partners have systems outside of Miami-Dade County that either provide or receive HCM data.
<b>WASD/MDAD Financials</b>	WASD/MDAD Financials is PeopleSoft Financial instance used by WASD and MDAD that is different that enterprise wide INFORMS FSCM system that receive and consume HCM data.
<b>Documentum</b>	Documentum is a repository in which County content is stored securely.
<b>INFORMS Financials</b>	INFORMS Financials is the County wide Financials and Supply Chain system that provide and receive HCM data.

## Lesson 3: Integration Points between HR and other INFORMS Modules

### Lecture 1: Integration Points between HR and other INFORMS Modules

INFORMS Human Capital Management (HCM) is composed of HR modules which integrate with INFORMS Financials and other department applications.



As part of the integration process, the department applications, external partners, WASD/MDAD Financials, Documentum and INFORMS Financials take part in providing data to and from HR.

The following data is stored and maintained in HR to be used by other modules within INFORMS and integration partners:

- **Personal Data:** Any information related to an identified employee. For example, the telephone number, address, legal name, personnel number, etc.
- **Job Data:** Any information related to the employee job. This includes the department of employment, ethnicity, gender, total hours worked.
- **Compensation:** Any information related to the employee's pay. For example, total rewards.
- **Discipline:** The regulation of employee activity to establish standards of job performance at work.
- **Profile Management:** The process of managing employee settings on County devices. For example, employee roles and profiles can address the security requirements of the organization and ensure continuous compliance of all devices.



## Lesson 3: Integration points between HR and other INFORMS modules

### Lesson Summary



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

- Understand the integration of HR with other INFORMS modules and integration partners

## Lesson 4: HR End-to-End processes

### Lesson 4: Overview

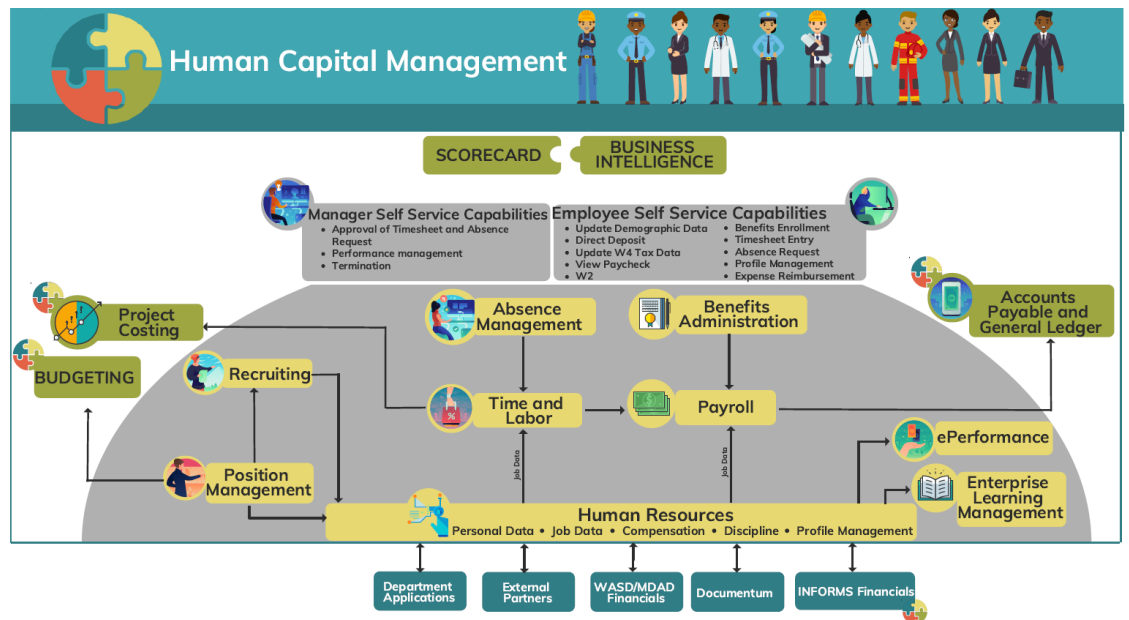
At the conclusion of this lesson, you will be able to:

- Understand the HR Fundamentals end-to-end processes
  - Position Management
  - Recruiting
  - Time and Labor
  - Absence Management
  - Payroll
  - Benefits Administration
  - ePerformance
  - Enterprise Learning Management (ELM)

