

# How to Delegate Spending Authority on Research accounts via Web for Administrators

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.*

## For Transactions less than or equal to \$5,000:

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.

**DALHOUSIE UNIVERSITY**  
Inspiring Minds

**DAL ONLINE**

HELP | EXIT

### User Login

**IMPORTANT:** As of June 26, 2012, Dal Online requires you to use your **NetID and password**.

Please enter your NetID and password, then click Login. When you are finished, please Exit and close your browser to protect your privacy.

Don't know your NetID? Forgot your password? Visit the [NetID & Password Assistant](#).

NetID:

Password:

[Click Here for Help with Login?](#)

RELEASE: 8.3

3. Click on **Web for Administrators**

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The screenshot shows the 'DAL ONLINE (DEVL)' interface. At the top left is the Dalhousie University logo with the tagline 'Inspiring Minds'. The top right contains the text 'DAL ONLINE (DEVL)' and navigation links 'SITE MAP | HELP | EXIT'. Below the header is a navigation bar with 'Main Menu', 'Employees', 'Personal Information', and 'Administrators'. The main content area is titled 'Main Menu' and includes a welcome message: 'Welcome to the Dalhousie Online Information System! Last web access on Dec 04, 2007 at 01:18 pm'. Three menu items are listed: 'Web for Employees' (Personal Information, Job History, Benefit and Deduction History, Tax Forms - T4 Statement of Remuneration and TD-1), 'Personal Information' (Change your Personal Identification Number (PIN) and addresses, phone numbers, and e-mail addresses; and reset your NetID password), and 'Web for Administrators' (Query Budget and Encumbrance data and Update User role(s)). A blue callout box with the text 'Click on Web for Administrators' and a white arrow points to the 'Web for Administrators' link. At the bottom left, it says 'Return to Homepage' and 'RELEASE: 7.3 D1'.

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

The screenshot shows the 'DAL ONLINE (DEVL)' interface. At the top left is the Dalhousie University logo with the tagline 'Inspiring Minds'. The top right contains the text 'DAL ONLINE (DEVL)' and navigation links 'RETURN TO MENU | SITE MAP | HELP | EXIT'. Below the header is a navigation bar with 'Main Menu', 'Employees', 'Personal Information', and 'Administrators'. The main content area is titled 'Web for Administrators' and includes a 'Finance' section (Query Budget and Encumbrance data and view financial documents) and a 'Distributed Security' section (Administrative functions for assigning Orgn Unit security and Your Security). A blue callout box with the text 'Click on Distributed Security' and a white arrow points to the 'Distributed Security' link. At the bottom left, it says 'View your security profile.' and 'RELEASE: W4A VERSION 1.0'.

## 5. Determine if the delegate has an oracle ID – Click on **View an Employee's Security Profile**

The screenshot shows the 'DAL ONLINE (DEVL)' interface. At the top left is the Dalhousie University logo with the tagline 'Inspiring Minds'. The top right contains the text 'DAL ONLINE (DEVL)' and navigation links 'WEB FOR ADMINISTRATORS | SITE MAP | HELP | EXIT'. Below the header is a navigation bar with 'Main Menu', 'Employees', 'Personal Information', and 'Administrators'. The main content area is titled 'Distributed Security' and includes a 'View an Employee's Security Profile' section (View information pertaining to an employee's user profile, such as assigned roles and Organizations), 'Update Administrative Security Assignments' (Assign or revoke roles associated with organization security), and 'Query Security Assignments' (Query on Web for Administrators security assignments, by role or organization code). A blue callout box with the text 'Click on View an Employee's Security Profile' and a white arrow points to the 'View an Employee's Security Profile' link. At the bottom left, it says 'RELEASE: W4A VERSION 1.0'.

