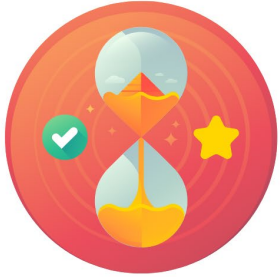


Course ID: SCM 101

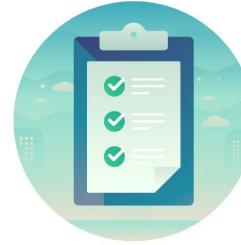
Course: Supply Chain Management Fundamentals

Updated 06-03-2025

Ground Rules



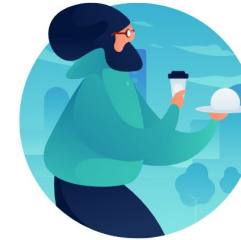
Be on time



Attendance



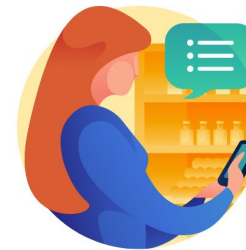
Turn off your cell phones
when in class



Take breaks as needed



Participate actively in
class; refrain from email
and internet use



Feel free to ask questions

Course Overview

| | |
|---------------------------|--|
| Course Description | <p>This course provides a comprehensive review of the Supply Chain Management (SCM) Fundamentals processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none">• Module 1: Course Introduction• Module 2: Supply Chain Management (SCM)• Module 3: Course Summary |
| Training Audiences | <ul style="list-style-type: none">• All INFORMS end-users with SCM Related Roles |
| Prerequisites | <ul style="list-style-type: none">• ERP 101 – Overview of INFORMS• ERP 102 – INFORMS Navigation, Reporting and Online Help |
| Estimated Duration | <ul style="list-style-type: none">• 1.5 Hours |

Course Outline

Content

Module 1: Course Introduction

Module 2: Supply Chain Management (SCM) Fundamentals

Module 3: Course Summary

Module 1: Course Introduction

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Purpose and Benefits

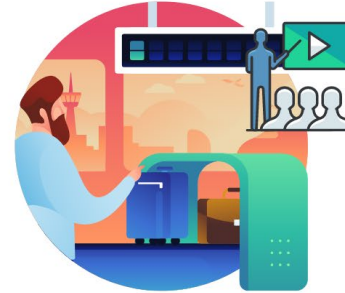
The End-to-End Business Process

Introduction to Activities and Exercises

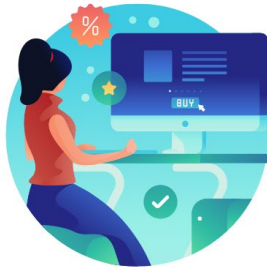
Course Administration and Logistics



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



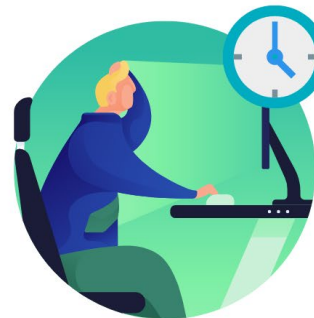
Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

Learning Objectives

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

- Understand the fundamentals of INFORMS Supply Chain Management (SCM)
- Understand the SCM end-to-end processes
- Understand the Integration points between SCM and Finance INFORMS modules

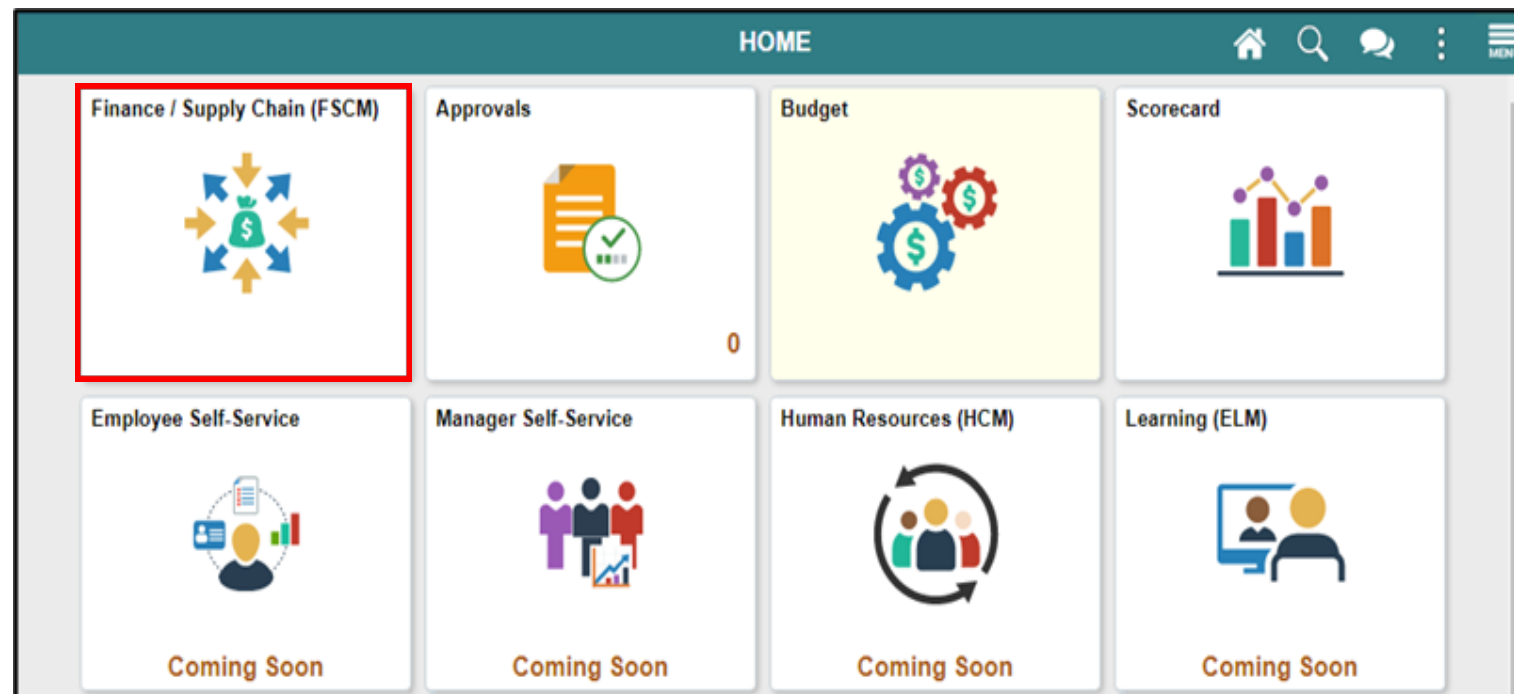
Roles and Responsibilities

The roles and responsibilities associated with this course:

