

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

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.

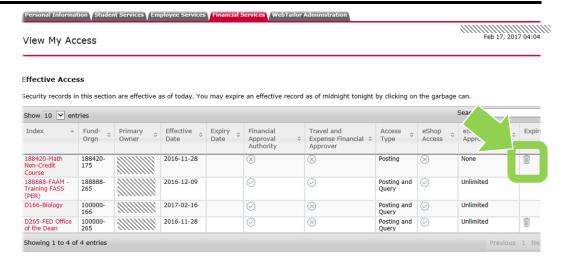


 Find the funding source that you want to remove access to. The funding source is represented by a short code called an index.

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.

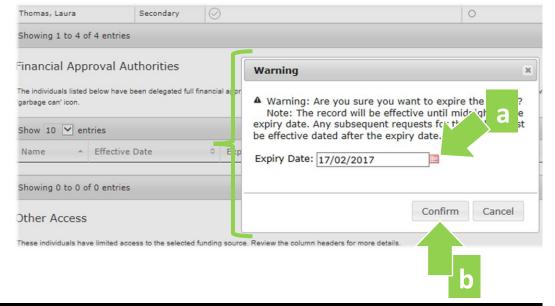


- A confirmation 'Warning' window will appear.
 - a. choose the date (i.e. current or future) that access will expire

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.



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.