Course ID: ERP 101
Course: Overview of INFORMS

Ground Rules

Be on time

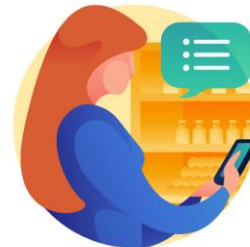Turn off your cell phones when in class

Participate actively in class; refrain from email and internet use

Attendance

Take breaks as needed

Feel free to ask questions

Course Overview

Course Description	This course provides a comprehensive review of the Overview of ERP processes.
	This course consists of the following modules:
	• Module 1: Course Introduction
	• Module 2: Overview of ERP
	• Module 3: Course Summary
Training Audiences	• All INFORMS End-Users
Prerequisites	• None
Estimated Duration	• 1 Hour

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Course Outline

Content
Module 1: Course Introduction
Module 2: Overview of INFORMS
• Lesson 1: INFORMS Project Overview, Objectives, and Goals
• Lesson 2: Journey through the INFORMS Project
• Lesson 3: INFORMS Project Training Overview
• Lesson 4: Post Go-Live Support (Strategic Business Management)
Module 3: Course Summary

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 <u>and</u> end of clas

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

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Learning Objectives

- Understand INFORMS Overview, Objectives, and Goals

- Understand the Journey through the INFORMS Project

- Understand INFORMS Training

- Understand Post Go-Live Support (Strategic Business Management)

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 ERP

Module Topics
Module Introduction
Lesson 1: INFORMS Overview, Objectives, and Goals
Lesson 2: Journey through the INFORMS Project
Lesson 3: INFORMS Training Overview
Lesson 4: Post Go-Live Support (Strategic Business Management)

Lesson 1: INFORMS Overview, Objectives, and Goals

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

Lesson 1: Key Terms

| Term	Definition
Enterprise Resource Planning (ERP)	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.
Human Capital Management	This is the Human Resources and Payroll functions of INFORMS
IT Systems	All electronic data processing, information, recordkeeping, communications, and other computer systems.
Oracle Business Intelligence Analytics (OBIA)	Data analytics software for dashboards and reports
PeopleSoft	ERP software product packages for Finance, Human Capital Management, Supply Chain Management.
Supply Chain Management	This is the procurement function of INFORMS

Lesson 1: INFORMS Overview, Objectives, and Goals

- **INFORMS** stands for **IN**tegrated **F**inancial **R**esources **M**anagement **S**ystem

- **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.

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Lesson 1: INFORMS Overview, Objectives, and Goals

- 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

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Lesson 1: INFORMS Overview, Objectives, and Goals
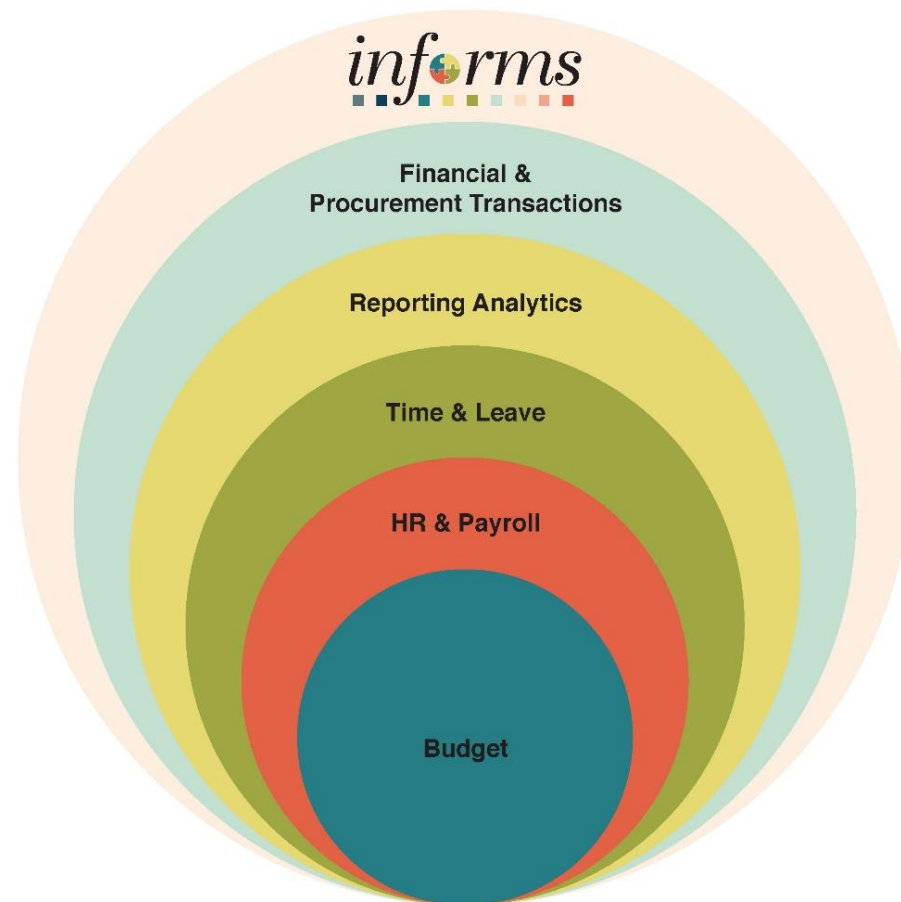
Lesson 2: Journey through the INFORMS Project

- Understand the Journey through the INFORMS Project

Lesson 2: Journey through the INFORMS Project

- The current financial and administrative systems, FAMIS and ADPICS, have reached the end of their useful life. We have 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: INFORMS Training Overview

- Understand all INFORMS training courses

- 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 Miami-Dade County and the INFORMS Project have made a wide variety of training resources available to Users outside the classroom

Lesson 3: 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.

Lesson 3: INFORMS Training Overview

Course ID	Course Name	Description
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.
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

Lesson 3: INFORMS Training Overview

Course ID	Course Name	Description
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.

Lesson 3: INFORMS Training Overview

Course ID	Course Name	Description
FIN 210	Create and Amend Contracts	This course provides an overview and hands-on lessons on creating and amending contracts.
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

Lesson 3: INFORMS Training Overview

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

Lesson 3: INFORMS Training Overview

Course ID	Course Name	Description
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)

- As the 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 the software vendors to ensure resolution to the tickets.

Module 2: Overview of ERP Summary

Module Topics
Module Introduction
Lesson 1: INFORMS Overview, Objectives, and Goals
Lesson 2: Journey through the INFORMS Project
Lesson 3: INFORMS Training Overview
Lesson 4: Post Go-Live Support (Strategic Business Management)

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

- The INFORMS Project Training

- Post Go-Live Support (Strategic Business Management)

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

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

ERP 101 – Overview of INFORMS