# TABLE OF CONTENTS

## Student Management Quick Start Courses

<table>
<thead>
<tr>
<th>Course</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities Setup and Usage Quick Start Course</td>
<td>5</td>
</tr>
<tr>
<td>Attendance Quick Start Course</td>
<td>5</td>
</tr>
<tr>
<td>Behavior Management Quick Start Course</td>
<td>5</td>
</tr>
<tr>
<td>Fee Management Quick Start Course</td>
<td>5</td>
</tr>
<tr>
<td>Food Service Quick Start Course</td>
<td>6</td>
</tr>
<tr>
<td>Fundamentals of Student Management Quick Start Course</td>
<td>6</td>
</tr>
<tr>
<td>Gradebook and Teacher Access Setup Quick Start Course</td>
<td>7</td>
</tr>
<tr>
<td>Grading Quick Start Course</td>
<td>7</td>
</tr>
<tr>
<td>Lockers Quick Start Course</td>
<td>7</td>
</tr>
<tr>
<td>Online Forms Setup and Usage Quick Start Course</td>
<td>8</td>
</tr>
<tr>
<td>Reporting (Student Records) Quick Start Course</td>
<td>8</td>
</tr>
<tr>
<td>Scheduling - Current Year Quick Start Course</td>
<td>8</td>
</tr>
<tr>
<td>Scheduling - Future Year Quick Start Course</td>
<td>9</td>
</tr>
<tr>
<td>Security (Student Records) Quick Start Course</td>
<td>9</td>
</tr>
</tbody>
</table>

## Student Management General and Mastery Courses

<table>
<thead>
<tr>
<th>Course</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities Setup and Usage Mastery Course</td>
<td>11</td>
</tr>
<tr>
<td>Assessment General Course</td>
<td>11</td>
</tr>
<tr>
<td>Attendance Mastery Course</td>
<td>11</td>
</tr>
<tr>
<td>Behavior Management Mastery Course</td>
<td>11</td>
</tr>
<tr>
<td>Career Plans General Course</td>
<td>11</td>
</tr>
<tr>
<td>Customization (Student Records) General Course</td>
<td>12</td>
</tr>
<tr>
<td>Data Mining (Student Records) General Course</td>
<td>12</td>
</tr>
<tr>
<td>Endorsements General Course</td>
<td>12</td>
</tr>
<tr>
<td>Family/Student Access Setup and Usage General Course</td>
<td>12</td>
</tr>
<tr>
<td>Fee Management Mastery Course</td>
<td>13</td>
</tr>
<tr>
<td>Food Service Mastery Course</td>
<td>13</td>
</tr>
<tr>
<td>Food Service Point of Sale Specialty Course</td>
<td>13</td>
</tr>
<tr>
<td>Fundamentals of Student Management Mastery Course</td>
<td>14</td>
</tr>
<tr>
<td>General Navigation (Student Records) General Course</td>
<td>14</td>
</tr>
<tr>
<td>Gradebook and Teacher Access Setup Mastery Course</td>
<td>15</td>
</tr>
<tr>
<td>Grading Mastery Course</td>
<td>15</td>
</tr>
<tr>
<td>Graduation Planning General Course</td>
<td>15</td>
</tr>
<tr>
<td>Guidance General Course</td>
<td>16</td>
</tr>
<tr>
<td>Health Records Entry Specialty Course</td>
<td>16</td>
</tr>
<tr>
<td>Health Services General Course</td>
<td>16</td>
</tr>
<tr>
<td>Lockers Mastery Course</td>
<td>17</td>
</tr>
<tr>
<td>New Student Enrollment General Course</td>
<td>17</td>
</tr>
<tr>
<td>Online Forms Setup and Usage (Student Records) Mastery Course</td>
<td>17</td>
</tr>
<tr>
<td>Reporting (Student Records) Mastery Course</td>
<td>17</td>
</tr>
<tr>
<td>Scheduling - Current Year Mastery Course</td>
<td>18</td>
</tr>
<tr>
<td>Scheduling - Future Year Mastery Course</td>
<td>18</td>
</tr>
<tr>
<td>Security (Student Records) Mastery Course</td>
<td>19</td>
</tr>
<tr>
<td>Standards-Based Gradebook for Teachers Specialty Course</td>
<td>19</td>
</tr>
<tr>
<td>System Administration (Student Records) General Course</td>
<td>19</td>
</tr>
<tr>
<td>Traditional Gradebook for Teachers Specialty Course</td>
<td>20</td>
</tr>
<tr>
<td>Transportation General Course</td>
<td>20</td>
</tr>
<tr>
<td>Year End (Student Records) General Course</td>
<td>20</td>
</tr>
</tbody>
</table>
# QMLATIV PDC Catalog

## Table of Contents

### School Business Quick Start Courses

- Accounts Payable Quick Start Course 22
- Accounts Receivable Quick Start Course 22
- Assets Quick Start Course 22
- Bank Reconciliation Quick Start Course 23
- Benefit Management Quick Start Course 23
- Budgeting Quick Start Course 23
- Data Mining (Business Systems) Quick Start Course 23
- Employee Access Setup and Usage Quick Start Course 24
- Fundamentals of Financial Management Quick Start Course 24
- Fundamentals of Human Resources Quick Start Course 24
- Knowledge Hub Setup and Maintenance 25
- Online Forms Setup and Usage (Business Systems) Quick Start Course 25
- Payroll Quick Start Course 25
- Purchasing Quick Start Course 25
- Reporting (Business Systems) Quick Start Course 26
- Security (Business Systems) Quick Start Course 26
- Staff Planning Quick Start Course 26
- Substitute Tracking Quick Start Course 27
- Time Off Quick Start Course 27
- Time Tracking Quick Start Course 27
- Warehouse Quick Start Course 27

### School Business General and Mastery Courses

- Accounts Payable Mastery Course 29
- Accounts Receivable Mastery Course 29
- Assets Mastery Course 29
- Bank Reconciliation Mastery Course 30
- Benefit Management Mastery Course 30
- Budgeting Mastery Course 30
- Customization (Business Systems) General Course 30
- Data Mining (Business Systems) General Course 30
- Employee Access Setup for Employees Specialty Course 31
- Employee Access Setup and Usage Mastery Course 31
- Fundamentals of Financial Management Mastery Course 31
- Fundamentals of Human Resources Mastery Course 32
- General Navigation (Business Systems) General Course 32
- Online Forms Setup and Usage (Business Systems) Mastery Course 32
- Payroll Mastery Course 33
- Purchasing Mastery Course 33
- Reporting (Business Systems) Mastery Course 33
- Security (Business Systems) Mastery Course 34
- Staff Planning Mastery Course 34
- Substitute Tracking Mastery Course 34
- System Administration (Business Systems) General Course 35
- Time Off Mastery Course 35
- Time Tracking Mastery Course 35
- Warehouse Mastery Course 36
- Year End - Financial Management 36
- Year End - Human Resources 36

