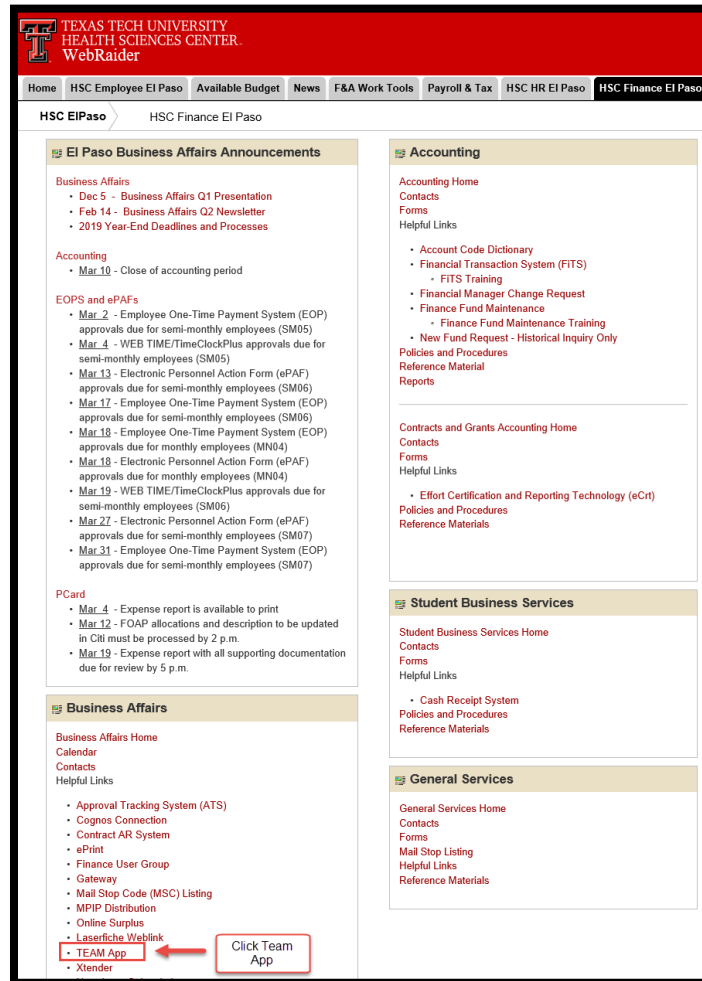# TEAM Application – Security and Finance Registration

The **TEAM Application** is the electronic registration/security process used for HSCEP Financial processes. This registration process allows Fund Managers to register those in their departments who they deem necessary to use online financial applications. Only a Fund Manager will be able to grant access to specific Banner Funds and assign roles to their departmental users for finance applications such as TechBuy and Direct Pay. The **TEAM Application** also provides a means for Orgn (Organization) Managers to assign Financial Alternates for Orgn Approval for Financial applications that use Orgn security for approval routing such as the Budget Revision and New Fund Request applications.

The **TEAM Application** can be accessed from the WebRaider Portal, HSC El Paso Finance tab, under the Business Affairs channel. The **TEAM Application Information** link located under the **TEAM Application** link provides training documentation for the **TEAM Application.**
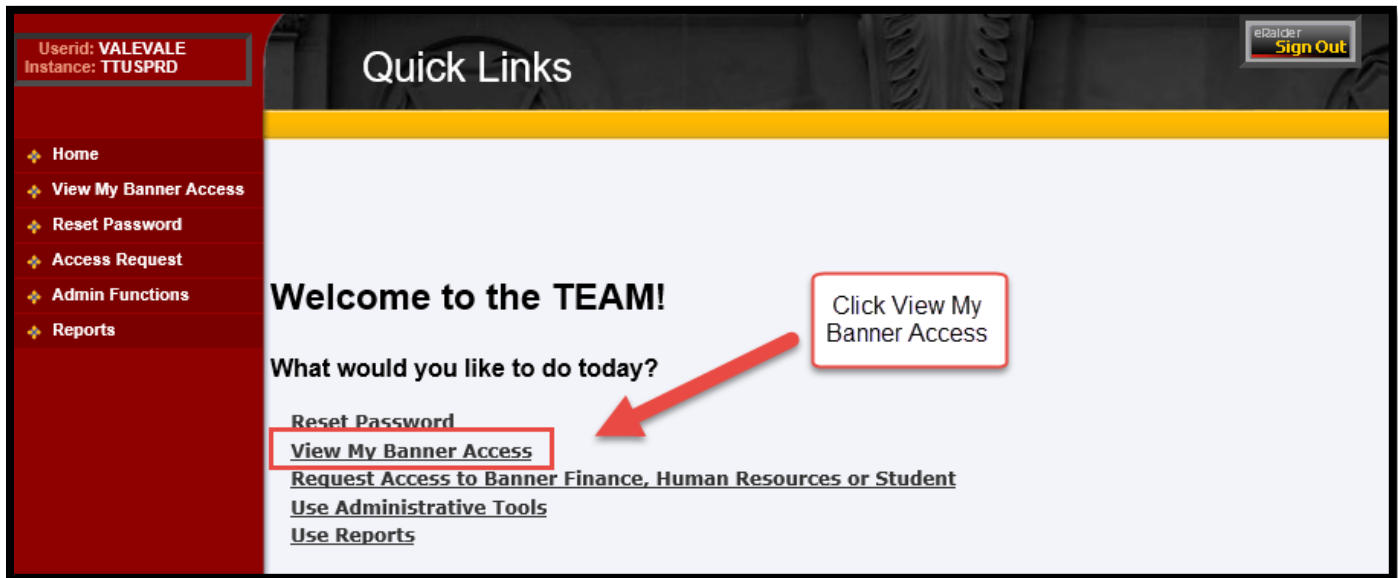
TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER.
EL PASO

Home

The Team Application **Home** page allows you to select applications from the links in the menu bar on the left side of the page or by selecting the applications in the **Quick Links** section.
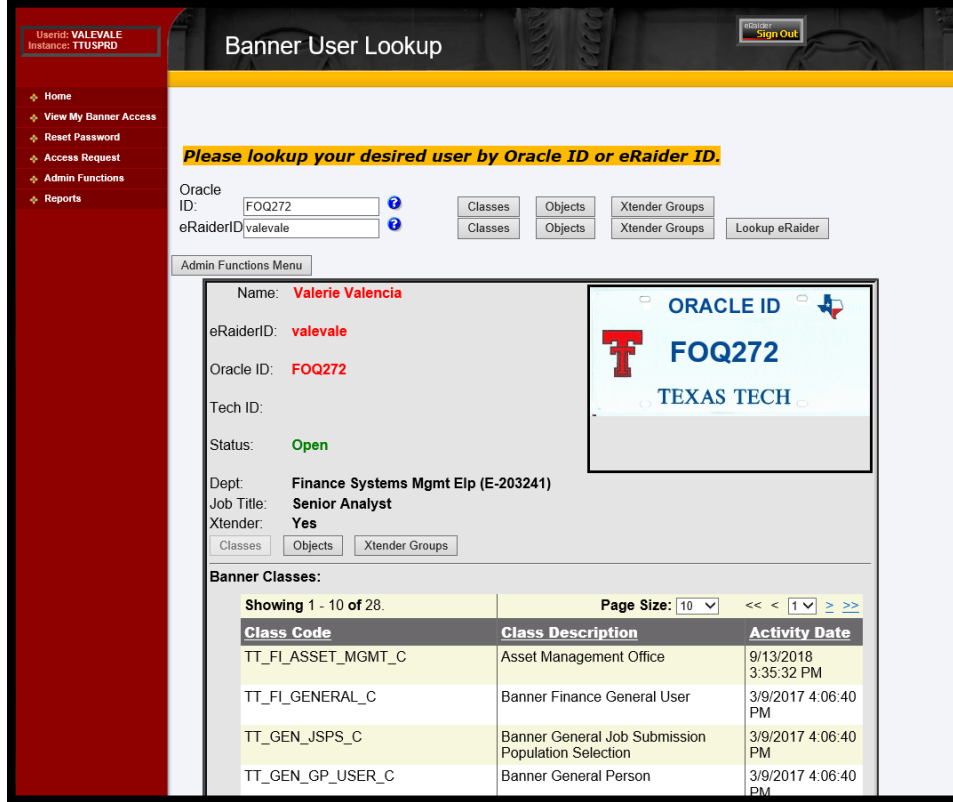

View My Banner Access

To view your Banner access information, from the **Home** page, click on the **View My Banner Access** link in the menu bar on the left side of the page or the link in the **Quick Links** section.

