

Financial Access and Authority Management (FAAM) Service How-to Sheets

Requesting FINANCIAL APPROVAL Access to a Funding Source for Someone Else

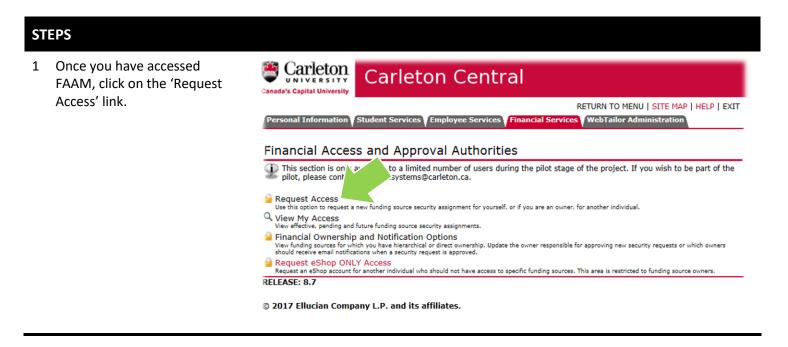
This how-to sheet outlines the steps required to:

- 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, eShop).

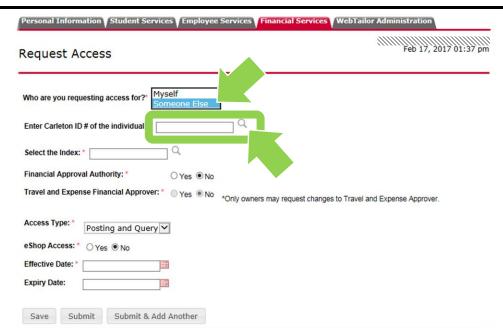
IMPORTANT NOTE: If you are not requesting 'approval' access for someone else, refer to the 'Requesting access to a funding source for someone else' how-to sheet.



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 Carleton ID number.

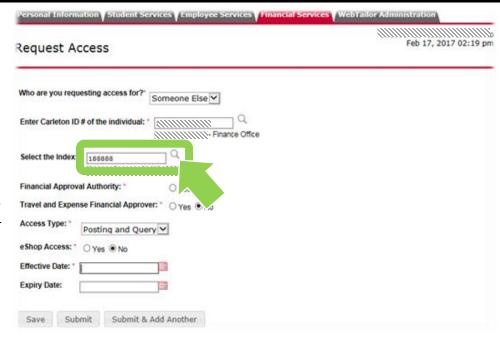


3 Select the funding source you are requesting access to for the individual. The funding source is represented by a short code called an index.

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. 188888 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.



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

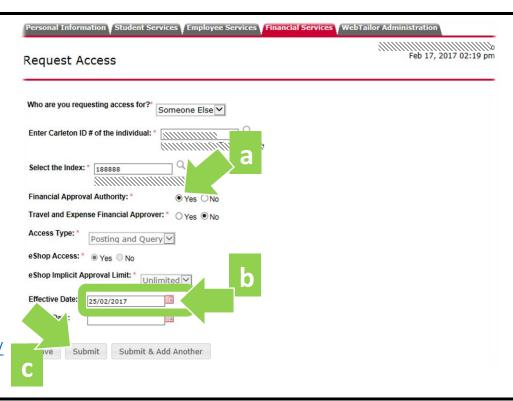
and

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

and

c. Click on the grey '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/).

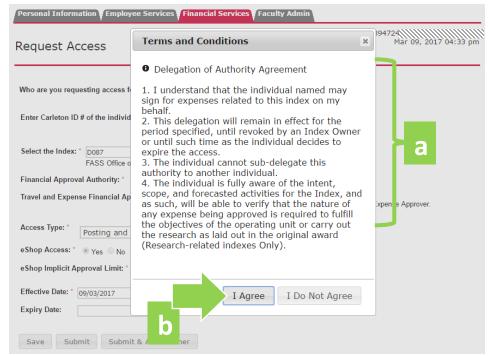


5 a. Read the 'Terms and Conditions' window that opens up.

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 financial officer 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.