| Role | Responsibilities |
|-----------------|---|
| Employee | All INFORMS end-users with SCM related roles are required to take the SCM 101 – Supply Chain Fundamentals course prior to taking subsequent SCM courses |

Navigation

1. Login to INFORMS and select **Finance/ Supply Chain (FSCM)** from the home landing page below:



Navigation

2. Select Supply Chain Operations.



Purpose and Benefits

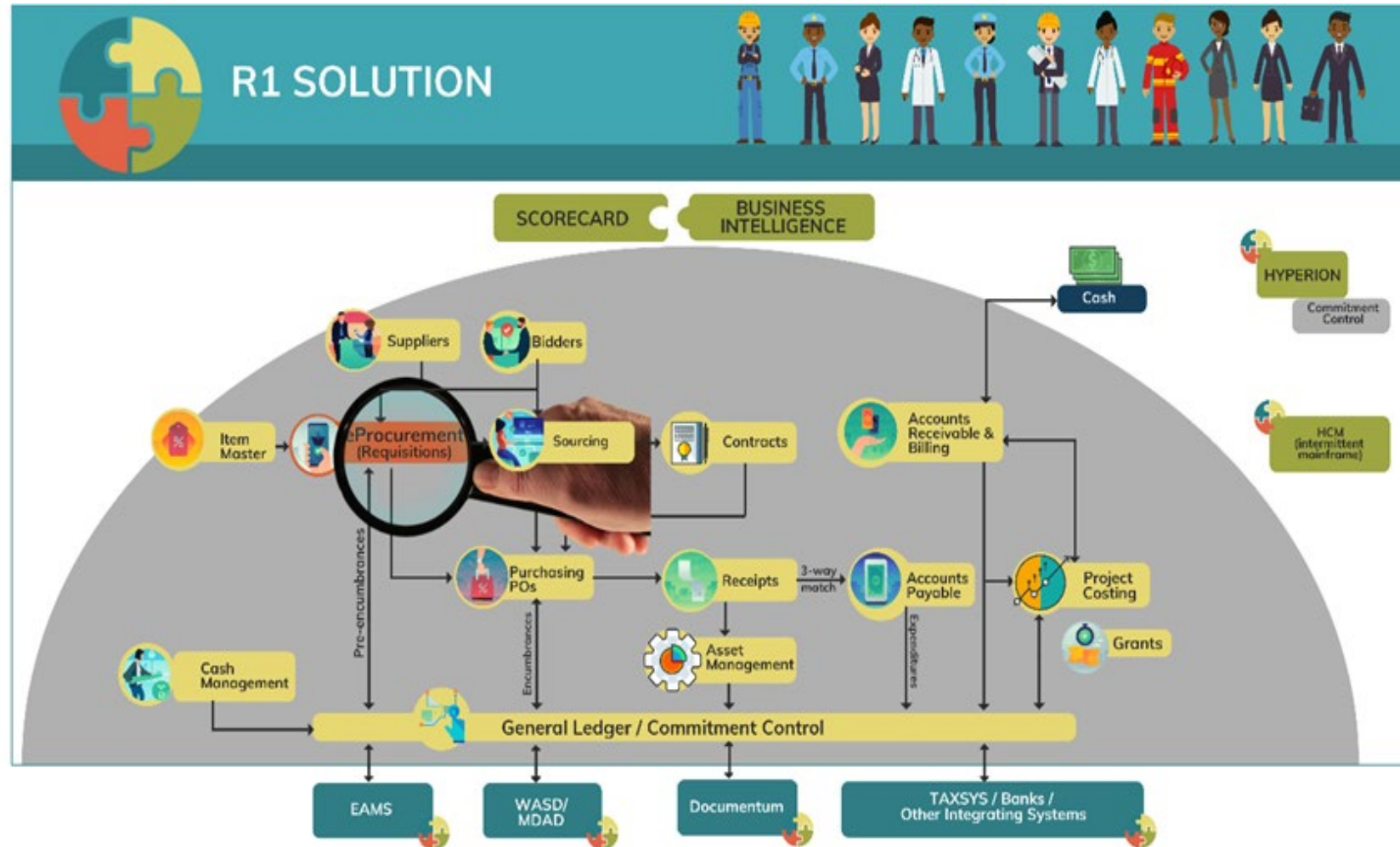
The purpose and benefits of the Supply Chain Management business process include:

- The ability to manage the lifecycle of capital projects and the procurement of goods and services
- Provides the functionality to request, solicit, contract, procure, receive and pay for goods and services

End-to-End Business Process

INFORMS SCM has five main business processes that will be used to procure goods and services for user departments. For an overview of the SCM business processes, let's take a brief look at each of the four SCM modules and their respective business processes.

