

# Financial Access and Authority Management (FAAM) Tool 101

2022

# What is FAAM?

Financial Access and Authority Management (FAAM) is a multipurpose online service to:

- request access to a funding source
- grant access to a funding source
- remove access to a funding source
- delegate financial approval authority
- view what access you have to a funding source

## Who can request/ grant access to a funding source?

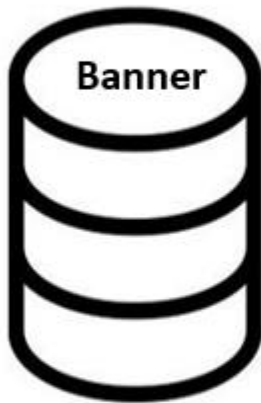
### Funding Source Owners can GRANT access to a funding source

- Ownership of a funding source is tied to a position or an individual with ultimate authority over the funding source.
- Owners have the power to delegate financial approval authority to an appropriate individual (**may not be further delegated**). Read the 'Approval and Delegation of Authority' policy to determine who can act as a delegate.

Individuals can REQUEST access to funding sources.

## FAAM can be Used to Request Access to the Following Financial Systems/ Applications

Financial Access and Authority Management (FAAM) tool



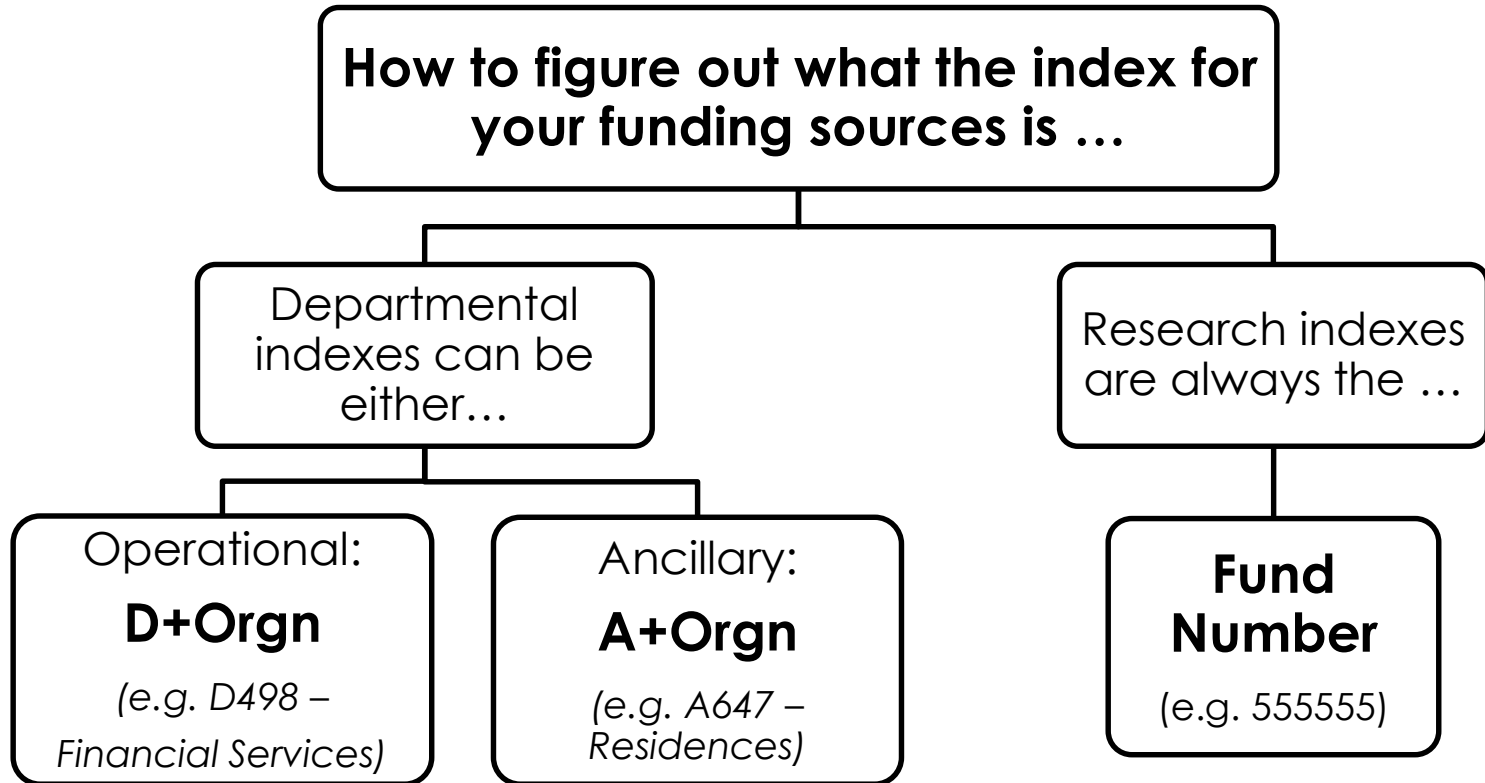
**NOTE:**

FAAM can only be used to request access to the Finance Reporting FAST application.

