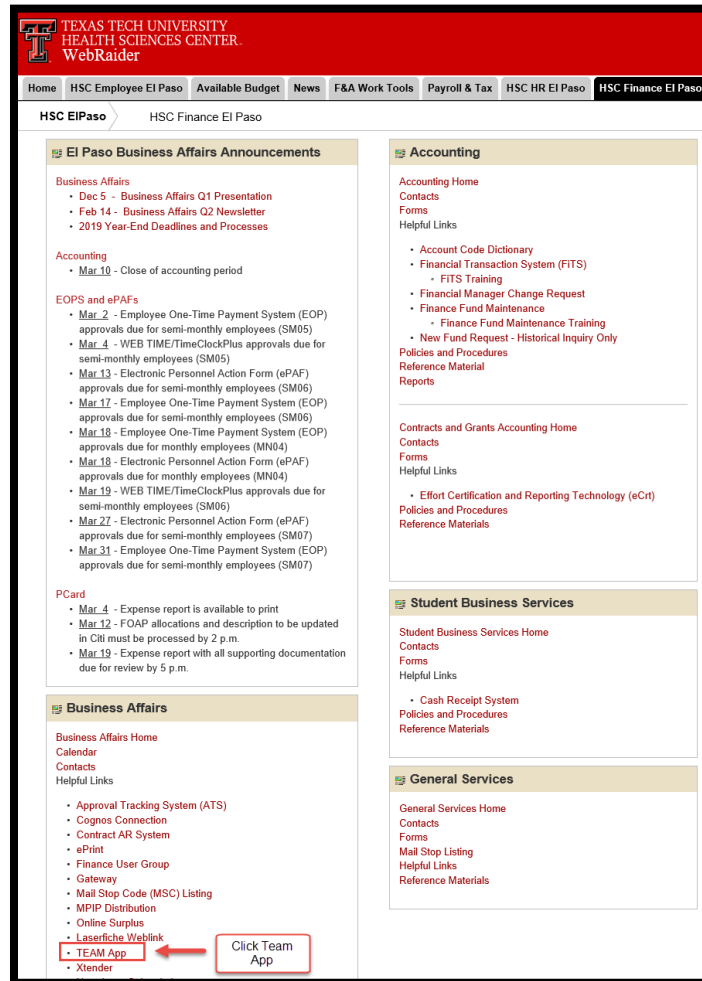


TEAM Application – Security and Finance Registration

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**.

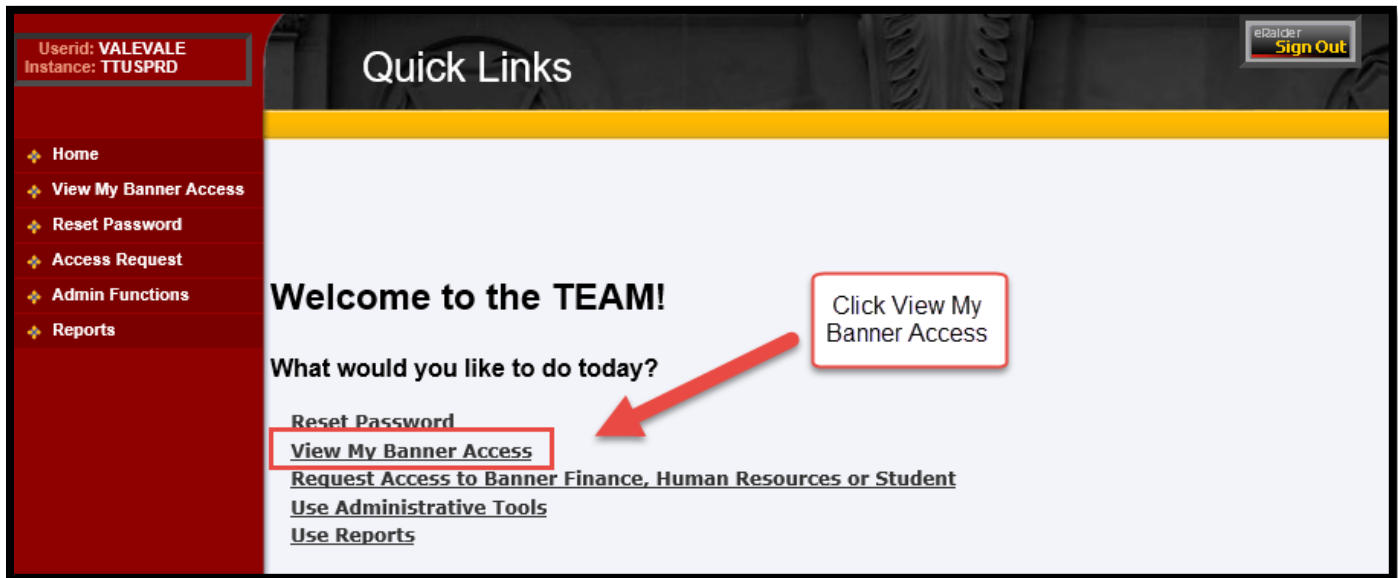


The screenshot shows the WebRaider portal interface. At the top, there is a navigation bar with links: Home, HSC Employee El Paso, Available Budget, News, F&A Work Tools, Payroll & Tax, HSC HR El Paso, and HSC Finance El Paso. Below this, the 'HSC Finance El Paso' section is active, showing a dropdown menu with 'HSC EIPaso' selected. The main content area is divided into several columns of links and announcements:

- EI Paso Business Affairs Announcements:**
 - Business Affairs: Dec 5 - Business Affairs Q1 Presentation, Feb 14 - Business Affairs Q2 Newsletter, 2019 Year-End Deadlines and Processes
 - Accounting: Mar 10 - Close of accounting period
 - EOPS and ePAFs: Mar 2 - EOP approvals due for semi-monthly employees (SM05), Mar 4 - WEB TIME/TimeClockPlus approvals due for semi-monthly employees (SM05), Mar 13 - ePAF approvals due for semi-monthly employees (SM06), Mar 17 - EOP approvals due for semi-monthly employees (SM06), Mar 18 - EOP approvals due for monthly employees (MN04), Mar 18 - ePAF approvals due for monthly employees (MN04), Mar 19 - WEB TIME/TimeClockPlus approvals due for semi-monthly employees (SM06), Mar 22 - ePAF approvals due for semi-monthly employees (SM07), Mar 31 - EOP approvals due for semi-monthly employees (SM07)
 - PCard: Mar 4 - Expense report is available to print, Mar 12 - FOAP allocations and description to be updated in Citi must be processed by 2 p.m., Mar 19 - Expense report with all supporting documentation due for review by 5 p.m.
- Accounting:** Accounting Home, Contacts, Forms, Helpful Links, Account Code Dictionary, Financial Transaction System (FITS), FITS Training, Financial Manager Change Request, Finance Fund Maintenance, Finance Fund Maintenance Training, New Fund Request - Historical Inquiry Only, Policies and Procedures, Reference Material, Reports, Contracts and Grants Accounting Home, Contacts, Forms, Helpful Links, Effort Certification and Reporting Technology (eCrt), Policies and Procedures, Reference Materials
- Student Business Services:** Student Business Services Home, Contacts, Forms, Helpful Links, Cash Receipt System, Policies and Procedures, Reference Materials
- Business Affairs:** Business Affairs Home, Calendar, Contacts, Helpful Links, Approval Tracking System (ATS), Cognos Connection, Contract AR System, ePrint, Finance User Group, Gateway, Mail Stop Code (MSC) Listing, MPIP Distribution, Online Surplus, Laserfiche Weblink, **TEAM App** (highlighted with a red box and arrow), Xtender
- General Services:** General Services Home, Contacts, Forms, Mail Stop Listing, Helpful Links, Reference Materials

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.

