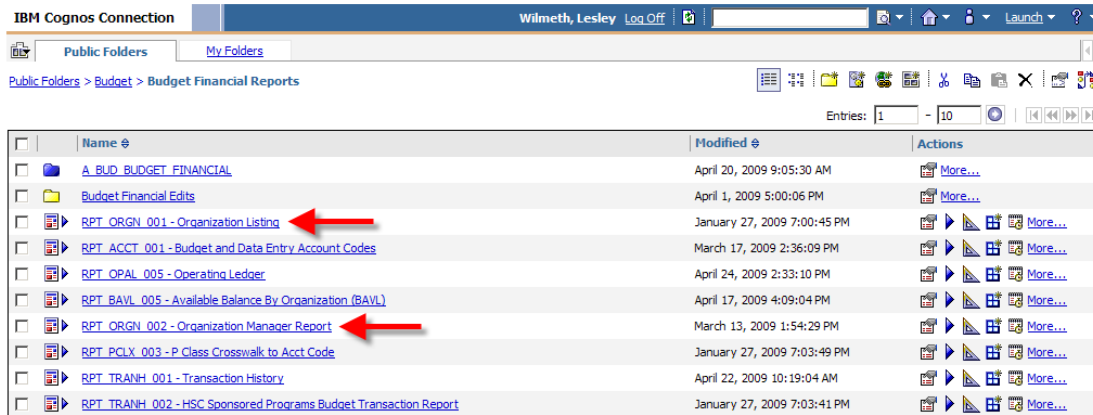


BUDGET PREP SECURITY

WHO CAN SET BUDGET PREP SECURITY?

Only **Organization Managers** have the ability to set Budget Prep security.

You can run 2 reports from the Budget Financial Reports folder to find the organization manager, or you can contact the Budget Office.

