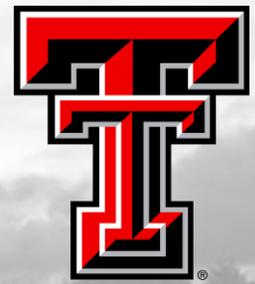


AFISM NEWSLETTER

JULY 2016



LUMINIS PORTAL UPGRADE COMING MONDAY JULY 18TH

What we know as *Raiderlink* or “The Portal” is getting a face lift. The new portal will be active when we arrive to work Monday July 18th.

What’s in the new portal?

- **Tabbed Structure for Content**
- **Updated & Crisper Design**
- **Channels Hold Data Links**
- **A&F Work Tools Tab**
Automatically Displays
- **Only 1 Available Budget Tab**

****Current Available Budget settings will NOT transfer to the new portal.**

Please read on page 2, how you can prepare for the transition.



AFISM JULY & EARLY AUGUST CLASS OFFERINGS

If you are interested in attending one of the trainings offered, please follow the link below to SumTotal to register for a class:

<http://webapps.tosm.ttu.edu/itts/sumtotalsystems>

Name	Start Date
Xtender - Scanning and Indexing	7/6
EOPS: Employee One-time Payment System Overview	7/7
Finance Reporting Basics	7/7
Financial Management 101: Introduction to the FOAP Codes	7/8
Travel Training for Travel Preparer	7/11
Finance INB Navigation and Exercises	7/12
Introduction to Cognos	7/12
Intro to Financial Transactions System (FiTS)	7/13
Budget Management and Revision	7/14
Financial Reporting - Budget Reports	7/18
Financial Management 101: Introduction to the FOAP Codes	7/19
TechBuy Shopper Training	7/19
Xtender - Scanning and Indexing	7/20
Financial Reporting - Transaction Reports	7/21
HR Reporting - Employee Appointment Reports	7/25
Cognos Grant Reporting	7/26
Procurement Reporting in Cognos	7/26
All About HR and ePAF, Session 1	7/26
All About HR and ePAF, Session 2 & 3	7/27
Financial Management 101: Introduction to the FOAP Codes	7/28
HR Reporting - Payroll Reports	7/28
Introduction to Cognos	7/28
TechBuy Shopper Training	8/2
Xtender - Scanning and Indexing	8/2
EOPS: Employee One-time Payment System Overview	8/4
Intro to Financial Transactions System (FiTS)	8/4

****Please note that the class dates and times are subject to change.**

HOW TO PREPARE FOR THE NEW LUMINIS PORTAL

What you need to know...

Between today and **Friday July 15th**, users need to capture the FOP information that is currently being displayed on their Available Budget Tab(s). We advocate to take screen shots where possible or to take note of the information that you would like to set up in the new portal.

The information currently displayed on your Available Budget tab **WILL NOT TRANSFER** to the new portal. The new portal will **go live on Saturday July 16th**, so that **Monday July 18th** when you arrive to work it will be in place.

We will be releasing instructions on how to set up your NEW Available Budget tab through TechAnnounce and be sending out a *Special Edition* Newsletter with additional information. Please be on the lookout for this information in a future TechAnnounce.

We are trying to prevent you from losing any information and to help you with navigating the new portal.

NEW AFISM TRAINING WEBSITE SNEAK PEEK

Training is getting a new look...

We have been working behind the scenes to create a NEW Training Website for the classes taught by AFISM. This site will be linked to the full AFISM page, but focus on the training classes, class documents, tools and resources related to the courses for learners. New to the site: Quick links directly to SumTotal to register (for each class), up to date class schedules, links to Training and Resource materials by class and more...

The site offers a better a user experience when trying to search for classes and register. The quick links to Training Materials allow learners to go back and reference everything from class. We hope that this site also makes it easier to register for classes and have more information about the classes needed for roles. We will announce the GO LIVE date and provide communications when the site is launched with the appropriate links.

Here is peek into the site, while it's under construction:

The screenshot shows the AFISM Training website. At the top left is the Texas Tech University logo. On the right, there are links for 'Directory', 'Paiderlink', and 'A-Z Index'. Below the header is a navigation bar with 'AFISM Training' on the left and 'AFISM', 'Available Courses', and 'Class Schedule' on the right. A breadcrumb trail reads '# / AFISM / AFISM Training'. The main content area features a large red banner with the text 'WELCOME TO AFISM TRAINING. We make learning legendary'. Below the banner is a row of six image-based category tiles: FINANCE (hand with calculator), BUDGET (calculator), HR (hand holding pen), PROCUREMENT (hand holding pen), XTENDER (hand holding pen), and COGNOS (hand holding pen). At the bottom, there are three columns of content: 'About AFISM' (Administration and Finance, Information Systems Management (AFISM) offers employees), 'Upcoming Classes' (Financial Reporting: Transaction Reports, Class Date: June 16, 2016), and 'Something Else'.

