

#6. Requesting FINANCIAL APPROVAL Access to a Funding Source for Someone Else

This how-to sheet outlines the steps required to:

- Request FINANCIAL APPROVAL access to a funding source (e.g. 100000-498-1300) for someone else (e.g. a new hire, replacement).
- Only funding source OWNERS can grant access to someone else.
- OWNERS are defined as a position or individual with ultimate authority over the funding source and power to delegate financial approval authority.

Why would you request 'approval' access?

- You would only request FINANCIAL APPROVAL access to a funding source for someone else if they are in the position to approve transactions initiated by other employees in financial systems (i.e. FAST, Banner, Travel and Expense, eShop).

IMPORTANT NOTE: If you are not requesting 'approval' access for someone else, refer to how-to sheet #7.

STEPS

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



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Financial Access and Approval Authorities

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 financialservices@carleton.ca.

- Request Access**
Use this option to request a new funding source security assignment for yourself, or if you are an owner, for another individual.
- View My Access**
View effective, pending and future funding source security assignments.
- Financial Ownership and Notification Options**
View funding sources for which you have hierarchical or direct ownership. Update the owner responsible for approving new security requests or which owners should receive email notifications when a security request is approved.
- Request eShop ONLY Access**
Request an eShop account for another individual who should not have access to specific funding sources. This area is restricted to funding source owners.

RELEASE: 8.7

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- 2 For 'Who are you requesting access for?' select 'Someone Else' from the drop down menu

and

enter the individual's Carleton ID in the 'Enter Carleton ID# of the Individual' field that appears OR click on the magnifying glass icon to search for an individual's ID number.

Personal Information Student Services Employee Services Financial Services WebTailor Administration

Request Access Feb 17, 2017 01:37 pm

Who are you requesting access for?

Enter Carleton ID # of the individual: *

Select the Index: *

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 Select the funding source to which you are requesting access for the individual. 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 (and then the 'Search' button in the window that opens) to see a complete list of indexes.

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Request Access Feb 17, 2017 02:19 pm

Who are you requesting access for?

Enter Carleton ID # of the individual: *

Select the Index: *

Financial Approval Authority: * Yes No

Travel and Expense Financial Approver: * Yes No

Access Type: *

eShop Access: * Yes No

Effective Date: *

Expiry Date:

- 4 a. Click on the 'Yes' radio button for "Financial Approval Authority" (formerly known as the 'Signing Authority')

and

- b. Choose an 'Effective Date' based on when access is required

and

- c. Click on the 'Submit' button

To determine who can act as a financial approver, refer to the Approval and Delegation of Authority Policy (<http://carleton.ca/secretariat/policies/>).

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

Note: It is important that you understand what level of responsibility you are delegating to the individual. 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 your fund administrator with any questions. If you are not a researcher, email questions to financial.services@carleton.ca.

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

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.