

Slide 1 - Slide 1

The screenshot shows the Skyward Web Financial Management interface. The top navigation bar includes 'Home', 'Account Management', 'Vendors', 'Purchasing', and 'Accounts Payable'. The main content area is divided into three columns: 'Account Master' (with 'Chart of Accounts'), 'Budget Management' (with 'Transfers' containing 'Submit Transfers', 'Approvals', and 'Activity'), and 'General Inputs' (with 'Journal Entry' containing 'Submit Journal Entry', 'Approvals', and 'Journal Entry'). A yellow callout box is overlaid on the 'Approvals' link in the 'Budget Management' section.

Budget Transfer Approvals

Go to Financial Management, Budget Management, Transfers, Approvals.

Who, What, When, Why?

Users who are assigned as approvers of Budget Transfers, either through a Budget Transfer Group or through Group Access by Person, will use Approvals to approve or deny Budget Transfer Requests.

Budget Transfer Requests must be fully approved before becoming Batch Status Budget Transfer batches.

Refer to the tutorials under Web Financial Management, Account Management, Budget Management, Product Setup, Configuration for information on Budget Transfer Setup, Budget Transfer Groups and Group Access by Person.

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javascript:appNav('fobrqbrws008.w', '', '25341', 'WFAMBMTApprovals', ''); 100%

Slide 2 - Slide 2

The screenshot shows the 'Approvals' page in the Skyward system. At the top, there are navigation tabs for 'Home', 'Account Management', 'Vendors', 'Purchasing', and 'Accounts Payable'. The main content area displays summary statistics: 'Number of Transactions Approved: 0', 'Total Amount Approved: \$0.00', 'Number of Transaction Denied: 0', and 'Total Amount Denied: \$0.00'. A table lists budget transfer requests with columns for 'Create Date', 'BT Group', 'S', 'Approve', 'Deny', 'Appr & Reroute', 'Reroute To', 'Batch', and 'Description'. Four records are shown, all dated 06/22/2012 and belonging to BT Group 400. The first record is highlighted. To the right of the table are buttons for 'Submit Approvals and Denials', 'Refresh', 'Edit', '**Notes', and 'Attach'. A status bar at the bottom indicates '4 records displayed' and 'Create Date:'. Three yellow callout boxes provide instructions: 1. The Budget Transfers that await the user's approval are displayed. 2. Expand a request to view the Details of the request, the Approval History, and Notes that have been entered. 3. Click Edit to modify a highlighted request. Click Notes to add or review notes for the request. Click Attach to add or review attachments to the request. Note: If notes or attachments exist two asterisks will display on the Notes or Attach button.

Create Date	BT Group	S	Approve	Deny	Appr & Reroute	Reroute To	Batch	Description
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00004	Transfer 2
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00005	Transfer 3
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00006	Transfer 4
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00007	Transfer 5

Slide 3 - Slide 3

Approvals - WF\AM\BM\TR\AP\MS - 25341 - 05.12.06.00.05 - Windows Internet Explorer

Skyward School District

Heath Peterkasr Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Approvals

Number of Transaction \$85.00
Number of Transaction \$0.00

Submit Approvals and Denials

Views: General Filters: *Skyward D

Create Date	BT Group	S	Approve	Deny	Appr & Reroute	Reroute To	Batch	Description
06/22/2012	400	S	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00004	Transfer 2
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00005	Transfer 3
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00006	Transfer 4
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00007	Transfer 5

Refresh

Edit

**Notes

Attach

Transactions Awaiting Lower Level Approval

20 4 records displayed Create Date:

100%

Slide 4 - Slide 4

Deny Budget Transfer

Create Date: 06/22/2012 Budget Transfer Group: 400 High School
Status: Submitted Batch: 11-00005
Description: Transfer 3
Debit Amount: 125.00 Credit Amount: 125.00
Fiscal Year: 2011 - 2012 Created By: Peterkascr, Heath L

Notes: This is a duplicate entry. The correction has already been posted.