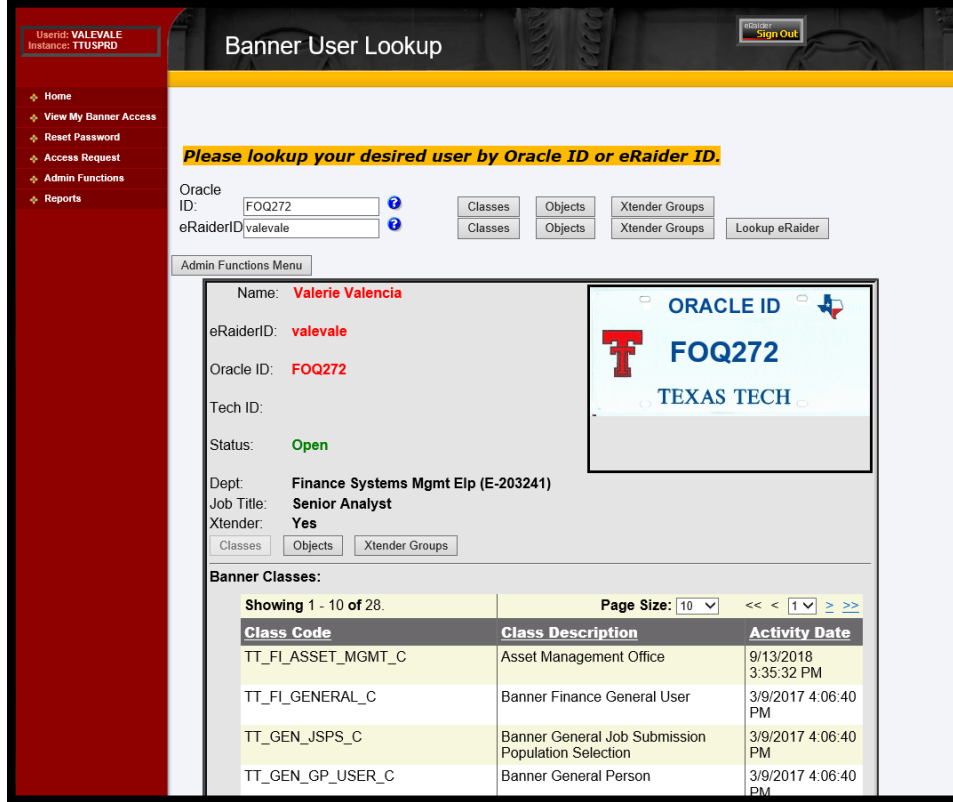


View My Banner Access

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)



The screenshot shows the Banner User Lookup interface. At the top, it displays the user's current session: Userid: VALEVALE, Instance: TTUSPRD, and a Sign Out button. A navigation menu on the left includes Home, View My Banner Access, Reset Password, Access Request, Admin Functions, and Reports. The main content area is titled "Banner User Lookup" and contains a search prompt: "Please lookup your desired user by Oracle ID or eRaider ID." Below this, there are input fields for Oracle ID (FOQ272) and eRaiderID (valevale), along with buttons for "Classes", "Objects", and "Xtender Groups". A "Lookup eRaider" button is also present. An "Admin Functions Menu" button is located below the search fields. The user details for Valerie Valencia are displayed, including her Name, eRaiderID (valevale), Oracle ID (FOQ272), Tech ID, Status (Open), Department (Finance Systems Mgmt Elp (E-203241)), Job Title (Senior Analyst), and Xtender status (Yes). A "Banner Classes" table is shown below, listing various class codes and their descriptions. A small ORACLE ID badge for FOQ272 is also visible.

Name: Valerie Valencia

eRaiderID: valevale

Oracle ID: FOQ272

Tech ID:

Status: Open

Dept: Finance Systems Mgmt Elp (E-203241)

Job Title: Senior Analyst

Xtender: Yes

Banner Classes:

Class Code	Class Description	Activity Date
TT_FL_ASSET_MGMT_C	Asset Management Office	9/13/2018 3:35:32 PM
TT_FL_GENERAL_C	Banner Finance General User	3/9/2017 4:06:40 PM
TT_GEN_JSPS_C	Banner General Job Submission Population Selection	3/9/2017 4:06:40 PM
TT_GEN_GP_USER_C	Banner General Person	3/9/2017 4:06:40 PM

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**.

Userid: VALEVALE
 Instance: TTUSPRD

Reset Password

Oracle ID: **FOQ272**

● Password:
?
set password

Disclaimer (PLEASE READ):

Access to Banner data is granted solely for legitimate and authorized academic and administrative purposes. Use of the data may be restricted under Federal and State laws and regulations. Any unauthorized or illegitimate use may result in disciplinary action, criminal prosecution and/or civil litigation. By using Banner applications, you are indicating that you have received, understood, and agreed to the policies relating to Banner security and data privacy.

Enter new password and click 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.

Password Changed

Oracle ID: **FOQ272**

● Password:
?
set password

Instance	Status
PDEV	Password Changed
UDEV	Password Changed
TTUSPRD	Password Changed

Password is only changed in TTUSPRD

Disclaimer (PLEASE READ):

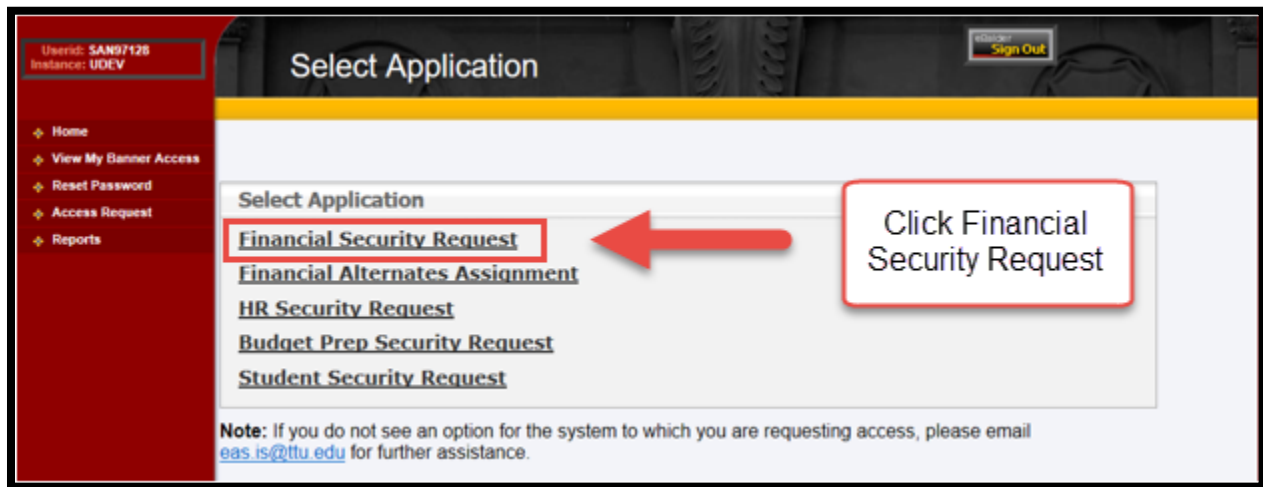
Access to Banner data is granted solely for legitimate and authorized academic and administrative purposes. Use of the data may be restricted under Federal and State laws and regulations. Any unauthorized or illegitimate use may result in disciplinary action, criminal prosecution and/or civil litigation. By using Banner applications, you are indicating that you have received, understood, and agreed to the policies relating to Banner security and data privacy.

TechBuy User Access

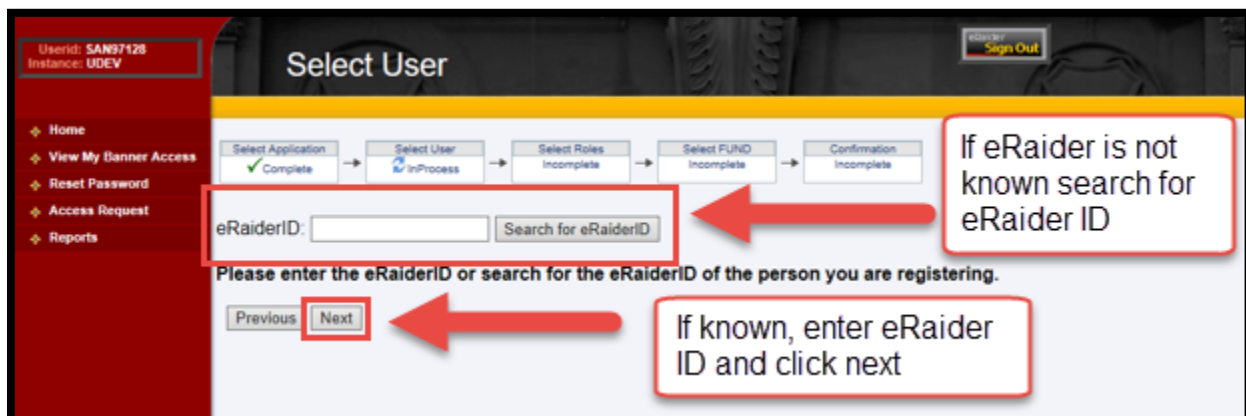
To request TechBuy user access, click on **Access Request** from the menu bar on the left side of the page. You can also use the **Request Access to Banner Finance, Human Resources or Student** link from the **Home** page **Quick Links**.

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.

