AFISM is committed to providing a valuable knowledge base to the TTU employee infrastructure and our directive is to meet the individual needs of all our customers. You may or may not have heard some of the changes and new products that have been developed thus far in fiscal year 2014. Below you will find a highlight of the most recent items and the business need for each. Each month, our newsletter will end with a “Quick-Tip” of some useful tools that you may or may not be aware of.

AFISM assisted Payroll in providing more resources to the campus, and in an easier to access method. Previously Payroll training resources were in different locations on AFISM webpages, and Payroll Webmaster often emailed URLs when responding to inquiries. Recently AFISM created the Proxy documentation for the new TEAM App procedure, worked to improve both existing documentation and easier to read reports for Payroll’s existing TEAM App procedures, and provided links to frequently used Cognos Payroll reports.

If there are any questions or concerns please contact AFISM (afism.2know@ttu.edu or 742-KNOW) and we will be happy to assist you.

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**AFISM 2 KNOW - April 2014 Edition**

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**Quick TIP – COGNOS**

Did you know that you can execute a report, and then return to the parameter page from inside the report to enter a new set of parameters? There is a “Return to Parameter Option” that allows you to change the prompt page information without having to navigate back through Cognos to the report title link to execute the report. Go to the Quick Tip (last page of this announcement) to find out more.

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**Do You Have a Reporting Need?**

If the Cognos reports you are utilizing are not giving you exactly what you need, please let us know. With our large collection of reports, we might be able to point you to a report you did not know existed. If a reporting solution does not exist, we may be able to build a report or modify an existing report to fulfill your business needs.

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**AFISM TRAINING CHECKLIST**

The following two pages show you the AFISM Trainings Checklist. This is a guide of trainings currently offered by AFISM, including a description of each and pre-requisites for classes (where applicable). This document, along with a link to the SumTotal system to register for classes is located on the AFISM website. Choose ‘Training’ from the left-hand navigation, or use this link: [http://www.depts.ttu.edu/afism/Trainingv2/](http://www.depts.ttu.edu/afism/Trainingv2/)
Training Checklist

READY, SET, LEARN!
Training Classes for Administrative Information Systems, and More!
Jump to a fast job start with training classes offered by AFISM!

Administration & Finance Information System Management (AFISM) is pleased to welcome you to Texas Tech University! AFISM offers training in Ad Astra, Student, Finance, Human Resources, and Procurement, with multiple classes being available in each category. Trainings given through AFISM are geared to take both beginning and advanced users and make them more effective in their home departments.

Please browse our training website at [www.afism.ttu.edu](http://www.afism.ttu.edu), select the Training link to access the Registration site, Training Materials and Training Videos.

♦ Ad Astra VII Software Scheduling
  - Ad Astra VII Academic Scheduler—Academic Departmental Schedulers Only
  - Ad Astra VII Collaborative Scheduler—Academic Departmental Collaborative Schedulers Only
  - Ad Astra VII General User—Faculty/Staff and Building and Event Managers as an overview of the entire system
  - Ad Astra VII Event Manager (LAW)—Law School staff who manage events within their own building

♦ Banner Student
  - Online FERPA—All Banner Student users must take Online FERPA training via SunTotal.
  - Banner Basics - Faculty/Staff who need access to the Banner INB Student System.
  - Intermediate - The next level of the forms within both the INB and SSB Banner Student systems. For Advisors and anyone helping with advising and registration.
  - Permit (SFASRPO) Training—Limited to only employees who will place registration permits.
  - Time Ticketing — Limited to only employees responsible for adding Time Tickets in the Banner Student System.

♦ HR/Payroll
  - All About HR and ePAF—ePAF preparation, with related HR practices and procedures (required before access is approved for ePAF Originators).
  - Summer ePAF Appointments—Practices and procedures about summer appointments for faculty and graduate students.
  - EOPS: Employee One-Time Payment System Overview—Review the procedures for paying an employee for a one-time task or short project.

♦ Xtender
  - Xtender Scan & Index—Faculty/Staff that want to scan/index departmental documents into Xtender
  - Xtender Basics—Faculty/Staff who wish to review basic navigation in Xtender Property Inventory — Those responsible for doing the property inventory for their departments.
FINANCE, PROCUREMENT & COGNOS PRE-REQUISITE. Finance, Procurement and Cognos classes require completion of this pre-requisite before registering. Look for (Pre-req FM101)

- Financial Management 101: Introduction to FOAP Codes—Before attending Finance and Procurement classes; learn about TTU’s financial structure, codes, expenditure guidelines and available budget balances.

