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

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

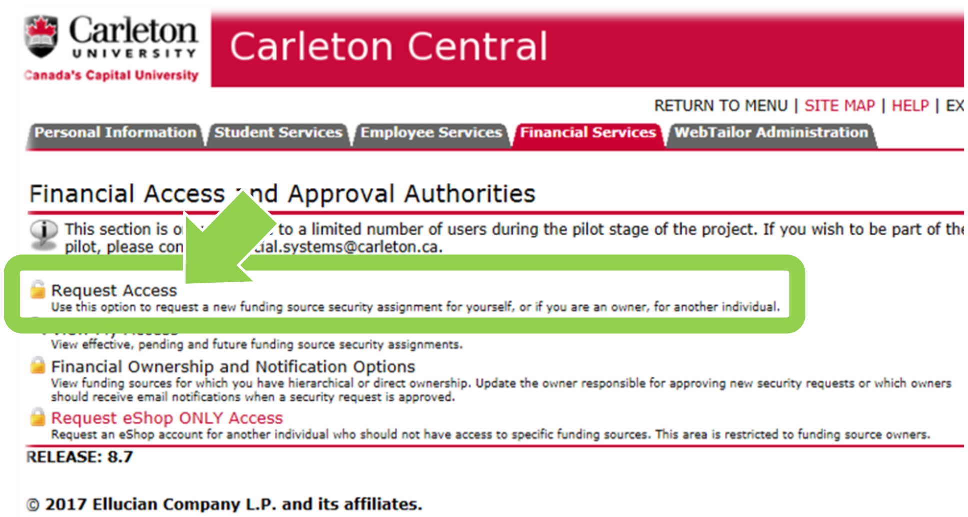
Why would you request FINANCIAL APPROVAL access?

- 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.

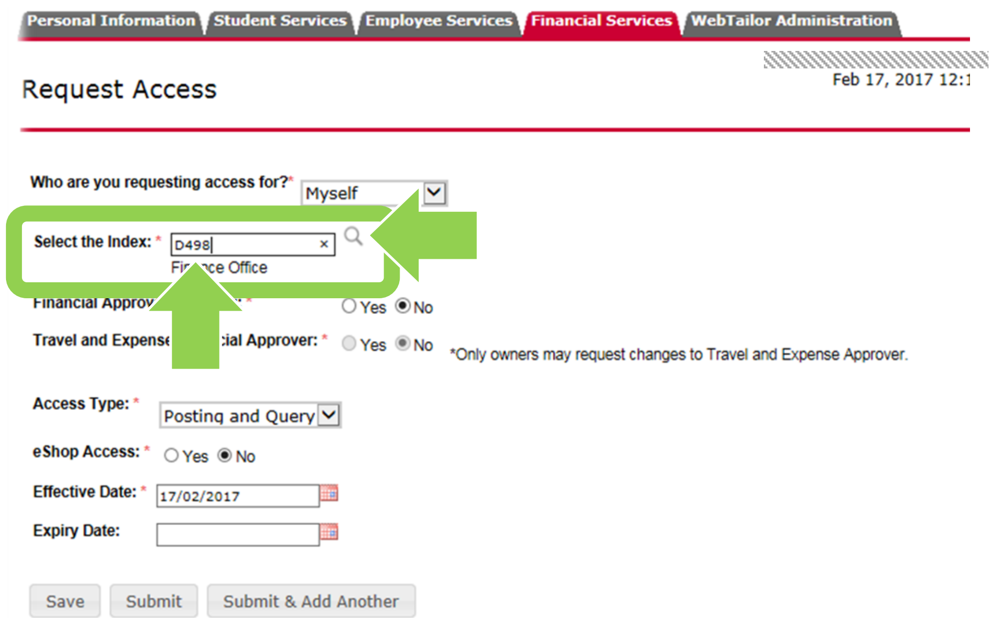


2. Select the funding source you are requesting FINANCIAL APPROVAL access to. The funding source is represented by a short code called an index.

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.



