

#7. Requesting Access to a Funding Source for Someone Else

This how-to sheet outlines the steps required to:

- Request access to a funding source (e.g. 100000-498-1300) for someone else (e.g. a student, a new hire).

Why would you request access?

- A few examples:
 - To submit travel claims in Travel and Expense
 - To submit requisitions in eShop
 - To view/submit journals in FAST
 - To view financial statements in FAST

IMPORTANT NOTE: If you are requesting financial approval access to a funding source for for someone else, refer to how-to-sheet #6.

STEPS

- 1 Once you have accessed FAAM, click on the 'Request Access' 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 financialservices@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 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.

RELEASE: 8.7

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- 2 Only funding source owners can grant access to other individuals.
- For 'Who are you requesting access for?' select 'Someone Else' from the drop down menu

and

enter the individual's Carleton ID in the 'Enter Carleton ID# of the Individual' field that appears OR click on the magnifying glass icon to search for an individual's ID number.

The screenshot shows the 'Request Access' form with the following fields and values:

- Who are you requesting access for?: **Someone Else** (selected from a dropdown menu)
- Enter Carleton ID # of the individual: * (empty field with a magnifying glass icon)
- Select the Index: * (empty field with a magnifying glass icon)
- Financial Approval Authority: * ☐ Yes ☒ No
- Travel and Expense Financial Approver: * ☐ Yes ☒ No *Only owners may request changes to Travel and Expense Approver.
- Access Type: * **Posting and Query** (selected from a dropdown menu)
- eShop Access: * ☐ Yes ☒ No
- Effective Date: * (empty date field)
- Expiry Date: (empty date field)

Buttons at the bottom: Save, Submit, Submit & Add Another.

- 3 Select the funding source to which you are requesting access for the individual. 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)

There are two ways to 'Select the Index'. You can either type an index directly into the field (i.e. D498 in this example) OR you can click on the magnifying glass (and then the 'Search' button in the window that opens) to see a complete list of indexes.

The screenshot shows the 'Request Access' form with the following fields and values:

- Who are you requesting access for?: **Someone Else** (selected from a dropdown menu)
- Enter Carleton ID # of the individual: * (empty field with a magnifying glass icon)
- Select the Index: * **188888** (typed into the field)
- Financial Approval Authority: * ☐ Yes ☒ No
- Travel and Expense Financial Approver: * ☐ Yes ☒ No
- Access Type: * **Posting and Query** (selected from a dropdown menu)
- eShop Access: * ☐ Yes ☒ No
- Effective Date: * (empty date field)
- Expiry Date: (empty date field)

Buttons at the bottom: Save, Submit, Submit & Add Another.

- 4 For 'Financial Approval Authority' leave the defaulted 'No',
and
ignore the 'Travel and Expense Financial Approver' option.

- 5 For 'Access Type', you will choose from the following options:

Choosing 'Posting':

- To submit travel claims in T&E, choose 'Posting'¹
- To submit requisitions in eShop, choose 'Posting' and 'Yes' to 'eShop access'.
- To submit journals in FAST, choose 'Posting'².

Choosing 'Query':

- To only view financial statements in FAST, choose 'Query'.

Choosing 'Posting and Query'

- To do everything listed above, choose 'Posting and Query' plus 'Yes' for eShop.

¹ You should have an active account in Travel and Expenses System. If you do not have one, submit an Account Request Form. This form can be found: <https://carleton.ca/travel/account-requests/>.

² Please note, in addition to access to an index, you also need access to FAST Journal Vouchers application. . Contact financial.services@carleton.ca for more information.

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- If you chose 'Yes' to 'eShop Access' in step 4, then you must
 - decide whether an "eShop Implicit Approval Limit" is required and its threshold (i.e. a money limit)

Implicit Approval:

A form of delegation of financial approval authority up to an approved money limit.

This means that an eShop shopping cart with a value below the approved money limit is considered pre-approved and automatically routes to the next step in the eShop workflow (i.e. the approver will not see it).

If an eShop shopping cart has a value above the approved money limit, it will be routed to approvers.

- Choose an 'Effective Date' based on when access is required. If applicable, also choose an 'Expiry Date'.

- 7 When the request is complete, click the 'Submit' button.

Submit

- 8 **NOTE!** A 'Terms and Conditions' window with a 'Delegation of Authority Agreement' will pop up ONLY if you selected 'Yes' for 'eShop Implicit Approval Limit'.

- Read the 'Terms and Conditions' window that opens up.

Note: It is important that you understand what level of responsibility you are delegating to the individual. You can refer to the [Approval and Delegation of Authority Policy](#) to find out who can act as a financial approver.

If you are a researcher, contact your fund administrator with

any questions. If you are not a researcher, email questions to financial.services@carleton.ca.

b. Click on the 'I Agree' button.

What Next? FAAM will route your request to the funding source owner for review and approval. You will receive an email notification with further details once the request has been approved or declined.