### Federal Compliance Courses

### State Compliance Courses
STUDENT MANAGEMENT QUICK START COURSES

Student Management Quick Start Courses

<table>
<thead>
<tr>
<th>Course</th>
<th>Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities Setup and Usage Quick Start Course</td>
<td>5</td>
</tr>
<tr>
<td>Attendance Quick Start Course</td>
<td>5</td>
</tr>
<tr>
<td>Behavior Management Quick Start Course</td>
<td>5</td>
</tr>
<tr>
<td>Fee Management Quick Start Course</td>
<td>5</td>
</tr>
<tr>
<td>Food Service Quick Start Course</td>
<td>6</td>
</tr>
<tr>
<td>Fundamentals of Student Management Quick Start Course</td>
<td>6</td>
</tr>
<tr>
<td>Gradebook and Teacher Access Setup Quick Start Course</td>
<td>7</td>
</tr>
<tr>
<td>Grading Quick Start Course</td>
<td>7</td>
</tr>
<tr>
<td>Lockers Quick Start Course</td>
<td>7</td>
</tr>
<tr>
<td>Online Forms Setup and Usage Quick Start Course</td>
<td>8</td>
</tr>
<tr>
<td>Reporting (Student Records) Quick Start Course</td>
<td>8</td>
</tr>
<tr>
<td>Scheduling - Current Year Quick Start Course</td>
<td>8</td>
</tr>
<tr>
<td>Scheduling - Future Year Quick Start Course</td>
<td>9</td>
</tr>
<tr>
<td>Security (Student Records) Quick Start Course</td>
<td>9</td>
</tr>
</tbody>
</table>
Activities Setup and Usage

**Course Overview:** In this course, you will learn how to create and maintain Activity codes and student activity records.

**Goals:**
- Utilize activity functionality.
- View student information in Activity Access.

Attendance

**Course Overview:** Learn about creating an attendance calendar, configuring details such as how many class periods are in a day, entering attendance records, and creating student attendance reports.

**Goals:**
- Create and maintain attendance codes.
- Create and maintain attendance calendars.
- Enter and maintain individual student attendance records.
- Produce attendance reports.

Behavior Management

**Course Overview:** This course will help you to keep track of students' behavioral issues; once you've created the codes and set up the configurations that you will use in the Discipline module, you can then track student discipline incidents. We will focus on entering offense and action records for specific students from the administrative side.

**Goals:**
- Maintain discipline Offense and Action codes.
- Maintain student discipline records.
- Produce discipline reports as needed.

Fee Management

**Course Overview:** The Fee Management module allows for the tracking of customer charges, which Skyward's software divides into three categories: Course, Activity, and General. Payments can then be applied toward these fees.

**Goals:**
- Set up the account configurations and create the codes in the Account area that are necessary for fee processing.
- Configure the fee management settings within the Entity Configuration area.
- Create Fee codes and Payment Type codes.
- Create Fee Management customers.
- Record student fees and payments.
- Complete fee transactions such as deleting student fees, creating fee reversals, applying unapplied payments, reimbursing payments, and processing NSF checks.
- Utilize and generate Fee Management reports.
- Process Fee Management year end utilities.
Food Service

Course Overview: You’ll learn all you need to know about maintaining customer and payor records as well as the Point of Sale feature. You will also be able to generate the necessary reports for both state reporting purposes and to maintain your Food Service department.

Goals:

- Maintain account system and district configurations.
- Create and maintain general ledger accounts, bank accounts, and account groups.
- Configure food service accounting settings.
- Create and maintain customer information, payor accounts, and payor applications.
- Configure and utilize the Point of Sale feature.
- Maintain purchase and payment transactions.
- Generate and utilize Food Service reports.

Fundamentals of Student Management

Course Overview: Learn how to complete preliminary setup in your database. This includes creating Student Profiles to keep track of demographic, family, and school enrollment information and how to use features such as automatic alerts.

Goals:

- Create and maintain codes.
- Create new students and attach families to students.
- Attach information to the Student Profile.
- Create and maintain Homeroom records.
- Identify and use appropriate utilities for the mass assign homerooms processes.
- Identify and use appropriate utilities for the mass assign advisors processes.
- Withdraw students.
- Complete status changes.
- Process no show records.
- Attach and maintain family information for students.
- Process enrollment and student reports.
- Utilize the Message Center.
Gradebook and Teacher Access Setup

Course Overview: We’ll cover how administrators can set up codes and configurations, and how that affects what the teachers can see and do in their gradebooks. We’ll also show how teachers will be using their gradebooks to view and maintain data on the students in their classes. Additionally, we will cover some of the different reports that are available, both administratively and through Teacher Access.

Goals:
- Create and maintain gradebook-related codes.
- Maintain attendance records.
- Maintain gradesheet settings within a gradebook.
- Create and maintain assignments within the gradebook.
- Score assignments utilizing all scoring functions.
- Create and maintain online assignments.
- Navigate the gradebook and view student information.
- Transfer grades for new students in your class.
- Produce gradebook reports through Teacher Access.
- Enter grade overrides and percent adjustments, as well as report card comments.
- Configure and process grade change requests.
- Enter grade change requests through Teacher Access.
- Process administrative gradebook reports.

Grading

Course Overview: This course will walk you through the setup of the Grading module so you can effectively track student grades, maintain student grading records, and generate reports based on the grading information you generated.

Goals:
- Create and maintain grading codes.
- Set up and maintain configuration settings for the Grading module.
- Process necessary grading utilities.
- Maintain the grading information in the Student Profile.
- Create and maintain grading codes for Honor Roll and Rank.
- Interpret GPA through Honor Roll and Rank.
- Generate grading reports for Honor Roll and Rank.
- Set up and maintain grading configuration settings for report cards and generate report cards.
- Generate reports from the Grading module.

Lockers

Course Overview: This course will teach you how to set up and maintain Lock and Locker codes and attach these codes to students.

Goal:
- Utilize locker functionality.
Online Forms Setup and Usage (Student Records)

Course Overview: The Online Form module allows you to create forms that guardians may complete online in Family Access and teachers can complete in Teacher Access. You will also be able to view forms that have not yet been started and process online form approvals once they’ve been submitted.

Goals:
- Create and maintain online forms and steps.
- Upload files into the Online Form Attachment area.
- Create and maintain online forms and steps for Family Access and Teacher Access.
- Approve, deny, and delete users’ online forms.

Reporting (Student Records)

Course Overview: Learn how you can design and run custom reports about any information in your database and how to assign who has access to those reports.

Goals:
- Create, clone, and run a report.
- Understand the Report Designer.
- Utilize formatting and properties.
- Add text to a report.
- Add and sort sections and lines on a report.
- Configure report filters and prompts.
- Configure report security.
- Utilize the Report Designer, Report, and My Report Queue areas.
- Import and export reports.

Scheduling - Current Year

Course Overview: You will learn how course and section information is created so students can be placed into classes, and how to create meeting patterns so you can define what period the classes will meet and which teachers will lead the classes. You’ll also learn how to efficiently complete day-to-day scheduling processes, individually and en masse.

Goals:
- Create and maintain curriculums.
- Add and maintain staff records.
- Create and maintain courses within the Course List, sections within a course, and meets within a section.
- Create and maintain scheduling student codes.
- Create and manipulate individual student schedules appropriately.
- Use individual and mass utilities for the creation of student schedules.
- Configure Cross Entity Course Scheduling (CECS) and learn how it interacts with other modules.
- Set up courses offered to and from your entity.
- Generate and utilize student and teacher reports.
Scheduling - Future Year

Course Overview: This course will show you how course and section information is created so students can be placed into classes, and how to create meeting patterns so you can define what period the classes will meet and which teachers will lead the classes. It will also guide you in creating student schedules and making modifications to those schedules, if necessary.

