

Checklist for New Users Managing Web Link

This checklist can be utilized to ensure the appropriate fields are updated to reflect the new user who manages the Web Link module (or manages a part of the Web Link module, such as requisitions or leave requests). The steps would be completed once the new user is defined within the User Security option in the School Accounting System; for detailed instructions on adding a new user, refer to the [Adding a User topic](#) in the Help File.

1. Go into the Web Link Setup Options (SAS Main screen, **Utilities** menu, **Web Link Setup Options**).*
 - a. On the General Options tab, verify the verbiage in the Informational Message to Display field and the Maintenance Message to Display field and update if needed.
 - b. On the Employee Personal Information tab, verify the User ID in the Email Notifications section and update if needed.
 - c. On the Document Management tab (applicable for organizations with the K12Docs module licensed), verify the User ID in the Email Notifications section and update if needed.
2. Go into the Email Manager option (SAS Main screen, **Maintenance** menu, **Email Manager**).
 - a. On the From Email Addresses tab, add a new from email address using the new user's email information if the new user will send notifications for miscellaneous processes for Web Link. Refer to the [Completing Email Manager topic](#) in the Help File for detailed instructions.
 - b. On the Accounts Payable tab, verify the From Email Address ID in the Requisition Options section and update to use the from email address added in step 2 letter a (above) if needed.
 - c. In the Receiving Options section on the Accounts Payable tab, verify the From Email Address ID and the User ID for Receiving Email Notifications, and update if needed.
 - d. On the Web Link tab, verify the From Email Address ID in the General Options section and the Leave Request Options Section, and update if needed.

Tip: There are additional fields in other sections and tabs within the Email Manager that may also need to be updated to reflect the new user for use with other modules; this step only indicates the ones pertaining to the Web Link module.

3. If using Requisitions in Web Link, complete the following:
 - a. Go into the Requisition Options (Accounts Payable, **Requisition** menu, **Requisition Options**).** On the Approval Tree tab, bring up each approval tree that is defined and verify the various fields on the screen to see if any User IDs need to be updated. Refer to the [Changing an Approval Tree topic](#) and the [Adding an Approval Tree topic](#) in the Help File for detailed instructions.
 - b. If needed, complete the Reassign Requisition Approvers option (Requisition Options screen, **Options** menu, **Reassign Requisition Approvers**) to change the user who is assigned as an approver on previously submitted requisitions that are still pending approval.** Refer to the [Reassigning Requisition Approvers topic](#) in the Help File for detailed instructions.

Tip: A new user who is an approver will utilize the Requisition Approvals option from within either Accounts Payable or Web Link to complete the approval process for submitted requisitions that are pending. A new user who will need to convert fully approved requisitions to purchase orders will utilize the Select Requisitions for Single Purchase Order option or the Select Requisitions for Multiple Purchase Orders option from within Accounts Payable, or utilize the Select Requisitions button from within Web Link when needed.

4. If using Leave Requests in Web Link, complete the following:
 - a. Go into the Employee Groups option (Payroll, **Maintenance** menu, **Employee Groups**). Select each Employee Group that is defined in your data to be used with leave requests (have the Use with Leave Request Approvals field selected) and update the Group Manager Approver ID field if needed.
 - b. Go into the Leave Requests Options (Payroll, **Options** menu, **Leave Requests** submenu, **Leave Request Options**).** On the Leave Approval Paths tab, bring up each approval path that is defined and verify the various fields on the screen to see if any User IDs need to be updated. Refer to the

[Changing an Approval Path topic](#) and the [Adding an Approval Path topic](#) in the Help File for detailed instructions.

Note: For organizations with the Human Resources module licensed, click the **FMLA** tab and also verify the various fields for the FMLA approval path, if applicable.

- c. If needed, complete the Reassign Leave Request Approvers option (Leave Request Options screen, **Options** menu, **Reassign Leave Request Approvers**) to change the user who is assigned as an approver on previously submitted leave requests that are still pending approval.** Refer to the [Reassigning Leave Request Approvers topic](#) in the Help File for detailed instructions.

Tip: A new user who is an approver will utilize the Leave Request Approvals option from within either Payroll or Web Link to complete the approval process for submitted leave requests that are pending. A new user who will need to bring fully approved leave requests into a batch for processing in a Payroll check cycle will utilize the Select Leave Requests/Substitutes for Processing option in Payroll when needed.

* Must be completed by a user who is defined as a Supervisor or Web Link Administrator (within the User Security option in the School Accounting System)

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Tip: We recommend the new user participate in Web Link training by attending an upcoming Web Link Workshop or the webinars for Web Link (live webinars or webinar recordings). [Click here](#) to access the Training Calendar and register for an upcoming Web Link workshop or live webinar, or request a webinar recording.