

Course ID: HCM 101

Course: Human Resources Fundamentals

Training will start @ 10:40

# 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: HR Fundamentals
  - Introduction to Human Resources in INFORMS
  - Key Process Changes
  - Integration points between Human Resources and other INFORMS modules
  - HR End-to-End processes
  - Reports & Queries
- Module 3: Course Summary

# Course Overview, Continued

<b>Training Audiences</b>	<ul style="list-style-type: none"><li>• Department Personnel Representative (DPR)</li><li>• Manager</li></ul>
<b>Prerequisites</b>	<ul style="list-style-type: none"><li>• ERP 101 – Overview of INFORMS</li><li>• ERP 102 – INFORMS Navigation and Online Help</li></ul>
<b>Estimated Duration</b>	<ul style="list-style-type: none"><li>• 3 Hours</li></ul>

# Module 1: HR Fundamentals

## Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

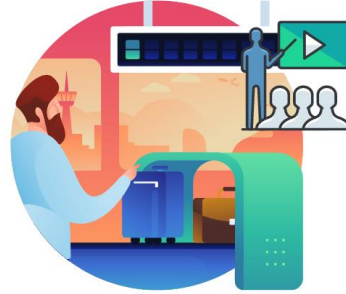
Purpose and Benefits of the Business Process

End-to-End Business Process

# 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



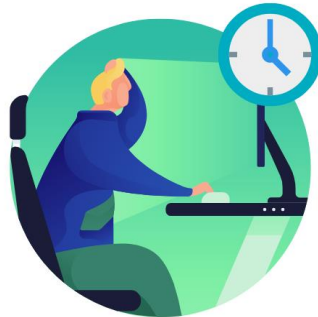
Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

# Learning Objectives

- 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

# Roles and Responsibilities

Role	Responsibilities
<b>Department Personnel Representatives (DPR)</b>	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self-Service transactions.
<b>Manager</b>	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.

# Purpose and Benefits to Business Process

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

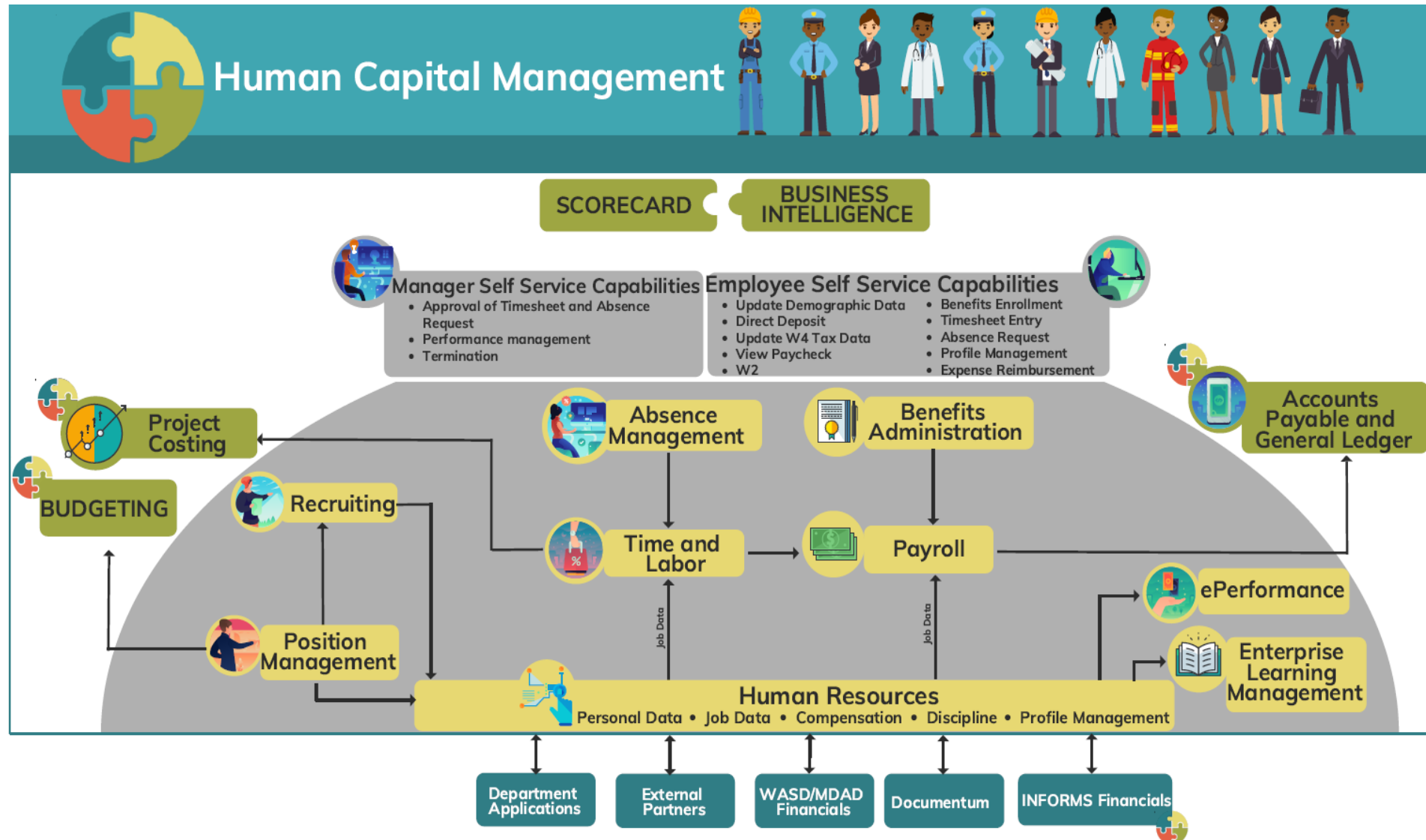
- Reduce paper processes (Electronic workflows)
- Employee Empowerment (Employee Self-Service and Manager Self-Service)
- Reduction of processing time
- Recruit to Hire to Paycheck is completed in one system



