DMFR Training Checklist

This guide is designed to assist you in creating 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 DMFR classes.

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)
- Chrome River (offered by Procurement Services)
- 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
- Xtender Scanning & Indexing
- ePAF Training (offered by Human Resources)

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)
  - Introduction to TechBuy (offered by Procurement Services)
  - HR Reporting Employee Appointment Reports
  - HR Reporting Payroll Reports

- **Introduction to Cognos** – This class must be completed before registering for any Cognos 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
  - Introduction to TechBuy (offered by Procurement Services)

- **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**
  - Introduction to Cognos
  - HR Reporting Employee Appointment Reports
  - HR Reporting Payroll Reports
DMFR Training Checklist

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

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

- Knowledge Base – a database of frequently asked questions about various business operations.
- Resources – a file of job aids for different business procedures.
- DMFR 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.
- **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 Financial Management 101
- **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 Financial Management 101
**FINANCE**

- **Financial Management 101: Introduction to FOAP Codes** – Overview of TTU’s financial structure
  - This course is a **pre-requisite** for Cognos Financial Reporting courses, Finance, HR Reporting courses, and TechBuy.
- **Banner 9 Navigation** – For those in a department that uses Finance Forms in Banner.
  - *This class must be attended 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 to an employee for a one-time task or a short project.

**PROCUREMENT**

- **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

**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 and 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**

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