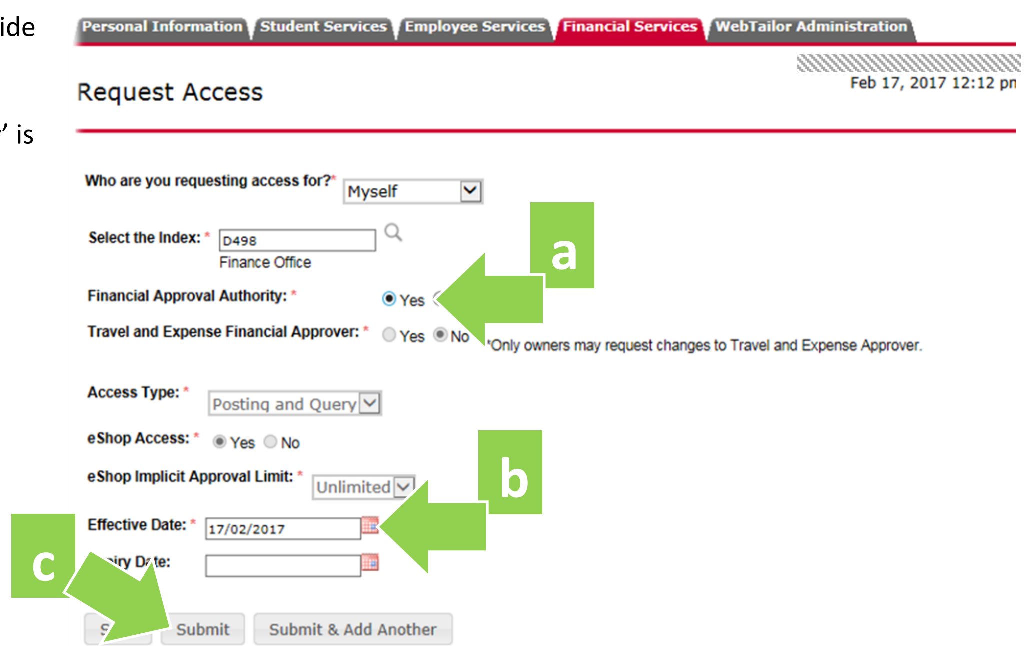
3. a. Click on the radio button beside ‘**Yes**’ for ‘**Financial Approval Authority**’ (sometimes ‘Financial Approval Authority’ is incorrectly called ‘Signing Authority’)

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

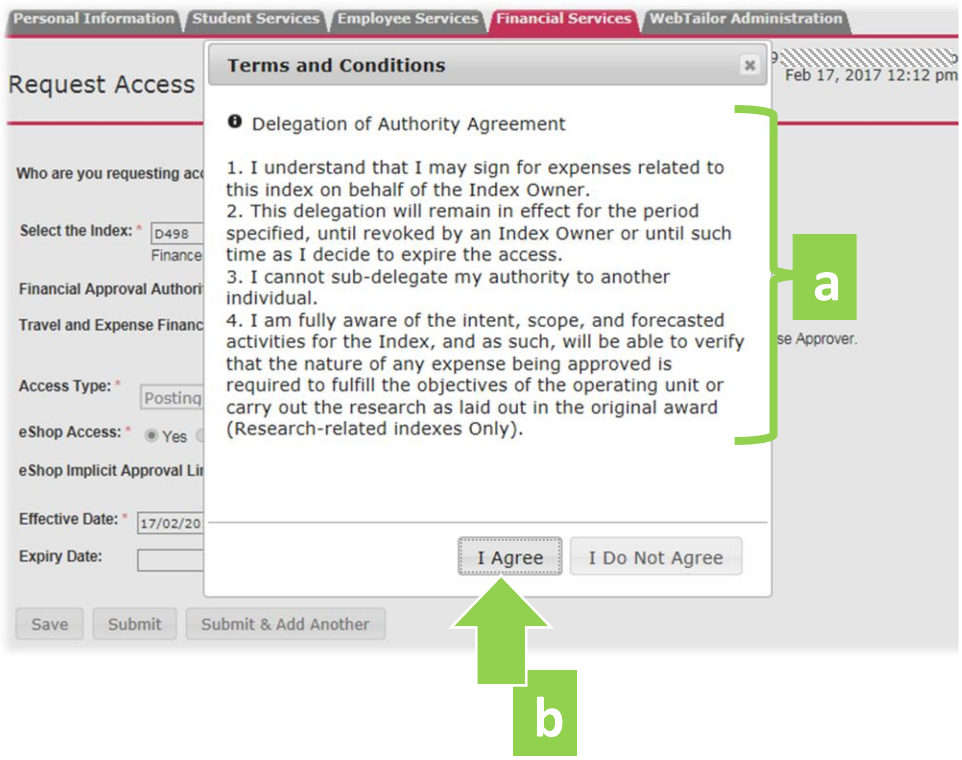


4. a. Read the '**Terms and Conditions**' in the window that opens.

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]().

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.