Goals:
- Process the Mass Enroll Students utility.
- Create and maintain Scheduling codes and curriculums.
- Add and maintain staff records.
- Create and maintain courses within the Course List, sections within a course, and meets within a section.
- Create and maintain scheduling categories, scheduling teams, and scheduling groups.
- Add and maintain individual and mass student course requests.
- Generate and utilize reports to verify course requests.
- Create schedule restore points.
- Process the Update Estimated Number of Sections and Initialize Meet Details utilities.
- Run the section scheduler processes.
- Create and manipulate individual student schedules.
- Use scheduling utilities.
- Configure Cross Entity Course Scheduling (CECS) and learn how it interacts with other modules.
- Set up courses offered to and by your entity.
- Generate and utilize student and teacher reports.

Security (Student Records)

Course Overview: This course covers security configurations such as timeout settings, configuring usernames, and how to create new users in the system with appropriate security access.

Goals:
- Maintain security system configurations.
- Create security users, security groups, and roles.
- Set up screen security and maintain security roles.
- Set up and maintain security groups.
- Configure advanced functions on security groups.
- Run mass change processes to adjust security access for users.
### Student Management General and Mastery Courses

<table>
<thead>
<tr>
<th>Course</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities Setup and Usage Mastery Course</td>
<td>11</td>
</tr>
<tr>
<td>Assessment General Course</td>
<td>11</td>
</tr>
<tr>
<td>Attendance Mastery Course</td>
<td>11</td>
</tr>
<tr>
<td>Behavior Management Mastery Course</td>
<td>11</td>
</tr>
<tr>
<td>Career Plans General Course</td>
<td>11</td>
</tr>
<tr>
<td>Customization (Student Records) General Course</td>
<td>12</td>
</tr>
<tr>
<td>Data Mining (Student Records) General Course</td>
<td>12</td>
</tr>
<tr>
<td>Endorsements General Course</td>
<td>12</td>
</tr>
<tr>
<td>Family/Student Access Setup and Usage General Course</td>
<td>12</td>
</tr>
<tr>
<td>Fee Management Mastery Course</td>
<td>13</td>
</tr>
<tr>
<td>Food Service Mastery Course</td>
<td>13</td>
</tr>
<tr>
<td>Food Service Point of Sale Specialty Course</td>
<td>13</td>
</tr>
<tr>
<td>Fundamentals of Student Management Mastery Course</td>
<td>14</td>
</tr>
<tr>
<td>General Navigation (Student Records) General Course</td>
<td>14</td>
</tr>
<tr>
<td>Gradebook and Teacher Access Setup Mastery Course</td>
<td>15</td>
</tr>
<tr>
<td>Grading Mastery Course</td>
<td>15</td>
</tr>
<tr>
<td>Graduation Planning General Course</td>
<td>16</td>
</tr>
<tr>
<td>Guidance General Course</td>
<td>16</td>
</tr>
<tr>
<td>Health Records Entry Specialty Course</td>
<td>16</td>
</tr>
<tr>
<td>Health Services General Course</td>
<td>16</td>
</tr>
<tr>
<td>Lockers Mastery Course</td>
<td>16</td>
</tr>
<tr>
<td>New Student Enrollment General Course</td>
<td>16</td>
</tr>
<tr>
<td>Online Forms Setup and Usage (Student Records) Mastery Course</td>
<td>17</td>
</tr>
<tr>
<td>Reporting (Student Records) Mastery Course</td>
<td>17</td>
</tr>
<tr>
<td>Scheduling - Current Year Mastery Course</td>
<td>18</td>
</tr>
<tr>
<td>Scheduling - Future Year Mastery Course</td>
<td>18</td>
</tr>
<tr>
<td>Security (Student Records) Mastery Course</td>
<td>19</td>
</tr>
<tr>
<td>Standards-Based Gradebook for Teachers Specialty Course</td>
<td>19</td>
</tr>
<tr>
<td>System Administration (Student Records) General Course</td>
<td>19</td>
</tr>
<tr>
<td>Traditional Gradebook for Teachers Specialty Course</td>
<td>20</td>
</tr>
<tr>
<td>Transportation General Course</td>
<td>20</td>
</tr>
<tr>
<td>Year End (Student Records) General Course</td>
<td>20</td>
</tr>
</tbody>
</table>
Activities Setup and Usage

Course Overview: In this course, learn how to create and maintain Activity codes and student activity records including keeping track of academic or extra-curricular activities and the students and staff that participate.

Goals:
- Utilize activity functionality.
- View student information in Activity Access.

Assessment

Course Overview: The Assessment course will show you all you need to know in order to create and maintain student assessment records.

Goals:
- Enter and maintain individual student assessment records.
- Import student assessment records from a data file.

Attendance

Course Overview: You will learn about creating an attendance calendar, configuring details such as how many class periods are in a day, entering attendance records, and creating student attendance reports.

Goals:
- Create and maintain attendance codes.
- Configure attendance settings.
- Create and maintain attendance calendars.
- Enter and maintain individual student attendance records.
- Produce attendance reports.

Behavior Management

Course Overview: This course will focus on entering offense and action records for specific students from the administrative side, as well as how teachers can enter warnings and referrals and process discipline reports.

Goals:
- Maintain discipline codes, discipline configuration options, and student discipline records.
- Produce discipline reports as needed.

Career Plans

Course Overview: Career Plans enable students to choose which curricula they will use to meet the requirements of their graduation plan. You must determine the grade levels students can select, as well as which curricula are available. Once these pieces are configured, you must set up the time periods when students can declare their career plans.

Goals:
- Maintain career plans.
Customization (Student Records)

**Course Overview:** This course covers customizing menus, views, and filters, and how to create custom modules and screens.

**Goals:**
- Configure navigation and profile menus.
- Configure district-wide views and filters.
- Understand database structure basics.
- Create custom codes and screens.
- Maintain custom screens.
- Maintain customization security settings.

Data Mining (Student Records)

**Course Overview:** This course will outline how to design and run reports based on data in specific areas of your system.

**Goals:**
- Create and run data mining reports.
- Utilize filters, sorts, and breaks for data mining reports.

Endorsements

**Course Overview:** This course will focus on creating and maintaining endorsements and attaching them to students.

**Goals:**
- Create and maintain endorsements.

Family/Student Access Setup and Usage

**Course Overview:** This course will walk you through configuring security to the Family Access and Student Access portals. You will determine what information displays in these portals, as well as how guardians and students can view that information. You can also configure the option to allow guardians to complete change requests to update their demographic information.

**Goals:**
- Configure security to enable the use of Family Access and Student Access.
- Maintain the System Configuration and Entity Group Configuration.
- Run Family/Student Access utilities.
- View the student information available to you.
- Configure the system to allow change requests.
- Approve and maintain change requests.
Fee Management

**Course Overview:** The Fee Management module allows for the tracking of customer charges, which Skyward’s software divides into three categories: Course, Activity, and General. Payments can then be applied toward these fees.

