



The TEAM Application is the electronic registration/security process used for TTUHSC 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. 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 Fund Maintenance System applications.

The system can be accessed from:

- [TEAM Application](#)
- [WebRaider Portal](#) > Business Affairs tab > Links to Financial Systems > TEAM Application

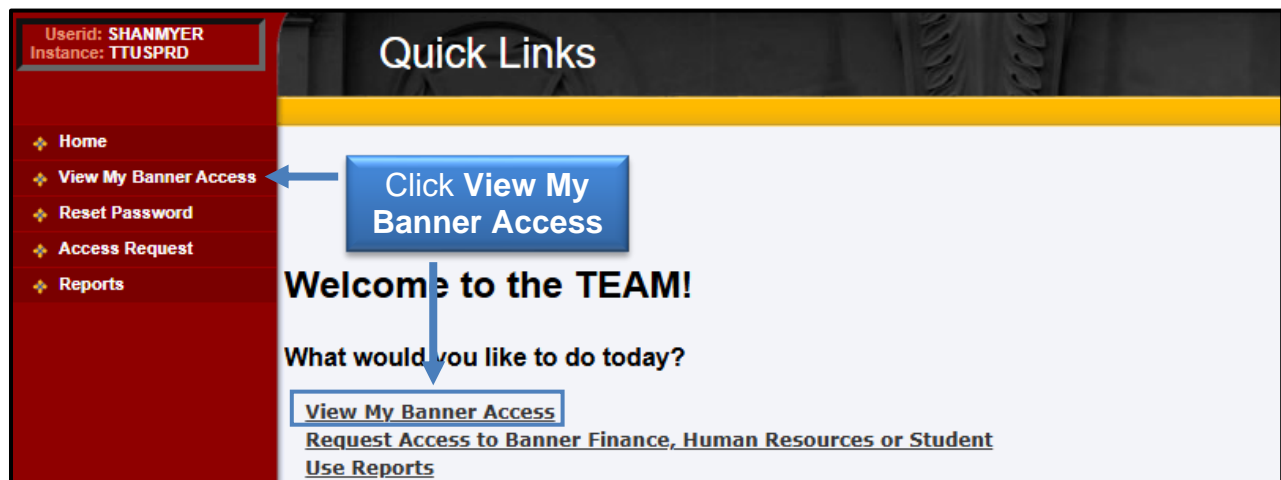
The TEAM Application Information link provides training documentation for the TEAM Application.

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 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.



TEAM Financial Registration Help

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, FiTS or Banner, 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, FiTS Security and Banner Security Classes)

View My Banner Access

Userid: SHANMYER
Instance: TTUSPRD

Home
View My Banner Access
Reset Password
Access Request
Reports

Name: Shanmyer
eRaiderID:
Oracle ID: UX
Tech ID: R11
Status: Open
Dept: F
Job Title: S
Xtender: N

Status may show Inactive or Locked

List of Banner Classes

ORACLE ID
UX
TEXAS TECH

Banner Classes:

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

Class Code	Class Description	Activity Date
TT_GEN_CHANNEL_C	General Portal Channels	

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.

Quick Links

Userid: SHANMYER
Instance: TTUSPRD

Home
View My Banner Access
Reset Password
Access Request

Click Reset Password

TEAM Financial Registration Help

The OracleID Password Reset page will open. This page features your Oracle ID and provides a text box to provide and submit a new password by following the requirements and guidelines.

Please 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 provide a list of rules that must be adhered to when entering your new password.

Enter a **new password** in the Password text box and click **Confirm Reset**.