# Purpose and Benefits to Business Process, Continued

- 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

# End-to-End Business Process

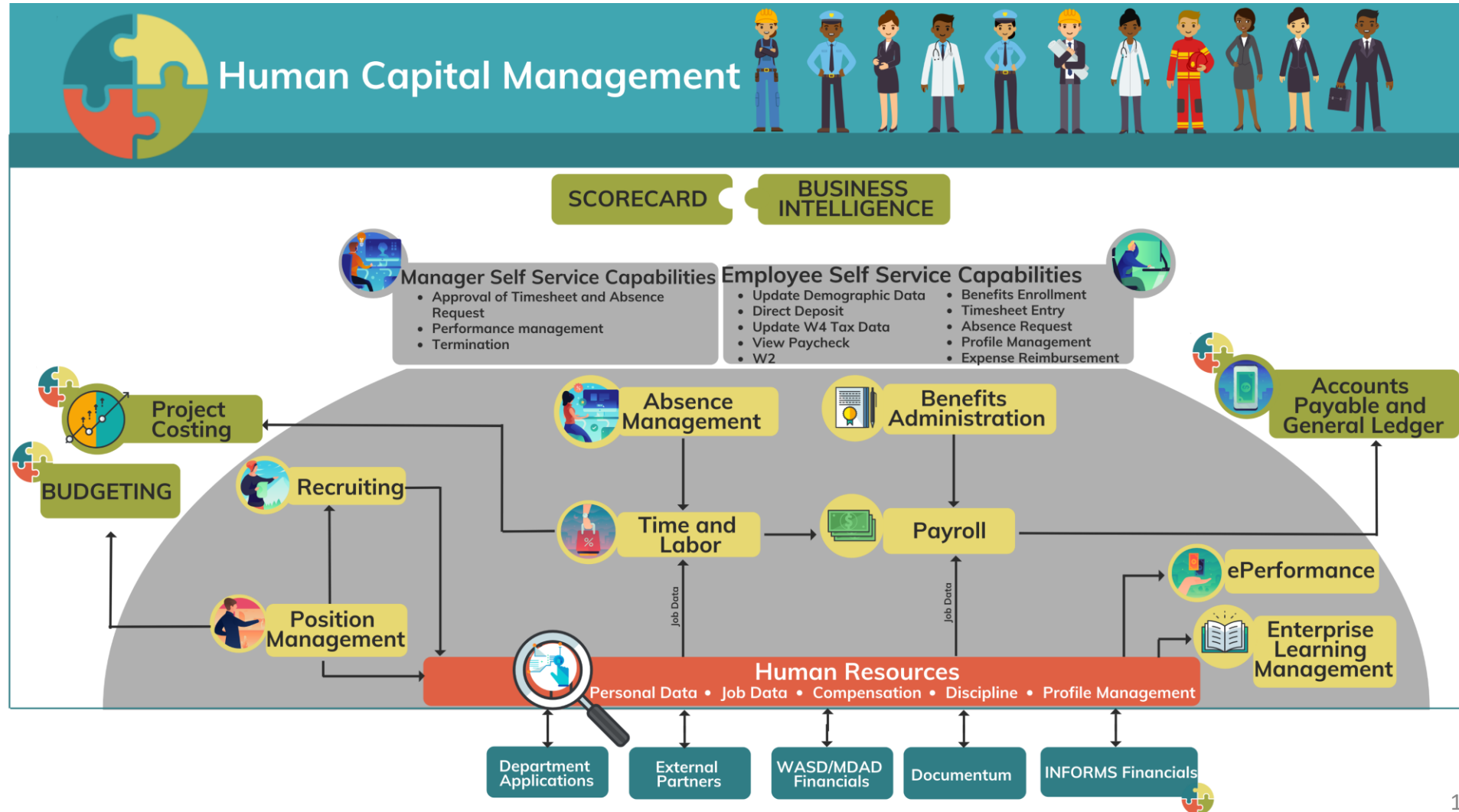


# Lesson 1: Introduction to Human Resources in INFORMS

At the conclusion of this lesson, 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

# Lesson 1: Introduction to Human Resources in INFORMS, Continued



# Lesson 1: Key Terms

Term	Definition
<b>Human Capital Management (HCM)</b>	Human Capital Management is the PeopleSoft suite of applications that includes modules such as HR, Payroll, Benefits, Time and Labor, Absence Management, TAM, among others
<b>Human Resource (HR)</b>	PeopleSoft 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, Continued

Module	Functionality
<b>Absence Management</b>	Tracks employee 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 (EFT) 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).

# Lesson 1: Introduction to Human Resources in INFORMS, Continued

Module	Functionality
<b>ePerformance</b>	This module will allow departments to conduct, track, store, and transfer evaluations; align their performance management process to the enterprise 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.
<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.

# Lesson 1: Introduction to Human Resources in INFORMS, Continued

Module	Functionality
<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.
<b>Talent Acquisition Management</b>	Talent Acquisition Management (TAM) is an INFORMS solution for candidates, recruiters and managers. Used for recruiting processing allowing employees and external candidates to search, view and apply for jobs online.



# Lesson 1: Introduction to Human Resources in INFORMS, Continued



**Note:** 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:

# Lesson 1: Introduction to Human Resources in INFORMS, Continued

- **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.