**Goals:**
- Set up the account configurations and create the codes in the Account area that are necessary for fee processing.
- Configure the fee management settings within the Entity and Entity Group Year Configuration areas.
- Create Fee codes and Payment Type codes.
- Create and maintain Fee Management customers.
- Record student fees and payments.
- Update and export payment accounting information.
- Complete fee transactions such as deleting student fees, creating fee reversals, applying unapplied payments, reimbursing payments, and processing NSF checks.
- Utilize and generate Fee Management reports.
- Process Fee Management year end utilities.

Food Service

**Course Overview:** The Food Service module allows you to keep track of customer purchases, payments, and much more. You’ll learn all you need to know about maintaining customer and payor records as well as the Point of Sale feature. You will also be able to generate the necessary reports for both state reporting purposes and to maintain your Food Service department.

**Goals:**
- Maintain account system and district configurations.
- Create and maintain general ledger accounts, bank accounts, and account groups.
- Configure food service accounting settings.
- Create and maintain customer information, payor accounts, payor applications, and direct certifications.
- Process the Verification Selection and maintain the selected applications.
- Configure and utilize the Point of Sale feature.
- Maintain purchases and payment transactions.
- Configure online payments for students and guardians.
- Generate food service reports.

Food Service Point of Sale

**Course Overview:** The Point of Sale feature allows you to keep track of customer purchases and payments. You’ll learn all you need to know about maintaining these records, as well as closing out the line at the end of service.

**Goals:**
- Configure and utilize the Point of Sale feature.
Fundamentals of Student Management

**Course Overview:** This course will teach you how to complete preliminary setup in your database. This includes creating Student Profiles to keep track of demographic, family, and school enrollment information and how to use features such as automatic alerts.

**Goals:**
- Create and maintain codes.
- Create new students.
- Create entry defaults.
- Attach families to students.
- Attach information to the Student Profile.
- Create and maintain Homeroom records.
- Identify and use appropriate utilities for the mass assign homerooms processes.
- Identify and use appropriate utilities for the mass assign advisors processes.
- View entry and withdrawal records.
- Withdraw students.
- Complete status changes.
- Process no show changes.
- Update family information.
- Record family changes and situations.
- Maintain school paths.
- Process student utilities.
- Process enrollment and student reports.
- Utilize the Message Center.

General Navigation (Student Records)

**Course Overview:** This course will provide you with a better understanding of how to navigate and utilize the system to its full potential.

**Goals:**
- Manage the options on the Home screen.
- Use columns and filters.
- Inquire on student information.
Gradebook and Teacher Access Usage

Course Overview: In this course, we’ll cover how administrators can set up the codes and configurations and how that affects what the teachers can see and do in their gradebooks. We will also show you how teachers will be using their gradebooks to view and maintain data on the students in their classes. Additionally, we’ll cover the different reports that are available, both administratively and through Teacher Access. Lastly, we’ll show you how activity personnel can gather information through Activity Access.

Goals:
- Create and maintain gradebook-related codes and process gradebook utilities.
- Maintain attendance records and seating charts.
- Create a discipline referral.
- Create and send messages in Message Center.
- Maintain gradesheet settings within a gradebook.
- Create and maintain assignments within one or more gradebooks as well as online assignments.
- Score assignments utilizing all scoring functions.
- Navigate the gradebook and view student information.
- Transfer grades for new students in your class.
- Analyze student performance.
- Produce gradebook reports through Teacher Access.
- Enter grade overrides and percent adjustments.
- Enter report card comments.
- Configure and process grade change requests.
- View the last time the gradebook was accessed.
- View student assignments and scores.
- Maintain substitute assignments.
- Process administrative gradebook reports.

Grading

Course Overview: This course will walk you through the setup of the Grading module so you can effectively track student grades, accurately calculate GPA values, maintain student grading records, and ultimately run processes and reports based on the grading information you generated.

Goals:
- Create and maintain grading codes.
- Set up and maintain configuration settings for the Grading module.
- Process necessary grading utilities.
- Configure GPA for later use on things like Honor Roll and Rank.
- Maintain course master records as they pertain to grading.
- Maintain the Grading tab in the Student Profile.
- Create and maintain grading codes for Honor Roll and Rank.
- Interpret GPA through Honor Roll and Rank.
- Generate grading reports for Honor Roll and Rank.
- Create and maintain grading codes for transcripts.
- Set up and maintain grading configuration settings for report cards and transcripts.
- Process grading utilities to assist with generating report cards and transcripts, and generate them.
Graduation Planning

**Course Overview:** We will focus on creating and maintaining graduation plans and configuring how credits will calculate for these plans. After that, you’ll learn how to assign and maintain students’ graduation plans.

**Goals:**
- Create and maintain Graduation Plans for the District and Entity.
- Maintain individual student Graduation Plans.

Guidance

**Course Overview:** This course will teach you all you need to know to track student guidance office visits, beginning with the codes and moving on to the Office Visit Queue.

**Goals:**
- Create codes needed for office visits.
- Enter office visit records and manage the Office Visit Queue.

Health Records Entry

**Course Overview:** This course will walk you through how to keep track of and update important student health information.

**Goals:**
- Create and maintain student health records individually and en masse.
- Edit or void records created in error.
- Track student medications.
- Run Medication Worksheet of what medications should be administered for a day.
- Track student procedures.
- Create and maintain student vaccination records.
- Track student compliance and keep parents informed about compliancy.
- Enter office visit records and manage the Office Visit Queue.

Health Services

**Course Overview:** Learn how to create, maintain, and track the various health records for students, such as childhood illness, diabetes care log, health conditions, medications, procedures, vaccinations, hearing, physical, and vision.

**Goals:**
- Create codes that pertain to applicable medical records.
- Create and maintain student health records individually and en masse.
- Edit or void records created in error.
- Maintain the codes needed for student medication records and track student medications.
- Run a report of the medications that are to be administered for a day.
- Create codes needed for office visits.
- Enter office visit records and manage the Office Visit Queue.
- Maintain the codes needed for student procedure records and track student procedures.
- Create district-specific Vaccine and Vaccination codes.
- Create and maintain student vaccination records.
- Track student compliance and keep parents informed about compliancy.
Lockers

**Course Overview:** This course will teach you how to set up and maintain Lock and Locker codes and attach these codes to students.

**Goal:**
- Utilize locker functionality.

New Student Enrollment

**Course Overview:** You can enable New Student Enrollment in the Family module and then use the Online Form module to create forms that guardians may complete online in the New Student Enrollment portal. We’ll show you how guardians will complete forms and how you can process New Student Enrollment form approvals once they’ve been submitted.

**Goals:**
- Configure New Student Enrollment.
- Create online forms for New Student Enrollment.
- Approve and deny New Student Enrollment applications.
- Generate New Student Enrollment reports.

Online Forms Setup and Usage (Student Records)

**Course Overview:** The Online Form module allows you to create forms that guardians may complete online in Family Access. You will also be able to view forms that have not yet been started and process online form approvals once they’ve been submitted.

**Goals:**
- Create and maintain online forms and steps.
- Upload files into the Online Form Attachment area.
- Create and maintain online forms and steps for Family Access and Teacher Access.
- Approve, deny, and delete users’ online forms.
- Mass print online forms.