End-to-End Business Process



Module 2: Supply Chain Management Fundamentals

Module Topics

Module Introduction

Lesson 1: INFORMS SCM Fundamentals

Lesson 2: SCM End-to-End Process

Lesson 3: Integration Points Between SCM and Finance INFORMS Modules

Lesson 1: INFORMS SCM Fundamentals

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

- Understand INFORMS Supply Chain Management (SCM) Fundamentals

Lesson 1: Key Terms

| Term | Definition |
|-----------------------------------|--|
| Bid | A submission of a response to an event |
| Bidder | Organizations that are interested in doing business with the County and interested in responding to solicitations |
| Bind Variable | Variable definitions that enable a user to map source transactional values, such as a purchase order number to content within clauses, sections, and Microsoft Word templates |
| Budget Check | Financial control process that verifies whether a proposed transaction (such as a purchase requisition, purchase order, or payment) is within the limits of the allocated or available budget before it is approved or processed |
| Business Intelligence (BI) | Processes and tools that allows users to collect, analyze and present business data to help their organization make informed decisions |
| Buyer | Employee granted with the INFORMS Department Buyer role allowing them to create, change, source and a purchase order |

Lesson 1: Key Terms

| Term | Definition |
|--------------------------|---|
| Category Contract | Enable a user to create a contract based on a category (NIGP code) of items |
| Collaboration | Optional function that may be used when creating contract documents to share and track edits to documents across internal and external collaborators. |
| Contract | A textual agreement document between the County and the Supplier that establishes an obligation to perform or refrain from performing a specific duty |
| Database | A systematized collection of data that can be accessed immediately and manipulated by a data-processing system for a specific purpose |
| Document Clause | The basic building block for a document, clauses can include the wording for contract terms and conditions that user store, update, and reuse within a document |
| Event Buyer | County/Department end-user that will have the ability to create, analyze, and award sourcing events. |

Lesson 1: Key Terms

| Term | Definition |
|----------------------------|---|
| Fixed Item Contract | Enable a user to create a contract based on specific items referenced on the contract |
| INFORMS Inquiry | INFORMS pages within each module that allow the user to review (lookup) existing information |
| INFORMS Query | Run pre-defined specific queries to extract precise information |
| Inspection | Purchasing transaction entered into the system to denote that received goods have been examined |
| Item | Goods or services purchased from suppliers |
| Item Catalog | Facilitates selection of goods and services maintained in the Item Master table from a catalog during the creation of a requisition |
| Open Item Contract | Enable a user to create a contract which applies to any goods/services that are purchased from the supplier while the contract is in effect |
| PO Close | Process that occurs at the end of the INFORMS Purchasing transaction life cycle |

Lesson 1: Key Terms

| Term | Definition |
|-------------------------------|---|
| PO Dispatch | Process that sends a PO to supplier and allow payments to be transacted against the PO |
| Punch Out | The process of leaving a requisition to access the County catalog to pull the items into a requisition for processing and sourcing to a purchase order |
| Requestor | A user that needs to procure goods or services |
| Requisitioner | Employee granted with the INFORMS Department Buyer Requisition Processor role allowing them to create, change, and cancel a request for goods and/or services |
| Report Manager | Provides a single place where the user can view previously run reports |
| Return to Vendor (RTV) | The process of recording returned goods, usually wrong or defective merchandise, back to the supplier in INFORMS |

Lesson 1: Key Terms

| Term | Definition |
|-----------------------|--|
| RFx Event | RFIs, Simplified Bids, RFBs and RFPs are referred as an “RFx” in INFORMS |
| Run Control ID | 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 |
| Supplier | Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County |

Lesson 1: INFORMS SCM Fundamentals

Supply Chain Modules

- eProcurement
 - Manage Requisitions
- Supplier Contract Center
 - Create Supplier Contracts
 - Approve Supplier Contracts
 - Execute Supplier Contracts
 - Manage Contract Deliverables
 - Amend Supplier Contracts
 - Manage Supplier Contract Standards
- Buyer
 - Manage and Record Purchase Orders
 - Record Receipt of Goods & Services
- Contract/Sourcing
 - Manage Bidders
 - Manage Sourcing
- SCM Integration Across Business Processes