The TEAM application **View My Banner Access** displays the following information:
- Your Name
- eRaider ID
- Oracle ID (often referred to as your Banner "License Plate")
- Tech ID ("R" Number)
- Oracle ID Status (if you do not use ePrint, the Gateway or Banner INB, you will not be assigned to any Banner Classes and the "Status" of your Oracle ID may show as "Inactive" or "Locked")
- Banner Classes (most Departmental users will have very few if any Banner Classes as these relate only to ePrint Security, Gateway Billing Security and INB Banner Security Classes)

Reset Password

To set or reset your Banner password, select the **Reset Password** link from the menu bar on the left side of the page or from the **Quick Links** section of the **Home** page. The **Reset Banner Password** page displays your **Oracle ID** and provides a text box to enter your new password and a button to submit your new password. You must read the **Disclaimer** and know that by logging into the Banner application, you are indicating that you have received, understand and agree to abide by the policies relating to Banner security. The **Password Guidelines** provides the list of rules that must be adhered to when entering your new password.

Enter your new password in the **Password** text box and click on **set password.**

Your password will only be changed in TTUSPRD and will expire every 90 days. You will not receive an email reminder notification to change your password, so it is recommended that you set a reminder in your Outlook Calendar.

TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER.
EL PASO

TechBuy User Access

To request TechBuy user access, click on **Access Request** from the menu bar on the left side of the page. You can also use the **Request Access to Banner Finance, Human Resources or Student** link from the **Home** page **Quick Links**.

The **Select Application** page provides a list of various applications depending on your role assignments. For TechBuy, Financial Managers will automatically be registered as "Approvers" and "Requesters" with full authority to shop and submit orders. Persons with these authorities will not have to register.
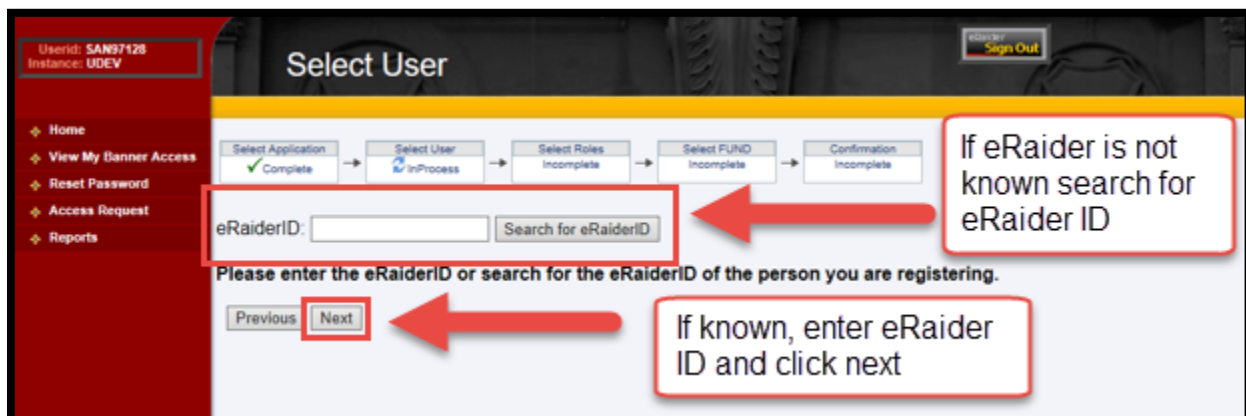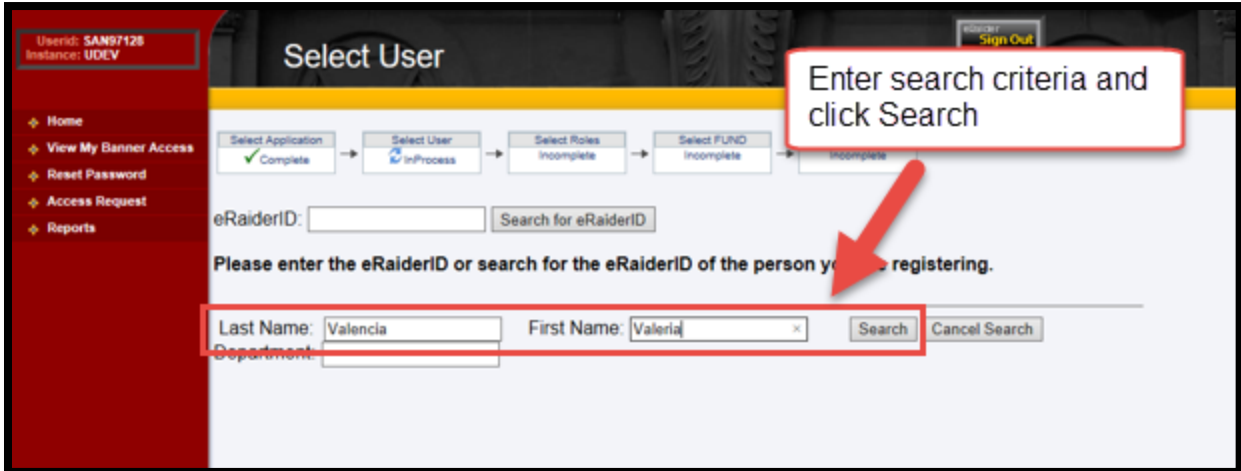
From the **Select Application** page, click on **Financial Security Request.**
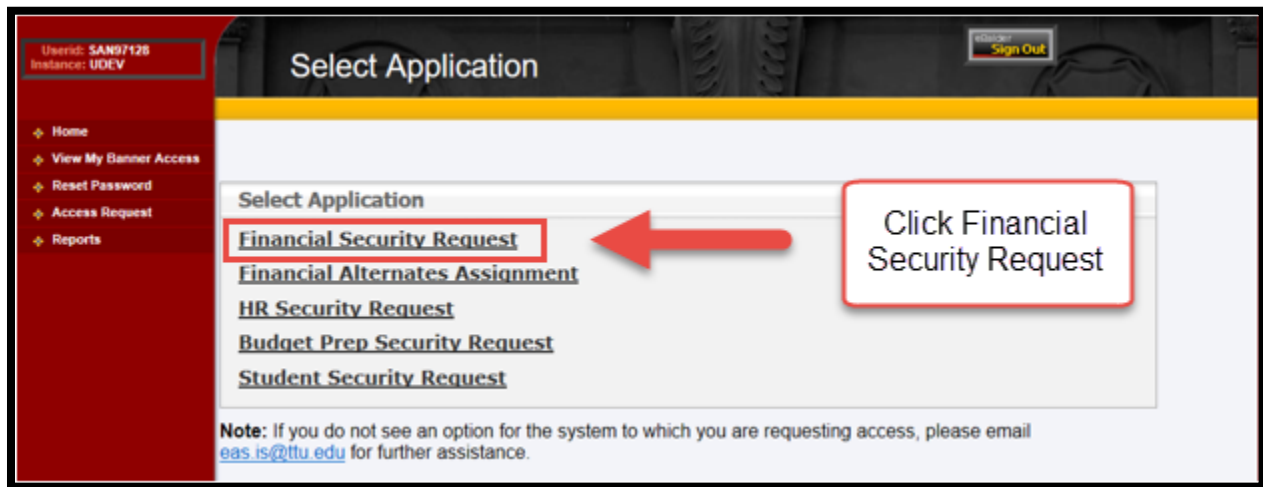
If known, enter the eRaider ID of the employee you wish to register and click on **Next**. If you do not know the eRaider ID, click on the **Search for eRaider ID** button.