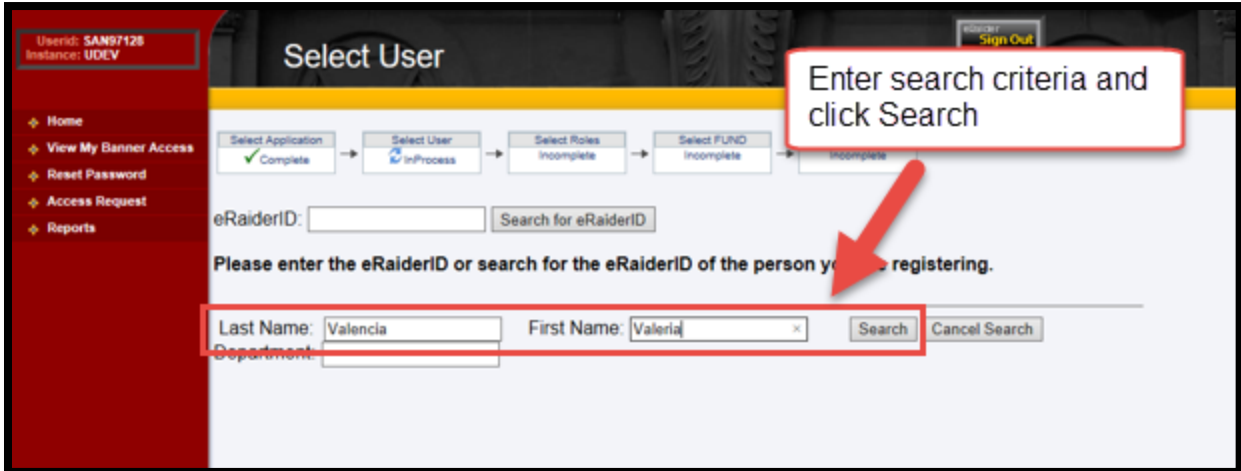
From the **Select Application** page, click on **Financial Security Request**.



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**.



Userid: SAN97128
 Instance: UDEV

Home
 View My Banner Access
 Reset Password
 Access Request
 Reports

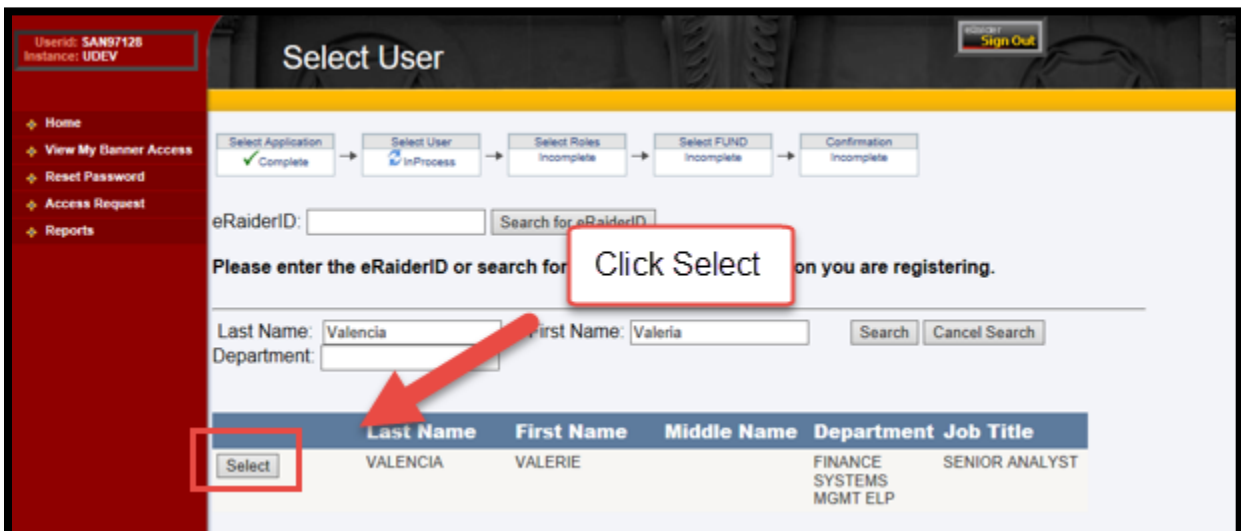
Select Application Complete → Select User InProcess → Select Roles Incomplete → Select FUND Incomplete → Confirmation Incomplete

eRaiderID: Search for eRaiderID

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

Last Name: First Name: Department:

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.**



Userid: SAN97128
 Instance: UDEV

Home
 View My Banner Access
 Reset Password
 Access Request
 Reports

Select Application Complete → Select User InProcess → Select Roles Incomplete → Select FUND Incomplete → Confirmation Incomplete

eRaiderID: Search for eRaiderID

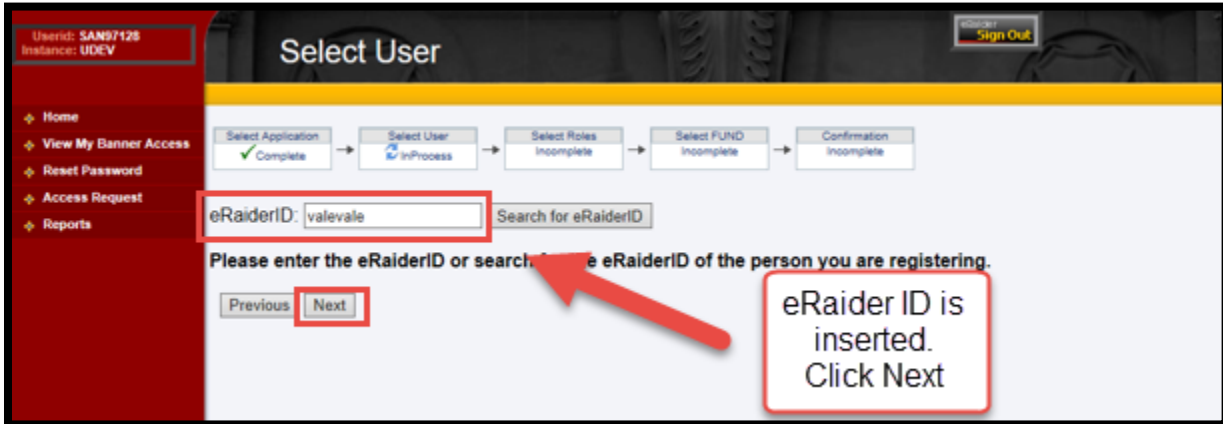
Please enter the eRaiderID or search for the eRaiderID of the person you are registering.

Last Name: First Name: Department:

Last Name	First Name	Middle Name	Department	Job Title
VALENCIA	VALERIE		FINANCE SYSTEMS MGMT ELP	SENIOR ANALYST

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:

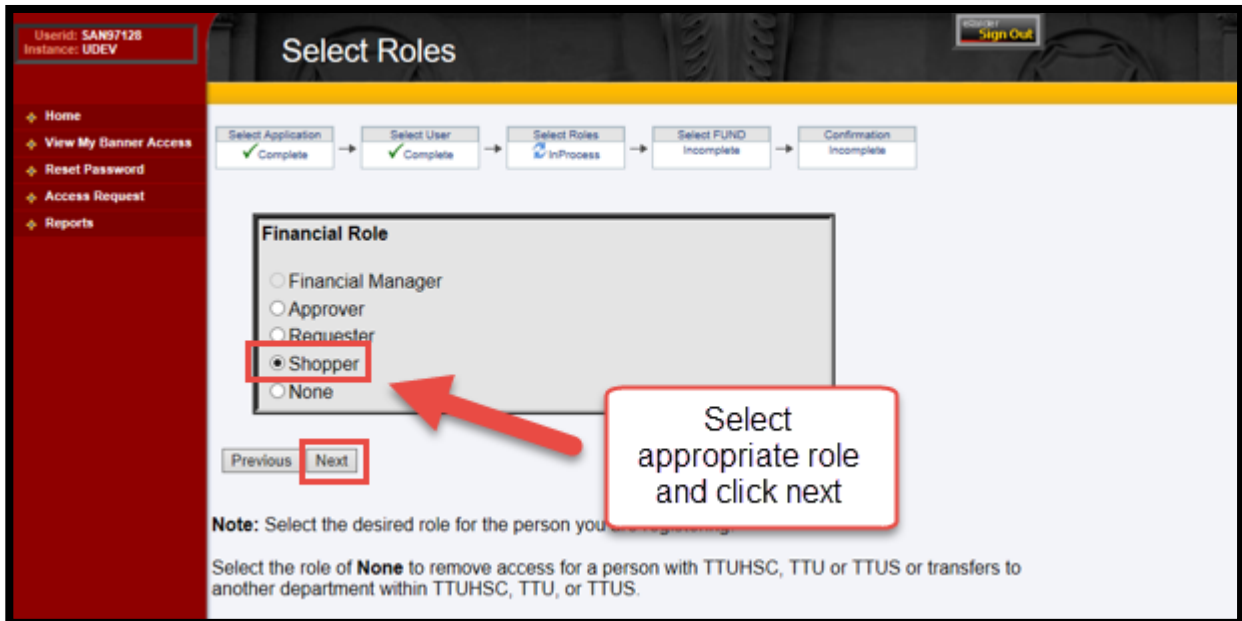
- All non-catalog orders submitted by Requesters and Shoppers charged to Banner Funds to which the Approver has been granted authority to approve
- All catalog orders from Shoppers
- Catalog orders of \$5,000.00 and above from Requesters.

