



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/weblinksq/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.

The screenshot shows the Web Link Login interface. At the top left is the logo for 'SU software unlimited' and 'web link'. Below this is a blue horizontal bar. The main content area is divided into two sections. On the left is a light yellow box titled 'web link login' containing two input fields labeled 'user id' and 'password', a 'Login' button, and a link for 'Forgot your password? Password Recovery'. On the right is a section titled 'Important Business Office Information:' with the text 'Please contact the Smithville R-II District Office at (816) 532-0406 with questions.' Below this text is a white box with the text 'Any messages from Central Office will appear here.' and a green arrow pointing upwards towards the contact information.

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 to 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.

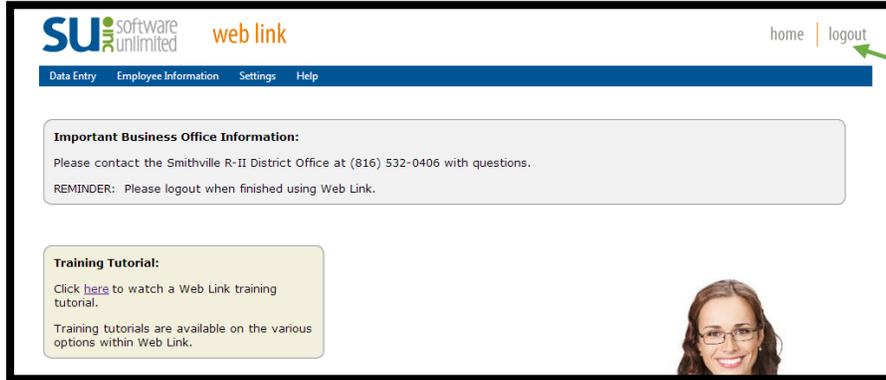
4. Click the **Login** button.

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 (cannot 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 cannot 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.

Requisition Status

The Requisition Status option is used to view and check the approval status of the requisitions that have been entered and submitted. The Requisition Status option only displays the requisitions entered by the user currently logged into the system. Changes cannot be made to requisitions from within the Requisition Status option.

Note: A user must be defined (within the School Accounting System) to have rights to enter requisitions or the Requisition Status option will not be available in Web Link.

Viewing a Requisition within Requisition Status:

Note: Changes cannot be made to requisitions from within the Requisition Status option. A user must be defined (within the School Accounting System) to have rights to enter requisitions or the Requisition Status option will not be available in Web Link.

1. Select the **Data Entry** menu and then **Requisition Status**.
2. The Requisition Status screen will appear listing all requisitions that have been entered by the user currently logged into the system, excluding those that have been converted to purchase orders or cancelled; change the filters as needed to view the desired requisitions, including those that have been converted to purchase orders or cancelled. See **Diagram A**.
3. Select the requisition for which to view the status by clicking once on the Requisition Number.
4. The approval information will appear in the Approvals List (on the bottom of the screen) for the selected requisition. For each approval sequence (as based on the approval tree assigned to the requisition), the following information appears: whether the user approved or rejected the requisition, the name of the user who actually completed the approval process for the sequence, the name of the user who was listed as the primary user for the particular approval sequence, the name of the user who was listed as the alternate (if applicable), and the date the approval sequence was completed.
5. If applicable, the comments for the selected requisition will also appear in the Comments List (on the bottom of the screen). The system will display the comments, the name of the user who entered the comments, and the date the comment was entered (or updated).

Req Num	Vendor Name	Req Date	Amount	Approved	Rejected	Submitted	Cancelled	PO Num
15	Office Professional, The	02/04/2013	79.90	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Approvals						
Approved	Rejected	Actual	Primary	Alternate	Sequence	Result Date
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Becky Sampson	Becky Sampson		1	02/04/2013
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Carolyn Smith	Carolyn Smith		2	02/04/2013
<input type="checkbox"/>	<input type="checkbox"/>		William Johnson		3	

Comments		
Comments	User Name	Date Updated
Envelopes available in the Business Office	Carolyn Smith	02/04/2013

Diagram A

Requisition Approvals

The Requisition Approvals option is utilized by designated users to approve requisitions that have been submitted for approval. The approval process for requisitions follows the hierarchy (approval sequences) as defined with the approval trees assigned to the requisitions.

