





Requisitions for Purchase Orders

1. Sign in to Weblink
 - a. Alta-Aurelia Website
 - b. Staff Links
 - c. Weblink
 - d. Log in:
 - i. Username: First 4 of last name, first 3 of first name "KOPFSAM"
 - ii. Password: Last 4 SSN (Unless you changed it)
2. Select "Data Entry" on the tabs located at the top
3. Select "Requisition Entry"
4. Select "Approval Tree ID"
 - a. Use the magnifying glass
 - b. Select:
 - i. Activity
 - ii. Alta Elem
 - iii. Aurelia Elem/MS
 - iv. AA HS
 - v. Business Office
 - c. Either Double click or the green check mark at the bottom
5. Leave the "Requisition Number" blank - it will automatically fill in a number for you when you hit save.
6. Select "Vendor" (*skip to #7 if can't find vendor or #8 requesting reimbursement*)
 - a. Use the magnifying glass
 - b. Type vendor name in the (second box) "Vendor Name"
 - i. Hint: DO NOT type in the (first box) "Vendor ID"
 - c. Select the filter next to the search box in "Vendor Name"
 - d. Select "Contains"
 - e. Either Double Click the vendor name or the green check mark at the bottom
 - f. **Can't find vendor skip to #7**

vendor ID Search

Vendor ID	Vendor Name	Address 1
<input type="text"/>	<input type="text"/>	<input type="text"/>
1000PE	1000 PETALS LLC	2136 FORD PARKWAY #
2080ME	2080 MEDIA INC	2835 BRANDYWINE ROA
2NDWIN	2ND WIND EXERCISE EQUIPMENT	1600 LANDMARK DR
360CUST	360 CUSTOM DESIGNS	220 W. MAIN ST.
4SEASO	4 SEASONS FUND RAISING	1850 COLONIAL PARKW
4SEASP	4 SEASONS PLUMBING HEATING & COOLING	106 MAPLE CREEK ROA
90TENA	90 TEN ATHLETICS	49471 180TH AVE.
AACOMM	ALTA-AURELIA COMMUNITY SCHOOL	
AAFFA	ALTA-AURELIA FFA	101 W 5TH
AAHOTL	ALTA-AURELIA HOT LUNCH	
AAMUSI	ALTA AURELIA MUSIC BOOSTERS	
AASHOO	ALTA-AURELIA SHOOTING SPORTS	127 640TH ST.

1 2 3 4 5 6 7 8 9 10 ...

    [View All](#)

7. Can't find Vendor Name
 - a. Use the magnifying glass
 - b. Type "Unknown Vendor" in the (second box) "Vendor Name"
 - i. *Hint: DO NOT type in the (first box) "Vendor ID"*
 - c. Select the filter next to the search box in "Vendor Name"
 - d. Select "Contains"
 - e. Either Double Click the vendor name or the green check mark at the bottom
 - f. Type in "Your Comment" box at the top of the page to the right
 - g. Enter the Vendor Information:
 - i. Vendor Name
 - ii. Vendor Address

Requisition Entry

Approval Tree ID: ACTIVITY

Requisition Number: []

Vendor ID: []

Requisition Amount: []

Requisition Date: []

Expected Date: []

Requisition Description: []

Ship To Address ID: []

Employee ID: KOPFSAM

Cancelled:

Your Comment: []

Comments: No records to display.

8. Requesting Reimbursement
 - a. YOU are the Vendor
 - b. Type vendor ID in the (first box) "Vendor ID"
 - i. Example: "KOPFSAM" First 4 last name, First 3 first name
 - c. Press the "tab" button on keyboard
9. Leave the dollar amount blank until the very end
10. Enter the date of creation
 - a. ***Unless, it is for next school year then the date is July 1, 20XX***
11. Enter the date of desired receipt of product
12. Select "Ship to Address ID"
 - a. Use the magnifying glass
 - b. Select which building you want product shipped to
 - c. If you only have one building option and need a building address added:
 - i. Email: skopfmann@alta-aurelia.k12.ia.us
 - ii. I will add it to your user ID

13. Select “Account Number”

- a. #10 General Instruction and Supplies
- b. #21 Activity (Extracurriculars)
- c. #61 Nutrition
- d. I will recode these so do not worry too much on which one to select
- e. Type in “Your Comment” box
 - i. Example: TAG, ELL, Grade Level, Nurse, At Risk, Perkins, etc.

Requisition Entry

Approval Tree ID: ACTIVITY

Requisition Number: []

Vendor ID: []

Requisition Amount: []

Requisition Date: []

Expected Date: []

Requisition Description: []

Ship To Address ID: []

Employee ID: KOPFSAM

Cancelled:

Your Comment: []

Comments: No records to display.

14. Type in “Detail Description”

- a. IF it is a large order:
 - i. Example Amazon Orders:
 - 1. Type in what the supplies are for (SPED, grade level, office supplies, etc.)
 - 2. Print off your order and attach it to the PO
 - 3. No need to type multiple lines for large orders just attach a printed copy of your items so the person checking in packages can mark items off on the sheet

15. Type in “Quantity”

16. Type in “Unit Price”

17. Type in “Unit Description”

- a. Example: Each, Per package, etc.

18. Amount line will automatically fill in

19. URL Box

- a. If you have a URL link to go directly to the product, please copy and paste it in the URL box that at the far right of the requisition
 - i. **DO NOT COPY YOUR “CART” --- COPY THE LINK OF THE ACTUAL PRODUCT**
 - ii. If you copy your cart link, it takes you to a blank page

20. You must make a separate line for Shipping and Handling

21. Click on the calculator icon
 - a. At the top of the page, click the calculator icon
 - b. It will total your order, verify this amount is correct before submitting



Requisition Entry

Approval Tree ID:

Requisition Number:

Vendor ID:

Requisition Amount:

Requisition Date:

Expected Date:

Requisition Description:

Ship To Address ID:

Employee ID:

Cancelled:

22. Select the floppy disk to “Save”

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Distributed: 0.00 Remaining: 0.00
Account Description:

Submit Current Requisition
Submit All Requisitions
Print Requisition
Copy Requisition
0 Unsubmitted

23. Select “Submit Current Requisition”
 - a. If you do not “Submit”, it will not send to the approvers
 - b. You can verify it was submitted by the bottom left hand corner, if it state “1 Unsubmitted” you need to select “Submit All Requisitions”

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Distributed: 0.00 Remaining: 0.00
Account Description:

Submit Current Requisition
Submit All Requisitions
Print Requisition
Copy Requisition
0 Unsubmitted

24. Check Email
 - a. The PO will be sent to your email once it is approved by ALL approvers
25. Print PO from Email
26. Give PO to Building Secretary to order
 - a. If large order, please print off the items you are ordering and attach it to the PO

Recall a Requisition or Purchase Order

1. Select "Data Entry" on the tabs located at the top
2. Select "Requisition Status"
3. Select desired Requisition or PO
4. You can see who needs to approve yet or if it was rejected
5. PO# will show up in the "Purchase Order Column" once it has been processed and approved by ALL approvers

Questions?

Samantha Kopfmann
School Business Official
skopfmann@alta-aurelia.k12.ia.us
Alta: 712-200-1010
Aurelia: 712-434-2284