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**.



userid: SAN97128
Instance: UDEV

Select Roles

Sign Out

Select Application Complete → Select User Complete → Select Roles InProcess → Select FUND Incomplete → Confirmation Incomplete

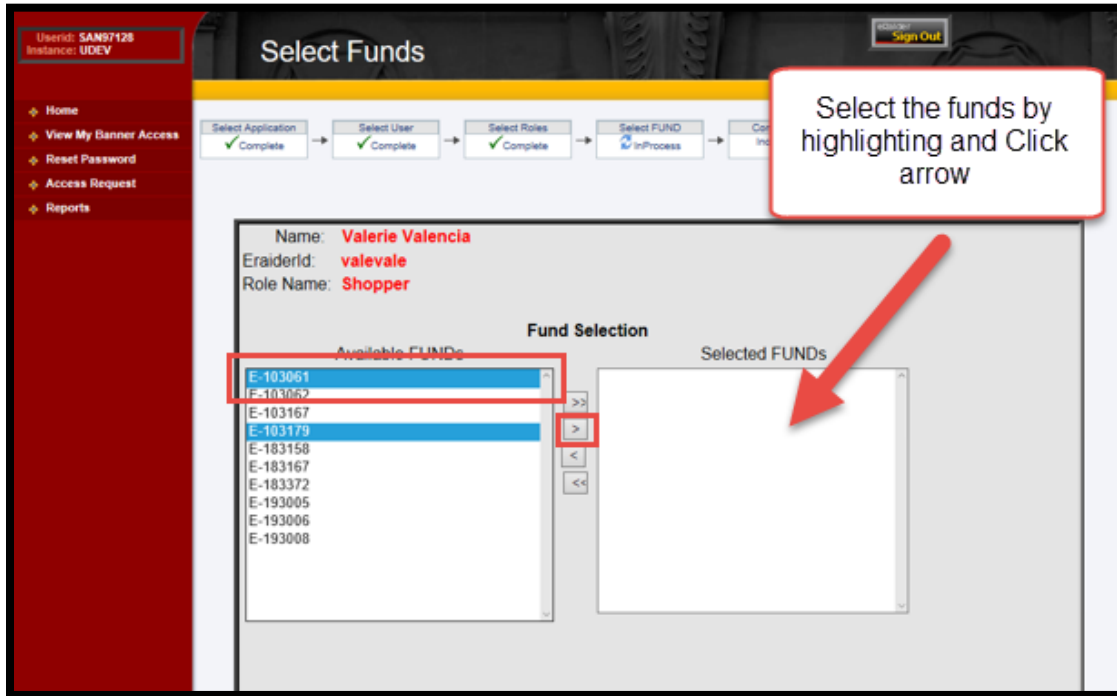
Financial Role

- Financial Manager
- Approver
- Requester
- Shopper**
- None

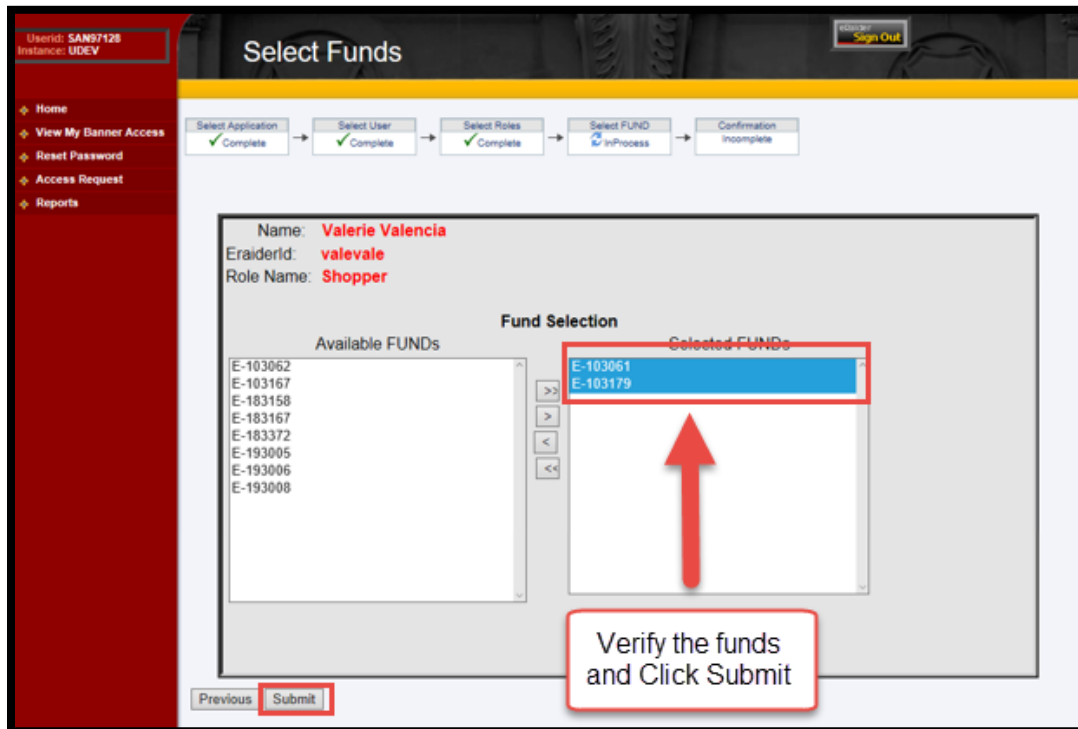
Previous **Next**

Note: Select the desired role for the person you are registering.
Select the role of **None** to remove access for a person with TTUHSC, TTU or TTUS or transfers to another department within TTUHSC, TTU, or TTUS.

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.

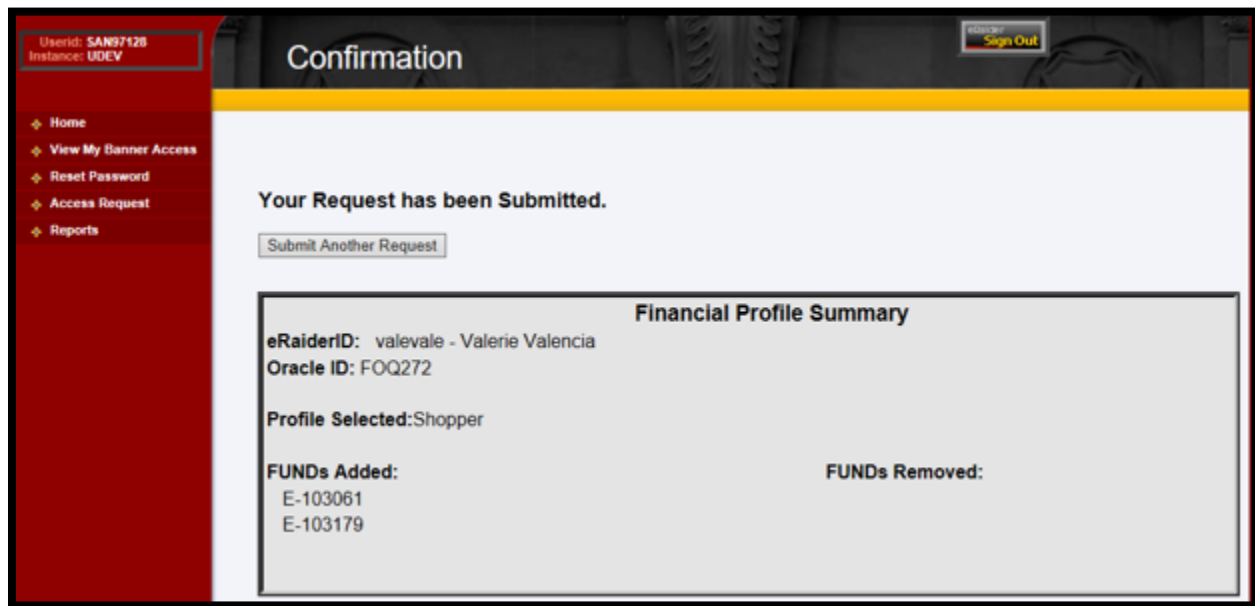


Verify that all appropriate funds are listed in the **Selected FUNDS** section and click on **Submit**.





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).

