

How to Assign Proxy on Faculty, or Major Service or Support Unit accounts via Web for Administrators

July 23, 2019

The following instructions describe the steps a Unit Authority of a Faculty or Major Service or Support Unit must follow to assign the proxy role on his/her accounts through Web for Administrators. The “Unit Authority Proxy” role can be assigned according to the “Spending Authority for University Funds” Policy as found on Financial Services web site.

Please note: Anyone who has been assigned the Unit Authority Proxy role in Web for Administrators, will be granted access to all the accounts for that area through Finance Self Service (FSS) and ePrint for the specified time period. This includes access to the “Hours and Fringe Benefit” report. The proxy will have all the powers of the Unit Authority during the period of the Unit Authority’s absence.

1. Obtain the Dalhousie ID (B00#) of the proxy.
2. Log in to **Dal Online** (<https://dalonline.dal.ca/>) using your Net ID and password.



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3. Click on **Web for Administrators**

DALHOUSIE UNIVERSITY DAL ONLINE (DEVL) SITE MAP | HELP | EXIT

Main Menu Employees Personal Information Administrators

Main Menu

Welcome to the Dalhousie Online Information System! Last web access on Mar 30, 2017 at 01:06 pm

- Web for Employees**
Employee Job History, Pay and Benefits Information, Compensation and Benefits Statement, Taxes, Absence and Overtime Reporting, Retirement Projection Tools
- Personal Information**
View and update mailing addresses, phone numbers and e-mail addresses
- Web for Administrators**
Query Budget and Encumbrance data and view financial data. Update User role(s). Process electronic forms and transactions.

4. Click on **Distributed Security**

DALHOUSIE UNIVERSITY DAL ONLINE (DEVL) RETURN TO MENU | SITE MAP | HELP | EXIT

Main Menu Employees Personal Information Administrators

Web for Administrators

- Finance**
Query Budget and Encumbrance data and view financial data
- Distributed Security**
Administrative functions for assigning security and web roles
- Your Security**
View your security profile.
- Electronic Forms and Transactions**
Electronic forms and transactions for administrative support

5. Click on **Update Administrative Security Assignments**

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DALHOUSIE UNIVERSITY DAL ONLINE (DEVL)

WEB FOR ADMINISTRATORS | SITE MAP | HELP | EXIT

Main Menu Employees Personal Information Administrators

Distributed Security

- [View an Employee's Security Profile](#)
View information pertaining to an employee's user profile, such as assigned roles and Organization
- [Update Administrative Security Assignments](#)
Assign or revoke roles.
- [Query Security Assignments](#)
Query on Web for Administrators security assignments, by role or organization code

Click on Update Administrative Security Assignments

6. Enter the **Dalhousie ID** (B00#) of the proxy and click on the **Continue** button

DALHOUSIE UNIVERSITY DAL ONLINE (DEVL)

DISTRIBUTED SECURITY | SITE MAP | HELP | EXIT

Main Menu Employees Personal Information Administrators

Update Administrative Security Assignments

Please visit the "Review Assigned Roles" link under the Distributed Security Menu to review the roles that have been delegated. This is part of an annual review process.

Enter the Dalhousie ID of an employee whose roles you wish to modify

Dalhousie ID:

Enter the person's Dalhousie ID (B00#) & click on the Continue button

7. Click on the drop down box beside Additional Role and select **Unit Authority Proxy**.

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- To assign an additional user role, choose a Role from the drop-down list, and if prompted, enter an Orgn code. Please note that not all roles require an Organization code to be defined. Then click the "Save Changes" button.
- To revoke a user role, click on the "Revoke" button.
- If there is no Revoke button displayed beside the role description, you do not have the authority to remove the assigned role(s). Please contact the individual who has assigned the role for further assistance.

B00 whose last Dal Online access was Oct 27, 2016 01:21 pm

Assign an additional Organization-based role to this employee's Security Profile:

Additional Role	Role	Access to	Max A
<input type="button" value="Save Changes"/> <input type="button" value="Revoke"/>	<input type="text" value="Select-"/>		
This Employee is not a Unit Authority	Advisor		
Web for Administrators As	Bookings Administrator		
	Bookings Security Administrator		
	FAMIS Service Request		
	Finance Security Administrator		
	Query/Reports		
	Spending Authority		
	Unit Authority Proxy		
	Administrative Support		

Role: Access to: Max A

Select Unit Authority Proxy

8. In the Orgn Code field, **enter your Senior Admin code** the person identified will be acting on behalf of you during your absence. This will grant the person with total budget spending authority on all operating, capital, special purpose, endowment accounts under this senior admin code. It will also grant them full spending authority on research accounts that you have because of your position as Unit Authority over the Faculty, Major Service or Support Unit.

If you are not positive what your **Senior Admin code** is, if you go into **Web for Administrators – Your Security – View your security profile**, under the **“This Employee is a Unit Authority for”** section, you will see a 5 character code that begins with either a “S” or “A”. This is your Senior Admin code.

Next, you will adjust the **start and end time period** to reflect when you will be out of the office. Note: the minimum number of days would be **5** calendar days and the maximum would be **42** days. Once the time period is accurate, click on **Save Changes**.

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Main Menu Employees Personal Information **Administrators**

Update Administrative Security Assignments

- To assign an additional user role, choose a Role from the drop-down list, and if prompted, enter an Orgn code. Please note that not all roles require an Organization code to be defined. Then click the "Save Changes" button.
- To revoke a user role, click on the "Revoke" button.
- If there is no Revoke button displayed beside the role description, you do not have the authority to remove the assigned role(s). Please contact the individual who has assigned the role for further assistance.

B00 [REDACTED] whose last Dal Online access was Oct 27, 2016 01:21 pm

Assign an additional Organization-based role to this employee's Security Profile:

Additional Role	Unit Authority Proxy	Orgn Code:	
Start Date (DD-MON-YYYY):	30-MAR-2017	End Date (DD-MON-YYYY):	29-APR-2017

The proxy period must be between 1 and 30 days; start date must be less than 180 days in the future.

This Employee is not a Unit Authority

Web for Administrators Assigned Roles:

Role:	Access to:	Max Amount:	Assigned By:	Effective Date:
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9. Exit Dal Online