

# #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



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### Financial Access and Approval Authorities

This section is only available to a limited number of users during the pilot stage of the project. If you wish to be part of the pilot, please contact [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).

#### Request Access

Use this option to request a new funding source security assignment for yourself, or to assign an owner, for another individual.

#### View My Access

View effective, pending and future funding source security assignments.

#### Financial Ownership and Notification Options

View funding sources for which you have hierarchical or direct ownership. Update the owner responsible for approving new security requests or which owners should receive email notifications when a security request is approved.

#### Request eShop ONLY Access

Request an eShop account for another individual who should not have access to specific funding sources. This area is restricted to funding source owners.

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- 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.

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Financial Ownership and Notification Options Mar 08, 2017 04:29 pm

Ownership of a funding source is determined by your employment position in the University, or your direct role in relation to the funding (i.e. as a primary investigator on a grant). Changes to ownership records can only be processed by Financial Services.

Under **Direct Ownership** are the funding sources for which you have direct control; **Hierarchical Ownership** will list any high level control you may have over segment of correlated of funding sources.

Use the options to indicate (1) if you would like to receive emails when a security assignment is approved, and/or (2) to establish which owner is designated to approve security assignments for the associated index. *Click on the '+' to expand the Hierarchical Ownership records.*

**Direct Ownership**

Index	Fund-Orgn	Ownership Level	Ownership Type	Receive Emails?
D482-Business Office	100000-482	Secondary	Position	<input type="checkbox"/>
D498-Finance Office	100000-498	Secondary	Position	<input checked="" type="checkbox"/>
D507-Purchasing		Secondary	Position	<input type="checkbox"/>
OPBAL-Operating Balance Sheet (spec acc)	100000-00000	Secondary	Position	<input type="checkbox"/>

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- 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.

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View Index Authorities and Access Mar 08, 2017 04:31 pm

D507-Purchasing (100000-507)

The individuals listed below are the owners for the selected funding source. Ownership is determined by employment positions or the individual's relationship to the funding source. Ownership can only be changed or updated by Financial Services (Research Accounting or the Controller's Office).

To establish or change the designated approver for security requests, click on the 'Receive Approval Items' radio button. *Note: Only one person may be an approver, and only Owners (non-hierarchical) may be approvers.*

Name	Level	Travel and Expense Financial Approver	Receive Approval Items?	Receive Emails?
Kane, Edward	Primary	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Chernenko, Natalia	Secondary	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Nelson, Sandra	Secondary	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Pereira, Donna	Secondary	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

Showing 1 to 4 of 4 entries Previous 1 Next

**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](mailto:financial.systems@carleton.ca), include your Carleton ID.