

Budget Prep Security

Updated May 2026
Texas Tech University Health Sciences Center
Budget Office

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Review Budget Prep Security

Budget Prep security will need to be reviewed before each budget prep cycle. Please verify that the correct individuals have access to the budget prep system. See below for TEAM application reports to help you do this.

Also, if new organization codes have been added in the current fiscal year, you will need to grant yourself and others in your organization access to these new orgn codes.

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.

The screenshot displays the IBM Cognos Analytics 'Content' page. The 'Team content' tab is selected, and the 'Budget Financial Reports' folder is expanded. A list of reports is shown with columns for Name, Type, and Last Accessed. Two reports are highlighted with yellow boxes and red arrows: 'RPT_ORGN_001 - Organization Listing' and 'RPT_ORGN_002 - Organization Manager Report'. The interface also shows 'Block View' and 'List View' toggle buttons.

Name	Type	Last Accessed
RPT_FUND_003 - Budget Revision Sys - Fund Manager and Proxies	Report	4/13/2021, 1:10 PM
RPT_FUND_004 - Fund Defaults & Fund Mgrs (Chart H Only)	Report	4/13/2021, 1:19 PM
RPT_GENL_001 - Prior Year Fund Balance Available to Carry-Forward	Shortcut	3/13/2019, 2:32 PM
RPT_OPAL_005 - Operating Ledger	Report	4/26/2022, 1:20 PM
RPT_OPAL_007 - MY E&G or GT E&G Funds (HSC)	Report	8/14/2018, 10:27 AM
RPT_OPAL_020 - 7099 6006 balances	Report	1/28/2021, 12:48 PM
RPT_ORGN_001 - Organization Listing	Report	9/22/2020, 5:07 PM
RPT_ORGN_002 - Organization Manager Report	Report	1/24/2022, 2:09 PM
RPT_ORGN_003 - Organization Codes in Excel	Report	9/4/2018, 7:53 PM

Granting Budget Prep Security

STEP 1:

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

The screenshot shows the F&A Work Tools page in the Webraider portal. The page has a red sidebar on the left with navigation links: Home, Employee, Available Budget, F&A Work Tools (selected), Payroll & Tax, Supervisor, My Content, Cognos, Facilities & Safety, and News. The main content area is divided into three columns: Personnel Action, Budget, and Business Affairs. The Budget column is highlighted with a red box and a red arrow pointing to the 'Budget Prep Security (Team App)' link. A callout box says 'Choose the Budget Prep Security Link'.

F&A Work Tools
HSC / F&A Work Tools

Personnel Action

Personnel Action Notices is temporarily unavailable.

Human Resources

HR Home

- ACEBoard - Acknowledge and Celebrate Excellence! Send a TTUHSC team member an ACE card: [Link and Guide](#)
- BrassRing - Careers at Texas Tech: [Hiring Manager Portal](#)
- BrassRing - Careers at Texas Tech: [Hiring Manager](#) help links:
 - Hiring Manager Access Request Form
 - Careers at Texas Tech User Guide- Lubbock/Managed Care/Permian Basin
 - Careers at Texas Tech

Budget

Budget Home

- Reports
- Budget Forms
- Budget Basic Reference Guide
- Budget Revision System
 - Budget Revision System User's Guide
- Organization Code Request
 - Organization Request Instructions
- Fringe Projector
 - DMFR Fringe Calculator Instructions
- Labor Redistribution
 - Labor Redistribution User's Guide
- Approval Tracking System(ATS)
- Budget Office Contact List
- Budget Office Mailbox
- Budget Prep System
 - Budget Prep User's Guide
 - **Budget Prep Security (Team App)**
 - Setting Budget Prep Security

Business Affairs

Business Affairs Home

- Finance Reporting (Cognos)
- Business Affairs Calendar
- Business Affairs News

Accounting Services

Accounting Services Home

- Financial Manager Change Request Information
- Fund Maintenance System
 - New Fund Request Information
- Approval Tracking System (ATS)
- Forms
- Grant Accounting
- Cash Fund Training
 - Deposit Procedures

STEP 2:

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

Userid: LWILMETH
Instance: TTUSPRD

Quick Links

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

Welcome to the TEAM!

What would you like to do today?

[Reset Password](#)
[View My Banner Access](#)
[Request Access to Banner Finance, Human Resources or Student](#)
[Use Administrative Tools](#)
[Use Reports](#)

STEP 3:

Select Budget Prep Security Request

Userid: LWILMETH
Instance: UDEV

Select Application

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

Select Application

[HR Security Request](#)
[Budget Prep Security Request](#)
[Student Security Request](#)

Note: 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.

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.

Userid: LWILMETH
Instance: UDEV

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

Sign Out

Select User

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

eRaiderID: Search for eRaiderID

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

Previous Next

Choose Next when the eraider ID is input

Input eraider ID of the employee to whom you are giving security

Search for an eraider ID by employee name if you do not know the eraider ID

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.

Userid: LWILMETH
Instance: UDEV

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

Sign Out

Select Organization Code

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

Name: Amelia Prieto
EraiderId: aprieto

Select Orgn Code

Orgn Selection

Orgns Selected

Choose the single arrow button '>' to move the highlighted orgns to the selected box.

Highlight the organization codes you would like this user to have access to.

533045 H -- Curriculum Eval Accreditation Elp
533046 H -- Pipeline for International Health
533047 H -- Community Education Elp
533048 H -- Biomedical Sciences Elp
533049 H -- Quality Improvement Elp
533050 H -- Media Services Elp
533051 H -- Media Services Elp
533061 H -- Clinic and Basic Sciences Elp
533062 H -- Deans IDC for Research Elp
533063 H -- Development Paul L Foster
533064 H -- Finance and Admin Paul L Foster
533065 H -- HR Paul L Foster
533066 H -- Comm and Mktg Paul L Foster
5330Z H -- SOM Elp Reserve

5335 H -- SOM Clinical Departments Elp
5330 H -- School of Allied Health Sciences

STEP 6:

Then choose the Submit button to add the security.

The screenshot shows the 'Orgn Selection' interface. On the left, under 'Select Orgn Code', is a list of organization codes and names. On the right, under 'Orgns Selected', is a list of the selected organization codes and names. A red arrow points to the 'Submit' button at the bottom.

Name: Amelia Prieto
EraiderId: aprieto

Orgn Selection

Select Orgn Code

- 1010 H -- President Lbk
- 10100 H -- President Lbk
- 101000 H -- President Lbk
- 101001 H -- President Lbk
- 101002 H -- HSC Women in Hlth Lbk
- 101003 H -- President Legislative Act Lbk
- 101004 H -- Faculty Senate Lbk
- 101005 H -- Presidential Priorities
- 10101 H -- HSC Relations Lbk
- 101010 H -- HSC Relations Lbk
- 101011 H -- HSC Relations Lbk
- 10102 H -- Institutional Compliance Offc Lbk
- 101020 H -- Institutional Compliance Offc Lbk
- 101021 H -- Inst Compliance Oversight Lbk

Orgns Selected

- 533049 H -- Quality Improvement Elp
- 533050 H -- Media Services Elp
- 533051 H -- Media Services Elp
- 5335 H -- SOM Clinical Departments Elp
- H30 H -- School of Allied Health Sciences

Previous **Submit**

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.

The screenshot shows the 'Confirmation' screen. It displays the user's request has been submitted and provides a summary of the request. The summary includes the eRaider ID, Tech ID, and the organization codes granted access.

Userid: LWILMETH
Instance: UDEV

Confirmation

Your Request has been Submitted.

Submit Another Request

Budget Prep Security Request Summary

eRaider ID: aprieto - Amelia Prieto
Tech ID: R00520466

Amelia Prieto has been granted access to update Budget Prep data for the organization code (s) listed below:

- H 533049 - Quality Improvement Elp
- H 533050 - Media Services Elp
- H 533051 - Media Services Elp

Please contact your Institutional Budget Office if you have any questions.

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 shows a web application interface for 'Orgn Selection'. On the left, a sidebar contains 'Admin Functions' and 'Reports'. The main area displays user information: Name: Amelia Prieto, EraiderId: 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, 10100 H -- President Lbk, 101000 H -- President Lbk, 101001 H -- President Lbk, 101002 H -- HSC Women in Hlth Lbk, 101003 H -- President Legislative Act Lbk, 101004 H -- Faculty Senate Lbk, 101005 H -- Presidential Priorities, 10101 H -- HSC Relations Lbk, 101010 H -- HSC Relations Lbk, 101011 H -- HSC Relations Lbk, 10102 H -- Institutional Compliance Offc Lbk, 101020 H -- Institutional Compliance Offc Lbk, and 101021 H -- Inst Compliance Oversight Lbk. The 'Orgns Selected' column lists 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. Between the columns are buttons for selection: '>>', '>', '<', and '<<'. A red box highlights the '<' and '<<' buttons, with an arrow pointing to them and a text box saying 'Use the deselect orgn buttons'. Another red arrow points to the '533051 H -- Media Services Elp' entry in the 'Orgns Selected' column, with a text box saying 'Highlight the organization codes to remove.'

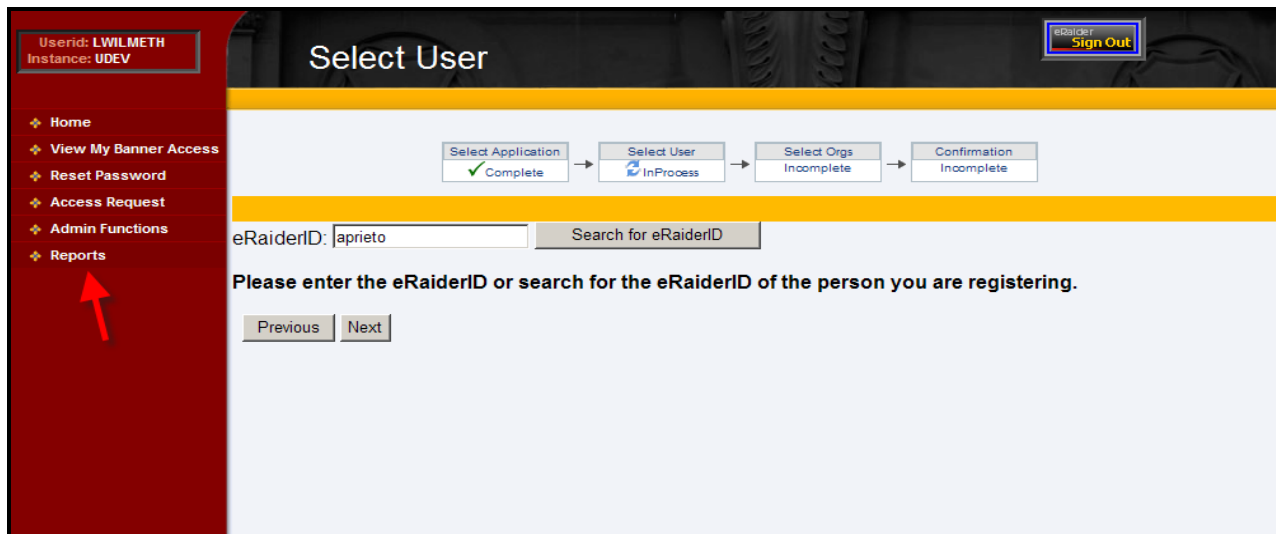
Then follow Steps 6 and 7 above.

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.

