

HOW TO APPROVE A CHECK REQUEST IN SKYWARD WEB MODULE

The screenshot shows the Skyward Web Financial Management interface for Pine Tree Independent School District. The browser window title is "Web Financial Management - WF - 10636 - 05.13.06.00.05-10.2 - Windows Internet Explorer". The URL is "https://skyweb.ptisd.org/scripts/wfisa.dll/WSservice=wsFin/fmhome01.w". The user is logged in as Tammy Torres.

The interface includes a navigation bar with links: Home, Account Management, Vendors, Purchasing, and Accounts Payable. The main section is titled "Financial Management".

On the left, there are several widgets: "Jump to Other Dashboards" (with links to Calendar, Skyward User, Employee, Task Manager, and Reset Dashboards), "Notifications" (showing no unread notifications), "My Print Queue" (showing two completed jobs), "Credit Card Transactions Awaiting My Approval" (showing no access), and "Weather" (showing conditions for Longview, TX).

In the center, there is a "Calendar Events" section (showing no events), a "Favorites" section (with links to Employee Access, Quick Entry, My Requests, Unsubmitted, Financial Management, Requisitions, Approve, Submit, View My Purchase Orders, Approve Requisitions, Vendor Browse, Operating Statement Accounts, and Edit Favorites), and a "Task Manager (17)" section (showing three tasks: Requisition Approval on Mar 05, Mar 20, and Apr 13).

On the right, there is a "Jump to Other Systems" section (with links to Employee Access, Financial Management, and Product Setup), a "District Information" section (showing the school's address), a "Web Favorites" section (with a link to Add Web Favorite), a "Customer Access Requests" section (showing no setup), and an "Available Funds" section (showing budget totals).

A blue arrow labeled "1." points to the "Financial Management" link in the "Jump to Other Systems" section.

1.) FROM THE SKYWARD WEB MODULE HOME SCREEN CLICK ON FINANCIAL MANAGEMENT.

Web Financial Management - WF - 10636 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/sfmbom01.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Ven **2.** Accounts Payable

Accounts Payable Setup

Invoice Activity
 Automated Clearing House
 Reports

Expense Reimbursement Setup

Generate Invoices
 History

Credit Cards Setup

Review/Submit Transactions
 Approve Transactions
 Activity
 Reports

3.

Check Requests Setup

Submit
 Approve
 Activity
 Generate Invoices

You do not have any unread notifications.

My Print Queue

Job	Status
R/E Sum Rpt: TEST 08/2013	Completed
R/E Sum Rpt: TEST 08/2013	Completed

Credit Card Transactions Awaiting My Approval

You do not have access to approve credit card transactions

Weather

Displaying weather for 75608 (change)
 Conditions for Longview, TX at 3:52 pm CDT
 Tuesday, August 06, 2013

Financial Management

Requisitions

Approve

Submit

View My Purchase Orders

Approve Requisitions

Vendor Browse

Operating Statement Accounts

Edit Favorites

Task Manager (17)

Date	Task Summary	Subject
Mon Mar 05 10:41am	Requisition Approval	0000016567
Tue Mar 20 8:11am	Requisition Approval	0000016745
Fri Apr 13 2:03pm	Requisition Approval	0000017166

PO BOX 5878
 LONGVIEW TX 75608

Web Favorites

Add links to your favorite sites on the web.
 Add Web Favorite

Customer Access Requests

You are not setup to use Customer Access

Available Funds

as of 08/06/13 at 2:00 AM

Expense Budget Totals - EXPENDITURE ACCOUNTS
 Budget Amount: \$13,416,608.88

2.) CLICK ON THE **ACCOUNTS PAYABLE** TAB.

3.) CLICK ON **APPROVE**.

Approve - WPVAP\CHIAQ - 26418 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/fapcrbws002.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing **Accounts Payable**

Approve Favorites New Window My Print Queue

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: PURCHASING Refresh

	Date Entered	PO Vendor Name Grp#	Request Description	Entered By	Approve	Deny	Vendor State	Due Da
1	08/05/2013	936 LVOA	150.00 VOLLEYBALL SCRIMMAGE FEES FOR 2013 SEASO	ENGLISH, MARY J	<input type="checkbox"/>	<input type="checkbox"/>	TX	08/05/2
2	08/05/2013	913 TSNAP	25.00 TSNAP MEMBERSHIP FOR DEBBIE TERRY	JOHNSTON, SUSAI	<input type="checkbox"/>	<input type="checkbox"/>	TX	08/05/2

50 2 records displayed Date Entered:

View Edit Notes **Attach Requests Awaiting Lower Level Approval

HERE IS AN EXAMPLE OF WHAT YOU WILL SEE IN YOUR QUEUE FOR APPROVAL.