1. When Deny is checked the Deny Budget Transfer screen will open. The user is able to enter Notes to explain why the request was denied and/or additional information that may be needed. The notes entered here will display in the Approval History and on the Budget Transfer Request Denial email that is sent to the requestor.

2. Click Save.

4 records displayed Create Date: []

Slide 5 - Slide 5

Approvals - WF\AM\BM\TR\AP\MS - 25341 - 05.12.06.00.05 - Windows Internet Explorer

Skyward School District

Heath Peterkasr Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Approvals

Number of Transactions Approved: 1 Total Amount Approved: \$85.00
 Number of Transaction Denied: 1 Total Amount Denied: \$125.00

Submit Approvals and Denials

Views: General Filters: *Skyward Default Refresh

Create Date	BT Group	S	Approve	Deny	Appr & Reroute	Reroute To	Batch	Description
06/22/2012	400	S	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00004	Transfer 2
06/22/2012	400	S	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		11-00005	Transfer 3
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00006	Transfer 4
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00007	Transfer 5

Edit Notes Attach

Transactions Awaiting Lower Level Approval

If using Budget Transfer Groups, and the Budget Transfer Setup option to **Allow reroute of Budget Transfer approvals to another user** is set, the Approve & Reroute option will be available.

With this option, approvers can choose to bring **another user** into the approval process.

Check **Approve & Reroute**.

20 4 records displayed Create Date:

100%

Slide 6 - Slide 6

Reroute Budget Transfer

Create Date: 06/22/2012 Budget Transfer Group: 400 High School
Status: Submitted Batch: 11-00006
Description: Transfer 4
Debit Amount: 92.00 Credit Amount: 92.00
Fiscal Year: 2011 - 2012 Created By: Peterkascr, Heath L
Reroute To: [Dropdown menu]
Notes: Borjasscr, Ramona K
Kinghornscr, Ike L

Check Spelling
Save
Back

The Reroute Budget Transfer screen opens.
Click the Reroute To drop-down to select an additional approver.
The list of names are all approvers from all Budget Transfer Groups.

20 4 records displayed Create Date: [Field]

Slide 7 - Slide 7

The screenshot shows a web browser window displaying the 'Reroute Budget Transfer' form in the Skyward system. The form contains the following fields and values:

- Create Date: 06/22/2012
- Budget Transfer Group: 400 High School
- Status: Submitted
- Batch: 11-00006
- Description: Transfer 4
- Debit Amount: 92.00
- Credit Amount: 92.00
- Fiscal Year: 2011 - 2012
- Created By: Peterkascr, Heath L
- Reroute To: Borjasocr, Ramona K
- Notes: Please review this entry.

Buttons on the right side of the form include 'Check Spelling', 'Save', and 'Back'. A yellow callout box with the text '2. Click Save.' points to the 'Save' button. Another yellow callout box with the text '1. Optionally, enter Notes to explain why the additional approval is necessary. The note will display in the Approval History and in the email to the approver if approval emails are activated in the Budget Transfer Setup Options.' points to the 'Notes' field.

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Approvals - WF\AM\BM\TR\AP\MS - 25341 - 05.12.06.00.05 - Windows Internet Explorer

Heath Peterkasr Account Preferences Exit ?

Home Account Management Vendors Purchasing Account Payabl

Approvals ☆

Number of Transactions Approved: 2 Total Amount Approved: \$177.00
Number of Transaction Denied: 1 Total Amount Denied: \$125.00

Submit Approvals and Denials

Views: General Filters: *Skyward Default Refresh

Create Date ▲	BT Group	S	Approve	Deny	Appr & Reroute	Reroute To	Batch	Description
▶ 06/22/2012	400	S	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00004	Transfer 2
▶ 06/22/2012	400	S	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		11-00005	Transfer 3
▶ 06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00007	Transfer 5
▶ 06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ramona K Borjasscr	11-00006	Transfer 4

Edit Notes Attach

Transactions Awaiting Lower Level Approval

20 4 records displayed Create Date:

