Assigning Finance and TechBuy Approval Roles

Every Organization has an Organization Manager (Org Mgr) who follows these instructions to grant Finance and TechBuy access to an employee. If the Organization experiences an Org Mgr change, the change is reported on the Financial Manager form found with other finance forms on the Finance website (ie, the Org Mgr cannot be changed using TEAM App).

In steps 4-5 of the instructions below, the Org Mgr adds or removes a role to the employee. Following are definitions of the roles:

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. A TechBuy training class is required for Requestors prior to obtaining access to the TechBuy system

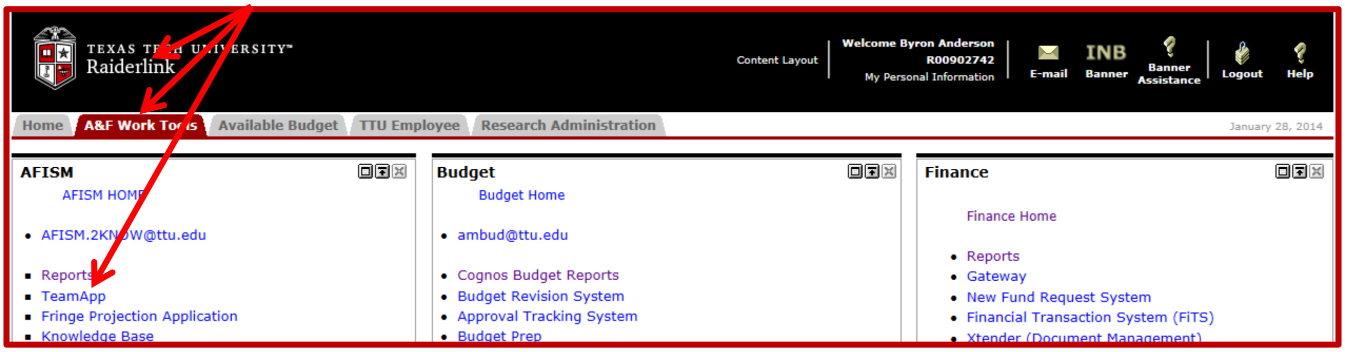
Shopper (This Role applies to TechBuy Only) – no spending authority; all requisitions will route for approval. A TechBuy training class is required for Shoppers prior to obtaining access to the TechBuy system

None – allows the Financial Manager to delete **<u>all</u>** authorities from a user.

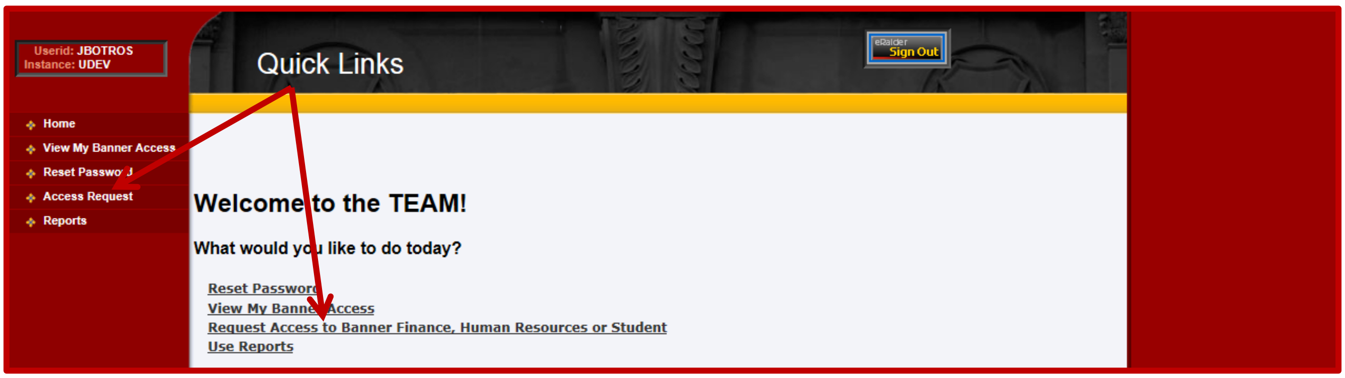
To view current role assignments, TEAM App Reports includes a <u>Financial profile Access Report</u> which can present the roles assigned for an organization, or the organization roles assigned to an employee.

