What is Financial Authority Delegation (i.e. Approval-level access)?

- Through Financial Authority Delegation, an Owner can grant an individual or a position permission to approve transactions (e.g. Travel and Expense).
- Delegated authority should only be accepted if it is appropriate for your role at Carleton University.

This how-to sheet outlines the steps required to:

- Accept a request to grant you Approval level access to a funding source (e.g. 100000-498-1300) that has been submitted by a funding source Owner.
- OWNERS are defined as a position or individual with ultimate authority over the funding source and power to delegate financial approval authority.

**STEPS**

1. You receive an email notification that contains the link to the Workflow. Log in using your MyCarletonOne credentials.

   The Workflow: The application where approvals take place (e.g. FAAM, T&E).

   If you lose an email notification, log into the Workflow using:
   - https://casprod.carleton.ca:8443/cas/login
   - and your MyCarletonOne credentials

2. You will see the worklist of items that require your attention.

   Click on the item you want to action.

**IMPORTANT NOTE!** As this is the same Workflow where Travel and Expense (T&E) Claims are approved, outstanding T&E claims may be listed here as well. Those
coming from FAAM will begin
“Financial Security Approval
for...”.

The details of the delegation request will be displayed.

Read the ‘Terms and Conditions of Financial Approval Authority Delegation’ carefully.

If you agree with requested delegation level,

choose “I agree to the terms ...” radio button

and

click on the “Complete” button.

If you do not agree, you can deny the request and provide the Owner with a rational in the ‘Comments’ section.

What Next? The Owner who requested your delegation-access for will receive an email notification about the request status.