How to Delegate Spending Authority on Research accounts via Web for Administrators
July 23, 2019

The following instructions describe the steps a Researcher must follow to delegate spending authority on his/her accounts through Web for Administrators. Spending authority role can be delegated according to the "Spending Authority for Research Funds" Policy as found on Financial Services web site.

Please note: Anyone who has been delegated Spending Authority role in Web for Administrators, will also be granted access to the research accounts through Finance Self Service (FSS) and ePrint. This includes access to the "Hours and Fringe Benefit" report.

Delegating $10,000 Spending Authority limit:

These individuals will be able to authorize any financial transaction $10,000 or less.

1. Obtain the Dalhousie ID (B00#) of the delegate.

2. Log in to **Dal Online (https://dalonline.dal.ca/)** using your Net ID and password.

3. Click on **Web for Administrators**

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4. Click on **Distributed Security**

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

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

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

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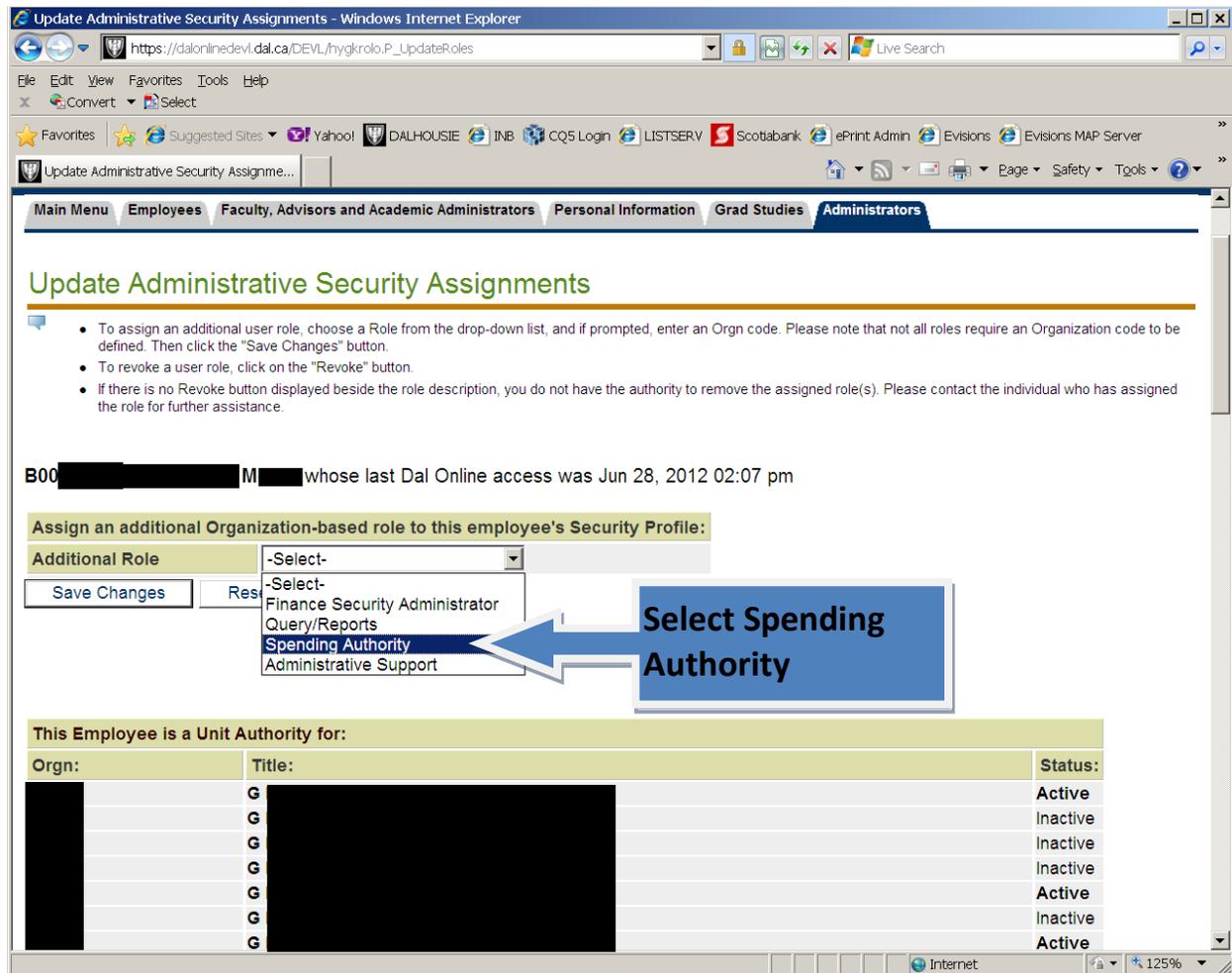
8. In the Orgn Code field, **enter a Sr Admin code (eg. SAXXX), Dept code (D#####) or posting level account (1#### or 4####)** the person identified is allowed to approve spending against, and then click on **Save Changes**. The default spending amount will be $10,000.
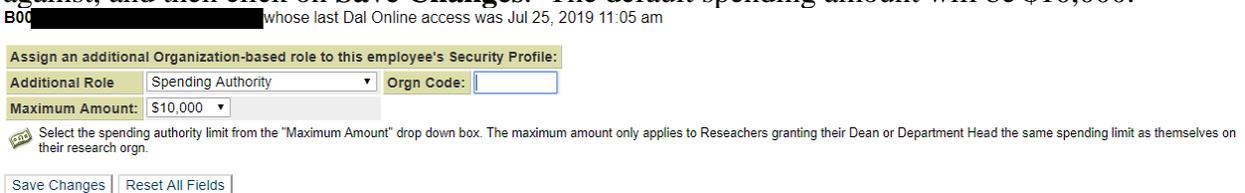
9. Repeat step 8 for each account you wish to delegate to the individual.