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6. Enter the Dalhousie ID (B00#) of the person being delegated access, click on the **Select User** button
  - a. If the Oracle ID states “no Oracle ID has been set up”, go to step 7
  - b. If the Oracle ID indicates an oracle id, go to step 8

**DAL ONLINE (DEVL)**

WEB FOR ADMINISTRATORS | SITE MAP | HELP | EXIT

Main Menu | Employees | Faculty, Advisors and Academic Administrators | Personal Information | **Administrators**

## Personal Security Profile

This page shows employment information and Web for Administrators roles and Organizational Security.

**Warning:** This employee needs to have an Oracle ID setup before you can assign any organization units to him/her. Please email [finance.web@dal.ca](mailto:finance.web@dal.ca) to action this request.

**Warning:** This person is not an active employee. Changes to this person's security profile can only be made by a Security Officer.

**Security Profile for Sa [REDACTED]**

Dalhousie ID:	B00 [REDACTED]
Oracle ID:	*** no Oracle ID has been set up ***
Finance Security Profile:	*** no FOBPROF record found ***

Check to see if individual has an oracle id. If they don't email [finweb@dal.ca](mailto:finweb@dal.ca) requesting an oracle id to be created.

7. Send an email to [finweb@dal.ca](mailto:finweb@dal.ca) requesting an oracle id to be created for the individual. Include in the email, the person's name & their Dalhousie ID. Once created, you will receive an email back indicating you may continue on in delegating access to the individual. At this point, you repeat steps 2-4 and then go to step 9.

8. Click on **Web for Administrators** in the top right hand corner.

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

**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 associated with organization security

**Query Security Assignments**  
Query on Web for Administrators security assignments, by role or organization code

Click on Update Administrative Security Assignments

RELEASE: W4A VERSION 1.0

# How to Delegate Spending Authority on Research accounts via Web for Administrators

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

**DAL ONLINE (DEVL)**

Update Administrative Security Assignments

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

Dalhousie ID:

Continue Reset

RELEASE: WEB FOR ADMIN, R2

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

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

Update Administrative Security Assignments - Windows Internet Explorer

https://dalonline.devl.dal.ca/DEVL/hyggkrolo.P\_UpdateRoles

Update Administrative Security Assignments

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 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] M [REDACTED] 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:

Save Changes Revoke

**Select Spending Authority**

This Employee is a Unit Authority for:

Orgn:	Title:	Status:
[REDACTED]	G [REDACTED]	Active
[REDACTED]	G [REDACTED]	Inactive
[REDACTED]	G [REDACTED]	Inactive
[REDACTED]	G [REDACTED]	Inactive
[REDACTED]	G [REDACTED]	Active
[REDACTED]	G [REDACTED]	Inactive
[REDACTED]	G [REDACTED]	Active


12. In the Orgn Code field, **enter the research account** the person identified is allowed to approve spending against, and then click on **Save Changes**. The default spending amount will be \$5,000.

# How to Delegate Spending Authority on Research accounts via Web for Administrators

B00 [REDACTED] 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	Spending Authority	Orgn Code:	
Maximum Amount:	5000		

 Enter an amount, if you want to grant Spending Approval to an unlimited dollar amount, then leave the field blank. Note that only Unit Authorities of Research grants are authorized to do this.

Save Changes

Reset All Fields

13. Repeat steps 11 & 12 for each research account you wish to delegate to the individual.

14. Exit Dal Online or click on the Distributed Security at the top of the screen and repeat steps 9 – 13 for the next person you would like to authorize to have spending authority on your account(s).

## For Transactions greater than \$5,000:

To delegate spending authority for transaction greater than \$5,000 to your Dean and/or Department Head, please follow the above steps, however at step 12 after you enter the research account in the **Orgn Code** field, select **Maximum** from the Maximum Amount drop down list and then click on the **Continue** button. An error message will appear if the Dalhousie ID entered is not your Dean or Department Head. Spending authority for transactions greater than \$5,000 can **ONLY** be granted to your Dean and/or Department Head.