100%

2. The total Number and Amount of Approved and Denied requests are tracked at the top of the screen.

1. The Reroute approver's name is listed under the Reroute To column.

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The screenshot shows the Skyward School District web application interface for budget transfer approvals. At the top, the user is identified as Heath Peterkasr. The main navigation includes Home, Account Management, Vendors, Purchasing, and Accounts Payable. The 'Approvals' section is active, displaying summary statistics: 2 approved transactions for a total amount of \$177.00, and 1 denied transaction for a total amount of \$125.00. A 'Submit Approvals and Denials' button is visible. A modal dialog box titled 'Submit Approvals and Denials' is open, showing a summary of the transactions and asking 'Would you like to submit these transactions?' with 'Yes' and 'No' buttons. Two yellow callout boxes provide instructions: one points to the 'Submit Approvals and Denials' button, and the other points to the modal dialog box.

1. Click **Submit Approvals and Denials** to record the decisions.

2. A **confirmation** message displays, which summarizes the number and amount of approvals and denials.
Click **Yes** to submit the decisions or **No** to cancel.

Date	Amount	Status	Approved	Denied
06/22/2012	400	S	<input checked="" type="checkbox"/>	<input type="checkbox"/>
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>
06/22/2012	400	S	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2 approved transactions
1 denied transaction
Approved Amount: \$177.00
Denied Amount: \$125.00
Would you like to submit these transactions?
Yes No

Slide 10 - Slide 10

Approvals - WF\AM\BM\TR\AP\MS - 25341 - 05.12.06.00.05 - Windows Internet Explorer

Skyward School District

Heath Peterkasr Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Approvals

Number of Transactions Approved: 0 Total Amount Approved: \$0.00
Number of Transaction Denied: 0 Total Amount Denied: \$0.00

Submit Approvals and Denials

Views: General Filters: *Skyward Default Refresh

Create Date	BT Group	S	Approve	Deny	Appr & Reroute	Reroute To	Batch	Description
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00007	Transfer 5

The completed requests are removed from the Approvals screen.

20 1 records displayed Create Date:

100%

Slide 11 - Slide 11

The screenshot shows the Skyward Financial Management web application. The top navigation bar includes 'Home', 'Account Management', 'Vendors', 'Purchasing', and 'Accounts Payable'. The main content area is divided into three columns: 'Account Master' (with 'Chart of Accounts'), 'Budget Management' (with 'Transfers' sub-menu containing 'Submit Transfers', 'Approvals', and 'Activity'), and 'General Inputs' (with 'Journal Entry' sub-menu containing 'Submit Journal Entry', 'Approvals', and 'Journal Entry'). A 'District News' section at the bottom left shows 'No news to display.' A 'Approve Journal Entry' section is visible on the right. Two yellow callout boxes provide instructions: the first points to the 'Account Management' menu, and the second points to the 'Approvals' link under 'Transfers'. The footer contains copyright information and view options: '© 2012 Skyward, Inc. All rights reserved.' and 'Desktop View Button Rows Windows 7 / Internet Explorer 9'.

1. Log in to the Financial Management system as a higher level Budget Transfer Approver and click **Account Management**.

2. Under Budget Management, Transfers click **Approvals**.

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Approvals - WF\AM\BM\TR\AP\MS - 25341 - 05.12.06.00.05 - Windows Internet Explorer

Skyward School District

Home Account Management Vendors Purchasing Accounts Payable

Approvals

Number of Transactions Approved: 0 Total Amount Approved: \$0.00
Number of Transaction Denied: 0 Total Amount Denied: \$0.00

Submit Approvals and Denials

Views: General Filters: *Skyward Default

Create Date	BT Group	S	Approve	Deny	Appr & Reroute	Reroute To	Batch	Description
06/22/2012	400	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11-00004	Transfer 2

Refresh

Edit

**Notes

Attach

Transactions Awaiting Lower Level Approval

Higher level approvers have an extra option to approve or deny requests that are **awaiting lower level** approval.

