

# Accepting the Approval-level Access that You Have Been Delegated

### 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.
- 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:

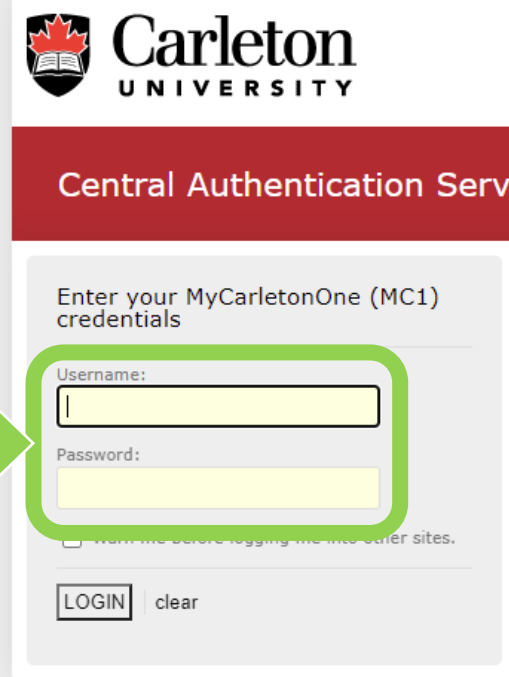
- Accept a request to grant you approval level access to a funding source (e.g. 100000-498-1300) that has been submitted by a funding source owner.
- Owners are defined as a position or individual with ultimate authority over the funding source and power to delegate financial approval authority.


## STEPS

1. You've received an email notification that contains a link. Click on the link.

In the window that opens, log in using your MyCarletonOne credentials.

**Tip:** If you lose a notification email, log into Banner workflow using this link - <http://workflow.carleton.ca:7777/wfprod> - and your MyCarletonOne credentials.



 **Carleton**  
UNIVERSITY

Central Authentication Serv

Enter your MyCarletonOne (MC1) credentials

Username:

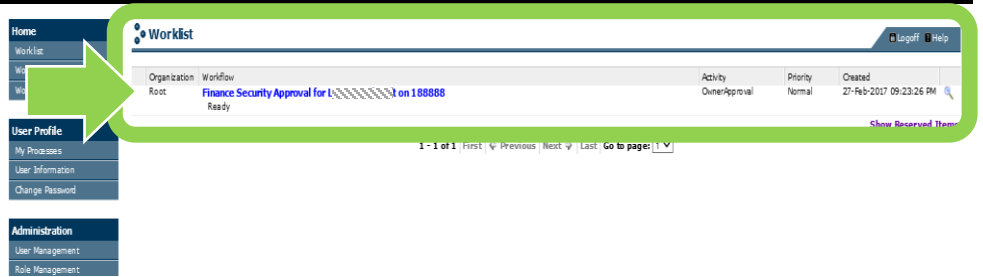
Password:

Remember me before logging me into other sites.

clear

2. The items that require your attention will be listed under 'Worklist'.

Click on the item you want to action.



3. 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, click the 'I agree to the terms ...' radio button

and

click the grey 'Complete' button.

**Note:** If you do not agree, you can deny the request by clicking the radio button beside "I do not agree ...", providing the owner with a rationale in the 'Comments' section, and clicking the grey 'Complete' button.

Your agreement is required for this Financial Authority Access Request.

Index Code: D084 (FASS Computing)

Requested By: [redacted]

Request Date: 2017/Mar-09

**Access Details**

Financial Approval Authority: Requested(Y)

Travel and Expense Financial Approval Authority: Not Requested(N)

General Access Type: Posting and Query

eShop Access: Requested(Y)

eShop Implicit Approval Threshold: Not Requested

Effective Start Date: 2017/Mar-09

Expiry Date: Open-Ended

Agreeing to this request will update any existing access for the specified index.

Effective... | Expiry... | Signing | T&E | Access... | eShop (Up To) |

Terms and Conditions of Financial Approval Authority Delegation

1. I understand that I may sign for expenses related to Index D084 on behalf of the Index Owner.
2. The delegation will remain in effect for the period specified or until revoked by an Index Owner.
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).

\* Approval Actions

I agree to the Terms and Conditions above, and accept this request.

I do not agree to the Terms and Conditions above, and hereby, decline this request.

*If declining, please provide the reason in the Comments.*

Comments:

Complete Save & Close Cancel

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