Assigning Budget Prep Security Access

The Organization / Financial Manager provides authorization for delegates to view and update the Budget Prep modules through the TEAM application.

A Financial Manager is assigned to each level of the organization hierarchy. Access may be assigned at the lowest FOP organization level or at a higher level which grants access to the lower FOP levels as well. The Financial Manager for each organization must register delegates (including themselves) via the TEAM Application to access the Budget Prep modules.

- The organization hierarchy and the assigned financial managers may be viewed in Cognos:
 - o Public Folders>TTU Finance>Fund/Org Manager Reports>F1028 Organization Hierarchy Report
- Up to 3 delegates may be assigned to each organization code.
- Assignment to a higher level of the organization hierarchy gives access to the lower level organization codes.

7 Steps to Assign Budget Prep Security Access

Step 1: Access TeamApp

Step 2: Choose "Access Request" from the menu provided.



Step 3: Select the "Budget Prep Security Request" link.

Userid: CMCCUNE Instance: TTUSPRD	Select Application
 Home View My Banner Access Reset Password Access Request Admin Functions Reports 	Select Application Financial Security Request 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 <u>eas.is@ttu.edu</u> for further assistance.

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Step 4: Enter the eRaider ID for the user for whom you are requesting access.

- If you do not know the eRaider ID, use the "Search for eRaider ID" button.
- Click the "Next" button to continue.

Userid: CMCCUNE Instance: TTUSPRD	Select U	Jser		access?	teen			eRaider Sign Out
♦ Home								
View My Banner Access		Select Application	Select User	1.0	Select Orgs	1.1	Confirmation	
Reset Password		✓ Complete →	✓ Complete	-	C InProcess	-	Incomplete	
Access Request								
Admin Functions	eRaiderID: pwebb	Sea	rch for eRaiderID					
Reports								
	Please enter the eRa	aiderlD or search fo	or the eRaide	erID c	of the perso	n you	ı are registerir	ng.

Step 5: Move the organization code from the "**Select Orgn Code**" section to the "**Orgns Selected**" section by highlighting the organization code (use the CTRL key on your keyboard to select more than one) and clicking the single arrow, --OR--

Userid: CMCCUNE Instance: TTUSPRD	Select Organization Code
 Home View My Banner Access Reset Password Access Request Admin Functions 	Select Application Complete Select User Select Orgs Confirmation Incomplete Incomplete
♣ Reports	Name: Paula Webb Fraiderld: pwebb
	Eraidend: pwebb Orgn Selection Select Orgn Code C12 T Budget and Res Planning and Mgm SS S - Texas Tech University System Admin C12000 T Budget and Res Planning and Mgr > C12000 T Budget and Res Planning and Mgr > C12000 T Budget and Res Planning and Mgr > C120AA T Budget and Res Planning and Mgr > C12AA T Budget and Res Planning and Mgr > C C

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To grant access to all the listed organization codes, click on the double arrow.

Userid: CMCCUNE Instance: TTUSPRD	Select Organization Code
 Home View My Banner Access Reset Password Access Request Admin Functions 	Select Application Complete Select User Select Orgs Confirmation Incomplete
♣ Reports	Name: Paula Webb Eraiderld: pwebb Orgn Selection Select Orgn Code Orgns Selected
	C12 T - Budget and Res Planning and Mgm C1200 T - Budget and Res Planning and Mgm C12000 T - Budget and Res Planning and Mgr C12AA T Budget and Res Pla

Step 6: Choose the "**Submit**" button to add the security.

Userid: CMCCUNE Instance: TTUSPRD	Select Organization Co	ode
 Home View My Banner Access Reset Password Access Request Admin Functions 	Select Application ✓Complete → Co	et User → Select Orgs → Confirmation Incomplete
♦ Reports	Name: Paula Webb Eraiderld: pwebb Org	gn Selection
	Select Orgn Code	Orgns Selected C12000 T Budget and Res Planning and Mgmt SS S Texas Tech University System Admin TT T Texas Tech University
	Previous Submit	

Step 7: A confirmation showing a summary of the request is displayed.



Removing Budget Prep Security Access

To remove security, refer to **Step 5** and choose the deselect arrows to remove organization codes from the "**Orgns Selected**" section.

Userid: CMCCUNE Instance: TTUSPRD	Select Organization Code			
 Home View My Banner Access Reset Password Access Request Admin Functions 	Select Application	→ Select Orgs ✓ InProcess → Confirmation Incomplete		
✦ Reports	Name: Paula Webb Eraiderld: pwebb Orgn Selection Select Orgn Code C12 T - Budget and Res Planning and Mgmt C12000 T - Edget and Res Planning and Mgmt			
	C1200 I Budget and Res Planning and Mgr C12AA T Budget and Res Planning and Mgr C	SS 5 – Ukas Tech University System Admin		
	Previous			



Contact Us: <u>dmfr.support@ttu.edu</u> Visit us on the web: <u>http://www.depts.ttu.edu/dmfr/</u> DMFR Training Website: <u>https://apps.dmfr.ttu.edu/training/</u> DMFR Portal <u>https://portal.dmfr.ttu.edu</u>

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