This can be useful when lower level approvers are **unavailable** to approve requests.

Click **Transactions Awaiting Lower Level Approval**.

20 1 records displayed Create Date:

Slide 13 - Slide 13

The screenshot shows a web application interface for budget transfer approvals. At the top, a yellow callout box contains the text: "1. A list of requests waiting for lower level approval is displayed. Expand the details of a request to view the Detail Lines and Approval History." Below this, a table lists budget transfer requests. The first request is highlighted in blue. A second yellow callout box points to the 'Notes' and 'Attach' buttons on the right side of the interface, containing the text: "2. Click Notes or Attach to add or view notes and attachments for a highlighted request." The interface includes a search bar, a 'Refresh' button, and a list of actions: 'Back', 'Approve', 'Deny', 'Notes', and 'Attach'. The main content area shows the expanded details for the first request, including 'Budget Transfer Transaction Information' and 'Detail Lines'.

	Debit Amount	Credit Amount	Fiscal Year	Cre
06/22/2012 400 S 11-00006 Transfer 4	50.00	50.00	2011 - 2012	Jea
06/22/2012 400 S 11-00006 Transfer 4	92.00	92.00	2011 - 2012	Jea
06/22/2012 400 S 11-00007 Transfer 5	655.00	655.00	2011 - 2012	Jea

3 records displayed

Slide 14 - Slide 14

The screenshot shows a web browser window titled "Transactions Awaiting Lower Level Approval - WF\AM\BM\TR\AP\MS - 25341 - 05.12.06.00.05 - Windows Internet Explorer". The main content area displays a table of transactions with columns for Create Date, Group, S, Batch, Description, and Debit Amount. A yellow callout box points to a row with a date of 06/22/2012 and a description of "Transfer 4".

Create Date	Group	S	Batch	Description	Debit Amount
03/22/2012	400	S	11-00002	Transfer	50.00
06/22/2012	400	S	11-00006	Transfer 4	92.00

A "Message from webpage" dialog box is open in the center, containing the text: "You are about to approve a Budget Transfer that is awaiting lower approval. Are you sure you want to continue?". The dialog has "OK" and "Cancel" buttons.

Two yellow callout boxes provide instructions: the first points to the "Approve" or "Deny" buttons, and the second explains the confirmation message and the next steps based on the user's choice.

1. Highlight a request and click **Approve** or **Deny**.

2. A **message** displays to confirm that the request is to be approved (or denied).
Click **OK** to proceed or **Cancel** to stop the process.
Click **OK**.
If the request is denied a **Deny Budget Transfer** screen will open to allow for the entry of notes.

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The screenshot shows a web application interface with the following elements:

- Title Bar:** Transactions Awaiting Lower Level Approval - WF\AM\BM\TR\AP\MS - 25341 - 05.12.06.00.05 - Windows Internet Explorer
- Page Header:** Transactions Awaiting Lower Level Approval
- Navigation:** Views: General, Filters: *Skyward Default, Refresh button.
- Table:**

Create Date	Group	S	Batch	Description	Debit Amount	Credit Amount	Fiscal Year	Cre
03/22/2012	400	S	11-00002	Transfer	50.00	50.00	2011 - 2012	Jea
06/22/2012	400	S	11-00007	Transfer 5	655.00	655.00	2011 - 2012	Jea
- Callout Box:** A yellow speech bubble containing the text: "Once the decision is recorded the request is **removed** from the screen."
- Buttons:** Back, Approve, Deny, Notes, Attach.
- Footer:** 20 records displayed, Create Date: [input field]

Slide 16 - Slide 16

The screenshot shows the Skyward Financial Management system interface. At the top, the browser title is "Web Financial Management - WF - 10636 - 05.12.06.00.05 - Windows Internet Explorer". The user is logged in as "Jeanna Ormandscr" with options for "Account", "Preferences", and "Exit". The main navigation menu includes "Home", "Account Management", "Vendors", "Purchasing", "Accounts Payable", "Accounts Receivable", "SBAA", "Custom Reports", "Federal/State Reporting", and "Administration".