## Lesson 4: HR End-to-End processes

### Lesson 4: Introduction

This lesson includes overview of the following INFORMS functional areas:



## Lesson 4: HR End-to-End processes

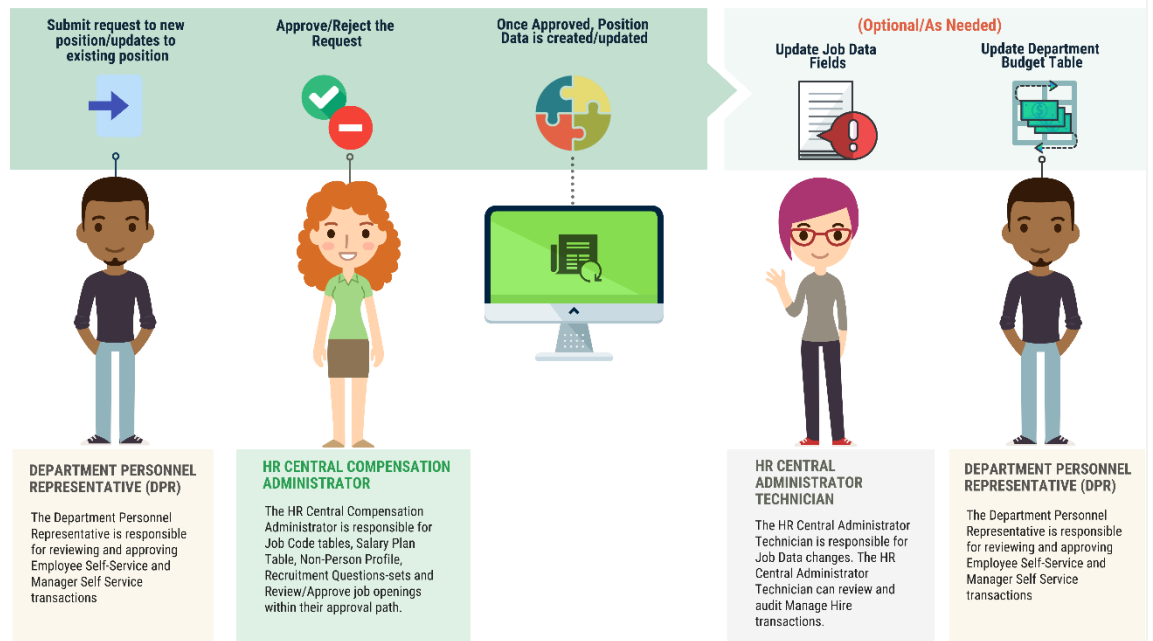
### Lecture 1: Introduction to Position Management

To initiate the process of hiring within Miami-Dade County, a Department Personnel Representative (DPR) creates a position in Position Management. When the position is authorized and the job is in the approval process, the budget office reviews and sets the budget within the department.

