

Slide 1 - Slide 1

The screenshot shows the Skyward School District web application interface. The top navigation bar includes tabs for Home, Employee Information, Time Off, True Time, FastTrack Open Positions, Work Requests, Account Master, Budget Management, Purchasing, Inventory Requisitions, Employee Review, Expense Reimbursement, and Online Open Enrollment. The 'Expense Reimbursement' tab is active, showing a sub-menu with 'Submit Request', 'Approve', and 'Activity'. A yellow callout box is overlaid on the 'Submit Request' menu item, containing the following text:

Submit Request

Navigate to **Employee Access, Expense Reimbursement, Submit Request.**

Who, What, When, Why?

Submit Request allows users to submit expenses for approval and be reimbursed via ACH or A/P check.

Submit Request would be used when expenses have been incurred that are eligible for reimbursement.

The interface also features a 'Recent Programs' sidebar on the right with items like 'Employee Access Home', 'Product Setup Home', 'Web Human Resources', 'Secured User', 'Financial Management Home', 'Configuration', and 'Human Resources Home'. The footer contains copyright information for Skyward, Inc. (© 2013), a user group identifier (C.SUG\Indiana 2012 User Group - Finance), and the browser version (Windows XP / Internet Explorer 8).

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Submit Request - 05.12.10.00.00 - Windows Internet Explorer

Skyward School District

Angela Avilezscr Account Preferences Exit ?

Home Employee Information Time Off True Time FastTrack Work Account Budget Purchasing Inventory Requisitions Employee Review Expense Reimbursement Online Open Enrollment

Submit Request The Submit Request browse displays.

Views: General Filters: *Skyward Default

Reimbursement Number	Req Sts	Date Entered	Expenses From	Expenses To	Reimburs Amount	Direct Bill Amount	Total Amount	Purpose
There are no records to display; check your filter settings.								

Click Add.

10 0 records displayed Reimbursement Number:

Slide 3 - Slide 3

The screenshot shows a web browser window titled "Submit Request - 05.12.10.00.00 - Windows Internet Explorer" displaying the "Expense Reimbursement Request Maintenance" form. The form is for user "Avilezscr, Angela A" and includes the following fields and callouts:

- Callout 1:** "1. The Expense Reimbursement Request Maintenance screen displays." points to the top of the form.
- Callout 2:** "2. Enter the Expenses From and To date range." points to the "Expenses From" and "Expenses To" date fields, both containing "03/11/2013".
- Callout 3:** "3. Enter a Purpose for Reimbursement description." points to the "Purpose for Reimbursement" text area, which contains the word "Conference".
- Callout 4:** "4. Click Save to continue or Back to cancel." points to the "Save" and "Back" buttons on the right side of the form.

Other form details include: "Reimbursement payment option: Paid via AP ACH. If AP ACH is not setup you will receive a Paper Check." and "District Payment Reimbursement information: carol@somewhere.com". A note at the bottom states "Asterisk (*) denotes a required field". The browser's address bar shows "Local intranet" and the page has a "100%" zoom level.

Slide 4 - Slide 4

The screenshot shows the Skyward web application interface for 'Expense Reimbursement Request Maintenance'. The browser title is 'Submit Request - 05.12.10.00.00 - Windows Internet Explorer'. The user is logged in as 'Angela Avilezscr'. The application has a navigation menu with options like Home, Employee, Time, True, FastTrack, Work, Account, Budget, Purchasing, Inventory, Employee, Expense, and Online. The main content area is titled 'Expense Reimbursement Request Maintenance' and contains the following information:

- Expense Reimbursement Information**
- Reimbursement For: Avilezscr, Angela A
- Expenses From: 03/11/2013 To: 03/11/2013 1 Day
- Purpose for Reimbursement: Conference
- Buttons: Edit Master, Notes, * Attachments, Submit For Approval, Save and Finish Later

A yellow callout box provides the following explanations:

- Edit Master**: The **Edit Master** link allows you to return to the previous screen and modify the request.
- Notes**: The **Notes** link allows you to enter a note regarding the request.
- Attachments**: The **Attachments** link allows you to attach receipts or other pertinent documentation to the request.
- Submit for Approval**: The **Submit for Approval** button is inactivated until the detail is completed.
- Save and Finish Later**: The **Save and Finish Later** button is active and allows you to save and return to finish the request later.

Below the callout box, there is a table with columns for '#', 'Date', and 'Type'. The table is currently empty, with the text 'There are no records to display' below it. To the right of the table are buttons for 'Add', 'Edit', 'Delete', 'Clone', and 'Mass Add Detail'.

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Submit Request - 05.12.10.00.00 - Windows Internet Explorer

Skyward School District

Angela Avilezscr Account Preferences Exit ?

Home Employee Time True FastTrack Work Account Budget Purchasing Inventory Employee Expense Online

Expense Reimbursement Request Maintenance - 05.12.10.00.00 - Windows Internet Explorer

Expense Reimbursement Request Maintenance

Expense Reimbursement Information

Reimbursement For: Avilezscr, Angela A

Expenses From: 03/11/2013 To: 03/11/2013 1 Day

Purpose for Reimbursement: Conference

Reimbursement payment option: Paid via AP ACH. If AP ACH is not setup you will receive a Paper Check.