Reporting (Student Records)

**Course Overview:** Learn how you can design and run custom reports about any information in your database, and how to assign who has access to those reports.

**Goals:**
- Create, clone, and run a report.
- Understand the Report Designer.
- Utilize formatting and properties.
- Add text and images to a report.
- Create calculated fields and aggregate math fields.
- Add and sort sections and lines on a report.
- Configure report filters, prompts, variables, parameters, and styles.
- Configure report security.
- Utilize the Report Designer, Report, and My Report Queue areas.
- Import, export, and replace reports.
- Configure scheduled report runs.
- Create and maintain prompt templates.
Scheduling - Current Year

Course Overview: The Scheduling - Current Year course includes a comprehensive look at the setup of the Scheduling area. You will learn how course and section information is created so students can be placed into classes, and how to create meeting patterns so you can define the periods when the classes will meet and which teachers will lead the classes. You will also learn how to efficiently complete day-to-day scheduling processes, individually and en masse.

Goals:
- Create and maintain scheduling codes and curriculums.
- Add and maintain staff codes and staff records.
- Create and maintain courses within the Course List, sections within a course, and meets within a section.
- Create and maintain sections within a course and meets within a section.
- Generate and utilize course reports.
- Create and maintain scheduling student codes.
- Create and manipulate individual student schedules appropriately.
- Use individual and mass utilities for the creation of student schedules.
- Configure Cross Entity Course Scheduling (CECS) and understand how it interacts with other modules.
- Set up courses offered to and by your entity.
- Generate and utilize student and teacher reports.

Scheduling - Future Year

Course Overview: This course includes a comprehensive look at the scheduling setup for the next year. You will learn how course and section information is created so students can be placed into classes, and how to create meeting patterns so you can define the periods when the classes will meet and which teachers will lead the classes. You will also learn how to link two or more classes together that must be taken within the same year and how to create and make modifications to student schedules.

Goals:
- Complete the preliminary scheduling processes.
- Create and maintain scheduling codes and curriculums.
- Add and maintain staff codes and staff records.
- Create and maintain courses within a Course List, sections within a course, and meets within a section.
- Create and maintain course and section corequisite groups.
- Generate and utilize course reports.
- Create and maintain scheduling categories, scheduling teams, and scheduling groups.
- Configure and maintain Family/Student Access course requests.
- Create and maintain individual and mass student course requests.
- Generate and utilize reports to verify course requests.
- Create and maintain block periods.
- Create schedule restore points.
- Process the Update Estimated Number of Sections and Initialize Meet Details utilities.
- Run the section scheduler processes and create and manipulate individual student schedules.
- Use mass scheduling utilities.
- Configure Cross Entity Course Scheduling (CECS) and understand how it interacts with other modules.
- Set up courses offered to and by your entity.
- Generate and utilize student and teacher reports.
Security (Student Records)

Course Overview: This course covers security configurations such as timeout settings, monitoring system changes that affect security, and how to set up new users of the system with appropriate access.

Goals:
- Maintain security system configurations.
- Configure alternate authentication options.
- Create security users, security roles, and security groups.
- Set up screen security and maintain security roles.
- Set up and maintain security groups.
- Configure advanced functions on security roles and security groups.
- Utilize the impersonation functionality.
- Process security setup verification reports.
- Run mass change processes to adjust security access for users.

Standards-Based Gradebook for Teachers

Course Overview: Learn how to use the gradebook to view and maintain data on your students. Additionally, learn about the different reports that are available through Teacher Access.

Goals:
- Maintain attendance records.
- Maintain gradesheet settings within a gradebook.
- Create and maintain assignments within one or more gradebooks, as well as online assignments.
- Score assignments utilizing all scoring functions.
- Navigate the gradebook and view student information.
- Transfer grades for new students in your class.
- Produce gradebook reports through Teacher Access.
- Enter grade overrides and percent adjustments, as well as report card comments.
- Enter grade change requests through Teacher Access.

System Administration (Student Records)

Course Overview: You will learn how to maintain and make modifications to your database, investigate performance issues, mass resend failed emails, and import data into nearly any table of your database.

Goals:
- Organize information by school year, district, and entity.
- Create schools and buildings to further organize data.
- Understand the use of the Name List.
- Configure options to assist in the maintenance of student records.
- Utilize the import tools available.
- Configure system settings and codes.
- Understand the information contained in the System Profile.
- Resend emails from the email queue.
- Schedule processes to automatically run at regular intervals.
- Understand and process system utilities.
- Understand and utilize the Import Designer.
Traditional Gradebook for Teachers

Course Overview: We will show you how to use the gradebook to view and maintain data on your students as well as cover the different reports available through Teacher Access.

Goals:
- Maintain attendance records.
- Maintain gradesheet settings within a gradebook.
- Create and maintain assignments within one or more gradebooks, as well as online assignments.
- Score assignments utilizing all scoring functions.
- Navigate the gradebook and view student information.
- Transfer grades for new students in your class.
- Produce gradebook reports through Teacher Access.
- Enter grade overrides and percent adjustments, as well as report card comments.
- Enter grade change requests through Teacher Access.

Transportation

Course Overview: This course will walk you through how to create and maintain Transportation codes and records.

Goals:
- Use the transportation functionality.

Year End (Student Records)

Course Overview: The Skyward software keeps track of records in distinct school years, so rather than manually entering new codes and setting up configurations from scratch each year, there are clone processes that we recommend completing around the end of your school year to make your next-year setup quicker. In addition to cloning codes and configurations, you can also roll student fees and unapplied balances to the new year.

Goals:
- Process year end utilities.
- Process Fee Management year end utilities.
School Business Quick Start Courses

Accounts Payable Quick Start Course
Accounts Receivable Quick Start Course
Assets Quick Start Course
Bank Reconciliation Quick Start Course
Benefit Management Quick Start Course
Budgeting Quick Start Course
Data Mining (Business Systems) Quick Start Course
Employee Access Setup and Usage Quick Start Course
Fundamentals of Financial Management Quick Start Course
Fundamentals of Human Resources Quick Start Course
Knowledge Hub Setup and Maintenance
Online Forms Setup and Usage (Business Systems) Quick Start Course
Payroll Quick Start Course
Purchasing Quick Start Course
Reporting (Business Systems) Quick Start Course
Security (Business Systems) Quick Start Course
Staff Planning Quick Start Course
Substitute Tracking Quick Start Course
Time Off Quick Start Course
Time Tracking Quick Start Course
Warehouse Quick Start Course
Accounts Payable

Course Overview: This course contains all of the information you need to know about the Accounts Payable module. You will learn everything about entering invoices, to pulling those invoices into an accounts payable run to pay your vendors.

Goals:
- Create Invoice Groups and Invoices.
- Manage credit cards, credit card checkouts, and credit card groups.
- Configure the credit card transaction approval process.
- Understand the credit card transaction workflow.
- Create transactions manually, import transactions, and approve transactions.
- Generate invoices to pay credit card vendors.
- Manage expense reimbursement groups and expense reimbursement types.
- Configure the expense reimbursement approval process.
- Manually create and approve transactions.
- Generate invoices to pay the vendors.
- Process the invoice batch update and invoice reversals.
- Create and process an accounts payable run and print accounts payable checks.
- Create ACH files.
- Maintain Accounts Payable Runs.

