
Drexel Web*Salary

User Guide and FAQs

September, 2014

Introduction

The Web*Financials suite helps you track all aspects of your department's finances. It allows you to monitor and manage your budgets, salaries, and merit increases online. Web*Financials is comprised of several smaller tools:

Web*Finance	a tool to manage and track all financial transactions within an organization
Web*Salary	a tool that allows administrators to manage and track their department's salaries
Web*Telephone	a tool to show usage and line charges, including usage detail

Based on your access, different tools will be available to you within Web*Financials.

This guide is for **Web*Salary only**.

Logging In

Once your access has been confirmed, go to

<http://www.drexel.edu/webfinancials>

You will be required to enter the following information:

- **User name**
- **Password**
- **Institution**

User name

- This is your DrexelOne userid and your E-mail id
- It is usually a combination of letters and numbers, ex. abc123
- This is NOT your 8 digit University ID, which usually begins with a 1 or 6

Password

*Follow the instructions below to activate your Web*Financials account and obtain your password*

- Open Internet Explorer and go to <http://accounts.drexel.edu>
- Enter your user ID and password for either your Drexel email or Drexel domain account. The system defaults to the Drexel email.
- Click on the <Activate> Link in the Activated column next to the Web*Finance Host system. You will be prompted to acknowledge an end user license agreement.

If this is your **first** account in Web*Financials or the administrative **Banner** application, the system will generate a **temporary** password, which can only be used the same day it is picked up. If you do not log in within the time frame, the password will expire and you will have to e-mail drexel_finsec@drexel.edu to have your password reset.

Banner and Web*Financials use the same username and password. If you already have a Web*Financials or Banner account, the password will remain the same.

Institution

You will be required to select one of the following :

- Drexel (includes DUCOM beginning in FY15)
- DUCOM (through FY14)
- Academy of Natural Science

This refers to the account providing funds for the organization.

Changing your Password

- Your Web*Financials password is set to expire every 56 days.
- If you login 3 days before the expiration date, you will be prompted to change your password.
- If you login after the expiration date, you will be prompted to email drexel_finsec@drexel.edu
- If you enter an incorrect password three times, the system will lock your login for one hour.
- If you have forgotten your password, email drexel_finsec@drexel.edu and you will be contacted to reset your password via a phone call.

Changing your Password

- Your Web*Financials password is the same as your Internet Native Banner (INB).
- If you change your password in one, you change it **both** applications.

NOTE: INB ACCESS IS NOT THE SAME AS BANNERWEB, WHICH YOU ACCESS VIA THE DREXELONE PORTAL.

Reviewing Your Organization's Information

- When you select the **Web*Salary** option, you will be directed to the Main Menu, where you will choose one of the following options:
 - Fiscal Position Summary **Fiscal Position Summary**
 - Fiscal Detail Display **Fiscal Detail Display**
 - Department Roster **Departmental Roster**
 - Leave Balances **Leave Balances**
- Select one of these options based on the data that you would like to review.

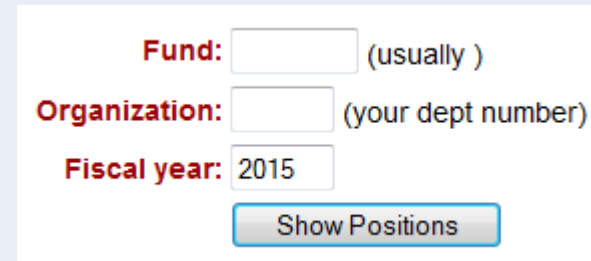
Fiscal Position Summary

To display your position summary page, you must enter an organization number. The organization number is your department number.

The general fund for each institution might be different:


- Drexel: 110100, 110001
- DUCOM: 110000, 110100
- ANS: 110001

You may enter this value or another fund code. Click 'Show Positions' to view data.



The screenshot shows a web form with three input fields and a button. The first field is labeled 'Fund:' in red text, followed by an empty text box and the text '(usually)'. The second field is labeled 'Organization:' in red text, followed by an empty text box and the text '(your dept number)'. The third field is labeled 'Fiscal year:' in red text, followed by a text box containing the value '2015'. Below these fields is a button with the text 'Show Positions'.

Fiscal Position Summary

<p>Fund: 110001 Unrestricted Organization: 3000 Finance and Treasurer Finance Manager: Smith, John</p>	<ul style="list-style-type: none">• Fund Number and Description• Organization Number and Description• Fund Manager
<p>Fiscal year: 2014 Periods: Year to date</p>	<ul style="list-style-type: none">• Selected Fiscal Year
<p>Download summary </p>	<ul style="list-style-type: none">• Click to save or open an Excel version of the page data

Fiscal Position Summary Header

Click on any item in the blue header area for item definitions


Account Number	Account Code for which the position is under.
Position #	Position number for which the activity has taken place.
Position Title	Title for the position in which the activity has taken place.
Adjusted Budget	Adjusted budget amount for the position. This is the amount that this position is funded for the Cost Center and Account for the current fiscal year.
YTD Activity	Total paid against this position, Cost Center, and Account Code.
Encumbrances	Remaining balance of the encumbrance for the particular Position, Cost Center and Account Code.
Remaining	Remaining balance left for the particular position. This is calculated by the formula: Position Budget - YTD Activity - Encumbrances.

$$\text{Adjusted Budget} - \text{YTD Activity} - \text{Encumbrances} = \text{Remaining}$$

***Encumbrances:** A Salary Encumbrance is the reservation of budgeted dollars for costs associated with a specific position. As funds are expended for the position, the encumbrance is reduced or liquidated.

Person Summary Page

On the Position Summary page, click on a Position Number to view the Person Summary Page, this will show the name of the person hired for the selected position.

<p>Fund: 110001 Unrestricted</p> <p>Organization: 3000 Finance and Treasurer</p> <p>Finance Manager: Smith, John</p> <p>Position: 111111 Exec Dir, Admin & Finance</p> <p>Adjusted Budget: \$100,000.00</p> <p>Encumbrance: \$100,000.00</p>	<ul style="list-style-type: none">• Fund Number and Description• Organization Number and Description• Fund Manager• Position Number and Description• Adjusted Budget• Encumbrance
<p>Fiscal year: 2014</p> <p>Periods: Year to date</p>	<ul style="list-style-type: none">• Selected Fiscal Year
<p>Download summary</p> 	<ul style="list-style-type: none">• Click to save or open an Excel version of the page data


Person Summary Page Header

Click on any item in the blue header area for item definitions.

Name	Name or names of the persons in that position charged to the particular Position, Cost Center and Account.
Person ID	ID Number for the person or persons in the particular Position, Cost Center and Account Code.
YTD Activity	Total YTD activity for the person or persons in the particular Position, Cost Center and Account Code.
Encumbrances	Remaining amount calculated to be paid to the particular person until the end of the current fiscal year against the particular Position, Cost Center and Account Code.

Person Detail Page

Click on a person's name to display more details. The **Personal Detail Page** shows detail on how many times employee was paid and when he/she started to get paid.

<p>Fund: 110001 Unrestricted</p> <p>Organization: 3000 Finance and Treasurer</p> <p>Finance Manager: Smith, John</p> <p>Position: 111111 Exec Dir, Admin & Finance</p> <p>Name: Robertson, Mary</p>	<ul style="list-style-type: none">• Fund Number and Description• Organization Number and Description• Fund Manager• Position Number and Description• Name of the person in the position
<p>Fiscal year: 2014</p> <p>Period: Year to date</p> <p>Account Code: 2222 Regular Admin Salaries Full Time</p> <p>Person ID: 10000000</p>	<ul style="list-style-type: none">• Selected Fiscal Year• Period• Account Code• Person's University ID
<p>Download summary</p> 	<ul style="list-style-type: none">• Click to save or open an Excel version of the page data

Person Detail Page Header

Click on any item in the blue header area for item definitions.

Pay Cycle	This is whether the person was paid on the "WK" Weekly (Drexel only), "BW" Bi-Weekly or "MO" Monthly.
Pay No	Number of the pay based upon the calendar year, not the fiscal year. For example, MO pay 1 would be the Monthly Pay for January.
Pay Year	Calendar year for the pay event.
Pay Amount	This is the amount of the pay transaction.
Encumbrance Amount	This is the amount of the encumbrance transaction.

Pay Period Detail Page

On the Personal Detail Page, select a pay period to the Pay Detail Page to review transaction details.

Transaction Date	Transaction date for the event from the Banner2000 Human Resource System.
Pay Cycle	This is whether the person was paid on the "WK" Weekly (Drexel only), "BW" Bi-Weekly or "MO" Monthly.
Pay No	Number of the pay based upon the calendar year, not the fiscal year. For example, MO pay1 would be the Monthly Pay for January.
Pay Year	Calendar year for the pay event.
Rucl_Code	Finance Rule Class: <ul style="list-style-type: none">• HENA: Encumbrance Adjustment• HENC: Original Encumbrance• HGNL: Gross Pay, No Liquidation• HGRS: Gross Pay, Liquidate and Encumbrance
Pay Hours	Number of hours attributed to pay event.