You must enter at least the last name of the employee you wish to register. Enter a first name and /or department to reduce the number of results from the search. Once you have entered your search criteria, click on **Search**.
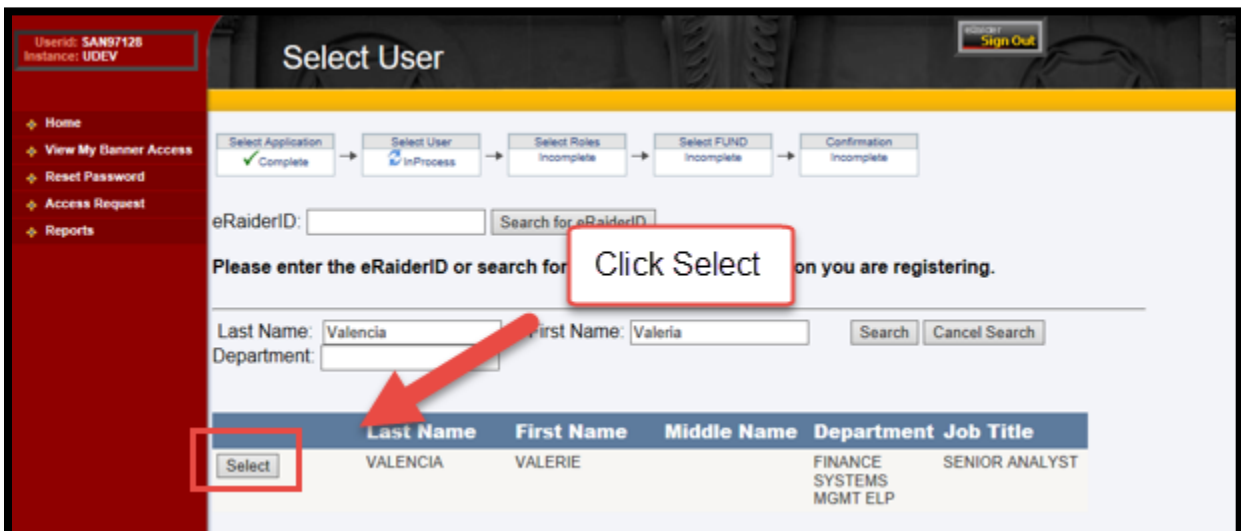
The results of the search should appear below the search parameters. Locate the appropriate employee and click the **Select** button to the left of their name. **Please make sure the employee you are selecting is in the correct department as there could be other employees with matching names.**
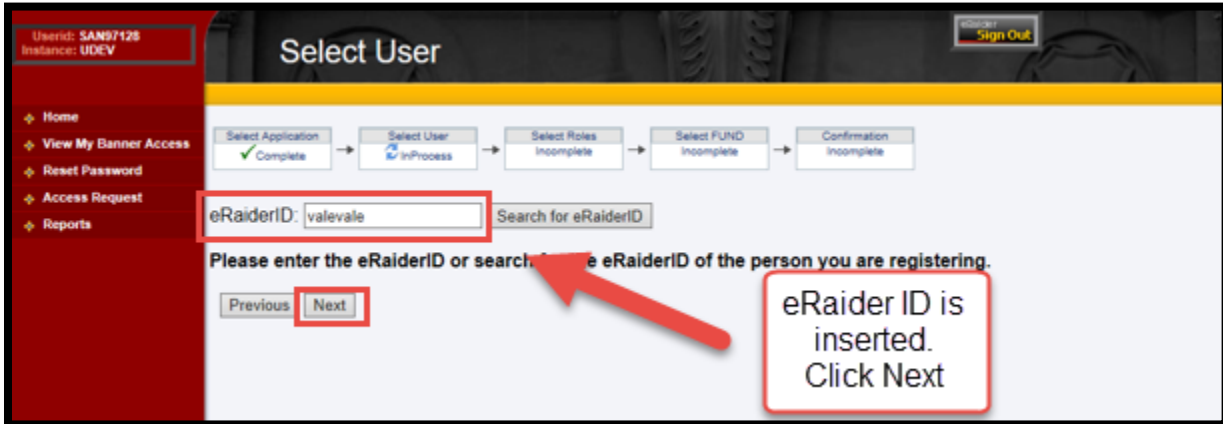
The eRaider ID of the selected employee will now be inserted into the **eRaider ID** field.

Click on **Next**.

There are three roles available to assign to a TechBuy user: **Approver**, **Requestor or Shopper**. If a user is granted different roles on different funds through the TEAM application, the highest role assigned to the user will apply to all authorized funds in TechBuy.

The **Approver** role should be assigned to the employee who has authority to approve:

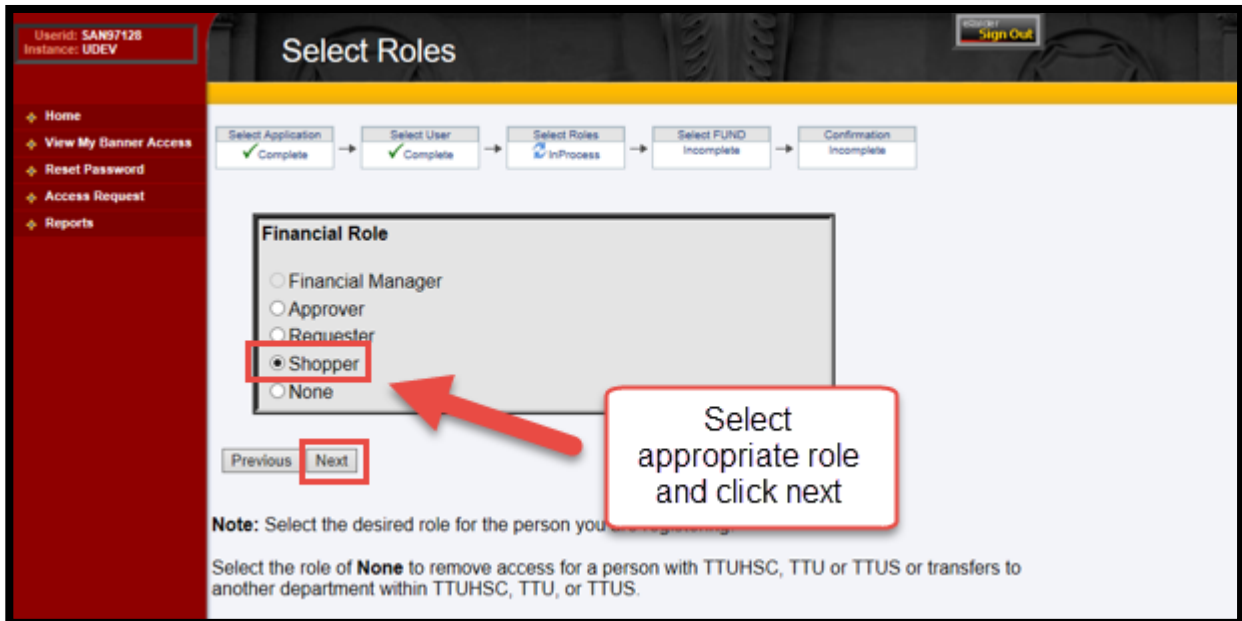- All non-catalog orders submitted by Requesters and Shoppers charged to Banner Funds to which the Approver has been granted authority to approve
- All catalog orders from Shoppers
- Catalog orders of $5,000.00 and above from Requesters.

The **Requester** role should be assigned to those employees who have authority to assign accounting information to a requisition and to submit orders to vendors. Please note that orders of $5,000.00 or greater will be forwarded to a department approver before going out to the vendor.

The **Shopper** role should be assigned to those employees who should have authority to shop and submit a cart to a requisition, but do not have the authority to place the order with the vendor.

The **None** role should be used to deactivate a user. It is important to complete this step for those in your department who were registered but have terminated or transferred to another department within TTUHSC, TTU or TTUS. If the employee is to have access to TechBuy in the new department, then the appropriate role will have to be applied by the new Financial Manager or delegated Fund Manager.

Select the appropriate role for the person you are registering and click on **Next**.