CLASS SCHEDULE

Below you will find a list of our upcoming classes. Several of the classes are offered multiple times, so pick the one that works best with your schedule. *Note: Times and dates will sometimes change, so for a fully up-to-date schedule, please visit [SumTotal](#)*

PROPERTY INVENTORY SYSTEM TRAINING (PRINV)

Instructor: Byron Anderson
Class Date: June 22, 2016

PROCUREMENT REPORTING IN COGNOS

Instructor: Byron Anderson
Class Date: June 23, 2016

COGNOS GRANT REPORTING

Instructor: Jill Lindsey
Class Date: June 27, 2016

FINANCIAL REPORTING: BUDGET REPORTS

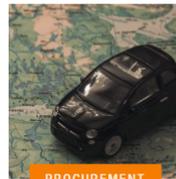
Instructor: Jill Lindsey
Class Date: July 18, 2016

COURSE TOPICS

[View All](#)
[Budget](#)
[Cognos](#)
[Finance](#)
[HR](#)
[Procurement](#)

See the current class schedule in SumTotal:

- Click on the course name to learn more about it.
- Or click on one of the course topics to see all of the available sessions.



PROCUREMENT

Travel Training for Travel Preparer

Do you need to learn how to use the Travel System? This class is offered in conjunction with the Travel Department. You will learn the policies regarding travel and then have opportunity to have hands-on training within the Travel System. The class takes you through how to submit a travel application and how to then submit a voucher. In addition, you learn the policies that affect your business decisions for travel as well as the reports to use in verifying that funds for travel are available.

[LEARN MORE](#)

Learn more about the class or click on the **Class Materials** tab to quickly access Training Aids for the class:

Register for the class while on the same page! Link takes you directly to that class in SumTotal.

Xtender – Scanning & Indexing

[REGISTER NOW](#)



[CLASS INFO](#)

[CLASS MATERIALS](#)

TRAINING AIDS

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

[Xtender Activity Guide](#)
[Xtender Basics & Quick Reference Guide](#)
[Xtender Icon Quick Reference](#)

Easily browse for detailed class descriptions, and Learn More about the course offerings.



FINANCE

Finance INB Navigation & Exercises

This is a hands-on INB (Internet Native Banner) class for financial information. You will review how financial information is stored and learn how to move from data screen to data screen, viewing selected information from Procurement, Budget, and General Ledger. Financial Management 101 is a pre-requisite to this class, and this Finance INB Navigation class must be completed before you can obtain access to view information in Banner Finance INB.

[LEARN MORE](#)



FINANCE

New Fund Request System

For those that will be responsible for establishing new Funds for their organization.

[LEARN MORE](#)



FINANCE

Intro to Financial Transaction System (FITS)

This class serves as an introduction to "FITS", or the Financial Transactions System'. The FITS system allows users to submit and process interdepartmental cost transfers (transfer of expense(s) from one FOP to another). It also introduces the automated process to prepare and submit IV (Intra-Institutional Vouchers) and Revenue JV (Journal Vouchers) documents.

[LEARN MORE](#)



FINANCE

Financial Management 101: Introduction to FOP Codes

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.

[LEARN MORE](#)

LOSING EPAF APPROVAL TYPES? UNABLE TO SAVE ENTRIES?

When you get down to the end of the ePAF and are unable to enter and save Levels, Labor Distribution, or Default Earnings, what can you do? Most of the time, the ePAF is labeled *Corrupt* and the only solution is to delete it and start over.

But, what if you started at the bottom to enter and save those Approval Types that become difficult?

It seems that Default Earnings is the most sensitive Approval Type on the ePAF, so why not complete and save it first! Try this idea and these tips to see if you can save time:

Tips for Starting ePAF Entries – Bottom Up to Decrease Errors!