Pay Period Detail Page

Pay Hours	Number of hours attributed to pay event.
Source	<p>Source of the transaction, for an encumbrance transaction, HENA, HENC, this would be the position number for the person.</p> <p>For pay events, the source would be the earnings code used for the pay.</p> <ul style="list-style-type: none"> • 010: Straight Overtime • 015: Regular Overtime • ADR: Adjustment at Regular Earnings • ADS: Adjustment at Special Rate • BON: Bonus • DOC: Unpaid Leave (Dock Pay) • EXP: Extra Pay • FUN: Funeral Pay • HOL: Holiday Pay • JUR: Jury Duty • LFP: Leave With Pay • LLB: Leave w/ Benefits w/o Pay • LLO: Leave With No Pay / No Benefit • LPP: Leave with Part Pay • NCS: Non City Wages - Special Rate • NCY: Non City Wages • REG: Regular • RET: Retro Pay • RG1: Regular • RPR: Prior Year • SEV: Severance Payment • SIC: Sick/Illness • TXD: Taxable Disability Replacement • VAC: Vacation/Personal • VAP: Vacation Payout
Pay Amount	Amount of the pay transaction.
Encumbrance Amount	Amount of the encumbrance transaction.

Fiscal Detail Display

Fiscal Detail Display shows summary of all fiscal activity for the department. Use this section to access records of any of the information listed in the Fiscal Position Summary.

To display your position summary page, you must enter a fund and organization number. The organization number is your department number.

The general fund for each institution is different:

- Drexel: 110100, 110001
- DUCOM: 110000, 110100
- ANS: 110001

You may enter this value or another fund code.
Click 'Show Positions' to view data.

Fund:	<input type="text"/>	(usually)
Organization:	<input type="text"/>	(your dept number)
Fiscal year:	<input type="text" value="2015"/>	
<input type="button" value="Show Positions"/>		

Fiscal Detail Display Page Header

Click on any item in the blue header area for item definitions.

Name	The first and last name of the employee.
ID	The ID of the employee.
Position	Position number for which the activity has taken place.
Position Title	Title for the position in which the activity has taken place.
Account	Account Code for which the position is under.
Year	Calendar year for the pay event.
Pay Type	Payroll cycle on when the person was paid. For example, "BD" Drexel Bi-Weekly or "MD" Drexel Monthly.
Pay Number	Number of the pay based upon the calendar year, not the fiscal year. For example, MD pay 1 would be the Monthly Pay for January.
Pay Amount	This is the amount of the pay transaction.
Encumbrance Amount	This is the amount of the encumbrance transaction.

Department Roster

A roster displays current active faculty and staff who are associated with or who have salary dollars being distributed to the department.

To display your Departmental Roster you must enter an organization number. The organization number is your department number.

Organization: (your dept number)

Show Roster

Department Roster Page Header

Click on any item in the blue header area for item definitions.

Name	Name of the person in the department.
Person ID	ID Number for the person.
Position Id	Position Number for the Job.
Ecls	Employee Class.
Job Title	Title of the job.
Job End	End date for the job.
	Status of the Job
J	• A - Active
S	• B - Leave with Pay
	• L - Leave without Pay
	• P - Partial Pay
	• S - Sabbatical
Home Dept	Home Department for the employee.

Department Roster Page Header

Click on any item in the blue header area for item definitions.

%	Percentage of the salary charged to the entered organization. If the home organization of the employee does not match the entered organization, the % column will be null.
Unrestricted	Amount of the salary presently allocated to the Unrestricted Funds. This does not reflect the amount charged to Unrestricted Funds.
CPG	Amount of the salary presently allocated to Faculty Practice Funds. This does not reflect the amount charged to Faculty Practice Funds.
Restricted	Amount of the salary presently allocated to Restricted Funds (including Research Funds). This does not reflect the amount charged to Restricted funds.
Other	Amount of the salary presently allocated to Other (Designated, Plant) Funds. This does not reflect the amount charged to Other funds.
Total	Total salary allocated to the entered organization

Labor Distribution Page

Clicking on a job title to show employee's labor distribution.

Click on any item in the blue header area for item definitions.

