Removing My Own Access to a Funding Source

This how-to sheet outlines the steps required to:

- Remove your own access to a funding source (e.g. 100000-498-1300).

Why would you request that your access be removed?

- You no longer require access to the funding source (e.g. you have accepted a new position within the University).

IMPORTANT NOTE for OWNERS:

- OWNERS are defined as a position or individual with ultimate authority over the funding source and power to delegate financial approval authority.
- If you are an OWNER, changes to ownership must be requested through …
  - Financial Services (financial.services@carleton.ca) for operating and special purpose funding sources
  - Research Financial Services (accounting@carleton.ca) for research and internally restricted funding sources

If you are removing someone else's access to a funding source, refer to the 'Removing Someone Else's Access to a Funding Source' how-to sheet.

STEPS

1. Once you have accessed FAAM, click on the '**View My Access**' text.	

2. Find the funding source that you want to remove access to. The funding source is represented by a short code called an index.

How is the index short code determined?

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

Click on the trash can icon located at the end of the row.

View My Access

Feb 17, 2017 04:04

Effective Access

Security records in this section are effective as of today. You may expire an effective record as of midnight tonight by clicking on the garbage can.

Show 10 ⌄ entries   Sear

Index	Fund-Orgn	Primary Owner	Effective Date	Expiry Date	Financial Approval Authority	Travel and Expense Financial Approver	Access Type	eShop Access	eS... Appro...	Expir...
188420-Math Non-Credit Course	188420-175		2016-11-28		⊗	⊗	Posting	⊗	None	🗑
188888-FAAM - Training FASS (PER)	188888-265		2016-12-09		⊘	⊘	Posting and Query	⊘	Unlimited	
D166-Biology	100000-166		2017-02-16		⊘	⊗	Posting and Query	⊘	Unlimited	
D265-FED Office of the Dean	100000-265		2016-11-28		⊘	⊗	Posting and Query	⊘	Unlimited	🗑

Showing 1 to 4 of 4 entries   Previous 1 Ne

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3. A confirmation '**Warning**' window will appear.

   a. choose the date (i.e. current or future) that access will expire

   and

   b. click on the grey '**Confirm**' button

   To make an Owner or individual aware of changes in their access, a system generated notification will be sent to them via email.

Thomas, Laura	Secondary	⊘		○

Showing 1 to 4 of 4 entries

Financial Approval Authorities

The individuals listed below have been delegated full financial a[pr] garbage can' icon.

Show 10 ⌄ entries

Name	Effective Date	E[xp]

Showing 0 to 0 of 0 entries

Other Access

These individuals have limited access to the selected funding source. Review the column headers for more details.

Warning ✕

⚠ Warning: Are you sure you want to expire the [record]?
   Note: The record will be effective until midnight [on the] expiry date. Any subsequent requests for th[is ... mu]st be effective dated after the expiry date.

Expiry Date: 17/02/2017 📅

[Confirm] [Cancel]

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

What Next? A notification, generated by the system, will be sent to the Owner via email to make them aware of the changes.