

#8. Removing Someone Else's Access to a Funding Source

This how-to sheet outlines the steps required to:

- Remove someone else's access to a funding source (e.g. 100000-498-1300).

Why would you remove request access?

- You no longer want an individual to have access to a funding source that you have ownership of.

IMPORTANT NOTE regarding WHO can remove access to a funding source:

- OWNERS can remove someone else's access to a funding source, or
- The individual to whom access was granted can remove it when no longer needed.

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 removing your own access to a funding source, refer to how-to-sheet #4.

STEPS

- 1 Once you have accessed FAAM, click on the 'Financial Ownership and Notification Options' 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. 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

- Select the funding source to which you are removing access. 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)

Choose the index from the list under the 'Direct Ownership' header.

- You will see a list of every individual who has access to the index, organized by levels of access (i.e. Owners, Financial Approval Authorities, or Other)

Find the individual and click on trash can icon  located at the end of the row.

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Financial Ownership and Notification Options

Ownership of a funding source is determined by your employment position in the University, or your direct role in relation to the funding (i.e. as a primary investigator on a grant). Changes to ownership records can only be processed by Financial Services.

Under **Direct Ownership** are the funding sources for which you have direct control; **Hierarchical Ownership** will list any high level control you may have over segment of correlated of funding sources.

Use the options to indicate (1) if you would like to receive emails when a security assignment is approved, and/or (2) to establish which owner is designated to approve security assignments for the associated index. Click on the '+' to expand the Hierarchical Ownership records.

Direct Ownership

Show 10 entries Search:

Index	Fund-Orgn	Ownership Level	Ownership Type	Receive Emails?
188888-FAAM - Training FASS (PER)		Primary	User	<input type="checkbox"/>
		Secondary	Position	<input type="checkbox"/>

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View Index Authorities and Access

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D166-Biology (100000-166)

Owners

The individuals listed below are the owners for the selected funding source. Ownership is determined by employment positions or the individual's relationship to the funding source. Ownership can only be changed or updated by Financial Services (Research Accounting or the Controller's Office).

To establish or change the designated approver for security requests, click on the 'Receive Approval Items' radio button. Note: Only one person may be an approver, and only Owners (direct or hierarchical) may be approvers.

Show 10 entries Search:

Name	Level	Travel and Expense Financial Approver	Receive Approval Items?	Receive Emails?
	Primary	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
	Secondary	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
	Secondary	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
	Secondary	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

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Financial Approval Authorities

The individuals listed below have been delegated full financial approval authority on the selected funding source (a.k.a. signing authority). To add a new individual, click on Request Access. To expire a record, click on the 'garbage can' icon.

Show 10 entries Search:

Name	Effective Date	Expiry Date	Travel and Expense Financial Approver	Status
No data available in table				

Showing 0 to 0 of 0 entries Previous Next

Other Access

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

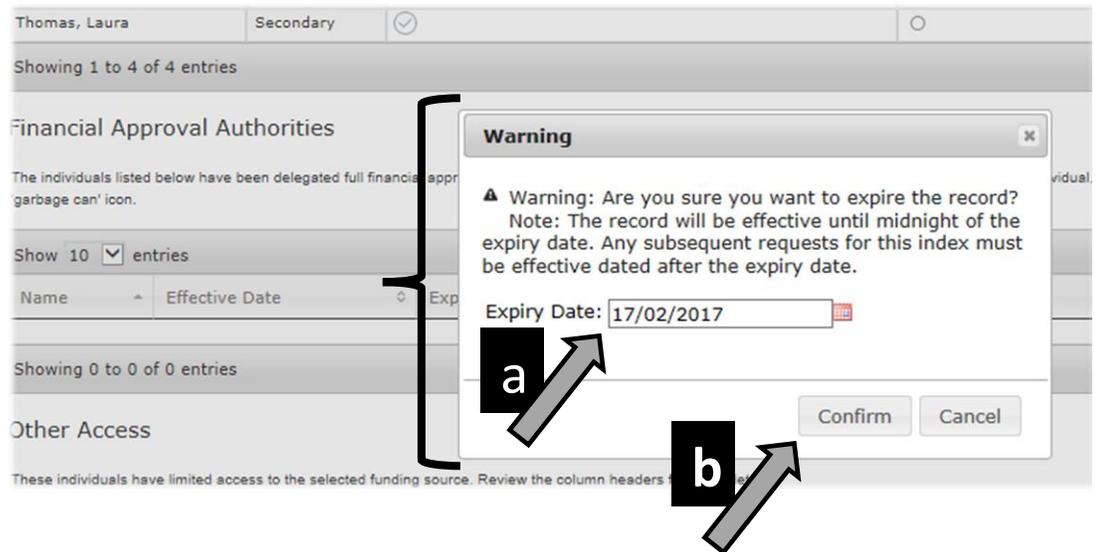
Show 10 entries Search:

Name	Effective Date	Expiry Date	Access Type	eShop Access	eShop Implicit Approval Limit	Status
	2015-09-23		Posting	<input checked="" type="checkbox"/>	None	Current 
	2015-09-23		Posting	<input checked="" type="checkbox"/>	None	Current 
	2016-08-29		Posting	<input checked="" type="checkbox"/>	None	Current 
	2015-09-23		Posting	<input checked="" type="checkbox"/>	None	Current 

A confirmation warning window will appear.

- a. Choose the date (i.e. current or future) that access will expire.
- b. Click on the 'Confirm' button.

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