Accounts Receivable

Course Overview: This course contains information about the Accounts Receivable module. You will learn about creating payors, entering invoices, and processing cash receipts for your received payments.

Goals:
- Complete Accounts Receivable setup.
- Create accounts receivable invoices.
- Process accounts receivable invoice updates.
- Enter and process cash receipts.
- Perform accounts receivable invoice maintenance.

Assets

Course Overview: This course contains information you need to know about the Asset module including how to create items and assets, as well as process addition, disposal, and depreciation records.

Goals:
- Complete Assets setup.
- Create item and asset records.
- Create and process addition, disposal, and depreciation records.
- Reset asset accounting updates.
Bank Reconciliation

Course Overview: In this session, you will learn the ins and outs of bank reconciliations, from creating a bank reconciliation, making manual changes, and finally to closing the bank reconciliation.

Goals:
- Create a bank reconciliation.
- Modify a bank reconciliation.
- Close a bank reconciliation.

Benefit Management

Course Overview: This course contains all of the information you need to know about the Benefit Management module. You will learn about everything from creating your plans and sub-plans to setting up your employee plans, as well as how to maintain the information.

Goals:
- Create plans, sub-plans, and employee plans.
- Update your employees’ coverage months.
- Create invoices to pay your insurance vendors.

Budgeting

Course Overview: This session contains information about entering and processing budget amounts, adopting the budget, and processing budget amendments.

Goals:
- Enter, process, and adopt budget amounts.
- Create and update budget amendments.

Data Mining (Business Systems)

Course Overview: This course will outline how to design and run reports based on data in specific areas of your system.

Goals:
- Create and run data mining reports.
- Utilize filters, sorts, and breaks for data mining reports.
Employee Access Setup and Usage

Course Overview: This course will walk you through configuring access to the Employee Access portal. You will determine what information displays on the portal, and how employees can view that information. Employees will be able to view payroll history as well as submit time off requests, enter time tracking status updates, and utilize the check estimator.

Goals:
- Configure security to allow the use of Employee Access.
- Utilize Employee Access utilities.
- Create default username structure.
- View payroll and demographic information.
- View time off balances and submit time off requests.
- Clock in and out and submit timesheets using Time Tracking.
- Utilize the check estimator.

Fundamentals of Financial Management

Course Overview: This course will teach you about the Vendor and Account areas of the software. You will learn about processing journal entries, processing cash receipt deposits, and looking up all information related to general ledger accounts and vendors.

Goals:
- Create and maintain addresses.
- Create and maintain vendors.
- Use the Vendor List and Vendor Profile.
- Maintain Account System and District Configurations.
- Create and maintain general ledger accounts, summary accounts, bank accounts, and account groups.
- Use the Account List and Account Profile.
- Create Projects and Grants.
- Create, clone, and update journal entries and cash receipts.
- Process the Create Closing Journal Entry utility.

Fundamentals of Human Resources

Course Overview: This course encompasses information from the Employee and Position modules. You will learn about everything from Employee and Position setup, to adding employees, positions, and assignments.

Goals:
- Create and maintain addresses and name codes.
- Add and delete an employee from the system.
- Maintain information within the Employee Profile.
- Create and maintain calendars.
- Create, maintain, and view salary calculation methods.
- Create and maintain matrices and Placement codes.
- Create positions and assignments and report on basic position and assignment information.
- Prepare assignments for payroll.
- Process position and assignment changes.
- Create and maintain organization charts.
Knowledge Hub Access Setup and Maintenance

**Course Overview:** You’ll learn all you need to know about creating Knowledge Hub users, roles, and course lists as well as linking them together to make managing your course enrollments a breeze.

**Goals:**
- Create Knowledge Hub roles, course lists, Skyward contacts, and users.
- Manage Knowledge Hub auto-enrollments.
- Generate PDC progress reports.
- Link Qmlativ security roles to Knowledge Hub roles.

Online Forms Setup and Usage (Business Systems)

**Course Overview:** The Online Form module allows you to create forms that employees may complete in Employee Access. You will also be able to process online form approvals once they’ve been submitted.

**Goals:**
- Create and maintain online forms and steps.
- Upload files into the Online Form Attachment area.
- Create and maintain online forms and steps for Employee Access.
- Approve, deny, and delete users’ online forms.

Payroll

**Course Overview:** This course will walk you through payroll and employee setup, running a payroll, and correcting payroll runs.

**Goals:**
- Implement ACH and check setup.
- Configure Payroll settings.
- Create and maintain Payroll, Deduction, and Benefit codes.
- Configure employees’ payroll information.
- Complete a payroll run.
- Process payroll run corrections.
- Process retro pay.
- Generate Payroll reports.

Purchasing

**Course Overview:** You will learn about everything from entering and approving purchase orders, to processing and printing those purchase orders.

**Goals:**
- Complete basic Purchasing setup.
- Create and approve purchase orders.
- Run purchase order updates.
- Print purchase orders.
- Maintain purchase orders.
Reporting (Business Systems)

Course Overview: Learn how you can design and run custom reports about any information in your database and how to assign who has access to those reports.

Goals:
- Create, clone, and run a report.
- Understand the Report Designer.
- Utilize formatting and properties.
- Add text to a report.
- Add and sort sections and lines on a report.
- Configure report filters and prompts.
- Configure report security.
- Utilize the Report Designer, Report, and My Report Queue areas.
- Import and export reports.

Security (Business Systems)

Course Overview: In this course, you will learn how to set up new users with appropriate access as well as other security configurations such as the days until user passwords expire.

Goals:
- Maintain security system configurations.
- Create security users, security groups, and roles.
- Set up screen security and maintain security roles.
- Set up and maintain security groups.
- Configure advanced functions on security groups.
- Run mass change processes to adjust security access for users.

Staff Planning

Course Overview: In this session, you will learn everything related to the setup of Staff Planning codes and configurations, position planning, and position budgeting.

Goals:
- Clone Human Resources codes.
- Create Staff Planning Plan codes.
- Configure staff planning groups.
- Import Position data.
- Maintain Staff Planning Groups.
- Configure Staff Planning Plan Employees.
- Configure position budgeting plan positions and plan pays.
- Utilize the position budgeting utilities.
- Add the staff planning budget into a new fiscal year in the Account module.
Substitute Tracking

Course Overview: During this course, you will be taught how to get up and running with the Substitute Tracking module, which includes items such as setup, as well as entering, importing, and calculating substitute transactions.

Goals:
- Complete Substitute Tracking setup.
- Create and import substitute transactions.
- Calculate substitute pay.

Time Off

Course Overview: In this course, you will learn about all aspects of time off processing: allocating time off balances, entering time off transactions, and approving time off requests.

Goals:
- Create and maintain time off types and reasons.
- Allocate time off balances to employees.
- Enter time off transactions for employees.
- Setup and maintain approvals for time off transactions.
- Approve and deny time off requests entered in Employee Access.

Time Tracking

Course Overview: You will learn about the entire cycle of tracking time: creating transactions, submitting timesheets, approving timesheets, and verifying that all necessary timesheets are submitted and accurate prior to starting payroll.

