Training Checklist

Administration & Finance Information System Management (AFISM) is pleased to welcome you to Texas Tech University! AFISM offers training in 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, select the Training link to access the Registration site, Training Materials and Training Videos.

◆ **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.

◆ **PRE-REQUISITE to Finance, Procurement, Budget & Cognos Classes (below).**

Finance, Procurement and Cognos classes require completion of this pre-requisite before registering.

- 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**

- 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)
**Budget**

- **Budget Manage and Revisions**—For administrators who create, revise and reconcile budgets (Pre-req FM 101)
- **Budget Prep Training** (Only Offered in the Spring) - For administrators who create and approve budgets for the New Year

**Procurement**

- **TechBuy**—Those who will use the TechBuy System for purchasing of behalf of a department (Pre-req FM 101)
- **Travel Training**— Those who will be submitting travel applications and vouchers
- **Citibank Procurement Card Training**—For the Cardholder / Reconciler

**Cognos Reporting**

- **Introduction to Cognos**—Those who will use the Cognos Reporting system. Pre-Req to all other Cognos classes.
- **Basics of Finance Reporting**—Those who will be using Cognos Finance Reports. Provides learning of terminology, financial processes, introduction to systems and reports.
- **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 FOP. 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, this includes reports of expenditures, histories, and encumbrances. Must complete the HR/Payroll class & All About HR and ePAF before registering.

**Property Inventory**

- **Property Inventory**—Those responsible for doing the property inventory for their departments.

**Xtender**

- **Xtender Scan & Index**—Faculty / Staff who will be scanning /indexing departmental documents into the Xtender system