

AFISM NEWS

March 2020

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AFISM March Class Schedule

Class Name	Date
Financial Reporting - Budget Reports	3/2 & 3/16
Financial Reporting - Transaction Reports	3/3 & 3/17
Cognos Grant Reporting	3/3 & 3/19
Banner 9 Finance Navigation	3/4 & 3/25
EOPS: Employee One-time Payment System Overview	3/4 & 3/27
Financial Management 101: Introduction to FOAP Codes	3/5 & 3/23
Procurement Reporting in Cognos	3/5 & 3/17
Introduction to Cognos	3/5 & 3/25
Xtender - Scanning and Indexing	3/5 & 3/25
HR Reporting - Employee Appointment Reports	3/9 & 3/23
TechBuy Shopper	3/10 & 3/24
HR Reporting - Payroll Reports	3/10 & 3/23
Account Code Training for Expenditures	3/11 & 3/27
Budget Management and Revision	3/12 & 3/27
Travel Training for Travel Preparer	3/12 & 3/31

If you are interested in enrolling into one of the sessions above, please log in to Cornerstone. It can be accessed using this link: <https://apps.afism.ttu.edu/enterRegistrationSystem/>.

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

The Question ?

How do I get Xtender Access?

During our hands on training, Xtender students learn how to navigate the system using our training application/folder. Once staff returns to the office, we are always happy to answer questions and assist our users on how to upload, process, and view documents.

Unfortunately, AFSIM staff cannot grant users access to any academic or functional department's application/folders, nor can we create a new application/folder for you. For assistance with these issues, please reach out to Enterprise App Security (EAS).

- ◆ For **employees** wishing to gain access to their departments Xtender applications, please ask your supervisor to request/grant you access.
- ◆ For **supervisors**, if you wish to grant access to your department's Xtender applications, please complete a [Jira request](#).
 - ◆ Note: If you are not the "owner" of the application/folder, then EAS will confirm the request with the owner before granting access.
- ◆ If you wish to **create a new Xtender application/folder**, submit a [Jira request](#) to EAS.
 - ◆ Creating new Xtender applications/folders is a great way to reduce the amount of papers stored in your office and can help you empty out your file cabinets.
- ◆ If you do not have access to submit a Jira request, please email EAS directly at EnterpriseAppSecurity.IS@ttu.edu

Good to Know

For help using the Xtender system, please visit our [Xtender Help Guide](#).

It contains information about...

- [Clearing Web Browser Cache](#)
- [Video Resources](#)
- How to [email](#) or [export](#) documents
- [Attaching ePAF documents](#)



Changes to Tax Exemption Certificate Process

Procurement Services announces changes to the handling of Tax Exemption Certificates. These changes went into effect on January 1, 2020. Departments will no longer route this form through Procurement Services and a completed form *should not* be forwarded to Procurement Services. Going forward **the department making the purchase** is responsible for:

- ◇ Filling in the tax exemption certificate with the required information
- ◇ Signing the tax exemption certificate
- ◇ Providing the completed certificate to the vendor

Access to the Tax Exemption Form is no longer available to everyone, but is now behind the eRaider shim, which requires your eRaider ID and password in order to access it. For more details: <https://www.depts.ttu.edu/procurement/resources/TaxExemption/TaxExemption.php>

ePAF Training and Questions

ePAF training is now being conducted by Human Resources.

- ◆ To register for their classes, log into the [Cornerstone](#) system and look for “ePAF Training”.
- ◆ The new [ePAF Training Document](#) and [Job Aids for ePAF Preparers](#) can be found on the [Human Resources Website](#) under the heading Managers and Supervisors.
- ◆ If you have any questions about ePAFs or ePAF Training, please contact hrc.compensation.operation@ttu.edu

AFISM Training Checklist (updated)

This guide is designed to assist employees and supervisors in creating an effective training schedule. In it you will see our suggested grouping of classes, a listing of classes and descriptions, as well as course pre-requisites for certain classes. We feel that it is helpful to print this document and then mark those classes that you need to take as you plan your training. This is found on the AFISM Training website: <https://apps.afism.ttu.edu/training/wp-content/uploads/2016/08/afism-training-checklist.pdf>

**Continued on the
Following Pages**



AFISM Training Checklist cont.

No Pre-requisite: These classes are for immediate registration and do not have a pre-requisite:

- Budget Prep Training (offered once a year in May)
- Citibank Procurement Training
- Employee One Time Payment System Overview (EOPS)
- Financial Management 101
- Introduction to Cognos
- Introduction to Financial Transaction System (FiTS) – Online Training Module
- Property Inventory – Online Training Module
- Travel Training for Travel Preparer
- Xtender Scanning & Indexing

Pre-requisites: Below are the “Pre-requisite” courses with the classes they support.

Financial Management 101: Introduction to the FOAP Codes - Completion of this class is required before registering for:

- Account Code Training for Expenditures
- Banner 9 Navigation
- Budget Management and Revision
- Cognos Finance Reporting classes
- TechBuy for the Shopper

Introduction to Cognos – This class must be completed before registering for any Cognos Reporting Classes

All About HR and ePAF – This is a pre-requisite for all HR Reporting classes.