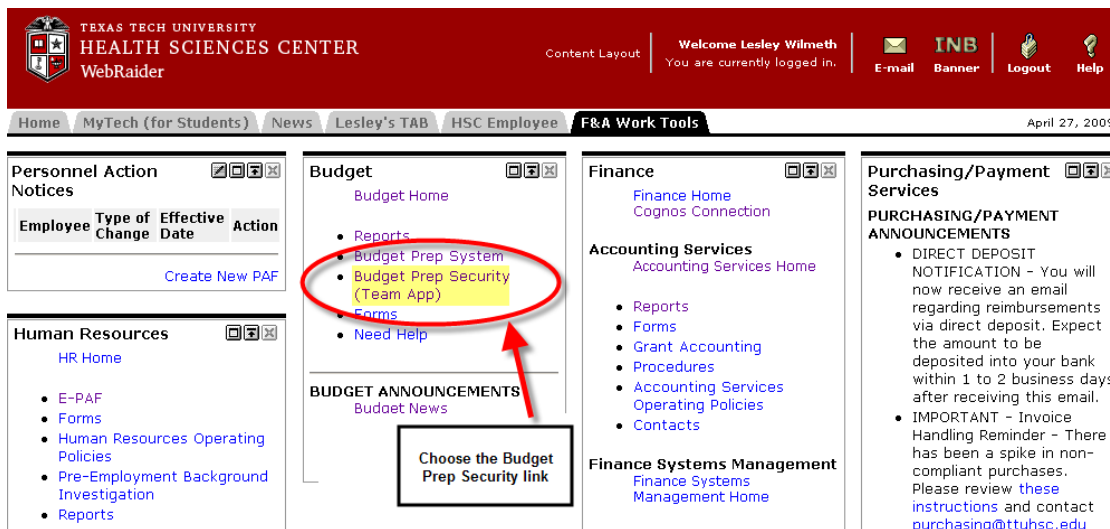


Name	Modified	Actions
A_BUD_BUDGET_FINANCIAL	April 20, 2009 9:05:30 AM	More...
Budget Financial Edits	April 1, 2009 5:00:06 PM	More...
RPT_ORGN_001 - Organization Listing	January 27, 2009 7:00:45 PM	More...
RPT_ACCT_001 - Budget and Data Entry Account Codes	March 17, 2009 2:36:09 PM	More...
RPT_OPAL_005 - Operating Ledger	April 24, 2009 2:33:10 PM	More...
RPT_BAVL_005 - Available Balance By Organization (BAVL)	April 17, 2009 4:09:04 PM	More...
RPT_ORGN_002 - Organization Manager Report	March 13, 2009 1:54:29 PM	More...
RPT_PCLX_003 - P Class Crosswalk to Acct Code	January 27, 2009 7:03:49 PM	More...
RPT_TRANH_001 - Transaction History	April 22, 2009 10:19:04 AM	More...
RPT_TRANH_002 - HSC Sponsored Programs Budget Transaction Report	January 27, 2009 7:03:41 PM	More...

GRANTING BUDGET PREP SECURITY

STEP 1:

Go to your Webraider portal, F&A Work Tools Tab. Choose the Budget Prep Security link under the BUDGET section.



TEXAS TECH UNIVERSITY
 HEALTH SCIENCES CENTER
 WebRaider

Welcome Lesley Wilmeth
 You are currently logged in.

Home MyTech (for Students) News Lesley's TAB HSC Employee **F&A Work Tools**

Budget
 Budget Home

- Reports
- Budget Prep System
- **Budget Prep Security (Team App)**
- Forms
- Need Help

BUDGET ANNOUNCEMENTS
 Budget News

Choose the Budget Prep Security link

Finance
 Finance Home
 Cognos Connection

Accounting Services
 Accounting Services Home

- Reports
- Forms
- Grant Accounting
- Procedures
- Accounting Services Operating Policies
- Contacts

Finance Systems Management
 Finance Systems Management Home

Purchasing/Payment Services
PURCHASING/PAYMENT ANNOUNCEMENTS

- DIRECT DEPOSIT NOTIFICATION - You will now receive an email regarding reimbursements via direct deposit. Expect the amount to be deposited into your bank within 1 to 2 business days after receiving this email.
- IMPORTANT - Invoice Handling Reminder - There has been a spike in non-compliant purchases. Please review these instructions and contact purchasing@ttuhsc.edu

STEP 2:

Select to Request Access to Banner Finance, Human Resources or Student.

The screenshot shows the Banner system interface. At the top left, the user information is displayed: "Userid: LWILMETH" and "Instance: TTUSPRD". A "Sign Out" button is visible in the top right corner. The main heading is "Quick Links". Below this, there is a "Welcome to the TEAM!" message followed by the question "What would you like to do today?". A list of links is provided: [Reset Password](#), [View My Banner Access](#), [Request Access to Banner Finance, Human Resources or Student](#), [Use Administrative Tools](#), and [Use Reports](#). A red arrow points to the "Request Access to Banner Finance, Human Resources or Student" link. The left sidebar contains a navigation menu with items: Home, View My Banner Access, Reset Password, Access Request, Admin Functions, and Reports.

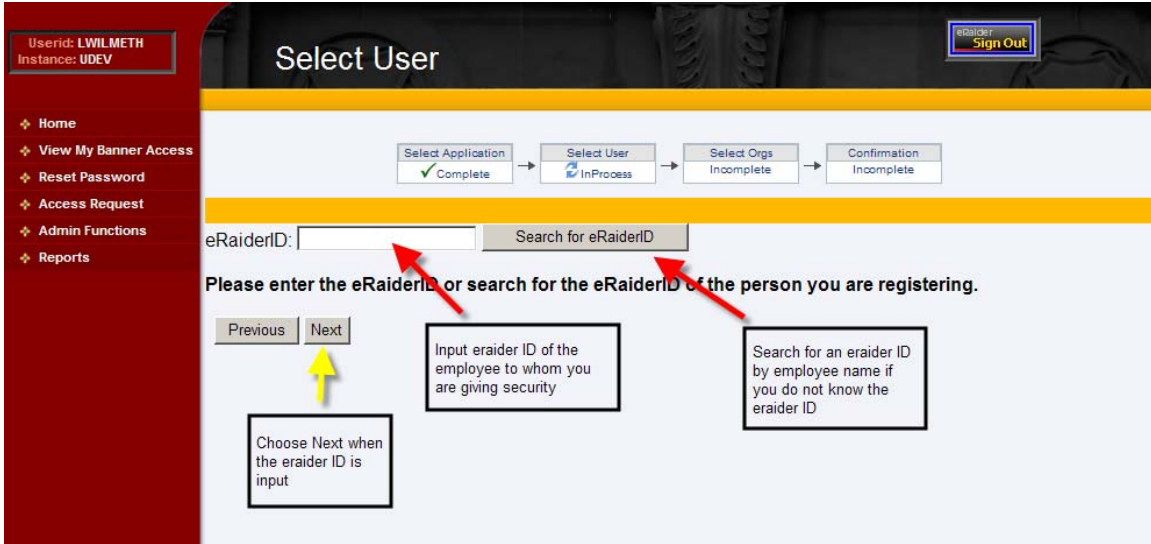
STEP 3:

Select Budget Prep Security Request

The screenshot shows the Banner system interface for selecting an application. At the top left, the user information is displayed: "Userid: LWILMETH" and "Instance: UDEV". A "Sign Out" button is visible in the top right corner. The main heading is "Select Application". Below this, there is a "Select Application" heading followed by a list of options: [HR Security Request](#), [Budget Prep Security Request](#), and [Student Security Request](#). A red arrow points to the "Budget Prep Security Request" link. Below the list, there is a "Note" stating: "If you do not see an option for the system to which you are requesting access, please email eas.is@ttu.edu for further assistance." The left sidebar contains a navigation menu with items: Home, View My Banner Access, Reset Password, Access Request, Admin Functions, and Reports.

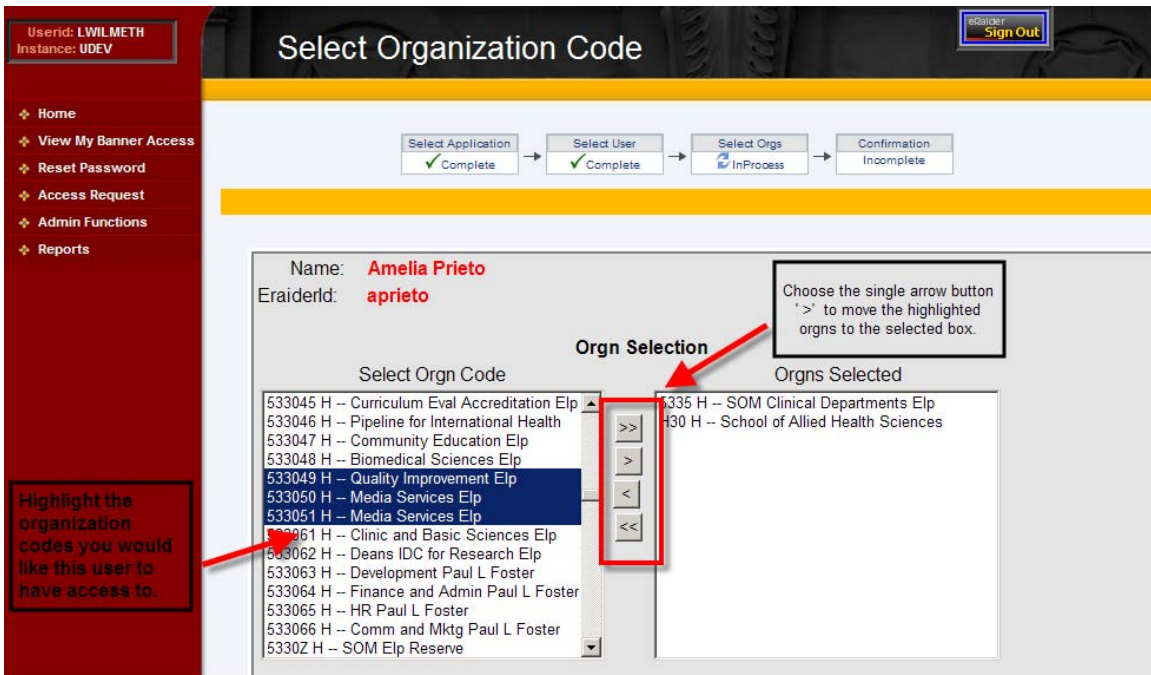
STEP 4:

Input the eraider ID of the employee to whom you are granting security. If you do not know the eraider ID, use the Search for eRaiderID button. Click the Next button to continue.