Goals:
- Configure employee and assignment time tracking setup.
- Create employee time tracking transactions.
- Submit timesheet weeks.
- Set up and maintain time tracking approvals.
- Approve and deny timesheets.
- Review and correct timesheets.

Warehouse

Course Overview: This course contains essential information you need to know about the Warehouse module. You will learn about purchasing items and processing warehouse requests, pick lists, stock transactions, and physical inventory.

Goals:
- Complete Warehouse setup.
- Purchase warehouse items.
- Process warehouse requests.
- Process stock transactions and physical inventory.
School Business General and Mastery Courses

Accounts Payable Mastery Course
Accounts Receivable Mastery Course
Assets Mastery Course
Bank Reconciliation Mastery Course
Benefit Management Mastery Course
Budgeting Mastery Course
Customization (Business Systems) General Course
Data Mining (Business Systems) General Course
Employee Access Setup for Employees Specialty Course
Employee Access Setup and Usage Mastery Course
Fundamentals of Financial Management Mastery Course
Fundamentals of Human Resources Mastery Course
General Navigation (Business Systems) General Course
Online Forms Setup and Usage (Business Systems) Mastery Course
Payroll Mastery Course
Purchasing Mastery Course
Reporting (Business Systems) Mastery Course
Security (Business Systems) Mastery Course
Staff Planning Mastery Course
Substitute Tracking Mastery Course
System Administration (Business Systems) General Course
Time Off Mastery Course
Time Tracking Mastery Course
Warehouse Mastery Course
Year End - Financial Management
Year End - Human Resources
Accounts Payable

Course Overview: In this course, you will learn about everything from Accounts Payable setup, to entering and approving invoices, to pulling those invoices into an accounts payable run to pay your vendors.

Goals:
- Complete Accounts Payable setup.
- Create and approve invoices.
- Manage credit cards, credit card checkouts, and credit card groups.
- Configure the credit card transaction approval process.
- Understand the credit card transaction workflow.
- Create transactions manually, import transactions, and approve transactions.
- Generate invoices to pay credit card vendors.
- Manage expense reimbursement groups and expense reimbursement types.
- Configure the expense reimbursement approval process.
- Manually create and approve transactions.
- Generate invoices to pay vendors.
- Process the invoice batch update, invoice reversals, and account changes.
- Create and process an accounts payable run.
- Print accounts payable checks.
- Create ACH files.

Accounts Receivable

Course Overview: In this session, you will learn about Accounts Receivable setup, entering invoices, and processing cash receipts for the payments when you receive them.

Goals:
- Complete Accounts Receivable setup.
- Create Accounts Receivable invoices.
- Process Accounts Receivable invoice updates.
- Enter and process cash receipts.
- Perform Accounts Receivable invoice maintenance.

Assets

Course Overview: In this course, you will learn about everything related to asset configurations, creating items and assets, and processing addition, disposal, and depreciation records.

Goals:
- Complete Assets setup.
- Create item and asset records.
- Create and process addition, disposal, and depreciation records.
- Reset asset accounting updates.
Bank Reconciliation

**Course Overview:** This course will teach you the ins and outs of bank reconciliations, from creating a bank reconciliation, making manual changes, and finally to closing the bank reconciliation.

**Goals:**
- Create a bank reconciliation.
- Modify a bank reconciliation.
- Close a bank reconciliation.

Benefit Management

**Course Overview:** This course will cover everything from creating your plans and sub-plans to setting up your employee plans, as well as how to maintain the information.

**Goals:**
- Create plans, sub-plans, and employee plans.
- Update your employees’ coverage months.
- Create invoices to pay your insurance vendors.

Budgeting

**Course Overview:** Gain knowledge about setup, entering and processing budget amounts, adopting the budget, and processing budget amendments.

**Goals:**
- Complete budget version setup and maintenance.
- Enter, process, and adopt budget amounts.
- Complete setup for budget amendments.
- Create, approve, and update budget amendments.

Customization (Business Systems)

**Course Overview:** This course covers customizing menus, views, and filters, and how to create custom modules and screens.

**Goals:**
- Understand database structure basics.
- Configure navigation and profile menus.
- Configure district-wide views and filters.
- Create custom codes and screens, and maintain custom screens.
- Maintain customization security settings.

Data Mining (Business Systems)

**Course Overview:** This course will teach you how to design and run reports based on data in specific areas of your system.

**Goals:**
- Create and run data mining reports.
- Create and utilize filters, sorts, and breaks for data mining reports.
Employee Access for Employees

**Course Overview:** This course will walk you through the Employee Access portal. You will be able to view payroll history as well as submit time off requests, enter time tracking status updates, and utilize the check estimator.

**Goals:**
- View and update payroll and demographic information.
- View time off balances and submit time off requests.
- Clock in and out and submit timesheets using Time Tracking.
- Utilize the check estimator.

Employee Access Setup and Usage

**Course Overview:** This course will walk you through configuring access to the Employee Access portal. You will determine what information displays on the portal and how employees can view that information. Employees will be able to view payroll history as well as submit time off requests, enter time tracking status updates, and utilize the check estimator.

**Goals:**
- Configure security to allow the use of Employee Access.
- Utilize Employee Access utilities and the check estimator.
- Create default user name structure.
- View payroll and demographic information.
- View time off balances and submit time off requests.
- Clock in and out and submit timesheets using Time Tracking.

Fundamentals of Financial Management

**Course Overview:** In this course, you will learn about the Vendor and Account areas of the software. In addition to the setup necessary to make these areas function, you will learn about processing journal entries, processing cash receipt deposits, and looking up all information related to general ledger accounts and vendors.

**Goals:**
- Create and maintain name codes, addresses, and codes related to contact information.
- Create and maintain Vendor codes and vendors.
- Utilize the Vendor List and Vendor Profile areas.
- Maintain Account System and District Configurations.
- Create and maintain general ledger accounts, summary accounts, bank accounts, and account groups.
- Utilize the Account List and Account Profile.
- Create Projects and Grants.
- Create and maintain cash receipt and journal entry groups.
- Create, clone, and update journal entries.
- Create and update cash receipts and cash receipts from Accounts Receivable.
- Process account utilities and generate account reports.
Fundamentals of Human Resources

Course Overview: This course encompasses information from the Employee and Position modules. You will learn about everything from Employee and Position setup, to adding employees, positions, and assignments.

Goals:
- Create and maintain addresses, name codes, account settings, and general ledger accounts.
- Add and delete an employee from the system.
- Maintain information within the Employee Profile.
- Create and maintain calendars, Position codes, positions, and assignments.
- Create and maintain matrices and Placement codes.
- Create, maintain, and view salary calculation methods.
- Prepare assignments for payroll.
- Process position and assignment changes.
- Create and maintain organization charts.

General Navigation (Business Systems)

Course Overview: Want to learn how to navigate and utilize the system to its fullest? Then this course will help you accomplish that.

Goals:
- Manage the options on the Home screen.
- Use Columns and Filters.
- Inquire on Vendor information.

Online Forms Setup and Usage (Business Systems)

Course Overview: The Online Form module allows you to create forms that employees may complete in Employee Access. You will also be able to process online form approvals once they’ve been submitted.