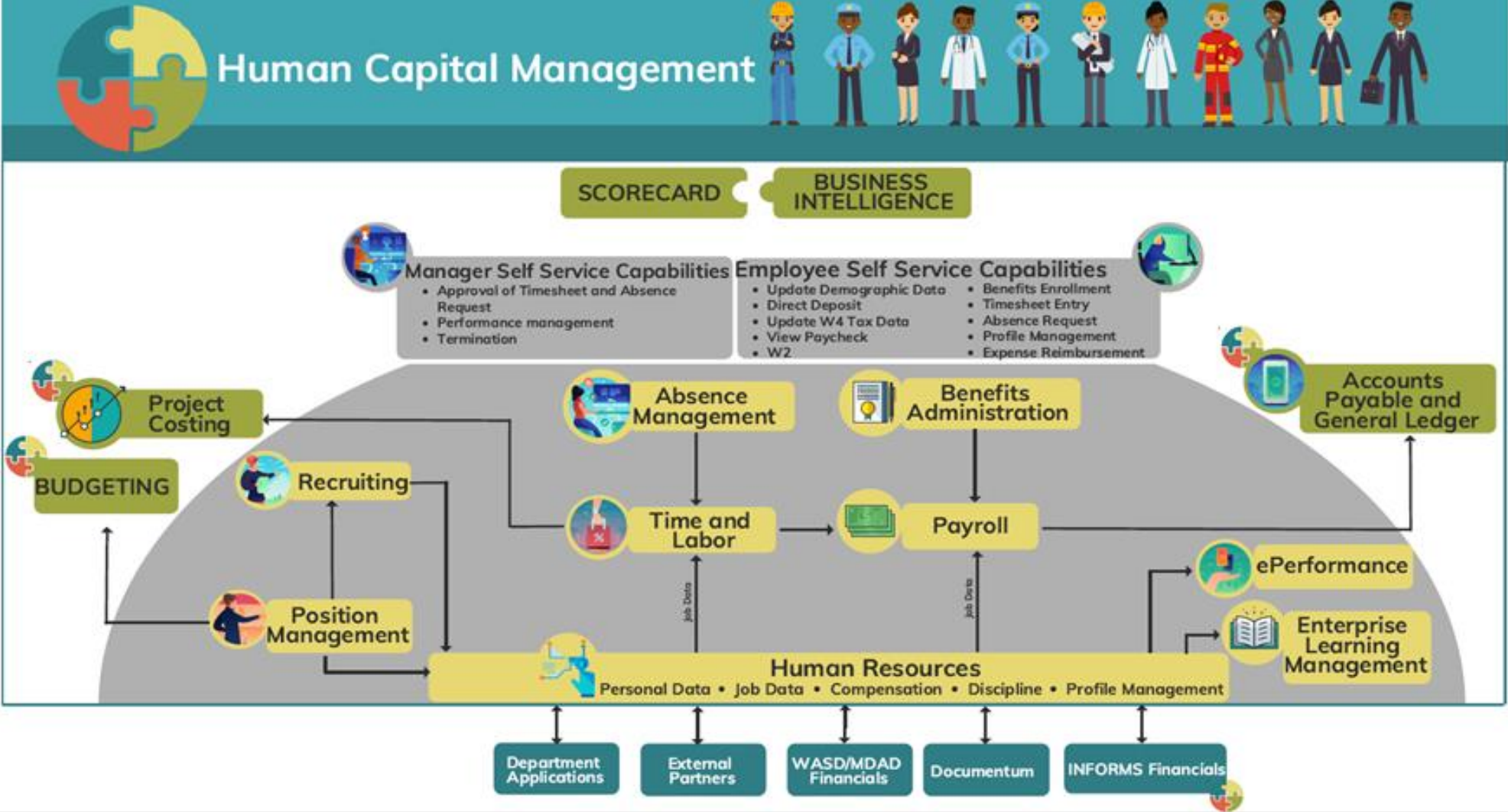
# Lesson 1: Lesson Summary

- 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

- 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: Key Terms

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>	Benefits Processing provides departments the necessary tools to manage employee benefit programs.
<b>Time and Absence</b>	Time and Absence enables department users to manage time reporter data and schedules, review and approve absence request and time submission and manage exceptions.

# Lesson 2: Key Terms, Continued

Term	Definition
<b>Payroll Processing</b>	The Payroll processing receives the processed data from Time and Labor to produce earnings and track deductions and garnishments. It provides 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

The **Hire to Pay** Business Process is composed of different business areas. These business areas contain key changes which impact 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



# Lesson 2: Key Process Changes, Continued

## 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's approval)
  - Departments can work with Central HR for enhanced screening
- Additional statuses for better applicant tracking

# Lesson 2: Key Process Changes, Continued

## 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 the PCD

# Lesson 2: Key Process Changes, Continued

## Benefits Processing

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

# Lesson 2: Key Process Changes, Continued

## 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

# Lesson 2: Key Process Changes, Continued

## 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

# Lesson 2: Key Process Changes, Continued

## Payroll Processing, Continued

- Payroll edits (e.g., adding one-time deduction payment to employee's paycheck).
- Self-Service:
  - Paystub (PDF paycheck)

# Lesson 2: Key Process Changes, Continued

## 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

# Lesson 2: Key Process Changes, Continued

- 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, Continued

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

## Department Personnel Representative (DPR) Salary Change

- Paperless
- Effective Date (will trigger Retro Pay if the transaction is retroactive)
- Additional Components of Pay

# Lesson 2: Key Process Changes, Continued

## Department Personnel Representative (DPR) Salary Change, Continued

- 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

# Lesson 2: Key Process Changes, Continued

## 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

# Lesson 2: Key Process Changes, Continued

## 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, Continued

The **Time and Absence** Business Process is composed of different business areas. These business areas contain key changes which impact 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 to the effective date

# Lesson 2: Key Process Changes, Continued

## Time Reporter Data

- Required Time Reporter Data:
  - Effective Date
  - Time Reporter Type
  - Elapsed Time Template
  - Punch Time Template
  - Workgroup
  - Taskgroup

# Lesson 2: Key Process Changes, Continued

## Absence Request and Approval

- Paperless Absence Request and Approval
- Employees can request future dated absence
- Eligibility is validated upon request
- Sick Conversion Waiver and/or Payouts can be requested online
- Ability to add Attachments for all Absences Requests

