



DALHOUSIE NOTES ON WEB FOR ADMINISTRATORS

QUICK REFERENCE

As of July 27, 2012

Quick reference document outlining the steps to grant someone access to organization codes (“accounts”) in Finance Self Service (FSS) and ePrint

What is Web for Administrators (W4A) – Distributed Security?

Web for Administrators – Distributed Security will allow Deans, Directors, Chairs, Department Heads, Principal Investigators, as well as, Administrators who have been delegated the Finance Security Administrator role to delegate access to Finance Self Service (FSS) and ePrint to others.

Who can be delegated access to FSS & ePrint through W4A - Distributed Security?

Any employee paid through Dalhousie, excluding those with a primary employee class for pensioner, courtesy access, exception id, and long term disability recipient. If someone belonging to one of these employee classes requires access, a request must be made to the Web for Administrator Security Officer. In the case of FSS & ePrint, that would be Lorelee Hawkes Ulrich in Financial Services.

If the person requiring access to FSS and ePrint are employees of some other organization, a “Terms and Conditions of Use for Web for Query/Reports Access” form will need to be completed by the individual, signed off by the Unit Authority for the orgns and fax to the Finance Security Officer in Financial Services (494-2848) for processing. To obtain a copy of this form, email finweb@dal.ca.

How do I delegate access to FSS & ePrint to someone through W4A - Distributed Security?

1. **Log in to Dal Online**
2. Click on **Web for Administrators**
3. Click on **Distributed Security**
4. Click on **Update User Administrative Roles**
5. Enter **Dalhousie id** of the person being delegated access, click **Continue** button
6. In the **Additional Role** drop down box, select the type of access to be granted:
 - a. **Query/Reports** – able to view financial information in FSS & ePrint

- b. **Spending Authority** – able to view financial information in FSS & ePrint and able to sign off on invoices and journal entries up to and including spending authority amount. This role can only be delegated by the Researcher.
 - i. **\$5,000** – all individuals payrolled through Dalhousie
 - ii. **Maximum** – to the Department Head/Chair or Dean associated with the orgn. This is done by **leaving the Maximum Amount field blank**.
- 7. **Select the role**, enter the **orgn code** (5-digit account number) and click **Save Changes**.
- 8. System will indicate:
 - a. “Changes saved OK” – if the role has been saved.
 - b. **“The assignee must have an Oracle ID before you can assign this role. Please email finance.web@dal.ca requesting an Oracle ID be created for this person, be sure to include the person’s Dalhousie ID.”** – an oracle id is required for everyone with access to FSS. Please **send an email** as directed. Once the oracle id has been created, you will be notified and will need to start back at step 1.
- 9. Repeat step 7 for each orgn you wish for this person to have access to in Web for Administrators.

Once the access has been delegated, it will take a day or two for the person to have access to Web for Administrators. Financial Services needs to “turn on” the access to these individuals. The person will receive an email when there access has been established.

Any access granted to the person once the access has been established will happen once the role has been delegated.

What if someone already has access to FSS & ePrint but they need access to a new account?

If someone needs access to FSS and ePrint to a new “account” (orgn), either the Finance Security Administrator or Researcher can delegate Query/Reports to the person. Only the Researcher can delegate Spending Authority. They would follow the same steps above.

Once this has been done, the person will automatically have access to this new account.

NOTE: There is a yearly review process to done in November to make sure everyone who currently has access at that time should continue to have access or if the access is to be revoked.



DALHOUSIE NOTES ON WEB FOR ADMINISTRATORS

QUICK REFERENCE

As of July 27, 2012

Quick reference document outlining the steps to revoke someone's access to organization codes ("accounts") in Finance Self Service (FSS) and ePrint

When does a person's access to Finance Self Service (FSS) and ePrint need to be revoked through Web for Administrators (W4A) – Distributed Security?

When a person has left the University, changed departments, and changed jobs, their access would need to be revoked. The same would apply for those who have access but are not Dalhousie employees.

Who's responsibility is it to revoke a person's access?

It is the responsibility of the following people to ensure access has been revoked when a person no longer requires access to FSS and ePrint:

- Principal Investigator (Researcher),
- Finance Security Administrator for the department/faculty, or
- The Dean/Director/Chair/Department Head when no Finance Security Administrator has been delegated to that area.

The Web for Administrator Security Officer will not know when a person no longer requires access to FSS and ePrint.

When should the access be revoked?

The access to FSS & ePrint should be revoked through Web for Administrators – Distributed Security on the person's last day. Once Payroll has the person marked as "not an active employee", the only person to revoke the access is the Web for Administrator Security Officer. In this case, an email should be sent to finweb@dal.ca requesting the person's access be revoked. Included in this email should be the person's full name, Dalhousie ID (B00#) and what needs to be revoked and why (eg. person left the University).

How do I revoke access?

The following are the steps to revoking someone's access to FSS and e-Print through Web for Administrators:

1. **Log in to Dal Online**
2. Click on **Web for Administrators**
3. Click on **Distributed Security**
4. Click on **Update User Administrative Roles**
5. Enter **Dalhousie ID** of the person having their access revoked, click on **Continue** button
6. If you are authorized to revoke an organization code, you will see the **Revoke** button on the right side of the line.
7. Click on the **revoke button**. The line will disappear and the person no longer has access to this account.
8. Repeat step 7 for all orgns that should be removed from this person's access.

Note: In the majority of cases, the Security Administrator for the department/faculty is the Administrator.