

#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) TWO different ways: from an email and from 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 – ACCESSING APPROVALS FROM AN EMAIL

- 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 through Carleton Central (page 3 of this how-to sheet),



Central Authentication Service

Log in using your MyCarletonOne credentials

User ID: ✕

Password:

Warn me before logging me into other sites.

For security reasons, please Log Out and Exit your web browser when you are finished your session.

Forgot your MyCarletonOne password?
To reset your MyCarletonOne password, visit myone.carleton.ca.

Need to set up a MyCarletonOne account?
Visit www.carleton.ca/mycarletonone/setting-up-your-account/ for more information and instructions.

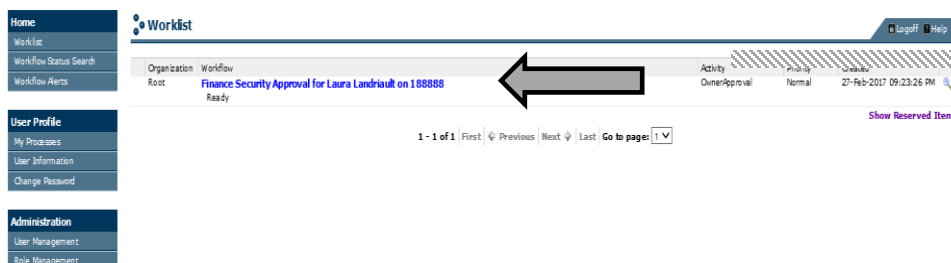
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Powered by [JA-SIG Central Authentication Service 3.3.1](#)



- 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...”.



Organization	Workflow	Activity	Priority	Creation
Root	Finance Security Approval for Laura Landriault on 188888	Owner-Approval	Normal	27-Feb-2017 09:23:26 PM

3 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 rationale in the 'Comments' section.

Your approval is required for this Financial Authority Access Request.

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

Access For: [REDACTED]

Request Date: 2017/Feb-27

Request Details

Financial Approval Authority: Requested(Y)

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

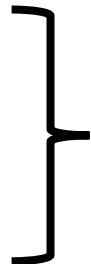
General Access Type: Posting and Query

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).

* 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:

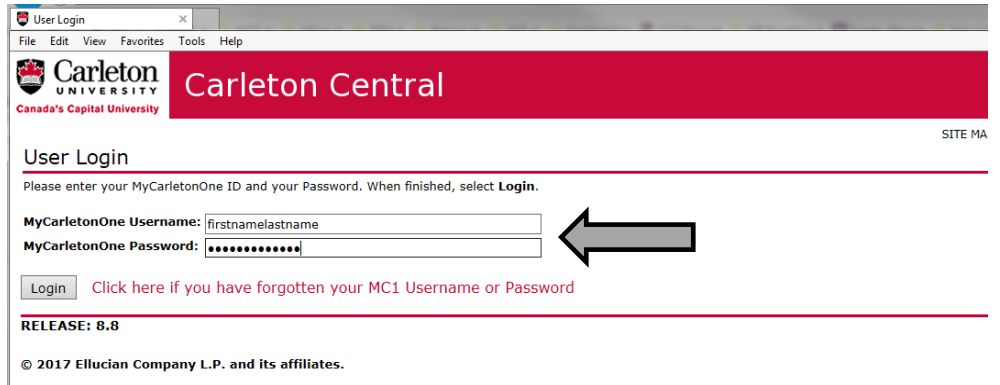
Complete

Save & Close

Cancel

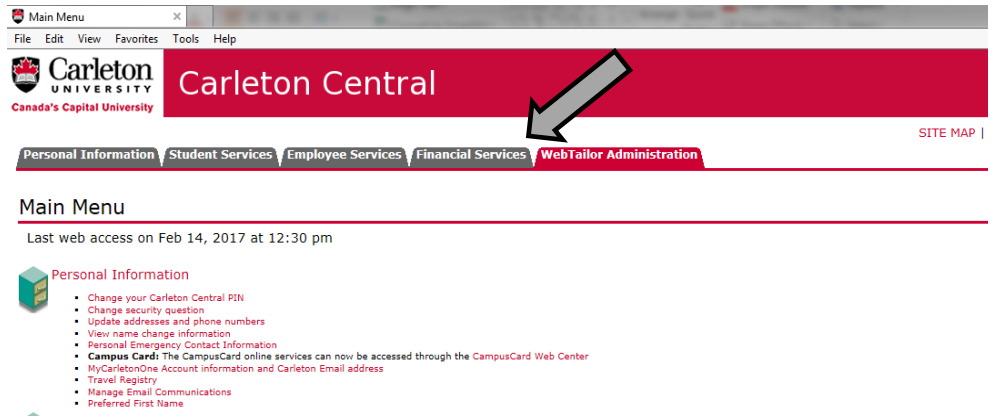
STEPS – ACCESSING APPROVALS FROM CARLETON CENTRAL

- 1 Enter this URL into the internet browser of your choice <http://central.carleton.ca/>
- 2 Enter your MyCarletonOne credentials.

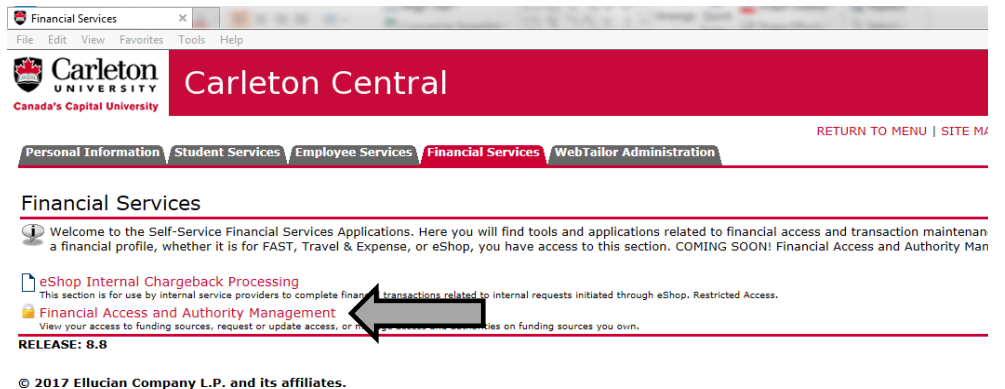


- 3 Click on the 'Financial Services' tab.

If you do not see a 'Financial Services' tab, email financial.systems@carleton.ca to request access.






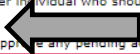


- 4 Click on the 'Financial Access and Authority Management' link to access the FAAM service. If you do not see the link, email financial.systems@carleton.ca to request access.



- 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 individual who should not have access to
-  **Approve Access Requests** 
Click here to log into workflow and approve any pending access requests requiring

- Log in using your MyCarletonOne credentials.



Central Authentication Se

Enter your MyCarletonOne (MC1) credentials

Username:

Password:

Warn me before logging me into other sites.

- Click on a blue 'Expense Approval' text.

The screenshot shows a 'Worklist' interface. On the left is a navigation menu with sections: Home, User Profile, and Administration. The main area displays a table of workflow items. One item is highlighted with a blue bar: 'Expense Approval for Amanda Langton TR057171'. An arrow points to this item. Below the table is a search section with various filters and a search button.

8 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 rationale in the 'Comments' section.

Your approval is required for this Financial Authority Access Request.

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

Access For: [REDACTED]

Request Date: 2017/Feb-27

Request Details

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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.

If denying, please provide the reason in the Comments.

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.
