SMITHVILLE R-II
SCHOOL DISTRICT

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User Guide

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About Web Link

Web Link is an add-on module of the School Accounting System that allows designated users to access and complete various options within the School Accounting System via the Internet. With the Web Link module, users can be defined to do any of the following: enter purchase orders or requisitions, approve requisitions, enter cash receipts, view their check history, leave, and W2 information, generate reports, and complete an inventory of the assets entered in the Fixed Asset Inventory module in their assigned rooms.

There is a condensed version of Web Link for mobile devices that only includes the options for Check History and Leave Balance. The system tries to automatically detect if Web Link is being accessed from a mobile device, such as a smart phone, and will display the login screen for running the condensed version of Web Link, if applicable; however, the full desktop version can still be accessed from the mobile device if desired.

Logging In

1. Navigate to http://accweb/weblinksql/Login.aspx.

2. At the Web Link Login screen, enter your user ID for accessing Web Link (and the School Accounting System, if applicable) in the User ID field. The ID can be up to **10** characters long.

3. Enter your valid password for accessing Web Link (and the School Accounting System, if applicable) in the Password field. The password is case sensitive and can be up to **20** characters long.

   Note: If you forgot your password and are unable log into Web Link, click the "Forgot your password? Password Recovery" link (located under the **Login** button) to have the system reset your password and email you the new password (will be prompted to enter your User ID and an email address that must match one entered in the Employee File in the School Accounting System for your user). The "Forgot your password? Password Recovery" link only appears if the Allow Password Retrieval field is selected in the Web Link Setup Options option in the School Accounting System. If the "Forgot your password? Password Recovery" link does not appear on the login screen, a supervisor (in the Business Office) has the ability to reset your password from within the School Accounting System.

4. Click the **Login** button.

   Tip: If you receive a message stating that your account is locked out, contact the Business Office to have a supervisor "unlock" your user (IP Address).

   Note: The system tries to automatically detect if you are accessing Web Link from a mobile device, such as a smart phone, and will display the login screen for running the condensed version of Web Link, if applicable. The condensed version of Web Link only includes the options for Check History and Leave Balance. If desired, to run the full desktop version instead of the condensed version, click the **Desktop Version** link. If the system does not detect that you are accessing Web Link from a mobile device and you wish to run the condensed version, enter "Mobile" into the school district's website address for Web Link, just prior to "/Login.aspx" (for example, "http://SchoolDistrictWebServer/WebLinkSQL/**Mobile**/Login.aspx").

Logging Out

1. Save any changes before exiting Web Link.
2. Select the Logout option located in the upper right corner of the screen.
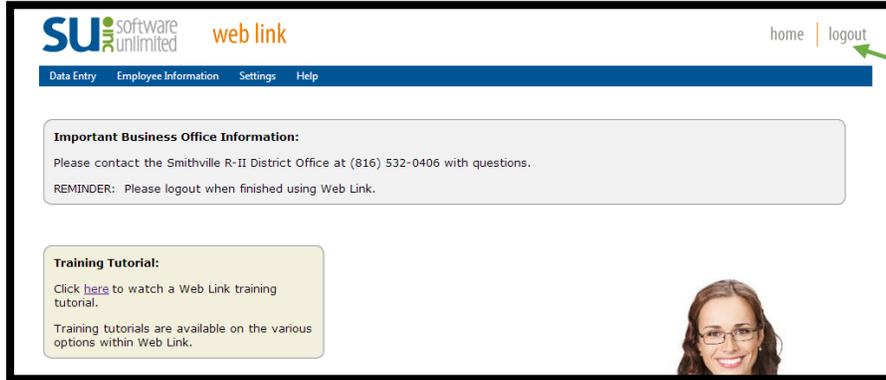
To ensure your User ID is not "locked" by the system, select the Logout option when your Web Link session is complete.

Change Password

The Change Password option is used to change a user's password to log into Web Link (and the School Accounting System, if applicable). Passwords can be changed at any time and should be changed on a regular basis. If desired, the system can be set up to require passwords to be changed after a certain number of days (defined in the Web Link Setup Options in the School Accounting System). The password, which is case sensitive, can be alphanumeric and up to **20** characters long (<u>cannot</u> be blank). In order to change a password, the old (or existing) password must be known.

Note: The following steps allow a user to change his or her password.

Tip: An alert stating "Password expires in ## days." will appear on the main Web Link screen above the Important Business Office Information section if user passwords for Web Link are defined to expire (as designated in the Web Link Setup Options in the School Accounting System) and the password for a user is within 10 days or less from expiring (the number of days will display as part of the message in place of ##). If applicable, click the alert to change the password and continue with Step 3 below.

1. Select the **Settings** menu and then **Change Password**.
2. The Change Password screen will appear.
3. Enter the existing password in the Current Password field.
4. Enter the new password (up to **20** characters long and <u>cannot</u> be blank) in the New Password field. The password is case sensitive, so be sure to note whether the password is keyed with or without caps.
5. Enter the new password a second time in the Repeat New Password field to verify the password was keyed correctly.
6. Click the Save button.
7. A message will appear stating the password has been changed; click **OK**.
8. The next time the specified user logs into Web Link (and the School Accounting System, if applicable), the new password must be entered.

Check History

The Check History option displays the payroll earnings information from posted checks and direct deposit stubs (excluding voided ones) issued in Payroll in the School Accounting System for the user (employee). With the Check History option, the checks and direct deposit stubs display only for the number of calendar years specified within the Web Link Setup Options option in the School Accounting System. The information for each check, including the check number, the check date, and the amount, will appear. If desired, a check or direct deposit stub can be selected in order to print a copy of the check (on plain paper with a "Copy" overlay) or to view the detail information included on the check.

Note: A user must be defined (within the School Accounting System) to have rights to view check history, or else the Check History option will <u>not</u> be available in Web Link.

<u>Viewing Check History:</u>

1. Select the **Employee Information** menu and then **Check History**.
2. The posted checks and direct deposit stubs (excluding voided ones) issued in Payroll for the user (employee) appear on the screen. Only the checks and direct deposit stubs within the number of calendar years specified in the Web Link Setup Options option in the School Accounting System display, with the most recent checks listed on the top. See **Diagram A**.
3. To print a copy of a check (on plain paper with a "Copy" overlay) or to view the detail information included on the check, click the **View** link located to the right of the desired check, or double-click on the desired check.

   Note: A PDF viewer, such as Adobe® Reader, must be installed on your computer prior to viewing (printing) a check; if you do <u>not</u> have a PDF viewer, download Adobe® Reader free of charge by clicking the **Get Adobe® Reader** button or going to http://get.adobe.com/reader/ and following the instructions.

4. Once the check displays on the screen, complete the print function as normal from within your Internet browser (for example, select the **File** menu and then **Print**) to print a hard copy of the check.

   Tip: To save the report as a file, select the **File** menu and then **Save As**; when prompted, specify the name and location of the report file, and then click the **Save** button.

Diagram A

Leave Balance

The Leave Balance option displays the balances of the leaves for the current year for the user (employee). With the Leave Balance option, the following data is shown for each leave set to display: the beginning balance, the total amount earned in the year, the total amount used in the year, and the ending balance. Also, the detail information from the entries for when the leaves were earned or used can be viewed. The leaves that appear within the option are defined to display within the Leave File in the School Accounting System, and can be overridden individually by employee on the Leaves screen in the Employee File in the School Accounting System, if needed.

Depending on whether the Display Unposted Leave Balances field is selected or unselected within the Web Link Setup Options in the School Accounting System, either just the posted entries for leaves will be included in the balances displayed in this option, or both posted and unposted entries will be included. Posted entries are those included in a payroll calculation batch that has been updated.

Note: A user must be defined (within the School Accounting System) to have rights to view leaves, or else the Leave Balance option will <u>not</u> be available in Web Link.

<u>Viewing Leave Balances</u>:
Note: A user must be defined (within the School Accounting System) to have rights to view leaves, or else the Leave Balance option will <u>not</u> be available in Web Link.

1. Select the **Employee Information** menu and then **Leave Balance**.
2. All the leaves that are set to display appear on the screen for the current year (based on the current date of the web server and the Start/End Dates of the leaves). See **Diagram A**.

   Note: Depending on whether the Display Unposted Leave Balances field is selected or unselected within the Web Link Setup Options in the School Accounting System, either just the posted entries for leaves will be included in the balances displayed in this option, or both posted and unposted entries will be included. Posted entries are those included in a payroll calculation batch that has been updated.
3. To view the detail information for a leave, click once on the desired leave.
4. To print the information, complete the print function as normal from within your Internet browser (for example, select the **File** menu and then **Print**).

Diagram A

W2s

The W2s option allows the user (employee) to view and print the W2 generated in Payroll in the School Accounting System. With the W2s option, the W2s for only the calendar years specified within the Web Link Setup Options option (in the School Accounting System) are available to view and print. With the W2s option, the W2s use the two W2s on page format (including one Copy B, one Copy C, and two Copy 2s), and also generate the instructions normally included on the back of a W2.

Note: In order for the W2s option to be available in Web Link, a user must be defined (within the School Accounting System) with the Employee ID field completed, and the desired calendar years must be selected in the Available W2 Years List in the Web Link Setup Options in the School Accounting System.

Viewing W2s:

Note: In order for the W2s option to be available in Web Link, a user must be defined (within the School Accounting System) with the Employee ID field completed, and the desired calendar years must be selected in the Available W2 Years List in the Web Link Setup Options in the School Accounting System.

1. Select the **Employee Information** menu and then **W2s**.

2. At the W2 Consent Terms screen (see **Diagram A**), review the terms for consenting to use the W2s option in Web Link at your district.

3. Complete the desired authorization option for using the W2s option and then click the **Continue** button.

   - Select "**I agree to the above Consent Terms and want to view and receive my W2 through Web Link only (no paper copy).**" option if you agree to the terms and want to only receive your W2 electronically through Web Link (and do not want a paper copy). This option will be selected by default if it was previously selected when viewing W2s in the past.

   - Select "**I want to continue receiving my W2 in paper form but would like to view my W2 through Web Link.**" option if you want to view your W2 electronically through Web Link and also receive a paper copy.

Diagram A

   Note: The W2 Consent Terms screen only appears the first time accessing the W2s option per session.

4. At the Print W2s screen, enter the **4-digit** calendar year for the W2 to view in the Year field, or click the **down-arrow** button to select the correct one.

5. Click the **View/Print W2** button to view the W2 on the screen, or else click the **Save W2** button to save the W2 as a .PDF file to a specified location on your computer. If desired, then complete the print function as normal from within your Internet browser (for example, select the **File** menu and then **Print**) to print a copy of the W2.

   Note: A PDF viewer, such as Adobe® Reader, must be installed on your computer prior to viewing (printing) a W2; if you do not have a PDF viewer, download Adobe® Reader free of charge by clicking the **Get Adobe® Reader** button or going to http://get.adobe.com/reader/ and following the instructions.

Diagram B