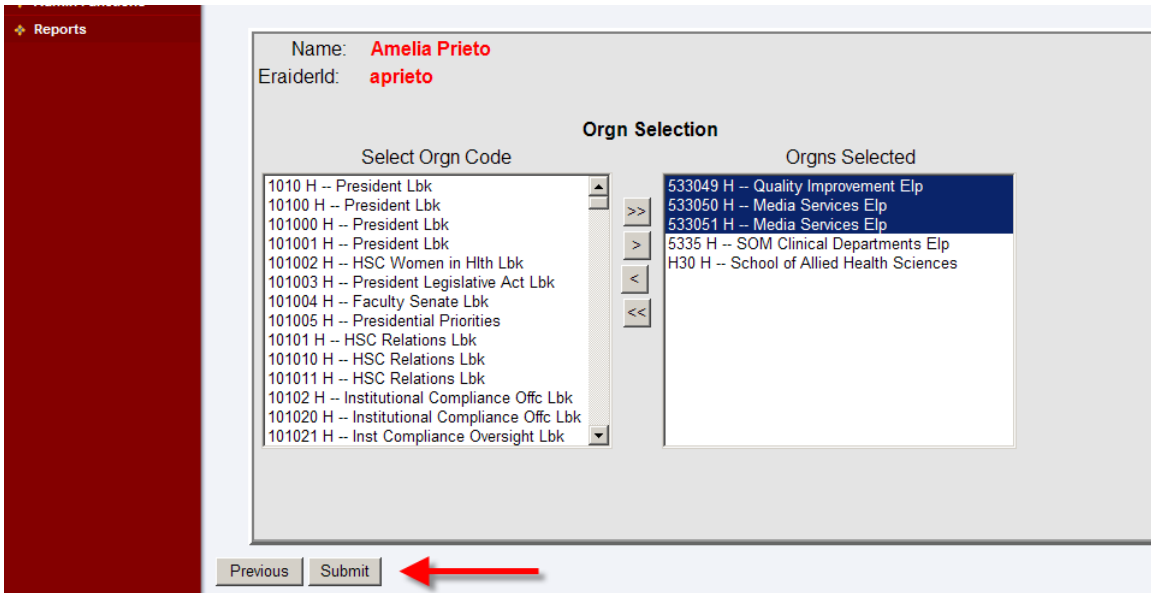
STEP 5:

If you would like the employee to have access to all organization codes in your control, simply click on the double arrow box '>>'. Otherwise, highlight a selection of organization codes and choose the single arrow box '>' to give access to only those orgn codes.



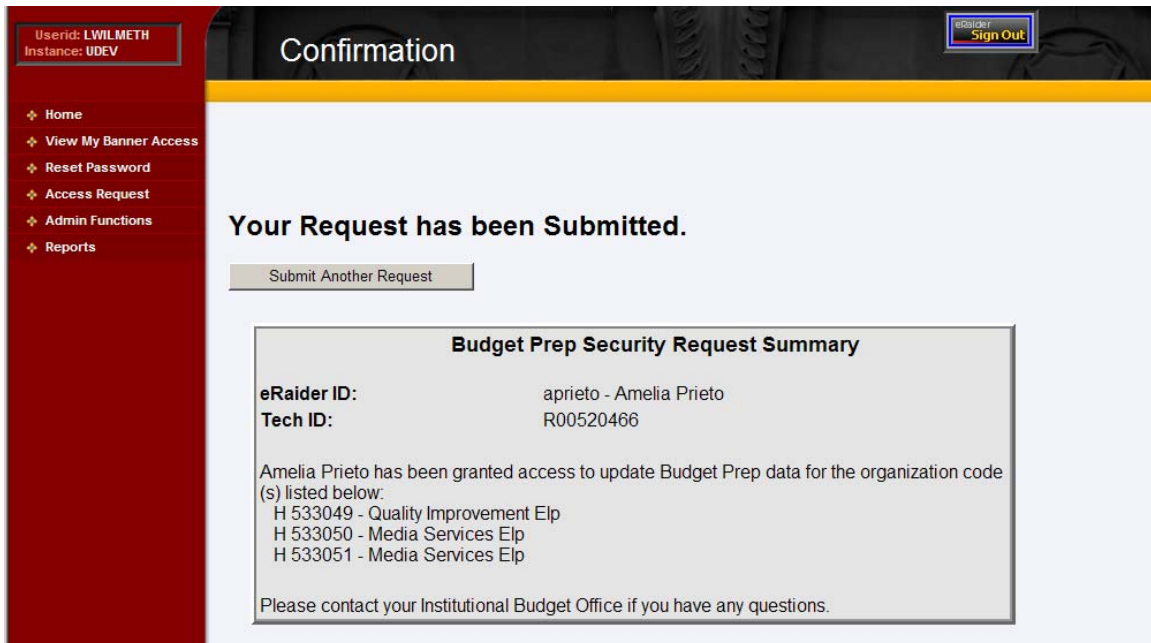
STEP 6:

