

AFISM Training Checklist: Registering for AFISM Classes

This guide presents pre-requisite classes, followed by class groupings to assist the new employee with creating an effective class schedule, followed by the listing of Classes and descriptions

Pre-requisites: These classes must be completed before registering for certain other classes. They have no pre-requisite and are open for immediate registration. If needed, schedule pre-requisites first:

- Financial Management 101: Introduction to FOAP Codes (FIMGT101). This class must be completed before registering for certain Finance, Procurement, and all Finance Cognos Reporting classes.
- All About HR and ePAF (HREPAF01). This is a pre-requisite for all HR Cognos Reporting classes.
- Introduction to Cognos (COGRPT06). This class must be completed before registering for other Cognos Reporting classes.

No Prerequisite Required: These classes are available for immediate registration.

- Budget Prep Training (BDGPRP01): Only offered in May
- Citibank Procurement Card Training (PCARDH01)
- EOPS: Employee One Time Payment System Overview (EOPS001)
- Intro to Financial Transaction System: Online Training Module
- Property Inventory Online Training Module (PRINV100): Inventory is verified in the Spring
- Travel Training for Travel Preparer (TRVL001)
- Xtender- Scanning & Indexing (XTSCAN)

Class Groups for Certain Job Assignments:

For TechBUY (Purchase Orders)	<ul style="list-style-type: none"> • Financial Management 101: Introduction to FOAP Codes (FIMGT101) • Account Code Training for Expenditures (ACCODE01) • TechBuy Shopper Training (TBSHOP01)
Financial Management 101 Pre-requisite: Once completed, also register for these classes	<ul style="list-style-type: none"> • Finance INB Navigation and Exercises (BANFI001) • Budget Management and Revision (BDGOBR01)
For Preparing ePAFs	<ul style="list-style-type: none"> • All About HR and ePAF (HREPAF01) • Summer ePAF Appointments (HRSUMM01)
Cognos Reports for Finance: When <u>Introduction to Cognos (COGRPT06)</u> and <u>Financial Management 101 (FIMGT101)</u> have been completed, choose from these classes	<ul style="list-style-type: none"> • Financial Reporting-Budget Reports (COGRPT02) • Financial Reporting-Transaction Reports (COGRPT03) • Cognos Grant Reporting (COGRPT04) • Procurement Reporting in Cognos (COGRPT05)
Cognos Reports for HR and Payroll: When <u>Introduction to Cognos (COGRPT06)</u> and <u>All About HR and ePAF (HREPAF01)</u> have been completed, choose from these classes	<ul style="list-style-type: none"> • HR Reporting-Employee Appointment Reports (COGHR03) • HR Reporting-Payroll Reports (COGHR02)

Continue on to find the AFISM Training Checklist – a listing of classes and descriptions!



AFISM TRAINING CHECKLIST

Administration and Finance, Information Systems Management (AFISM) welcomes you to Texas Tech University!

Below you will find AFISM's catalog of classes for different business categories. Please notice the pre-requisite classes that must be completed before registering for other classes, such as

[Financial Management 101 \(FIMGT101\)](#) • [All About HR and ePAF \(HREPAF01\)](#) • [Introduction to Cognos \(COGRPT06\)](#)

On your RaiderLink 'A&F Work Tools' tab, you will find AFISM's links to additional learning resources:

- Knowledge Base – a data base of frequently asked questions about different business operations
- Resources – a file of job aids for different business procedures
- AFISM Training Website – The online catalog of classes and class materials (where you found this checklist)
- SumTotal (Register for Classes) – an application for class enrollment/cancellation, and your personal training schedule and transcript. This application is used by departments other than AFISM for university-wide classes.

BUDGET

- Budget Management and Revision (BDGOBR01)** - *(Pre-requisite FIMGT101)* For those whose role is to manage and revise budget(s).
- 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.**
- 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 FOAP 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 budget balances. *****This course is the pre-requisite for Finance and Cognos courses, and TechBuy.***
- Finance INB Navigation and Exercises (BANFI001)** - (*Pre-requisite FIMGT101*) Learn to access financial data in Internet Native Banner (INB) (*must be attended to be approved for INB access*).
- Intro to Financial Transaction System (FITS) (FINFITS): Online Training Module** – For those who will be submitting Cost Transfers, Revenue Journal Vouchers (JVs) or Intra-Institutional Vouchers (IVs).

HUMAN RESOURCES (HR)/PAYROLL

- All About HR and ePAF (HREPAF01)** – This course provides an overview of the employment practices, guidelines, and forms used for changing the status of employees. This course of 3 sessions over 1.5 days must be completed in sequence and in total 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*) (*Offered in March-June*) Practices and procedures about Summer School jobs 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.
- Account Code Training for Expenditures (ACCODE01)** – In depth discussion of terminology and special purchase procedures used when choosing account codes for expenditures. Feedback from attendees is that this class should be attended sooner, and not delayed.
- Citibank Procurement Card Training (PCARDH01)** – Taught by Procurement Services for the Cardholder/Reconciler.

PROPERTY INVENTORY

- Property Inventory Online Training Module (PRINV100)** – Optional training course for those responsible for completing/managing the 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.