

TO: Researcher

FROM: Mary-Ann Rowlston, Director, Budgets & Financial Analysis

CC: Security Administrators

DATE: October 31, 2019

RE: Web for Administrator Role Review Process
(Access to Financial Information & Spending Authority)

As the individual responsible for the financial management of your research account(s), you can choose to delegate access to financial information and/or spending authority on your research account(s) to individuals through the online tool, 'Web for Administrators'.

It is important to review the delegation of access or spending authority regularly to safeguard financial information and to confirm each individual continues to require access to perform their job function. Under the [Spending Authority for University Funds Policy](#), the minimum amount that can now be delegated to an individual has increased to \$10,000. To increase the authority for individuals previously delegated \$5,000 you will need to revoke the previous Spending Authority delegated at \$5,000 and then create a new delegation at \$10,000.

Under Web for Administrators is a menu item "Review Assigned Roles" which provides a listing of the individuals who are authorized to access your account(s) **as of October 31, 2019**. This list includes information on the type of access they have, who delegated and when it was granted.

Identified below are the types of access that can be granted.

1. **Query/Reports** – access to query financial information (including payroll) on your accounts.
2. **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).

Please review the list of individuals and make any appropriate changes online **between October 31 and November 30, 2019**. For your reference, the steps explaining how to make the changes online are attached.

If you have any questions, please contact Mike Hendsbee at 494-1701.

Thank you for your attention to this request.



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INSTRUCTIONS FOR ANNUAL REVIEW PROCESS IN WEB FOR ADMINISTRATORS

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

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 listed should continue to have the access.
 - b. Click on **APPROVE** for each individual who should continue to have access as specified. This option would be used if some of the access listed needs to be revoked
 - c. Click on **REVOKE ALL** – if the individuals listed should no longer have access. This will remove their access from Web for Administrator.
 - d. Click on **REVOKE** for any individual who should no longer have access. This option would be used if some of the access 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 person 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**.

To revoke the \$5,000 spending limit and then delegate \$10,000 spending limit:

1. Follow **steps 1 – 6** above
2. Click on **Update Administrative Security Assignments**
3. Enter the **Dalhousie ID** for the individual you wish to revoke the \$5,000 spending from.
4. Click **Continue**
5. Under the bottom section of the screen, click on the **Revoke button** associated with the Spending Authority on the account with \$5,000
6. From the drop-down list, select **Spending Authority**, enter the **account** and the maximum amount will be **\$10,000**.
7. Click **Save Changes**

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