**ENTERING REQUISITIONS**

Here are the steps a secretary or bookkeeper can follow to enter a requisition in Remote Link:

1. Login to Remote Link using this link [Marathon Web (jcsd.ms)](http://marathon.jcsd.ms/MarathonWeb/login.aspx) (if a secretary or bookkeeper doesn't have a Remote Link account they can email Ryan and he will set one up)
2. Click on blue "Remote Link" button
3. Hover over "Activities" then select "Purchase Requisition Maintenance"
4. Select the location at the top (you may only have access to one location)
5. Over to the right under the pie chart is “Account Selection” (Choose Beginner “I need help with my Accounts”)
6. Click the "Add Requisition" button
7. Select “Deliver To” (This should default to your location; if not, select location)
8. Click in “Description” Type your school initials (If the requisition has a board approved date, Bid File #, or EPL #, enter this information first then your school initials)
9. Tab over to “Attention” Enter the person requesting requisition or your first initial, last name (ex: C Elliott)
10. Tab to “Vendor” Enter part of the Vendor Name (You can use % before part of the Vendor Name to give you a list to choose from)
11. Click “Lookup”
12. Click “Select” to choose the correct Vendor (Make sure the address matches. Some have multiple Vendors)
13. Click “Save”
14. Click “Add Line Items”
15. Enter “Quantity, Unit, Description, Catalog No. (Item No. if there is one), and Price. Then click “Add” (Enter as many Lines as needed until finished)
16. Click “Add Account Lines”
17. Click on the dropdown to find the Account you need (If you don’t find the Account, you will have to email Ryan with the account code you need access to)
18. You can add as many “Account Lines” needed if you are splitting between different Accounts
19. Click “Add Documents” if you have documents to attach (Quotes, EPL’s, etc.) If you need help with adding a document call and someone will walk you through
20. Click “Submit” once you have entered all information for the Requisition

This request then gets sent to the administrator/supervisor to be approved and they are notified by email that it is waiting for them to be approved in Remote Link.

**APPROVING REQUISITIONS**

Here are the steps an administrator/supervisor can follow to approve requisitions in Remote Link:

1. Login to Remote Link using this link [Marathon Web (jcsd.ms)](http://marathon.jcsd.ms/MarathonWeb/login.aspx) (if an administrator or supervisor doesn't have a Remote Link account they can email Ryan and he will set one up)
2. Click on blue "Remote Link" button
3. Hover over "Activities" then scroll down to “Administrator Menu” then click “Purchase Requisition Authorization”
4. Click on dropdown arrow to choose “Location” (You may only have access to one location)
5. Enter your “Authorization Code” (Contact Ryan or Jennifer for your Authorization Code)
6. Click “Filter”
7. Click “Authorize” over to the right of the requisition (This will bring up another screen with all of the requisition information)
8. Check the Account Line to make sure it is coming out of the correct account and other pertinent information
9. Click “Authorize” (this will notify the next person to approve)
10. You may click “Back to Filter” without authorizing if you have a question about it before you authorize.

**PRINT P.O.**

Here are the steps a secretary or bookkeeper can follow to print a P.O. after it has been upgraded in Remote Link:

1. Login to Remote Link using this link [Marathon Web (jcsd.ms)](http://marathon.jcsd.ms/MarathonWeb/login.aspx) (if a secretary or bookkeeper doesn't have a Remote Link account they can email Ryan and he will set one up)
2. Click on blue "Remote Link" button
3. Hover over "Activities" then select "Purchase Requisition Maintenance"
4. Click “Filter” (Remember this will bring up only the current month; if you need a previous month, you have to change the Requisition Start Date)
5. Find the requisition you need and click on the “PO number” to open and print.

If you would like someone to demonstrate the above steps at your office please let the Business Office know and we will be happy to do so.

**BUDGET AMENDMENT REQUEST**

Here are the steps a secretary or bookkeeper can follow to enter a budget amendment request in Remote Link:

1. Login to Remote Link using this link [Marathon Web (jcsd.ms)](http://marathon.jcsd.ms/MarathonWeb/login.aspx) (if a secretary or bookkeeper doesn't have a Remote Link account they can email Ryan and he will set one up)
2. Click on blue "Remote Link" button
3. Hover over “Activities” then select “Budget Amendment Request”
4. Click on dropdown arrow to choose “Location” (You may only have access to one location)
5. Enter the “Transfer From” and Transfer To” account codes
6. Enter the “Amount”
7. Enter a brief “Description”
8. Click “Add”

This request then gets sent to the administrator/supervisor to be approved and they are notified by email that it is waiting for them to be approved in Remote Link.

**APPROVING BUDGET AMENDMENTS**

Here are the steps an administrator/supervisor can follow to approve budget amendment requests in Remote Link:

1. Login to Remote Link using this link [Marathon Web (jcsd.ms)](http://marathon.jcsd.ms/MarathonWeb/login.aspx) (if a secretary or bookkeeper doesn't have a Remote Link account they can email Ryan and he will set one up)
2. Click on blue "Remote Link" button
3. Hover over "Activities" then scroll down to “Administrator Menu” then click “Budget Amendment Authorization”
4. Click on dropdown arrow to choose “Location” (you may only have access to one location)
5. Click either “Approve”, “Approve All”, “Deny” or “Deny All”

If you would like someone to demonstrate the above steps at your office please let the Business Office know and we will be happy to do so.

**PRINTING BUDGET REPORTS**

Here are the steps a secretary, bookkeeper, supervisor or administrator can follow to print a budget report in Remote Link:

1. Login to Remote Link using this link [Marathon Web (jcsd.ms)](http://marathon.jcsd.ms/MarathonWeb/login.aspx) (if a secretary or bookkeeper doesn't have a Remote Link account they can email Ryan and he will set one up)
2. Click on blue "Remote Link" button
3. Hover over “Activities” then scroll down to “Budget Reports” then click “Comprehensive Unit Report”
4. Click on dropdown arrow to choose “Location” (You may only have access to one location)
5. Click to highlight under “Available Funds” which fund/s to move to “Selected Funds” (Holding the CTRL button while clicking on multiple funds will highlight all needed)
6. Enter “Unit” in both columns
7. Click “Filter” then Open to print report (Report shows your funds available, expensed, and PO’s open/encumbered)