Approve - WFIAP/CHIAQ - 26418 - 05.13.06.00.05-102 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/fapcbrws002.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Approve

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: PURCHASING Refresh

Date Entered	PO Vendor Name Grp	Request Description	Entered By	Approve	Deny	Vendor State	Due Date	View
08/05/2013	936 LVOA	150.00 VOLLEYBALL SCRIMMAGE FEES FOR 2013 SEASO	ENGLISH, MARY J			TX	08/05/2013	View

Expand All Collapse All Modify Details (displaying 3 of 3) View Printable Details

4.

5.

Check Request Information

Check Request #: 000000000001158 Invoice #: VB SCRIMMAGE FEES
 Invoice Date: 08/05/2013 Request Amount: 150.00
 Due Date: 08/05/2013 Do not mail: No
 PO Group: 936 - ATHLETICS
 Description: VOLLEYBALL SCRIMMAGE FEES FOR 2013 SEASON
 Vendor: LVOA 600 LEOTA ST LONGVIEW TX 75601
 Entered By: ENGLISH MARY J on 08/05/2013

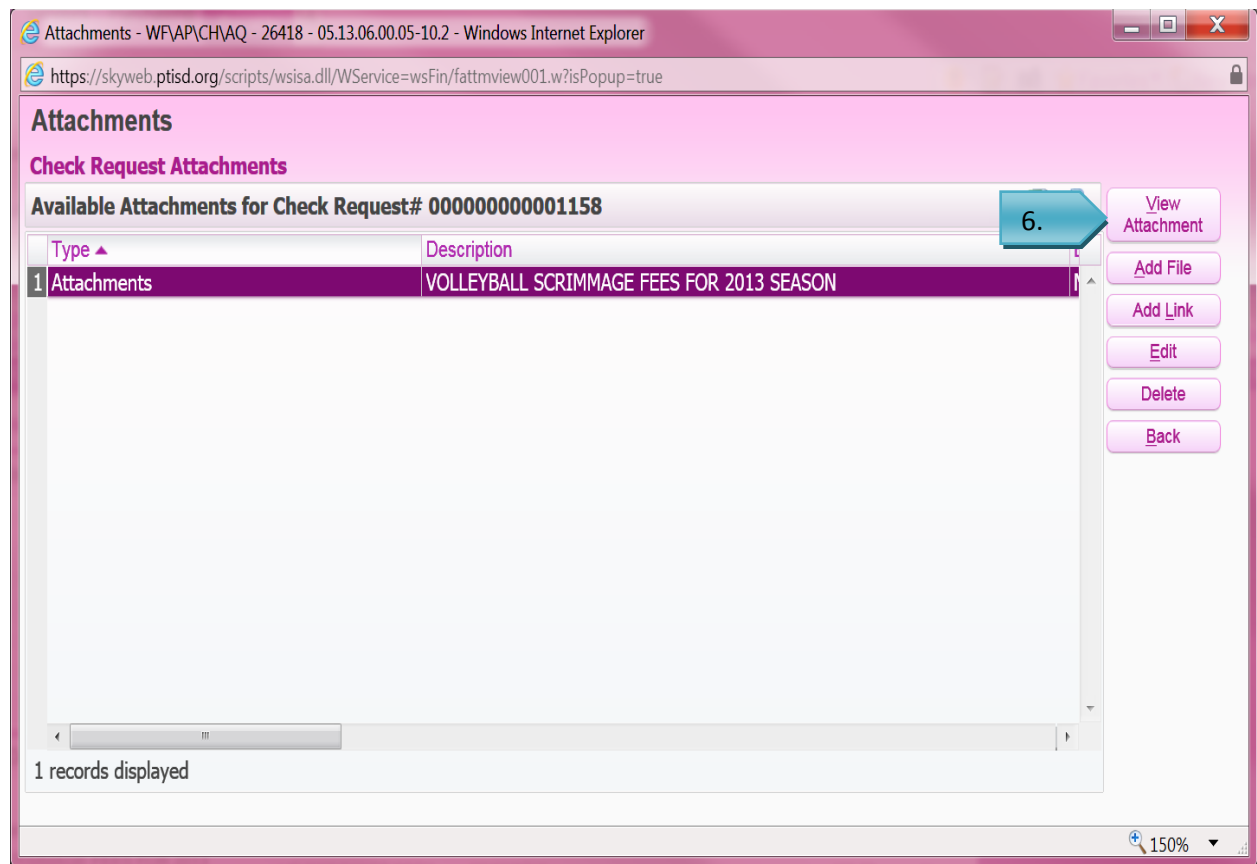
Check Request Detail Line Entries

Description	Invoice Number	Invoice Date	Detail Amount	1099
General Ledger Account Distribution			Accounting Amount	
VOLLEYBALL SCRIMMAGE FEES FOR 2013 SEASON	VB SCRIMMAGE FEES	08/05/2013	150.00	N

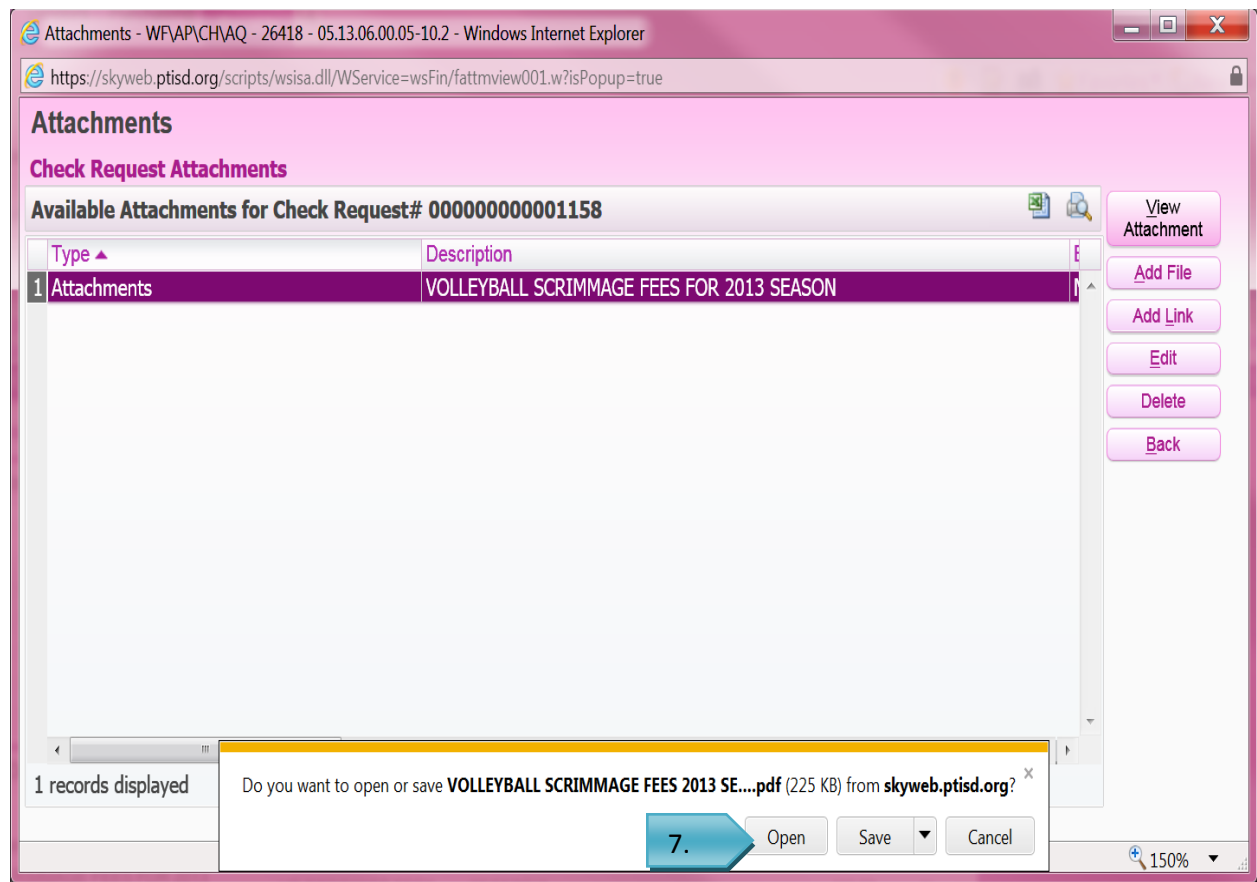
50 2 records displayed Date Entered:

4.) CLICK ON THE **LITTLE ARROW** TO EXPAND AND VERIFY ALL INFORMATION ENTERED ON THIS CHECK REQUEST SUCH AS, ADDRESS, DESCRIPTION, AND ACCOUNT CODING. (YOU MAY ALSO CLICK ON THE VIEW BUTTON TO SEE THIS SAME INFORMATION IN A DIFFERENT FORMAT).

