In an effort to provide a higher level of transparency and to better inform the work base from all institutions in all levels of employment, the office of Administration and Finance Information Systems Management (AFISM) will begin sending out a monthly e-Newsletter. The goal of this newsletter will be to keep the campus informed of: future developments, current projects, and other information that may help improve daily operating processes and provide some business insight.

As well as providing services for various reporting needs in 2011, AFISM provided 4055 hours of training to 973 employees and created over 40 new reports, in addition to numerous report modifications. 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 2012. Below you will find a high-light of these 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 TO KNOW - APRIL 2012 Edition

Quick TIP – COGNOS

Do you sometimes wait for a report to run and then once the report displays you wish you had ran it in another format (i.e. excel, PDF)? Or, do you want to send it directly to your email? Rather than waiting for the report in your browser? Go to the Quick Tip (last page of this announcement) to find out how.

Coming Soon

AFISM PROJECT PORTAL – AFISM is developing and beginning to employ an in house project portal to monitor the progress and updates for all of our projects. When the internal implementation has been completed the Client View of the project portal will be launched. The Client View will allow the end user to submit new project requests, monitor their requests, and communicate with the developer assigned to their specific project(s).

HR115 Expiring Sponsored Projects Report – Automatically e-mailed monthly, this report notifies key individuals associated with sponsored projects (i.e. the responsible accountant, PI or Chairperson) that there are employees still appointed to a project whose end-date is approaching. Notifications are sent out in 90/60/30 day increments prior to the end date. There will also be an option to run this report without sending the emails for analysis and administrative review.

HR Exit Interview Email/Web Application – AFISM is working with Human Resources to develop an online exit interview interface. The application will identify those needing to receive the exit interview and give the exiting employee the ability to provide their feedback online. More details to come.
**Online FERPA training** - This online training application is in the second testing phase and we hope to see it go live in a couple of weeks. It will be used for any department that would like their employees to have a refresher, new employees working with the student side, and also anyone that would like to gain access to either the Student Banner INB, Xtender –Student, or Student Cognos reports.

**Cognos Reporting class focusing on Grant Reports** - AFISM is working in conjunction with SPAR to develop a class which will provide an opportunity for those who work with grants to learn about what Cognos Reports are available to assist them with their information needs. A TechAnnounce will be sent when the class is available for enrollment.

### Development and Support

**New ePAF Training Handout** - How do you know which version of the ePAF Approval Categories (Nonexempt, Exempt, or Faculty/GPTI/TA) to select? Every title in the Pay Plan has an Employee Class Code with the answer to this question. To assist new ePAF Originators select the correct ePAF version based on the Employee Class Code found with the titles in the Pay Plan, a new handout is being used during the HR/ePAF class to illustrate which version to select based on the Employee Class Code.  

**Training Classes in Progress** - A series of Summer ePAF Appointments classes is underway for ePAF Originators who will enter appointments for summer school. Several classes have been conducted and more are on the AFISM schedule. If you didn’t get to attend the early classes, there is still time before Summer School starts to enroll in a class!  
Class Registration Link -> [http://www.depts.ttu.edu/afism/AFISMClassRegistration/ClassRegistration.aspx](http://www.depts.ttu.edu/afism/AFISMClassRegistration/ClassRegistration.aspx)

**Upcoming Training Classes** - Budget Prep is around the corner, but will you be ready? When the timeline for Budget Prep is announced (usually in mid- to late-May), a short schedule of classes will be offered to assist campus departments in their budget preparations: training classes for the new preparer, refreshers for the experienced preparers, and workshops for hands-on assistance with a budget analyst:

- **Budget Prep Training** - This class is for the new budget preparer. The class is a presentation of the Budget Prep reference documents and procedures. (approximately 2 hours)
- **Q&A Refresher for Budget Prep** - For experienced preparers who want a quick overview, with opportunities to ask questions. (approximately 1 hour)
- **Budget Prep Workshop** - If you need assistance with your budgets, you can select a time to meet with a Budget Analyst in a hands-on meeting.
Application and Reporting News

New Reports:

- **FI040A – Advanced Operating Ledger Transaction Report by FOP.** This report provides the user with many more options than the basic FI040 report. To view a specific date range, this report allows both the beginning and ending posting period to be selected. Enhanced options for Fund selection include the ability to execute by Fund Category (multi-select functionality), Fund Class (multi-select), and by one or more funds. Within the Organization hierarchy, the report can be executed by Organization Department, Organization Section, or Organization; all of these options are supported with multi-select parameter capability. Account options now provide multi-select option for account code and a parameter to select an account type. Program Code parameter offers multi-select capability as well. The final addition to the parameter page is the option to select a specific transaction type for the report output. This advanced version provides the user the ability to better select the needed output without having to run the FI040 report multiple times to get the data or to do a lot of data manipulation within an excel format.

- **FI004S - Revenue Expense Budget by FOP Summary.** This is an enhanced version of the FI004, allowing for running at the various levels of the Fund and Org Hierarchies. This can be executed at the Fund Level, The Fund Category, Fund Class, with multi-select capability within the various Fund Levels. For the Organization, it can be execute by Division, Area, Department, Section, or Organization, as well as multiples of these. The Report provides a Revenue Expense Budget Summary by FOP for the selected parameter, with drill down capability to for details at the FOP level, by budget pool.

Finance Report Updates:

- **FI142 – Total Spend by Vendor.** An additional parameter option has been added for both Fund and Organization which provides the capability to choose more than one fund or more than one organization when executing this report. The parameters selection boxes have been re-arranged just slightly with the choice of including PO number or not being placed at the top of the report while the Date Range parameter has been moved to the lower section of the report.

- **FI002 – Revenue Expense Budget Pools by FOP Report.** In this report we modified the parameter for “Fiscal Period to End Report” by providing a drop down select box. This provides a visual identifier for the fiscal period being selected. For those that prefer using a text prompt, the desired fiscal period can be typed in the parameter box, over the select statement rather than using the drop down and scrolling to find the desired choice.

- **FI010 – Balance Sheet by Fund Report –** The report can now be executed at the Fund Manager level rather than just the fund level. A parameter to execute the report by Fund Manager has been added to this report.

- **FI033 – Grant Information Worksheet.** This report has been modified with the addition of a parameter which provides the option to run by College / Division. This then shows all grants for that College / Division.

- **AR002 – Student Accounts Receivable Expenditure Detail -** An additional Parameter option providing the ability to select “Academic Year” has been added to this report, allowing information to be requested for the entire year rather than having to execute this report multiple times to get that information.
HR Report Updates:

- **HR047 – Payroll Expenditures and Encumbrance Report.** The parameter page has been re-designed to provide access to all parameters without scrolling. The Fund parameter has been modified to be a select and search. This allows to search on the first few characters of a Fund code as well as to select more than one fund to include in the report. The fiscal Year Posting Period parameter has been modified to a drop down and now has the month as well as the pay period identifier. We expect that these changes will make the report easier to use with the parameter changes to the Fiscal Year Posting Period and provide more information with a single execution with the change to the Fund parameter.

- **HR005 – Departmental Payroll Register Report.** An additional parameter for Organization Code has been added to this report. Now the user can choose to type in the organization code or can use the select box, choosing more than one or more organization codes. If running for just one organization, this takes away have to scroll through the list of organization codes displayed to find the desired code. The field for TechID (R-Number) has been placed just below the Organization Code select box. Previously it was the final prompt and was not real visible to the report user without scrolling a bit within the parameter page.

- **HR035 – Employee Search Report** - Two date range fields have been added to this report. One allows the user to request to view jobs ended after a selected date and the other allows the user to request to view employees terminated after a selected date. These parameters can be used independently or in conjunction with any or all other parameters. The addition of these parameters allows for the ability to focus on selected job and employment information without have to execute the report and then do further data elimination in excel.
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Run with Options

Prior to executing a report, rather than clicking on the report link, select the blue arrow within the “Actions” column, displayed within the red box below:

Once the blue arrow (above) is selected a new window opens.

- Format Option: Open the drop down to choose the desired format for report output.
- Delivery: Choose the radio button “Send me the report by email”
- Run – Select Run

Choose desired parameters on the parameter page of report and select finish.