If the system is set up to send notification emails for requisitions (in the Requisition Options option in the School Accounting System), upon approving or rejecting requisitions, emails will be sent to the users with the next approval sequences as the requisitions flow through the approval trees, the users who submitted the requisitions once completely processed (received final approval or rejected), and the users who are designated to receive an email for requisitions that received final approval.

Note: A user must be assigned to an Approval Sequence (User ID field completed) on an approval tree in the School Accounting System or the Requisition Approvals option will not be available in Web Link.

Approving Requisitions:

Note: A user must be assigned to an Approval Sequence (User ID field completed) on an approval tree in the School Accounting System or the Requisition Approvals option will not be available in Web Link.

1. Select the **Data Entry** menu and then **Requisition Approvals**.
2. In the Approval Type field, enter the type of approvals (**Alternate Approvals**, **Approval Tree Owner**, or **Regular Approvals**) to view and process, or click the **down-arrow** button to select the correct one. To view the requisitions currently awaiting approval from you (the user logged into the system), enter **Regular Approvals**. To view the requisitions awaiting approval from others for which you are designated as an alternate approver (as defined in the Alternate User ID field for approval trees), enter **Alternate Approvals**. To view all the requisitions awaiting approval for which you are the owner (as defined in the Approval Tree Owner ID field for approval trees), enter **Approval Tree Owner**. The default of **Regular Approvals** will appear, but can be changed. See **Diagram A**.

Note: The requisitions that display for Regular Approvals or Alternate Approvals include only those which are currently at your sequence on the approval tree or the alternate user's sequence (if applicable); the requisitions that are awaiting approvals from other users for other sequences on the approval trees will not appear unless the Show All Sequences field is selected (see below).

Requisition Approvals

Approval Type: Regular Approvals | Show All Sequences:

User ID: [Dropdown]

Click the **Approve/Reject** link to approve or reject a requisition.

Requisitions Awaiting Approval/Rejection						
Reg Num	Vendor Name	Created By	Req Date	Expctd Date	Amount	Comments
Approve/Reject 13	Adams Book Co	Kathy Jackson	11/15/2012	11/30/2012	903.21	
Approve/Reject 14	International Foods	Julia Anderson	11/18/2012	11/30/2012	21.65	
Approve/Reject 15	Office Professional, The	Carolyn Smith	11/12/2012	11/15/2012	79.90	Needed ASAP

Click on the desired requisition to view the details on the requisition.

Requisition Details													
Print	Post	Acct Number	Description	Catalogue	Cost Center	Quantity	Unit Price	Unit Desc	Amount	Bids	Bud Bal Tot	Sub Bal Tot	Fund Bal Tot
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10 0000 2510 000 0000 610	#10 Envelopes w/o window; 500 in box	901-WW10ES		10,0000	7.9900	Each	79.90	3	7,568.00	79.90	

Approvals						
Approved	Rejected	Actual	Primary	Alternate	Sequence	Result Date
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Becky Sampson	Becky Sampson		1	11/13/2012
<input type="checkbox"/>	<input type="checkbox"/>		Carolyn Smith		2	
<input type="checkbox"/>	<input type="checkbox"/>		William Johnson		3	

Comments		
Comments	User Name	Date Updated
Needed ASAP	Carolyn Smith	11/12/2012

Diagram A

3. Only if the Allow Show All Sequences for Approvals field in the Requisition Options option in the School Accounting System is selected, the Show All Sequences field appears to the right of the Approval Type field. If applicable, select the Show All Sequences field to display all requisitions pending approval from you including those that are currently awaiting approval from other users first for other sequences on the approval trees. A checkmark will appear in the box if the field is selected.

Tip: Select the Show All Sequences field if you will soon be gone for a period of time and would like to approve requisitions that will be moving through the approval process and needing your approval before your return.

4. If Alternate Approvals is selected as the Approval Type, enter the ID of the user for which you are an alternate and want to view the requisitions pending that user's approval in the User ID field, or click the **down-arrow** button to select the correct user.
5. Complete the approval process for the desired requisitions:

- a. To view the details included on a requisition, click on the desired requisition in the Requisitions Awaiting Approval/Rejection List located at the top of the screen; the details for the selected requisition will then display in the Requisition Details List in the middle of the screen.

Tip: The budget balance (including the total of unposted invoices, unposted purchase orders, and approved requisitions for the particular account number, if applicable) will display in the Requisition Details List for each detail line item included on a requisition; if the account number is in a fund defined as an activity fund, the appropriate fund balance will also display. Also, the total of all submitted requisitions that have not yet been approved for the particular account number (including the detail line items on the current requisition) will display. If applicable, to view the bids or quotes received from other vendors for the purchase of the goods or services included in the line item on the requisition, click the **Bid Detail** button for the Bids field.

- b. To approve a requisition, complete the following:

- Click the **Approve/Reject** link located to the left of the desired requisition.
- The Approvals Edit screen will appear showing all the detail information for the selected requisition. See **Diagram B**.
- If needed, the account number for a line item on a requisition can be changed or completed at this time (only if the Post to GL field is selected). If applicable, click the **Edit** link located to the left of the desired line item, enter the account number to be expensed for the line item in the Account Number field (or click the **Search** button to select the correct one), and then click the **Save** button.

Note: If the account number is changed for a line item on a requisition, "Account Number(s) Changed" will be added as a comment in the Comments field for the requisition.

- If desired, enter a comment to track for approving the requisition in the Comments field. The comment can be up to **1,000** characters long. If a comment was previously entered by the user, the previous comment will appear, but can be changed.
- Click the **Approve** button.

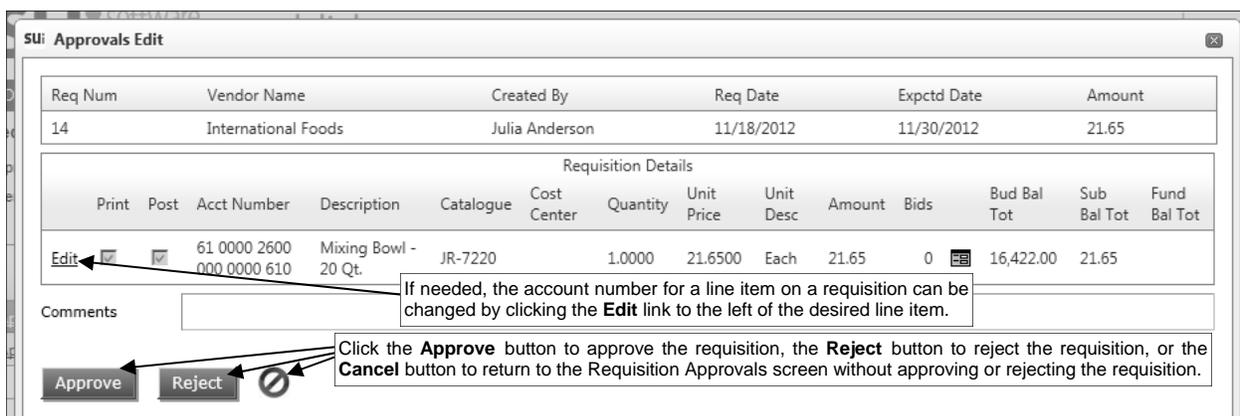


Diagram B

c. To reject a requisition, complete the following:

- Click the **Approve/Reject** link located to the left of the desired requisition.
- The Approvals Edit screen will appear showing all the detail information for the selected requisition.
- If desired, enter a comment to track for rejecting the requisition in the Comments field. The comment can be up to **1,000** characters long. If a comment was previously entered by the user, the previous comment will appear, but can be changed.
- Click the **Reject** button.

Note: If approving requisitions out of the normal order of an approval tree by using the Show All Sequences field (only applicable if **Regular Approvals** or **Alternate Approvals** is selected as the Approval Type), the requisitions will still be pending for the other users with approval sequences preceding and following your sequence. If approving as the owner of the assigned approval trees (**Approval Tree Owner** is selected as the Approval Type), the requisitions will be considered fully processed and will not require approval from other users on the approval tree. If a requisition is rejected by one approver on the approval tree, the requisition will not proceed to the next approval sequence on the approval tree, and will instead be sent back to the submitter.

6. If designated to do so in the Requisition Options option, a notification email will be sent at this time to the user who submitted the requisition, the user with the next approval sequence as based on the approval tree assigned to the requisition, and/or the user who is designated to receive an email for requisitions that received final approval.

Note: If there were notification email messages that did not go through, an error will be tracked in the Activity Log option (on the System Log tab) in the School Accounting System. If an email is rejected, the rejection notice will be sent to the email address entered in the From Email Address field in the Requisition Options option.

Reports

The Reports menu allows a user to print a report. Only the reports that are designated for the specific user within the User Security option in the School Accounting System are accessible to be printed in Web Link.

