

WEB LINK MODULE

The Central Office is implementing a **Web Link Module** to allow you to:

- **Prepare on-line requisitions**
- **Verify your requisition status**
- **Verify inventory on-line**
- **View and print check history**
- **View leave balances**
- **View and print W2**

What does this mean for you?

If you complete purchase requisitions, you can enter requisitions on-line accessing a vendor list. You can review the status of the requisition.

You will have access outside of school for information you may want concerning your personnel information – employment information, employment dates, certificate expiration dates, wage information, and leave balance information.

How do I access the website?

You will find attached an instruction sheet explaining how to access the **Web Link Module**, the options available for you, and what reports you can print. **It is important for you to change your password after you initially log-in.** Click on settings in the dark blue bar and change your password. You should use a strong password including capital letters and numbers.

Additional Tips for Using Web Link:

You must have the web browser on your computer set to allow pop-up windows in order to use all functions in Web Link properly. In **Google Chrome**, if you try and view a past check stub you will see a message pop-up in the right-hand corner with a box and a red **X**. You will need to allow pop-ups from this website.

There are tutorial videos to help you maneuver in the **Web Link Module**. This is located on the home page in the **Training Tutorial** box.

When leaving the **Web Link Module** make sure you always log off (found at the upper right hand corner).

Where do I find the information once I am logged onto Web Link?

In the dark blue bar you will also see the items **Data Entry, Employee Information, Reports, Settings, and Help**. (You will need to make sure that you watch for the message to allow the pop-ups in the right hand corner when trying to view or print the reports.)


1. **Data Entry** – is available for those employees who need to complete requisitions. Please review the instruction sheet labeled **Requisition Instructions**.
2. **Employee Information** – in this section you can view:
 - a. Past pay checks – just click on **View** and it will show you your paystub. This is something I cannot reprint from my main payroll, but it does allow you, as the employee to view/print them. (**Reminder** - if you cannot see the stub, make sure you have allowed pop-ups from this site.)
 - b. Leave balances – if you click on a leave, the detail will be listed below. It will show the dates of leave taken and will also have dates of leave requested.
 - c. W-2s – **this will have your social security number on it, so you must be careful with your user name and password.**
3. **Reports** – listed on the instructions sheet are reports that you have access to print
4. **Settings** – this is where you will change your password
5. **Help** – you can research item you need help with


ALWAYS MAKE SURE YOU LOG OFF WHEN YOU ARE FINISHED.

If you want the W-2 option removed, you will need to agree to have all of the Employee Information removed since it is part of that section. Let me know if you want that option removed.

REQUISITION INSTRUCTIONS – WEB LINK

1. Requisition for Purchase
 - a. Click on **Data Entry**
 - b. Click on **Requisition Entry**

***NEW FEATURE -  (found at bottom of detail information) you can copy previous requisitions. **NOTE:** Please watch **dates, \$ amounts, and item #'s**, as these change from year to year or may have been incorrectly entered. You will need to know the old requisition #. You can find this by generating a [Requisition Listing – Detail](#) report.

- i. Fill in the following: (Please enter the information in all **UPPERCASE**)
 1. **Approval Tree ID** – select the correct one for what you are ordering
 2. **Requisition #** leave blank this will auto fill
 3. **Vendor ID** – you can find this by clicking on the  magnifying glass (If the vendor is not here, please email name, address and phone # to Kim and she will add it to your vendor group.)
 4. **Requisition amount** - leave blank this will auto calculate (see step 11)
 5. **Requisition Date** (orders for next school year enter ex: July 1, 2017)
 6. **Expected Date** (orders for next school year enter ex: July 1, 2017)
 7. **Requisition Description** orders for the **current** school year enter **FY 16-17** or enter **FY 17-18** for the next school year. (FY is July 1 – June 30)
 8. **Your Comment** add any additional information for approver(s) or accounts payable.
 9. Go to Detail Information section.

DETAIL INFORMATION SECTION:

1. **Detail Description** – make sure you include **all details** about the item(s) you are ordering in this field. *Note:* If there is a hard copy of an attachment, please note that here, **write the requisition # on the hard copy of the attachment** and send to the next person on your approval tree.