Then choose the Submit button to add the security.



STEP 7:

You will then be shown a confirmation screen listing the security you have just added. An email will also be sent to both the person requesting the security and the employee to whom security has just been granted.



REMOVING BUDGET PREP SECURITY

Repeat Steps 1 – 4 above.

At Step 5, use the deselect arrows ‘ < ’ and ‘ << ’ to move organization codes from the orgn selected column.

The screenshot displays a web interface for 'Orgn Selection'. On the left, a vertical sidebar contains 'Admin Functions' and 'Reports'. The main content area shows the user's name as 'Amelia Prieto' and ERAIDERID as 'aprieto'. Below this, there are two columns: 'Select Orgn Code' and 'Orgns Selected'. The 'Select Orgn Code' column lists various organization codes, including '1010 H -- President Lbk' through '101021 H -- Inst Compliance Oversight Lbk'. The 'Orgns Selected' column lists codes such as '533049 H -- Quality Improvement Elp', '533050 H -- Media Services Elp', '533051 H -- Media Services Elp', '5335 H -- SOM Clinical Departments Elp', and 'H30 H -- School of Allied Health Sciences'. A red box highlights the '<' and '<<' buttons between the columns, with an arrow pointing to them and a callout box that says 'Use the deselect orgn buttons'. Another red box highlights the '533051 H -- Media Services Elp' entry in the 'Orgns Selected' column, with an arrow pointing to it and a callout box that says 'Highlight the organization codes to remove.'

The follow Steps 6 and 7 above.

BUDGET PREP SECURITY REPORTS

If you would like to know who has access to your organization codes you can find this information in a report.

STEP 1:

Select the Reports link.

Userid: LWILMETH
Instance: UDEV

Home
View My Banner Access
Reset Password
Access Request
Admin Functions
Reports

Select User

Select Application Complete → Select User InProcess → Select Orgs Incomplete → Confirmation Incomplete

eRaiderID: Search for eRaiderID

Please enter the eRaiderID or search for the eRaiderID of the person you are registering.

Previous Next

STEP 2:

Select the report you would like to run.

You can choose to see all users with access to your organization code with “List Budget Prep Report Users”.

