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
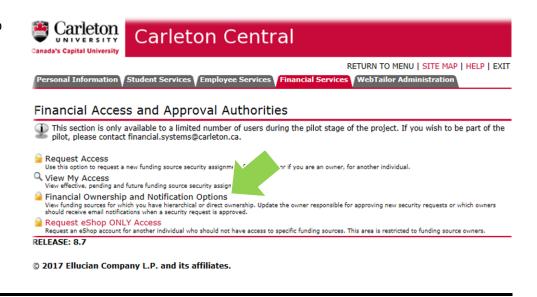
This how-to sheet outlines the steps required to:

- 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' text.

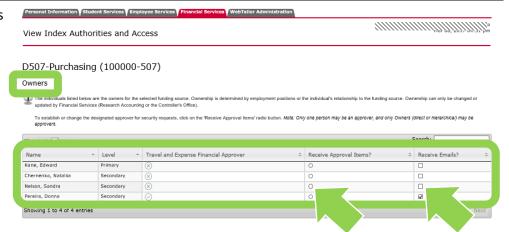| 2 | The list of funding sources for which you are an owner will be displayed. The funding source is represented by a short code called an index.

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

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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

Show 10 entries   Search:

Index	Fund-Orgn	Ownership Level	Ownership Type	Receive Emails?
D482-Business Office	00000-482	Secondary	Position	☐
D498-Finance Office	00000-498	Secondary	Position	☑
D507-Purchasing	00000-507	Secondary	Position	☐
OPBAL-Operating Balance Sheet (spec acct)	00000-00000	Secondary	Position	☐

Showing 1 to 4 of 4 entries   Previous 1 Next

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

The 'Name' column in the table lists Owners.

To designate an Approver role, click on the radio button in the 'Receive Approval Items?' column for the chosen owner.

IMPORTANT NOTE: If you/ they wish to receive email notifications, you must also click on the radio button in their respective 'Receive Emails?' column (recommended). If the 'Receive Emails' radio button is not chosen, designated owners will only see requests the Workflow List. | |

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View Index Authorities and Access

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D507-Purchasing (100000-507)

Owners

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 (direct or hierarchical) may be approvers.*

Search:

Name	Level	Travel and Expense Financial Approver	Receive Approval Items?	Receive Emails?
Kane, Edward	Primary	⊗	○	☐
Chernenko, Nataliia	Secondary	⊗	○	☐
Nelson, Sandra	Secondary	⊗	○	☐
Pereira, Donna	Secondary	⊘	○	☑

Showing 1 to 4 of 4 entries   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, include your Carleton ID.