When generating reports in Web Link, the Payroll reports (and Negotiations reports, if applicable) containing employee information will only include data for the user currently logged into Web Link; and the Accounts Payable reports containing purchase orders or requisitions will only include data the user entered, unless the user has rights to approve requisitions.

Note: A user must be defined (within the School Accounting System) to have rights to reports in Web Link, or else the Reports menu will not be available in Web Link.

Printing a Report:

Note: Only the reports that are designated for the specific user within the User Security option in the School Accounting System are accessible to be printed in Web Link. Any Payroll reports (and Negotiations reports, if applicable) containing employee information will only include data for the user currently logged into Web Link.

1. Select the **Reports** menu.

Note: A user must be defined (within the School Accounting System) to have rights to reports in Web Link, or else the Reports menu will not be available in Web Link.

2. At the Report Search screen, select the report to print by: 1) double-clicking on the desired report, 2) clicking on the report once and then clicking the **Select** button, or 3) clicking on the report once and then pressing the **Enter** key. If all the available reports do not appear on the Report Search screen, advance to the page on which the desired report is included by clicking the **First Page**, **Previous Page**, **Next Page**, or **Last Page** button, or clicking the appropriate page number. If desired, change the filters to modify the reports displayed on the search screen. See **Diagram A**.

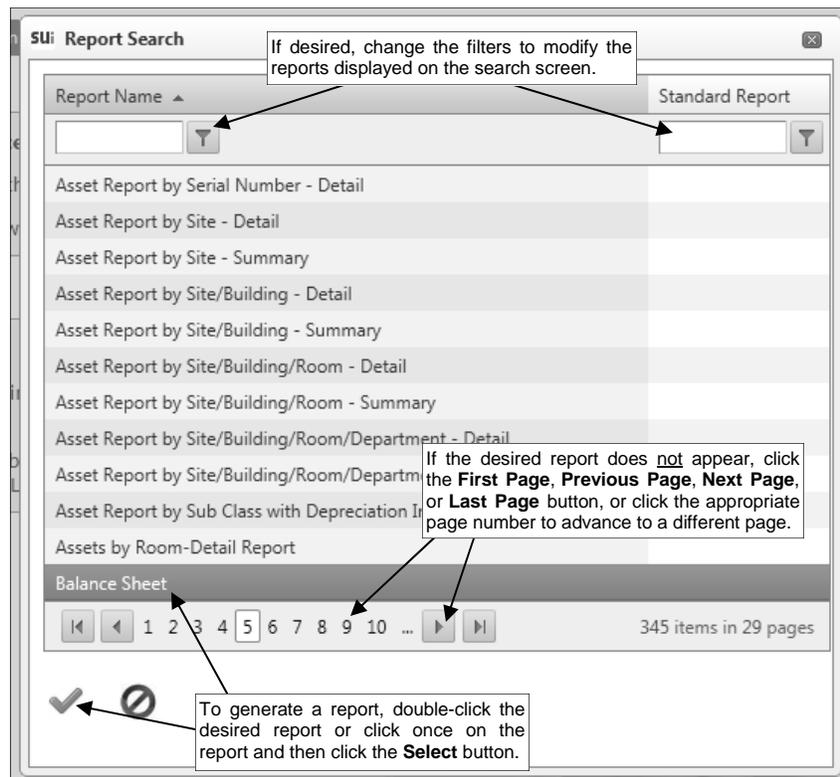


Diagram A

Tip: To sort the reports in ascending or descending order by a particular field (column), click on the column heading (label) for the desired field; an up or down arrow will appear to the right of the field indicating the order of the reports (ascending or descending).

3. Complete the required report printing options, if applicable.
 - a. If applicable, specify the desired type of the report to print in the Report Selection Description field. For example, when printing the Balance Sheet in General Ledger, select either **Monthly** or **Annual**, depending on which type of balance sheet to print. The default report selection will appear in the Report Selection Description field but can be changed by clicking the **down-arrow** button and selecting the correct one. See **Diagram B**.
 - b. If applicable, specify the variable values for each field listed in the Variable Fields section to determine what information to print on the report. When entering the value for a date, month, or year variable field, use the format of **mm/dd/yyyy** for a date, **mm/yyyy** for a month, or **yyyy** for a year; **be sure to key the slashes (or dashes), if applicable**.

