

#11. Requesting Shopper Access for Someone Else in eShop

What is a Shopper Account in eShop?

- A user with a Shopper Account does not have access to an Index in eShop.
- Without access to an Index, users with a Shopper Account can log into eShop, browse the site, and add goods and/or forms to a cart. However, they are not able to submit a cart (i.e. check out). Instead, they must assign their cart to a user with a 'Requisitioner' role in eShop (i.e. a user who can submit/ check out a cart).

Who can request a Shopper Account in eShop?

- Only an Owner can request a Shopper Account.
- Once set up, the Shopper Account is only active for a year.

This how-to sheet outlines the steps required for:

- An Approver to request a Shopper Account in eShop for someone else.

STEPS

- 1 Once you have accessed FAAM, click on the 'Request eShop ONLY Access' link.



Carleton Central

[RETURN TO MENU](#) | [SITE MAP](#) | [HELP](#) | [EXIT](#)

[Personal Information](#) | [Student Services](#) | [Employee Services](#) | [Financial Services](#) | [WebTailor Administration](#)

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.

Request Access

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

View My Access

View effective, pending and future funding source security assignments.

Financial Ownership and Notification

View funding sources for which you have his or her 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.

RELEASE: 8.7

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- 2 Choose 'Someone Else' from the 'Who are you requesting access for?' field.

Enter a Carleton ID# for the user you are requesting a Shopper Account for. If you do not know the Carleton ID #, you can search for the user by clicking on the magnifying glass icon.



The expiry date will default to 3 months from the date of request. You can choose an expiry date of up to a year from the date of request.


Click on the 'Submit' button.

eShop ONLY Access Request

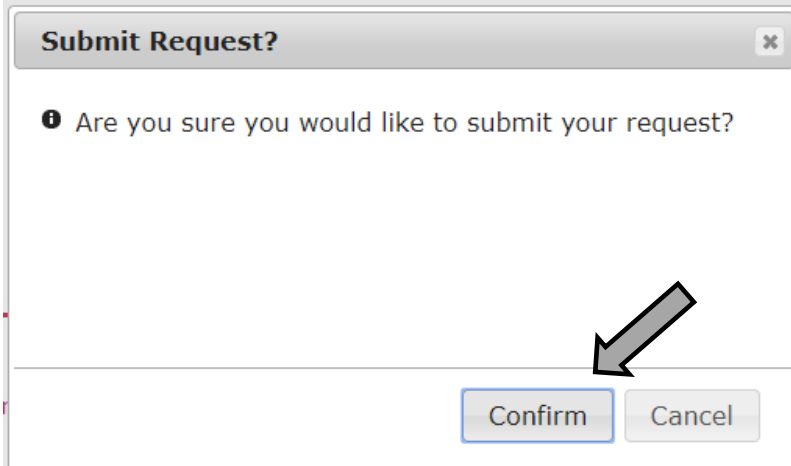
 As an Owner, you may request eShop ONLY access for someone you want to

Who are you requesting access for?*

Enter Carleton ID # of the individual: * 
 - Finance Office

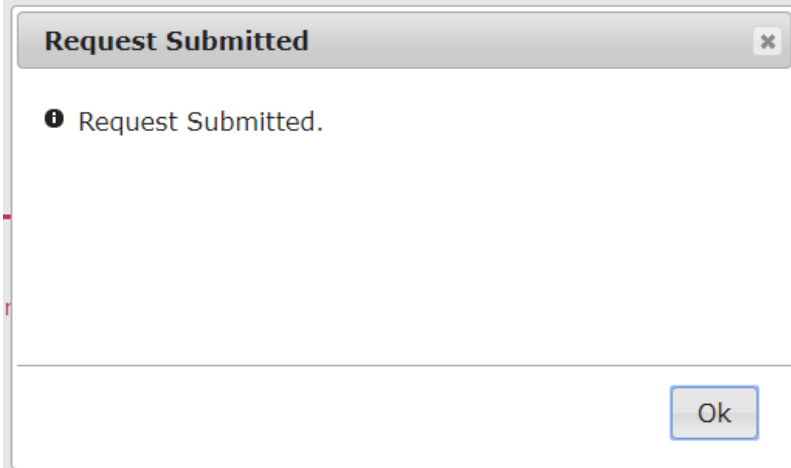
Expiry Date: * 

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- 3 In the 'Submit Request' window that appears, click on the 'Confirm' button.



The dialog box titled "Submit Request?" contains an information icon and the text "Are you sure you would like to submit your request?". At the bottom, there are two buttons: "Confirm" and "Cancel". A grey arrow points to the "Confirm" button.

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- 4 In the 'Request Submitted' window that appears, click 'OK'.



The dialog box titled "Request Submitted" contains an information icon and the text "Request Submitted.". At the bottom right, there is an "Ok" button.

What Next? The individual for whom you requested access for will receive an email notification regarding the request status.