# Lesson 2: 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

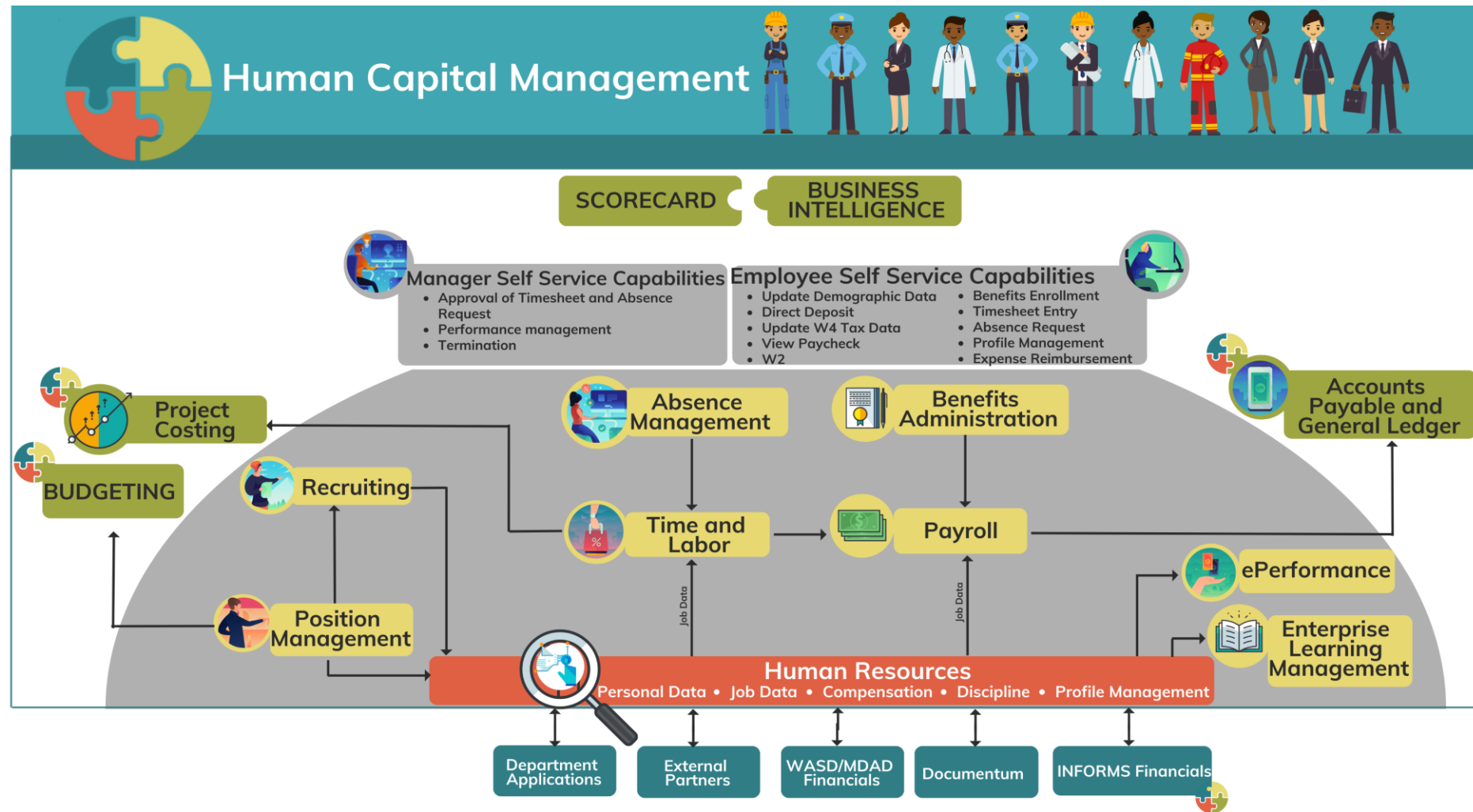


# Lesson 3: Integration points between Human Resources and other INFORMS Modules

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

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

# Lesson 3: Integration points between Human Resources and other INFORMS Modules



# Lesson 3: Key Terms

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 than 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 Countywide Financials and Supply Chain system that provide and receive HCM data.

# Lesson 3: Integration points between Human Resources and other INFORMS Modules

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.

# Lesson 3: Integration points between Human Resources and other INFORMS Modules

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, e.g. 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: Lesson Summary

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

# Lesson 4: HR End-to-End Processes

- 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, Continued

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

Submit Chart of Account request to INFORMS Finance



Create Combo Code in Human Capital Management



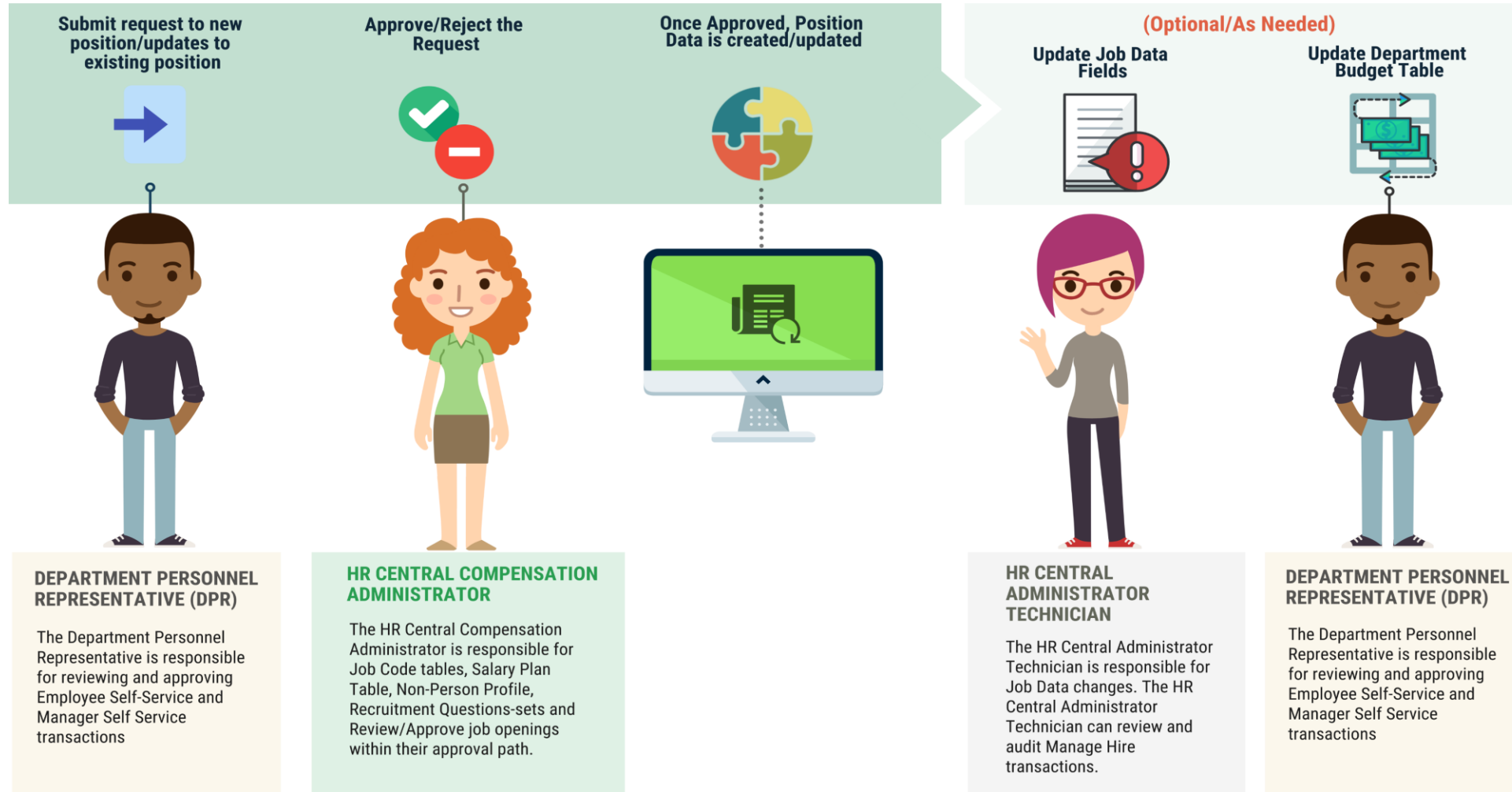
Enter default combo code in Department Budget Table





# Lesson 4: HR End-to-End Processes, Continued

## POSITION MANAGEMENT APPROVAL BUSINESS PROCESS



### DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)

The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions

### HR CENTRAL COMPENSATION ADMINISTRATOR

The HR Central Compensation Administrator is responsible for Job Code tables, Salary Plan Table, Non-Person Profile, Recruitment Questions-sets and Review/Approve job openings within their approval path.

### HR CENTRAL ADMINISTRATOR TECHNICIAN

The HR Central Administrator Technician is responsible for Job Data changes. The HR Central Administrator Technician can review and audit Manage Hire transactions.

### DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)

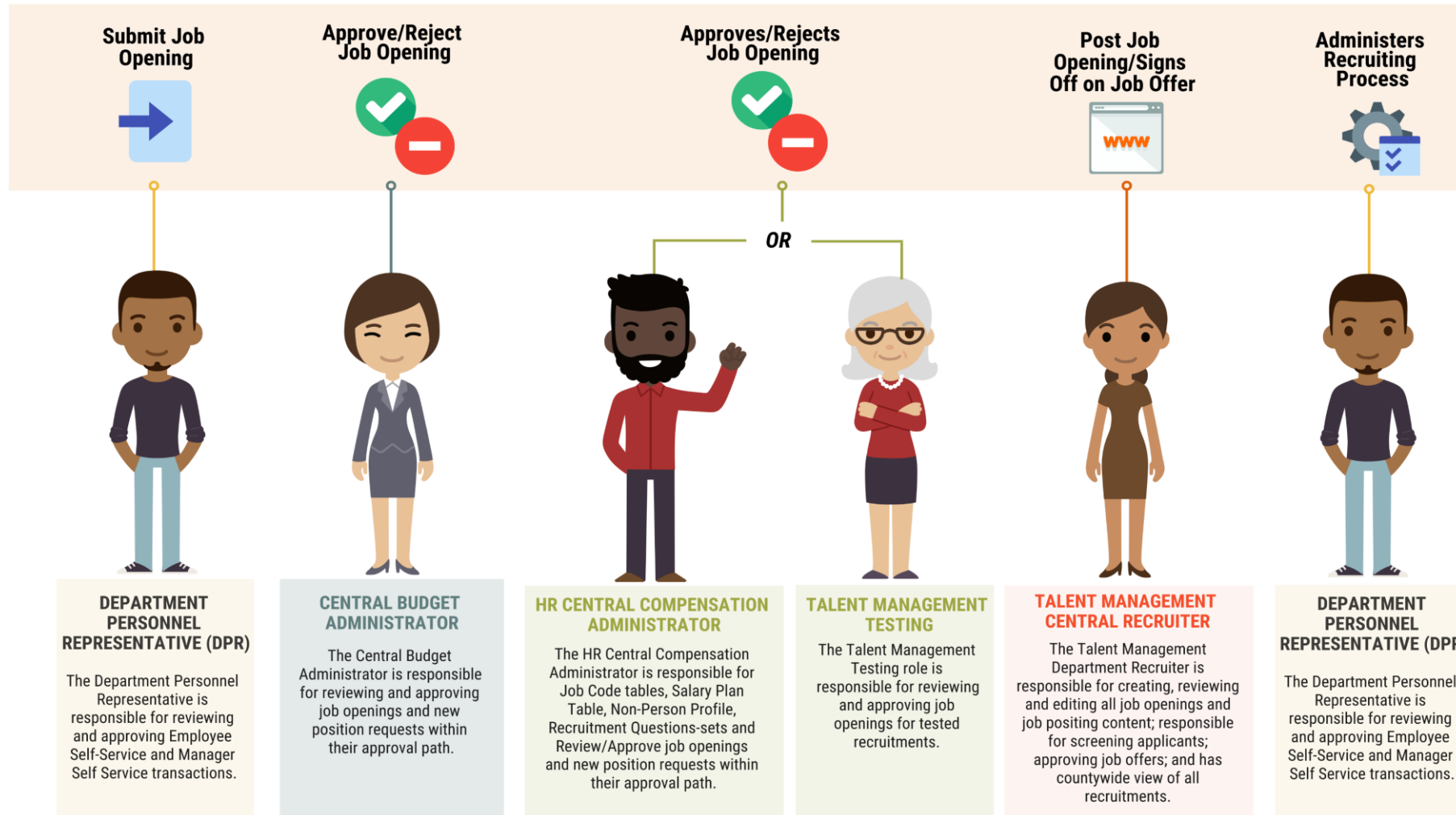
The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions

# Lesson 4: HR End-to-End Processes, Continued

- Once the position is created and fully approved, external and/or internal candidates can see the job posting
- The information gathered from the job posting is stored in Human Resources (HR)
- The information gathered is utilized by other business areas, partners, and modules within INFORMS

# Lesson 4: HR End-to-End Processes, Continued

## RECRUITING BUSINESS PROCESS

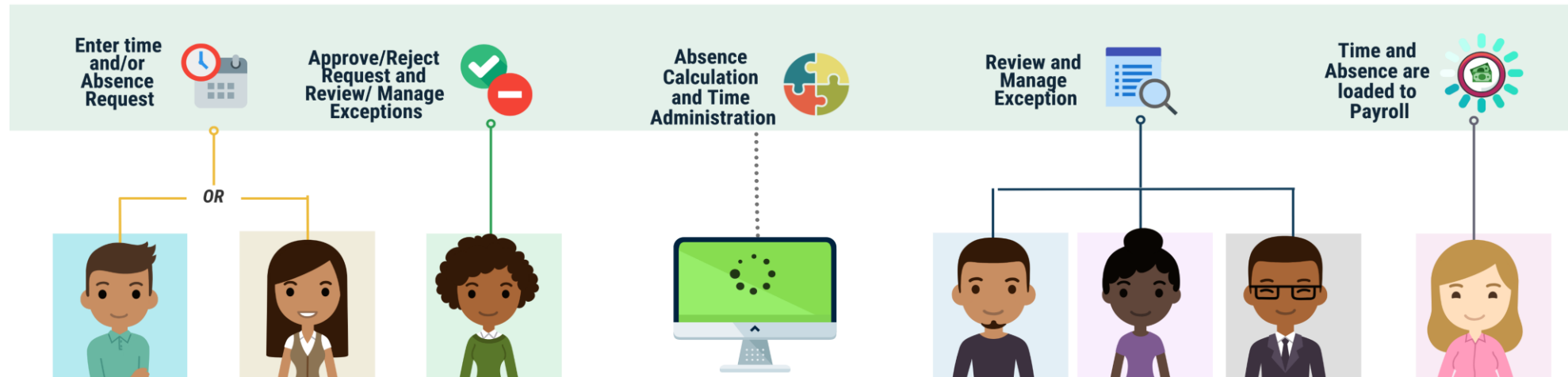


# Lesson 4: HR End-to-End Processes, Continued




- 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.

