FINANCIAL ADMINISTRATION COMMUNITY TRAINING & SOLUTIONS

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

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 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 the 'Requesting Financial Approval Access for someone else' how-to-sheet.

STEPS

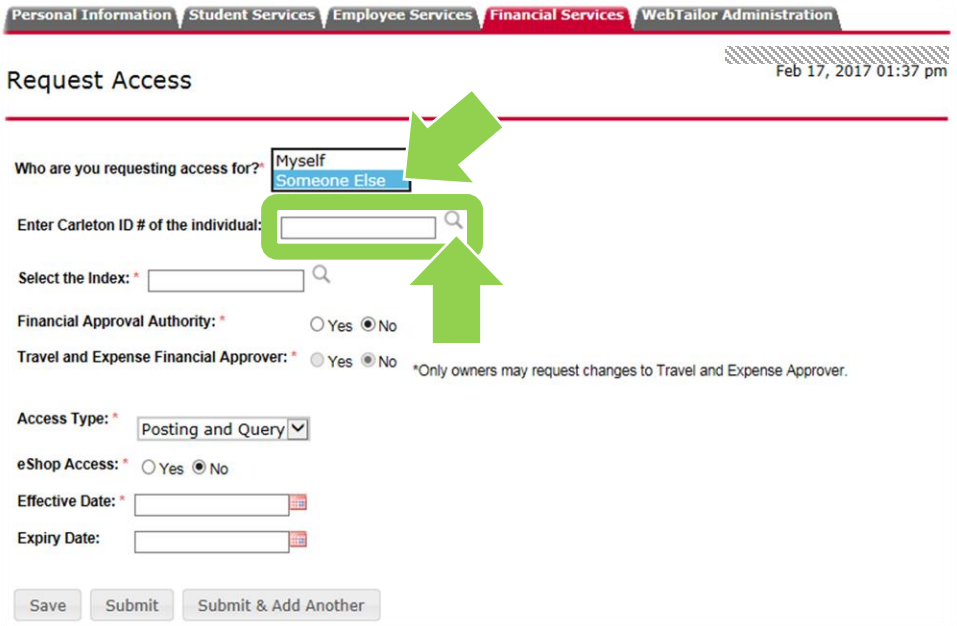
1 Once you have accessed FAAM, click on the 'Request Access' link.

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 Carleton ID number.

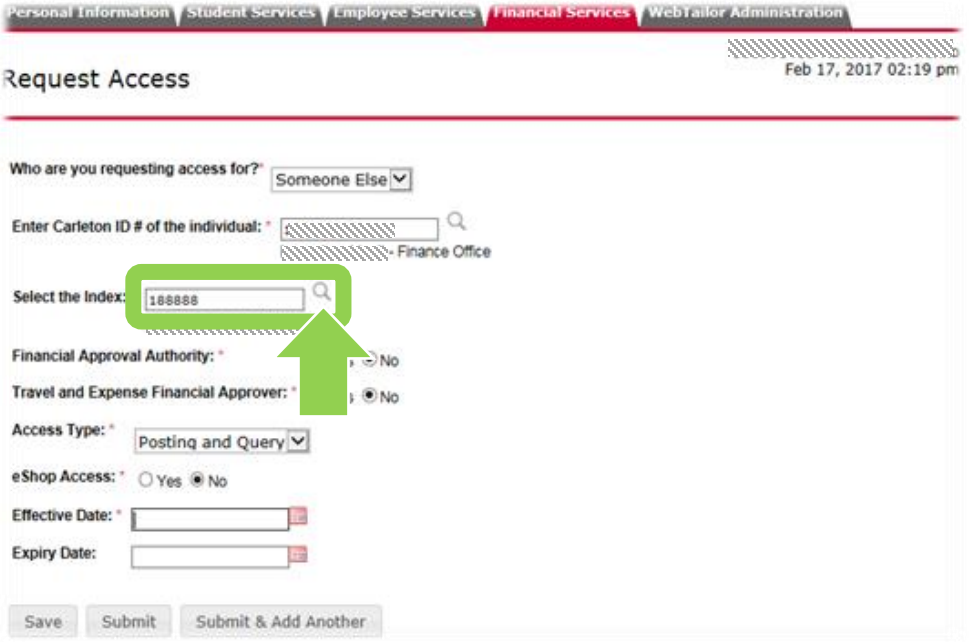


3 Select the funding source you are requesting access to for the individual. The funding source is represented by a short code called an index.

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)

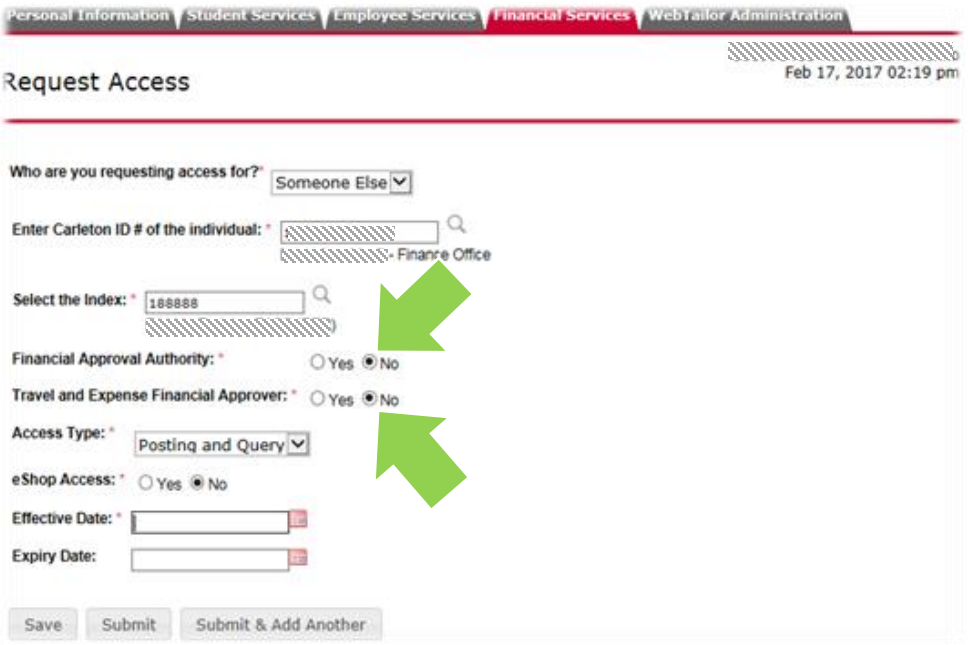
There are two ways to 'Select the Index'. You can either type an index directly into the field (i.e. 188888 in this example) OR you can click on the magnifying glass (and then the 'Search' button in the window that opens) to see a complete list of indexes.



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 requisitions in eShop, choose ‘Posting’ and ‘Yes’ to ‘eShop access’.
- To submit journals in FAST, choose ‘Posting’.

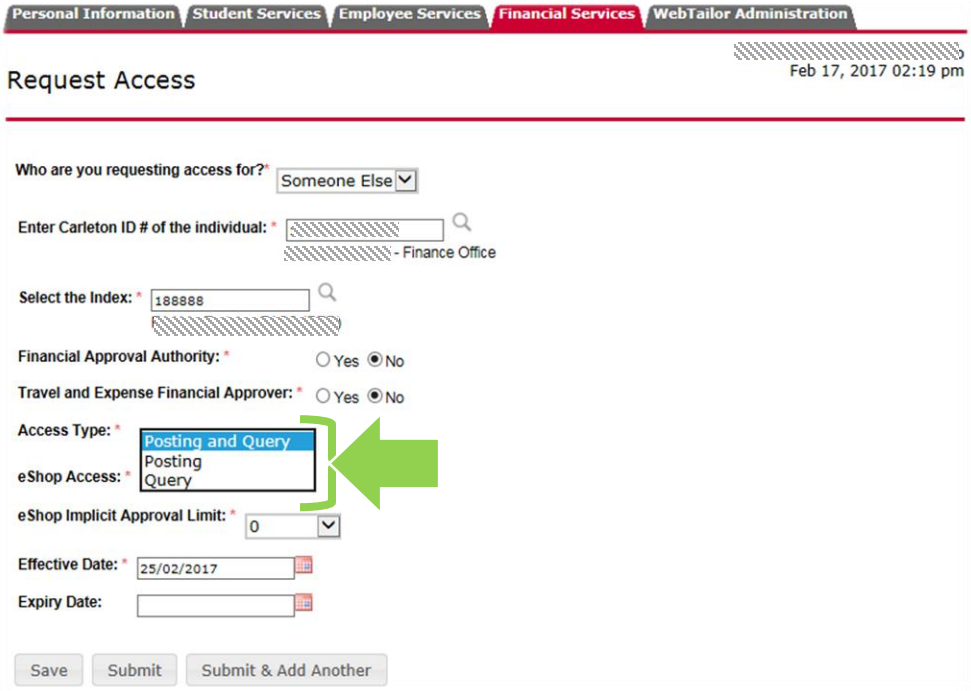
Choosing ‘Query’:

- 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.