- Finance
  - Budget Management and Revisions—For administrators who create, revise and reconcile budgets (Pre-req FM101)
  - New Fund System—Those who will request establishment of a Fund
  - Finance INB Navigation and Exercises—Navigating Internet Native Banner (INB) financial data for finance managers (required before access in INB is approved) (Pre-req FM101)
  - FITS (Financial Transactions System)—Those who will be electronically submitting cost transfers, intra-institutional vouchers, or revenue journal vouchers (Pre-req FM101)
  - Property Inventory—Those responsible for doing the property inventory for their departments.

- Procurement
  - TechBuy—Those who will use the TechBuy system for purchasing on behalf of a department (Pre-req FM101)
  - Travel Training for the Preparer—Those who will be submitting travel applications and vouchers
  - Citibank Procurement Card Training for the Cardholder

- Cognos Reporting
  - Introduction to Cognos—Those who will use the Cognos Reporting system. Pre-Req to all other Cognos classes.
  - Cognos Reporting-Budget Reports—Those responsible for monitoring departmental budgets (Pre-req FM101)
  - Cognos Reporting-Transaction Reports—Those who reconcile accounts and monitor expenses (Pre-req FM101)
  - Grant Reporting—Those who manage the financial activity on grant accounts (Pre-req FM101)
  - Procurement Reporting in Cognos—Those who will monitor the encumbrance activity on a POP. Includes encumbrances created using TechBuy, Travel System, Payroll Encumbrances, etc. (Pre-req FM101)
  - HR Reporting-Employee Appointment Reports—Those who create ePAFs and who monitor the job assignments and salaries for an organization. Must complete the HR/Payroll class “All About HR and ePAF” before registering
  - HR Reporting-Payroll Reports—Those who track payroll activity for FOPS. Includes reports of expenditures, histories, and encumbrances. Must complete the HR/Payroll class “All About HR and ePAF” before registering.
Easy to Access Payroll Resources

AFISM assisted Payroll in providing more resources to the campus, and in an easier to access method. Previously Payroll training resources were in different locations on AFISM webpages, and Payroll Webmaster often emailed URLs when responding to inquiries. Recently AFISM created the Proxy documentation for the new TEAM App procedure, worked to improve both existing documentation and easier to read reports for Payroll’s existing TEAM App procedures, and provided links to frequently used Cognos Payroll reports. The results are:

- More Payroll resources available to the campus administrators and employees
- Resources are now in one location (see highlighted screen shot below)
- New links on RaiderLink provide easier and faster access
  - For department administrators: A&F Work Tools > HR channel > link, “Training Materials for ePAF, EOPS, and Payroll”
  - For campus employees: TTU Employee tab > Month At A Glance channel > link, “Training Materials for Timesheets, Leave Reports, and TEAM App” provide easier and faster access

Texas Tech University
Administration and Finance Information Systems Management

AFISM Training Materials

Dept Home | AFISM Home | AFISM Training | Training Materials

<table>
<thead>
<tr>
<th>Finance</th>
<th>HR</th>
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<th>Student</th>
<th>Cognos</th>
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<tbody>
<tr>
<td>HR</td>
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Directions: Click on a category to view a list of resources for that title.

Training Materials for HR/ePAF and EOPS

Reading Materials for the “All about HR and ePAF” Class:
- Human Resources and Employee Relationships [pdf Format](Updated: 09-25-2012)
- Your Department’s Roles: ePAF Originators, Approvers and Procees [pdf Format]
- ePAF Routing and Approval [pdf Format](Updated: 07-01-2011)
- All About ePAF and Approval Categories [pdf Format](Updated: 11-31-2010)
- Date Definitions You Should Know [pdf Format](Updated: 11-01-2010)
- Employee Pay and Farning Codes [pdf Format](Updated: 01-21-2011)
- Banner HR Environment (Color) [pdf Format](Files & Banner HR Environment)(Updated: Illustrates the components of the environment and their relationships.