# Lesson 4: HR End-to-End Processes, Continued

## TIME AND ABSENCE APPROVAL BUSINESS PROCESS



### Roles and Descriptions

 <p><b>EMPLOYEE</b></p> <p>The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).</p>	 <p><b>TIMEKEEPER</b></p> <p>The Timekeeper is responsible for keeping time and attendance at the department level; ensure completeness and accuracy of time; and managing exceptions.</p>	 <p><b>MANAGER</b></p> <p>The Manager is responsible for reviewing and approving HCM Module transaction types (Time &amp; Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.</p>	 <p><b>DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)</b></p> <p>The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.</p>	 <p><b>TIME AND LABOR CENTRAL ADMINISTRATOR</b></p> <p>The Time and Labor Central Administrator is responsible in accessing all Miami-Dade County employees, configure Time &amp; Labor elements and run time administration process.</p>	 <p><b>ABSENCE MANAGEMENT CENTRAL ADMINISTRATOR</b></p> <p>The Absence Management Central Administrator is responsible for all Miami-Dade County employees, configure absence elements and run absence processes.</p>	 <p><b>PAYROLL CENTRAL ADMINISTRATOR</b></p> <p>The Payroll Central Administrator is responsible for running payroll all the way to Final Calc. and is able to view and update employee pay data.</p>
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# Lesson 4: HR End-to-End Processes, Continued

- 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, Continued

## PAYROLL BUSINESS PROCESS



### PAYROLL CENTRAL ADMINISTRATOR

The Payroll Central Administrator is responsible for running payroll all the way to Final Calc. and is able to view and update employee pay data.

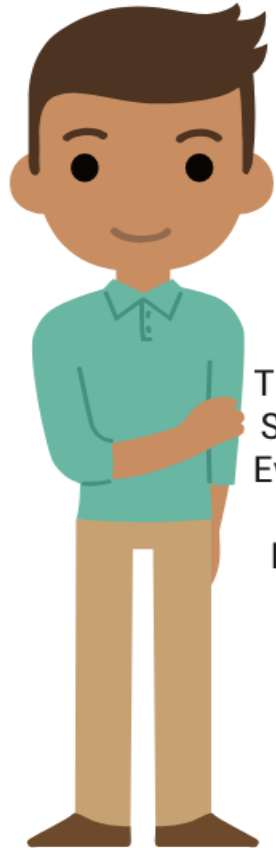
# Lesson 4: HR End-to-End Processes, Continued

- 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, Continued

## BENEFITS BUSINESS PROCESS



### EMPLOYEE

The Employee is responsible for Self-Service functions (i.e., Life Events, Enter Elections, Benefits enrollment, Timesheets, Paycheck, W-2, Direct Deposit)



**Attend the Onboarding Process**



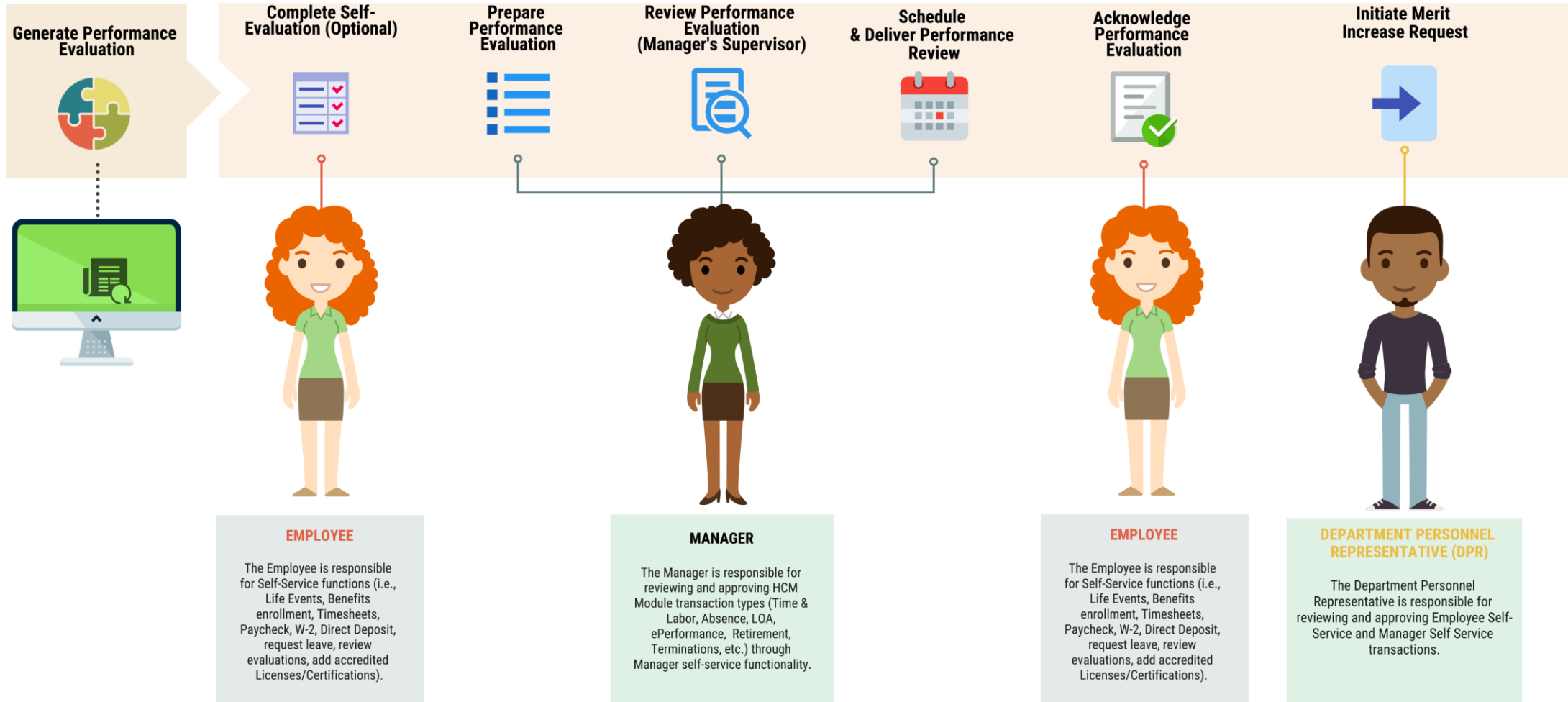
**Enroll into Eligible Benefits Plans**

# Lesson 4: HR End-to-End Processes, Continued

- 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, Continued

## PERFORMANCE REVIEW BUSINESS PROCESS



# Lesson 4: HR End-to-End Processes, Continued

- To maintain employee's 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

- 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

## Module Topics

Module Introduction

Lesson 1: How to run reports in INFORMS

Lesson 2: How to run Queries in INFORMS

Lesson 3: INFORMS BI Publisher Reporting

Lesson 4: Pivot Grid

# Lesson 5: Introduction to Reports & Queries

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

- Run reports in INFORMS
- Use the Report Manager
- Know the basics of Query Reporting
- Run a pre-defined Query
- Run Business Intelligence (BI) Publisher Reports
- Run Pivot Grid Reports

# Lesson 5: 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 user 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 user runs a report, they create and save a run control with those settings. The next time they run the report, they select the run control, and the system fills in the settings.



