Financial Access and Authority Management (FAAM) Service How-to Sheets

#10. Assigning or Changing Which Owner Receives Notifications

Assumptions/Prerequisites':

- Funding sources can have multiple Owners
- Only one Owner at a time can be an Approver
- Only the Owner with the Approver role receives requests in the Workflow and can approve/deny the request

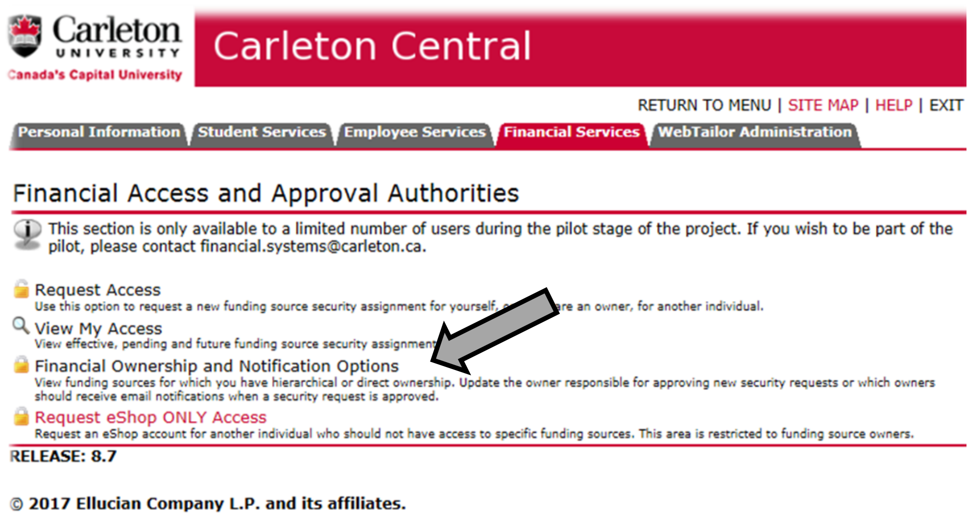
This how-to sheet outlines the steps required to:

- Assign or change which Owner has the Approver role

IMPORTANT NOTE: The Approver role should be delegated to another Owner during extended absences (e.g. vacation, conference)

STEPS

1 Once you have accessed FAAM, click on the 'Financial Ownership and Notification Options' link

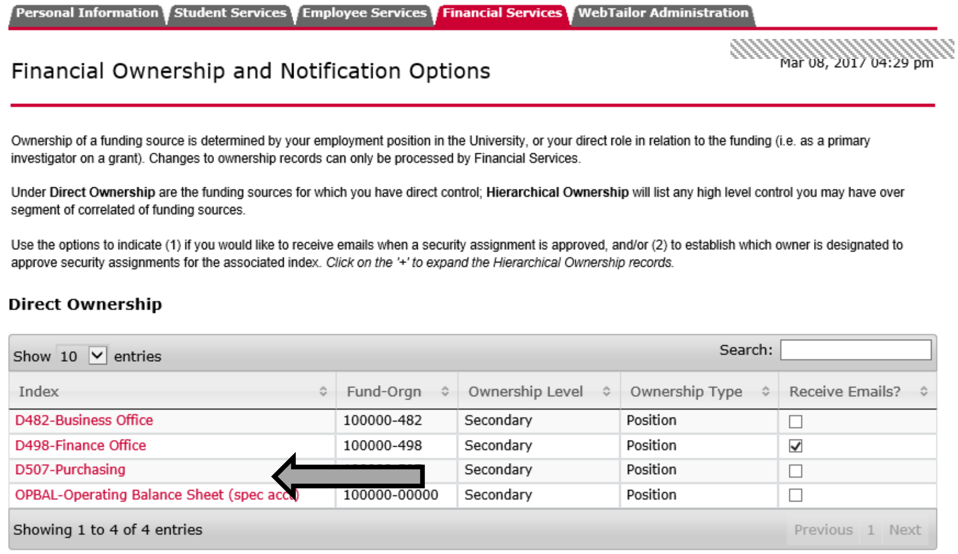


2 The list of funding sources for which you are an owner will be displayed. . The funding source is represented by a short code called an index.

How is the index short code determined?

- Departmental indexes are made up "D" + ORGN (e.g. D016 – French)
- Ancillary Indexes are made up "A"+ ORGN (e.g. A640 – Parking)
- Research and other internally restricted indexes are equal to the FUND (e.g. 555555)

Find the one you want to set an approver for and click on it.



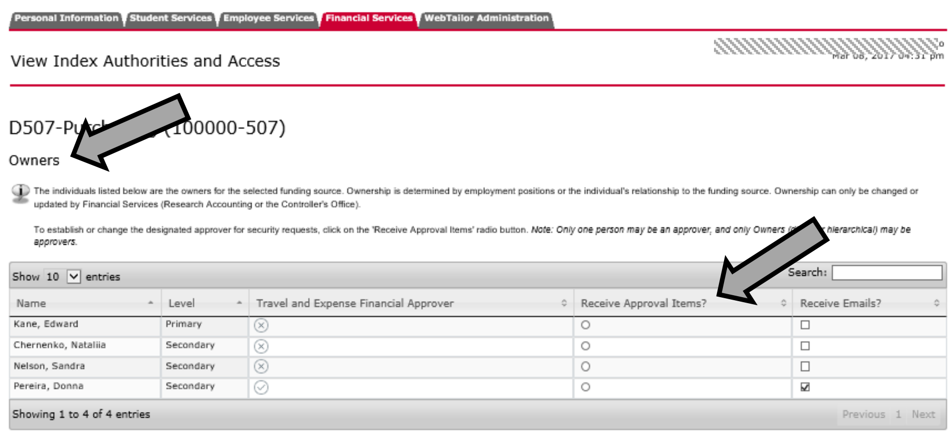
3 The detailed list of who has access to the selected index and their level of access will be displayed.

The first table lists Owners. Using this table, designate who will fill the Approver role.

To designate an Approver role, choose their respective 'Receive Approval Items?' radio button.

IMPORTANT NOTE: If you/they wish to receive email notifications, you must choose their respective 'Receive Emails?' radio button (recommended).

If not chosen, the only place where a designated owner will see requests is the Workflow List.



Tip: The funding source can have multiple owners. Which one should be designated the Approver role? Normally, the owner who takes care of the day-to-day transactions and is familiar with who should and who should not have access to the funding source would be the best choice.

Tip 2. The Owner designated the Approver role can be changed as needed. For example, when the Owner with the Approver role is on any type of leave.

Tip 3. Any Owner for the funding source has the ability to designate or change the Approver role.

Need help? Email financial.systems@carleton.ca, include your Carleton ID.