The screenshot shows the OracleID Password Reset page. On the left is a dark sidebar menu with the TTU logo and links for 'OracleID Password Reset', 'ODBC Request Form', and 'View My Access'. The main content area has a header with the user's email 'shannon.myers@ttuhsc.edu' and a 'Logout' button. Below the header is a 'Reset Password' section. It includes a 'Disclaimer (PLEASE READ)' with text about Banner security and user responsibilities. Below the disclaimer is a form with 'Oracle Id: UXC' and a 'Password:' field with a placeholder 'Enter password'. A blue arrow points to the password field with the text 'Enter New Password'. To the right of the password field is a green 'Confirm Reset' button, with a blue arrow pointing to it and the text 'Click Confirm Reset'. Below the form are two sections: 'Password Requirements' and 'Password Guidelines'. The requirements list rules like 'Must contain at least 1 uppercase letter (A-Z)', 'Must contain at least 1 lowercase letter (a-z)', 'Must contain at least 1 numeric character (0-9)', and 'Must contain 9-15 characters'. The guidelines list rules like 'Passwords are Case sensitive', 'Passwords expire every 180 days', and 'Passwords can only be reused after 365 days pass and 4 password changes are made'. A note at the bottom states: 'Note: Your password will be changed in the following instances: Banner/ODS instances: TTUSPRD, UDEV, PDEV, ODSPROD, ODSDEV, ODSAUXT, ODSAUXP, Appworx instances: PROD_APPWORX, TEST_APPWORX, PDEV_APPWORX'.

Your password will only be changed in TTUSPRD and will expire every 180 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.

This screenshot shows the same OracleID Password Reset page, but with a blue box overlaid on the 'Confirm Reset' button that says 'Password is changed'. Below the password reset form is a table showing the status of the password change for different Banner/ODS instances. The table has two columns: 'Banner/ODS Instance' and 'Status'. The instances listed are TTUSPRD, UDEV, and PDEV. The status for all three is 'Password Changed'.

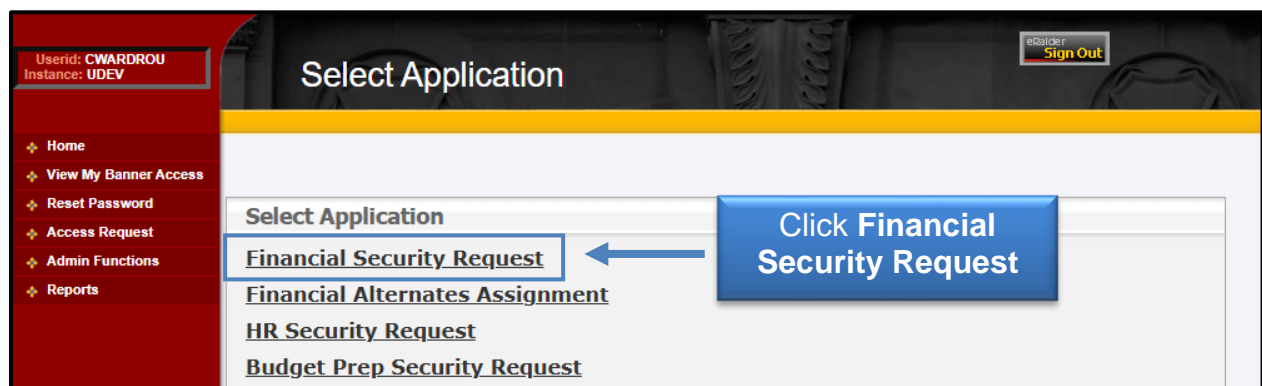
Banner/ODS Instance	Status
TTUSPRD	Password Changed
UDEV	Password Changed
PDEV	Password Changed