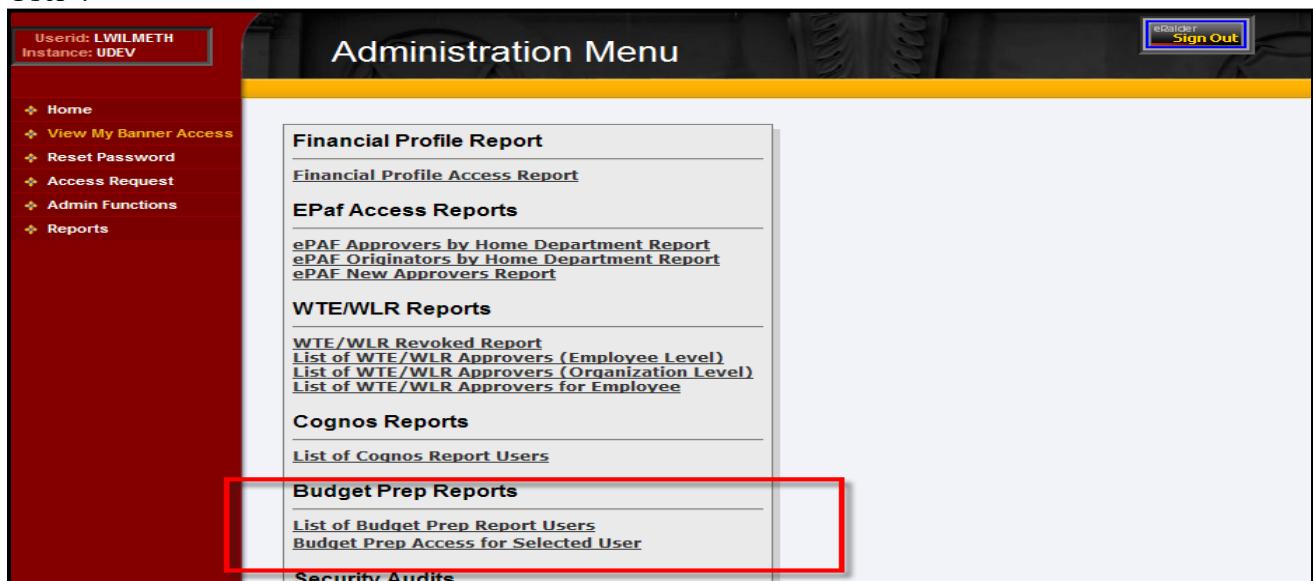


STEP 2:

Select the report you would like to run.

You can choose to see all users with access to your organization code with “List or 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.

Userid: LWILMETH
Instance: UDEV

Budget Prep Users Lookup

Sign Out

Home

View My Banner Access

Reset Password

Access Request

Admin Functions

Reports

Please select a home department from the Drop Down List.

Home Department:

402402 H -- SOP Deans Office Ama

?

Get Budget Prep Users

Report Menu

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.

Home

View My Banner Access

Reset Password

Access Request

Admin Functions

Reports

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.

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

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: 40

Name	Job Title	Eraider ID	Oracle ID	Tech ID	COAS Code	ORGN Code	ORGN Title
Crystal Davis	Sr Analyst	crdavis	CRD430	R00360006	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.

Userid: LWLMETH
Instance: UDEV

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

Budget Prep Orgs Lookup

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.

The screenshot shows a web application interface for "Budget Prep Orgs Lookup". On the left is a red sidebar with navigation links: Home, View My Banner Access, Reset Password, Access Request, Admin Functions, and Reports. The main content area has a header "Budget Prep Orgs Lookup" and a yellow banner with the text "Please type in your desired user." Below this is a search bar with "eRaiderID: smathiso" and a "Lookup eRaider" button. There are also buttons for "Get Budget Prep Users" and "Report Menu". The main report area is titled "Budget Prep Report Orgs:" and shows a table with 8 columns: Name, Job Title, Eraider ID, Oracle ID, Tech ID, COAS Code, ORGN Code, and ORGN Title. The table displays three rows for "Sheralyn Mathison" with job title "Sr Analyst". The ORGN codes are 5115, 69100, and H53, corresponding to "SOM Basic Sciences Lbk", "TDCJ Lbk", and "Paul L Foster School of Medicine".

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

List of Budget Prep Orgn Security

In Cognos, you can verify who has access to your orgns in a report view.

Budget> Budget Prep> HSC and HSC EL PASO > Step1: Pre-Prep Reports > 003_Secur - Budget Prep Orgn Security

The screenshot shows the IBM Cognos Analytics interface. The top navigation bar includes "IBM Cognos Analytics", "Content", and search, chat, help, and user icons. The main content area is titled "Step 1: Pre-Prep Reports" and has tabs for "My content", "Team content", "Samples", and "Favorites". The "Team content" tab is selected, showing a breadcrumb trail: "Team content / Budget / Budget Prep / HSC and HSC EL PASO / Step 1: Pre-Prep Reports". Below the breadcrumb is a list of reports. The first report, "003_SECUR - Budget Prep Orgn Security", is highlighted with a red box. Other reports include "005_JOBS - Employee, Current Posn, FTE and Salary", "010_BUDEV - List of Banner FOPs", and "030_BUDEV - Y - Budget Development Detail Report with YTD Activity".

☐	Name	Type	Last Modified	
☐	003_SECUR - Budget Prep Orgn Security	Shortcut	2/6/2025, 11:47 AM	♥ :
☐	005_JOBS - Employee, Current Posn, FTE and Salary	Shortcut	5/6/2019, 3:56 PM	♥ :
☐	010_BUDEV - List of Banner FOPs	Shortcut	5/1/2015, 2:07 PM	♥ :
☐	030_BUDEV - Y - Budget Development Detail Report with YTD Activity	Shortcut	4/2/2015, 12:26 PM	♥ :

Just selecting “H” from the Orgn tree will render a list of all orgns you have security to view.

Enter an Organization Code : (Organization Level 7 Code) (Optional)

Select the Organization(s) (Optional)

- ☒ E - TTU Health Sciences Ctr at El Paso
- ☒ H - Texas Tech Univ Health Sciences Ctr
 - ☒ H10 - President
 - ☒ H11 - External Relations