

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' list on the right side, including '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 reference to 'CSUG\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 FastTrack Work Account Budget Purchasing Inventory Requisitions Employee Review Expense Reimbursement Online Open Enroll

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	Ent
There are no records to display; check your filter settings.									

Click Add.

10 0 records displayed Reimbursement Number:

Local intranet 100%

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 instructions:

- 1. The Expense Reimbursement Request Maintenance screen displays.** (Yellow callout box at the top)
- 2. Enter the Expenses From and To date range.** (Yellow callout box pointing to the date fields: \* Expenses From: 03/11/2013 \* To: 03/11/2013)
- 3. Enter a Purpose for Reimbursement description.** (Yellow callout box pointing to the "Conference" text in the Purpose for Reimbursement field)
- 4. Click Save to continue or Back to cancel.** (Yellow callout box pointing to the Save and Back buttons)

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 School District web application interface. The main window is titled "Expense Reimbursement Request Maintenance" and displays a form for creating or editing a request. The form includes fields for "Reimbursement For:" (Angela Avilezscr), "Expenses From:" (03/11/2013), "To:" (03/11/2013), and "Purpose for Reimbursement:" (Conference). A yellow callout box is overlaid on the form, providing instructions for the "Edit Master", "Notes", "Attachments", "Submit for Approval", and "Save and Finish Later" options. The "Submit for Approval" button is shown as inactive, while the "Save and Finish Later" button is active. The interface also includes a navigation menu at the top and a table of records at the bottom.

**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: [ ]

Total Reimbursement Amount: [ ]

**Expense Reimbursement Details**

Views: General Filters: [ ]

#	Date	Type	Amount	Total Amount	C	R	D
There are no records to display.							

**Expense Reimbursement Information**

The **Edit Master** link allows you to return to the previous screen and modify the request.

The **Notes** link allows you to enter a note regarding the request.

The **Attachments** link allows you to attach receipts or other pertinent documentation to the request.

The **Submit for Approval** button is inactivated until the detail is completed.

The **Save and Finish Later** button is active and allows you to save and return to finish the request later.

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**Expense Reimbursement Request Maintenance**

**Expense Reimbursement Information**

Reimbursement For:  Edit Master

Expenses From:  To:  1 Day Notes

Purpose for Reimbursement:  \* Attachments

Reimbursement payment option:  Submit For Approval

Total Reimbursement Amount:  Save and Finish Later

**Expense Reimbursement Detail Lines**

Views:  Filters:

#	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.

Buttons: Add, Clone, Mass Add Detail

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**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

The Expense Reimbursement Information carries forward from the previous screen.

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 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	More
Total:		30.00	100.00	

Asterisk (\*) denotes a required field

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**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: \$30.00

**Expense Reimbursement Detail Lines**

Views: General Filters: \*Skyward Default

#	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		

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.



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Submit Request - 05.12.10.00.00 - Windows Internet Explorer

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 Enrollr

**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:

Local intranet 100%