

Budget Transfer Approval

You will receive an email to alert you when there is a budget transfer waiting to be approved. Budget transfers do not show up on the alert button like Purchase Order Requisitions do. To approve the transfer go to Financial Management (FM), Account Management (AM), Budget Management (BM), Transfers (TR), Approvals (AP).

Approvals - Windows Internet Explorer

http://www.skyward.com/deptdocs/Corporate/Documentation/Public%20Website/Tutorials/Software/WF_...

Approvals

Skyward Financial Management: FM - 10636 (04.10.01.02.00) - Windows Internet Explorer

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Exit

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Skyward School District | User Name: Pamela Dubuissonscr | Examples | Friday, May 7th, 2010

Product Setup | Account Management | Vendors | Purchasing | Accounts Payable | Accounts Receivable | Fixed Assets | Inventory | School Based Activity Acct | Custom Reports | Federal/State Reporting

Product Setup | Account Master | Budget Management | Gen. Input | Project/Grant Management | Reports

Product Setup | Requisitions | Budget Entry | Transfers

Submit Transfers | Approvals | Activity

Once your approvers are set up, go to FM\AM\BM\TR\AP.

www.skyward.com
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School Management System
Windows XP / Internet Explorer 7

Software made and supported in the U.S.A.

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Done | Internet | Protected Mode: Off | 100%

You will see a screen with the transfers waiting for your approval. Click the arrow to the left of the line item to see the details for the transfer. You can click on the account number to view the account and available funds. Check the approve box to approve the transfer, or the deny box to deny the transfer. Once you have approved or denied, click submit approvals and denials.

The screenshot shows a web browser window displaying an 'Approvals' page. The page includes a summary section with statistics on approved and denied transactions, a table of pending approvals, and a sidebar with action buttons. Six yellow callout boxes provide instructions on how to interact with the interface.

1. The top **browse** shows totals for what you're going to approve and deny.

2. Click the + sign to see **details** regarding the budget transfer.

3. Check the box to **approve** or **deny** the budget transfer.

4. If there are budget **transfers** waiting to be approved at levels **below** yourself you can see those and **approve** them. The transfers will be **approved** up to your level.

5. You can also **edit** the transfer, add **notes**, or **attach** a file.

6. Click to **submit** approvals and denials.

Create Date	BT Group	S	Approve	Deny	Batch	Description	Debit Amount	Credit Amount
05/10/2010	001	S	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09-00011	Funds transfer	500.00	500.00

1 records displayed

After submitting the transfer, click yes or no to the prompt.

The screenshot shows a web browser window displaying a confirmation dialog box titled "Submit Approvals and Denials". The dialog contains the following text:

1 approved transaction
0 denied transaction
Approved Amount: \$500.00
Denied Amount: \$0.00
Would you like to submit these transactions?

There are two buttons at the bottom of the dialog: "Yes" and "No". A yellow callout box points to the "Yes" button with the text: "After submitting approvals and denials click Yes or No to the prompt."

The background of the browser window shows a table of transactions with the following data:

Create Date	BT Group	S	Approve	Deny	Batch	Description	Debit Amount	Credit Amount
05/10/2010	001	S	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09-00011	Funds transfer	500.00	500.00

Summary statistics at the top of the page:

- Number of Transactions Approved: 1
- Total Amount Approved: \$500.00
- Number of Transaction Denied: 0
- Total Amount Denied: \$0.00

Navigation and utility buttons include: Submit Approvals and Denials, Filter Options, Refresh, Edit, Notes, Attach, Transactions Awaiting Lower Level Approval, and Back.