In-class Materials for the “All about HR and ePAF” Class:
- Pre-Class Assignment for HR and ePAF [pdf Format](Updated: 10-12-2011)
- Quick Reference Guide to HR and ePAF [pdf Format](Updated: 03-14-2014)
- TTU New Hire Nonexempt TNHNF [pdf Format](Updated: 06-14-2011)
- TTU New Hire Exempt TNHE [pdf Format](Updated: 06-14-2011)
- TTU New Hire Faculty TNNFAQ [pdf Format](Updated: 09-26-2013)

Click for ePAF Refresher Topics:

Click for the “Employee One-time Payment System (EOPS)” Overview:

Training Materials and Reports for Payroll
- Completing, Submitting, and Approving WTE/WLR Forms
- Video Tutorials for Employees and Approvers
- TEAM App Instruction Guides
- Cognos WTE/WLR Reports for Viewing Time and Leave
**Report Modifications**

**FI026A – Advanced Op Ledger Transaction Report** – Modification was made to correct an issue for transactions from HSC.

**FI010 – Balance Sheet by Fund** – The ability to select multiple funds was added.

**Report of the Month**

**HR011 – Pooled Positions with Incumbents by Organization**

This report is used to view the Pooled Positions belonging to an Organization and those individuals assigned to the Position. This report provides the salary budgeted for the position and the annual salary for each person who is assigned to the position as well. This report is useful to ensure that job end dates are in place for those who are assigned to these positions and to see that salaries being paid are within the amount budgeted.

A pooled position is one that can have more than one person assigned to it. Some of the positions that are pooled include that of Instructor, Research Asst. – Grad Student, Teaching Asst., Graduate Asst., Student Asst., Non-Tech Employee and Temporary Worker to name a few.

**Parameter Page**

Select the Chart of Account followed by the Budgeted Organization that you need to see the details for. The Budgeted Organization is the Organization that is funding the salary for those assigned to the pooled position. If you do not select an Organization, the report will return details for all Organizations that you have permission to view.
The report output is shown on the following page.

The HR011 Report displays as shown below:

Position Information

The top row of this report provides details regarding the Position.
- The Position number along with the description of the position is shown
- The amount budgeted for the Position is shown in the second column
- The FTE for the position followed by the Fund, Organization, Account and Program supporting the salary is shown next
- The Salary Budget shows the dollar amount of the salary being supported by the FOAP, followed by the percent of the salary being supported by the FOAP. In the example above, only one FOAP is supporting the salary, so the Salary Budget equals the Amount Budgeted. If there are two or more FOAPs supporting the salary, the Salary Amount Budget will display as shown below. Note that the Amount Budgeted (second column) remains the same. That is the Amount Budgeted for the Position identified in the first column. The salary budget is different based on the dollar amount of salary being supported by the FOAP displayed on that line within the report. If you add the Salary Budget shown for each FOAP, it will equal the Amount Budgeted displayed in the second column.
Incumbent Information
The bottom section of the report provides information about the Person assigned to the Pooled Position displayed in the top section of the report.

- The R-number and employee name are displayed in the first two columns
- The Job FTE for the employee is shown in the third column
- The Annual Salary for the employee is shown in the fourth column. This is the amount the individual would receive if the assignment is for twelve months.
- The FOAP supporting the Salary is shown following the Annual Salary.
- The Job Begin Date is displayed followed by the Job End Date. In the example above, the employee is working from 01/01/14 to 05/31/14, which is a 5 month period. The Annual Salary amount is 16,320 yet the Budgeted amount for the position shown in the top section of the report is $13,750. The actual amount being expended for the employee assigned above will be $6800.

Usually more than 1 person is assigned to the position, and with multiple employees, the Job FTE, Annual Salary well as Job Begin and End Dates will most likely vary for each employee. An example is shown below:
Quick TIP – COGNOS

Have you ever ran a report and then needed to execute the same report with different parameters? The “Return to Parameter Option” will allow you to change the prompt page information without having to navigate back through Cognos to your report. It will also retain the original parameters you provided, for fast and easy re-submission.

Return to Parameter Option

In the upper right section of an executed report is an icon in the shape of an arrow:

Click this icon to return to the parameter page of the report that is executed. When returned to the parameter page, the parameters entered will display.

This is useful when the executed report does not provide report output.

Select this icon to return to the parameter page to review the parameters entered. Often a keying error is discovered.

This return to prompt tool is also useful if you want to run the same report but for a different set of parameters. Rather than going back to the folder the report is located in and executing from that location, simply click the icon and then enter in a new set of parameters.

The screen shot below shows where this is located within a report: