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.

3. Click on Web for Administrators
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4. Click on Distributed Security

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

7. Send an email to 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**
10. Enter the Dalhousie ID (B00#) of the delegate and click on the **Continue** button.

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

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.
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.