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.
3. Click on **Web for Administrators**

![Click on Web for Administrators]

4. Click on **Distributed Security**

![Click on Distributed Security]

5. Click on **Update Administrative Security Assignments**
6. Enter the **Dalhousie ID (B00#)** of the proxy and click on the **Continue** button.

7. Click on the drop down box beside Additional Role and 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.
How to Assign Proxy on Faculty, or Major Service or Support Unit accounts via Web for Administrators
July 23, 2019

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.

<table>
<thead>
<tr>
<th>B00</th>
<th>whose last Dal Online access was Oct 27, 2016 01:21 pm</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Additional Role</th>
<th>Unit Authority Proxy</th>
<th>Orgn Code:</th>
</tr>
</thead>
</table>

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.

9. Exit Dal Online