### DEPARTMENT BUDGET TABLE UPDATE BUSINESS PROCESS



### POSITION MANAGEMENT APPROVAL BUSINESS PROCESS

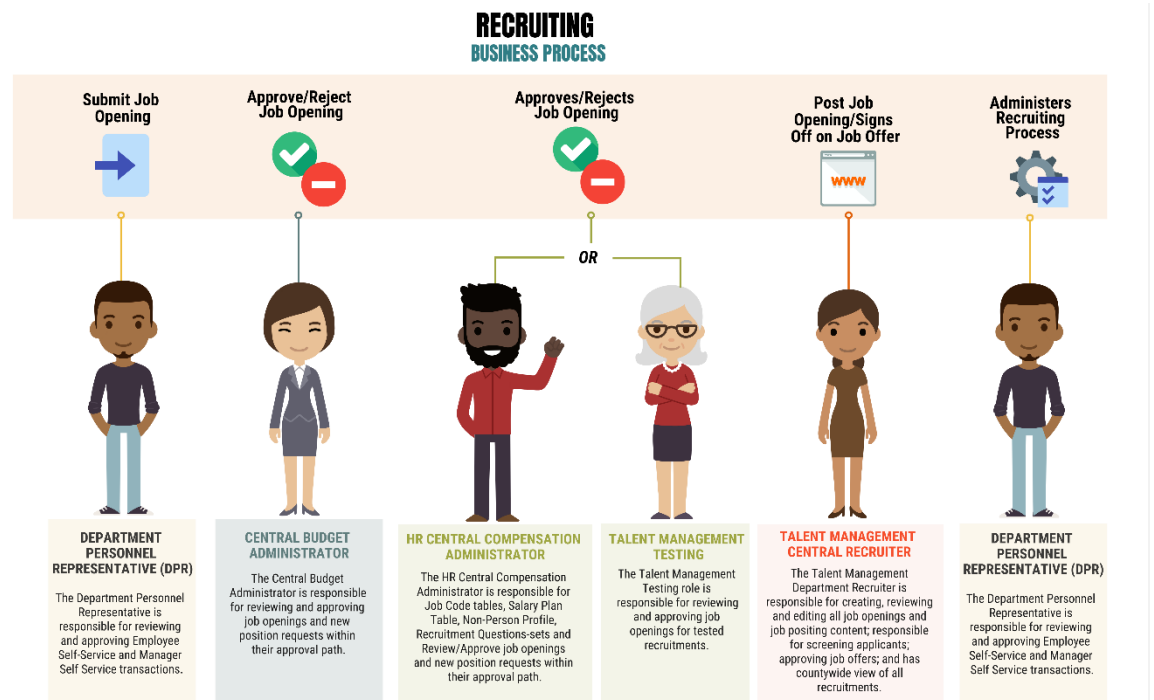


## Lesson 4: HR End-to-End processes

### Lecture 2: Recruitment

Once the position is created and fully approved, external and/or internal candidates can see the job posting. This allows candidates to enter the required information which includes personal data to apply for the position.

The information gathered from the job posting is gathered in Human Resources (HR). This helps by keeping an effective dated history of all positions regardless of whether they are filled. The information gathered is utilized by other business areas, partners, and modules within INFORMS.

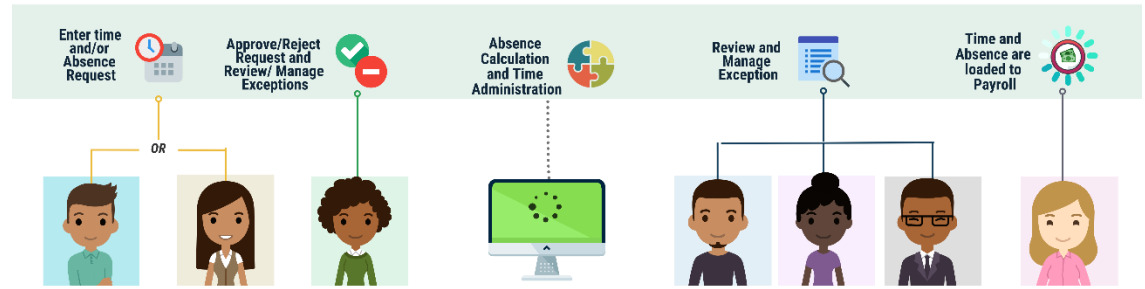


## Lesson 4: HR End-to-End processes

### Lecture 3: Time and Labor

If a position is awarded to an applicant, the applicant goes through the hiring process for the department. This includes an explanation on how to report working hours and leave directly into INFORMS. INFORMS is configured to align with Miami-Dade County on time reporting and leave policies.