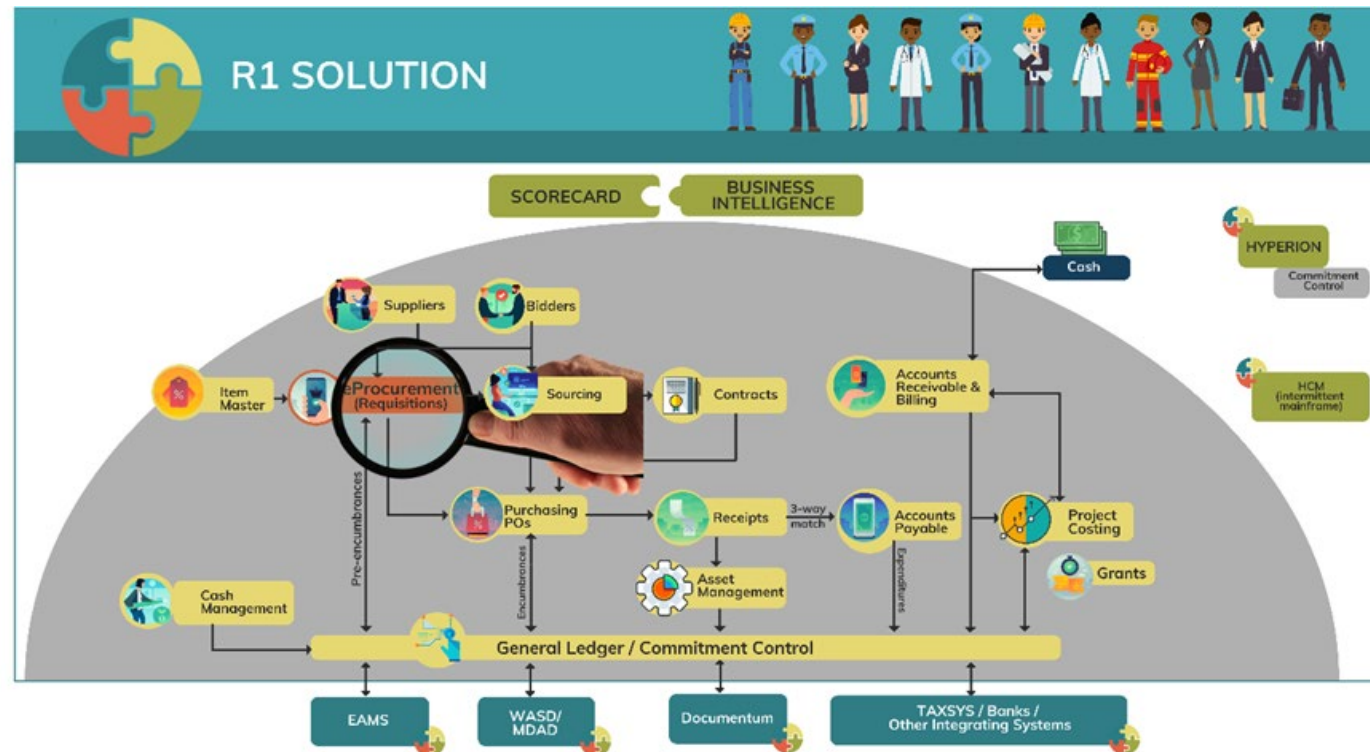
Lesson 1: INFORMS SCM Fundamentals

The chart below summarizes how each of the SCM modules integrate with each other and some of the Finance modules in the INFORMS system.

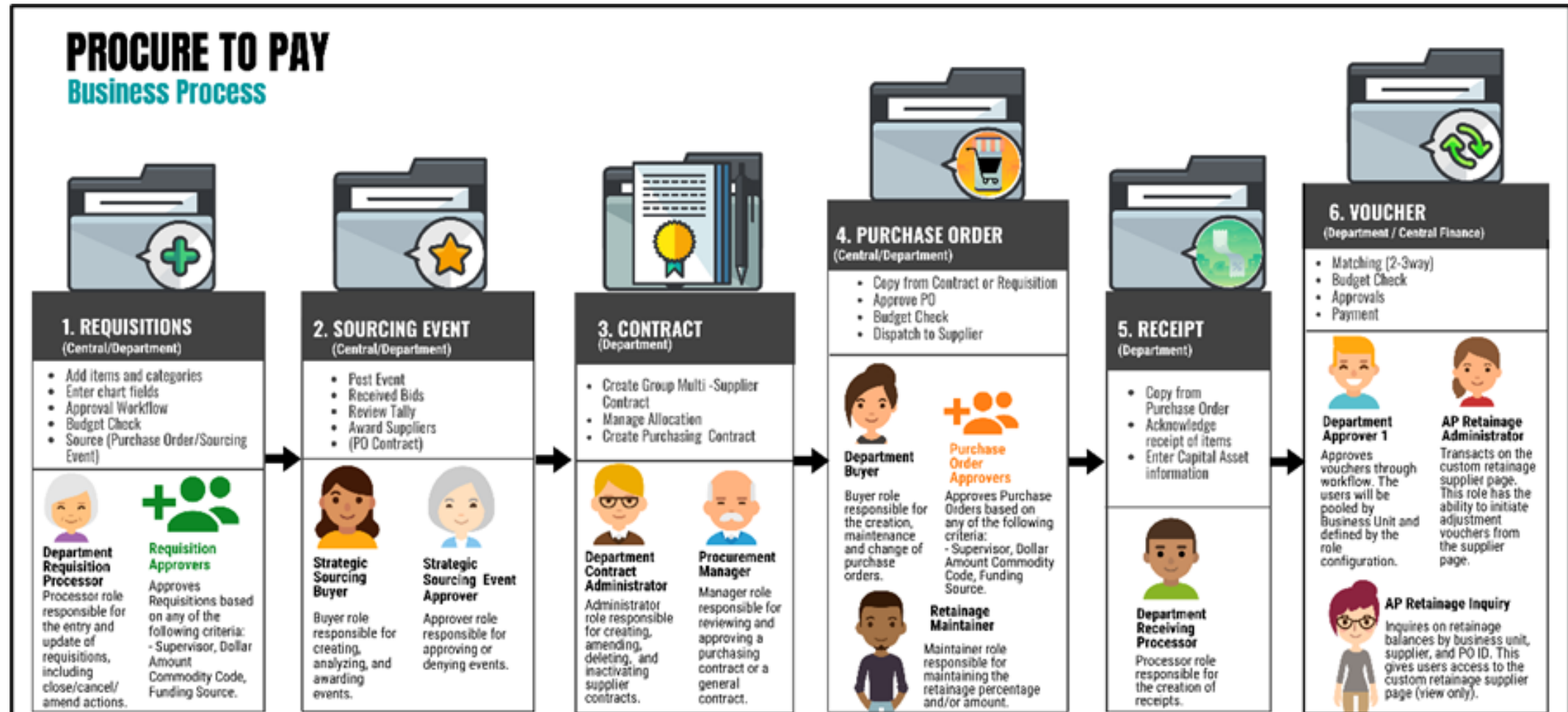
| | ePro | Buyer | SS | SC |
|----------------------------------|------|-------|----|----|
| eProcurement (ePro) | | X | X | |
| Buyer | X | | X | X |
| Contract/Strategic Sourcing (SS) | X | X | | X |
| Supplier Contract Center (SC) | | X | X | |

Lesson 2: SCM End-to-End Process

The SCM modules support the business process of procuring goods and services from suppliers to continue business operations.



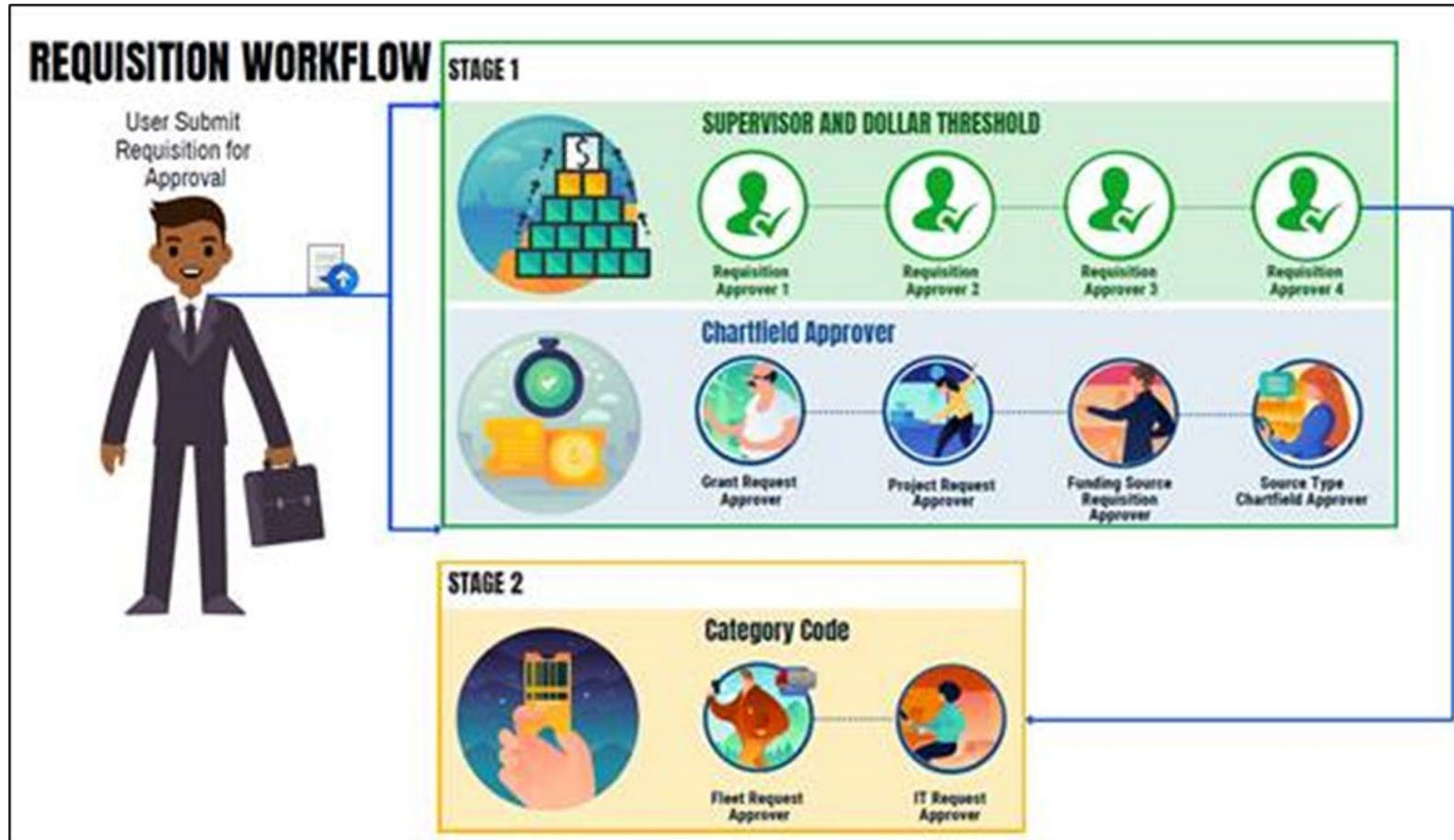
Lesson 2: SCM End-to-End Process



Lecture 1: eProcurement Module

- One system of record for requisitions
- Requisitions are used to define what is needed, when it is needed, and in what quantity
- Having entered, budget checked, and submitted a requisition, it will be routed for approval(s) and then sourced to a purchase order in the INFORMS Purchasing module
- Purchasing users will have the ability to create Purchase Orders directly online either with or without a requisition having been created prior

Lecture 1: eProcurement Module



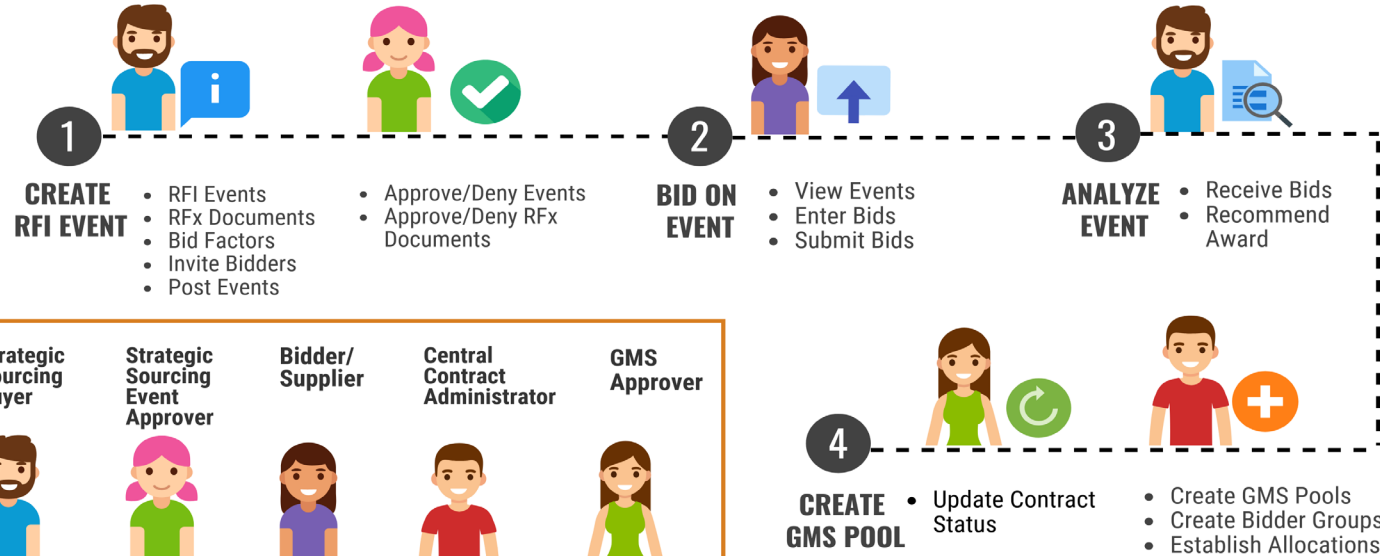
Lecture 2: Strategic Sourcing Module

- Strategic Sourcing facilitates collaboration between procurement professionals and suppliers of goods and services by gathering competitive pricing, analyzing bids, and awarding to the most qualified bidders.
- Strategic Sourcing will assist in standardizing the Request for Information, Simplified Bid, Request for Bid, and Request for Proposal business processes.
- Request for Bids and Request for Proposals are required to be entered in INFORMS while Simplified Bids are optional but recommended.

Lecture 2: Strategic Sourcing Module

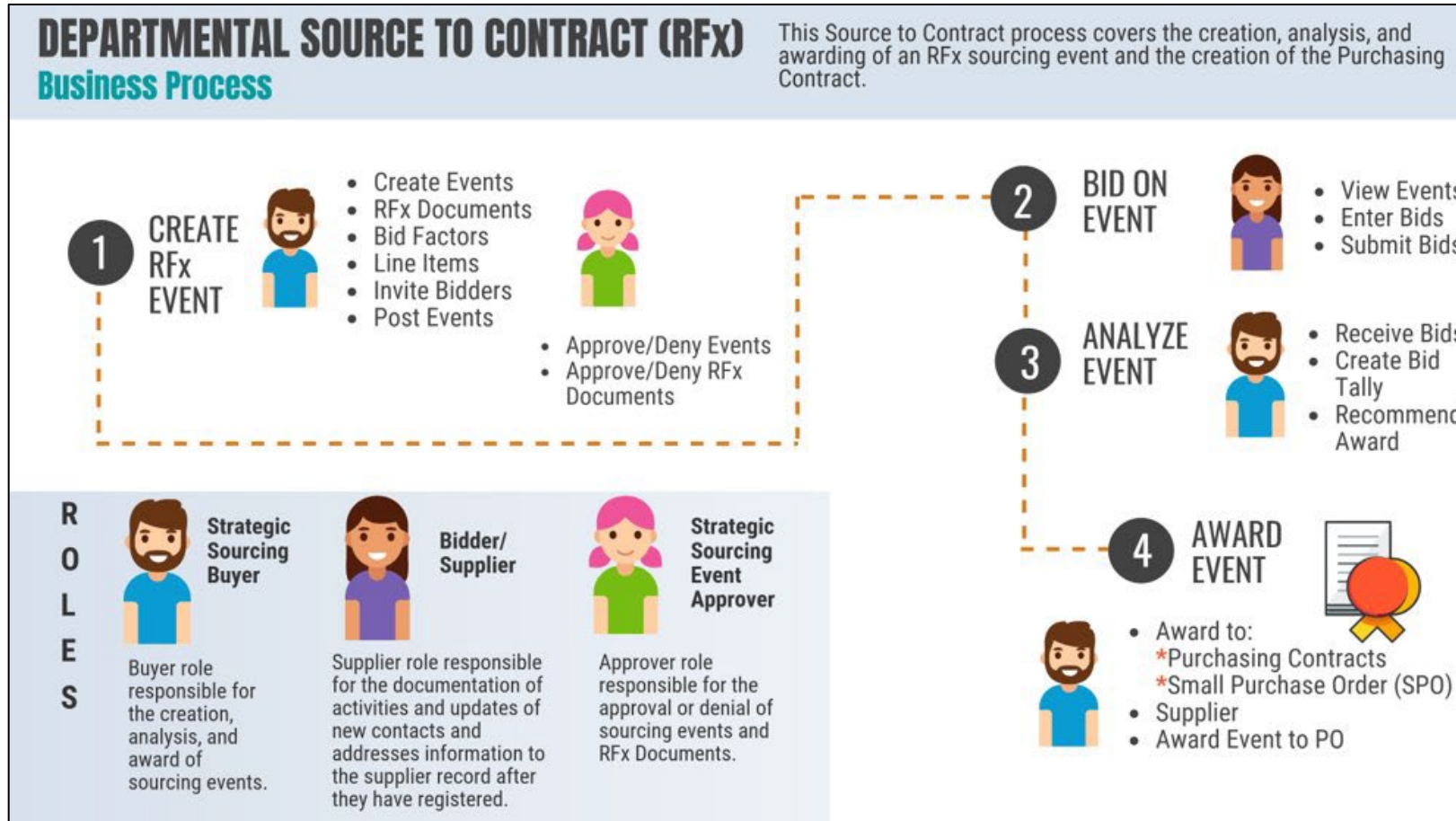
SOURCE TO CONTRACT (RFI) Business Process

This Source to Contract process covers the creation and analysis of a Request for Information (RFI) sourcing event and the creation of the Group Multi Supplier (GMS) Pool.



Lecture 2: Strategic Sourcing Module

Cont'd



Lecture 3: Supplier Contract Management Module

- In many instances before a purchase order is created, a contract is established with a supplier via an awarded sourcing event. In such a case, a Procurement contract is created in the system to capture the contract details to include supplier, start/end dates, contract description, line-item descriptions and pricing.
- Contract can then be referred to as a requisition or a purchase order to associate the purchase directly to a supplier's items or service.
- All Procurement contracts will be created and maintained in INFORMS to provide a centralized tracking tool for all contracts.

Lecture 4: Procurement Reporting Management Module

INFORMS enables users to generate reports for data retrieval, supporting daily operations and real-time decision-making. Reports may be produced directly within INFORMS using current data or through Business Intelligence (BI) tools, which utilize transaction data from previous days.