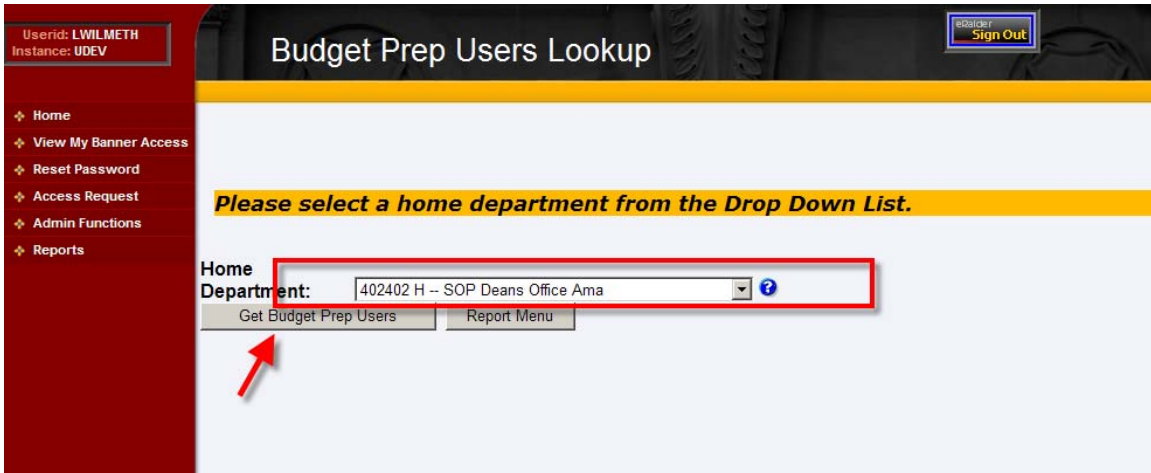
Or you can choose to see all access for one individual with “Budget Prep Access for Selected User”.



List of Budget Prep Report Users:

From the drop down list of organization codes, choose the orgn code that you would like to see the users on.

Then click on Get Budget Prep Users.



REPORT OUTPUT:

You can see more data by changing the page size to 25 or 50. You can also page forward and back with the arrows.

Please select a home department from the Drop Down List.

Home
 Department: 402402 H -- SOP Deans Office Ama

Get Budget Prep Users Report Menu

Use page size and previous and next page arrow to see more data.

Budget Prep Report Users:

Showing 1 - 3 of 3. Page Size: 10 << < 1 > >>

Name	Job Title	Eraider ID	Oracle ID	Tech ID	COAS Code	ORGN Code	ORGN Title
Crystal Davis	Sr Analyst	crdavis	CRD450	R00386068	H	40240	SOP Admin Ama
Gina Stockman	Lead Analyst	gstockma	RXA948	R00207562	H	H402	School of Pharmacy Ama
Penny Harkey	Asst Vice President-Budget	pharkey	FSO914	R00525092	H	H40	School of Pharmacy

You can change the sort order of the report by clicking on each column heading. This example chose to sort in name – alpha order.

Please select a home department from the Drop Down List.

Home
 Department: 402402 H -- SOP Deans Office Ama

Get Budget Prep Users Report Menu

Change sort order by clicking on column headings.

Budget Prep Report Users:

Showing 1 - 3 of 3. Page Size: 10 << < 1 > >>

Name	Job Title	Eraider ID	Oracle ID	Tech ID	COAS Code	ORGN Code	ORGN Title
Crystal Davis	Sr Analyst	crdavis	CRD450	R00386068	H	40240	SOP Admin Ama
Penny Harkey	Asst Vice President-Budget	pharkey	FSO914	R00525092	H	H40	School of Pharmacy
Gina Stockman	Lead Analyst	gstockma	RXA948	R00207562	H	H402	School of Pharmacy Ama

Budget Prep Access for Selected User:

Input the eraiderID of the user you would like to view access for, or use the Lookup feature to search for an eraiderID.

Then select the button Get Budget Prep Users to run the report.

Input eraider

Please type in your desired user.

eRaiderID: smathiso ? Lookup eRaider

Get Budget Prep Users Report Menu

Select Get Budget Prep Users to run the report

REPORT OUTPUT:

Report will show all organization codes a user has access to.

Budget Prep Report Orgs:

Showing 1 - 3 of 3. Page Size: 10 << < 1 > >>

Name	Job Title	Eraider ID	Oracle ID	Tech ID	COAS Code	ORGN Code	ORGN Title
Sheralyn Mathison	Sr Analyst	smathiso	KPE407	R00521930	H	5115	SOM Basic Sciences Lbk
Sheralyn Mathison	Sr Analyst	smathiso	KPE407	R00521930	H	69100	TDCJ Lbk
Sheralyn Mathison	Sr Analyst	smathiso	KPE407	R00521930	H	H53	Paul L Foster School of Medicine