The Financial Manager's list of Banner fund(s) will populate in the **Available FUNDs** section. Select the fund(s) that the employee should have access to spend against by highlighting the appropriate fund(s) and selecting the arrow to move the fund(s) to the **Selected FUNDs** section. If a fund is not granted to the employee, that employee will not be able to select that fund when submitting a requisition.
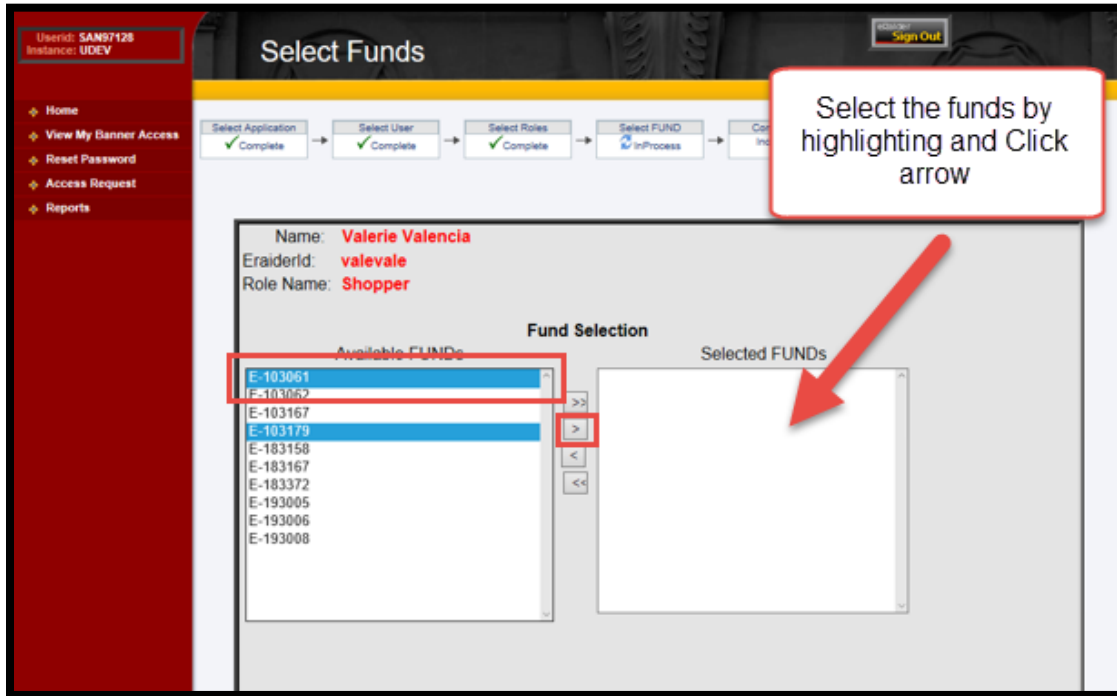
Verify that all appropriate funds are listed in the **Selected FUNDs** section and click on **Submit**.
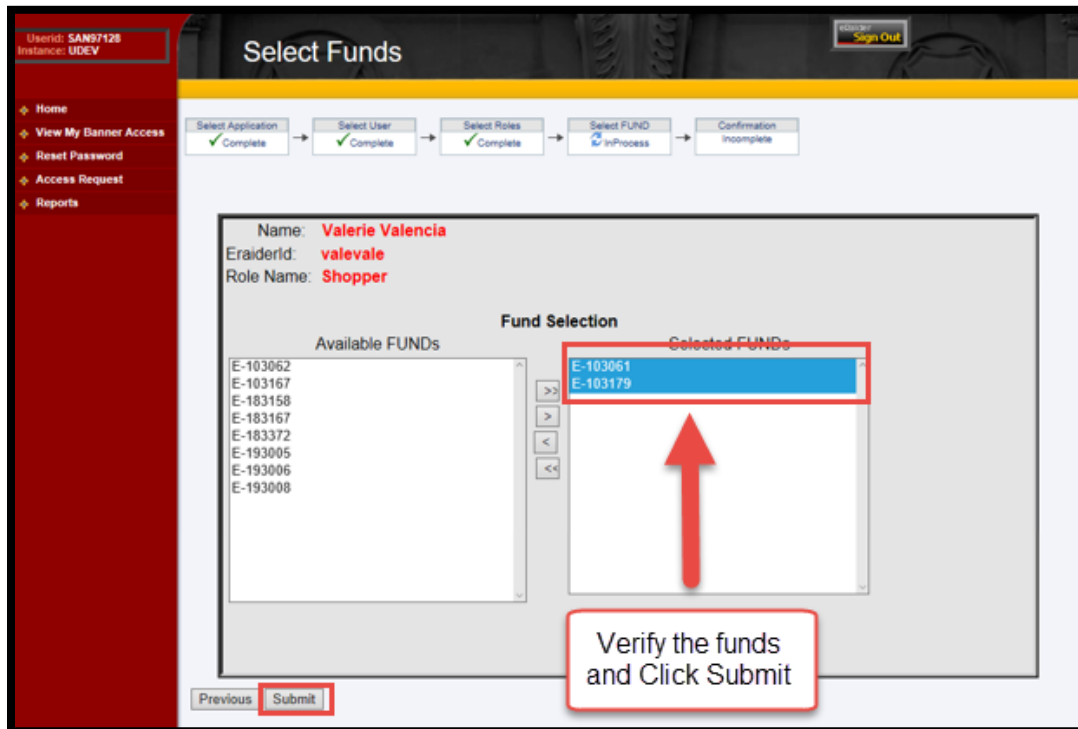
Once you submit the request, you will receive a **Confirmation** screen. It will provide a one-page summary of the access request that displays the name of the person, the **Profile Selected** (the role assigned as a TechBuy user) and the **FUNDs Added** (the fund(s) the employee should have access to spend against).
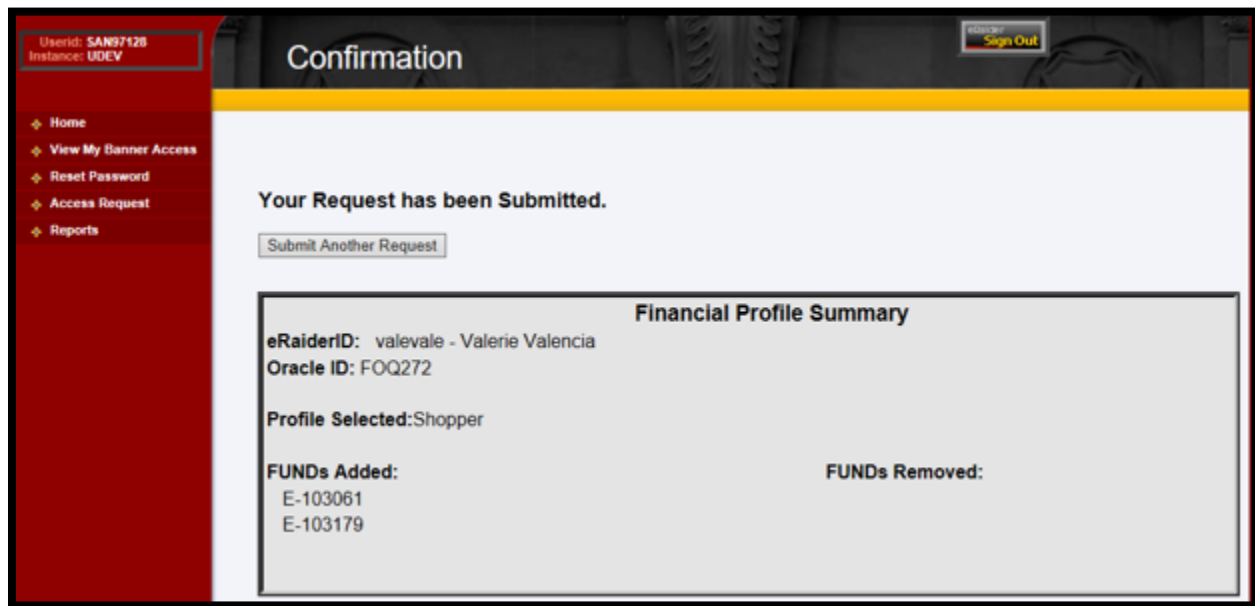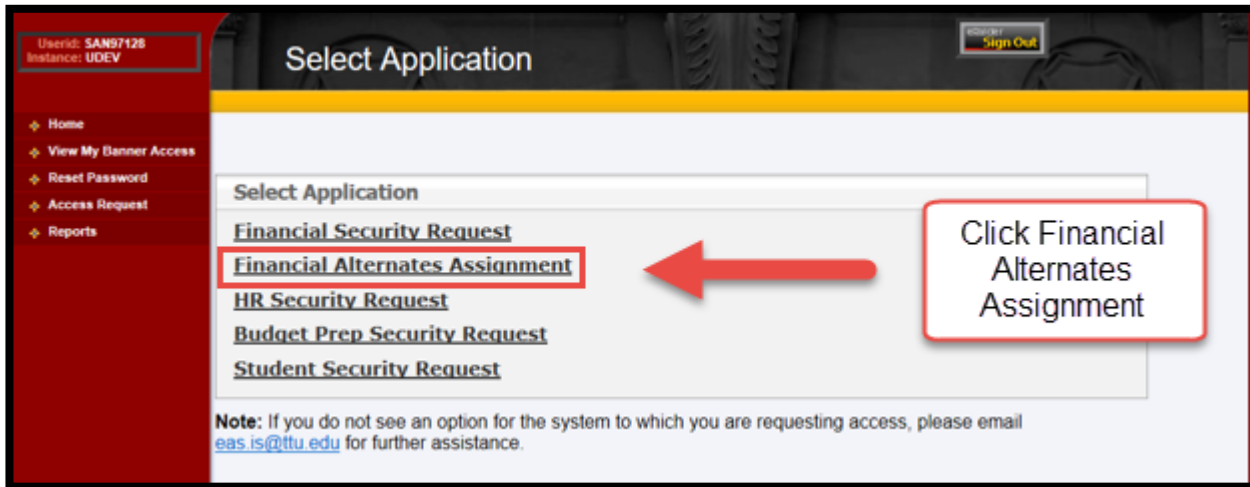

An automatic email verification will be sent to the person who set up the access and the employee that was set up.
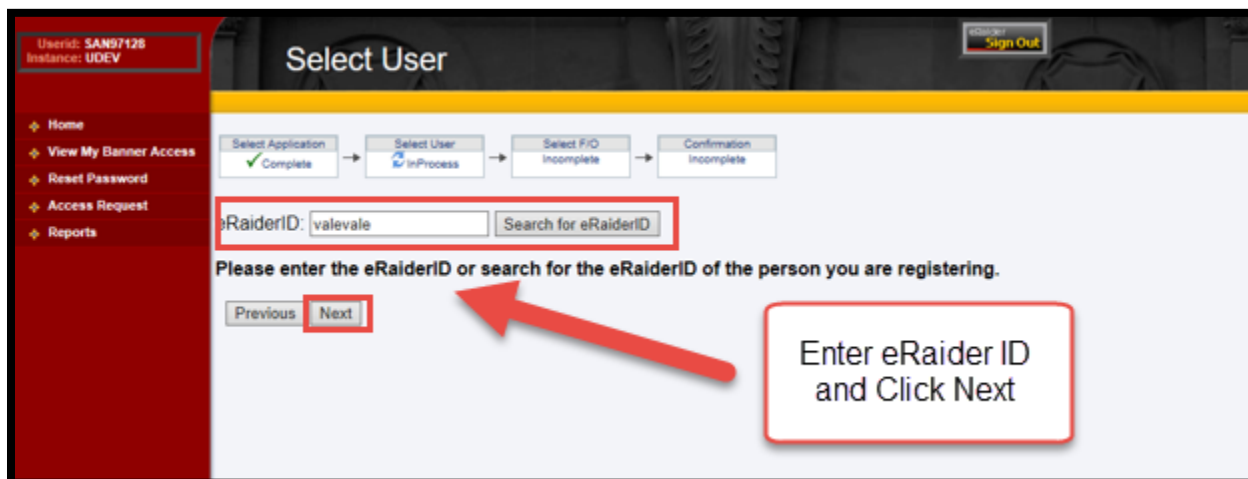
**Financial Alternates Assignment**

To register a Financial Alternate to serve as a back-up for the Orgn Manager for a New Fund Request Approval, click on the **Financial Alternates Assignment** link from the **Select Application** page.


If known, enter the eRaider ID of the employee you wish to register and click on **Next**. If you do not know the eRaider ID, click on the **Search for eRaider ID** button.

The Financial Manager's list of Orgn code(s) will populate in the **Select F/O Code** section. Select the Orgn code(s) that the employee should be assigned as the Financial Alternate by highlighting the appropriate Orgn code(s) and selecting the arrow to move the Orgn code(s) to the **F/O Selected** section.
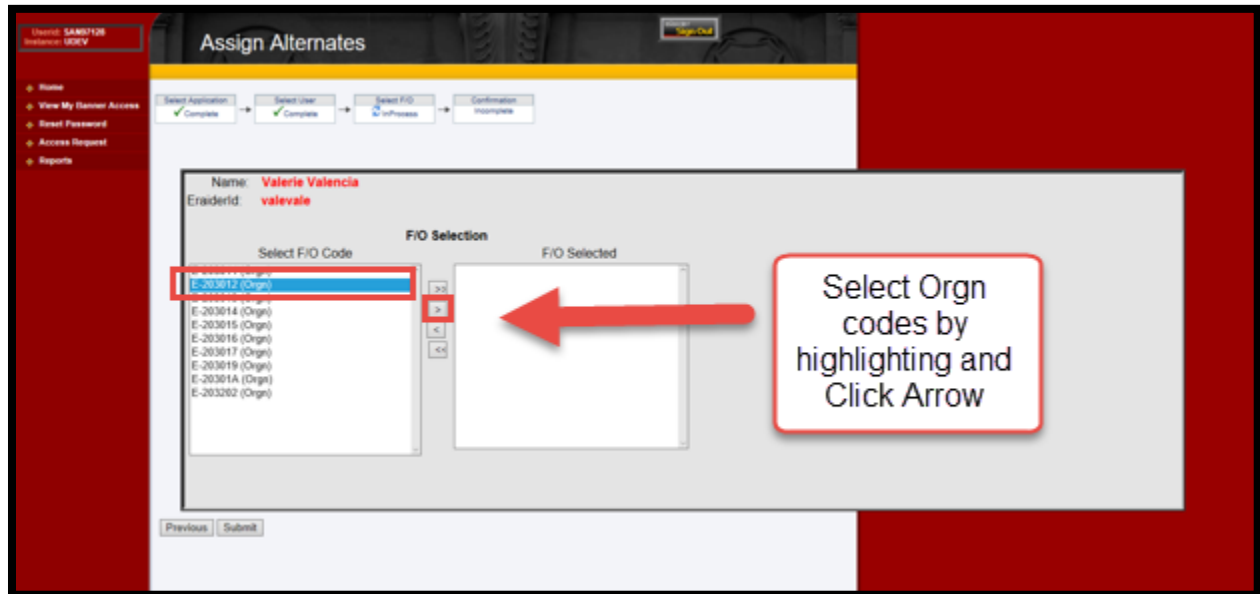

Verify that all appropriate Orgn code(s) are listed in the **F/O Selected** section and click on **Submit**.
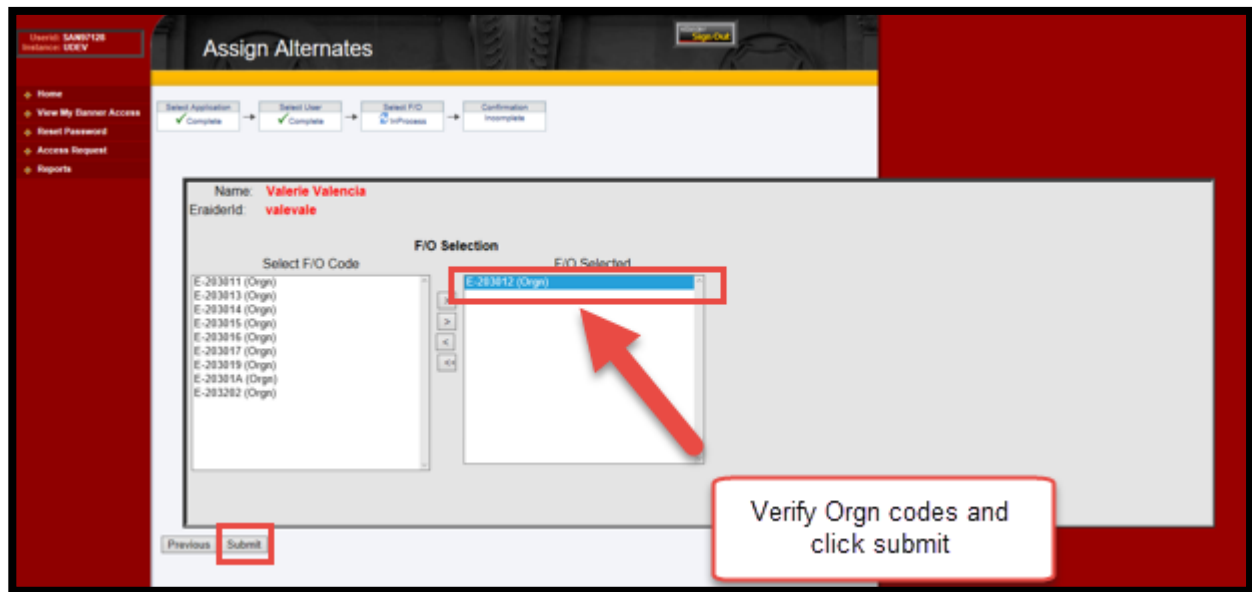
Once you submit the request, you will receive a **Confirmation** screen. It will provide a one-page summary that displays the name of the person granted the alternate approver role and the associated Banner Orgn code(s).
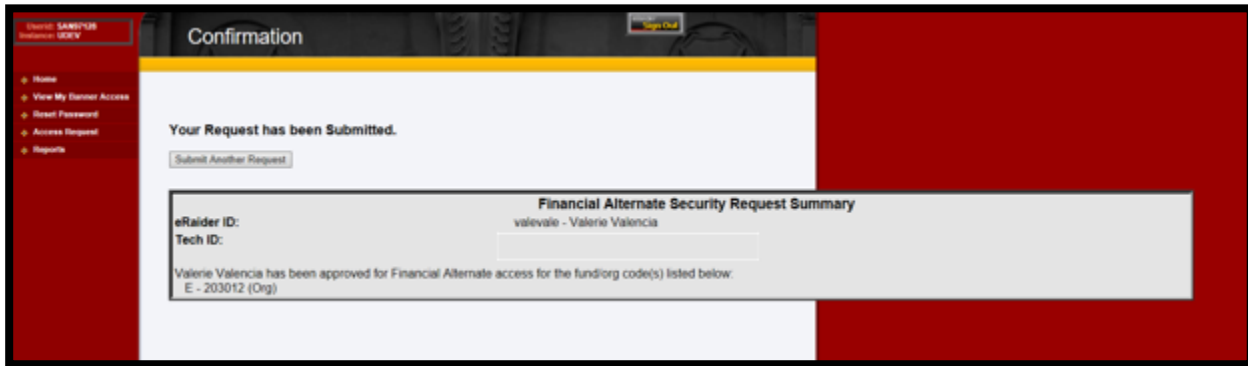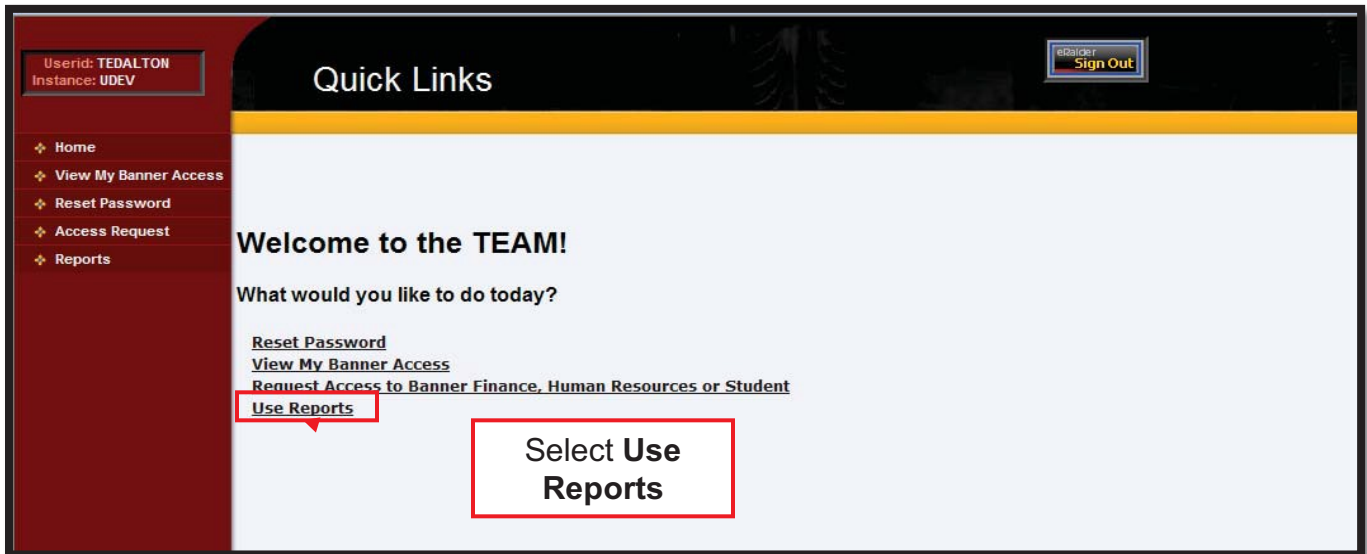

An automatic email verification will be sent to the person who set up the access and the employee that was set up.
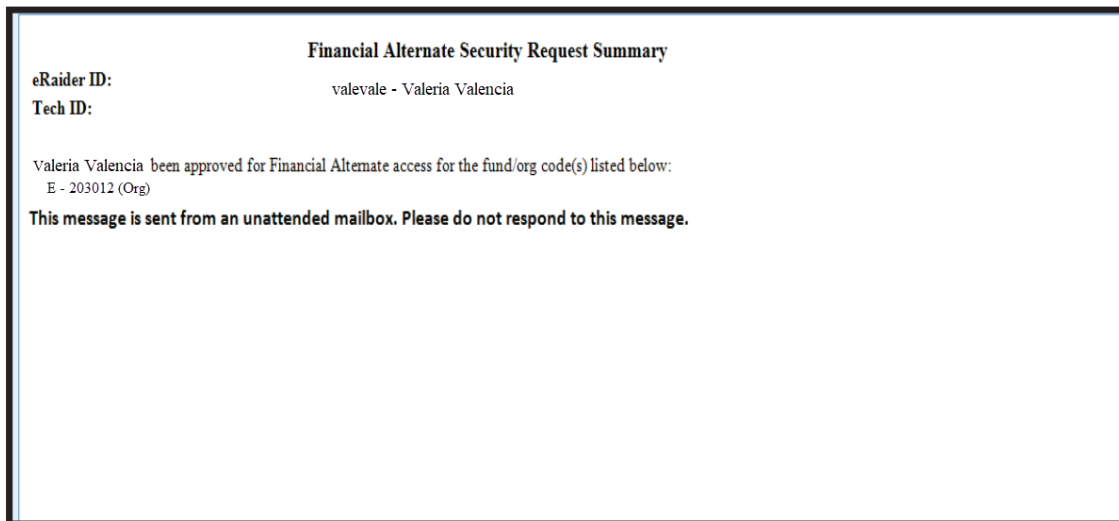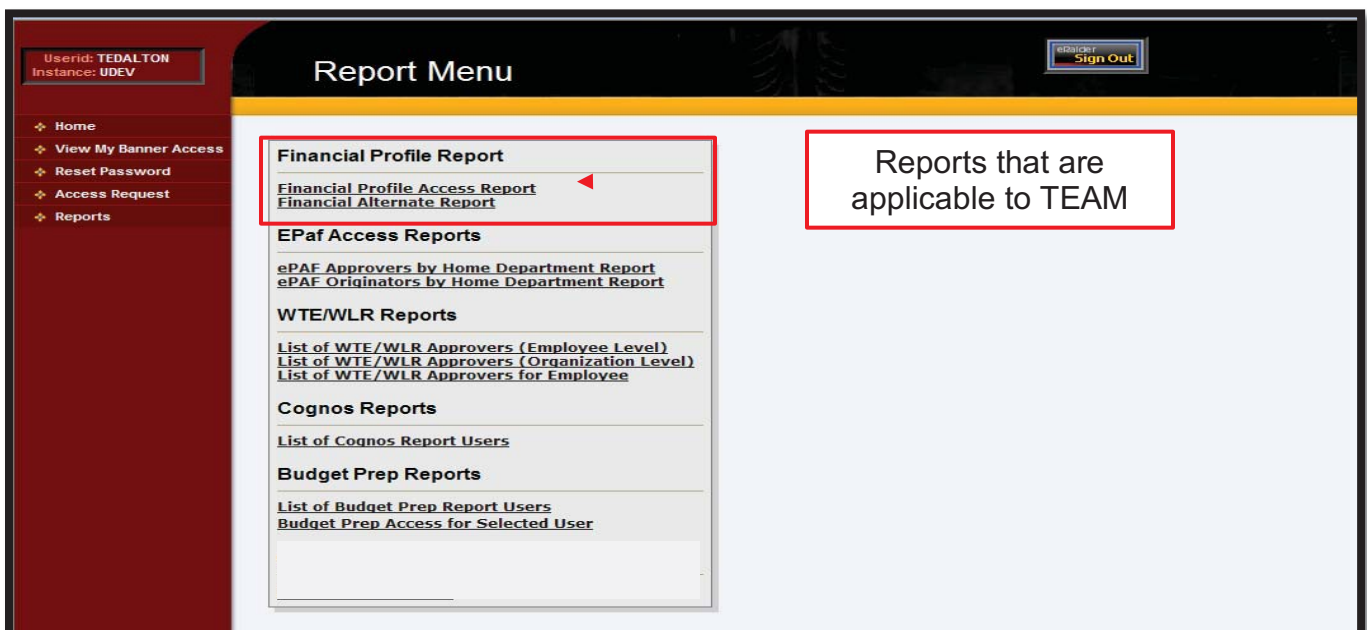
Reports

To access the reports that are available in the **TEAM Application**, select the **Reports** link in the menu bar on the left side of the page, or from the **Home** page, select **Use Reports** from the **Quick Links** section.
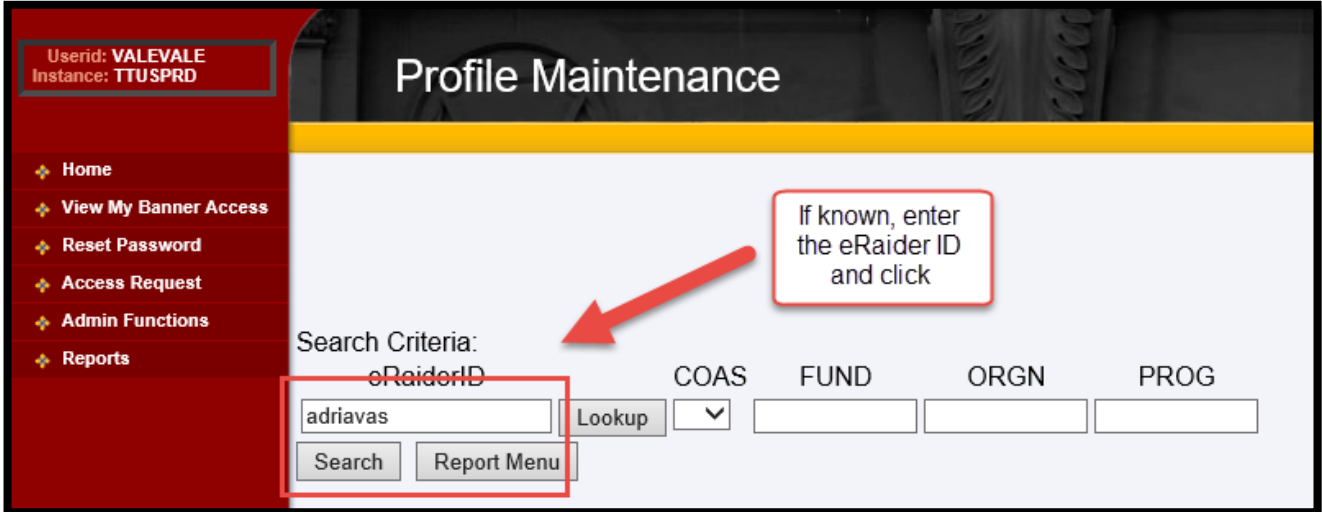
The **Financial Profile Report** section of the **Report Menu** contains links to the two reports that are applicable to the TEAM financial registration process:

- **Financial Profile Access Report**
- **Financial Alternate Report**

TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER
EL PASO

Financial Profile Access Report

If known, enter the eRaider ID of the employee you wish to query and click on **Search**. If you do not know the eRaider ID, click on the **Lookup** button to access the **eRaider Lookup** function.
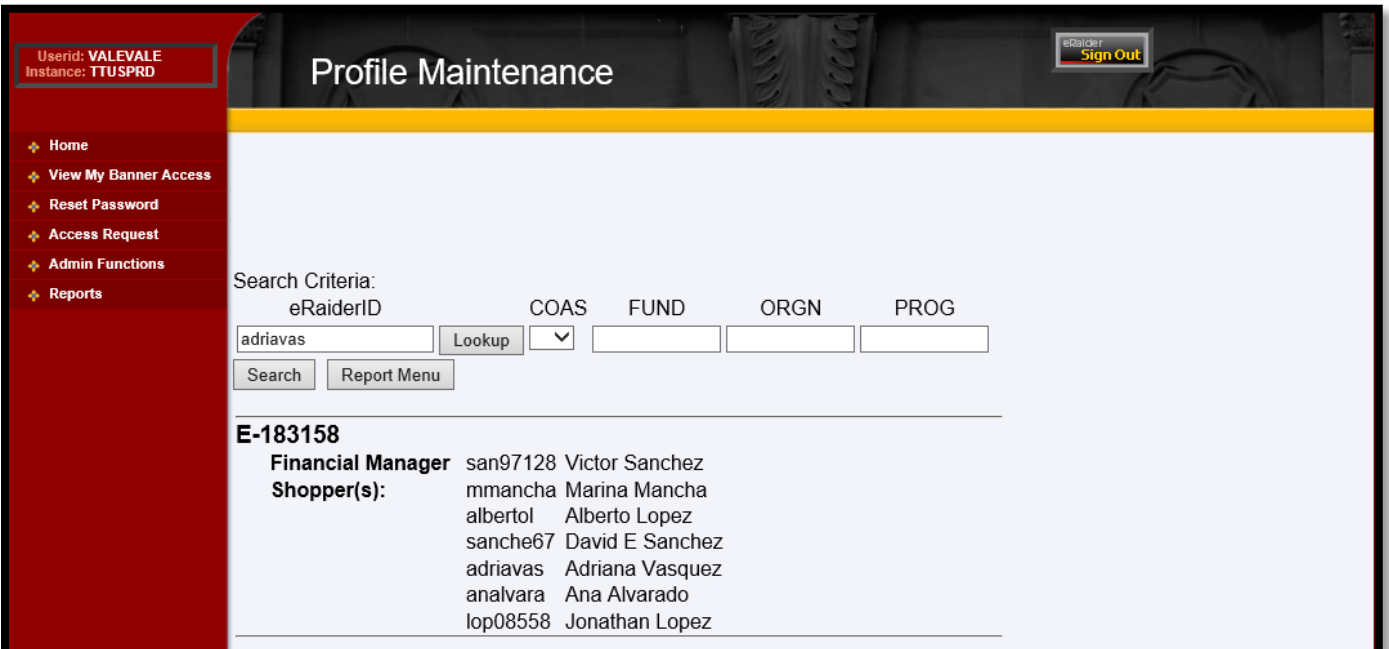
The result of the search displays the Fund, the Financial Manager for the Fund, and the security role for users of TechBuy or Direct Pay applications.
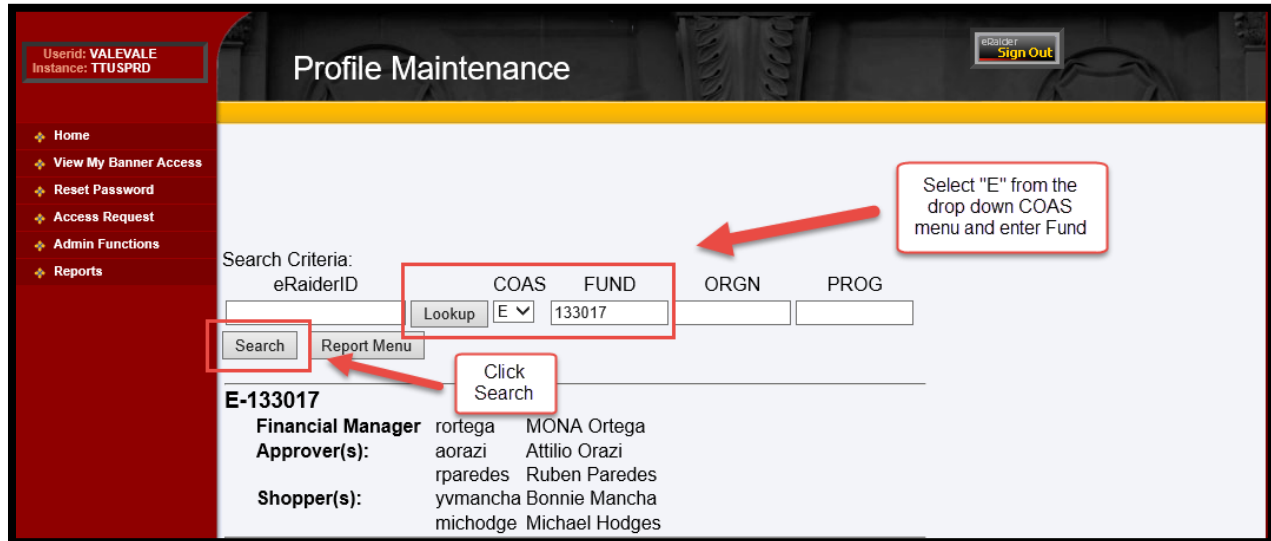
You can also search by Fund. Select the "E" (designation for HSCEP) from the drop down menu in the **COAS** (Chart of Accounts) field. Enter the Fund information in the **Fund** text box and click on **Search**. The Financial Manager and security roles for users assigned to this fund will display.
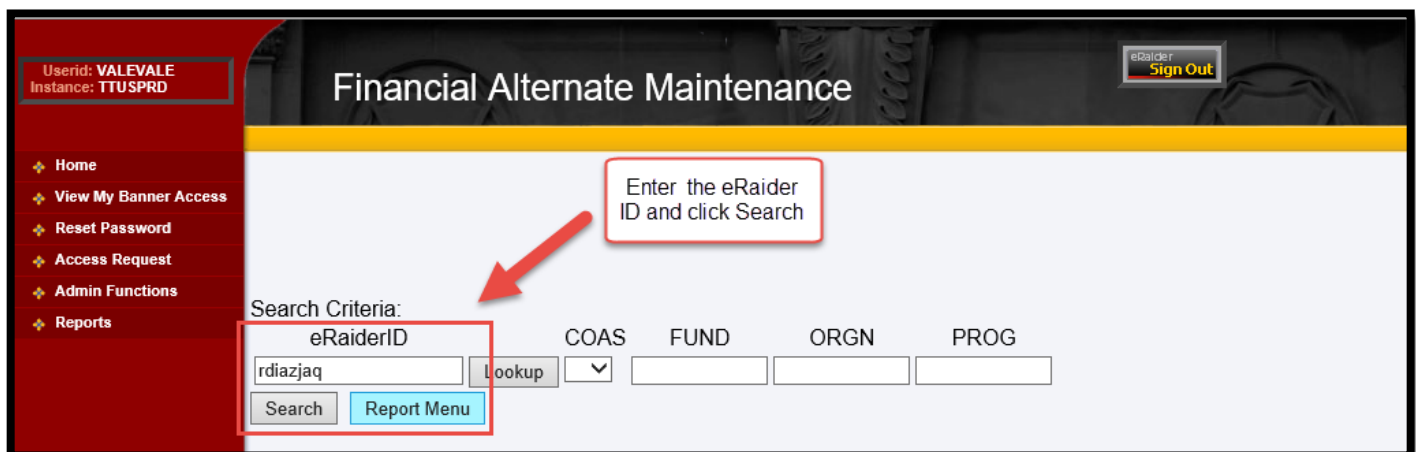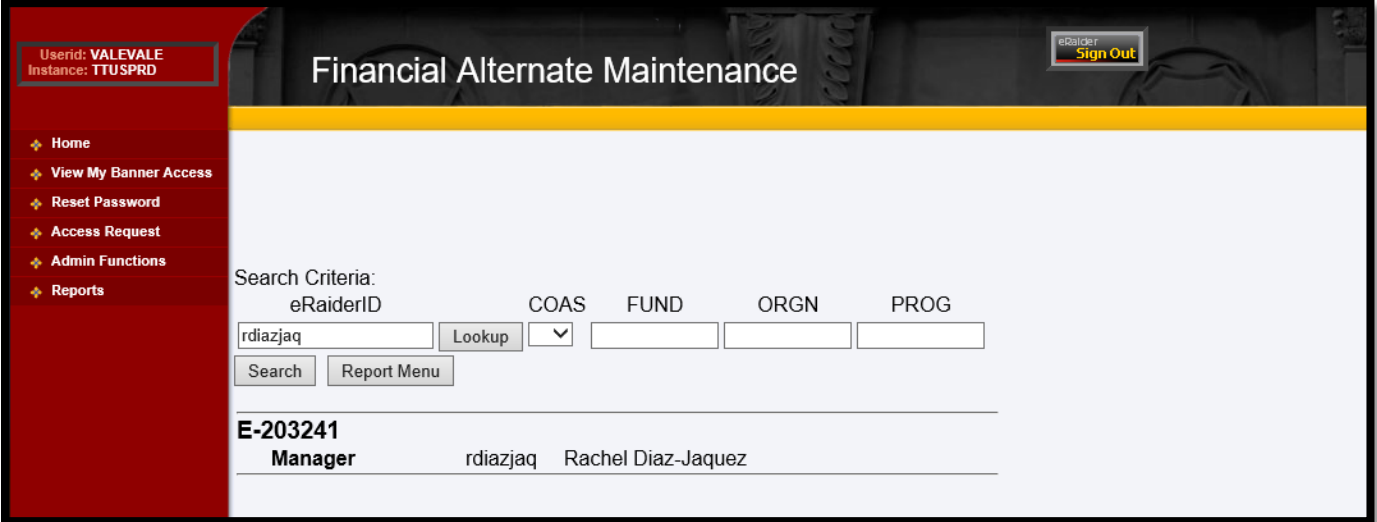

Financial Alternate Report

The Financial Alternate Report is used to query Orgn security and Orgn Manager Alternate Approver(s) for the New Fund Request Application. If known, enter the eRaider ID of the employee you wish to query and click on **Search**. If you do not know the eRaider ID, click on the **Lookup** button to access the **eRaider Lookup** function.

The result of the search displays the Orgn Manager and the Financial Alternate(s) for the Orgn.
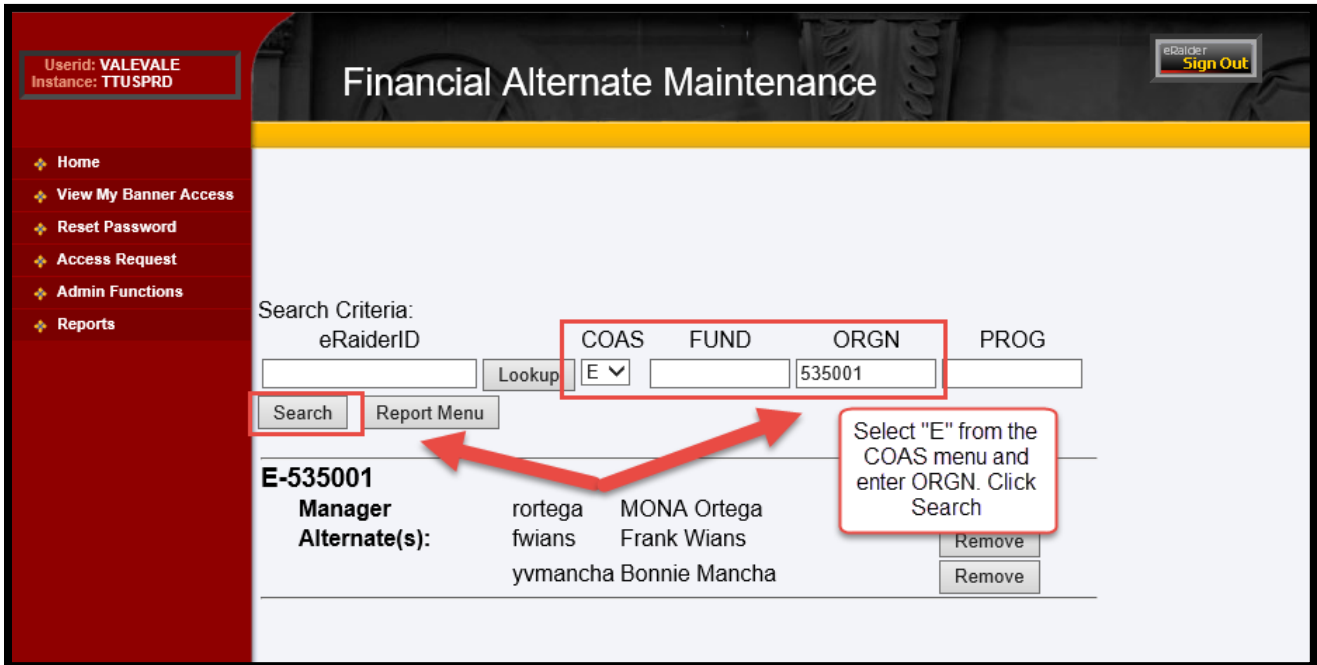
You can also search by Orgn. Select the "E" from the drop down menu in the **COAS** (Chart of Accounts) field. Enter the Orgn information in the **ORGN** text box and click on **Search**. The Financial Manager and Alternate(s) for this Orgn will display.

If you have additional questions, please contact Finance Systems Management at FSMElp@ttuhsc.edu.