# Lesson 5: Key Terms, Continued

Term	Definition
<b>INFORMS Inquiry</b>	INFORMS pages within each module allow the user to look up existing information.
<b>INFORMS Query</b>	Run pre-defined specific queries to extract precise information.
<b>Pivot Grid</b>	INFORMS Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table and chart representation of data using INFORMS Query, Composite Query, and component data source. The framework also enables user 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.
<b>XML</b>	Extensible Markup Language. This is used to define data to dictate how they are represented online.

# Lesson 5: Key Terms, Continued

Term	Definition
<b>BI Publisher (XML Publisher)</b>	BI Publisher for INFORMS provides an environment for the power business user to manage templates, data sources, reports, translations, content components, and to produce reports according to a user-defined criteria. BI Publisher for INFORMS also can burst reports, such as annual wage statements for employees, electronically.
<b>Data Source</b>	Is the location where the data used by the tool comes from. In the case of Pivot Grids and BI Publishers, it is usually INFORMS Query.

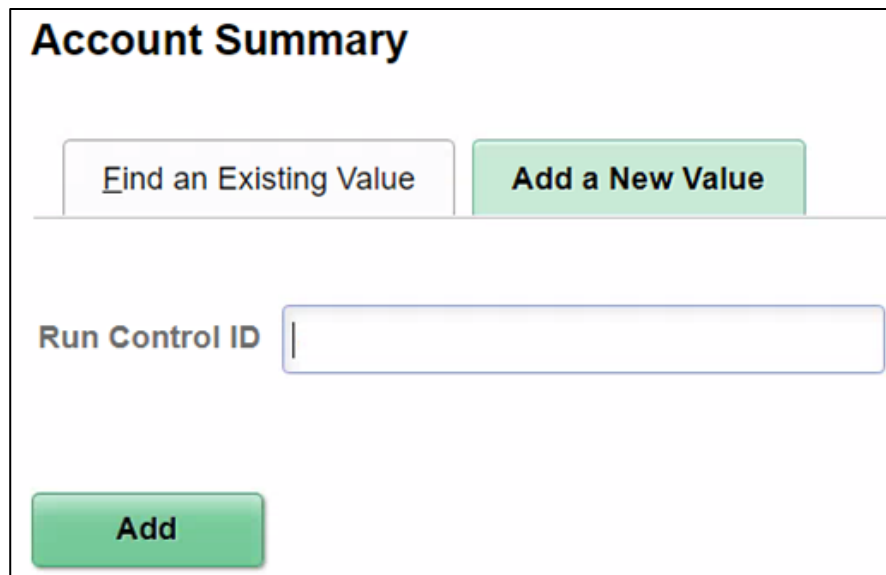
# Lesson 5: Reports & Queries

## Reports

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

# Lesson 5: Reports & Queries, Continued

**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.

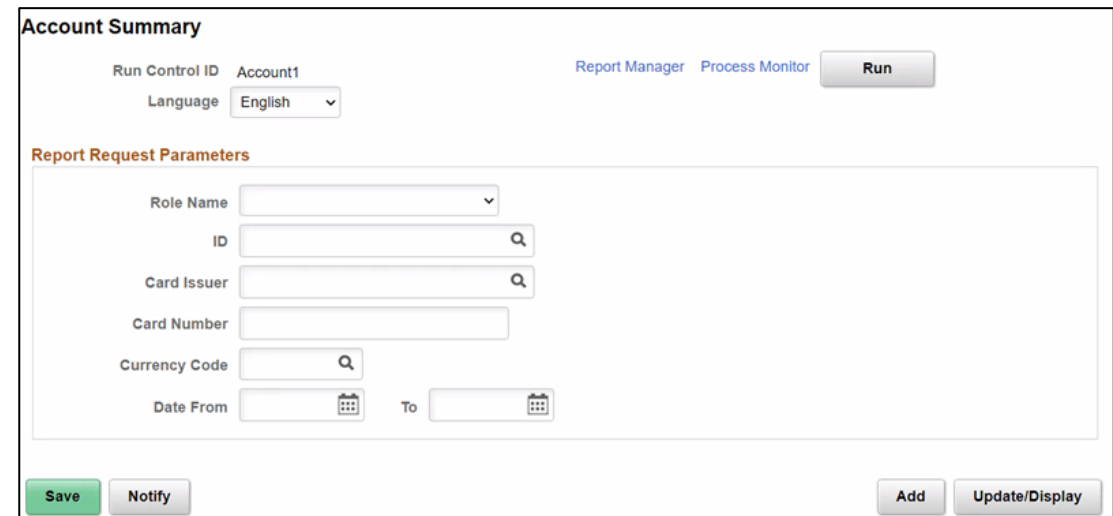


**Account Summary**

Find an Existing Value **Add a New Value**

Run Control ID

**Add**



**Account Summary** [Report Manager](#) [Process Monitor](#) **Run**

Run Control ID Account1  
Language English

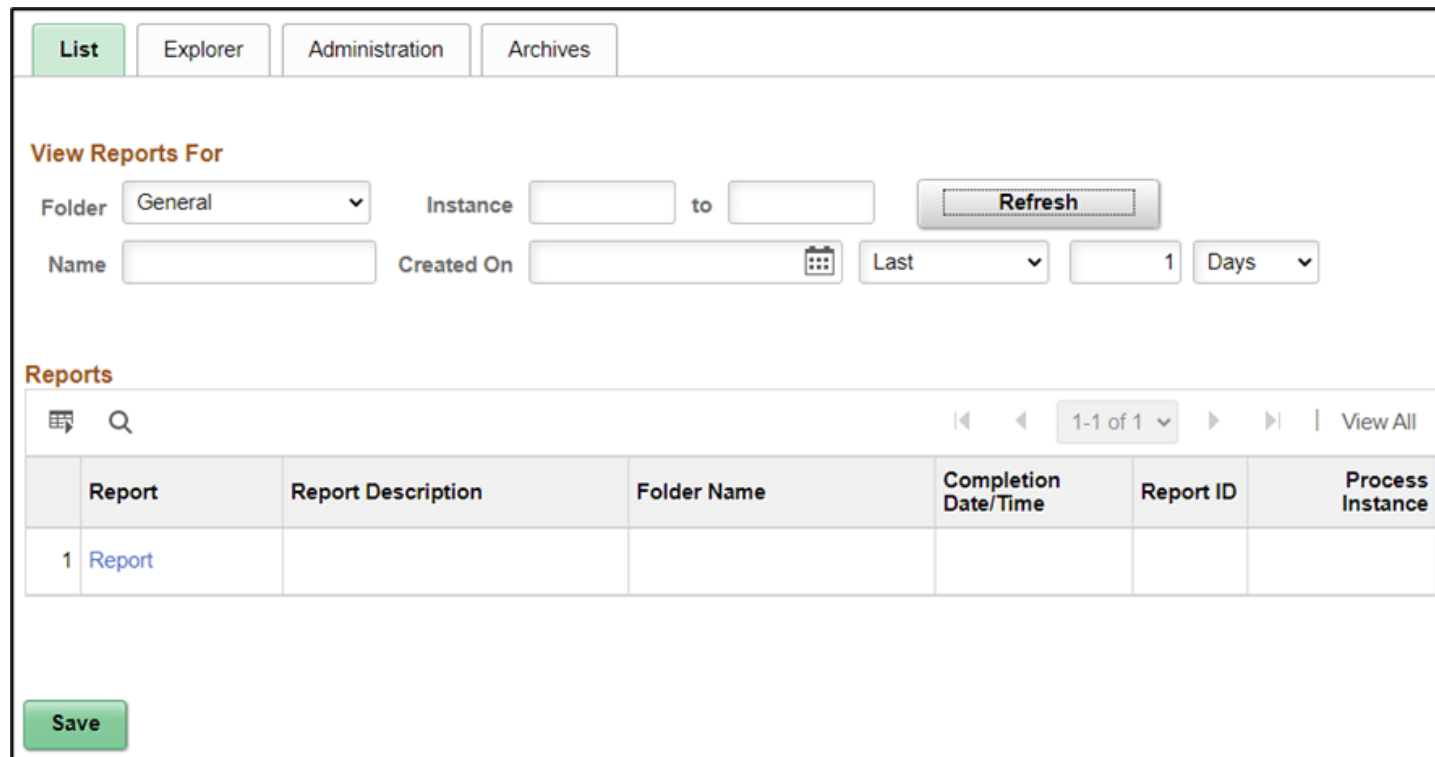
**Report Request Parameters**

Role Name   
ID   
Card Issuer   
Card Number   
Currency Code   
Date From  To

**Save** **Notify** **Add** **Update/Display**

# Lesson 5: Reports & Queries, Continued

The **Report Manager** is part of the INFORMS Process Scheduler and provides a framework for viewing report output based on the user's privileges.



The screenshot displays the Report Manager interface. At the top, there are navigation tabs: List (selected), Explorer, Administration, and Archives. Below the tabs, the 'View Reports For' section includes a 'Folder' dropdown menu set to 'General', an 'Instance' field with a 'to' field, a 'Refresh' button, a 'Name' field, a 'Created On' field with a calendar icon, a 'Last' dropdown menu, a '1' field, and a 'Days' dropdown menu. The 'Reports' section features a search icon, a '1-1 of 1' dropdown menu, and a 'View All' link. Below this is a table with the following columns: Report, Report Description, Folder Name, Completion Date/Time, Report ID, and Process Instance. The table contains one row with the value '1 Report' in the 'Report' column. A 'Save' button is located at the bottom left of the interface.

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 Report					

# Lesson 5: Reports & Queries, Continued

## Query

**INFORMS Query** is an end-user's reporting tool. With INFORMS Query, users can extract the precise information that users are looking for by using visual representations of the INFORMS database, without writing SQL statements.

### Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

[Advanced Search](#)

# Lesson 5: Reports & Queries, Continued

The **Query Viewer Search Results** page can be found by going to **Menu > Navigator > Human Resources (HCM) > Reporting Tools > Query > Query Viewer**