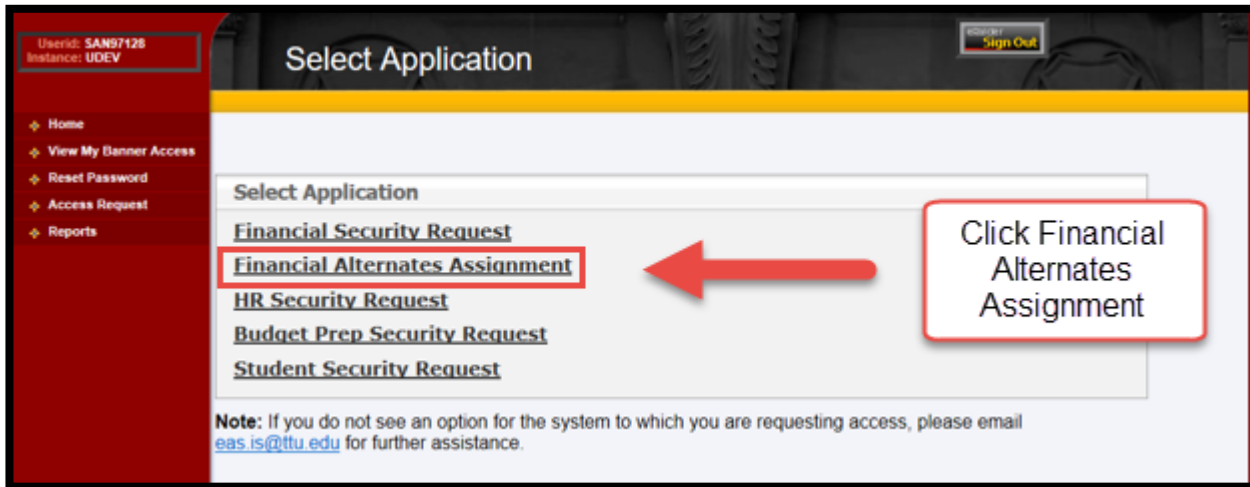


An automatic email verification will be sent to the person who set up the access and the employee that was set up.

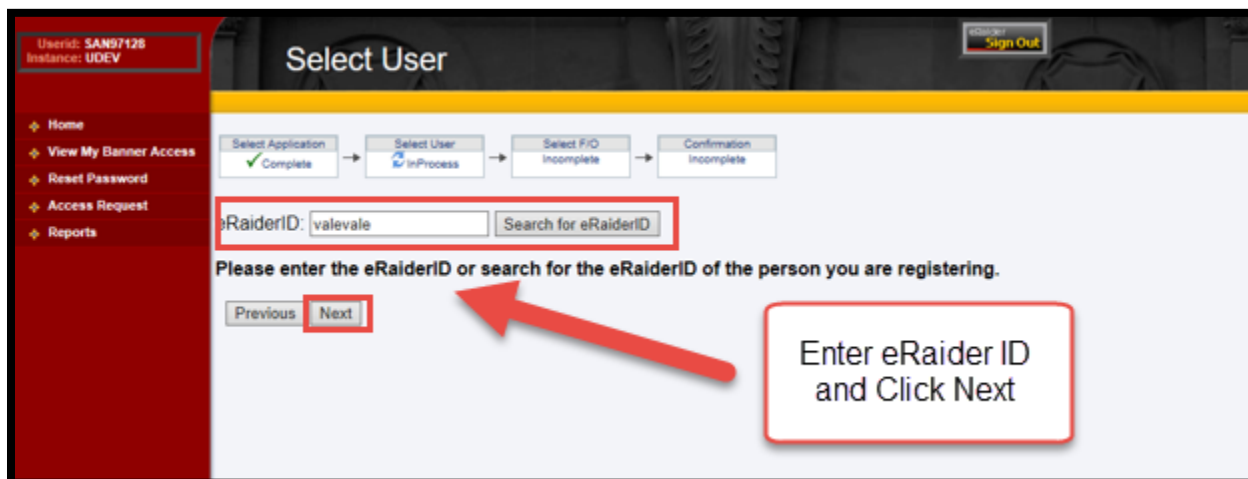


Financial Alternates Assignment

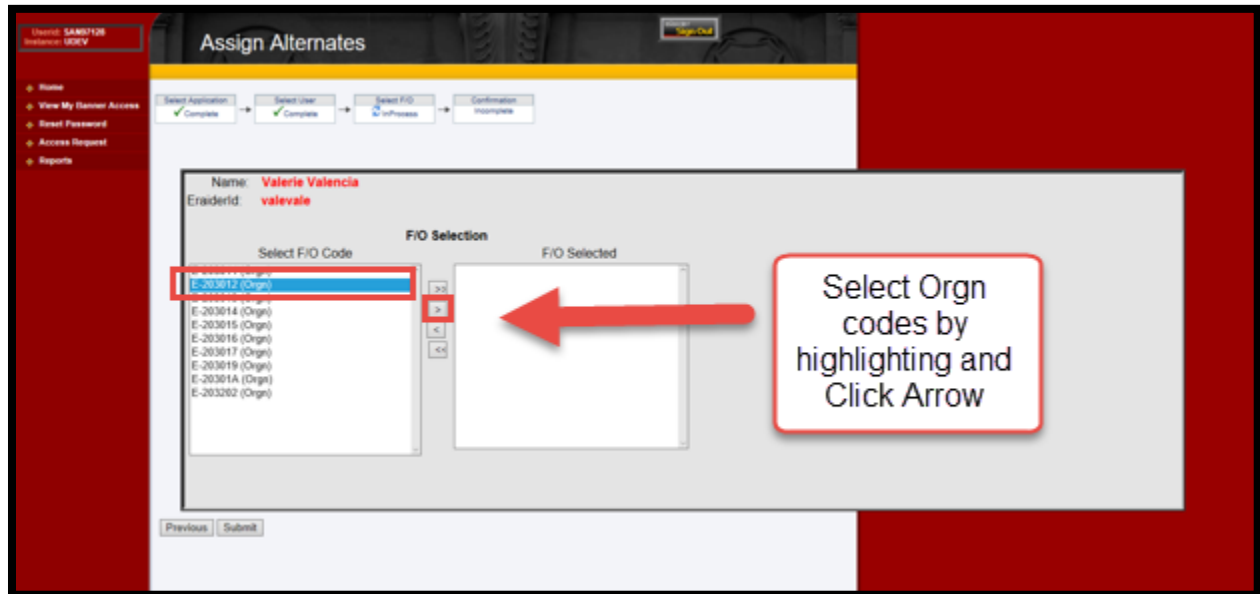
To register a Financial Alternate to serve as a back-up for the Orgn Manager for a New Fund Request Approval, click on the **Financial Alternates Assignment** link from the **Select Application** page.



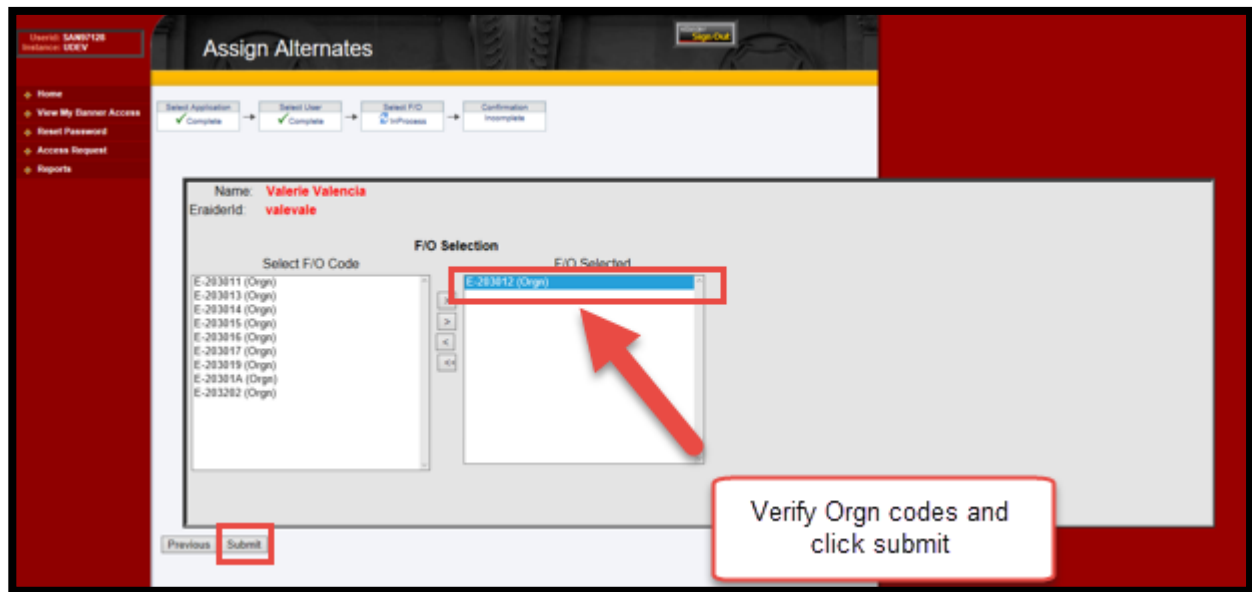
If known, enter the eRaider ID of the employee you wish to register and click on **Next**. If you do not know the eRaider ID, click on the **Search for eRaider ID** button.



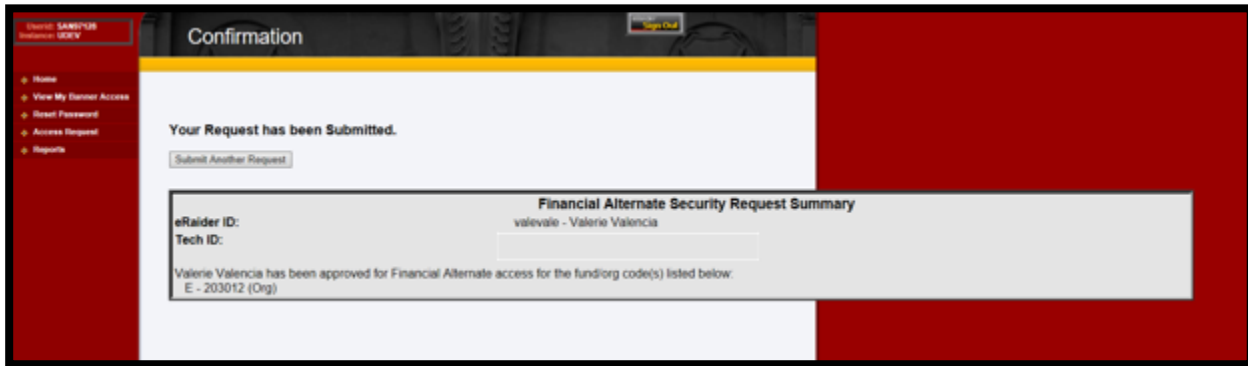
The Financial Manager's list of Orgn code(s) will populate in the **Select F/O Code** section. Select the Orgn code(s) that the employee should be assigned as the Financial Alternate by highlighting the appropriate Orgn code(s) and selecting the arrow to move the Orgn code(s) to the **F/O Selected**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



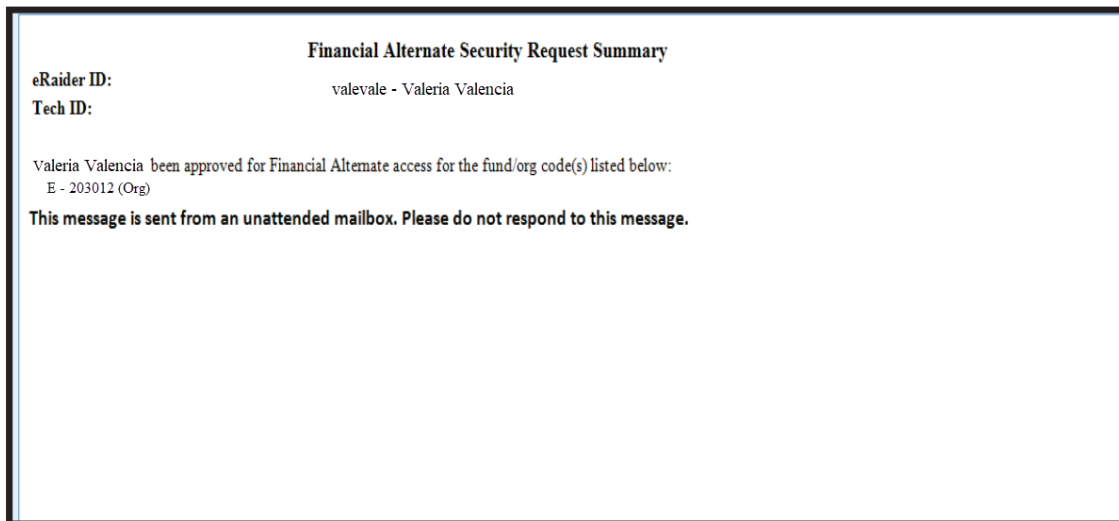
Verify that all appropriate Orgn code(s) are listed in the **F/O Selected** section and click on **Submit**.



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).

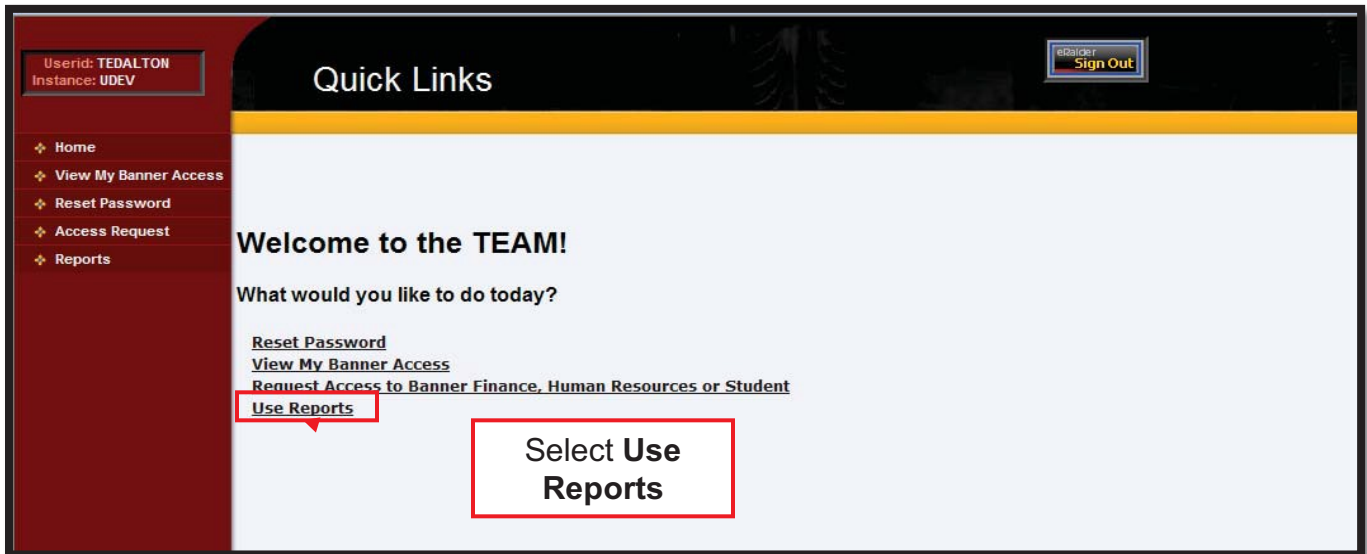


An automatic email verification will be sent to the person who set up the access and the employee that was set up.



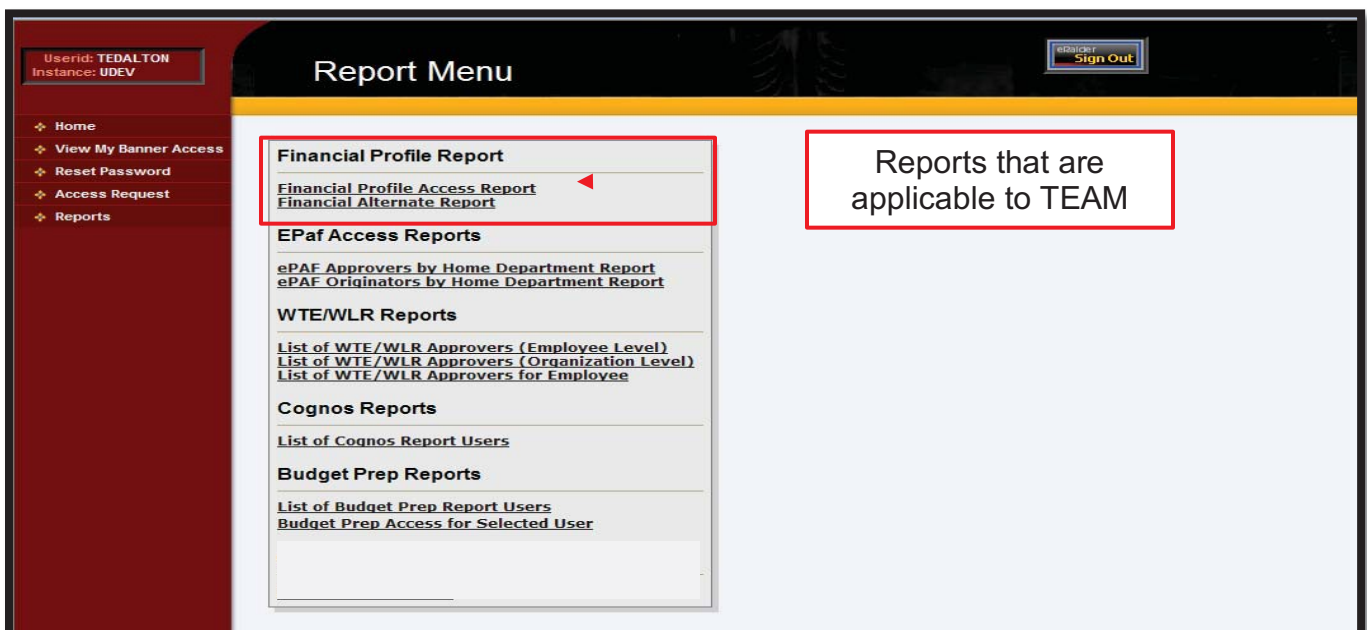
Reports

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.



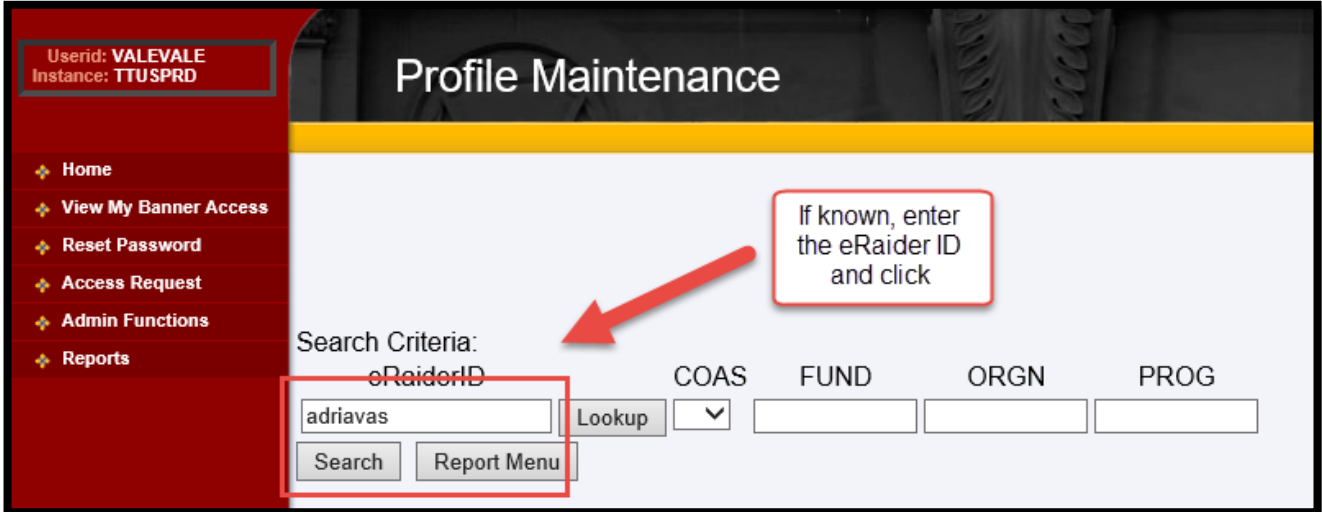
The **Financial Profile Report** section of the **Report Menu** contains links to the two reports that are applicable to the TEAM financial registration process:

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



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.



Userid: VALEVALE
 Instance: TTUSPRD

Profile Maintenance

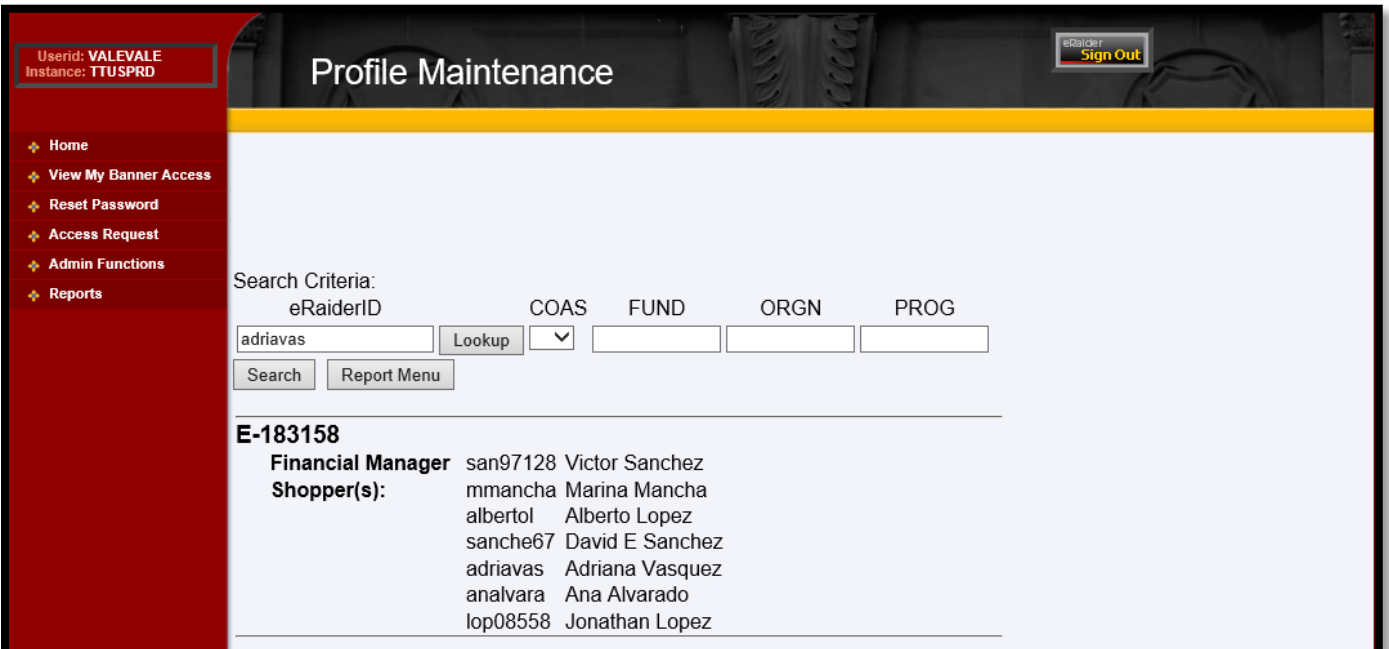
- Home
- View My Banner Access
- Reset Password
- Access Request
- Admin Functions
- Reports

Search Criteria:

eRaiderID:
 COAS:
 FUND:
 ORGN:
 PROG:

If known, enter the eRaider ID and click

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.



Userid: VALEVALE
 Instance: TTUSPRD

Profile Maintenance

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

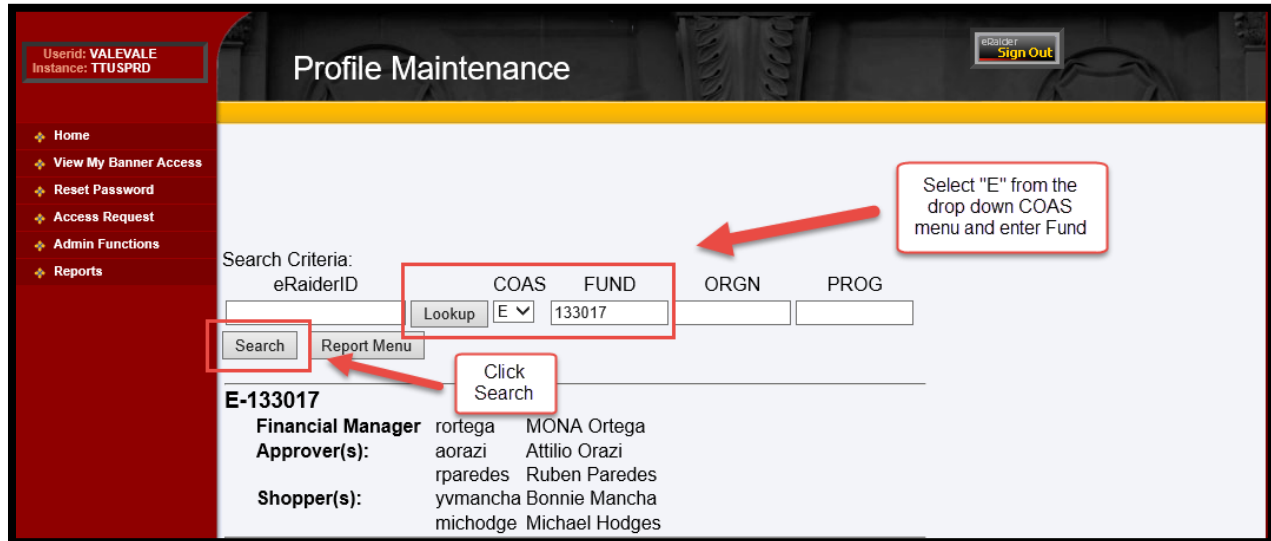
Search Criteria:

eRaiderID:
 COAS:
 FUND:
 ORGN:
 PROG:

E-183158

Financial Manager san97128 Victor Sanchez
Shopper(s): mmancha Marina Mancha
 albertol Alberto Lopez
 sanche67 David E Sanchez
 adriavas Adriana Vasquez
 analvara Ana Alvarado
 lop08558 Jonathan Lopez

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.