The screenshot shows a software interface for report printing. At the top, there are tabs for 'Data Entry' and 'Employee Information'. Below this is a header bar with the text: 'After completing the desired report printing options, click the **Execute Report** button to preview the report on the screen in a PDF file format.' Below the header is a section titled 'Report Printing Options' containing three buttons: 'Execute Report', 'Copy Choices', and 'Clear Parameters', along with a 'Get ADOBE READER' icon. The main area is titled 'Report Name: Balance Sheet'. It includes a 'Report Selection Description' dropdown menu set to 'Monthly'. Under 'Variable Fields', there is a 'Processing Month' input field with '02/2013'. The 'Report Parameters' section has three rows: 'Accounts to Include', 'Active Chart of Account Number', and 'Fund Number', each with two input boxes. To the right of the 'Fund Number' input boxes are search icons and the number '10'. Below these is a 'Sub Heading' field containing the text 'Monthly; Processing Month 02/2013; Fund Number 10;'. At the bottom, there are two checkboxes: 'Print Negative Numbers in Red' (unchecked) and 'Include PageHeader/Footer' (checked). Three callout boxes with arrows point to specific elements: one to the 'Execute Report' button, one to a search icon, and one to the 'Copy Choices' button.

Diagram B

- c. If applicable, specify the ranges or select only certain records for each field listed in the Report Parameters section to determine what information to print on the report. To select the desired records to include on the report for the parameter fields, complete one of the following:

- Click the **Search** button to select specific records. To select a record to include on the report, click the box in the first column located to the left of each desired record. A checkmark will appear in the box if the record is selected. To select all the records listed on the screen, click the box located in the first column at the top of the screen (to the left of the other column headings). If desired, change the filters to modify the records displayed here. After all the desired records are selected, click the **Select** button. When using the **Search** button, only the records applicable for the other specified selections will appear (for example, if a particular account type has been specified on a General Ledger report, only the account numbers of the particular account type will appear when clicking the **Search** button for the Chart of Account Number parameter).

Tip: If desired, while searching, click the **Selected Rows First** button to view all the selected records on the first page(s) of the search screen.

Note: If the **Search** button is used to select specific records, the number of records selected will appear to the right of the button on the report printing options screen (or if the description of the selected records will fit in the space allotted for the display, the description of those selected records will display instead).

- Enter the desired starting record to include on the report in the From field (first input box located to the right of the desired item) and the ending record to include in the To field (second input box located to the right of the desired item). If the parameter field is for a date

or month, use the format of **mm/dd/yyyy**; **be sure to key the slashes (or dashes)**. If the parameter field is for an account number, **be sure to key the spaces between the account dimensions**.

- Enter the records to include on the report using the wildcard characters (% or _) as placeholders in your variable search information for the parameters in the From field. Use the percent sign (%) as a placeholder for an unlimited number of characters and the underscore (_) as a placeholder for one character. For example, enter **G%** in the From field for a Vendor ID parameter to print all vendors defined with an ID starting with the letter G.
- Enter the particular range of records to include using a "z". To print a range, enter the beginning information of the first records to print in the range in the From field for the desired parameter; then in the To field for that parameter, enter the beginning information of the last records to print in the range followed by a "z" at the end of the string. For example, to print all vendors defined with an ID starting with letters A through H, enter **A** in the From field for a Vendor ID parameter and enter **H z** in the To field.

Tip: If items have been selected for the parameters, click the **Clear Parameters** button, if desired, to clear the selections so that all records are selected for each item.

- d. If desired, enter a description to use as a sub title for the report in the Sub Heading field. The sub heading can be up to **255** characters long.

Tip: Click the **Copy Choices** button to automatically copy the selections made to the report, such as the specified Report Selection and selected parameters, into the Sub Heading field.

- e. Select the Print Negative Numbers in Red field to have the numeric values that are negative on the report appear in red on the preview screen and print in red (provided a color printer is utilized). A checkmark will appear in the box if the field is selected. The Print Negative Numbers in Red field will be selected by default if the Print Negative Numbers in Red field is selected within the User Options option or the User Security option in the School Accounting System for the specified user.
 - f. Select the Include Page Header/Footer field to print the information included in the Page Header and Page Footer sections on the report. A checkmark will appear in the box if the field is selected. This field will be selected by default. Typically, this field is only unselected if the report will be exported to a format in which the page header and page footer sections should be omitted, such as when exporting to a Microsoft® Excel spreadsheet file.
4. Click the **Execute Report** button to preview the report on the screen in a PDF file format.

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 clicking the **Get Adobe® Reader** button or going to <http://get.adobe.com/reader/> and following the instructions.
 5. Once the report 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 report.

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.