

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

## Approving Access to Your Funding Source for Someone Else

### This how-to sheet outlines the steps required to:

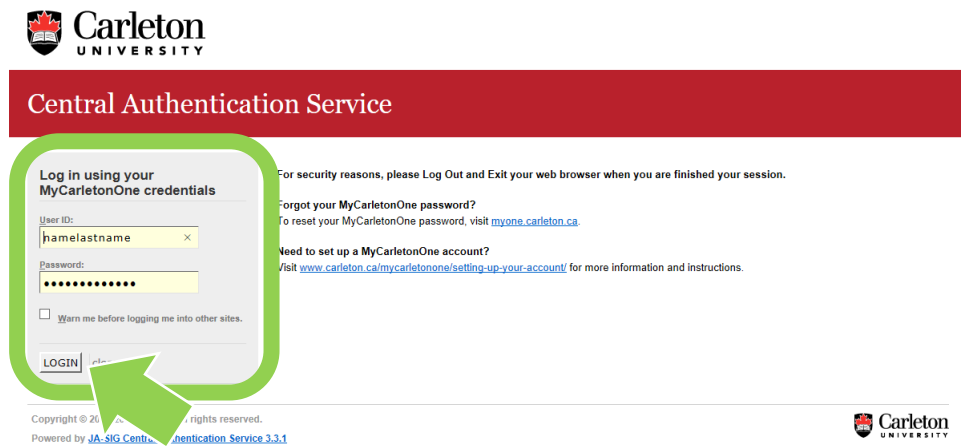
- APPROVE the request submitted by an individual in order to have access to a funding source (e.g. 100000-498-1300) either from an email or through Carleton Central.
- Only the designated funding source OWNER can approve this type of request.
- OWNERS are defined as a position or individual with ultimate authority over the funding source and power to delegate financial approval authority.

### STEPS FOR ACCESSING APPROVALS FROM AN EMAIL (STEPS 1 TO 3)

- 1 You've received an email notification with a link to the Workflow and clicked on the link.

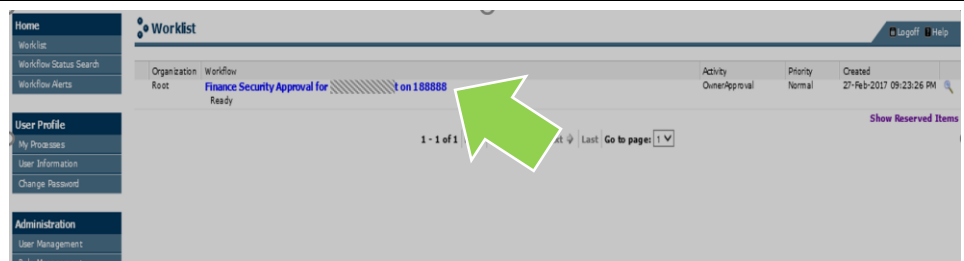
In the screen that opens, log in using your MyCarletonOne credentials. Click on the grey 'LOGIN' button.

If you lose an email notification, log into the Workflow through Carleton Central (page 3 of this how-to sheet),



- 2 Items that require your attention will be listed in the 'Worklist' screen.

Click on the item you want to action.



3 The 'Request Details' will be displayed.

If you agree with the requested level,

Your approval is required for this Financial Authority Access Request.

Index Code: 188888 (FAAM - Training FASS (PER))

Access For: ██████████ (Finance Office)

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&E|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).

choose the 'I approve this request ...' radio button

and

click on the grey 'Complete' button.

If you do not agree with the requested level, choose the 'I deny this request.' radio button to deny the request and provide the requestor with a rationale in the 'Comments' section. Click on the grey 'Complete' button.



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:

Text input field for comments with a vertical scrollbar on the right side.



Complete

Save & Close

Cancel

## STEPS FOR ACCESSING APPROVALS FROM CARLETON CENTRAL (STEPS A TO H)

A Enter this URL into the internet browser of your choice <http://central.carleton.ca/>

B Enter your MyCarletonOne credentials.

Click on the grey 'Login' button.

C Click on the 'Financial Services' tab.

If you do not see a 'Financial Services' tab, email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca) to request access.

D Click on 'Financial Access and Authority Management' to access the FAAM tool.

If you do not see the link, email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca) to request access.

- E Click on the 'Approve Access Requests' link to find 'Access Requests' waiting to be approved.

### Financial Access and Authority Manager

- Request Access**  
Use this option to request a new funding source security assignment for yourself.
- 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
- Request eShop ONLY Access**  
Request an eShop account for another in... should not have access to;
- Approve Access Requests**   
Click here to log into workflow and app... g access requests requiring

- F Log in using your MyCarletonOne credentials.



Click on the grey 'LOGIN' button.

Central Authentication Se

Enter your MyCarletonOne (MC1) credentials

Username:

Password:

Warn me before logging me into other sites.

**LOGIN**

- G Click on a blue 'Expense Approval' text.

**Home**

Worklist

Workflow Status Search

Workflow Alerts

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**User Profile**

My Processes

User Information

Change Password

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**Administration**

User Management

Role Management

Business Events

In-process Monitoring

Banner Workflow Modeler

Workflow System Administration

**Worklist** Logout Help

Organization	Workflow	Priority	Created
Reet	<b>Expense Approval for</b>	Normal	08-Dec-2017 03:05:53 PM

1 - 1 of 1 | First | Previous | Next | Last | Go to page: 1

**Search**

Workflow Organization:

Workflow Specifics Name:

Activity Name:

Created:  To:

Priority:  Urgent  High  Normal  Low  None

State:  Overdue  Lagging

H The details of the delegation request will be displayed.

If you agree with the requested level,

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

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 I deny this request. This will permanently cancel the request.

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Comments:

**Complete** Save & Close Cancel



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