

TO: President, Vice-Presidents, Deans, Assistant Vice-Presidents, Department Heads/Chairs, and Director

FROM: Mary-Ann Rowlston, Director, Budgets & Financial Analysis
Angela McKinnon, Associate Registrar, Director of Student Information & Systems

CC: Security Administrators

DATE: October 31, 2019

RE: Web for Administrator Role Review Process (Access to Student and/or Financial Information)

'Web for Administrators' is a security feature used by Registrar's Office, Financial Services and Facilities Management to manage access to web programs through Dal Online. Annually, the Unit Authority or the delegated Security Administrator must review the individuals who have been granted access to student and/or financial information; to ensure the access is still appropriate.

Although the formal review of delegation is done on an annual basis, it is important to review this delegation on a regular basis to safeguard student and financial information, while at the same time ensuring Faculty and staff have appropriate access to the information required to carry out their responsibilities.

Identified below are the types of access that could be granted through Web for Administrators.

Academic roles: Academic Security Administrator, Advisor, Class Management, Class Query, Grade Management, Grade Query, 2nd Entry Admissions, Timetable Coordinator.

Financial roles: Finance Security Administrator, Query/Reports, Spending Authority.

Facilities Management role: FAMIS Service Request.

On **October 31, 2019**, a list of individuals who have been delegated one or more of the above roles above can be reviewed through Web for Administrators, under the menu item "Review Assigned Roles". The Security Administrator should review the delegations to ensure that the access provided to individuals is appropriate. There will be some delegations which will require your direct approval (i.e. Security Administrator). For your reference, the steps explaining how to make the changes online are attached.

Please review the list of delegations online and make any appropriate changes **by November 30, 2019**. If you have any questions concerning Web for Administrators, please contact Ian Aylward at 494-6712 for academic inquiries, or Mike Hendsbee at 494-1701 for financial inquiries.

Thank you for your attention to this request.



Angela McKinnon
Associate Registrar, Director of Student Information



Mary-Ann Rowlston, CPA, CA
Director, Budgets & Financial Analysis & Systems

INSTRUCTIONS FOR ANNUAL REVIEW PROCESS IN WEB FOR ADMINISTRATORS

1. Go to **Dal Online** (<http://dalonline.dal.ca>)
2. Click on **Login** in the upper left-hand side of the screen
3. Enter your **Net ID** and **password** then click on the **Login button**
4. Click on **Web for Administrators, Distributed Security, Review Assigned Roles**
5. **Select a role** from the drop-down box you wish to review
6. **NOTE:** Leave the **Orgn Code field blank**
7. Click on **Retrieve Data button**

Note: The roles listed in the drop-down box are the roles you are eligible to approve/revoke. Some of these roles **MUST** be reviewed by you, while others can be reviewed by either you or your Security Administrator.

Recommendation: The Security Administrator should review this information first to minimize the amount of review required by you.

To approve/revoke access through annual review process:

- Once you have reviewed the list of individuals with access to the specified role, either:
 - a. Click on **APPROVE ALL** – if all individuals should continue to have the access specified.
 - b. Click on **APPROVE** for each individual who should continue to have access as specified. This option would be used if some of the accesses listed needs to be revoked.
 - c. Click on **REVOKE ALL** – if all individuals listed should no longer have access as specified. This will remove their access from Web for Administrator.
 - d. Click on **REVOKE** for each individual who should no longer have access as specified. This option would be used when some of the accesses listed needs to be approved.
- Once this role has been reviewed, select another role from the drop-down list. Repeat the above step for each role listed. As each role has been approved/revoked, the roles will be removed from the list.

To Delegate a Role:

- Under the **Distributed Security**, click on **“Update Administrative Security Assignments”**.
- Enter **Dalhousie ID** of the individual being delegated the Query/Reports or FAMIS Service Request role, click the **Continue** button
- Click on the drop-down box beside **“Additional Role”** and select the appropriate role
- An **“Orgn Code”** field will be displayed if Query Reports or Spending Authority is selected. In the box enter your research account code, and then click **Save Changes**.

DEFINITION OF ACADEMIC WEB FOR ADMINISTRATOR ROLES

Academic Security Administrator – can assign and revoke access to Web for Faculty, Advisors and Administrators to employees within their area of responsibility.

Advisor - provides access to student records, including phone numbers and e-mail addresses, students' class schedules, their academic program information, and their academic record.

Class Management - access to view all class lists and the associated cross listings for a department(s), and can assign registration permissions to any of them as required. Department Class Managers also have access to students' personal information, including mailing addresses.

Class Query - access to view all class lists and the associated cross listings for a department. This role also provides access to students' personal information, including mailing addresses.

Grade Management - allows the user to approve grades for classes within a department. The ability for instructors to approve grades is removed if the Department or Faculty chooses to make use of the Grade Management role.

Grade Query - allows the user to view grades that have been recorded and approved within a Department or Faculty.

2nd Entry Admissions Access - enables a user to use the 2nd Entry Admissions system, a system for reviewing and ranking the applicant pool for admission in a Department or Faculty.

Timetable Coordinator – assigned to faculty and staff within a department who are Departmental Schedulers and require access to the Timetable Assistant tool for the purpose of editing and submitting their academic timetable.

DEFINITION OF FINANCIAL SERVICES AND FACILITIES MANAGEMENT WEB FOR ADMINISTRATOR ROLES

Finance Security Administrator - can assign and revoke access to the financial system through 'Web for Administrators' for employees within your area of responsibility. They can delegate access to financial information through Finance Self Serve and various financial, payroll, and telephone reports.

Query/Reports – access to query financial information (including payroll) on specified accounts.

Spending Authority – Query/Reports access described above and the ability to approve expenditures based on the Spending Authority for University Funds Policy (available on Financial Services website under Policies and Signing Authorities).

FAMIS Service Request – submit service request orders through FAMIS Self-Service.