Web Link
Data Entry (**Requisition Entry**) Instructions

Web Link Address:  https://wl.sui-online.com/MarshallC2IL

**Data Entry (Requisitions)**

A separate requisition must be created for each vendor that you are requesting items from.  The Requisition Entry option can also be used to edit (and resubmit), cancel, or delete rejected requisitions.

Select the **Data Entry** menu and then **Requisition Entry**:



1.  **Approval Tree:** For most people, this will be prefilled.  If you order for multiple locations, choose the appropriate approval tree from your list of options.
2.  **Requisition Number**:  required, but will be **auto-assigned** when you **save** your requisition.
3.  **Vendor ID**:  required. See diagram above
        Choose your vendor.  If you can't find the vendor you need, call or email Molly.
4.  **Requisition Amount**:  required.  It is not necessary to enter an amount now if you don't know the total yet.  You can click on the calculator icon at any time and it will figure the requisition total.  You can do this either as you are adding items or when you are finished.  It will require a correct total before you can save and submit.
5.  **Requisition Date**:  required.  Enter the current date.
6.   **Expected Date:**  required.
        •   Enter 7/1 + the year if the requisition is for the next school year**.  (Example: 7/1/2021 for the 21-22 school year)**
        •   Enter the current date if the requisition is for the current school year.

7. **Ship To Address ID**: required.  This field auto populates based on your login.  If you order for multiple locations, choose the appropriate location from your list of options.
8. **Employee ID**: required.  This field auto populates based on your login.
9. **Detail Lines:**  required.  <span style="color:red">Each item you are requesting needs to be entered on a separate detail line</span>.  The entry screen populates with ten rows.  If you are requesting more than ten items, you can add more rows by clicking on the gray **+** sign by "Add Rows", located at the top left of the Detail Information box.



- **Account Number –** Click in the box under the Account Number heading – then click on the magnifying glass icon to get a drop down list of available account numbers.  (Some might only see one or two options here)  Choose and double click.
    - **Tip:** Account number descriptions that start with:
        - M/S = Materials and Supplies
        - P/S = Purchased Services
    (If you have questions about selecting the correct account, please contact Molly)
- **Detail Description –** Enter the specific name/description of the item requested.
  This box will expand as you type, so enter details such as color, size, set of 2, etc.  <mark>This information will appear on the purchase order that we eventually submit to the vendor, so please try to be as accurate as possible</mark>.  Using the item name/description from the catalog or website is preferred.
- **Item Number –** Enter the **item number** of the item requested.
    - For items that do not have an item number please use an asterisk**, \***
- **Quantity –** Enter the quantity of the item requested.
- **Unit Price –** Enter the unit price of the item requested.
- **Amount –** Will auto-populate based on quantity and unit price as you tab through.
- **URL -** This is especially important if you are ordering from Amazon.  Please include a link to either the item page or to a wish list that is shared.  (*Directions for creating a public wish list on Amazon are at the end of this document*)
- **If you know the shipping charge, please add a detail line for SHIPPING**
    - Enter the account number.
    - Enter the word "shipping" in the detail description.
    - If you know the exact cost of shipping, enter 1 in the **Quantity** box and enter the amount of the shipping in the **Unit Price** box.
10. **Comments:** optional.  You can add comments to your requisition if you feel you need to provide additional information.  Comments may also be added by approvers as your requisition is moved through the approval process.  All comments can be viewed in the Comment box.
11. **Total:** Click the calculator at the top of the page to add the total to the requisition

12. **Save:** Click on the **Save** icon at the bottom left.  Make sure to click **Save** before you submit.  This will assign your requisition number.  If you are not ready to submit your requisition, you will be able to log out of Web Link and return at a later time to finish and submit.
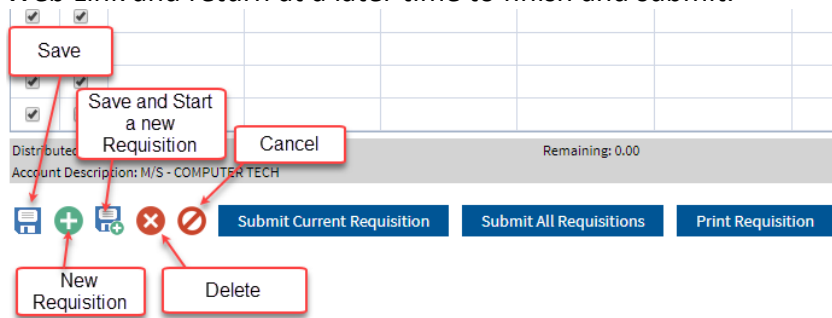


*To re-open a saved requisition*:
- Select the **Data Entry** menu and then **Requisition Entry**.
- Click on the binoculars next to the **Requisition Number** field.
- A search box will open listing your saved requisitions.
- Double click on the **Requisition Number** of the requisition you want to continue.  The requisition will open in the entry screen.  Make any additions or adjustments to your requisition.  (Make sure to hit save if you make any changes)

13. **Important Final Step!!:**  If you are ready to submit your requisition, click on the **Submit Current Requisition** button at the bottom.  You should get a message box that states "Requisition was successfully saved and submitted".  Click **OK.**  You also have the option to submit all saved requisitions at one time by clicking on the **Submit All Requisitions** button.

**Local Purchases –**

If you typically have a budget for local purchases throughout the year for labs, create a requisition with Local Purchases as the Vendor.  You do not need to list individual items, simply create one line with "Local Purchases" and a brief description of purchases in the Detail Description, 1 in the Quantity field, and the total amount as the Unit Price.  You do not need to add shipping for this requisition.
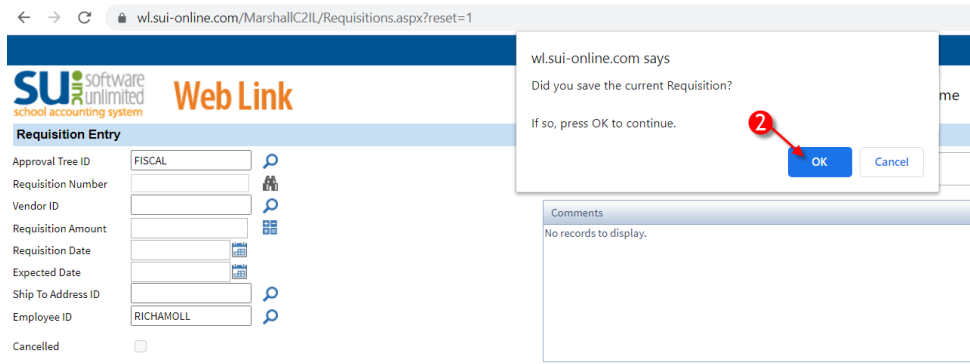
# Copy requisition from previous year:

Within Web Link, select the **Data Entry** menu and then **Requisition Entry**.

1. Click the **Copy Requisition** button at the bottom of the screen.
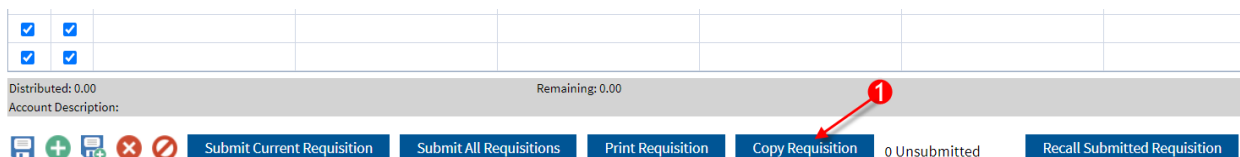
2. A message will pop up asking if you have saved the current requisition. Click **OK.**



3. Click the binoculars next to the Old Requisition Number box. This will open up a listing of all the requisitions you have submitted in the past. Double click on the one that you want to recreate.
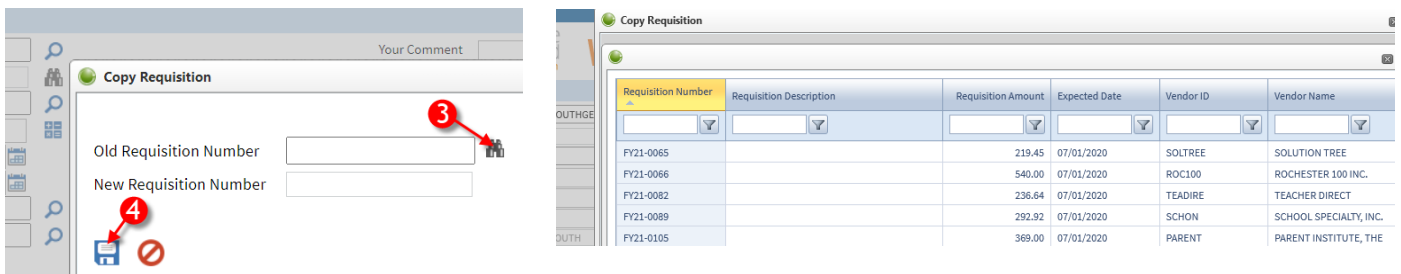


