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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** (<u>https://dalonline.dal.ca/</u>) using your Net ID and password.

DALHOUSIE UNIVERSITY Inspiring Minds	AL ONLINE	
	HELP	EXIT
User Login		
IMPORTANT: As of June 26, 2012, Dal Online	a requires you to use your NetID and password.	
Please enter your NetID and password, then click	ck Login. When you are finished, please Exit and close your browser to protect your privacy.	
Don't know your NetID? Forgot your passw	vord? Visit the NetID & Password Assistant.	
NetID: Password:		
Login Click Here for Help with Login?		
RELEASE: 8.3		

3. Click on Web for Administrators

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DALHOUSIE UNIVERSITY Inspiring Minds 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 I	Dec 04, 2007 at 01:18 pm
Web for Employees Personal Information, Job History, Benefit and Deduction History, Tax Forms - T4 Statement of Rer Personal Information Change your Personal Identification Number (PIN) and 5 reset your NetID password Web for Administrators Query Budget and Encumbrance data and primancea Return to Homepage	nuneration and TD-1 addresses, phone numbers, and e-mail addresses; and and Update User role(s).
RELEASE: 7.3 D1	

#### 4. Click on **Distributed Security**

DALHOUSIE UNIVERSITY Inspiring Minds	
	RETURN TO MENU   SITE MAP   HELP   EXIT
Main Menu Employees Personal Information Administrators	
Web for Administrators	
Finance	
Query Budget and Encumbrance data and view nancial doc Click on Distributed	
Administrative functions for assigning Orgn University and Security	
Your Security	
View your security profile.	
RELEASE: W4A VERSION 1.0	

5. Click on Update Administrative Security Assignments

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DALHOUSIE UNIVERSITY Inspiring Minds DAL ONLINE (DEVL)	
	WEB FOR ADMINISTRATORS   SITE MAP   HELP   EXIT
Main Menu Employees Personal Information Administrators	
Distributed Security	
View an Employee's Security Profile	Click on Update
View information pertaining to an employee's user profile, such as assigned bad O	Administrativo Socurity
Assign or revoke roles associated with organization security	Automistrative Security
Query Security Assignments	Assignments
dely of the for think and seeding designments, by fore of organization code	
<u> </u>	
RELEASE: W4A VERSION 1.0	
6 Enter the Dalhousie ID (B00#) of the delegate	and click on the <b>Continue</b> button
Enter the Damousle ID (Doon) of the delegate	and check on the continue button
UNIVERSITY DAL UNLINE (DEVL)	
Main Menu Employees Personal Information Administrators	
Lindete Administrative Security Assignments	
Opdate Administrative Security Assignments	
Enter the Dalhousie ID of an employee whose roles you wish to modify	the nerrow's
Enter	the person's
Dalhousie ID: Dalho	usie ID (B00#) & click
on the	e Continue button
Continue Reset	
RELEASE: WEB FOR ADMIN, R2	

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

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🖉 Update Administrative Security Assignments - Windows Internet Explorer	<u> </u>
🚱 😔 👻 https://dalonlinedevl.dal.ca/DEVL/hygkrolo.P_UpdateRoles 💿 🔒 🗟 🍫 🗶 🦉 Live Search	<b>₽</b> -
Ele Edit View Favorites Iools Help ★ €_Convert ▼ DSelect	
🖕 Favorites 👍 🍘 Suggested Sites 🔻 🞯 Yahool 👿 DALHOUSIE 🥘 INB 🙀 CQ5 Login 🍘 LISTSERV 🗾 Scottabank 🍘 ePrint Admin 🍘 Evisions 🧶 Evi	sions MAP Ser∨er →
👿 Update Administrative Security Assignme 📓 👻 🖃 🖷 💌 Bage 🕶	Safety 🕶 Tools 🕶 🕡 💌 🎽
Main Menu Employees Faculty, Advisors and Academic Administrators Personal Information Grad Studies 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 O 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 individ the role for (where assigned role(s). Please contact the individ the role for (where assigned role(s). Please contact the individed the role of the role	rganization code to be ual who has assigned
B00 M whose last Dal Online access was Jun 28, 2012 02:07 pm Assign an additional Organization-based role to this employee's Security Profile: Additional Role -Select- Save Changes Rest Finance Security Administrator Query/Reports Select Spending Spending Authority Administrative Support Authority	
This Employee is a Unit Authority for:	
Orgn: Title:	Status:
G	Active
Gillin	nactive
G	nactive
G	nactive
	Active
	4ctive Image: Image

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.

Assign an additiona	I Organization-based role to this er	nployee's Secur
Additional Role	Spending Authority •	Orgn Code:
Maximum Amount:	\$10,000 •	
Select the spendin their research orgn	g authority limit from the "Maximum Amou 1.	nt" drop down box.
Save Changes Re	set All Fields	

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:**

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.