TechBuy User Access

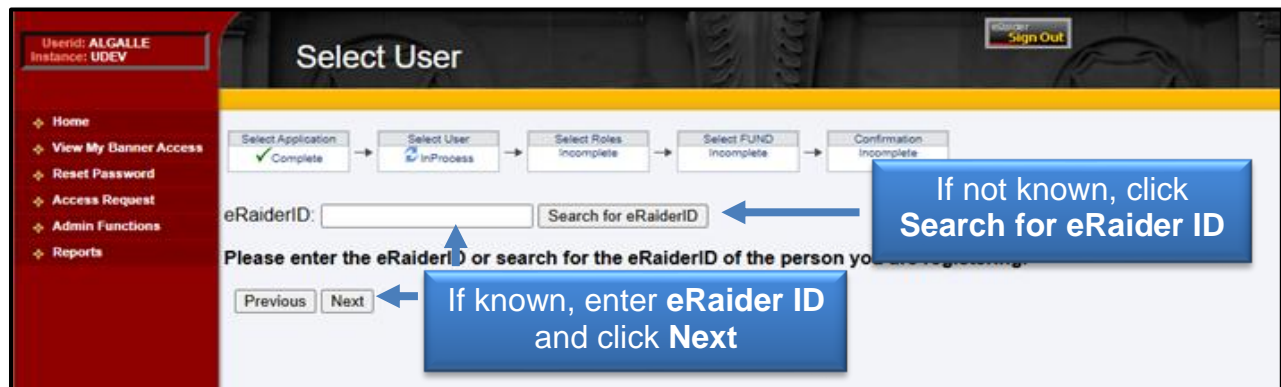
To request TechBuy user access, click **Access Request** from the menu bar on the left side of the page. You can also use the **Request Access to Banner Finance, Human Resources or Student** link from the Home page Quick Links.

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 **Financial Security Request**.



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

TEAM Financial Registration Help

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.**

Last Name	First Name	Middle Name	Department	Job Title
			FINANCE	SYSTEMS MGMT LBK

The eRaider ID of the selected employee will now be inserted into the eRaider ID field. Click **Next**.

eRaider ID is inserted

Previous Next

Click Next

TEAM Financial Registration Help

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 **Next**.

Userid: ALGALLE
Instance: UDEV

Sign Out

Select Roles

Select Application Complete → Select User Complete → Select Roles In Process → Select FUND Incomplete → Confirmation Incomplete

Financial Role

☐ Financial Manager
☐ Approver
☐ Requester
☒ Shopper
☐ None

Select an appropriate role

Previous Next

Click 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.

TEAM Financial Registration Help

The Financial Manager's list of 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.

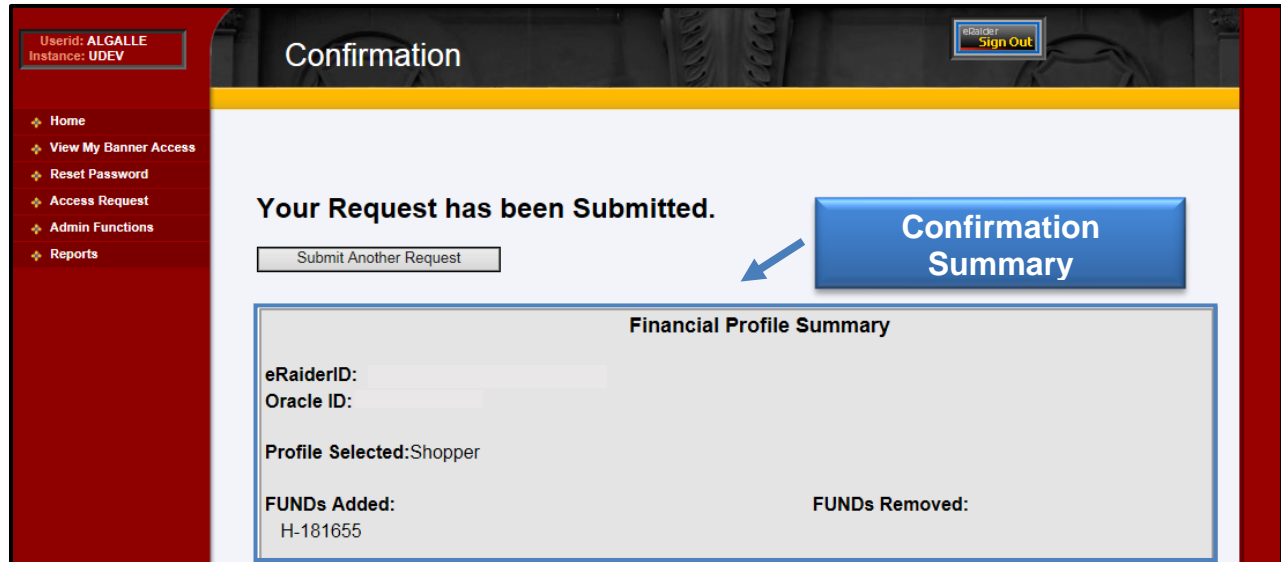
The screenshot shows the 'Select Funds' interface. At the top, a progress bar indicates the steps: Select Application (Complete), Select User (Complete), Select Roles (Complete), Select FUND (InProcess), and Confirmation (Incomplete). The user information at the top left shows 'Userid: ALGALLE' and 'Instance: UDEV'. A sidebar on the left contains links: Home, View My Banner Access, Reset Password, Access Request, Admin Functions, and Reports. The main area is titled 'Fund Selection' and contains two list boxes: 'Available FUNDS' and 'Selected FUNDS'. The 'Available FUNDS' list contains the fund 'H-181388'. A blue callout box with an arrow points to this fund with the text 'Select the funds'. Between the two list boxes are four arrow buttons: '>>', '>', '<', and '<<'. A blue callout box with an arrow points to the '>' button with the text 'Click the arrow to move funds'. At the bottom of the main area are 'Previous' and 'Submit' buttons.