4. Click the **Save** icon. (You will **NOT** fill out the New Requisition Number. This is automatically assigned by the system) The old requisition is now copied into a new requisition and can be edited as needed for the new request.
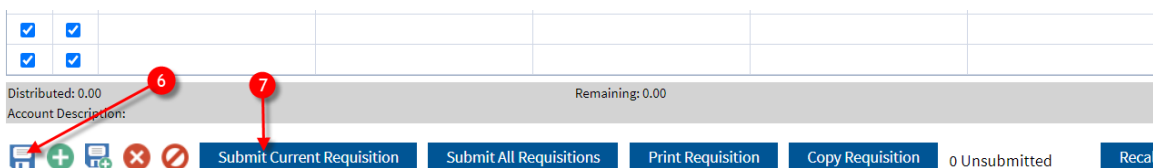
5. **\*\*\*VERY IMPORTANT\*\*\***

   Please make sure to change your **DATES**!

   • Requisition Date: **current** date

   • Expected Date: **must be 7/1/21**
     (If this is a request for next school year)
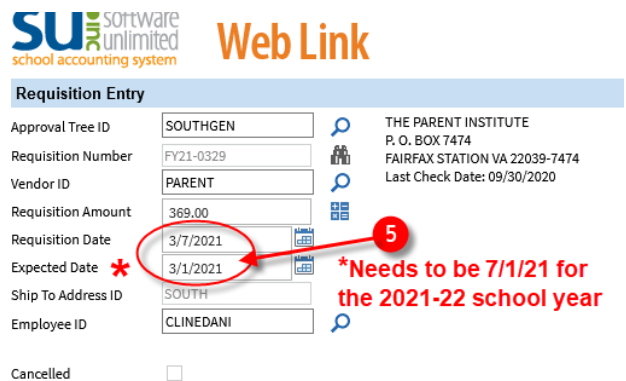


6. Make any additional changes necessary to update the requisition for the new request. Once all changes have been made, click the **save** icon on the bottom left.
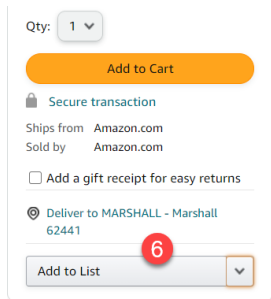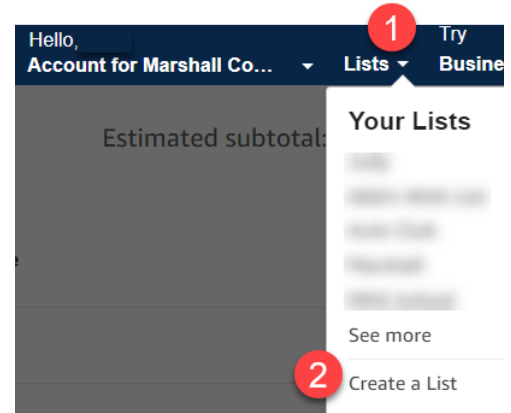


7. Click **Submit Current Requisition**

# Create an Amazon Wish List:

Sign into your Amazon account

1. In the top right corner of the Amazon window click **Lists**
2. Choose **Create a List**
3. Choose **Shopping List**
4. Give it a name
5. Click Create List
6. Now go shopping.  When you find the item you want to add to the wish list simply, add it to the list

7. To get the url for the list, go to the top right corner and choose **Lists**
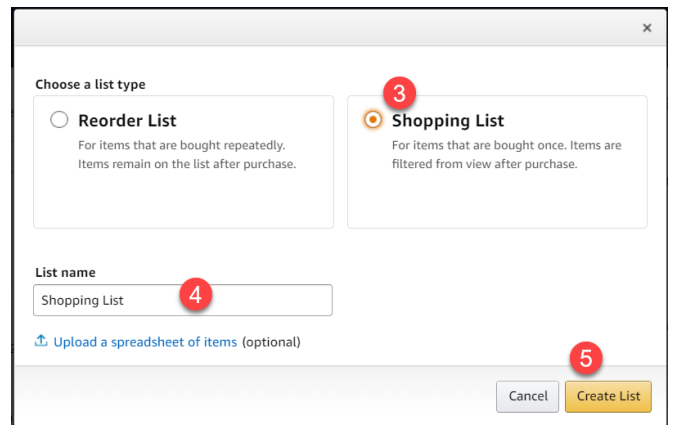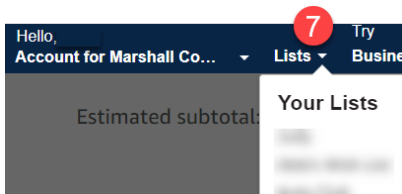
8. Choose your list
9. A new screen will open. Choose **Share**
10. Check the box that says "Public Link" and leave everything else blank
11. Click Copy to copy the link and paste it into url field of the requisition