

Carleton's Financial Information Systems: Quick Reference for Administrative Staff

We're here to support you! Reach out by email, book a virtual office hour, or visit carleton.ca/facts for instructions on completing financial administrative tasks (e.g. expense reimbursement, procuring goods and services) and navigating policy frameworks.

Last updated March 5, 2024

eShop

- **Purpose.** Purchasing goods and services online using Funds managed by Carleton (e.g. purchasing office supplies, catering orders)
- **Access.** central.carleton.ca (Financial Access and Authority Management (FAAM) tool)
- **Logging in.** eshop.carleton.ca
- **Tools, support & training.** carleton.ca/facts/eshop
- **Questions.** email eshop@carleton.ca
- **Book a virtual office hour.**
outlook.office365.com/owa/calendar/CarletonUniversity6@cmail.carleton.ca/bookings

FAST Budget Adjustment and Forecasting (BAR)

- **Purpose.** Updating base and/or fiscal budgets through adjustments (**You cannot adjust actual transactions with this application, see instead the FAST Journal Voucher application*)
- **Access.** email tina.dinardo@carleton.ca
- **Logging in.** carleton.ca/fast
- **Tools, support & training.** carleton.ca/facts/fast-tools-support-training
- **Questions.** email tina.dinardo@carleton.ca
- **Book a virtual office hour.**
outlook.office365.com/owa/calendar/CarletonUniversity6@cmail.carleton.ca/bookings

You'd rather click on a hyperlink than type it in? Bookmark this information online at carleton.ca/facts/quick-reference-sheets/administrative/

FAST Finance Reporting

- **Purpose.** Providing financial reporting views to all Funds, orgs/depts., and accounts a user has authority to, including drilling down to detailed transactions or budget adjustments
- **Access.** Automatically granted when you have query access to a Fund
- **Logging in.** carleton.ca/fast
- **Tools, support & training.** carleton.ca/facts/fast-tools-support-training
- **Questions.** email financial.systems@carleton.ca
- **Book a virtual office hour.**
outlook.office365.com/owa/calendar/CarletonUniversity6@cmail.carleton.ca/bookings

FAST Journal Voucher

- **Purpose.** Reallocating existing transactions to another account (**You cannot adjust your budget with this application, see instead the FAST Budget Adjustment and Forecasting application*)
- **Access.** email tina.dinardo@carleton.ca
- **Logging in.** carleton.ca/fast
- **Tools, support & training.** carleton.ca/facts/fast-tools-support-training
- **Questions.** email tina.dinardo@carleton.ca
- **Book a virtual office hour.**
outlook.office365.com/owa/calendar/CarletonUniversity6@cmail.carleton.ca/bookings

FAST Procurement Card (Pcard)

- **Purpose.** The University administers several different purchasing card programs to acquire goods and services (i.e. Pcard, eCard, and corporate travel cards). The FAST Pcard application is used to reconcile Pcard and eCard transactions each month.
- **Access.** email procurementservices@carleton.ca
- **Logging in.** carleton.ca/fast
- **Tools, support & training.** carleton.ca/facts/fast-tools-support-training/pcard
- **Questions.** email procurementservices@carleton.ca

Financial Access and Authority Management (FAAM) Tool

- **Purpose.** Requesting and granting access to the operating budget or other funding sources, such as a research or special purpose Fund
- **Access.** automatically granted
- **Logging in.** central.carleton.ca
- **Tools, support & training.** carleton.ca/facts/faam
- **Questions.** email financial.systems@carleton.ca

MyResearch (also called FAST Research Administration)

- **Purpose.** Accessing information about research grants, contracts, enterprise Funds and Professional Expense Reimbursement (PER), including current balances
- **Access.** Automatically granted
- **Logging in.** carleton.ca/fast
- **Tools, support & training.** carleton.ca/facts/fast-tools-support-training/myresearch
- **Questions.** email financial.systems@carleton.ca
- **Book a virtual office hour.**
outlook.office365.com/owa/calendar/CarletonUniversity6@cmail.carleton.ca/bookings

SAP Concur Travel and Expense Reimbursement System

- **Purpose.** Submitting reimbursement requests for eligible work-related expenses that you have paid out of pocket and requesting travel advances
- **Access.** [Visit the Financial Information Systems portal in JIRA](#)
- **Logging in.** carleton.ca/concur
- **Tools, support & training.** carleton.ca/facts/travel
- **Questions.** email financial.systems@carleton.ca
- **Book a virtual office hour.**
outlook.office365.com/owa/calendar/CarletonUniversity6@cmail.carleton.ca/bookings

Other Non-System Financial Services Resources

Business Operations

- We provide financial services and advice to the University community with respect to the processing of financial transactions, including guidance related to Financial Services' policies, taxation requirements, cash-handing processes, and we can do your invoicing
- **Resources.** carleton.ca/financialservices/business-operations
- **Questions related to outgoing payments.** email accounts.payable@carleton.ca
- **Questions related to incoming payments.** email receipt.accounting@carleton.ca

Controller's Office

- We are the key contact for the University community with respect to understanding the operating budget, accounts, and donor-related Funds
- **Resources.** carleton.ca/financialservices/controllers-office
- **Questions.** email financial.services@carleton.ca

Procurement Services

- Our team oversees the university's procurement of goods and services through **competitive, open, fair, and transparent** processes and ensures compliance with university policies and public sector legislative requirements. We strive to provide best value to our clients across the campus community while facilitating acquisitions in a professional, ethical, and efficient manner.
- **Resources.** carleton.ca/procurement/how-to-buy
- **Questions.** ProcurementServices@carleton.ca

Research Financial Services

- We provide financial services and advice to the University community with respect to sponsored and internally restricted research, entrepreneurial activities, professional service grants and contracts, and professional expense reimbursements.
- **Resources.** carleton.ca/financialservices/research-accounting
- **Questions.** Email accounting@carleton.ca

Financial Services Organizational Chart



The online version of this quick reference sheet contains hyperlinks to webpages for each unit. Bookmark this information online at carleton.ca/facts/quick-reference-sheets/administrative/