Email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca) to request access to the 'Budget Adjustment and Forecasting' and 'Journal Voucher' applications.

# It Begins with an Index

**Index:** A short code for the following elements of the FOAPAL accounting string: **F**und, **O**rganization, **P**rogram



# Making Sense of 'Request Access'

## Types of Access

Level of Authority on Index System	Query (user can ...)	Posting (user can ...)	Both (user can ...)	Implicit approval limit	Financial Approval Authority
<b>FAST / Banner</b>	View Statements	Initiate transaction	View + Initiate	N/A	View + Initiate
<b>FAST Pcard <u>/eCard</u></b>	N/A	Reconcile	View + Reconcile	N/A	View + Reconcile
<b>eShop</b>	N/A	Submit cart for further financial approval	Submit cart for further financial approval	Submit cart. Will not require further financial approval up to chosen implicit approval limit (e.g. no approval required up to \$500)	Submit cart. No other approval required

# Example: Requesting Access to eShop

Level of Authority on Index System	Query (user can ...)	Posting (user can ...)	Both (user can ...)	Implicit approval limit	Financial Approval Authority
FAST / Banner	View Statements	Initiate transaction	View + Initiate	N/A	View + Initiate
FAST Pcard /eCard	N/A	Reconcile	View + Reconcile	N/A	View + Reconcile
eShop		Submit cart for further financial approval	Submit cart for further financial approval	Submit cart. Will not require further financial approval up to chosen implicit approval limit (e.g. no approval required up to \$500)	Submit cart. No other approval required

Question: Why has 'Posting' been chosen for 'Access Type'?

### Request Access

Who are you requesting access for?\*

Select the Index: \*    
Purchasing

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:

# Example: Requesting Access to FAST Finance Classic

Level of Authority on Index System	Query (user can ...)	Posting (user can ...)	Both (user can ...)	Implicit approval limit	Financial Approval Authority
<b>FAST / Banner</b>	View Statements	Initiate transaction	View + Initiate	N/A	View + Initiate
<b>FAST Pcard /eCard</b>	N/A	Reconcile	View + Reconcile	N/A	View + Reconcile
<b>eShop</b>	N/A	Submit cart for further financial approval	Submit cart for further financial approval	Submit cart. Will not require further financial approval up to chosen implicit approval limit (e.g. no approval required up to \$500)	Submit cart. No other approval required

Question: Why has 'Query' been chosen for 'Access Type'?

### Request Access

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Who are you requesting access for?\* Myself v

Select the Index: \* D507 🔍  
Purchasing

Financial Approval Authority: \*  Yes  No

Travel and Expense Financial Approver: \*  Yes  No

Access Type: \* Query v

eShop Access: \*  Yes  No

Effective Date: \* 20/09/2017 📅

Expiry Date:  📅

Save
Submit
Submit & Add Another



# Example: Expiry Dates

Level of Authority on Index System	Query (user can ...)	Posting (user can ...)	Both (user can ...)	Implicit approval limit	Financial Approval Authority
<b>FAST / Banner</b>	View Statements	Initiate transaction	View + Initiate	N/A	View + Initiate
<b>FAST Pcard /eCard</b>	N/A	Reconcile	View + Reconcile	N/A	View + Reconcile
<b>eShop</b>	N/A	Submit cart for further financial approval	Submit cart for further financial approval	Submit cart. Will not require further financial approval up to chosen implicit approval limit (e.g. no approval required up to \$500)	Submit cart. No other approval required

Question: Why would I add an expiry date?

Keep in Mind: Students ALWAYS have an expiry date

### Request Access

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Who are you requesting access for?

Select the Index: \*    
Purchasing

Financial Approval Authority: \*  Yes  No

Travel and Expense Financial Approver: \*  Yes  No

Access Type: \*

eShop Access: \*  Yes  No

Effective Date: \*

Expiry Date:

# Example: Financial Approval Authority

Level of Authority on Index System	Query (user can ...)	Posting (user can ...)	Both (user can ...)	Implicit approval limit	Financial Approval Authority
<b>FAST / Banner</b>	View Statements	Initiate transaction	View + Initiate	N/A	View + Initiate
<b>FAST Pcard /eCard</b>	N/A	Reconcile	View + Reconcile	N/A	View + Reconcile
<b>eShop</b>	N/A	Submit cart for further financial approval	Submit cart for further financial approval	Submit cart. Will not require further financial approval up to chosen implicit approval limit (e.g. no approval required up to \$500)	Submit cart. No other approval required

**Question: What does it mean if an owner wants to delegate financial approval authority to me?**

### Request Access

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Who are you requesting access for?

