TeamApp Instructions

TeamApp is used to request access to TechBuy, Finance Signature Authority, HR Reports, ePAF and WTE.

The **Financial Manager** for each organization must request access via TeamApp for various applications and levels of access to systems.

To access TeamApp through Raiderlink, click on the **A&F Work Tools Tab**, in the AFISM Channel under Other Links, there is a direct link to **TeamApp** or you access it through the URL: [https://banapps.texastech.edu/team/QuickLinks.aspx](https://banapps.texastech.edu/team/QuickLinks.aspx).

To identify the Financial Manager for your Organization, you can run Cognos Finance report FI028 – Organization Hierarchy Report.

Below is an example of the FI028 report:

![FI028 Report Example](image)

**Finance Access: Signature Authority & TechBuy Authorization**

A **Financial Manager** is a TTU or TTUS employee who is currently a **Level 7** Organization Financial Manager. A Financial Manager has unlimited account approval authority (up to the budgeted amount for that FOP).

Financial Managers are responsible for assigning **Approver** and **Requestor** roles for use of the FOPs they manage for TechBuy and other financial systems (ex. Direct Pay, P-Card, etc.). They are also responsible for removing permissions when personnel changes occur. Financial Managers also register **Shopper** roles and delegate that responsibility to an Approver or Requestor.

Financial Managers are also responsible for complying with University budgets and spending funds for the purpose intended.

Only one Financial Manager is allowed per FOP. To request a change to the current Organization or Fund Financial Manager, please use the **Financial Manager Form** on the Accounting Services website: [http://www.depts.ttu.edu/accountingservices/forms.php](http://www.depts.ttu.edu/accountingservices/forms.php).

**Instructions for Signature Authority Authorization for Approvers, Requestors & Shoppers:**

- The **Level 7** Organization Financial Manager logs into TeamApp
  - On the left sidebar menu, click **Access Request**
Click the **Financial Profile** link
- Enter the **eRaider** for the user you are requesting permission for *(if you don’t know the eRaider, you can Search using their legal first and last name)*.
- From the **Financial Role** screen, select a role based on the level of approval that should be granted for the user:
  - **Approver** – a TTU or TTUS employee who has been given signature authority for a specific Organization(s) and their related FOPs by the Financial Manager.
    - This role has unlimited FOP approval authority *(up to the budgeted amount for that FOP)*.
    - Approvers will be responsible for complying with University budgets and spending funds for the purpose intended.
    - This role has the authority to register **Shoppers** for TechBuy.
    - Financial Managers may assign up to three Approvers per Organization.
  - **Requestor** – a TTU or TTUS employee who has been given permission in TechBuy to shop and approve Purchase Requisitions *(for specific Organization(s) and their related FOPs)* by the Financial Manager. This role applies to TechBuy ONLY.
    - This role has FOP approval authority up to $5,000.
    - Any transaction greater than $5,000 will have to go to a higher authority (Approver or Financial Manager) for approval.
    - Financial Managers may assign up to three Requestors per Organization.
    - Requestors will be responsible for complying with University budgets and spending funds for the purpose intended.
    - A TechBuy class is required for Requestors prior to obtaining access to the TechBuy system.
  - **Shopper** – this role has no spending authority. All requisitions will route for approval. This role applies to TechBuy ONLY.
  - **None** – allows the Financial Manager to delete all authorities from a user.
- From the **Orgn Selection** screen, use the arrow buttons to move the **Available Orgns** to the **Selected Orgns**. You can also use this process to remove access.
**TeamApp Instructions**

*Note: Organization(s) selected allows authorization to ALL FOPs related to the selected Organization.*

A **Default Ship to Location** is also required. There is a drop down menu with all of the available locations.

*Note: TTU/TTUS Ship to codes will being with a T and are set up by buildings, not departments.*

- Click **Submit**.

(If Ship to Location modifications are made to an existing user, the default Ship To will change in TechBuy.

**Financial Profile Reports**

- Click on **Reports** in the left sidebar menu.
- Click on **Financial Profile Access Report**.
- Search Criteria:
  - Enter the eRaider for the user or search using their legal first and last name OR enter an Organization.
- Click on **Search**.

- Search results will provide all of the information associated with either the eRaider or the Organization (which includes):
  - Chart of Accounts
  - Financial Manager
  - Approver
  - Requestor
  - Shopper
HR Security Reports

Instructions for Authorization for ePAF, Web Time Leave, Web Time Entry and Cognos HR Reports (for Level 5 or Level 7 Organization Financial Managers):

- Click on Access Request in the left sidebar menu
- Click on HR Security Request
- Enter the eRaider for the user or search using their legal first and last name.
- From the HR Security Role Screen select a role based on the level of approval wanting to be granted.
- Click Next

Note: ePAF Originator role is assigned upon completion of the All About HR and ePAF class.

Instructions for each role are shown below:

- **ePAF Approver** – click Next to add the user as an ePAF Approver.
  - Enter the name of the previous approver that this person is replacing or enter NONE to add an Approver.
  - Click Next
  - You will receive a confirmation message that Your Request has been Submitted
    - You can now click to Submit Another Request and repeat the process if you are needing to add additional ePAF Approvers.

- **Web Time Entry (WTE) Approver or Web Leave Report (WLR) Approver** – this role authorizes a user to approve Web Time Entry (WTE) submission for non-exempt employees or approve Web Leave Reports (WLE) for exempt employees.
  - Select Approval Form and Level
    - Approval Form – Organization Level (access to FOPs related to Org) OR Employee Level (specify employee)
    - Approval Level – WTE or ELR will be submitted to the Level 1 Approver first. Once approval is applied by the Level 1 Approver, WTE or WLR will be submitted to the Level 2 Approver.
  - Click Next
  - Organization Level Selection
    - From the Orgn Selection Screen, click on the Organization code(s) that you would like and use the arrow keys to move the selected Orgn Code to the Orgns Selected column (this process can also be used to removed access)
- **Employee Level Selection** – from the **Employee Selection** screen, click on the selected employee(s). Use the arrow keys to move the **Select Employees** to the **Employees Selected** column (this can also be used to remove employees).
  - Click on **Submit**
  - You will receive a confirmation message showing a summary of your request.
    - You can click to **Submit Another Request** and repeat the process for additional WTE or WRL Approvers.

- **HR Reporting Access in Cognos** – access to these reports allows for users to review HR Reports in Cognos (this includes Payroll, Salary Rosters, Leave Balances, etc.) for Organizations and their related FOPs.
  - To provide access, from the **Orgn Selection** screen, click on the selected Organization Code(s). Use the arrow button to move the **Select Orgn Code** to the **Orgns Selected** column (this can also be used to remove access).
  - Click **Submit**
  - You will receive a confirmation message showing a summary of your request.
    - You can click to **Submit Another Request** and repeat the process for additional access to HR Reporting.