Suggested Class Order: The grouping below is a suggested order for classes, going from top to bottom within the class category.

TechBuy

- Financial Management 101
- Account Coding for Expenditure
- TechBuy

Cognos Finance Reporting Classes

- Finance Management 101
- Introduction to Cognos
- Financial Reporting – Budget Reports
- Financial Reporting – Transaction Reports
- Procurement Reporting in Cognos
- Cognos Grant Reporting

HR Reporting Classes

- All About HR & ePAF (offered by Human Resources)
- Introduction to Cognos
- HR Reporting Employee Appointment Reports
- HR Reporting Payroll Reports

AFISM Training Checklist cont.

Below is AFISM's catalog of courses for different business categories. The pre-requisites which must be completed prior to registering for a certain class are listed beneath that class.

In addition to in-person trainings, AFISM provides other learning resources which can be accessed from the A&F Work Tools tab of Raiderlink, within the AFISM Channel:

Knowledge Base – a data base of frequently asked questions about various business operations.

Resources – a file of job aids for different business procedures.

AFISM Training Website - The online catalog of classes and class materials.

Cornerstone – the application used for enrollment and cancellation of classes. You will find your training schedule and transcript in Cornerstone.

BUDGET

Budget Management and Revision – for those whose role is to manage and revise budgets.

Pre-requisite: Financial Management 101.

Budget Prep Training – for those whose role is to create and approve budgets for the new fiscal year (offered in the spring only).

COGNOS REPORTING

Introduction to Cognos – Overview and navigation of the Cognos Reporting System.

This Course is a ***pre-requisite*** for ALL Cognos classes.

Financial Reporting Budget Reports – For those responsible for monitoring departmental budgets.

Pre-requisites: Introduction to Cognos and Financial Management 101.

Financial Reporting Transaction Reports – For those who reconcile accounts and monitor expenses.

Pre-requisites: Introduction to Cognos and Financial Management 101.

Cognos Grant Reporting – For those who manage the financial activity on grant accounts.

Pre-requisites: Introduction to Cognos and Financial Management 101.

Procurement Reporting in Cognos – For those who monitor encumbrance activity on a FOP. Includes encumbrances created using the TechBuy and Travel Systems.

Pre-requisites: Introduction to Cognos and Financial Management 101.

HR Reporting Employee Appointment Reports – For those who create ePAFs and who monitor job and salary assignments for an organization.

Pre-requisites: Introduction to Cognos and All About HR & ePAF.

HR Reporting Payroll Reports – For those who track payroll activity for FOPs, including reports of expenditures, histories and encumbrances.

Pre-requisites: Introduction to Cognos and All About HR & ePAF.

AFISM Training Checklist cont.

FINANCE

Financial Management 101: Introduction to FOAP Codes – Overview of TTU's financial structure

This course is a **pre-requisite** for *TechBuy, Finance and Cognos Financial Reporting* courses.

Banner 9 Navigation – For those in a department that uses Finance Forms in Banner.

This class must be attended in order to gain access to the Banner System.

Pre-requisite: Financial Management 101

Introduction to Financial Transaction System (FiTS): Online Training Module – For those who will be submitting Cost Transfers, Revenue Journal Vouchers (JV) or Intra-Institutional Vouchers (IV).

HUMAN RESOURCES (HR) / PAYROLL

EOPS – Employee One Time Payment System Overview – How to perform the procedure for payment an employee for a one time task or a short project.

PROCUREMENT

TechBuy Shopper – For those who will use the TechBuy system to make purchases on behalf of a department.

Pre-requisites: Financial Management 101

We encourage Account Code Training for Expenditures as well.

Travel Training for Travel Preparer – For those who will be submitting travel applications and vouchers.

Account Code Training for Expenditures – In depth discussion of terminology and special purchase procedures when choosing account codes for expenditures.

Pre-requisite: Financial Management 101

Citibank Procurement Card Training – Offered by Procurement Services for the Cardholder / Reconciler.

PROPERTY INVENTORY

Property Inventory Online Training Module – Optional training course for those responsible for completing / managing the property inventory for their departments.

XTENDER

Xtender – Scanning & Indexing – For Faculty/ Staff who will be scanning and indexing departmental documents into the Xtender system or who will be viewing documents in the system.

Coming Up

Budget Prep Classes

Budget Prep classes have been planned for...

- *Thursday, May 7th from 2:00-4:00pm*
- *Friday, May 8th from 10:00am-Noon*

Budget Prep **Workshops** are currently planned for the following week.

Registration for the Budget Prep Class and Workshops will open in mid-April.

NEED OUR SERVICES?

AFISM is here and eager to support the growing data and technology needs of the University. Our services include training, report writing, data delivery, data presentation, web development, and much more. Should you have any questions of how AFISM might assist your department, please do not hesitate to reach out.



Contact Us

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Visit us on the web:

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

AFISM Training Website:

<https://apps.afism.ttu.edu/training/>

AFISM Portal