

Granting Access to TechBuy

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

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:

| CHART | LEVEL 2: DIVISION | DIVISION DESCRIPTION Financial Manager | LEVEL 4: AREA | AREA DESCRIPTION Financial Manager | LEVEL 5: DEPARTMENT | DEPARTMENT DESCRIPTION Financial Manager | LEVEL 6: SECTION | SECTION DESCRIPTION Financial Manager | LEVEL 7: UNIT | UNIT DESCRIPTION Financial Description |
|-------|-------------------|--|---------------|--|---------------------|---|------------------|---|---------------|---|
| T | B | Provost and Academic Affairs Winer, Jane L. | B51 | College Ag Sci and Natural Resource Burns, John | B5105 | Natural Resources Management Fish, Ernest B. | B51AG | Natural Resources Management Fish, Ernest B. | B51087 | Brad Dabbert Dabbert, Charles B. |

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).

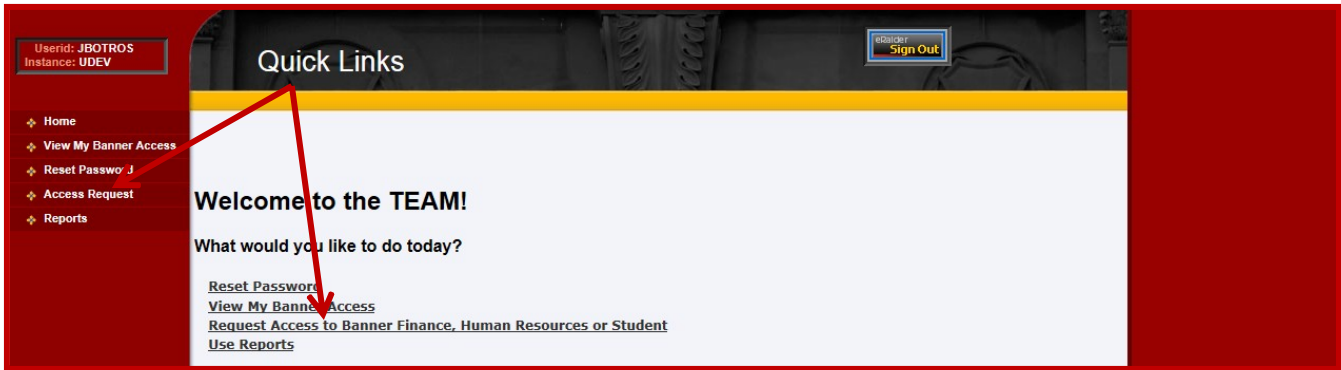
Financial Managers are responsible for...

- complying with university budgets and spending funds for the purpose intended.
- assigning Shopper, Requester and Approver roles for use of the FOPs they manage for TechBuy and other financial systems (ex. Direct Pay, P-Card, etc.).
- removing permissions when personnel changes occur.

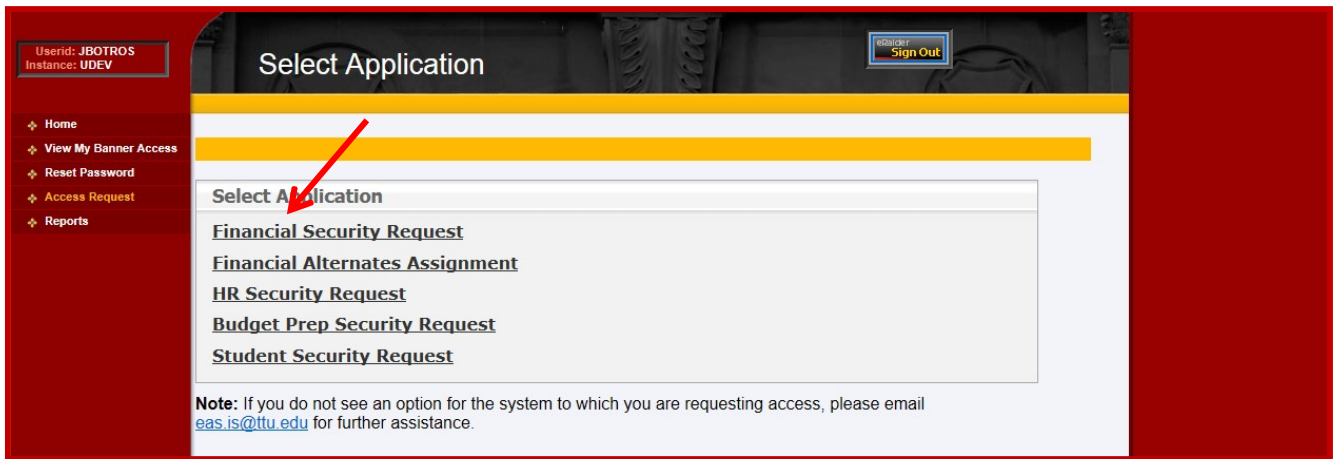
Only one Financial Manager is allowed per FOP. To request a change to the current Organization/Financial Manager, please visit the [Finance New FOP](#) application.

