

# Requesting FINANCIAL APPROVAL Access to a Funding Source for Myself

This how-to sheet outlines the steps required to:

- Request FINANCIAL APPROVAL access to a funding source (e.g. 100000-498-1300) for yourself

Why would you request FINANCIAL APPROVAL access?

- You would only request FINANCIAL APPROVAL access to a funding source for yourself if you are in the position to approve transactions initiated by other employees in financial systems (i.e. FAST, Banner, SAP Concur Travel and Expense Reimbursement, eShop)
- If you are not requesting 'approval' access, refer to the 'Requesting Access to a Funding Source for Myself'

## STEPS

- 1 Once you have accessed FAAM, click on the 'Request Access' link.

The screenshot shows the Carleton Central website interface. At the top left is the Carleton University logo with the tagline 'Canada's Capital University'. To the right is a red header bar with 'Carleton Central'. Below this is a navigation menu with tabs for 'Personal Information', 'Student Services', 'Employee Services', 'Financial Services' (which is highlighted in red), and 'WebTailor Administration'. On the right side of the menu, there are links for 'RETURN TO MENU | SITE MAP | HELP | EX'. The main content area is titled 'Financial Access and Approval Authorities'. Below the title is an information icon and a message: '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.' A green arrow points from this message to a green-bordered box containing the 'Request Access' link. Below this link are other options: 'View My Access', 'Financial Ownership and Notification Options', and 'Request eShop ONLY Access'. At the bottom of the page, it says 'RELEASE: 8.7' and '© 2017 Ellucian Company L.P. and its affiliates.'

- 2 Select the funding source you are requesting FINANCIAL APPROVAL access to. 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)

There are two ways to ‘Select the Index’. You can either type an index directly into the field (i.e. D498 in this example) OR you can click on the magnifying glass icon (and then the ‘Search’ button in the window that opens) to see a complete list of indexes.

Personal Information Student Services Employee Services **Financial Services** WebTailor Administration

Feb 17, 2017 12:1

### Request Access

Who are you requesting access for?

Select the Index: \*    
Finance Office

Financial Approval Authority: \*  Yes  No

Travel and Expense Financial Approver: \*  Yes  No \*Only owners may request changes to Travel and Expense Approver.

Access Type: \*

eShop Access: \*  Yes  No

Effective Date: \*

Expiry Date:

- 3 a. Click on the radio button beside ‘Yes’ for “Financial Approval Authority” (formerly known as ‘Signing Authority’)

and

- b. click on the calendar icon to choose an ‘Effective Date’ based on when access is required

and

- c. Click on the grey ‘Submit’ button

Personal Information Student Services Employee Services **Financial Services** WebTailor Administration

Feb 17, 2017 12:12 pm

### Request Access

Who are you requesting access for?

Select the Index: \*    
Finance Office

Financial Approval Authority: \*  Yes  No

Travel and Expense Financial Approver: \*  Yes  No \*Only owners may request changes to Travel and Expense Approver.

Access Type: \*

eShop Access: \*  Yes  No

eShop Implicit Approval Limit: \*

Effective Date: \*

Expiry Date:

- 4 a. Read the 'Terms and Conditions' window that opens up.

**Note:** It is important that you understand what you are agreeing to be accountable for. You can refer to the [Approval and Delegation of Authority Policy](#) to find out who can act as a financial approver.

If you are a researcher, contact the Financial Officer in Research Financial Services assigned to your department with any questions. If you are not a researcher, email questions to [financial.services@carleton.ca](mailto:financial.services@carleton.ca).

- b. Click on the 'I Agree' button.

The screenshot shows a web application interface with a navigation bar at the top containing 'Personal Information', 'Student Services', 'Employee Services', 'Financial Services', and 'WebTailor Administration'. The main content area is titled 'Request Access' and contains several form fields: 'Who are you requesting access for?', 'Select the Index: \*' (with a dropdown menu showing 'D498' and 'Finance'), 'Financial Approval Authority', 'Travel and Expense Financial Services', 'Access Type: \*' (with a dropdown menu showing 'Posting'), 'eShop Access: \*' (with a radio button selected for 'Yes'), 'eShop Implicit Approval Limit', 'Effective Date: \*' (with a date field showing '17/02/20'), and 'Expiry Date:'. A modal window titled 'Terms and Conditions' is open over the form. The modal contains the following text: 'Delegation of Authority Agreement', '1. I understand that I may sign for expenses related to this index on behalf of the Index Owner.', '2. This delegation will remain in effect for the period specified, until revoked by an Index Owner or until such time as I decide to expire the access.', '3. I cannot sub-delegate my authority to another individual.', '4. I am fully aware of the intent, scope, and forecasted activities for the Index, and as such, will be able to verify that the nature of any expense being approved is required to fulfill the objectives of the operating unit or carry out the research as laid out in the original award (Research-related indexes Only).'. At the bottom of the modal are two buttons: 'I Agree' and 'I Do Not Agree'. A green bracket labeled 'a' highlights the text in the modal. A green arrow labeled 'b' points to the 'I Agree' button. The background form has buttons for 'Save', 'Submit', and 'Submit & Add Another' at the bottom.

**Good News!** When requesting FINANCIAL APPROVAL access, you can ignore remaining fields (i.e. those not covered by this how-to sheet).

**What Next?** FAAM will route your request to the funding source owner for review and approval. You will receive an email notification with further details once the request has been approved or declined.