Default Earnings –

- On reappointment or FTE/PAY Change ePAFs, where the current Earn Codes are defaulted as new values, replace the old date with the Query Date for each Earn Code.
- To remove an Earn Code, it is better to remove the incorrect rows and add new rows. **Click Save and Add New Rows** which will cause a Remove box to appear for each Earn Code row (it also causes the Remove boxes for the Labor Distribution FOAPAL to appear below). Check the boxes of the code(s) to remove and click **Save** again.
- Follow the Template instructions; enter a Query Date with each Earn Code selected.
- Before leaving Default Earnings, be sure to **Save and Add New Rows**.

Labor Distribution, FOAPAL –

- To remove a FOAP row, it is better to remove the incorrect rows and add new rows.
- First, set the percent to .00 for each FOAP to remove and click **Save and Add New Rows**. This will cause a Remove box to appear for each FOAP row (this also causes the Remove boxes for the Default Earnings to appear above).
- Enter any new Chart and FOAP on a new row; edit the percent column to equal 100.
- Check the Remove boxes for the code(s) to remove; and **Save and Add New Rows** again.

Routing Queue –

- If optional approval levels are desired, select from the drop-down list and select a Required Action, until the desired levels are added, then **Save and Add New Rows**.
 - **TIP:** Start on the lowest level (99-Apply) and select the approver. The Routing Queue will position on the bottom of the screen with all rows visible.
 - ***You do not need to scroll down to position the Queue in the middle of your screen!*** Assign the approver to the next-lowest level and continue upward to the lowest level (20-Department?). ***This tip eliminates scrolling down between each approver selection!!***
 - Default Routing Queue: The link is found in your Originator Summary. You can save the levels and approvers to default to the ePAF each time it opens.
 - **NOTE:** When revising levels in the Queue, ***sometimes*** the Queue gets confused and will not let you delete a level. When this happens, remove all levels, re-select the ePAF and click **GO** to re-create the Queue from the beginning.
- Check whether the **Job Begin Date** (below) current value should be copied to the new value.
- Return to the top of the ePAF to complete the remaining entries.

REPORT MODIFICATIONS

HR035 – Employee Search Report

What has changed?

The way the HR035 report displays has been changed. Whether the report is executed by Organization, or for multiple persons by R#, eRaider, or Name Search, the data now groups by employee so that all of that person's information is presented together, rather than being spread throughout the report.

COGNOS SPOTLIGHT – REPORT OF THE MONTH

RPT_PAYDIST_OSP Payroll History with Hours - (Sponsored Programs Use Only)

Report Location: [Public Folders](#) > [Human Resources](#) > [Departmental Users](#) > [All Human Resources Reports](#).

This Report is designed for Sponsored Program reporting needs, providing the Payroll History for selected Fiscal Year and Pay Periods for an individual employee or for all employees paid by a Specific Fund, Organization (home or position level), or any combination of the FOAP. For those monitoring payroll on Sponsored Programs, the parameter for the FOAP details allow entry of the "Position Organization" code. This is valuable as it is common that the grant fund part or all of the salary for the employee while their Home Organization is a different Organization. An example would be that the employee's Home Organization would be Chemistry (B53003) while all or part of their salary is supported by B53630.

This report output provides details to pay include Employee information with position assignment, FOAP supporting the pay, type of pay, hours worked, earning and home orgn assignment of the employee.

Parameters:

Page 1:

Provide the Fiscal Year for the data and the Chart of Accounts for the data:

TEXAS TECH UNIVERSITY™
Budget & Resource Planning & Management

TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER
Budget Office™

RPT_PAYDIST_OSP - Payroll History w/ Hours (Sponsored Programs use only)

Choose from the selections below:

Fiscal Year (YYYY)

Chart of Accounts

Cancel Next >

Parameter Page 2:

- To execute for a specific employee:
 - o Search by R# or by Name
- To execute by Organization or by FOP, go to “next” page
- To execute for specific Fiscal / Payroll Period, use parameter provided
 - o Leave empty to view all Pay Periods

Choose from the selections below:

For individual employee, use either search option, to run by FOAP elements, select Next

Employee ID (R#)
(Optional & Slow)

Employee Name
(Optional)

Search by Name
Keywords:
Type one or more keywords separated by spaces.