Follow These Steps (see screenshots below): Pg

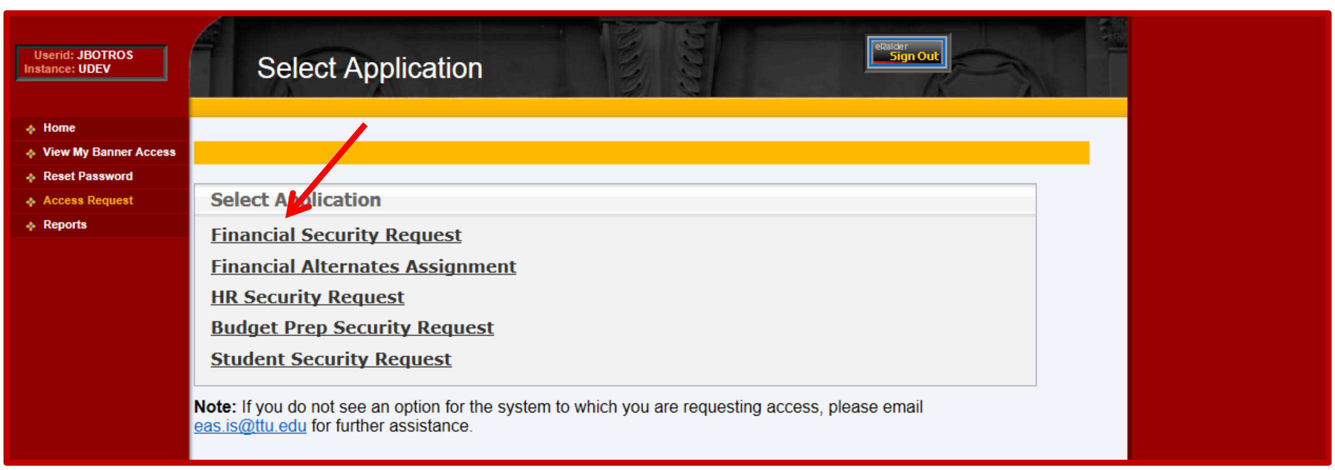
1. **The Org Mgr signs into RaiderLink, the A&F Work Tools tab, to click on TEAMApp**



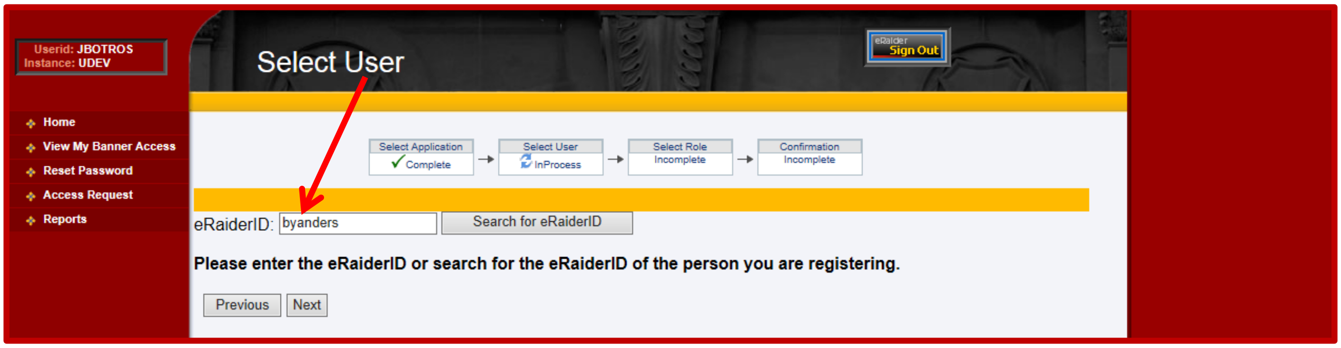
2. **On the Quick Links Page, click Access Request**



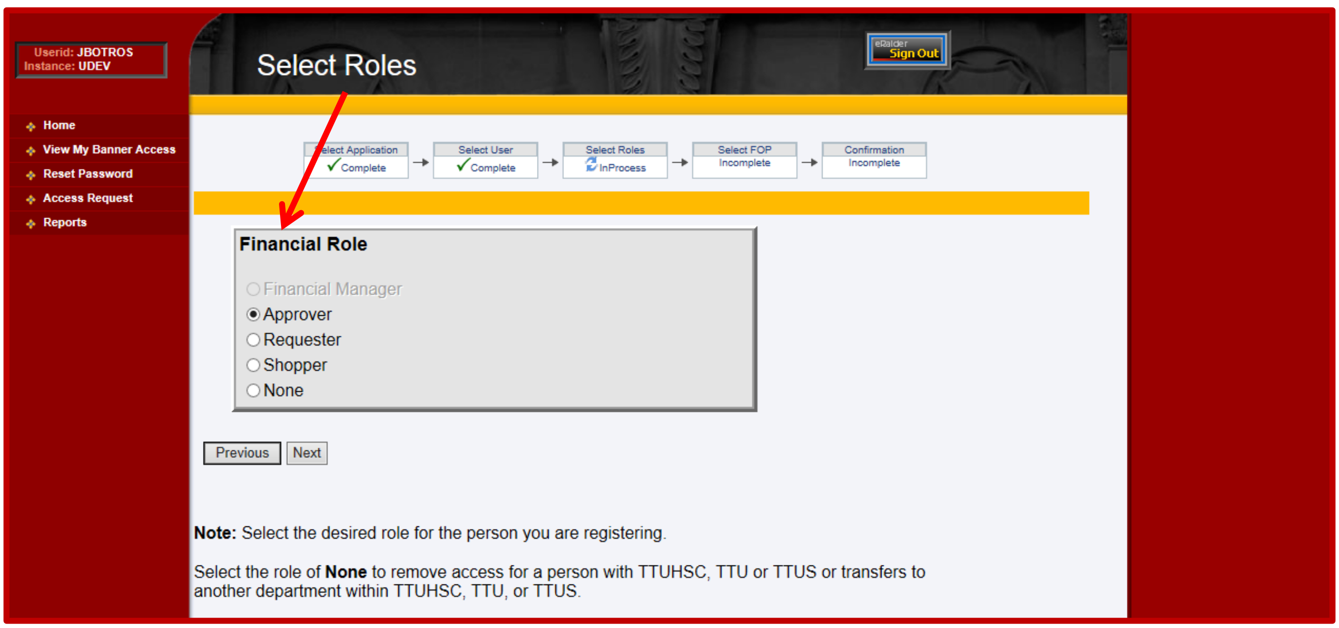
3. **On the Select Application page, click Financial Security Access**