Total Reimbursement Amount: \$0.00

Edit Master
Notes
* Attachments

Submit For Approval
Save and Finish Later

Expense Reimbursement Detail Lines

Views: General Filters: *Skyward Default

#	Date	Type	Description/Customer	Quantity
<i>There are no records to display; check your filter settings.</i>				

Click Add to create the Detail Line(s) for this reimbursement request.

Add
Clone
Mass Add Detail

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Expense Reimbursement Request Detail Maintenance

The Expense Reimbursement Information carries forward from the previous screen.

Expense Reimbursement Information

Expenses From: 03/11/2013 To: 03/11/2013 1 Day
Total Reimbursement Amount: \$30.00

Add Expense Reimbursement Detail Line

Line Number: 1 Receipt Attached Direct Bill/Do not Reimburse

* Date: 03/11/2013 Monday

* Reimbursement Type: Meals PM

Category: Meals

Quantity: 1
Amount: \$30.00 (Maximum)
Total Amount: \$30.00

* Description/Customer: Required to stay for dinner - attended evening

Detail Line Accounts

* Account: 0100 A 8000000 0000 000 000 - GENERAL FUND/cash/CASH/

Asterisk (*) denotes a required field

Enter the **Detail Line** information for the open fields.

- Date** - Enter the date of the expense.
- Receipt Attached** - Check if a receipt will be attached.
- Direct Bill/Do Not Reimburse** - Check if the entry is documentation for an expense that will be billed to the district, and should not be reimbursed.
- Reimbursement Type** - Use the drop-down to select the reimbursement type code. This code will determine the Quantity and Amount fields.
- Quantity and Amount** - These fields will be determined by the reimbursement type selected above.
- Description/Customer** - This is a free form field used to enter any necessary details for the expense.

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Expense Reimbursement Request Detail Maintenance

Expense Reimbursement Information

Expenses From: 03/11/2013 To: 03/11/2013 1 Day
Total Reimbursement Amount: \$30.00

Add Expense Reimbursement Detail Line

Line Number: 1 Receipt Attached

* Date: 03/11/2013 Monday

* Reimbursement Type: Meals PM

Category: Meals

Quantity: 1
Amount: \$30.00
Total Amount: \$30.00

* Description/Customer: Required to stay for d

1. Detail Line Accounts

There are two ways to enter the account(s):

- a) Click into the field and begin typing the account. The EEL will display the account(s) from which to choose.
- b) Click on the Account link. This opens a list of all accounts from which to choose.

2. Click Save when done entering the Detail Line. Clicking Back will close without saving.

Detail Line Accounts

* Account	Account Selection ?	Amount	Percent	More
0100 A 8000000 0000 000 000 - GENERAL FUND/cash/CASH/		30.00	100.00	
Total:		30.00	100.00	

Asterisk (*) denotes a required field

Slide 8 - Slide 8

The screenshot shows the 'Expense Reimbursement Request Maintenance' web application. The top navigation bar includes 'Home', 'Employee', 'Time', 'True', 'FastTrack', 'Work', 'Account', 'Budget', 'Purchasing', 'Inventory', 'Employee', 'Expense', and 'Online'. The user is logged in as 'Angela Avilezscr'. The main form contains the following information:

- Expense Reimbursement Information:**
 - Reimbursement For: Avilezscr, Angela A
 - Expenses From: 03/11/2013 To: 03/11/2013 1 Day
 - Purpose for Reimbursement: Conference
 - Reimbursement payment option: Paid via AP ACH. If AP ACH is not setup you will receive a Paper Check.
 - Total Reimbursement Amount: \$30.00
- Expense Reimbursement Detail Lines:**
 - Views: General Filters: *Skyward Default
 - Table with 10 columns: #, Date, Type, Description/Customer, Quantity, Amount, Total Amount, C, R, D.
 - Table content:

#	Date	Type	Description/Customer	Quantity	Amount	Total Amount	C	R	D
▶ 1	03/11/2013	Meals PM	Required to stay for dinner - attended evening conference session	1.0000	30.0000	30.00	M		
 - Buttons on the right: Add, Edit, Delete, Clone, Mass Add Detail.

Four yellow callout boxes provide instructions:

1. The detail line displays in the browse. Use the expand/collapse options to view the details of the record.
2. Detail line records can be edited, deleted, or cloned.
3. Mass Add Detail can be used to add multiple detail lines at the same time.
4. Click Submit For Approval when finished.

Slide 9 - Slide 9

Submit Request - 05.12.10.00.00 - Windows Internet Explorer

Skyward School District

Angela Avilezscr We value your feedback

Home Employee Information Time Off True Time FastTrack Open Positions Work Requests Account Master Budget Management Purchasing Inventory Requisitions Employee Review Expense Reimbursement Online Open Enrollment

Submit Request

Views: General Filters: *Skyward Default

Reimbursement Number	Req Sts	Date Entered	Expenses From	Expenses To	Reimburs Amount
0000000002	APP	03/11/2013	03/11/2013	03/11/2013	30.00

The reimbursement request displays in the browse and is Awaiting Approval.

An unapproved request can be printed, edited, deleted, or cloned.

Use the Notes and Attach buttons to add a note or attachment.

A request with a note or attachment will be flagged with an asterisk on the respective button.

This concludes the tutorial.

Print, Submit Request, Add, Edit, Delete, Notes, * Attach, Clone

10 1 records displayed Reimbursement Number: