

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.




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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 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 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 Carleton ID number.

Personal Information Student Services Employee Services **Financial Services** WebTailor Administration

Feb 17, 2017 01:37 pm

Request Access

Who are you requesting access for?

Enter Carleton ID # of the individual:

Select the Index: *

Financial Approval Authority: * Yes No

Travel and Expense Financial Approver: * Yes No *Only owners may request changes to Travel and Expense Approver.

Access Type: *

eShop Access: * Yes No

Effective Date: *

Expiry Date:

- 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.

Personal Information Student Services Employee Services **Financial Services** WebTailor Administration

Feb 17, 2017 02:19 pm

Request Access

Who are you requesting access for?

Enter Carleton ID # of the individual: *

Select the Index:

Financial Approval Authority: * Yes No

Travel and Expense Financial Approver: * Yes No

Access Type: *

eShop Access: * Yes No

Effective Date: *

Expiry Date:

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

Personal Information Student Services Employee Services **Financial Services** WebTailor Administration

Request Access Feb 17, 2017 02:19 pm

Who are you requesting access for?

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

Select the Index: *

Financial Approval Authority: * Yes No

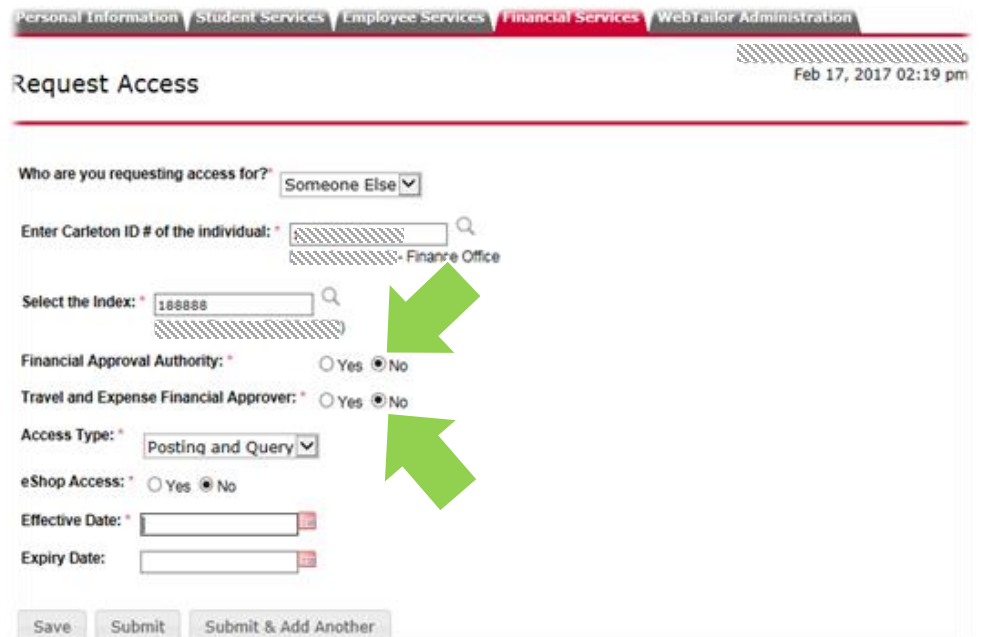
Travel and Expense Financial Approver: * Yes No

Access Type: *

eShop Access: * Yes No

Effective Date: *

Expiry Date:



- 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.

Personal Information Student Services Employee Services **Financial Services** WebTailor Administration

Request Access Feb 17, 2017 02:19 pm

Who are you requesting access for?

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

Select the Index: *

Financial Approval Authority: * Yes No

Travel and Expense Financial Approver: * Yes No

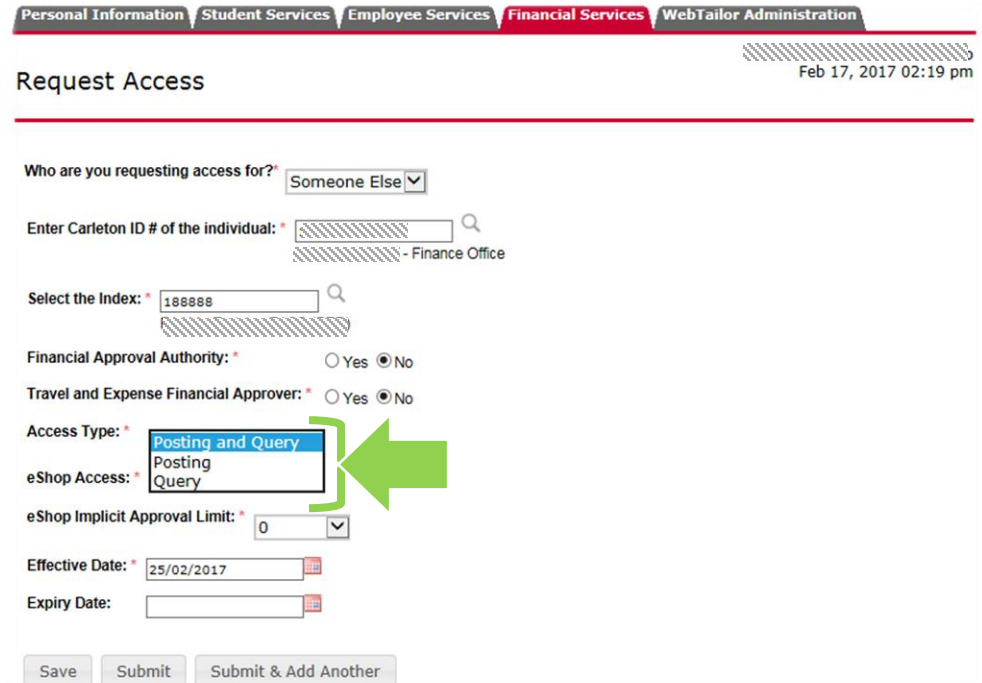
Access Type: *

eShop Access: * Yes No

eShop Implicit Approval Limit: *

Effective Date: *

Expiry Date:



- 6
 - 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'.

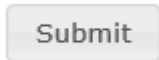
The screenshot shows the 'Request Access' form with the following fields and callouts:

- Who are you requesting access for?:** Someone Else (dropdown)
- Enter Carleton ID # of the individual: *** (text input)
- Select the Index: *** 188888 (text input)
- Financial Approval Authority: *** (radio buttons)
- Travel and Expense Financial Approver: *** (text input)
- Access Type: *** Posting (dropdown)
- eShop Access: *** Yes (selected radio button) / No (radio button)
- eShop Implicit Approval Limit:** 0 (dropdown menu with options: <= 500, <= 1k, <= 2.5k, <= 5k, <= 10k)
- Effective Date: *** 25/02/2017 (text input)
- Expiry Date:** (text input)
- Buttons:** Save, Submit, Submit & Add Another

Callouts:

- a:** Points to the 'Travel and Expense Financial Approver' field.
- b:** Points to the 'eShop Implicit Approval Limit' dropdown menu.
- c:** Points to the 'Submit' button.

- 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.

The screenshot shows a web application interface with a 'Request Access' form and a 'Terms and Conditions' pop-up window. The form includes fields for 'Who are you requesting access for', 'Enter Carleton ID # of the individual', 'Select the Index' (D087), 'Financial Approval Authority', 'Travel and Expense Financial Approval Authority', 'Access Type' (Posting and), 'eShop Access' (Yes), 'eShop Implicit Approval Limit' (Yes), 'Effective Date' (09/03/2017), and 'Expiry Date'. The 'Terms and Conditions' window contains the following text:

Delegation of Authority Agreement

1. I understand that the individual named may sign for expenses related to this index on my behalf.
2. This delegation will remain in effect for the period specified, until revoked by an Index Owner or until such time as the individual decides to expire the access.
3. The individual cannot sub-delegate this authority to another individual.
4. The individual is fully aware of the intent, scope, and forecasted activities for the Index, and as such, will be able to verify that the nature of any expense being approved is required to fulfill the objectives of the operating unit or carry out the research as laid out in the original award (Research-related indexes Only).

At the bottom of the pop-up are two buttons: 'I Agree' and 'I Do Not Agree'. A green arrow labeled 'b' points to the 'I Agree' button. A green bracket labeled 'a' encompasses the terms and conditions text.

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.