[Options](#) ▾

Choice:

[Deselect](#)

Fiscal Period / Payroll Period*
(Optional)

- MN - 10 (01-SEP-15 - 30-SEP-15)
- SM - 18 (01-SEP-15 - 15-SEP-15)
- SM - 19 (16-SEP-15 - 30-SEP-15)
- MN - 11 (01-OCT-15 - 31-OCT-15)
- SM - 20 (01-OCT-15 - 15-OCT-15)
- SM - 21 (16-OCT-15 - 31-OCT-15)
- MN - 12 (01-NOV-15 - 30-NOV-15)
- SM - 22 (01-NOV-15 - 15-NOV-15)

[Select all](#) [Deselect all](#)

*If you do not select a Payroll Period, report will return all pay periods for the fiscal year.
(Pay Period is not person specific, it shows all available pay periods)

Click [Next >] to utilize advanced prompts (search by FOAP or Document ID)

Parameter Page 3:

- Utilize FOAP prompts as desired, noting that one prompt supports Home Orgn search while another supports Position Orgn search
 - o *For Sponsored Program accounts, utilize the Position Organization Parameter.*
- Enter in Finance Document ID within Document Number Search to look at data for that specific pay event
- Select Finish
 - o Report is defaulted to display in HTML format, to choose PDF or Excel, select Next rather than Finish

The screenshot shows a search parameter selection screen with a black background and white text. At the top, it says "Choose from the selections below:". Below this are several input fields with labels and character counts: "Home ORGN (Optional) (6 Characters)", "Document Number (Optional) (8 Characters)", "Fund (Optional) (Any number of characters)", "Position Org Organization (Optional)", "Account (Optional)", and "Program (Optional)". There are also radio buttons for "ORGN Search Options" with "FOAP Match Only" selected and "Match Home ORGN or FOAP ORGN" unselected. A "Deselect" link is visible below the radio buttons. At the bottom, there are three buttons: "< Back", "Finish", and "Next >". Annotations include a red oval around "Home ORGN", a red arrow pointing to "Position Org Organization", and a blue "Deselect" link.

Choose from the selections below:

Home ORGN (Optional) (6 Characters)

Document Number (Optional) (8 Characters)

Fund (Optional) (Any number of characters)

Position Org Organization (Optional)

ORGN Search Options

FOAP Match Only

Match Home ORGN or FOAP ORGN

[Deselect](#)

Account (Optional)

Program (Optional)

Click the [NEXT] button to select PDF or Excel Format **Next >**

< Back **Finish**

The report output below is shown in Excel format. Notice that within the report there is data related to:

- The Person
 - o R-Number, Name and Home Organization
- The Job
 - o Position, Job Suffix, Position Title and Employee Class
- The Payroll Event
 - o Payroll Id, Payroll Number, Event Sequence Number
 - o Transaction Date, Posting Status, Labor Distribution Hours, Pay Amount, Earnings Type, Earnings Description, Doc ID and Doc Date
- The FOAP
 - o Fund, Organization, Account and Program with descriptions of each

Payroll History w/ Hours (Sponsored Programs use only)																											
Person		Job				Payroll Event				FOAP Details						Payroll Event				Person							
R#	EMPL NAME	POSN	JOB SUFFIX	POSN TITLE	ECLASS	PAYROLL ID	PAYROLL NUM	EVENT SEQ NUM	FUND	FUND DESC	ORGN	ORGN DESC	BAC	BAC DESC	ACCT	ACCT DESC	PROG	PROG DESC	TRANS DT	POSTING STATUS	LABOR DIST HRS	AMT	EARNINGS	EARNINGS DESC	DOC	DOC DT	HOME ORGN
R1039573	Doe, John	T91542	00	Graduate Assistant	S1	SM	21	0	222134	Effect of Fluoride on Baby Teeth	Z59155	PI Jane Doe	6A4	SW Other Salaries Budget Pool	6A4401	SW Student Employee Graduate	200	Research Expense	10/31/2015	Y	4.00	\$60.00	RGH	Hours Worked	F0089676	11/10/15	B59210
R1039573	Doe, John	T91542	00	Graduate Assistant	S1	SM	21	0	222134	Effect of Fluoride on Baby Teeth	Z59155	PI Jane Doe	6B4	FB Payroll Related Cost Budget Pool	6B4902	FB Workers Compensation Insurance	200	Research Expense	10/31/2015	Y		\$0.15			F0089676	11/10/15	B59210

There is a **FREE** add-in for Power Point 13 & higher called **Office Mix?**

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- Insights & Analytics
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Sign in with *work* or *school* account using your TTU email address. It will prompt you to login with your eRaider and Password. Download and install!

CONTACT US:



PHONE

742-KNOW



EMAIL

afism.2know@ttu.edu



WEBSITE

http://www.depts.ttu.edu/afism/