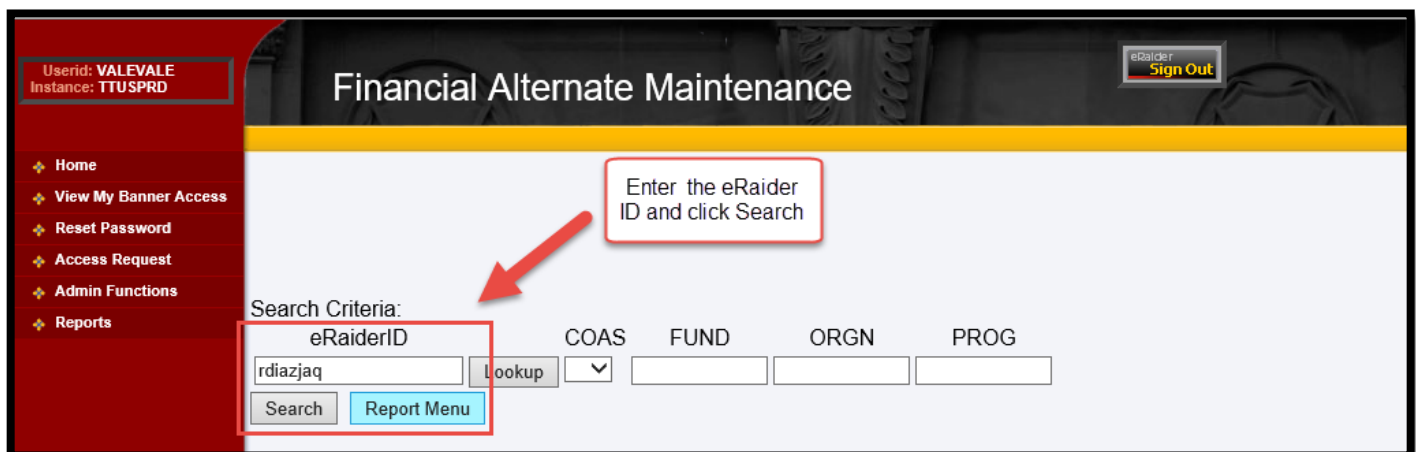


The screenshot shows the 'Profile Maintenance' page. On the left is a navigation menu with options: Home, View My Banner Access, Reset Password, Access Request, Admin Functions, and Reports. The main content area has a search form with the following fields: eRaiderID, COAS (with a dropdown menu), FUND (with a text box containing '133017'), ORGN, and PROG. A 'Lookup' button is next to the COAS field. Below the search form are 'Search' and 'Report Menu' buttons. A red box highlights the 'Search' button with the text 'Click Search'. Another red box highlights the COAS dropdown menu with the text 'Select "E" from the drop down COAS menu and enter Fund'. Below the search form, the results for 'E-133017' are displayed:

Financial Manager	rortega	MONA Ortega
Approver(s):	aorazi	Attilio Orazi
	rparedes	Ruben Paredes
Shopper(s):	ymancha	Bonnie Mancha
	michodge	Michael Hodges

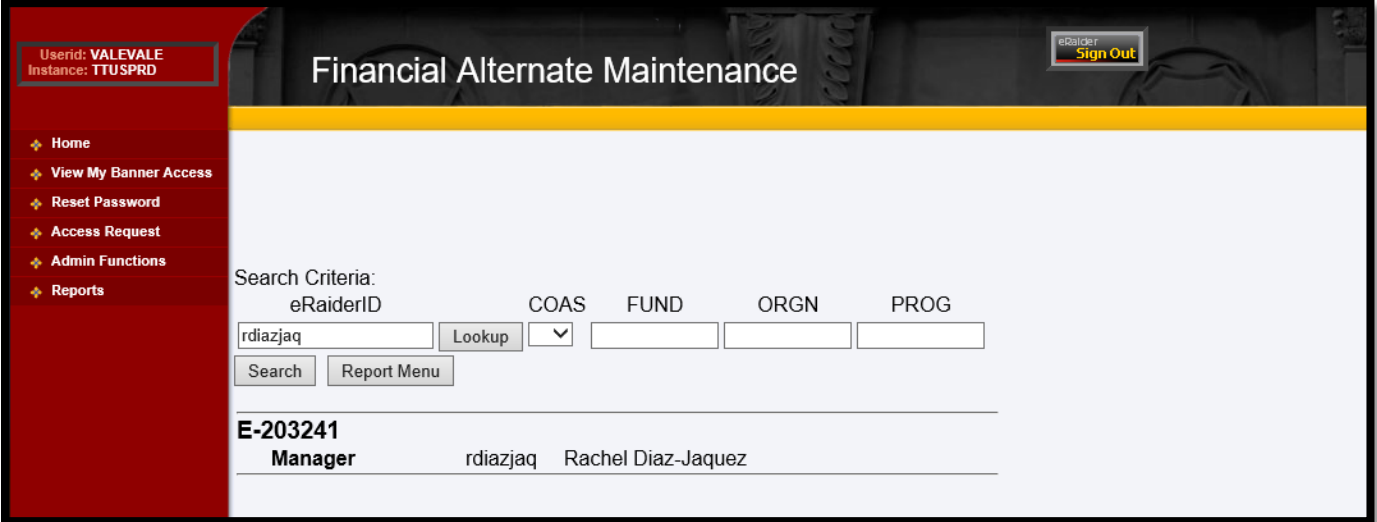
Financial Alternate Report

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 screenshot shows the 'Financial Alternate Maintenance' page. On the left is a navigation menu with options: Home, View My Banner Access, Reset Password, Access Request, Admin Functions, and Reports. The main content area has a search form with the following fields: eRaiderID (with a text box containing 'rdiazjaq'), COAS (with a dropdown menu), FUND, ORGN, and PROG. A 'Lookup' button is next to the eRaiderID field. Below the search form are 'Search' and 'Report Menu' buttons. A red box highlights the 'Search' button with the text 'Enter the eRaider ID and click Search'.

The result of the search displays the Orgn Manager and the Financial Alternate(s) for the Orgn.



Userid: VALEVALE
 Instance: TTUSPRD

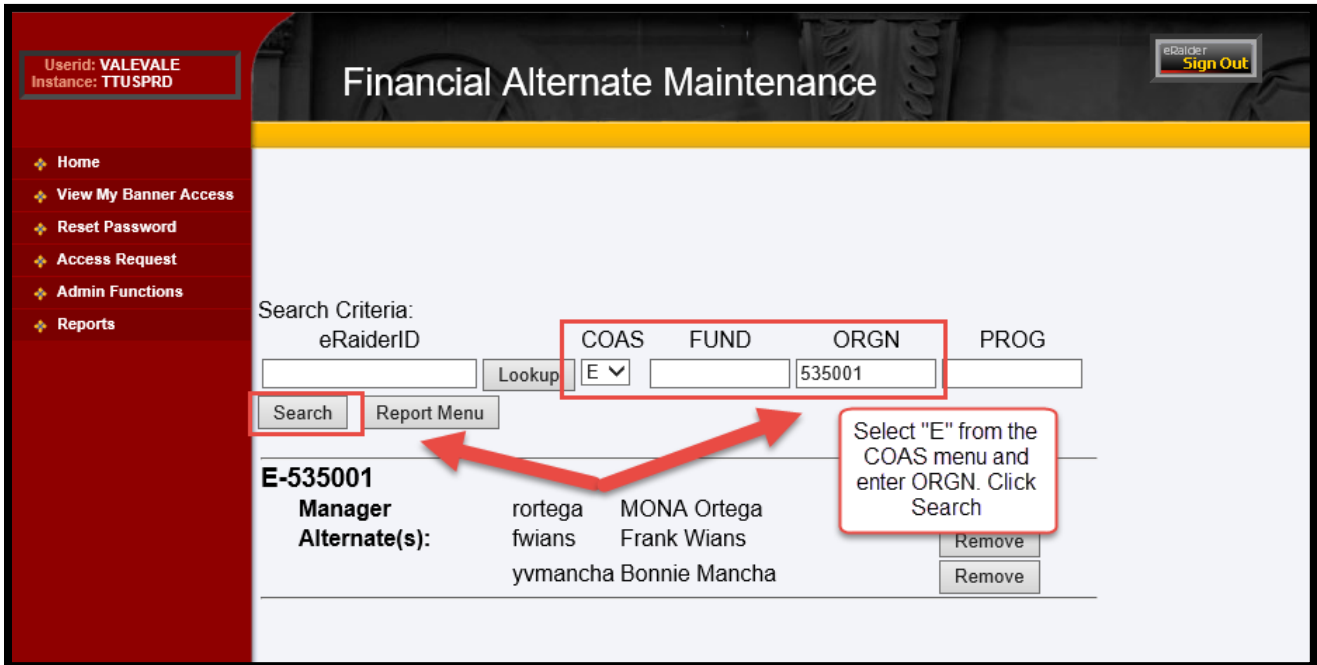
Home
 View My Banner Access
 Reset Password
 Access Request
 Admin Functions
 Reports

Financial Alternate Maintenance

Search Criteria:
 eRaiderID COAS FUND ORGN PROG
 rdiazjaq [Lookup] [▼] [] [] []
 [Search] [Report Menu]

E-203241
Manager rdiazjaq Rachel Diaz-Jaquez

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.



Userid: VALEVALE
 Instance: TTUSPRD

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

Financial Alternate Maintenance

Search Criteria:
 eRaiderID COAS FUND ORGN PROG
 [] [E ▼] [] 535001 []
 [Search] [Report Menu]

E-535001
Manager rortega MONA Ortega
Alternate(s): fwians Frank Wians
 yvmancha Bonnie Mancha

[Remove]
 [Remove]

Select "E" from the COAS menu and enter ORGN. Click Search

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