Financial Access and Authority Management (FAAM) Tool 101

2018
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
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 101
How does FAAM fit into the Financial Systems Landscape at Carleton?
FAAM 101

FAAM can Provide Access to which Systems/ Applications?

- Finance Classic Reporting
- Budget Adjustment and Forecasting (Email tina.dewar@carleton.ca)
- Journal Voucher (Email tina.dewar@carleton.ca)
Index: A short code for the following elements of the FOAPAL accounting string: Fund, Organization, Program

How to figure out what the index for your funding sources is …

Departmental indexes can be either…

Operational: D+Orgn
(e.g. D498 – Financial Services)

Ancillary: A+Orgn
(e.g. A647 – Residences)

Research indexes are always the …

Fund Number
(e.g. 555555)
<table>
<thead>
<tr>
<th>Level of Authority on Index</th>
<th>Query (user can ...)</th>
<th>Posting (user can ...)</th>
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<th>Implicit approval limit</th>
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<tbody>
<tr>
<td>System</td>
<td>FAST / Banner</td>
<td></td>
<td>FAST Pcard / eCard</td>
<td>Travel &amp; Expense Reimbursement</td>
<td>eShop</td>
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Making Sense of ‘Request Access’

Types of Access

Know your fact$
### Example: Requesting Access to eShop

**Question:** Why has ‘Posting’ been chosen for ‘Access Type’?

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**Request Access**

- **Who are you requesting access for?**
  - Myself

- **Select the Index:** D507
  - Purchasing

- **Financial Approval Authority:**
  - Yes
  - No

- **Travel and Expense Financial Approver:**
  - Yes
  - No

- **Access Type:** Posting

- **eShop Access:** Yes
  - No

- **eShop Implicit Approval Limit:** 0

- **Effective Date:** 20/09/2017

- **Expiry Date:** 

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*FAAM 101*
**Example: Requesting Access to FAST Finance Classic**

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**Question:** Why has ‘Query’ been chosen for ‘Access Type’?
**Example: Expiry Dates**

**Question:** Why would I add an expiry date?

**Keep in Mind:** Students ALWAYS have an expiry date.
Question: What does it mean if an owner wants to delegate financial approval authority to me?
# Making Sense of ‘Request Access’

## Types of Access

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Know your fact$
Exploring the FAAM tool ...

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
FAAM 101
What happens after your request is submitted?

Was Request submitted by an Index Owner?

No

Request is routed to the Index Owner for their review and approval/denial

Email notification will be sent to Grantee once action has been taken over the request

End

Yes

Was Request for Financial Approval Authority over the Index?

No

An email notification is sent to Grantee that they have been given access to the Index

End

Yes

Request is routed to Grantee for their review and approval/denial

End

No

An email notification will be sent to Grantor when action is taken on the request

End
Examples
For Fund Owners
Only an Owner can request access for someone other than themselves.
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

*The names have been greyed out*
Still have questions?
Email 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