



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



# DMFR 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.**

**Check Cornerstone for most recent schedule; dates & times are subject to change**

<b>Class</b>	<b>Day</b>	<b>Date</b>
Account Code Training for Expenditures	Tuesday	10/4/2022
Account Code Training for Expenditures	Thursday	10/20/2022
Account Code Training for Expenditures	Monday	11/10/2022
Budget Management and Revision	Tuesday	10/25/2022
Budget Management and Revision	Monday	11/7/2022
Budget Management and Revision	Tuesday	11/29/2022
Cognos Grant Reporting	Thursday	10/6/2022
Cognos Grant Reporting	Thursday	11/3/2022
Cognos Grant Reporting	Thursday	11/17/2022
EOPS: Employee One-time Payment System Overview	Wednesday	10/5/2022
EOPS: Employee One-time Payment System Overview	Wednesday	10/12/2022
EOPS: Employee One-time Payment System Overview	Tuesday	10/25/2022
Financial Management 101: Introduction to FOAP Codes	Thursday	10/6/2022
Financial Management 101: Introduction to FOAP Codes	Tuesday	10/18/2022
Financial Management 101: Introduction to FOAP Codes	Monday	10/31/2022
Financial Management 101: Introduction to FOAP Codes	Tuesday	11/15/2022
Financial Reporting - Budget Reports	Tuesday	10/18/2022
Financial Reporting - Budget Reports	Tuesday	11/1/2022
Financial Reporting - Budget Reports	Thursday	11/17/2022
Financial Reporting - Transaction Reports	Monday	10/10/2022
Financial Reporting - Transaction Reports	Monday	10/24/2022
Financial Reporting - Transaction Reports	Tuesday	11/1/2022
Financial Reporting - Transaction Reports	Tuesday	11/22/2022

HR Reporting - Employee Appointment Reports	Monday	10/3/2022
HR Reporting - Employee Appointment Reports	Tuesday	10/11/2022
HR Reporting - Employee Appointment Reports	Thursday	10/27/2022
HR Reporting - Employee Appointment Reports	Tuesday	11/8/2022
HR Reporting - Employee Appointment Reports	Monday	11/21/2022
HR Reporting - Payroll Reports	Tuesday	10/11/2022
HR Reporting - Payroll Reports	Monday	10/24/2022
HR Reporting - Payroll Reports	Tuesday	11/8/2022
HR Reporting - Payroll Reports	Monday	11/21/2022
Introduction to Cognos	Tuesday	10/4/2022
Introduction to Cognos	Tuesday	10/11/2022
Introduction to Cognos	Wednesday	10/19/2022
Introduction to Cognos	Wednesday	10/26/2022
Procurement Reporting in Cognos	Thursday	10/20/2022
Procurement Reporting in Cognos	Thursday	11/3/2022
Procurement Reporting in Cognos	Tuesday	11/22/2022
Travel Training for Travel Preparer	Monday	10/3/2022
Travel Training for Travel Preparer	Tuesday	10/11/2022
Travel Training for Travel Preparer	Friday	10/21/2022
Travel Training for Travel Preparer	Wednesday	10/26/2022
Xtender - Scanning and Indexing	Wednesday	10/5/2022
Xtender - Scanning and Indexing	Monday	10/10/2022
Xtender - Scanning and Indexing	Wednesday	10/12/2022
Xtender - Scanning and Indexing	Wednesday	10/19/2022

Xtender - Scanning and Indexing	Tuesday	10/25/2022
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