

Drexel University Web\*Financials

# Web\*Salary

User Guide and FAQs

9/3/2014

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## 1. 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**.

## 2. Logging In

Once your access has been confirmed, you can go to [www.drexel.edu/webfinancials](http://www.drexel.edu/webfinancials) to log in. You will be required to enter the following information:

**User name:**

**Password:**

**Institution:**  Drexel (includes DUCOM beginning in FY15)  
 DUCOM (through FY14)  
 Academy of Natural Sciences

**User name:** This is your DrexelOne userid and your E-mail id, 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\*Salary account and obtain your password

- 1) Open Internet Explorer and go to <http://accounts.drexel.edu>
- 2) Enter your user ID and password for either your Drexel email or Drexel domain account. The system defaults to the Drexel email (Drexel.edu)
- 3) 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](mailto:drexel_finsec@drexel.edu) to have your password reset.

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/Drexel University College of Medicine/Academy of Natural Science. This refers to the account providing funds for the organization.

### 3. Changing your Password Change Password

Your Web\*Salary 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](mailto:drexel_finsec@drexel.edu).

If you enter an incorrect password three times, the system will lock your login for one hour. If you remember your login, you may try after the lockout expires. If you have forgotten your password, email [drexel\\_finsec@drexel.edu](mailto:drexel_finsec@drexel.edu) and you will be contacted to reset your password via a phone call.

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 DREXEL ONE PORTAL.**

### 4. Reviewing your Organizations' Information Web\*Salary

When you select the Web\*Salary option, you will be directed to the Main Menu, where you will choose one of the following options:

#### 4.1 Fiscal Position Summary Fiscal Position Summary

##### 4.1.1 Open Fiscal Position Summary Page

Required fields are shown in **red**. Fields shown in **black** are optional.

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

**Fund:**  (usually )  
**Organization:**  (your dept number)  
**Fiscal year:**

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

### 4.1.2 Position Summary Page

Selected Information Appears at the top of the Page:

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<b>Fund:</b> 110001 Unrestricted	• Fund Number and Description
<b>Organization:</b> 3000 Finance and Treasurer	• Organization Number and Description
<b>Finance Manager:</b> Smith, John	• Fund Manager (if any)

---

<b>Fiscal year:</b> 2014	• Selected Fiscal Year
<b>Periods:</b> Year to date	

---

<a href="#">Download summary</a> 	• Click to save or open an Excel version of the page data
---	---

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### Account Summary Table Header

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

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

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

**Adjusted Budget – YTD Activity – Encumbrances = Remaining**

**You can also view the department totals for each of these categories in this section.**

**\*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.

### 4.1.3 Person Summary Page

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

Selected Information Appears at the top of the Page:

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<b>Fund: 110001 Unrestricted</b>	• Fund Number and Description
<b>Organization: 3000 Finance and Treasurer</b>	• Organization Number and Description
<b>Finance Manager: Smith, John</b>	• Fund Manager
<b>Position: 111111 Exec Dir, Admin &amp; Finance</b>	• Position Number and Description
<b>Adjusted Budget: \$100,000.00</b>	• Adjusted Budget
<b>Encumbrance: \$100,000.00</b>	• Encumbrance

---

<b>Fiscal year: 2014</b>	• Selected Fiscal Year
<b>Periods: Year to date</b>	

---

<a href="#">Download summary</a> 	• Click to save or open an Excel version of the page data
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### Person Summary Page Header

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

<b>Name</b>	Name or names of the persons in that position charged to the particular Position, Cost Center and Account.
<b>Person ID</b>	ID Number for the person or persons in the particular Position, Cost Center and Account Code.
<b>YTD Activity</b>	Total YTD activity for the person or persons in the particular Position, Cost Center and Account Code.
<b>Encumbrances</b>	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.

### 3.1.4 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.

---

**Fund: 110001 Unrestricted**

**Organization: 3000 Finance and Treasurer**

**Finance Manager: Smith, John**

**Position: 111111 Exec Dir, Admin & Finance**

**Name: Robertson, Mary**

- Fund Number and Description
- Organization Number and Description
- Fund Manager
- Position Number and Description
- Name of the person in the position

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**Fiscal year: 2014**

**Period: Year to date**

**Account Code: 2222 Regular Admin Salaries Full Time**

**Person ID: 10000000**

- Selected Fiscal Year
- Period
- Account Code
- Person's University ID

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[Download  
summary](#)



- Click to save or open an Excel version of the page data
- 

#### Person Detail Page Header

<b>Pay Cycle</b>	This is whether the person was paid on the "WK" Weekly (Drexel only), "BW" Bi-Weekly or "MO" Monthly.
<b>Pay No</b>	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.
<b>Pay Year</b>	Calendar year for the pay event.
<b>Pay Amount</b>	This is the amount of the pay transaction.
<b>Encumbrance Amount</b>	This is the amount of the encumbrance transaction.

#### 4.1.5 Pay Period Detail Page

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

#### Pay Period Detail Page Header

<b>Transaction Date</b>	Transaction date for the event from the Banner2000 Human Resource System.
<b>Pay Cycle</b>	This is whether the person was paid on the "WK" Weekly (Drexel only), "BW" Bi-Weekly or "MO" Monthly.
<b>Pay No</b>	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.
<b>Pay Year</b>	Calendar year for the pay event.
<b>Rucl_Code</b>	Finance Rule Class: <ul style="list-style-type: none"><li>• HENA: Encumbrance Adjustment</li></ul>

	<ul style="list-style-type: none"> <li>• HENC: Original Encumbrance</li> <li>• HGNL: Gross Pay, No Liquidation</li> <li>• HGRS: Gross Pay. Liquidate and Encumbrance</li> </ul>
<b>Pay Hours</b>	Number of hours attributed to pay event.
<b>Source</b>	<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"> <li>• 010: Straight Overtime</li> <li>• 015: Regular Overtime</li> <li>• ADR: Adjustment at Regular Earnings</li> <li>• ADS: Adjustment at Special Rate</li> <li>• BON: Bonus</li> <li>• DOC: Unpaid Leave (Dock Pay)</li> <li>• EXP: Extra Pay</li> <li>• FUN: Funeral Pay</li> <li>• HOL: Holiday Pay</li> <li>• JUR: Jury Duty</li> <li>• LFP: Leave With Pay</li> <li>• LLB: Leave w/ Benefits w/o Pay</li> <li>• LLO: Leave With No Pay / No Benefit</li> <li>• LPP: Leave with Part Pay</li> <li>• NCS: Non City Wages - Special Rate</li> <li>• NCY: Non City Wages</li> <li>• REG: Regular</li> <li>• RET: Retro Pay</li> <li>• RG1: Regular</li> <li>• RPR: Prior Year</li> <li>• SEV: Severance Payment</li> <li>• SIC: Sick/Illness</li> <li>• TXD: Taxable Disability Replacement</li> <li>• VAC: Vacation/Personal</li> <li>• VAP: Vacation Payout</li> </ul>
<b>Pay Amount</b>	Amount of the pay transaction.
<b>Encumbrance Amount</b>	Amount of the encumbrance transaction.

## 4.2 Fiscal Detail Display 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.

### 4.2.1 Open Fiscal Detail Display

Required fields are shown in **red**. Fields shown in **black** are optional.

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

**Fund:**  (usually )

**Organization:**  (your dept number)

**Fiscal year:**

[Show Positions](#)

You may enter this value or another fund code.

Click 'Show Positions' to view data.

### Fiscal Detail Display Page Header

<b>Name</b>	The first and last name of the employee.
<b>ID</b>	The ID of the employee.
<b>Position</b>	Position number for which the activity has taken place.
<b>Position Title</b>	Title for the position in which the activity has taken place.
<b>Account</b>	Account Code for which the position is under.
<b>Year</b>	Calendar year for the pay event.
<b>Pay Type</b>	Payroll cycle on when the person was paid. For example, "BD" Drexel Bi-Weekly or "MD" Drexel Monthly.
<b>Pay Number</b>	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.
<b>Pay Amount</b>	This is the amount of the pay transaction.
<b>Encumbrance Amount</b>	This is the amount of the encumbrance transaction.

## 4.3 Department Roster **Departmental Roster**

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

### 4.3.1 Open Department Roster

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

<b>Name</b>	Name of the person in the department.
<b>Person ID</b>	ID Number for the person.
<b>Position Id</b>	Position Number for the Job.

<b>Ecls</b>	Employee Class.
<b>Job Title</b>	Title of the job.
<b>Job End</b>	End date for the job.
<b>J S</b>	Status of the Job <ul style="list-style-type: none"> <li>• A - Active</li> <li>• B - Leave with Pay</li> <li>• L - Leave without Pay</li> <li>• P - Partial Pay</li> <li>• S - Sabbatical</li> </ul>
<b>Home Dept</b>	Home Department for the employee.
<b>%</b>	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.
<b>Unrestricted</b>	Amount of the salary presently allocated to the Unrestricted Funds. This does not reflect the amount charged to Unrestricted Funds.
<b>CPG</b>	Amount of the salary presently allocated to Faculty Practice Funds. This does not reflect the amount charged to Faculty Practice Funds.
<b>Restricted</b>	Amount of the salary presently allocated to Restricted Funds (including Research Funds). This does not reflect the amount charged to Restricted funds.
<b>Other</b>	Amount of the salary presently allocated to Other (Designated, Plant) Funds. This does not reflect the amount charged to Other funds.
<b>Total</b>	Total salary allocated to the entered organization

#### 4.3.2 Labor Distribution Page

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

##### Labor Distribution Page Header

<b>Fund</b>	Fund to which the labor distribution is being charged.
<b>Fund Title</b>	Description of the fund to which the labor distribution is being charged.
<b>Orgn</b>	Organization to which the labor distribution is being charged.
<b>Orgn Title</b>	Description of the organization to which the labor distribution is being charged.
<b>Acct</b>	Account code to which the labor distribution is being charged.
<b>Acct Title</b>	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.
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#### 4.4 Leave Balances 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.

ID:

Organization:  (Time Sheet Orgn)

Click "Show Leave Balances" to see details.

#### Leave Balance Page Header

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

#### 4.5 Personal Action Forms Personnel 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
- Demotion

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

#### 4.5.1 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.

ID:

Organization:  (Time Sheet Orgn)

ECLS Code:

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

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

## 5. 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 special characters allowed

## 6. System Outages

Web\*Salary 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.