Select the Index: \*   
Purchasing

Financial Approval Authority: \*  Yes  No

Travel and Expense Financial Approver: \*  Yes  No

Access Type: \*

eShop Access: \*  Yes  No

eShop Implicit Approval Limit: \*

Effective Date: \*

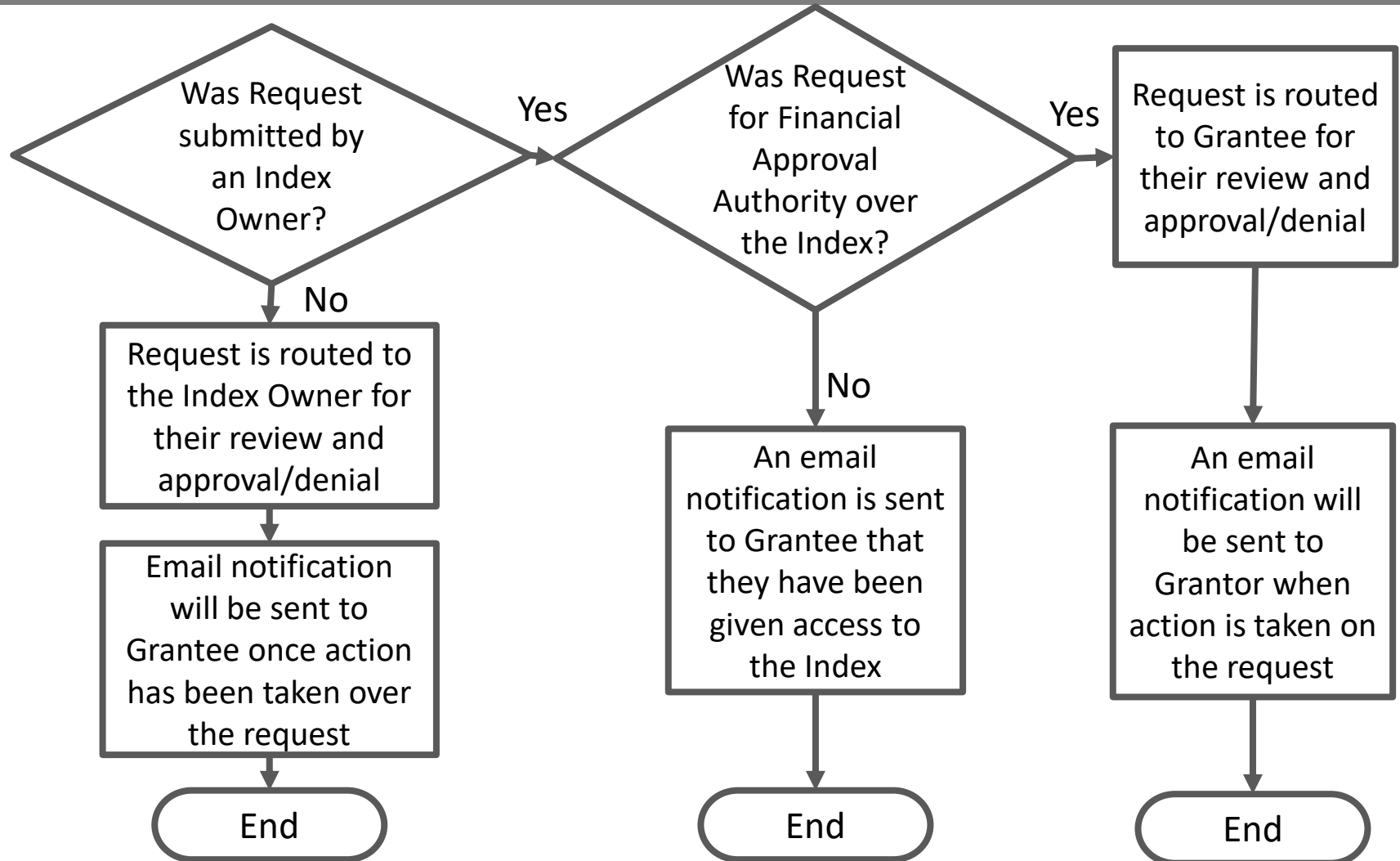
Expiry Date:

# Exploring the FAAM tool ...

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1. How to log in
2. View My Access
3. Reviewing initial options available to non-owners
  - 'Request Access'
  - 'View My Access'
4. Request Access
  - Exploring what the various combinations mean

# What happens after your request is submitted?




# Examples For Fund Owners


# Owner Example: Granting Access

**Only an Owner can request access  
for someone other than  
themselves**

### Request Access

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Who are you requesting access for? \*  

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

Select the Index: \*     
Purchasing

Financial Approval Authority: \*  Yes  No

Travel and Expense Financial Approver: \*  Yes  No

Access Type: \*

eShop Access: \*  Yes  No

Effective Date: \*

Expiry Date:

# Owner Example: Removing Access

**Only Owners can remove access for people other than themselves**

## Special Instructions (you don't access this option from 'Request Access':

- Once in FAAM, choose 'Financial Ownership and Notification Options'
- From the new screen, select the Index you want to review

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
	2017-10-02		Posting	✓	None	Current
	2015-09-23		Posting	✓	None	Current
	2015-09-23		Posting	✓	None	Current

Showing 1 to 3 of 3 entries Previous 1 Next

*\*The names have been greyed out*

# Where to find help?

Still have questions?

Email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).

Interested in FAAM Tools and Support?

Find how-to sheets, frequently asked questions and this presentation at:

[www.carleton.ca/FACTS/FAAM](http://www.carleton.ca/FACTS/FAAM)