



AFISM TRAINING CHECKLIST

This guide is designed to assist you create an effective class schedule. In it you will learn about the classes that are pre-requisites to other classes, suggested grouping of classes and listing of classes and descriptions. The final pages provide you with an upcoming schedule of the classes that AFISM offers.

No Pre-requisite: These classes are for immediate registration and do not have a pre-requisite:

- Budget Prep Training (offered once a year in May)
- Citibank Procurement Training
- Employee One Time Payment System Overview (EOPS)
- Financial Management 101
- Introduction to Cognos
- Introduction to Financial Transaction System (FiTS) – Online Training Module
- Property Inventory – Online Training Module
- Travel Training for Travel Preparer
- Xtender Scanning & Indexing
- ePAF Training

Pre-requisites: Below are the “Pre-requisite” courses with the classes they support.

- Financial Management 101: Introduction to the FOAP Codes - Completion of this class is required before registering for:
 - Account Code Training for Expenditures
 - Banner 9 Navigation
 - Budget Management and Revision
 - All Cognos Finance Reporting classes (see *Understanding Finance at Texas Tech* below for list of classes)
 - TechBuy for the Shopper
- Introduction to Cognos– This class must be completed before registering for any Cognos Reporting Classes
- ePAF Training– This is a pre-requisite for all HR Reporting classes.

Suggested Class Order: The grouping below is a suggested order for classes, going from top to bottom within the class category.

- Purchasing Processes at Texas Tech
 - Financial Management 101
 - Account Coding for Expenditure
 - TechBuy
- Understanding Finance at Texas Tech
 - Finance Management 101
 - Introduction to Cognos
 - Financial Reporting – Budget Reports
 - Financial Reporting – Transaction Reports
 - Procurement Reporting in Cognos
 - Cognos Grant Reporting
- Managing HR Processes at Texas Tech
 - All About HR & ePAF (offered by Human Resources)
 - Introduction to Cognos
 - HR Reporting Employee Appointment Reports
 - HR Reporting Payroll Reports



AFISM TRAINING CHECKLIST

Below is AFISM's catalog of classes for different business categories. The pre-requisite classes that must be completed before registering for a specific class are displayed with that class.

In addition to classes, AFISM provides other learning resources which can be accessed from the A&F Work Tools tab of Raiderlink, within the AFISM Channel:

- Knowledge Base – a data base of frequently asked questions about various business operations.
- Resources – a file of job aids for different business procedures.
- AFISM Training Website - The online catalog of classes and class materials.
- Cornerstone – the application used for enrollment and cancellation of classes. You will find your training schedule and transcript in Cornerstone.

BUDGET

- **Budget Management and Revision** – for those whose role is to manage and revise budgets.
 - *Pre-requisite: Financial Management 101.*
- **Budget Prep Training** – for those whose role is to create and approve budgets for the new fiscal year (offered in the spring only).

COGNOS REPORTING

- **Introduction to Cognos** – Overview and navigation of the Cognos Reporting System.
 - This Course is a *pre-requisite* for ALL Cognos classes.
- **Financial Reporting Budget Reports** – For those responsible for monitoring departmental budgets.
 - *Pre-requisites: Introduction to Cognos and Financial Management 101.*
- **Financial Reporting Transaction Reports** – For those who reconcile accounts and monitor expenses.
 - *Pre-requisites: Introduction to Cognos and Financial Management 101.*
- **Cognos Grant Reporting** – For those who manage the financial activity on grant accounts.
 - *Pre-requisites: Introduction to Cognos and Financial Management 101.*
- **Procurement Reporting in Cognos** – For those who monitor encumbrance activity on a FOP. Includes encumbrances created using the TechBuy and Travel Systems.
 - *Pre-requisites: Introduction to Cognos and Financial Management 101.*
- **HR Reporting Employee Appointment Reports** – For those who create ePAFs and who monitor job and salary assignments for an organization.
 - *Pre-requisites: Introduction to Cognos and All About HR & ePAF.*
- **HR Reporting Payroll Reports** – For those who track payroll activity for FOPs, including reports of expenditures, histories and encumbrances.
 - *Pre-requisites: Introduction to Cognos and All About HR & ePAF.*

FINANCE

- **Financial Management 101: Introduction to FOAP Codes** – Overview of TTU's financial structure
 - This course is a **pre-requisite** for *TechBuy, Finance and Cognos Financial Reporting courses*.
- **Banner 9 Navigation** – For those in a department that uses Finance Forms in Banner.
 - *This class must be attended in order to gain access to the Banner System.*
 - *Pre-requisite: Financial Management 101*
- **Introduction to Financial Transaction System (FiTS): Online Training Module** – For those who will be submitting Cost Transfers, Revenue Journal Vouchers (JV) or Intra-Institutional Vouchers (IV).

HUMAN RESOURCES (HR) / PAYROLL

- **EOPS – Employee One Time Payment System Overview** – How to perform the procedure for payment an employee for a one time task or a short project.

PROCUREMENT

- **TechBuy Shopper** – For those who will use the TechBuy system to make purchases on behalf of a department.
 - *Pre-requisites: Financial Management 101*
 - *We encourage Account Code Training for Expenditures as well.*
- **Travel Training for Travel Preparer** – For those who will be submitting travel applications and vouchers.
- **Account Code Training for Expenditures** – In depth discussion of terminology and special purchase procedures when choosing account codes for expenditures.
 - *Pre-requisite: Financial Management 101*
- **Citibank Procurement Card Training** – Offered by Procurement Services for the Cardholder / Reconciler.

PROPERTY INVENTORY

- **Property Inventory Online Training Module** – Optional training course for those responsible for completing / managing the property inventory for their departments.

XTENDER

- **Xtender – Scanning & Indexing** – For Faculty/ Staff who will be scanning and indexing departmental documents into the Xtender system or who will be viewing documents in the system.

View the Upcoming Class Schedules on the Following Pages, highlight the classes that you need to assist you in developing your training plan.

Dates & times are subject to change. Check Cornerstone Registration System for Current Schedule

Class	Day	Date
Account Code Training for Expenditures	Friday	7/17/2020 9:00 AM CST
Account Code Training for Expenditures	Wednesday	7/29/2020 10:30 AM CST
Account Code Training for Expenditures	Wednesday	8/12/2020 1:30 PM CST
Account Code Training for Expenditures	Wednesday	8/26/2020 9:00 AM CST
Banner 9 Finance Navigation	Thursday	7/16/2020 10:30 AM CST
Banner 9 Finance Navigation	Tuesday	7/21/2020 3:00 PM CST
Banner 9 Finance Navigation	Thursday	7/30/2020 1:00 PM CST
Banner 9 Finance Navigation	Wednesday	7/8/2020 10:30 AM CST
Banner 9 Finance Navigation	Wednesday	8/12/2020 3:00 PM CST
Banner 9 Finance Navigation	Tuesday	8/18/2020 3:00 PM CST
Banner 9 Finance Navigation	Wednesday	8/26/2020 10:30 AM CST
Banner 9 Finance Navigation	Monday	8/3/2020 1:00 PM CST
Budget Management and Revision	Wednesday	7/15/2020 1:30 PM CST
Budget Management and Revision	Thursday	7/30/2020 10:00 AM CST
Budget Management and Revision	Friday	8/14/2020 9:00 AM CST
Budget Management and Revision	Wednesday	8/26/2020 1:30 PM CST
Cognos Grant Reporting	Tuesday	7/21/2020 1:30 PM CST
Cognos Grant Reporting	Tuesday	7/7/2020 9:00 AM CST
Cognos Grant Reporting	Monday	8/24/2020 1:30 PM CST
Cognos Grant Reporting	Thursday	8/6/2020 9:00 AM CST

EOPS: Employee One-time Payment System Overview	Wednesday	7/22/2020 8:30 AM CST
EOPS: Employee One-time Payment System Overview	Wednesday	7/8/2020 1:30 PM CST
EOPS: Employee One-time Payment System Overview	Tuesday	8/18/2020 1:30 PM CST
EOPS: Employee One-time Payment System Overview	Wednesday	8/5/2020 1:30 PM CST
Financial Management 101: Introduction to FOAP Codes	Wednesday	7/22/2020 1:30 PM CST
Financial Management 101: Introduction to FOAP Codes	Thursday	7/9/2020 9:00 AM CST
Financial Management 101: Introduction to FOAP Codes	Wednesday	8/19/2020 1:30 PM CST
Financial Management 101: Introduction to FOAP Codes	Friday	8/7/2020 9:00 AM CST
Financial Reporting - Budget Reports	Tuesday	7/21/2020 9:00 AM CST
Financial Reporting - Budget Reports	Tuesday	8/18/2020 9:00 AM CST
Financial Reporting - Budget Reports	Tuesday	8/4/2020 9:00 AM CST
Financial Reporting - Transaction Reports	Thursday	7/23/2020 1:30 PM CST
Financial Reporting - Transaction Reports	Tuesday	8/18/2020 1:30 PM CST
Financial Reporting - Transaction Reports	Tuesday	8/4/2020 1:30 PM CST
HR Reporting - Employee Appointment Reports	Tuesday	7/14/2020 9:00 AM CST
HR Reporting - Employee Appointment Reports	Tuesday	7/28/2020 9:00 AM CST
HR Reporting - Employee Appointment Reports	Tuesday	8/11/2020 9:00 AM CST
HR Reporting - Employee Appointment Reports	Tuesday	8/25/2020 9:00 AM CST
HR Reporting - Payroll Reports	Thursday	7/16/2020 9:00 AM CST
HR Reporting - Payroll Reports	Thursday	7/30/2020 9:00 AM CST
HR Reporting - Payroll Reports	Monday	7/6/2020 1:30 PM CST
HR Reporting - Payroll Reports	Tuesday	8/11/2020 1:30 PM CST

HR Reporting - Payroll Reports	Tuesday	8/25/2020 1:30 PM CST
Introduction to Cognos	Friday	7/10/2020 9:00 AM CST
Introduction to Cognos	Tuesday	7/14/2020 10:00 AM CST
Introduction to Cognos	Thursday	7/16/2020 8:30 AM CST
Introduction to Cognos	Tuesday	7/21/2020 1:30 PM CST
Introduction to Cognos	Friday	7/24/2020 8:30 AM CST
Introduction to Cognos	Tuesday	7/28/2020 10:30 AM CST
Introduction to Cognos	Thursday	7/30/2020 3:00 PM CST
Introduction to Cognos	Monday	7/6/2020 1:30 PM CST
Introduction to Cognos	Tuesday	8/11/2020 10:30 AM CST
Introduction to Cognos	Thursday	8/13/2020 1:30 PM CST
Introduction to Cognos	Wednesday	8/19/2020 10:30 AM CST
Introduction to Cognos	Friday	8/21/2020 9:00 AM CST
Introduction to Cognos	Monday	8/24/2020 1:30 PM CST
Introduction to Cognos	Thursday	8/27/2020 10:30 AM CST
Introduction to Cognos	Monday	8/3/2020 3:00 PM CST
Introduction to Cognos	Wednesday	8/5/2020 10:30 AM CST
Procurement Reporting in Cognos	Thursday	7/23/2020 9:00 AM CST
Procurement Reporting in Cognos	Thursday	7/9/2020 1:30 PM CST
Procurement Reporting in Cognos	Thursday	8/20/2020 9:00 AM CST
Procurement Reporting in Cognos	Thursday	8/6/2020 1:30 PM CST
TechBuy Shopper	Monday	7/13/2020 1:00 PM CST

TechBuy Shopper	Tuesday	7/14/2020 1:30 PM CST
TechBuy Shopper	Tuesday	7/7/2020 1:30 PM CST
TechBuy Shopper	Thursday	7/9/2020 9:00 AM CST
TechBuy Shopper	Monday	8/10/2020 9:00 AM CST
TechBuy Shopper	Thursday	8/20/2020 1:30 PM CST
Travel Training for Travel Preparer	Wednesday	7/15/2020 9:00 AM CST
Travel Training for Travel Preparer	Wednesday	7/29/2020 1:30 PM CST
Travel Training for Travel Preparer	Wednesday	8/12/2020 9:00 AM CST
Travel Training for Travel Preparer	Tuesday	8/25/2020 1:30 PM CST
Xtender - Scanning and Indexing	Tuesday	7/14/2020 1:30 PM CST
Xtender - Scanning and Indexing	Wednesday	7/22/2020 10:30 AM CST
Xtender - Scanning and Indexing	Tuesday	7/7/2020 10:00 AM CST
Xtender - Scanning and Indexing	Tuesday	8/18/2020 10:30 AM CST
Xtender - Scanning and Indexing	Wednesday	8/5/2020 3:00 PM CST