*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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a. If require ‘eShop Access’, then you must click the radio button beside ‘Yes’, and

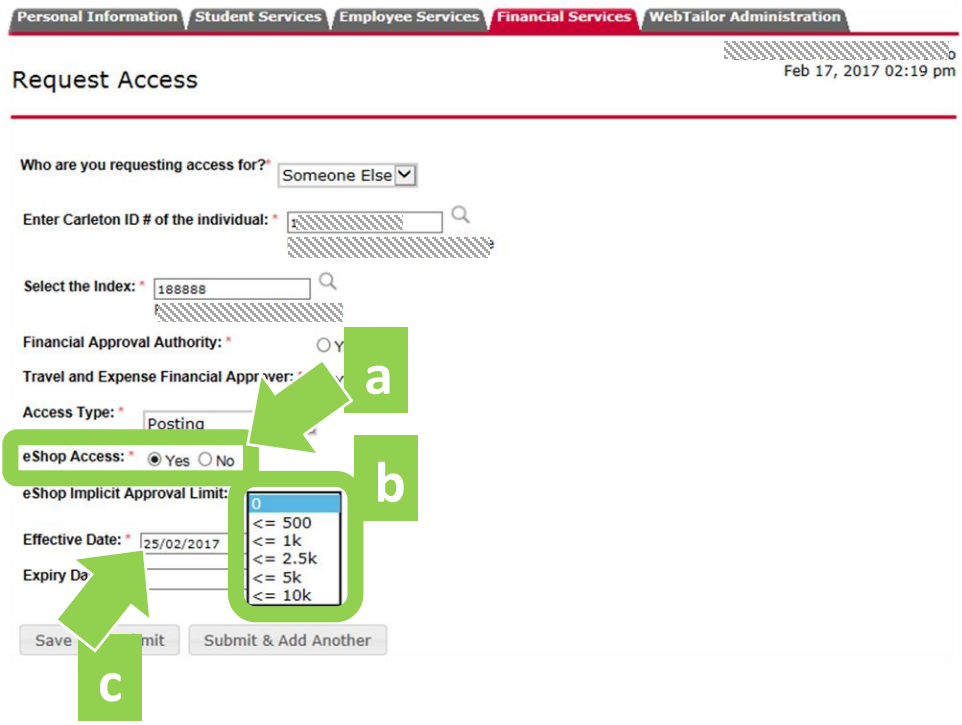
b. If you chose ‘Yes’, decide whether an “eShop Implicit Approval Limit” is required and its threshold (i.e. a money limit)

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

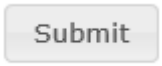
This means that an eShop shopping cart with a value below the approved money limit is considered pre-approved and automatically routes to the next step in the eShop workflow (i.e. the approver will not see it).

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

c. 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 grey ‘Submit’ button.



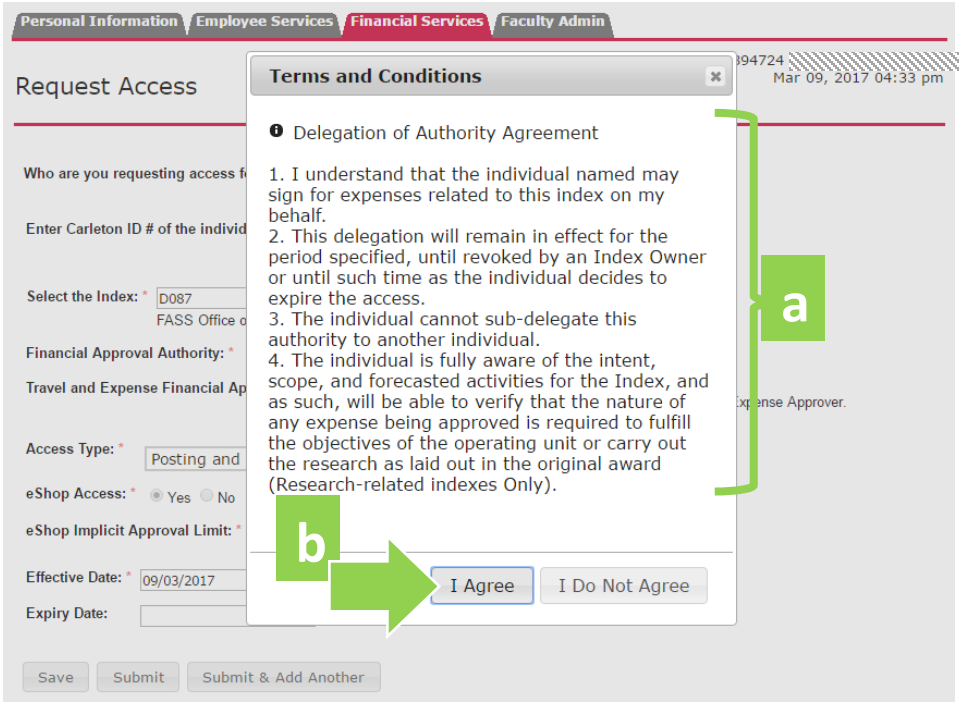
8 **NOTE!** A 'Terms and Conditions' window with a **'**Delegation of Authority Agreement' will pop up ONLY if you selected 'Yes' for 'eShop Implicit Approval Limit'.

a. 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 financial officer 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 rout 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.