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

#9. Approving Access to Your Funding Source for Someone Else

This how-to sheet outlines the steps required to:

- APPROVE the request submitted by an individual in order to have access to a funding source (e.g. 100000-498-1300).
- Only the designated funding source OWNER can approve this type of request.
- 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...”.

   ![Image of Workflow interface]
The details of the delegation request will be displayed.

If you agree with the requested level, choose “I approve this request …” radio button and click on the “Complete” button.

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

Your approval is required for this Financial Authority Access Request.

Index Code: 188888 (FAAM - Training FASS (PER))
Access For: [ ]
Request Date: 2017/Feb-27

Request Details
Financial Approval Authority: Requested(Y)
Travel and Expense Financial Approval Authority: Not Requested(N)
General Access Type: Posting and Query
eShop Access: Not Requested(N)
eShop Implicit Approval Threshold: Not applicable
Effective Start Date: 2017/Apr-01
Expiry Date: Open-Ended

Approval of this request will update any existing access for the specified index.

Effective..[Expiry.....][Signing][T&SE]Access.[eShop (Up To)]

Terms and Conditions of Delegating Financial Approval Authority Access

1. The Delegate named herein may sign, on my behalf, for expenses related to Index 188888.
2. The delegation will remain in effect for the period specified or until revoked by an Index Owner.
3. The authority cannot be sub-delegated to another individual.
4. The Delegate is 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 approve this request and agree to the related Terms and Conditions, where applicable.
- I deny this request. This will permanently cancel the request.

If denying, please provide the reason in the Comments.

Comments:

What Next? The individual for whom you approved or denied access for will receive an email notification regarding the request status.