To access TeamApp log in to *Raiderlink* > *A&F Work Tools tab* > *DMFR channel* > *Other Links* > *TeamApp* or go directly to <https://banapps.texastech.edu/team/QuickLinks.aspx> .

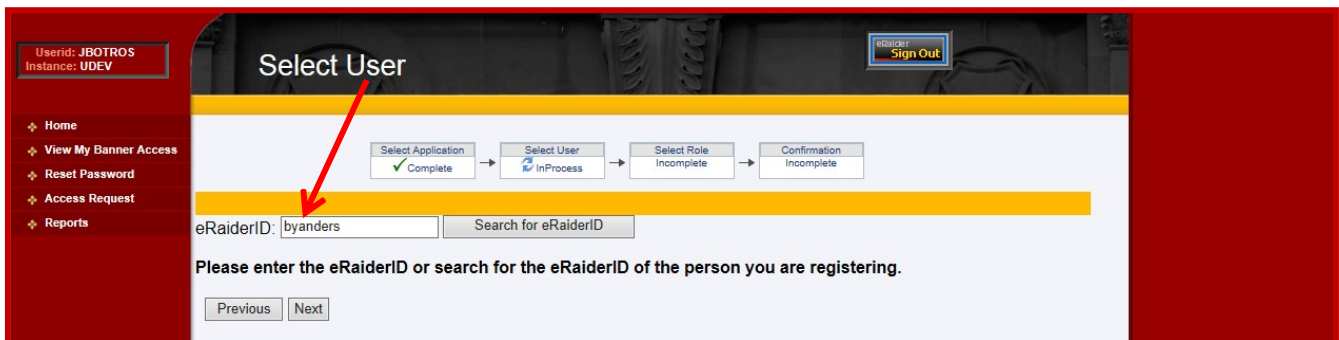
1. On the Quick Links Page, click Access Request



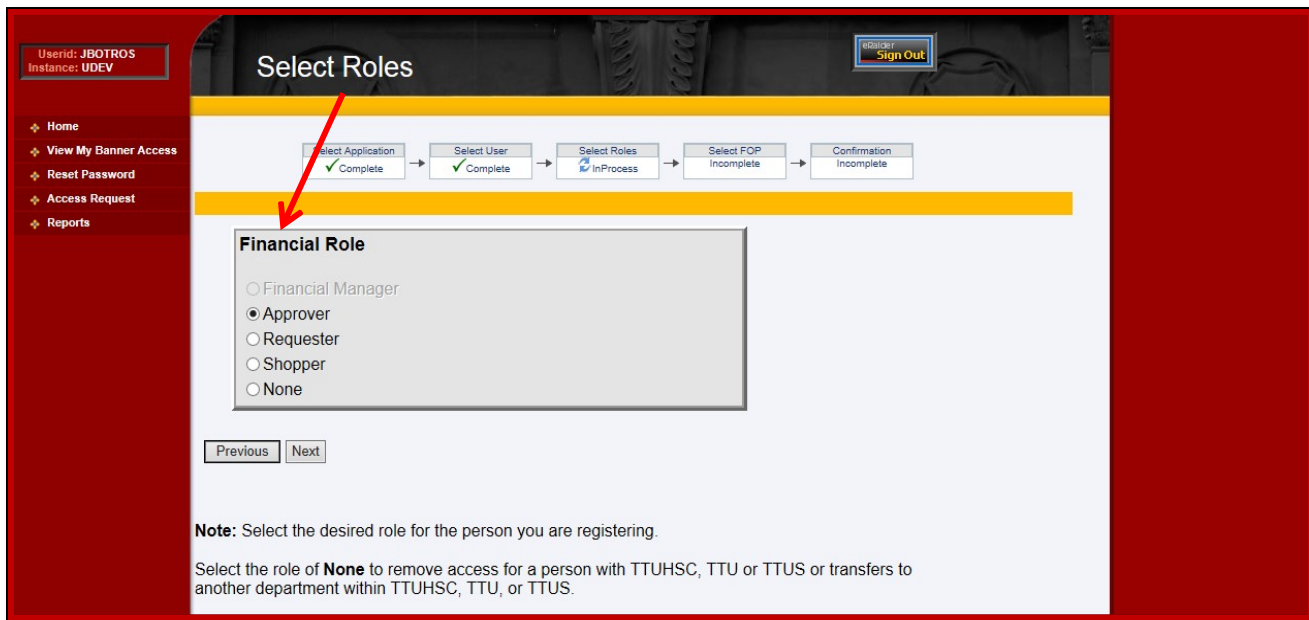
2. On the Select Application page, click Financial Security Request



3. On the Select User page, enter the employee's eRaider ID



4. On the Select Roles page, select one Financial Role (None will remove all Orgns from the employee).



Approver

- A TTU or TTUS employee who has been given signature authority for specific Organizations and their related FOPs by the Financial Manager.
- Approvers will be responsible for complying with university budgets and for spending funds (up to the budgeted amount for that FOP) for the purpose intended.
- An Approver will have the authority to register Shoppers for the TechBuy system.
- Financial Managers may assign up to three Approvers per Organization.

Requestor (This Role applies to TechBuy Only)

- A TTU or TTUS employee who has been given permission in TechBuy to shop and approve Purchase Requisitions (up to \$5,000) for specific Organizations and their related FOPs by the Financial Manager.
- Transactions greater than \$5,000 must go to a higher authority (Approver or Financial Manager) for approval.
- Requestors will be responsible for complying with university budgets and spending funds for the purpose intended.
- Financial Managers may assign up to three Requestors per Organization.

Shopper (This Role applies to TechBuy Only)

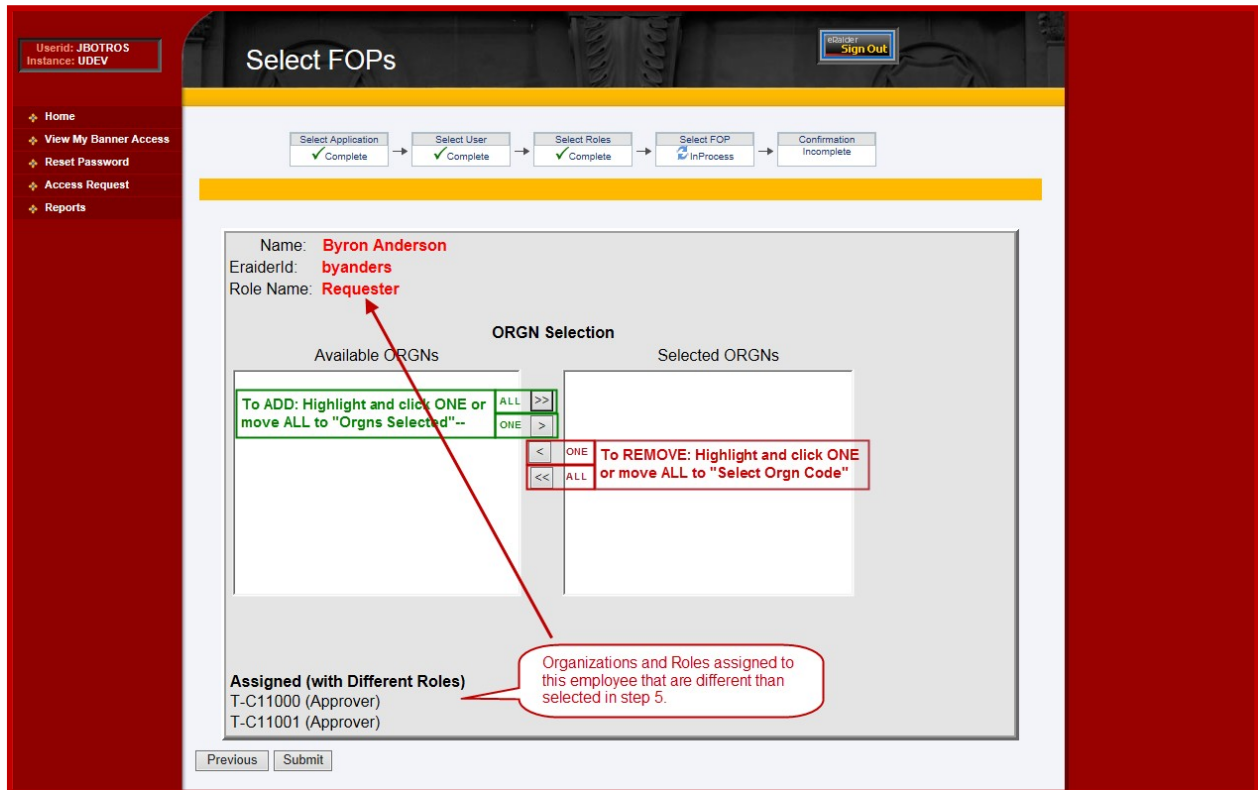
- No spending authority: all requisitions will route for approval.

None

- allows the Financial Manager to delete **all** authorities from a user.

To view current role assignments, TEAM App Reports includes a Financial Profile Access Report which can present the roles assigned for an organization, or the organization roles assigned to an employee.

- Add or Remove Organizations for this Role. When “None” is selected, all Organizations are automatically moved to “Available ORGNs”.
- Click Submit.



- A Confirmation of FOPs (Chart and Organizations) Added/Removed is displayed.
- Close the browser window to exit or choose another link in TEAM App.