Two yellow callout boxes provide instructions:

- Callout 1: "1. Log in to the Financial Management system as the requestor and click Account Management." This points to the "Account Management" menu item.
- Callout 2: "2. Under Budget Management, Transfers click Activity." This points to the "Activity - MS" link under the "Transfers - TR" section.

The main content area is titled "Financial Management Setup" and is divided into three columns of menu items:

- Account Management - AM** (Setup): Project/Grant Management - PG, Budgetary Data Mining - DM, Reports - RE, Batch Reports - BR.
- Account Master - CA** (Setup): Account Profile - AP, Chart of Accounts - CA, Account Summary Templates - AS, Operating Statement Accounts - OS, Balance Sheet Accounts - BS.
- Budget Management - BM** (Setup): Budget Entry - BE, Budget Revisions - MS, Adopt Budget - AB, Requisitions - RE (Budget Request - RE, Budget Approval - BA, Mass Approve - MA), Transfers - TR (Submit Transfers - MS, Approvals - MS, Activity - MS, Transfers - MS).
- General Inputs - GI** (Setup): Journal Entry - JE (Submit Journal Entry - MS, Approvals - MS, Journal Entry - MS), Cash Receipts - CA (Cash Receipts - MS).

On the right side, there is a "Product Setup" section with a list of items: Product Setup (WF\AM\PS), Codes (WF\AM\BM\TR\PS\CO), Submit Transfers (WF\AM\BM\TR\ST\MS), Approvals (WF\AM\BM\TR\AP\MS), Configuration (PS\CA\ST\CF), and Submit Journal Entry.

At the bottom left, the copyright notice reads "© 2012 Skyward, Inc. All rights reserved." At the bottom right, there are radio buttons for "Desktop View" (selected) and "Button Rows", and the text "Windows 7 / Internet Explorer 9".

Slide 17 - Slide 17

The screenshot shows the Skyward School District Activity page. The page title is "Activity - WF\AM\BM\TR\AC\MS - 25342 - 05.12.06.00.05 - Windows Internet Explorer". The user is identified as "Jeanna Ormandscr". A feedback banner says "We value your feedback". The navigation menu includes Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, SBAA, Custom Reports, Federal/State Reporting, and Administration. The current view is "Activity" with filters set to "*All".

The main table displays budget transfer transactions:

Create Date	Budget Transfer Group	S	Batch	Description	Debit Amount	Credit Amount	Fisc
06/22/2012	400	S	11-00007	Transfer 5	655.00	655.00	201
06/22/2012	400	S	11-00004	Transfer 2		00.00	201
06/22/2012	400	D	11-00005	Transfer 3		00.00	201
06/22/2012	400	B	11-00006	Transfer 4		00.00	201

Below the table, there are buttons for "Expand All", "Collapse All", "Modify Details (displaying 4 of 4)", and "View Print". The "Approval History" section is expanded, showing the following details:

Date	Time	Status	Approver Level	Name/Note
06/22/2012	12:57:06 PM	Approved	Level 0	Kinghomscr, Ike L AUTO APPROVAL - Hierarchy Rule - approved by Ike L Kinghomscr, , Level 0 This Budget Transfer was auto approved on 06/22/2012 at 12:57:06 PM * Once a Budget Transfer is approved at a level by an approver, all the levels up to their highest level become approved.
06/22/2012	12:55:48 PM	Approved	Level 1	Peterkasrcr, Heath L REROUTED to Ramona K Borjasscr by Heath L Peterkasrcr Date: 06/22/2012 Time: 12:55:48 PM Please review this entry.

A yellow callout box contains the following text:

Expand a request and then expand the **Approval History**.
An **approval record** is entered for each decision along with notes when approvals are **rerouted**, or when **higher level approvers** override lower levels.
This concludes the tutorial.

At the bottom of the page, there is a "Notes" section with an "Add Notes" button. The footer shows "20" records displayed and a "Create Date" field.