

## 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, eShop).
- If you are not requesting APPROVAL access, refer to the 'Requesting Access to a Funding Source for Myself' how-to sheet.

### 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 the 'Carleton Central' header. Below this is a navigation menu with links for 'Personal Information', 'Student Services', 'Employee Services', 'Financial Services', and 'WebTailor Administration'. The 'Financial Services' link is highlighted in red. Below the navigation menu is the page title 'Financial Access and Approval Authorities'. A green arrow points to a green-bordered box containing the 'Request Access' link, which is highlighted in red. Below this link are three other options: 'View effective, pending and future funding source security assignments', 'Financial Ownership and Notification Options', and 'Request eShop ONLY Access'. At the bottom of the page, there is a 'RELEASE: 8.7' notice and a copyright notice for '© 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 of 'D' + ORGN (e.g. D016 – French)
- Ancillary Indexes are made up of 'A' + ORGN (e.g. A640 – Parking)
- Research and other internally restricted indexes are equal to the FUND (e.g. 55555)

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

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Who are you requesting access for?

Select the Index: \*   x

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' (sometimes 'Financial Approval Authority' is incorrectly called '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

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Who are you requesting access for?

Select the Index: \*   x

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' in the window that opens.

**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 'Request Access' form and a 'Terms and Conditions' modal window. The modal window is titled 'Delegation of Authority Agreement' and contains the following text:

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 window, there are two buttons: 'I Agree' and 'I Do Not Agree'. A green arrow labeled 'b' points to the 'I Agree' button. A green bracket labeled 'a' highlights the terms of the agreement.

**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.