Supplies/Equipment - include name/title of item, size, color, discount codes, etc. Also enter LEEP APPROVED FOR (enter \$ amt.), if it's a LEEP purchase.

Subscriptions – title of magazine/newspaper, date you want it to start, your name, school, address, account # and any other information that would be beneficial.

Conferences/Hotels - if attending a conference/hotel, please include:





(**Note:** you will need to complete 2 separate requisitions for conference and hotel)

Name of Conference/Hotel

Date(s) of Conference/Hotel

Name(s) of individuals who will be attending/staying


- If **more than one account #** will be used, then you will need to go to the next row and enter the names.
- If several people are attending the same conference/hotel, please coordinate and assign one person to process the requisition.
- (**Note:** If there is a hard copy of an attachment, please note that here, **write the requisition # on the hard copy of the attachment** and send to the next person on your approval tree.)
- If attending a conference, specify who will register (Kim **OR** myself) if you indicate “myself” then Kim will issue a PO # and return to you via email or hard copy.

2. **ITEM #** (required field) – conferences use “CONF”, hotels use “HOTEL” and repairs use “REPAIR”, etc.
3. **Quantity** (required field)
4. **Unit Price** (required field)
5. **Unit Description** (required field) ex: DZ, EA, PKG, ROOM, CONF, REPAIR, etc.
6. **Amount** - will automatically fill in
7. If you are ordering **more than 1 item** from this vendor, please enter in the next row, if you are needing more rows, please click on the **+ Add Rows**.
8. **Discounts** – (if any) when done entering all of your items go to the next row and enter any vendor discount code #'s.
9. **Shipping** - when done entering all of your items/discount codes go to the next row and enter the word “**SHIPPING**” in the detail description field, **quantity** will be **1** and **amount** of shipping charges, if known otherwise enter 0.
10. Return to the top screen of this requisition.
11. Click on the  (calculator) to the right of the **Requisition Amount**. This will total all of your items for this requisition.
12. Review your requisition.
13. **SAVE** by clicking on the  icon.
14. **Completed Requisitions** – if done with this requisition click **submit current requisition**
OR
15. **Incomplete Requisitions** – if you will need to finish this requisition at a later date, click the  icon to save.
16. **Retrieving incomplete requisitions**, go back into **Requisition Entry** and click on the  (binoculars) next to the Requisition Number field to find the requisition that you need to complete or work on and follow the previous steps.

After you submit, you will be notified by email the status of your requisition.


If it is **approved**, it will move up the approval tree. You will be notified each step of the approval process. If the Superintendent approves the requisition, it will automatically move to Accounts Payable for a purchase order.

If your requisition is **rejected** at any point, you can proceed with #1 **or** #2:

1. Accept the rejection and no further action is required. (see **Deleting a Requisition** below)
2. Click on **Data Entry**
 - a. Click on **Requisition Entry**
 - i. Click on the  (binoculars) and choose the requisition rejected
 - ii. Edit any changes
 - iii. Submit the requisition again

Deleting a Requisition (if it was rejected and no further action is required or changed mind about ordering)

Select – **Data Entry**

Click on  (binoculars) and search for the requisition that you want to delete

Select – green ✓ mark

Once it shows up on your screen

Click on the red X to delete

NOTE: To see any requisitions that you have created/submitted, please see the “**Reports**” section and you can select reports #9 - #13 and refer to the first paragraph.

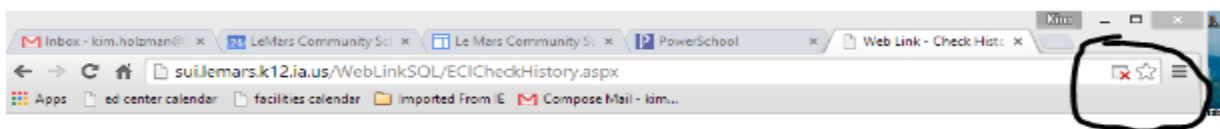
EMPLOYEE INFORMATION



When you click on **Employee Information**, you will see **3 options**: Check History, Leave Balance and W-2s.

1. If you click on **Check History**, you will see a list of checks by date. If you click on **view**, the adobe reader will allow you to view a copy of your paystub. You have to remember to **allow pop-ups** on this site.

If you have not allowed pop-ups, you will see a box with a **red x** in the upper right-hand corner.



You will need to right click and allow pop-ups on this site.

2. When you click on **Leave Balance** you will see the following:

Data Entry	Employee Information	Reports	Settings	Help		
Leave Balance						
Leaves						
Leave Description	Start Date ▼	End Date	Beginning Balance	Earned	Taken	Ending Balance
Sick	07/01/2014	06/30/2015	107.00	8.00	-7.50	107.50
Per.Leave	07/01/2014	06/30/2015	0.00	2.00	-2.00	0.00
Family Illness & Dep Illness	07/01/2014	06/30/2015	0.00	6.00	-1.00	5.00
Leave Detail						
Start Date ▼	End Date	Units	Comments			
05/15/2015	05/18/2015	-2.00				
07/01/2014	07/01/2014	2.00	Create New Year			

As you click on each leave balance, it will give you the detail of dates and amounts below. You will see future dates, if you had requested personal time prior to the date taken. This applies specifically to the certified staff. If for some reason, you did not take that day or plan on not taking the date listed, you will notify the Superintendent's Office to cancel a leave request.

3. The final item is the **W-2**. This will display an actual copy of your W-2 for the year you choose.
 - a. You will first need to consent to seeing your W-2
 - b. Next you will see a drop down box to choose the year
 - c. Click on either View/Print W-2 or Save W-2

YOU MUST REMEMBER YOUR SOCIAL SECURITY NUMBER WILL APPEAR ON THE W-2. THIS IS WHY IT IS VERY IMPORTANT THAT YOU DO NOT HAVE YOUR PASSWORD TO WEBLINK OUT FOR OTHERS TO SEE AND THAT YOU CHANGE FROM YOUR DEFAULT PASSWORD.

If you do not want to enable this option, you will not have the ability to see any Employee Information.

4. Other employee information can be seen through the report option.

REPORTS

A few of the reports you may have access to are listed below. You can either double click on the report name or highlight a report and click on the green check mark. For most reports, the only option you may want to change will be the date range. Otherwise, if you click on **copy choices** and **execute report**, the report will show up on your screen with the options to print or just view it.

1. Absences - Listing by Absence Date

Report Name: Absences Listing by Absence Date

Report Selection Description: Unposted ▼

Variable Fields:

Report Parameters:

Absence Date			
Batch Description			
Leave ID			
Start Date			

Sub Heading

Include PageHeader/Footer

- a. The first box – you have a choice of posted or unposted. Posted is any absence that has been used in the past. Unposted absences will include any future leave requests that you may have.
 - b. Other options are:
 - i. Specific Absence Dates
 - ii. Specific Batch Descriptions (ex: December 15, 2015 Certified Absences)
 - iii. Leave ID – if you tab through this, it will include all leave absences or you can choose just sick leave, personal leave or family leave.
 - iv. Start Date – or you can choose a date range.
2. Asset Report by Asset Description – You can ignore all the options in the report parameters. You have been signed a specific room so the report will only print inventory items in your room. You can just execute the report.
 3. Contract Verification – When you execute this report it will list your current contract information, leave summaries, current tax information (married or single, allowances, and/or any additional amount withheld). It will list any personnel information with dates.
 4. Employee Listing – Custom Date Field Information – This will specifically list any personnel dates the school tracks.
 5. Employee Listing – Custom Text Field Information – This report will list your building, room, certifications, folder number, lane, step and position.
 6. Employee Listing – Leave Information – This is a summary of the absence report in #1. You can select the date range.
 7. Employee Listing – Name and Address Information
 8. Employee Listing – Wage Information – This will list your contracts.
 9. Requisition Form – This report will allow you to print a past requisition form.
 10. Requisition Inquiry – This report will list all requisitions you have filled out.
 11. Requisition Listing – Detail – This report will list your requisitions w/ all of the details.
 12. Requisition Listing – Summary – This is a summary listing of all the requisitions you have made.
 13. Requisition Status Report – This will list the requisitions and the status of each one.
 14. Requisition Listing – Detail - This will list your requisitions with detail information.

FIXED ASSET INVENTORY

Completing Room Inventory (you will receive an email when this is open)

1. Select the **Data Entry** menu and then **Room Inventory**.
2. Click the **down-arrow** button to select the correct room to complete the inventory. Some of you will have more than one room.
3. All the current assets in the specified room (as recorded in the Fixed Asset Inventory module) appear on the screen.
4. To change the status and condition of the asset or enter comments for the asset, click the **Edit** link located to the left of the desired record and then complete the following:
 - Select **In Room** if the asset is still located in the room being inventoried.
 - Select **Missing** if the asset is no longer located in the room being inventoried.
 - Select **Moved** if the asset is no longer located in the room being inventoried and was permanently relocated to another room.
 - Select **Disposed** if the asset was disposed of and is no longer located in the room being inventoried.
 - Enter the condition of the asset in the Condition field, or click the **down-arrow** button to select the correct one.
 - Enter any additional information to track for the asset being inventoried in the Comments field. The comment can be alphanumeric and up to **1,000** characters long. (ex: if **moved** - where is it now, if **disposed** - put the date of disposal, if **missing** - include any information that might help find it)
 - After making the desired changes, click the [Save button](#).

Note: Only the Status, Condition, and Comments fields can be edited for an asset (unless the asset was manually added in Step 5 below and is not already recorded within the Fixed Asset Inventory module).

5. To add a new asset to the room, click the [Add New button](#) located at the bottom of the screen and then complete the following: **Note:** Some technology equipment may not be tagged, so please do not add that equipment.
 - Enter the tag number (ID number) for the asset in the Asset Tag field.

Note: If the asset tag number is recorded in another room in the Fixed Asset Inventory module, a message will appear; to inventory (add) the asset in this room, click **OK** and then continue adding the asset (only the Condition and Comments fields can be completed for the asset, as the other information will default in from the Fixed Asset Inventory module and cannot be changed).
 - The Status field will default to **New Asset** and cannot be changed.
 - Enter the description of the asset in the Description field. The asset description can be up to **40** characters long.

Note: To optimize sorting on printed reports, be sure to enter all descriptions consistently. For example, enter a 6-foot folding table as "Table, folding, 6 foot", a 10-foot cafeteria table with benches as "Table, cafeteria with benches, 10 foot", and a 15-foot boat-shaped conference table as "Table, conference, boat-shaped, 15 foot", so that all the tables are grouped together on reports.
 - Enter the quantity of the asset in the Quantity field. The default of **1.00** will appear, but can be changed. The quantity can be up to **14** digits long and will be rounded to **2** decimal places by the system if capable.
 - Enter the name of the manufacturer for the asset in the Manufacturer field, if known. The name of the manufacturer can be up to **50** characters long.
 - Enter the model number of the asset in the Model Number field, if applicable. The model number can be alphanumeric and up to **25** characters long.

- Enter the serial number of the asset in the Serial Number field, if applicable. The serial number can be alphanumeric and up to **25** characters long.
 - Enter the condition of the asset in the Condition field, or click the **down-arrow** button to select the correct one.
 - Enter the date the asset was purchased in the Purchase Date field. Use the **mm/dd/yyyy** format or click the [Calendar Search button](#) to select the desired date.
 - Enter any additional information to track for the asset being inventoried in the Comments field, if desired. The comment can be alphanumeric and up to **1,000** characters long.
 - Click the [Save button](#).
6. To delete an asset from the room (only applicable if the asset was manually added in Step 6 above), click the **Edit** link located to the left of the desired record and then click the [Delete button](#).
 7. To print a report of the inventory for the room, click the **Print Report** button.

Note: A PDF viewer, such as Adobe® Reader, must be installed on your computer prior to running the report; if you do not have a PDF viewer, download Adobe® Reader free of charge by going to <http://get.adobe.com/reader/> and follow the instructions.

8. Once all the assets in the room have been inventoried (the status assigned), select the Room Inventory Complete field located at the bottom of the screen (a checkmark will appear in the box if the field is selected). When prompted to close the inventory for the room, click **OK**. The name of the user and the date the inventory for the room was closed appear to the right of the Room Inventory Complete field.

Tip: If needed, the inventory for a room can be reopened by selecting the Room Inventory Complete field to remove the checkmark.