



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.
 - *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 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**

Session ID	Day	Start Date
<i>Account Code Training for Expenditures</i>	Thursday	11/16/2023 2:00 PM
<i>Account Code Training for Expenditures</i>	Wednesday	10/25/2023 2:00 PM
<i>Banner 9 Finance Navigation</i>	Thursday	10/26/2023 10:00 AM
<i>Banner 9 Finance Navigation</i>	Tuesday	11/7/2023 2:00 PM
<i>EOPS: Employee One-time Payment System Overview</i>	Tuesday	11/7/2023 10:00 AM
<i>Financial Management 101: Introduction to FOAP Codes</i>	Wednesday	11/15/2023 9:00 AM
<i>Financial Reporting - Budget Reports</i>	Friday	11/3/2023 9:00 AM
<i>Financial Reporting - Budget Reports</i>	Thursday	11/16/2023 9:00 AM
<i>Financial Reporting - Budget Reports</i>	Thursday	10/26/2023 1:30 PM
<i>Financial Reporting - Budget Reports</i>	Tuesday	11/28/2023 1:30 PM
<i>Financial Reporting - Budget Reports</i>	Tuesday	11/21/2023 1:30 PM
<i>Financial Reporting - Budget Reports</i>	Wednesday	11/8/2023 1:30 PM
<i>Financial Reporting - Transaction Reports</i>	Friday	11/17/2023 9:00 AM
<i>Financial Reporting - Transaction Reports</i>	Friday	10/27/2023 9:30 AM
<i>Financial Reporting - Transaction Reports</i>	Thursday	11/9/2023 1:30 PM
<i>Financial Reporting - Transaction Reports</i>	Tuesday	10/31/2023 2:00 PM
<i>Financial Reporting - Transaction Reports</i>	Wednesday	11/29/2023 9:30 AM
<i>HR Reporting - Employee Appointment Reports</i>	Thursday	11/9/2023 9:30 AM
<i>HR Reporting - Employee Appointment Reports</i>	Thursday	10/26/2023 10:00 AM

<i>HR Reporting - Employee Appointment Reports</i>	Tuesday	11/14/2023 10:00 AM
<i>HR Reporting - Employee Appointment Reports</i>	Wednesday	11/1/2023 2:00 PM
<i>HR Reporting - Payroll Reports</i>	Friday	11/10/2023 9:30 AM
<i>HR Reporting - Payroll Reports</i>	Friday	11/3/2023 2:00 PM
<i>HR Reporting - Payroll Reports</i>	Friday	10/27/2023 2:00 PM
<i>HR Reporting - Payroll Reports</i>	Tuesday	11/14/2023 2:00 PM
<i>Introduction to Cognos</i>	Tuesday	11/14/2023 1:30 PM
<i>Introduction to Cognos</i>	Wednesday	11/1/2023 10:00 AM
<i>Xtender - Scanning and Indexing</i>	Thursday	11/2/2023 10:00 AM
<i>Xtender - Scanning and Indexing</i>	Tuesday	11/14/2023 3:00 PM