

Course ID: ERP 101  
Course: Overview of INFORMS

# Ground Rules



Be on time



Attendance



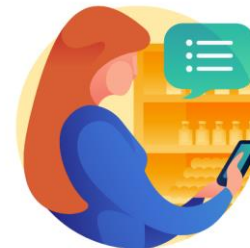
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

# Course Overview

## Course Description

This course provides a comprehensive review of the HR Fundamentals 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 difference between INFORMS Roles vs Jobs
  - INFORMS Project Training Overview
- Module 3: Course Summary

# Course Overview continued

<b>Training Audiences</b>	<ul style="list-style-type: none"><li>• All INFORMS users</li></ul>
<b>Prerequisites</b>	<ul style="list-style-type: none"><li>• None</li></ul>
<b>Estimated Duration</b>	<ul style="list-style-type: none"><li>• 30 Minutes</li></ul>

# Module 1: Course Introduction

## Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

# Course Administration and Logistics



To receive credit for completing this course, Users must record your attendance at the beginning and end of class



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



Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

# Learning Objectives

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

# Roles and Responsibilities

All INFORMS End-Users will participate in ERP 101 – Overview of INFORMS.





# Module 1: Course Introduction Summary

## Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

# Module 2: Overview of INFORMS

## Module Topics

### Module Introduction

- Lesson 1: INFORMS Project Overview, Objectives and Goals
- Lesson 2: Journey through the INFORMS Project
- Lesson 3: The differences between INFORMS Roles and Jobs
- Lesson 4: INFORMS Project Training Overview

# Lesson 1: INFORMS Project Overview, Objectives and Goals

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

# Lesson 1: Key Terms

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 the 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>Strategic Business Management Division (SBM)</b>	A division under the Office of Management and Budget. SBM was formed in February of 2020 with the purpose of providing support for INFORMS.
<b>Supply Chain Management</b>	This is the procurement function of INFORMS.

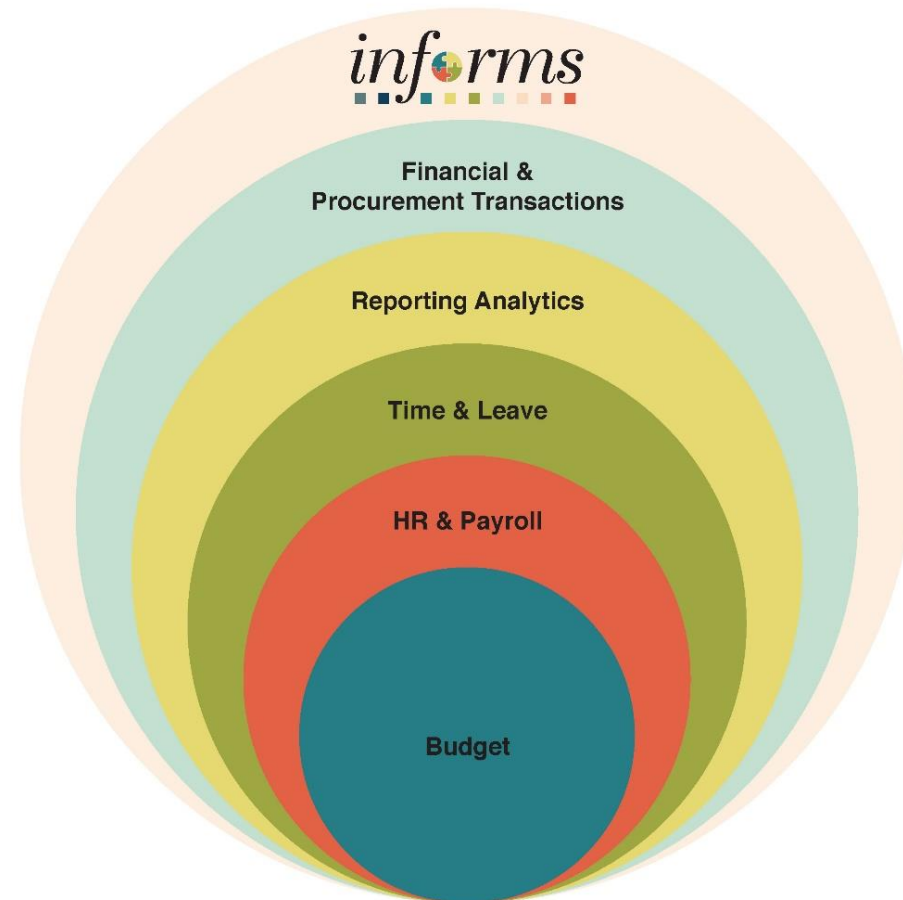
# Lesson 1: INFORMS Project Overview, Objectives and Goals

- **INFORMS** stands for **IN**tegrated **F**inancial **R**esources **M**anagement System.
- **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.

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

- 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 Project Overview, Objectives and Goals, Continued



# Lesson 2: Journey through the INFORMS Project

- The current HR and Payroll systems, Time and Leave and PeopleSoft 9.1, have reached the end of their useful life. The County has acquired and implemented various Oracle ERP software products to enable more efficient business processes.
- The new solution, INFORMS, will become the system of record/functionality for Human Resources, Procurement, Finance, Budgeting, and related Reporting.



# 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 you complete as part of your responsibilities. Individuals with the same job title may perform different tasks and have different responsibilities within the County and even the same department.
- 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.

# Lesson 4: INFORMS Training Overview

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 PeopleSoft, including the use of its menus and features for standard navigation within the application. This course also provides an overview of reporting functionality in PeopleSoft, including standard and customized query capabilities.
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.

# Lesson 4: INFORMS Training Overview, Continued

Course ID	Course Name	Description
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.
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.

# Lesson 4: INFORMS Training Overview, Continued

Course ID	Course Name	Description
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 reports for employees, recording and submitting retirement, resignations and involuntary separation for employees.

# Lesson 4: INFORMS Training Overview, Continued

Course ID	Course Name	Description
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.
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.

# Lesson 4: INFORMS Training Overview, Continued

Course ID	Course Name	Description
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 creating and submitting travel authorizations and the end-to-end process of the workflow approvals (Process, Approve, Deny and Push Back).
FIN 215	Reimbursement Request	This course provides a comprehensive review of entering work-related expenses and creating expense reports in INFORMS. This course includes the expense report workflow and the process outlined in detail to demonstrate the capabilities of the business process.

# Module 2: Overview of ERP Summary

## Module Topics

### Module Introduction

- Lesson 1: INFORMS Project Overview, Objectives and Goals
- Lesson 2: Journey through the INFORMS Project
- Lesson 3: The differences between INFORMS Roles and Jobs
- Lesson 4: INFORMS Project Training Overview

# Module 3: Course Summary

## Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary



# Course Content Summary

Congratulations on completing the Overview of INFORMS. Participants should now understand:

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

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

# Additional Training and Job Aids

- Users also have the following resources available:

## **Student Guide**

- Overview of INFORMS

## **User Productivity Kits**

- Overview of INFORMS

For additional information, be sure to visit:

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



**CONGRATULATIONS**

Congratulations on successfully completing the *Overview of INFORMS* course!

**ERP 101 – Overview of INFORMS**