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

This screenshot shows the same 'Fund Selection' interface as the previous one, but with the fund 'H-181388' now moved to the 'Selected FUNDS' list. A blue callout box with an arrow points to the fund in the 'Selected FUNDS' list with the text 'Verify the funds'. At the bottom of the main area, a blue callout box with an arrow points to the 'Submit' button with the text 'Click Submit'.

TEAM Financial Registration Help

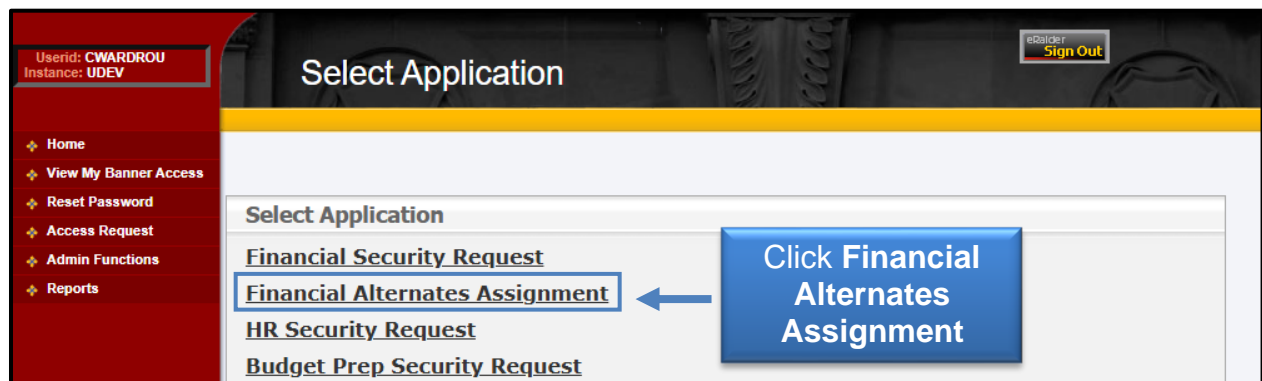
Once you submit the request, you will receive a Confirmation screen. It will provide a one-page summary of the access request that displays the name of the person, the Profile Selected (the role assigned as a TechBuy user), and the FUNDS Added (the fund(s) the employee should have access to spend against).



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

Financial Alternates Assignment

To register a Financial Alternate to serve as a backup for the Orgn Manager for a New Fund Request Approval, click 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 **Next**. If you do not know the eRaider ID, click the **Search for eRaider ID** button.

TEAM Financial Registration Help

Userid: **ALGALLE**
Instance: **UDEV**

Select User

Enter eRaider ID

Progress: Complete → 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.

Previous **Next** Click Next

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.

Userid: **ALGALLE**
Instance: **UDEV**

Assign Alternates

Progress: Select Application Complete → Select User Complete → Select F/O InProcess → Confirmation Incomplete

Name:
EraiderId:

Select F/O Code

F/O Selection

F/O Selected

Select Orgn codes by highlighting and click Arrow

Previous Submit

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

TEAM Financial Registration Help

The screenshot shows the 'Assign Alternates' page. At the top, a progress bar indicates the status of four steps: 'Select Application' (Complete), 'Select User' (Complete), 'Select F/O' (InProcess), and 'Confirmation' (Incomplete). Below this, there are input fields for 'Name:' and 'EraiderId:'. A 'Select F/O Code' dropdown is on the left, and an 'F/O Selection' area in the center shows 'H-201102 (Orgn)' selected. A blue button labeled 'Verify Orgn codes' is positioned below the selection area. At the bottom, there are 'Previous' and 'Submit' buttons, with a large blue arrow pointing to the 'Submit' button and the text 'Click 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 Orgn code(s).

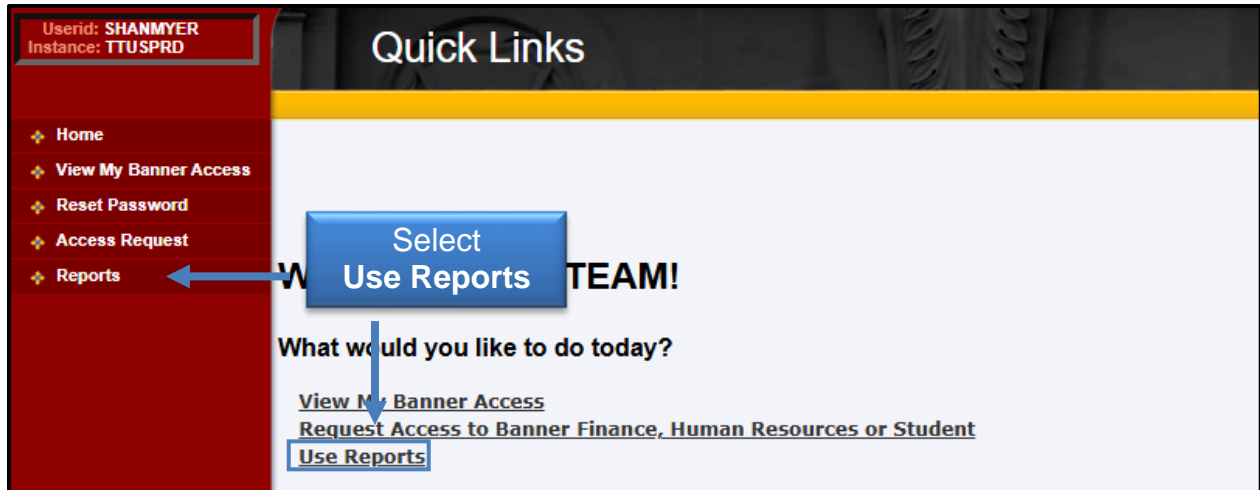
The screenshot shows the 'Confirmation' page. It features a message: 'Your Request has been Submitted.' Below this is a 'Submit Another Request' button. A section titled 'Financial Alternate Security Request Summary' contains the following information: 'eRaider ID:', 'Tech ID:', and a summary statement: 'Shannon Myers has been approved for Financial Alternate access for the fund/org code(s) listed below: H - 201102 (Org)'. The left sidebar contains a menu with links: Home, View My Banner Access, Reset Password, Access Request, Admin Functions, and Reports.

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

Reports

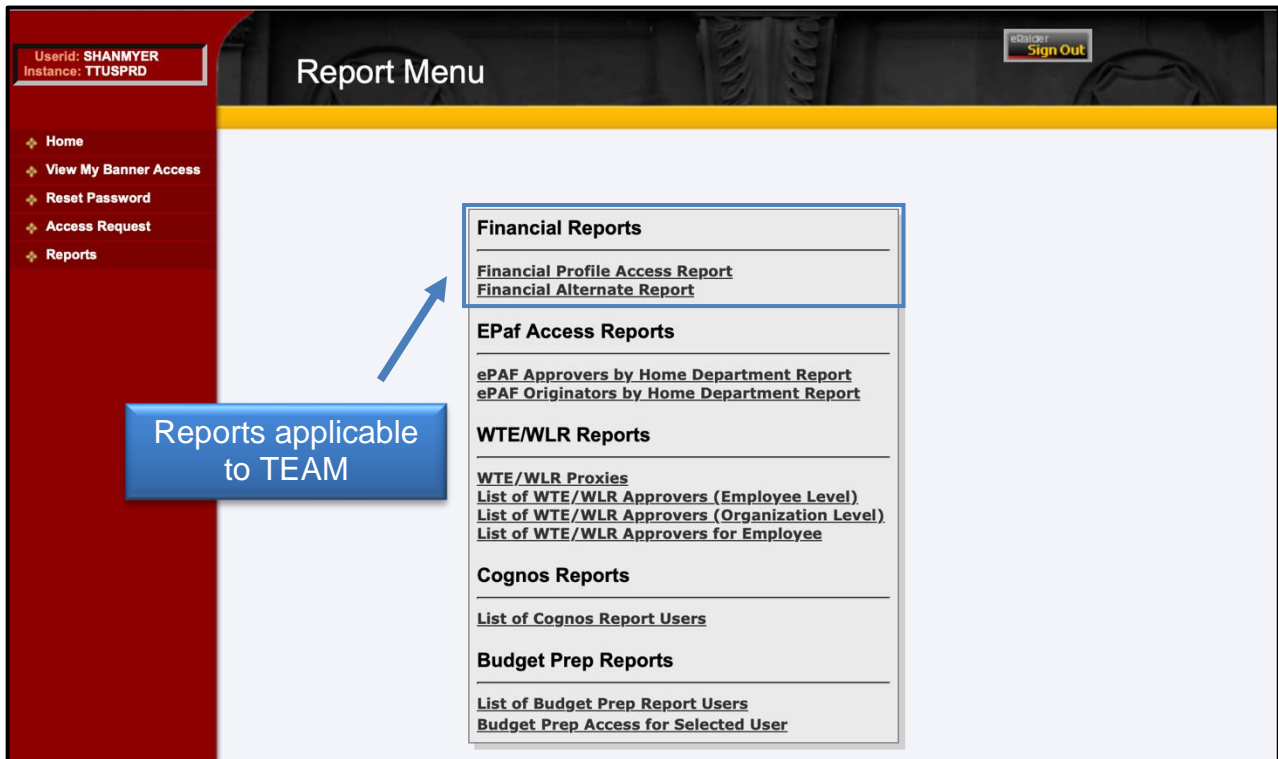
To access the reports that are available in the TEAM Application, select the **Reports** link in the menu bar on the left side of the page, or from the Home page, select **Use Reports** from the Quick Links section.

TEAM Financial Registration Help



The Financial Reports section of the Report Menu contains links to the two reports that apply 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 **Search**. If you do not know the eRaider ID, click the **Lookup** button to access the eRaider Lookup function.

The screenshot shows the 'Profile Maintenance' page. On the left is a red sidebar with a menu: Home, View My Banner Access, Reset Password, Access Request, and Reports. The top left of the main area shows 'Userid: SHANMYER' and 'Instance: TTUSPRD'. The top right has a 'Sign Out' button. The main content area has a yellow header bar. Below it, a blue box with white text says 'If known, enter the eRaider ID and click Search'. Below this, the 'Search Criteria:' section has a text box with 'algalles' and a 'Lookup' button. A blue arrow points from the 'Lookup' button to another blue box that says 'If eRaider ID not known, click Lookup'. Below the text box are 'Search' and 'Report Menu' buttons. To the right of the text box are labels for 'COAS', 'FUND', 'ORGN', and 'PROG'.

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.