5.) CLICK ON **ATTACH** TO SEE INVOICES/DOCUMENTATION. NOTICE THE ** WILL BE SHOWING IF SOMETHING IS ATTACHED.



6.) CLICK ON **VIEW ATTACHMENT.**



7.) CLICK ON **OPEN** TO VIEW.

VOLLEYBALL SCRIMMAGE FEES 2013 SEASON.pdf - Adobe Reader

File Edit View Window Help

1 / 1 87.3% Tools Sign Comment

1158

UIL SCRIMMAGE FEE AGREEMENT FORM

VOLLEYBALL

Pursuant to University Interscholastic League (UIL) guidelines, the Longview
Chapter has agreed to provide volleyball officials for the scrimmage between ____
Pine Tree High School and TBA.

The fee for the scrimmage will be \$50 for each field/court. If the scrimmage exceeds a
three (3) hour time period, an additional \$25 will be charged per field/court per hour.
The home team is responsible for the timely payment to the Chapter (not individuals).
Individual officials still may be paid for mileage and/or meals if the school desires.

Total amount due to the Chapter is \$ 150.00. (NOTE: Three courts are scheduled.)

Please make check payable to:

Longview Volleyball Officials Association (LVOA)

Chapter's Tax ID #75-2164041

C/O: Karen Austin, Chapter Secretary/Treasurer

CHECK OVER WHAT HAS BEEN ATTACHED.

Approve - WFIAP\CHIAQ - 26418 - 05.13.06.00.05 10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WServe=wsFin/fapcrbrws002.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Approve

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: PURCHASING Refresh

Date Entered	PO Vendor Name Grp#	Request Description	Entered By	Approve	Deny	Vendor State	Due Date
08/05/2013	936 LVOA	150.00 VOLLEYBALL SCRIMMAGE FEES FOR 2013 SEASO	ENGLISH, MARY J	<input type="checkbox"/>	<input type="checkbox"/>	TX	08/05/2013

Expand All Collapse All Modify Details (displaying 3 of 3) View Printable Details

▼ Check Request Information

Check Request #: 000000000001158 Invoice #: VB SCRIMMAGE FEES
 Invoice Date: 08/05/2013 Request Amount: 150.00
 Due Date: 08/05/2013 Do not mail: No
 PO Group: 936 - ATHLETICS
 Description: VOLLEYBALL SCRIMMAGE FEES FOR 2013 SEASON
 Vendor: LVOA 600 LEOTA ST LONGVIEW TX 75601
 Entered By: ENGLISH MARY J on 08/05/2013

▼ Check Request Detail Line Entries

Description	Invoice Number	Invoice Date	Detail Amount	1099
General Ledger Account Distribution			Accounting Amount	
VOLLEYBALL SCRIMMAGE FEES FOR 2013 SEASON	VB SCRIMMAGE FEES	08/05/2013	150.00	N

50 2 records displayed Date Entered:

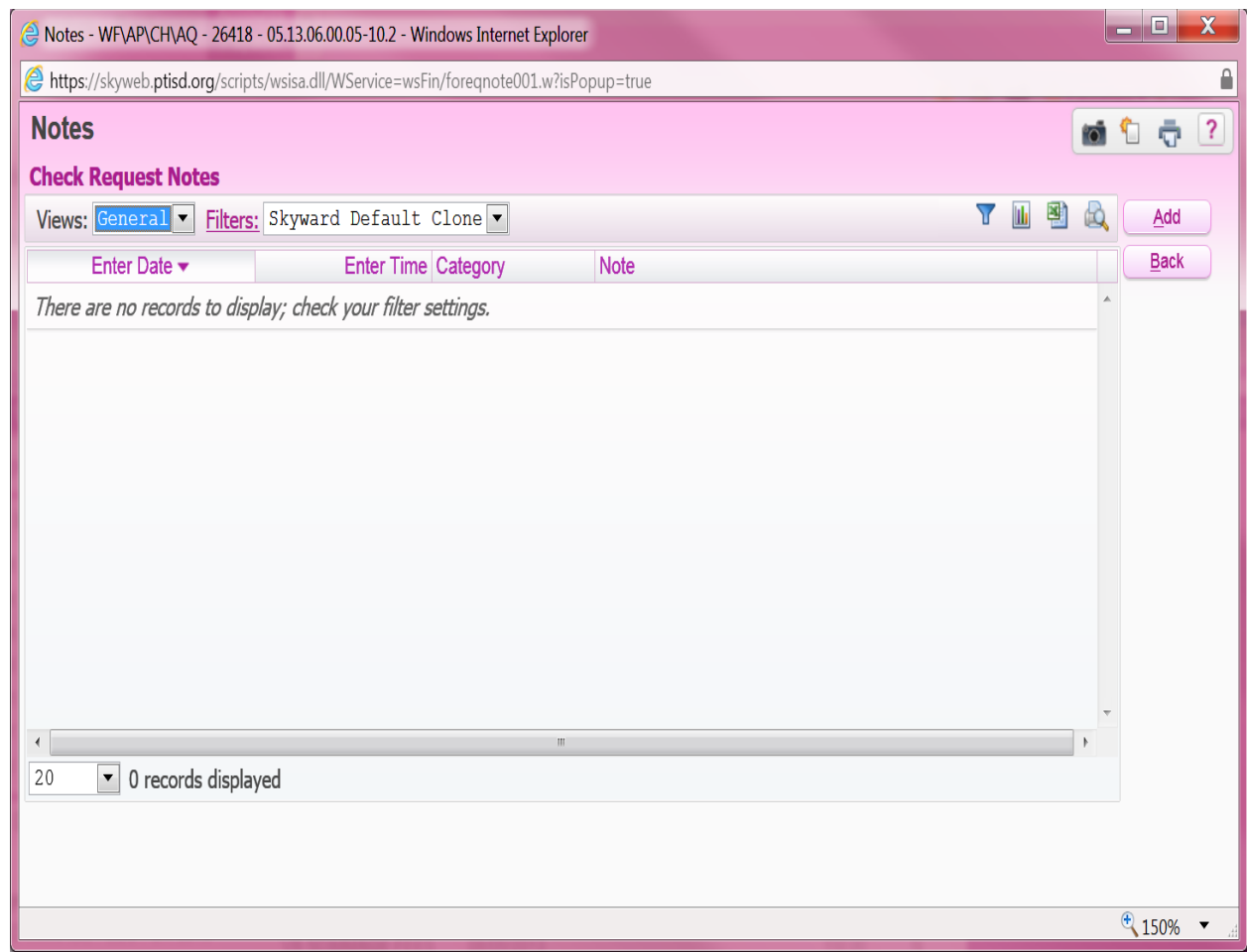
8.

Notes

**Attach

Requests Awaiting Lower Level Approval

8.) CLICK ON **NOTES**. NOTICE THERE ARE NO ** WHICH MEANS NO NOTES WERE ADDED TO THIS REQUEST. YOU CAN SKIP THIS STEP IF NO ** ARE PRESENT.



IF THERE WERE NOTES ATTACHED TO THE REQUEST HERE IS WHERE THEY WOULD COME UP ONCE YOU CLICK ON THE NOTES BUTTON.

Approve - WPAP\CHIAQ - 26418 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/tapcrbnews002.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Approve

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

10. Submit Approvals and Denials

Views: General Filters: PURCHASING Refresh

Date Entered	PO Vendor Name Grp ⁴ 2	Request / Description 3	Entered By	Approve	Deny	Vendor State	Due Da
08/05/2013	936 LVOA	150.00 VOLLEYBALL SCRIMMAGE FEES FOR 2013 SEASON	EN	9.		TX	08/05/2013

Expand All Collapse All Modify Details (displaying 3 of 3) View Printable Details

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▼ Check Request Detail Line Entries

Description	Invoice Number	Invoice Date	Detail Amount	1099
General Ledger Account Distribution			Accounting Amount	
VOLLEYBALL SCRIMMAGE FEES FOR 2013 SEASON	VB SCRIMMAGE FEES	08/05/2013	150.00	N

50 2 records displayed Date Entered:

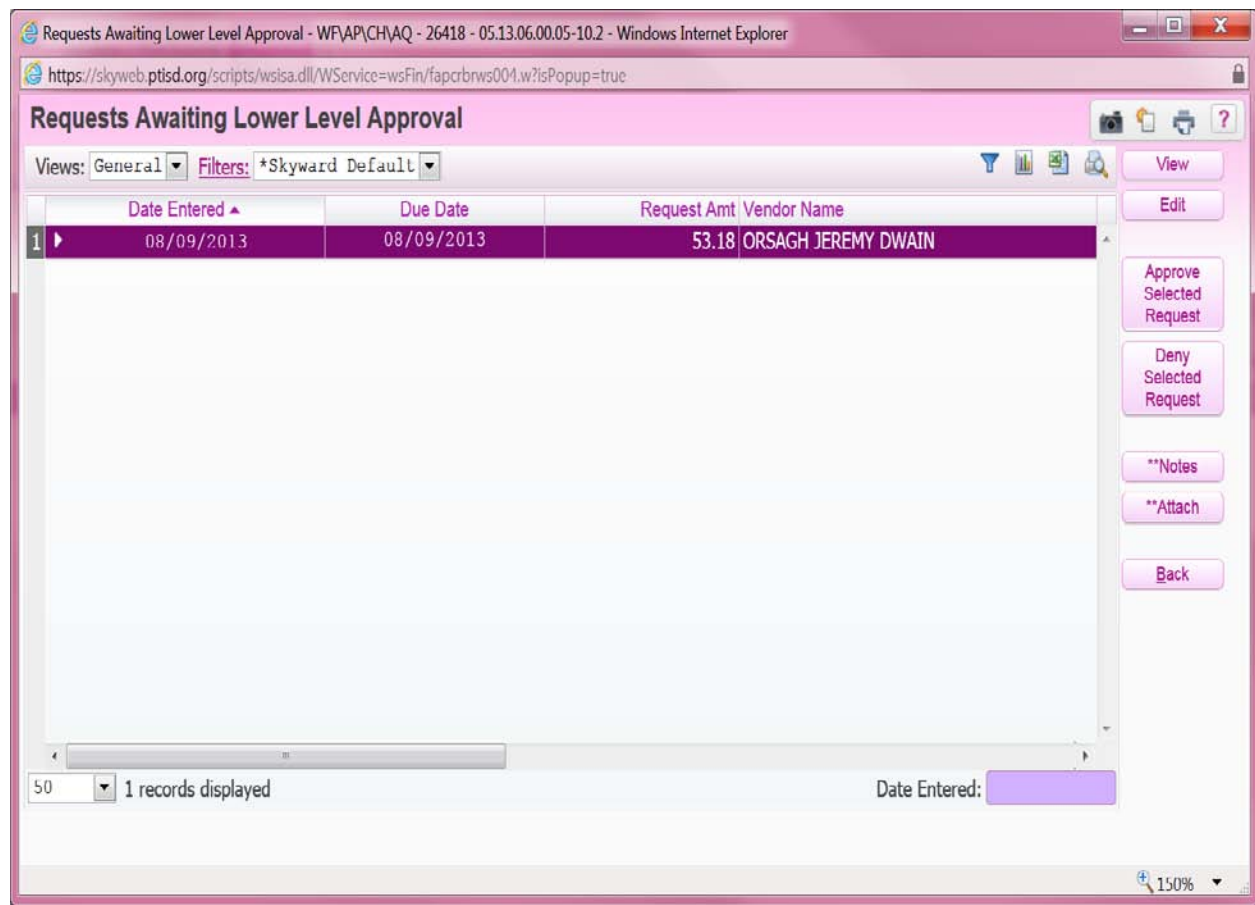
11. Requests Awaiting Lower Level Approval

AFTER YOU HAVE CHECKED EVERYTHING FOR ACCURACY:

9.) YOU WOULD CLICK THE **APPROVE OR DENY CHECKBOX. (IF YOU HIT DENY A BOX WILL POP UP WHERE YOU MAY ENTER THE REASON FOR DENIAL).**

10.) CLICK **SUBMIT APPROVALS AND DENIALS.**

11.) ON THIS SCREEN YOU ALSO HAVE THE OPTION TO VIEW LOWER LEVEL REQUESTS BY CLICKING ON THE **REQUESTS AWAITING LOWER LEVEL APPROVAL BUTTON.**



YOU SHOULD SEE ALL REQUESTS THAT ARE COMING UP THE CHAIN OF APPROVAL BUT HAVE NOT REACHED YOU YET.

THIS CONCLUDES THE TUTORIAL ON HOW TO APPROVE A CHECK REQUEST IN SKYWARD WEB MODULE.