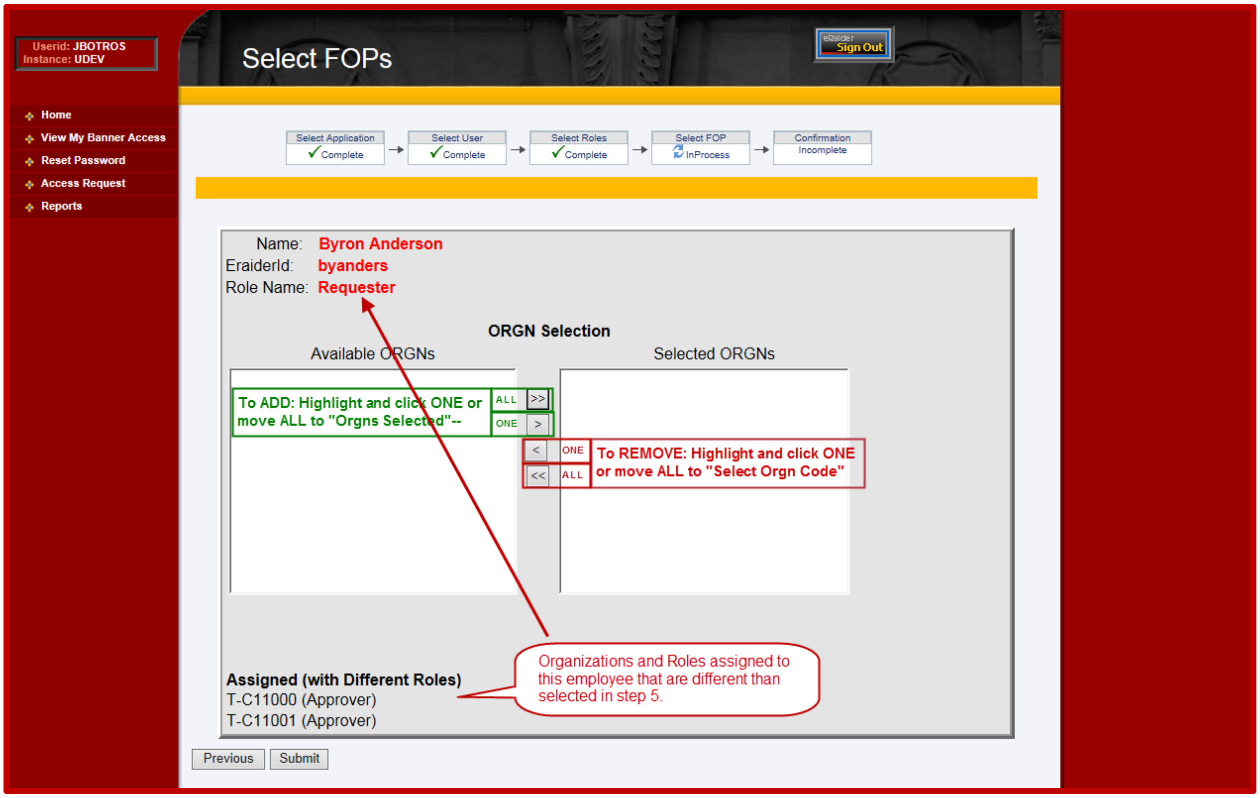
4. **On the Select User page, enter the employee's eRaider ID**



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



6. Add or Remove Organizations for this Role. When "None" is selected in step 5, all Organizations are automatically moved to "Available ORGNs". Click Submit.



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