Fund	Fund to which the labor distribution is being charged.
Fund Title	Description of the fund to which the labor distribution is being charged.
Orgn	Organization to which the labor distribution is being charged.
Orgn Title	Description of the organization to which the labor distribution is being charged.
Acct	Account code to which the labor distribution is being charged.
Acct Title	Description of the account to which the labor distribution is being charged.
%	Percentage of the salary for the job that is charged to the Cost Center and Account Code.

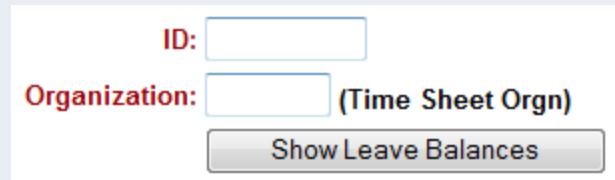
Leave Balances

Leave Balances displays an employee's leave history.

You may view Leave Balances in one of two ways:

1. Enter a SSN or University ID to view an individual's information.
2. Enter a Time Sheet Org Code to view all Leave Balances for a Orgn Code.

Click "Show Leave Balances" to see details.



The screenshot shows a search interface with two input fields and a button. The first field is labeled "ID:" and is empty. The second field is labeled "Organization:" and contains the text "(Time Sheet Orgn)". Below the second field is a button labeled "Show Leave Balances".

ID:

Organization: (Time Sheet Orgn)

Show Leave Balances

Leave Balance Page Header

Click on any item in the blue header area for item definitions.

Name	The first and last name of the employee.
ID	The ID of the employee.
Adjusted Service Date	The date that the employee became eligible for benefits.
Leave Code	Code for the type of Leave.
Leave Desc	Description of the Leave type.
Begin Balance	The starting balance of leave hours for the current fiscal year.
Accrued	The amount of leave hours accrued for the current fiscal year.
Taken	The amount of leave hours used so far during the current fiscal year.
Current Available	The number of leave hours currently available for use.

Personal Action Forms

Personnel Action Forms are available through Web*Salary and are used to implement changes to an employee's job records.

Personnel Action Forms can be used for the following situations:

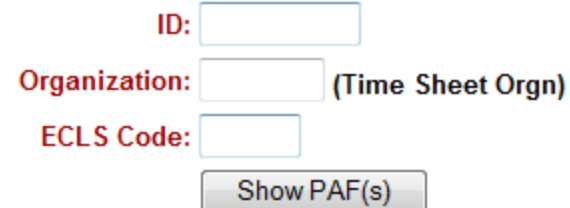
Promotion	Termination
Demotion	Shift Code Change
Wage Adjustment	Leave of Absence
Department Transfer	Return from Leave of Absence
Job Title Change	Workers Compensation
Status Change	Return from Workers Compensation
Hours Change	Location Code Change

Open Personal Action Forms

You may view PAF's in one of three ways:

1. Enter a User ID, University ID or SSN to view an individual PAF
2. Enter a Time Sheet Org Code to view all PAF's for a Orgn Code
3. Enter an ECLS Code and Time Sheet Org Code to view all PAF's for a particular ECLS and Orgn Code.

Click "Show PAF(s)" to form details.



The screenshot shows a web form with three input fields and a button. The first field is labeled 'ID:' and is empty. The second field is labeled 'Organization: (Time Sheet Orgn)' and is empty. The third field is labeled 'ECLS Code:' and is empty. Below the fields is a button labeled 'Show PAF(s)'.

When you want to make one of these changes, simply check the corresponding box at the top of the page, and then mark the changing information on the bottom part of the form. Once HRIS has processed your PAF, you should see these changes on a new PAF in Web*Salary.

More on PAFs <http://www.drexel.edu/hr/management/staffing/pafs/>

Personnel Action Form Guide:

http://www.drexel.edu/~media/Files/hr/guides/epafs/PAF_Guide.ashx

FAQs

I was prompted to change my password and I thought I did successfully but now I can't log in with the new one?

If the password was not accepted by the system, the old password may still be in place. Try logging in again with the old password and make sure that the new password follows the required convention:

- Between 6 and 16 characters long*
- First character must be a letter*
- Must have at least 1 number and 2 letters*
- # and _ are the **ONLY** specials characters allowed*

System Outages

Web*Financials is **NOT available Sunday mornings from 2am to 6am for backups.**

Sundays from 6am to Noon is reserved for software and hardware maintenance.

If no maintenance is scheduled, Banner will be available. If maintenance is scheduled, an announcement will be made by end-of-day of the preceding Wednesday.