

# FAST MyResearch How-To Sheets

## 2. Financial Analysts: How can I find out who has been assigned to my Fund?

### This how-to sheet outlines the steps required to:

- Find which Financial Analyst has been assigned to oversee the research Funds within my department.
- There are two ways to do this:
  - using the MyResearch application (steps 1 and 2)
  - by visiting our website (steps 3 to 5)

### What is the role of a Financial Analyst?

- Assists in interpreting and ensuring compliance with funding agency regulations
- Provides advice and ensures compliance with Carleton’s policies related to research
- Advises on appropriate procedures for financial transactions
- Issues invoices and financial reports

September 2024

### STEPS (using the MyResearch application)

1 From the MyResearch landing page, click on any Fund number listed.

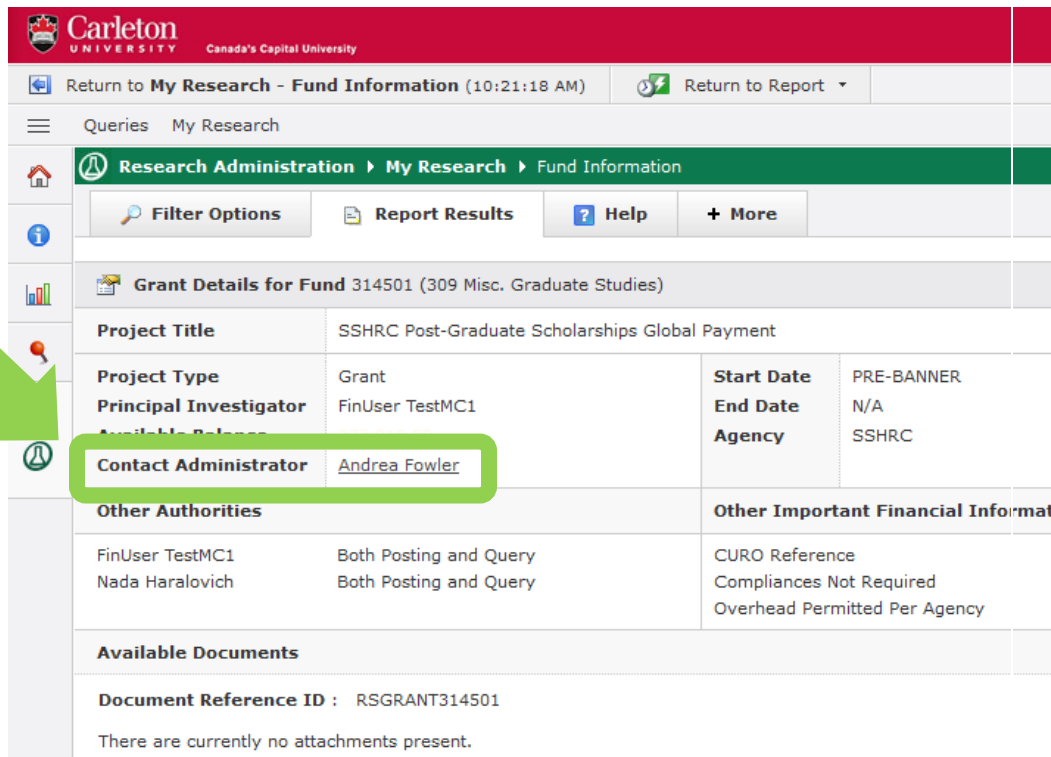


Click on any text element below to access information related to your grant, contract or project.  
Click on the balance to access the transaction detail in Finance Reporting.  
*Closed funds are included for information purposes only.*

Fund	Title	Agency	End Date	Principal Inv.	Authority	Balance
314501	SSHRC Post-Graduate Scholarships Global Payments	SSHRC	N/A	Laura Landriault	Both Posting and Query	14,567.79
319999	Demographic Research Grant for Training Purposes	NSERC	31-MAR-2024	Laura Landriault	Both Posting and Query	19,000.00
305199	Systematic Review and Data Analysis of Fishing	Fish Can	31-MAR-2020	Office of VP Research and International	Query	30,000.00

- 2 A Financial Analyst's name is listed next to 'Contact Administrator'.

To contact the Financial Analyst, click on their name to open an e-mail message addressed to them.



The screenshot displays the Carleton University Research Administration interface. The page title is "Return to My Research - Fund Information (10:21:18 AM)". The breadcrumb trail is "Research Administration > My Research > Fund Information". The main content area shows "Grant Details for Fund 314501 (309 Misc. Graduate Studies)".

<b>Project Title</b>	SSHRC Post-Graduate Scholarships Global Payment		
<b>Project Type</b>	Grant	<b>Start Date</b>	PRE-BANNER
<b>Principal Investigator</b>	FinUser TestMC1	<b>End Date</b>	N/A
<b>Contact Administrator</b>	<a href="#">Andrea Fowler</a>	<b>Agency</b>	SSHRC

**Other Authorities**

FinUser TestMC1	Both Posting and Query	<b>Other Important Financial Information</b>
Nada Haralovich	Both Posting and Query	

**Available Documents**

**Document Reference ID :** RSGRANT314501

There are currently no attachments present.

## AN ALTERNATE WAY TO FIND THE SAME INFORMATION .... STEPS (by visiting our website)

3 Enter this URL into an internet browser. <http://www.carleton.ca/financialservices/research-financial-services/>

4 Click on the red 'CLICK HERE' text.

The screenshot shows a website navigation menu on the left with the following items: RESEARCH FINANCIAL SERVICES (with a close button), Which Financial System Do I Use To ..., eShop, FAAM, MyResearch, SAP Concur Travel and Expense Reimbursement, Research Finance 101, Paying a Research Assistant, Forms, Staff Directory, STUDENT ACCOUNTS, and FINANCIAL REPORTS. A green arrow points from the FINANCIAL REPORTS item to a callout box on the right. The callout box has a green border and contains the text: 'Your Contact in Research Financial Services', 'Each department has been assigned a Financial Analyst.', and 'CLICK HERE' in red. To the right of the menu is a 'Spotlight On' section with two items: 'Research Expense Guidelines' with a magnifying glass icon and 'Tri-Agency Principle-Based Approach' with a red maple leaf icon.

5 Once the file has opened, find a department.

### What next?

- Visit the [FACTS' MyResearch tools and support page](#) to find more how-to sheets.