**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

[Advanced Search](#)

**Search Results**

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

\*Folder View

**Query**

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>	Schedule	<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>	Schedule	<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>	Schedule	<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>	Schedule	<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>	Schedule	<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>	Schedule	<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>	Schedule	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

# Lesson 5: Reports & Queries, Continued

## BI Publisher

Like the Query Viewer, **BI Publisher** has a report view page called the Query Report Viewer.

**Query Report Viewer**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search by  begins with

[Advanced Search](#)

Search Results [Show Template Prompts](#)

Report Definition				Personalize	Find	View 100	First	1-30 of 207	Last
Report Name	Description	Data Source Type	Data Source ID	*Format	Burst	View Report			
AFI_BC	AFI Basic Copy	Query	AFI_BC	HTM	N	<a href="#">View Report</a>			
CARTRAIN	Employee Career Training Plan	Query	CARTRAIN	PDF	N	<a href="#">View Report</a>			
EO9030C	Cross Rate Report	Query	EO9030C	PDF	N	<a href="#">View Report</a>			
EO9030R	Reciprocal Rate Report	Query	EO9030R	PDF	N	<a href="#">View Report</a>			
EODS_HIS	Audit Transaction History	Query	EODS_AUDIT_HIST	PDF	N	<a href="#">View Report</a>			
EP_CASCADE	Cascade Objective Items	Query	EPO_CASC_REP	PDF	N	<a href="#">View Report</a>			
FGOCC800	Occupation Series	Query	FGOCC800	PDF	N	<a href="#">View Report</a>			



# Lesson 5: Reports & Queries, Continued

## Pivot Grids

**Pivot Grids** are primarily used to visually represent the results of a data source (INFORMS Query) outside the default tabular form the query results provide.

**Pivot Grid Viewer**

Search Pivot Grids

Pivot Grid Name

Data Source Name

Data Source Type

Show all Views

Pivot Grid Name	Pivot Grid Title	Open in Fluid Mode
<a href="#">ABSENCES</a>	Absences	<input checked="" type="checkbox"/>
<a href="#">ACA_FULL_PART_TIME</a>	ACA Full/ Part Time Status	<input checked="" type="checkbox"/>
<a href="#">ACA_HIRE_REHIRE</a>	ACA New Hire/ Rehire	<input checked="" type="checkbox"/>
<a href="#">ACA_MONTHLY_RPT</a>	ACA Monthly Threshold	<input checked="" type="checkbox"/>
<a href="#">ACA_WEEKLY_RPT</a>	ACA Weekly Threshold	<input checked="" type="checkbox"/>

# Module 2: HR Fundamentals Summary

## Module Topics

Module Introduction

Lesson 1: Introduction to Human Resources in INFORMS

Lesson 2: Key Process Changes

Lesson 3: Integration points between Human Resources and other INFORMS Modules

Lesson 4: HR End-to-End processes

Lesson 5: Reports & Queries

# Module 3: Course Summary

## Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

# Course Content Summary

Congratulations on completing the HR Fundamentals. You now understand:

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

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

# Additional Training and Job Aids

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, be sure to visit:

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



**CONGRATULATIONS**

Congratulations on successfully completing the HR Fundamentals course!

**HCM 101 - Human Resources Fundamentals**