The screenshot shows the 'Profile Maintenance' page with search results. The sidebar and top navigation are the same as in the previous screenshot. The 'Search Criteria:' section now shows 'algalles' in the text box, a 'Lookup' button, and a dropdown menu with 'H' selected. Below this, the results are displayed: 'H-181388' in bold, followed by 'Financial Manager' and 'Shopper(s):'. To the right of 'Shopper(s):' are two names: 'Shannon Myers' and 'Alexandra Galle'.

You can also search by Fund. Select the “**H**” (designation for HSC) from the drop-down menu in the COAS (Chart of Accounts) field. Enter the **Fund code** in the Fund text box and click **Search**. The Financial Manager and security roles for users assigned to this fund will be displayed.

TEAM Financial Registration Help

The screenshot shows the 'Profile Maintenance' page. On the left is a red sidebar with a menu: Home, View My Banner Access, Reset Password, Access Request, and Reports. The top left of the sidebar shows 'Userid: SHANMYER' and 'Instance: TTUSPRD'. The top right has a 'Sign Out' button. The main content area has a title 'Profile Maintenance'. Below it is a search criteria section with fields for 'eRaiderID', 'COAS', 'FUND', 'ORGN', and 'PROG'. The 'COAS' field has a dropdown menu with 'H' selected. The 'FUND' field contains '181388'. There are 'Search' and 'Report Menu' buttons. Annotations include a blue box 'Select "H" from the menu' pointing to the COAS dropdown, a blue box 'Enter Fund Code' pointing to the FUND field, and a blue box 'Click Search' pointing to the Search button. Below the search criteria, the text 'H-181388 Manager Shoppers: Shannon Myers' is visible.

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 **Search**. If you do not know the eRaider ID, click the **Lookup** button to access the eRaider Lookup function.

The screenshot shows the 'Financial Alternate Maintenance' page. The sidebar is the same as the previous page. The main content area has a title 'Financial Alternate Maintenance'. Below it is a search criteria section with fields for 'eRaiderID', 'COAS', 'FUND', 'ORGN', and 'PROG'. There is a 'Search' button and a 'Report Menu' button. Annotations include a blue box 'Enter the eRaider ID' pointing to the eRaiderID field and a blue box 'Click Search' pointing to the Search button.

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

The screenshot shows the search results for the Financial Alternate Report. The sidebar is the same as the previous page. The main content area has a title 'Search Criteria:'. Below it are fields for 'eRaiderID', 'COAS', 'FUND', 'ORGN', and 'PROG'. The 'eRaiderID' field contains 'algalles'. The 'COAS' field has a dropdown menu with 'H' selected. There are 'Search' and 'Report Menu' buttons. Below the search criteria, the text 'H-201102 Manager Alexandra Galle Alternate(s): Shannon Myers' is visible. There is a 'Remove' button.

TEAM Financial Registration Help

You can also search by Orgn. Select the “H” from the drop-down menu in the COAS (Chart of Accounts) field. Enter the **Orgn code** in the ORGN text box and click **Search**. The Financial Manager and Alternate(s) for this Orgn will be displayed.

The screenshot shows the 'Financial Alternate Maintenance' web application. On the left is a red sidebar with a user menu showing 'Userid: ALGALLE' and 'Instance: UDEV', and a list of links: Home, View My Banner Access, Reset Password, Access Request, Admin Functions, and Reports. The main content area has a title bar with a 'Sign Out' button. Below the title bar is a search section with the heading 'Search Criteria:'. It contains five input fields: 'eRaiderID', 'COAS', 'FUND', 'ORGN', and 'PROG'. The 'COAS' field has a dropdown menu showing 'H' with a downward arrow. The 'ORGN' field contains the text '201102'. Below these fields are 'Search' and 'Report Menu' buttons. A blue callout box with the text 'Select "H" from the drop-down menu' has an arrow pointing to the 'COAS' dropdown. Another blue callout box with the text 'Enter Orgn Code' has an arrow pointing to the 'ORGN' text box. A third blue callout box with the text 'Click Search' has an arrow pointing to the 'Search' button. Below the search fields, the text 'H-201102' is visible, followed by a table with columns for 'Name' and 'Address'. The first row of the table shows 'Alexan' and 'Shann'.

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