#### TIME AND ABSENCE APPROVAL BUSINESS PROCESS



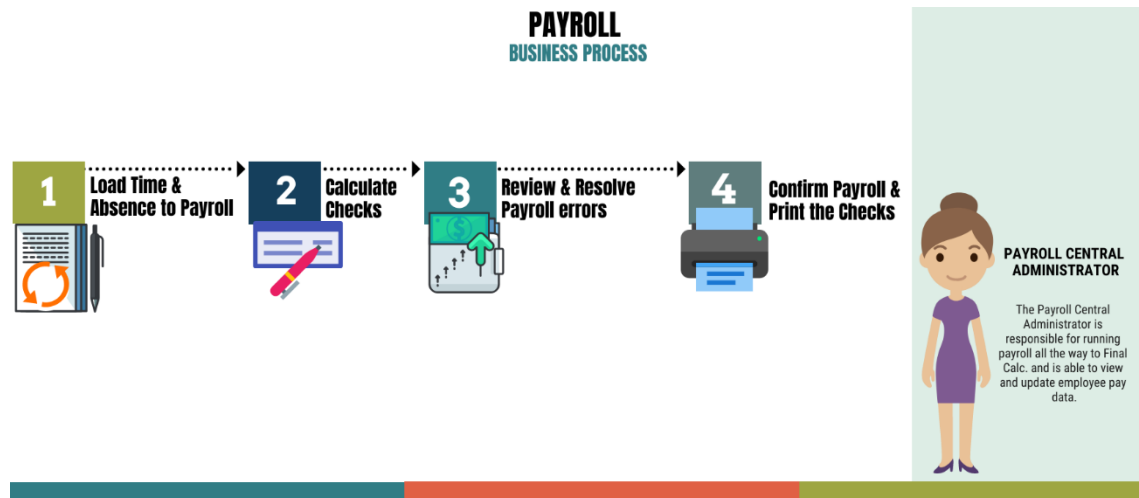
#### Roles and Descriptions



## Lesson 4: HR End-to-End processes

### Lecture 4: Payroll

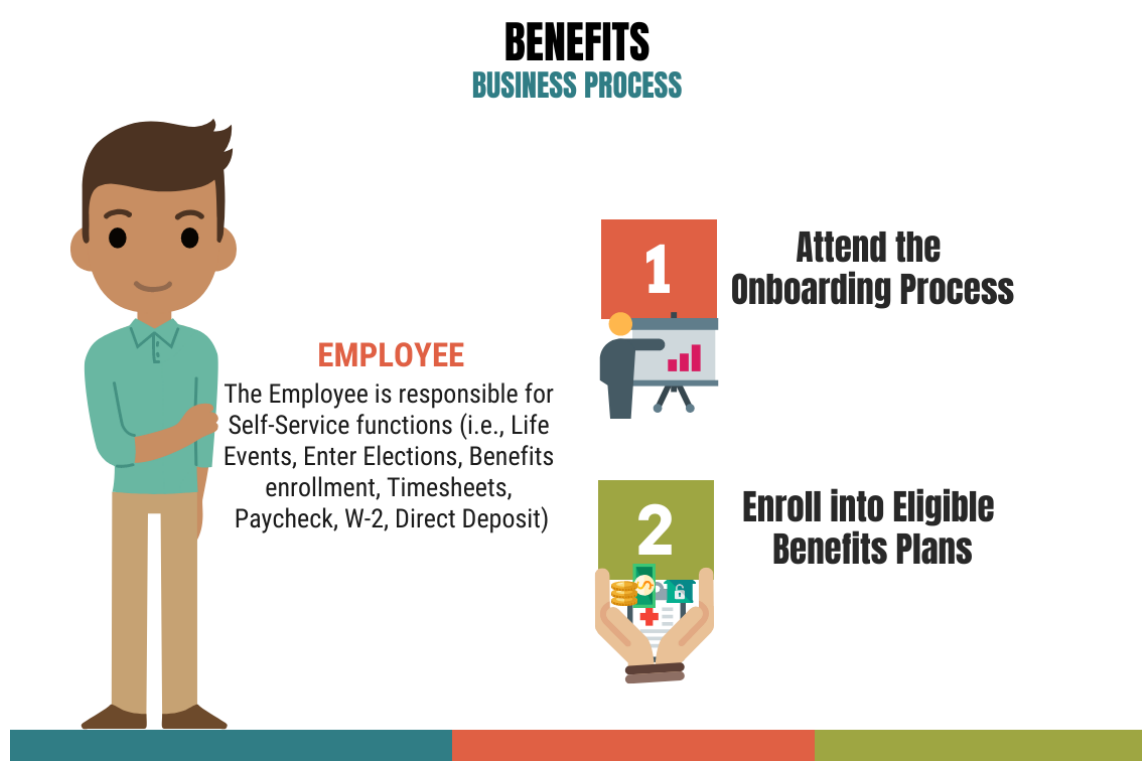
The time and leave submitted in INFORMS, is calculated for payroll processing. Payroll processing includes entries that impact gross wages, as well as deductions, taxes, court-ordered withholdings, etc. The payroll process uses Accounts Payable and General Ledger information from INFORMS Financials to pay the employee.



## Lesson 4: HR End-to-End processes

### Lecture 5: Benefits

During this process, employee data is provided by HR which includes personal data, job data, compensation, discipline and profile management. In parallel to the Payroll process, the Benefits Administration takes place which determines the employee benefits eligibility based on the eligibility rules, job changes and life events; also used to automate Open Enrollment.

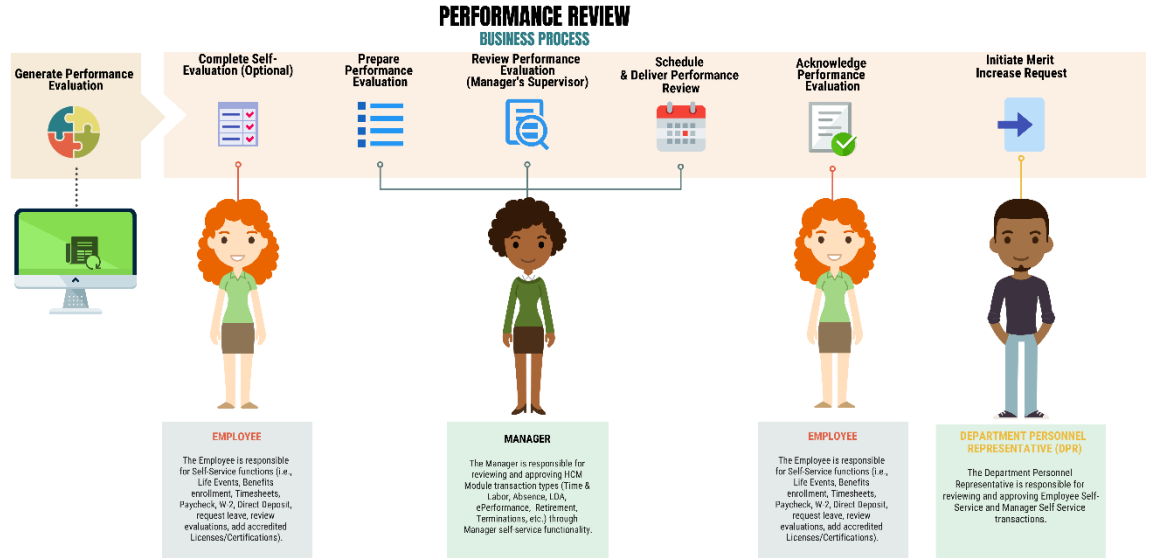




## Lesson 4: HR End-to-End processes

### Lecture 6: ePerformance

For performance evaluations, INFORMS provides an integrated module that offers a self-service evaluation management application for managers, employees, and HR administrators used for planning, collaboration, communication, assessment, and monitoring evaluations. This application supports the entire planning and evaluation process through assessment and rewarding employees based on their performance.



## Lesson 4: HR End-to-End processes

### Lecture 7: Enterprise Learning Management (ELM)

To maintain employees compliance, the Enterprise Learning Management (ELM) application is designed to track, report and manage trainings and learners activity. To associate the employee with the appropriate trainings and learning activities, HR data is used.

Enterprise Learning Management is an internet-based environment that allows users to participate in classes that improves user knowledge, skills, and abilities.

## Lesson 4: Lesson Summary

### Lesson Summary



Having completed the HR End-to-End processes lesson, you should be able to:

- Understand the HR Fundamentals end-to-end processes
  - Position Management
  - Recruiting
  - Time and Labor
  - Absence Management
  - Payroll
  - Benefits Administration
  - ePerformance
  - Enterprise Learning Management (ELM)

## Lesson 5: Reports & Queries

### Lesson 5: Overview

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

- Run reports in INFORMS
- Use the Report Manager

## Lesson 5: Reports & Queries

### Lesson 5:

The following key terms are used in this Lesson.

### Key Terms



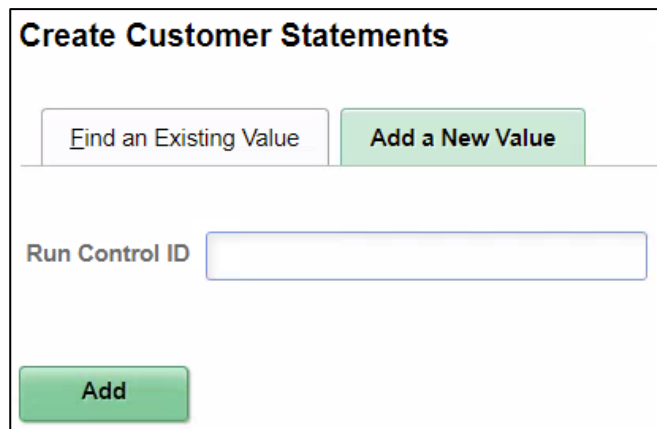
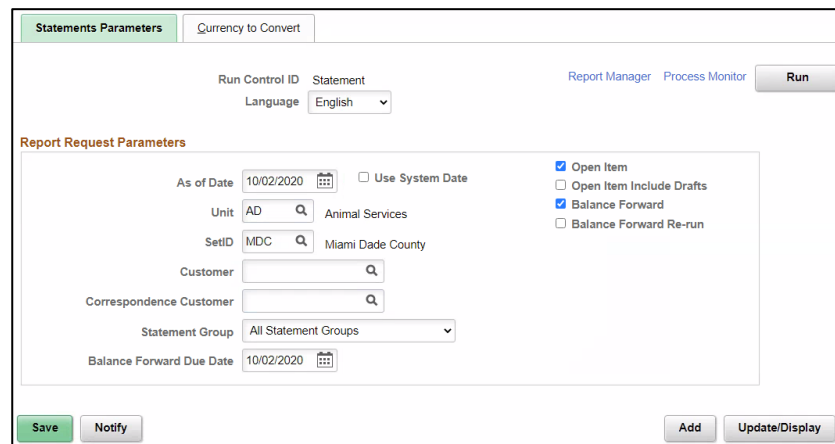
Term	Definition
<b>PeopleTools</b>	PeopleTools provides the underlying technology for INFORMS applications. All INFORMS applications are built, deployed and maintained using PeopleTools.
<b>Process Scheduler</b>	The primary role of Process Scheduler is to support the INFORMS application environment. 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 users 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 users runs a report, users create and save a run control with those settings. The next time users run the report, users select the run control and INFORMS fills in the settings.

## Lesson 5: Reports & Queries

### Lecture 1: Reports & Queries

This lesson will review Running INFORMS Reports.

- There are two ways to run reports in INFORMS.
  - Process Scheduler Reporting
  - Reporting Tools
- **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.

- **INFORMS Reporting Tools** span wide-ranging information access needs of the organization, from end-users querying and exploration to multidimensional reporting and analysis, to production reporting.
- Each tool has its own manager and viewer to search and run an existing report.

## Lesson 5: Reports & Queries

### Lecture 1: Reports & Queries

### Lecture 1: How to run reports in INFORMS

- Reporting Tools include the following technologies.
  - **Queries.** INFORMS Query provides a user-friendly, intuitive way to generate ad-hoc and scheduled reports quickly from any data stored in INFORMS tables. The queries include Composite Queries, INFORMS Query and Connected Query. Below is the sample from INFORMS Query.

**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

Search
[Advanced Search](#)

**Search Results**

Too many Items met your search criteria. Only the first 300 Items displayed.

\*Folder View -- All Folders --

**Query**

☰ Q
1-30 of 300
View 100

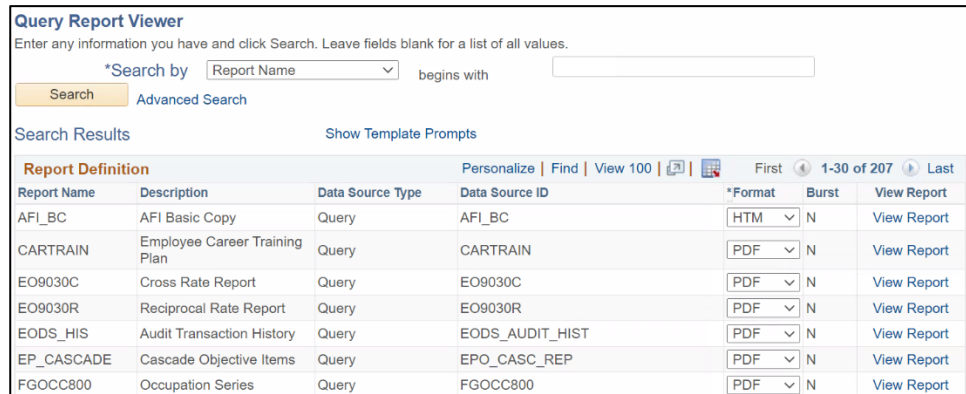
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
ACA_FULL_PART_TIME	ACA Full time/Part time Status	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
ACA_HIRE_REHIRE_QRY	ACA Hire/Rehire Query	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>
ACA_MONTH	ACA Months Query	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>
ACA_MONTHLY_THRESHOLD	ACA Monthly Threshold Rpt Prom	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>
ACA_MONTHLY_THRESHOLD_PROMPTED	ACA Monthly Threshold Rpt Prom	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>
ACA_SAMPLE_FOR_EXTRACT1	Sample ACA Extract Employees 1	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>
ACA_SAMPLE_FOR_EXTRACT2	Sample ACA Extract Employees 2	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>

## Lesson 5: Reports & Queries

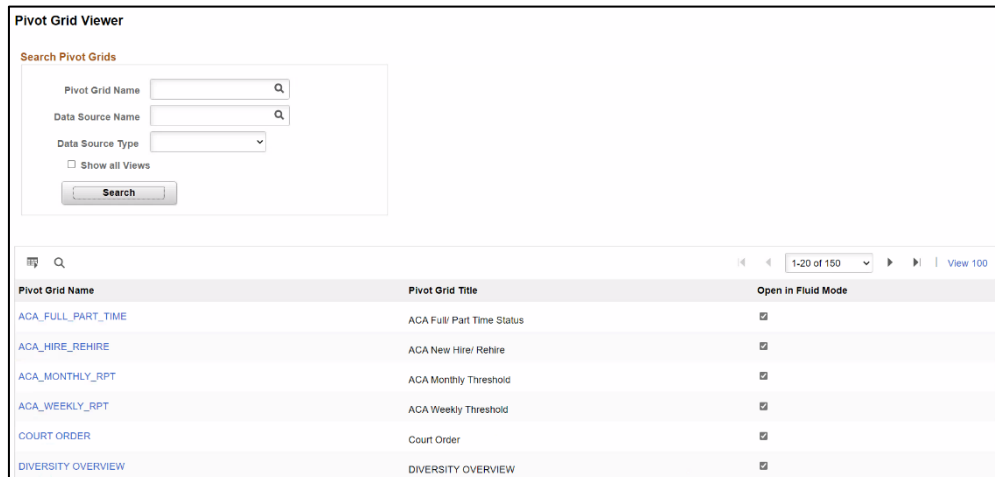
### Lecture 1: Reports & Queries

### Lecture 1: How to run reports in INFORMS

- **BI Publisher.** Oracle provides a standalone Java-based reporting technology named BI Publisher (BIP) that streamlines reports and form generation. BIP separates the data extraction process from the report layout. BI Publisher for INFORMS provides an environment for the power business users to manage templates, data sources, reports, translations, content components and to produce reports according to a user’s-defined criterion.



- **Pivot Grid.** INFORMS Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table and chart representation of data using INFORMS Query 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.





## Lesson 5: Reports & Queries

### Lecture 1: Reports & Queries

### Lecture 2: How to use the Report Manager

This lesson will review using the **Report Manager**.

- The **INFORMS Process Scheduler** is a centralized tool that enables application developers, system administrators and application users to manage INFORMS batch processes. A process can be running programs, batch programs, or reports.
- The **Report Manager** is part of the INFORMS Process Scheduler and provides a framework for viewing report output based on user privileges.
- Using the **Report Manager**, users can see all of the reports authorized to view by opening the report list. Folders are provided to assist in organizing reports and reducing the size of the report lists.

List

Explorer

Administration

Archives

**View Reports For**

Folder

Instance  to

Name

Created On

Last

Days

**Reports**

1-1 of 1

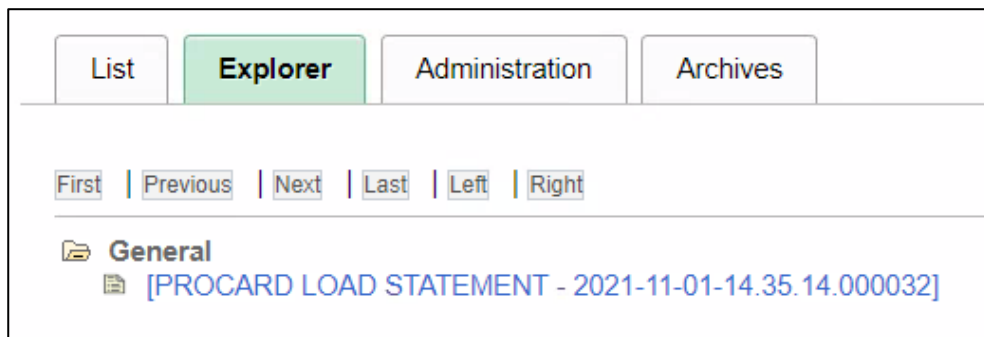
Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 <a href="#">Report</a>					

- Reporting folders are used to assist in organizing reports and reducing the size of the report lists.
- The users can view a list of reports to which users have access, or select a hierarchical view of folders and reports.

