

# **Requesting FINANCIAL APPROVAL Access to a Funding Source for Myself**

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

- Request FINANCIAL APPROVAL access to a funding source (e.g. 100000-498-1300) for YOURSELF

**Why would you request FINANCIAL APPROVAL access?**

- You would only request FINANCIAL APPROVAL access to a funding source for YOURSELF if you are in the position to approve transactions initiated by other employees in financial systems (i.e. FAST, Banner, eShop).
- If you are not requesting APPROVAL access, refer to the 'Requesting Access to a Funding Source for Myself' how-to sheet.

*Last updated July 27, 2026.*

## **STEPS**

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

The screenshot shows the Carleton Central website. At the top is the Carleton University logo and the text 'Carleton Central'. Below this is a navigation bar with links: 'Personal Information', 'Student Services', 'Employee Services', 'Financial Services', and 'WebTailor Administration'. The 'Financial Services' link is highlighted. Below the navigation bar is the heading 'Financial Access and Approval Authorities'. A green arrow points to the 'Request Access' link, which is highlighted with a green box. Below this link are three other links: 'View effective, pending and future funding source security assignments.', 'Financial Ownership and Notification Options', and 'Request eShop ONLY Access'. At the bottom of the page is the copyright notice: '© 2017 Ellucian Company L.P. and its affiliates.'

**Carleton Central**

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Personal Information | Student Services | Employee Services | **Financial Services** | WebTailor Administration

**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 [financial.systems@carleton.ca](mailto:financial.systems@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 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.

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2. Select the funding source you are requesting FINANCIAL APPROVAL access to. The funding source is represented by a short code called an index.

#### How is the index short code determined?

- Departmental indexes are made up of 'D' + ORGN (e.g. D016 – French)
- Ancillary Indexes are made up of '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 icon (and then the 'Search' button in the window that opens) to see a complete list of indexes.

The screenshot shows the 'Request Access' form with the following fields and options:

- Who are you requesting access for?:
- Select the Index: \*   (A green arrow points to the search button, and another points to the 'Financial Approval' radio button.)
- Financial Approval: \* ☒ 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:
- Buttons: Save, Submit, Submit & Add Another

3. a. Click on the radio button beside 'Yes' for 'Financial Approval Authority' (sometimes 'Financial Approval Authority' is incorrectly called 'Signing Authority')
- and
- b. click on the calendar icon to choose an 'Effective Date' based on when access is required
- and
- c. click on the grey 'Submit' button

The screenshot shows the 'Request Access' form with the following fields and options:

- Who are you requesting access for?:
- Select the Index: \*   (A green arrow labeled 'a' points to the 'Financial Approval Authority' radio button.)
- 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
- eShop Implicit Approval Limit: \*
- Effective Date: \*   (A green arrow labeled 'b' points to the calendar icon.)
- Expiry Date:
- Buttons: Save, Submit, Submit & Add Another (A green arrow labeled 'c' points to the 'Submit' button.)

4. a. Read the 'Terms and Conditions' in the window that opens.

**Note:** It is important that you understand what you are agreeing to be accountable for. 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 the Financial Officer in Research Financial Services assigned to your department with any questions. If you are not a researcher, email questions to [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).

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

The screenshot shows a web application interface with a top navigation bar containing tabs: 'Personal Information', 'Student Services', 'Employee Services', 'Financial Services' (which is highlighted), and 'WebTailor Administration'. The main content area is titled 'Request Access'. On the left side of this area, there are several form fields: 'Who are you requesting access for?' (with a dropdown menu), 'Select the Index:' (with a dropdown menu showing 'D498' and 'Finance' below it), 'Financial Approval Authority' (with a dropdown menu), 'Travel and Expense Financial Approval Authority' (with a dropdown menu), 'Access Type:' (with a dropdown menu showing 'Posting'), 'eShop Access:' (with a radio button selected for 'Yes'), and 'eShop Implicit Approval Limit' (with a dropdown menu). Below these fields are 'Effective Date:' (with a date picker showing '17/02/20') and 'Expiry Date:' (with a date picker). At the bottom of the form are three buttons: 'Save', 'Submit', and 'Submit & Add Another'. A modal window titled 'Terms and Conditions' is open in the center-right of the screen. It contains a heading 'Delegation of Authority Agreement' followed by four numbered points. A green bracket labeled 'a' is positioned to the right of the modal, pointing to the text 'se Approver.' at the bottom right. A green arrow labeled 'b' is positioned below the modal, pointing to the 'I Agree' button.

Personal Information Student Services Employee Services **Financial Services** WebTailor Administration

Request Access

Who are you requesting access for?

Select the Index: \* D498 Finance

Financial Approval Authority

Travel and Expense Financial Approval Authority

Access Type: \* Posting

eShop Access: \* Yes

eShop Implicit Approval Limit

Effective Date: \* 17/02/20

Expiry Date:

I Agree I Do Not Agree

Save Submit Submit & Add Another

**Terms and Conditions**

**Delegation of Authority Agreement**

1. I understand that I may sign for expenses related to this index on behalf of the Index Owner.

2. This delegation will remain in effect for the period specified, until revoked by an Index Owner or until such time as I decide to expire the access.

3. I cannot sub-delegate my authority to another individual.

4. I am 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).

se Approver.

**a**

**b**

**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.