**Data Entry**

\*    Requisition Entry

**TO USE THE NEW WEBLINK ENHANCED PLATFORM, MAKE SURE "NEW EXPERIENCE" TOGGLE IS ON AT THE EMPLOYEE'S HOME PAGE**

Requisition Entry:



Click on the drop-down for "**New**." The employee will be required to select the appropriate approval tree.  See "Appendix A" for help on the approval tree to select.

PART I:

**VENDOR**: search for the Vendor

Use UNKNOWN if there is a new vendor not in the system (Leave notes in the Comment Box for business manager to establish the new vendor or if you have not decided which vendor to use)

**DATE**: Today's date

**EXPECTED DATE**:  Today's date. However, for summer order input 07/01/20XX

**DESCRIPTION**: Brief description of the order. EX: SUPPLIES, EQUIPMENT, CURRICULUM, REGISTRATION, FEE or etc.

**SHIP TO:** Select the building location you work in.  For summer orders, the shipping will default to the DISTRICT office. Go ahead and still select your building location.

**EMPLOYEE ID**: Automatically prefill to the employee's ID

Click "**Save and Continue**"

**\*\*\*CLICK "SAVE" ANYTIME TO AVOID LOSING DATA\*\*\***

Part II:

**Add Comments (If Needed):**
Use this section to leave important notes for administrators or business managers. This is especially helpful for:

- Indicating if expenses are paid using specific funds (for example, "X" grant).
- Notifying the business manager of a new vendor that needs to be added to the vendor list.

Part III:

| Details | | | | | | | |
|---|---|---|---|---|---|---|---|
| Description | Item Number | Quantity | Unit Price | Unit Description | | Amount | URL |
| | | | | | | 0.00 | 🗑 |
| | | | | | | 0.00 | |

**DETAIL DESCRIPTION:** Description of the item you are purchasing.  Be as descriptive as possible. This will help the business office check in items. (EX. EXPO Dry Erase Marker, Chisel Point, Assorted Color – 36 pk)

**ITEM NUMBER:** Input this information if given. This will help the vendor know what you are purchasing.

**QUANTITY:** Quantity of item

**UNIT PRICE:** Price of item

**UNIT DESCRIPTION:** This will depend on the detailed description. Are the items sold by the Dozen, Each, Box, Pack, Oz, lb….etc) or Can be left blank if you do not know.

**AMOUNT:** Total Cost of Item (Quantity times Unit Price for each line)

**URL:** Very helpful if staff can provide this information. Amazon order is a prime example a URL link is useful. Input the URL link for each item.

Part IV:

**DOCUMENTS** – (*Bottom of page and center*):  Upload invoices, quotes, and support documents you have regarding the requisition. - Optional

Click "**Save**"

"**Submit**" when finished

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**HOW TO MAKE SURE REQUSITIONS ARE SUBMITTED**:

On the Main Screen of the requisition, you will see the status of all your requisitions.



| Number | Vendor | Date ↓ | Amount | Docs | Status | PO Number | |
|---|---|---|---|---|---|---|---|
| ☐ MS-0615 | AMAZON CAPITAL SERVICES, LLC | 03/03/2026 | 12.60 | ☐ | Unsubmitted | | ... |
| ☐ HS-1588 | UNKNOWN VENDOR FOR REQUISITION | 03/03/2026 | 100.00 | ☐ | Unsubmitted | | ... |
| DST-1042 | POWERSCHOOL CORPORATION | 03/03/2026 | 1,000.00 | ☐ | Pending | | ... |
| DST-1043 | CASEY'S BUSINESS MASTERCARD | 03/03/2026 | 35.26 | ☐ | Pending | | ... |
| DST-0105 | AMAZON CAPITAL SERVICES, LLC | 06/16/2023 | 219.95 | ☑ | Approved ✓ | DST-0105 | ... |
| DST-0039 | AMAZON CAPITAL SERVICES, LLC | 04/19/2023 | 31.72 | ☐ | Approved ✓ | DST-0039 | ... |
| DST-0040 | STAPLES ADVANTAGE | 04/19/2023 | 45.52 | ☐ | Approved ✓ | DST-0040 | ... |

**Unsubmitted** = Employee has **NOT** submitted to get the approval process started

**Pending** = Approval process has started, but is partially approved through the approval tree

**Approved** = Fully approved and will get processed by the business manager

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# Approval Tree – Appendix A

| # of Approvals | Elementary | Middle School | High School | Activity | SPED | Special Programs | District |
|---|---|---|---|---|---|---|---|
| 1 | Principals | Principals | Principals / Admin Facilitator | Activities Director | SPED Director | Curriculum Director | Business Mgr |
| 2 | Business Mgr | Business Mgr | Business Mgr | Business Mgr | Business Mgr | Business Mgr | Superintendent |
| 3 | Superintendent | Superintendent | Superintendent | Superintendent | Superintendent | Superintendent | |

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