10. Exit Dal Online or click on the Distributed Security at the top of the screen and repeat steps 6 – 9 for the next person you would like to authorize to have spending authority on your account(s).

Delegating $100,000 Spending Authority limit:

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These individuals will be able to authorize any financial transaction $100,000 or less.

All the above steps remain the same except for step #8. In order to delegate $100,000, the only Orgn Codes that can have this limit assigned this limit are those that start with a 'D', 'S' or 'A' (department, faculty or major service unit codes).

There is a limit to the number of people who can have this amount.
- Faculty or Major Service Unit (SXXXX) – two individuals may have $100,000.
- Department (D#####) – one individual may have $100,000

From the drop down, select $100,000. The only individuals who can be assigned this limit are those who are DPMG employee at level 5 or higher.

Delegating Total Budget Spending Authority limit:

Research Accounts:
To delegate spending authority for transaction greater than $10,000 to your Dean and/or Department Head, please follow the above steps, however at step #8 after you enter the research account in the **Orgn Code** field, select **Total Budget** from the Maximum Amount drop down list and click the **Save Changes** button. An error message will appear if the Dalhousie ID entered is not your Dean or Department Head. Spending authority for transactions greater than $10,000 can **ONLY** be granted to your Dean and/or Department Head.

Department Accounts (D#####):
To delegate spending authority to your Chair, Department Head, Director or Manager responsible for the budget and operations of a department, the Unit Authority (Dean or AVP) may delegate Total Budget. It is the same process as for the Research accounts above. Please note: if this individual is not setup in Banner Finance as the individual responsible for the department code (D#####), the Total Budget will not be available. Please contact finweb@dal.ca to notify of changes in personnel.

Please note: when Chairs, Department Heads, Directors and Managers leave their position, the person replacing them do NOT automatically get setup with spending authority. This is a conscious decision the Unit Authority must make and action.