## Lesson 5: Reports & Queries

Lecture 1:  
Reports &  
Queries

Lecture 2: How to use the Report Manager



- Maintaining reports. Users can delete reports, add users to the distribution list, or view archived reports.
- Selecting the links of the reports in the list or tree view will direct the users to the Report Index which gives them access to view the generated reports or logs.

**Report**

Report ID 148926	Process Instance 347428	<a href="#">Message Log</a>
Name PO_CCLOADLD	Process Type Application Engine	
Run Status Success		

ProCard Load Statement

**Distribution Details**

Distribution Node EFS92TRN	Expiration Date <input type="text" value="12/31/2021"/>
----------------------------	---

**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">AE_PO_CCLOADLD_347428.stdout</a>	293	11/01/2021 2:35:14.000032PM EDT

**Distribute To**

Distribution ID Type	Distribution ID
User	T0140585

## Lesson 5: Reports & Queries

### Lecture 1: Reports & Queries

Now that users have completed the lesson, users should be able to.

- Run reports in INFORMS
- Use the Report Manager

## Module 3: Course Summary

### Objectives Achieved



Congratulations! You have completed the HR Fundamentals course. You now should be able to:

- Explain the key processes associated with Core HR
- Identify additional Miami Dade County HCM modules
- Understand the integration between modules within Miami Dade County HCM

### Next Steps

Now that you have completed the course, please make sure to complete the following tasks:

- Course assessment (tests your knowledge of the content)
- Course evaluation (collects course feedback)
- Log off your workstation

## Reference Materials

### Reference Materials



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

User Productivity Kits

- BI Publisher
- Query Viewer

For additional Information:

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

## Glossary

### Key Terms



The following key terms are used in this course:

Term	Definition
<b>Human Capital Management (HCM)</b>	Human Capital Management is INFORMS suite of applications that includes modules such as HR, Payroll, Benefits, Time and Labor, Absence Management, TAM, among others.
<b>Human Resource (HR)</b>	INFORMS module where employee personal and job information is processed and maintained.
<b>Business Unit (BU)</b>	Logical units created to track and report specific business information. It is used to associate to a SETID.
<b>Departments</b>	A business entity within the organization. Maintained by finance and typically represents a cost center. Also used to determine row level security.
<b>Location</b>	Physical work location of employees.
<b>Position Management</b>	Position Management is the process by which departments determine how jobs are defined, how many positions are needed, and what the County structure should look like.
<b>Recruiting</b>	Recruiting is the process of identifying, attracting, interviewing, selecting, hiring and onboarding employees.
<b>Manage Hire</b>	The Manage Hire Process enables administrators to review applicant requirement data and perform various applicant related task.
<b>Benefits Processing</b>	The Benefits Processing provides departments the tools that are needed to manage employee benefit programs.
<b>Time and Absence</b>	Time and Absence enable department users to manage time reporter data and schedules, review and approve absence request and time submission and manage exceptions.
<b>Payroll Processing</b>	The Payroll processing receives the processed data from Time and Labor to produce earnings and track deductions and garnishments. Providing gross to net calculations.
<b>Administer Compensation</b>	A segment of human resource management that focuses on planning, organizing and controlling the direct and indirect payments employees receive for the work they perform.

## Glossary

### Key Terms



The following key terms are used in this course:

Term	Definition
<b>Time Reporter Data</b>	Determines the information an employee must provide for work hours on the timesheet, Punch or Elapsed.
<b>Absence Request</b>	The absence request is- a leave request that is submitted for approval.
<b>Approval</b>	The approval gives a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.
<b>Department Applications</b>	Department Applications are systems within Miami-Dade County outside of INFORMS that receive and consume HCM data.
<b>External Partners</b>	External Partners have systems outside of Miami-Dade County that either provide or receive HCM data.
<b>WASD/MDAD Financials</b>	WASD/MDAD Financials is PeopleSoft Financial instance used by WASD and MDAD that is different that enterprise wide INFORMS FSCM system that receive and consume HCM data.
<b>Documentum</b>	Documentum is a repository in which County content is stored securely.
<b>INFORMS Financials</b>	INFORMS Financials is the County wide Financials and Supply Chain system that provide and receive HCM data.
<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 users 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 users runs a report, users create and save a run control with those settings. The next time users run the report, users select the run control and INFORMS fills in the settings.