Lecture 4: Procurement Reporting Management Module Cont'd

Tools within INFORMS regarding reporting:

- **Inquiry pages-** Generate data based on desired search parameters as well as exports the operational data to an Excel spreadsheet
- **Standard reports-** Allows users to view, print, or save the data in the report format
- **Queries-** allow users to extract precise information using visual representations of the data in the INFORMS database

Lecture 4: Procurement Reporting Management Module Cont'd

Inquiry Page

Details

Cancel Requisition

▼ Requisition Summary

Requisition Name Fleet

Business Unit PR

Requisition ID 0000000091

Requisition Date 07/07/2020


Requester MD_PO_DPT_REQUISITION_PRCR

Entered By MD_PO_DPT_REQUISITION_PRCR


Total Amount 12222.00 USD

Request State Pending


▼ Requisition Lifeline




Requisition




Approvals




Inventory




Purchase Orders




Change Request




Receiving



Returns




Invoice



Payment

Lines

| Item Image | Description | Item ID | Ship To | Line State | Quantity | UOM | Price | Total Amount |
|---|--------------------|------------|---------|------------------|----------|------|----------|--------------|
|  | Line 1 - Test Test | PR00000001 | | Pending Approval | 1.0000 | Each | 12222.00 | 12222.00 USD |

Cancel Line

>

Lecture 4: Procurement Reporting Management Module Cont'd

Standard Report

Reports

[Expediting Report](#)

Provides purchase order details such as late days and due date sorted by buyer, supplier, or due dates.

[PO Listing Report](#)

Provides purchase order information sorted by purchase order date, supplier, buyer, or status.

[PO Status Listings](#)

Provides purchase order status information sorted by supplier or item.

[PO Detail Listings](#)

Provides detailed purchase order information sorted by purchase order date, supplier, or buyer.

[PO Schedule Listings](#)

Provides purchase order schedule information such as ship to and due date sorted by purchase order date, supplier, or buyer.

[PO To Requisition Xref](#)

Provides a cross reference between requisitions and the purchase orders created from those requisitions.

[PO Item Category Usage](#)

Provides purchase order item usage information by catalog or supplier.

[Requisition To PO Xref](#)

Provides information about selected requisitions and the purchase orders that were created from them.

[Requisition Costing Summary](#)

Provides GL business unit, account and department information summarized by requisition.

[Requisition Cost Distribution Detail](#)

Provides requisition cost distribution detail by business unit and date range.

[Catalog Item Usage](#)

Provides requisition item usage information for the specified catalog.

Lecture 4: Procurement Reporting Management Module Cont'd

Queries

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

*Folder View

Query

| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Run to XML | Schedule | Definitional References | Add to Favorites |
|------------------------------|--------------------------------|--------|--------|----------------------|-----------------------|---------------------|--------------------------|-----------------------------------|--------------------------|
| MD_APR222_PROCUREMENT_REPORT | For Procurement Card Reports | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |
| MD_EPRO201_ALL_REQUISITIONS | Show all Requisitions | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |
| MD_PO0208_PO_RECEIPT_INQUIRY | PO Receipt Inquiry | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |
| MD_PO0232_ITEM_USAGE_INQ | Item Last Used On A Purchase O | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |
| MD_PO0233_PURCHASE_ORDERS | List All POs based on Date | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |

Lesson 2: Lesson Summary

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

- Understand the details of the SCM modules' end to end processes

Instructor Demonstration



Lesson 3: Integration Points Between SCM and Finance INFORMS Modules

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

- Understand the integration points between SCM and Finance INFORMS modules within Commitment Control, Asset Management, and Project Costing
- Understand the matching process

Lesson 3: Integration Points Between SCM and Finance INFORMS Modules

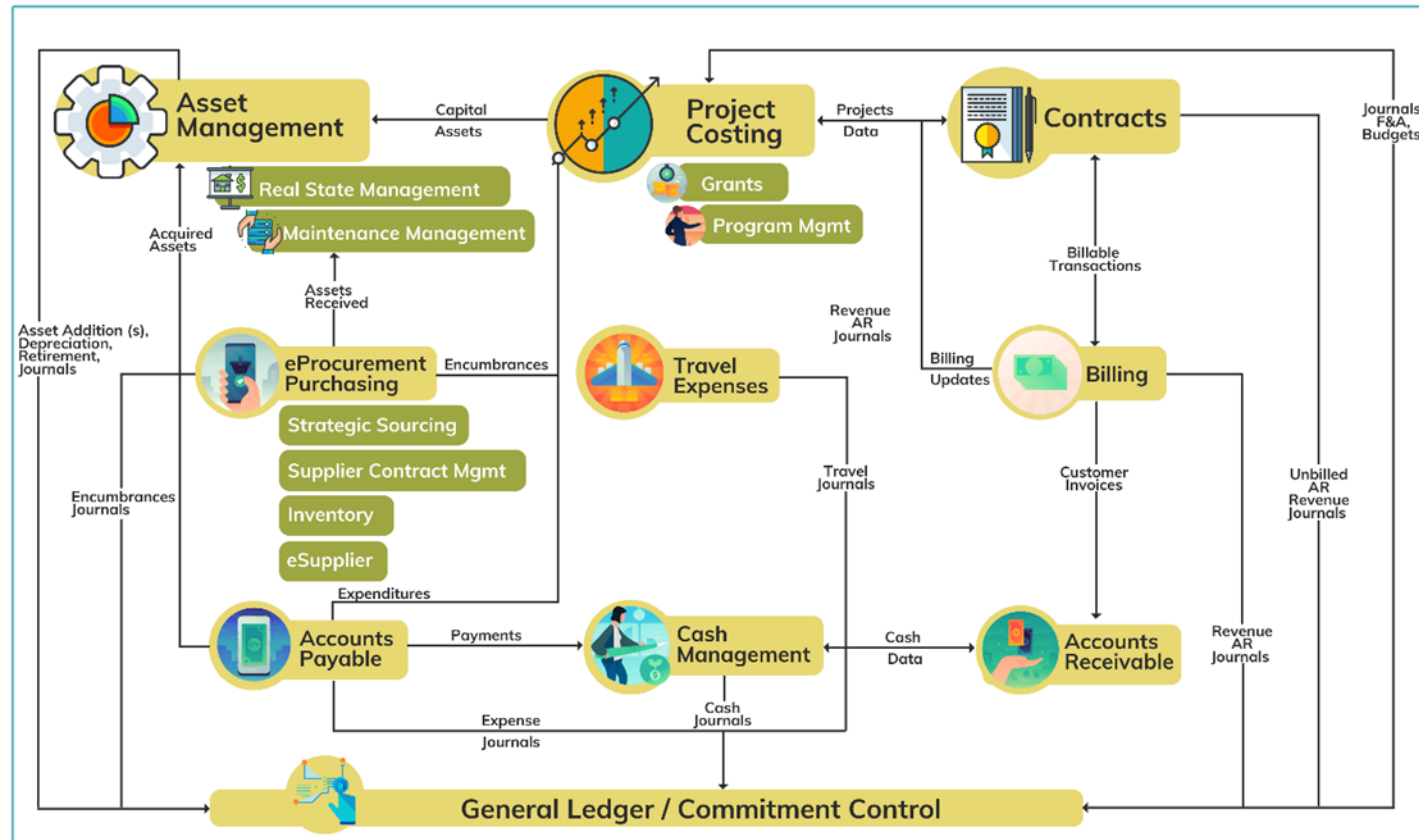
The integration of other INFORMS modules with SCM systems ensures enterprise-wide reporting is both timely and accurate, enhancing overall operational efficiency.

