AFISM TRAINING CHECKLIST

Administration and Finance, Information Systems Management (AFISM) welcomes you to Texas Tech University! AFISM offers training in Budget, Cognos Reporting, Finance, Human Resources, Procurement, Property Inventory and Xtender. We have multiple classes within each offering and several are role specific. Training provided through AFISM is geared for both beginners and advanced users to make them more effective in their home departments. **As you build your schedule, be aware that Financial Management 101, All About HR and ePAF and Introduction to Cognos are pre-requisites for some courses.

We also offer a wide variety of Training Documents, Job Aides, Training Videos and tools on our website: http://www.depts.ttu.edu/afism/

If you are interested in attending one of the trainings offered, please follow the link below to SumTotal to register for a class, as well as to find up-to-date information about trainings offered by AFISM: http://webapps.tosm.ttu.edu/itts/sumtotalsystems

**BUDGET**

☐ Budget Management and Revision (BDGOBR01) - *(Pre-requisite FIMGT101)* For those whose role is to create, revise and reconcile budgets.

☐ Budget Prep Training (BDGPRP01) - *(Spring Only)* For those whose role is to create and approve budgets for the new fiscal year.

**COGNOS REPORTING**

☐ Introduction to Cognos (COGRPT06) - Overview and navigation of the Cognos Reporting tool. Introduction to key terms, terminology and basic functionality. **This course is the pre-requisite for ALL Cognos classes.**

☐ Finance Reporting Basics (COGRPT07) - *(Pre-requisite COGRPT06 and FIMGT101)* Designed for users of Cognos Finance Reports to understand terminology, system functionality, financial processes and key financial reports.

☐ Financial Reporting-Budget Reports (COGRPT02) - *(Pre-requisite COGRPT06 and FIMGT101)* For those responsible for monitoring departmental budgets.

☐ Financial Reporting-Transaction Reports (COGRPT03) - *(Pre-requisite COGRPT06 and FIMGT101)* For those who reconcile accounts and monitor expenses.

☐ Cognos Grant Reporting (COGRPT04) - *(Pre-requisite COGRPT06 and FIMGT101)* For those who manage the financial activity on grant accounts.

☐ Procurement Reporting in Cognos (COGRPT05) - *(Pre-requisite COGRPT06 and FIMGT101)* For those who monitor the encumbrance activity on a FOP. Includes encumbrances created using TechBuy, Travel System Payroll Encumbrances, etc..

☐ HR Reporting-Employee Appointment Reports (COGHR03) - *(Pre-requisite COGRPT06 and HREPAF01)* For those who create ePAFs and who monitor the job assignments and salaries for an organization.

☐ HR Reporting-Payroll Reports (COGHR02) - *(Pre-requisite COGRPT06 and HREPAF01)* For those who track payroll activity for FOPS, including reports of expenditures, histories, and encumbrances.
**FINANCE**

- **Financial Management 101: Introduction to FOP Codes (FIMGT101)** - Prior to attending Finance, Budget and Procurement classes it is necessary to learn about TTU’s financial structure. This course provides an overview of the structure, codes, expenditure guidelines and available budget balances. This course is also the gateway to key terms and terminology for other trainings. **This course is the pre-requisite for Finance, TechBuy and Cognos classes.**

- **New Fund Request System (FINFST01)** - (Pre-requisite FIMGT101) For those that will be responsible for establishing new Funds for their organization.

- **Finance INB Navigation and Exercises (BANFI001)** - (Pre-requisite FIMGT101) Navigating Internet Native Banner (INB) financial date for Finance Managers (required before access to INB approved).

- **Intro to Financial Transaction System (FiTS) (FINFITS)** - (Pre-requisite FIMGT101) For those who will be submitting cost transfers, intra-institutional vouchers or revenue journals.

**HUMAN RESOURCES (HR)/PAYROLL**

- **All About HR and ePAF (HREPAF01)** - For ePAF preparers with related HR practices and procedures (required prior to access approval for ePAF Originators). This course is 3 sessions offered over 1.5 days. Attendance to all 3 sessions is required to receive credit and access to the ePAF Originator system. **This course is the pre-requisite for other HR course offerings, including HR Cognos Reporting.**

- **Summer ePAF Appointments (HRSUMM01)** - (Pre-requisite HREPAF01) (Spring Only) Practices and procedures about Summer appointments for Faculty and Graduate Students.

- **EOPS: Employee One Time Payment System Overview (EOPS001)** - How to perform the procedure for paying an employee for a one time task or short project.

**PROCUREMENT**

- **TechBuy Shopper Training (TBSHOP01)** - (Pre-requisite FIMGT101) For those who will use the TechBuy system to make purchases on behalf of a department.

- **Travel Training for Travel Preparer (TRVL001)** - For those who will be submitting travel applications and vouchers

- **Citibank Procurement Card Training (PCARDH01)** - For the Cardholder/Reconciler.

**PROPERTY INVENTORY**

- **Property Inventory System Training (PRINV)** - (Spring Only) For those responsible for doing property inventory for their departments.

**XTENDER**

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