- Other Modules include:
 - Commitment Control
 - Asset Management
 - Project Costing
 - Accounts Payable

Lesson 3: Integration Points Between SCM and Finance INFORMS Modules

| | ePro | PO | INV | SS | SCM |
|--------------------|------|----|-----|----|-----|
| Asset Management | | X | | | |
| Accounts Payable | | X | | | |
| Commitment Control | X | X | | | |
| Project Costing | | X | | | |

Lesson 3: Integration Points Between SCM and Finance INFORMS Modules

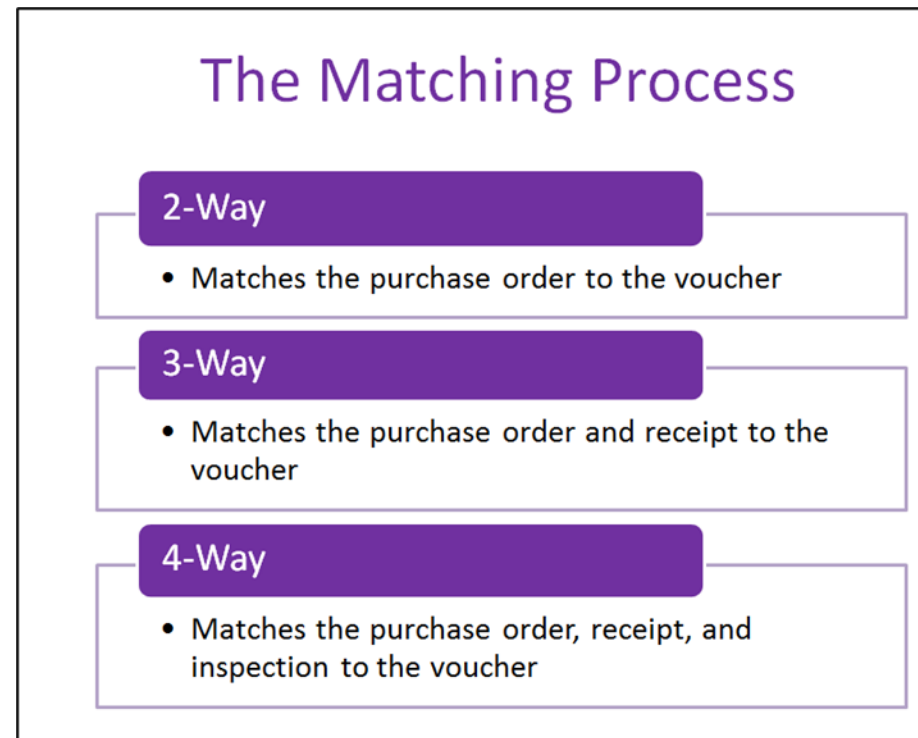


Lesson 3: Integration Points Between SCM and Finance INFORMS Modules

The main integration between Purchasing and Finance occurs in the Accounts Payable module. Once purchase orders have been dispatched and a receipt has been created, the invoice will be processed through the Accounts Payable module in the form of a voucher.

Lesson 3: Integration Points Between SCM and Finance INFORMS Modules Cont'd

Once entered, vouchers will be “matched” with purchase orders and receipt information to ensure the invoice is being paid for the appropriate order.



Lesson 3: Lesson Summary

Now that you have completed the Integration Points Between SCM and Finance INFORMS Modules lesson, you should be able to:

- Understand the integration points between SCM and Finance INFORMS modules within Commitment Control, Asset Management, and Project Costing
- Understand the matching process

Module 3: Course Summary

Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

Course Content Summary

Congratulations on completing the Supply Chain Management Fundamentals course. You now understand:

- Understand the fundamentals of INFORMS Supply Chain Management (SCM) objectives
- Understand the SCM end-to-end processes
- Understand the integration points between SCM and Finance INFORMS modules

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

Additional Training and Job Aids

Other training materials, related to this topic, include:

- SCM 201 – Manage and Record Requisitions
- SCM 202 – Manage and Record Purchase Orders
- SCM 203 – Record Receipt of Goods and Services
- SCM 205 – Departmental Supplier Contract Management
- SCM 206 – Grantor Management
- SCM 301 – Central Supplier Contract Management
- FIN 303 – Central Supplier Management

Additional Training and Job Aids

You also have the following resources available to you:

- Job Aids
 - Job Aids related to the above course topics

For additional information, be sure to visit: www.miamidade.gov/informs



Congratulations on successfully completing the Supply Chain Management Fundamentals course!

SCM 101 – Supply Chain Management Fundamentals