Goals:
- Create and maintain online forms and steps.
- Upload files into the Online Form Attachment area.
- Create and maintain online forms and steps for Employee Access.
- Approve, deny, and delete users’ online forms.
- Mass print online forms.
Payroll

Course Overview: In this course, you will learn about everything within the Payroll area. This includes information about payroll and employee setup, running a payroll, processing utilities, and running reports.

Goals:
- Implement ACH and check setup.
- Configure Payroll settings.
- Create and maintain Payroll codes.
- Create and maintain Deduction and Benefit codes.
- Configure employees’ payroll information.
- View employee check history.
- Complete a payroll run.
- Process payroll run corrections, retro pay, and payroll audits.
- Generate Payroll reports.

Purchasing

Course Overview: You will learn everything from the Purchasing setup, to entering and approving purchase orders, to processing those purchase orders and running reports.

Goals:
- Complete Purchasing setup.
- Create standard and online e-commerce purchase orders.
- Approve purchase orders.
- Run purchase order updates.
- View purchase orders and print purchase order reports.
- Complete e-commerce ordering.
- Create purchase order receiving records.

Reporting (Business Systems)

Course Overview: Learn how you can design and run custom reports about any information in your database and how to assign who has access to those reports.

Goals:
- Create, clone, and run a report.
- Understand the Report Designer.
- Utilize formatting and properties.
- Add text and images to a report.
- Create calculated fields and aggregate math fields.
- Add and sort sections and lines on a report.
- Configure report filters, prompts, variables, parameters, and styles.
- Configure report security.
- Utilize the Report Designer, Report, and My Report Queue areas.
- Import, export, and replace reports.
- Configure scheduled report runs.
- Create and maintain prompt templates.
Security (Business Systems)

**Course Overview:** In this course, you will learn about security configurations such as timeout settings, monitoring system changes that affect security, and how to set up new users of the system with appropriate access.

**Goals:**
- Maintain security system configurations.
- Configure alternate authentication options.
- Create security users, security roles, and security groups.
- Set up screen security and maintain security roles.
- Set up and maintain security groups.
- Configure advanced functions on security roles and security groups.
- Utilize the impersonation functionality.
- Process security setup verification reports.
- Run mass change processes to adjust security access for users.

Staff Planning

**Course Overview:** In this session, you will learn everything related to the setup of Staff Planning codes and configurations, position planning, and position budgeting.

**Goals:**
- Clone Human Resources codes.
- Create Staff Planning Plan codes.
- Configure staff planning groups.
- Maintain staff plans using the Plan List or Plan Profile.
- Configure staff planning plan positions and plan employees.
- Configure position budgeting plan positions and plan pays.
- Utilize the position budgeting utilities.
- Add the staff planning budget into a new fiscal year in the Account module.

Substitute Tracking

**Course Overview:** You will be taught everything from setup, to entering and importing substitute transactions, to processing substitute transactions and preparing them for payroll.

**Goals:**
- Complete Substitute Tracking setup.
- Create and import substitute transactions.
- Calculate substitute pay.
- Update substitute timesheets.
System Administration (Business Systems)

Course Overview: This course will teach you about miscellaneous system settings such as the time zone you are in, how to monitor system information such as emails that failed to send, how to update your software to the newest version, and advanced features such as mass changing values in the database.

Goals:
- Define the structure of your database with districts and fiscal years.
- Create buildings for use on employee positions.
- Understand the Name table.
- Configure auto-generated employee identification numbers and email addresses.
- Synchronize employee and vendor name numbers.
- Import profile photos.
- Configure system settings and codes.
- Understand the information contained in the System Profile.
- Resend emails from the email queue.
- Schedule processes to automatically run at regular intervals.
- Understand and process system utilities.
- Understand and utilize the Import Designer.

Time Off

Course Overview: Discover how categorizing the types of leave your organization grants enables you to allocate the appropriate time off types and amounts to employees. You will also find out how to create an automatic approval chain for time off requests.

Goals:
- Complete configuration for Time Off Transaction Settings, Time Off Types, and Type Off Reasons.
- Complete setup for Time Off Allocations and update employees’ assignments with Entitlement.
- Allocate Time Off to employees.
- Enter Time Off Transactions for employees in Employee Profile or in the Time Off Transactions area.
- Print the Time Off Transaction List report.
- Create an Organization Chart for Time Off and complete setup for Time Off Approvals.
- Approve and deny Time Off Requests entered in Employee Access.
- Print the Employee Time Off Balances report.

Time Tracking

Course Overview: You will discover that categorizing employees with shared characteristics allows you to specify how time is tracked for a particular group of employees and how they are compensated. You will also find out how to create an automatic approval chain for submitted timesheets.

Goals:
- Complete Time Tracking configurations.
- Create employee time tracking transactions.
- Process time tracking records in Employee Access.
- Submit timesheet weeks in Employee Access.
- Configure timesheet approvals.
- Approve and deny timesheets.
- Review time tracking timesheets.
Warehouse

Course Overview: This will teach you everything related to warehouse codes and configurations, creating and purchasing items, and processing warehouse requests, pick lists, stock transactions, and physical inventory.

Goals:
- Complete Warehouse setup.
- Purchase Warehouse items.
- Process Warehouse requests.
- Create pick lists.
- Process stock transactions and physical inventory.

Year End - Financial Management

Course Overview: This course will teach you about the utilities that can help you move encumbrances and open purchase orders to the next fiscal year, as well as close out the previous fiscal year.

Goals:
- Complete fiscal year end prep.
- Process Roll Year End Encumbrances, Expense Open Purchase Orders, and Close Fiscal Year.

Year End - Human Resources

Course Overview: A lot of your human resources data in the Skyward solution is stored by fiscal year so that you can keep it organized. This course will teach you how to wrap up your current year and prepare for human resources processing in the new year.

Goals:
- Know when to use the Locked by HR option.
- Run the HR year end clone processes.
- Update time off transactions to the new fiscal year.
- Process organization-specific utilities and a matrix-based step increase for multiple employees.
Federal Compliance Courses Available

941 Submission
1099M Reporting
Affordable Care Act Transmission (ACA)
Civil Rights Data Collection (CRDC)
CRDC
Equal Employment Opportunity Commission EEO-4 Submission
Equal Employment Opportunity Commission EEO-5 Submission
Governmental Accounting Standards Board (GASB)
Verification Collection Report
W2 Submission
Federal Compliance Courses

Course Overview: You will learn where all the data fields are found for each federal report, how to process each report, how to verify the data, and how to create the extract file needed for each report.

Goals:
- Pre-process data for Federal Reporting.
- Process Federal Reporting data for each report.
- Verify Federal Reporting data.
- Create files for Federal Reporting.
- Post-process data for Federal Reporting.
## State Compliance Courses Available - Illinois

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Course Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Financial Report Form (AFR 50-35)</td>
<td>Outside Course Assignment Submission</td>
</tr>
<tr>
<td>Annual Publication Submission</td>
<td>Prenatal Submission</td>
</tr>
<tr>
<td>Average Daily Attendance Totals</td>
<td>Prenatal XREF Submission</td>
</tr>
<tr>
<td>Birth to 3 Submission</td>
<td>Preschool Course Assignment Submission</td>
</tr>
<tr>
<td>Caregiver Demographic Submission</td>
<td>Regional Safe School Program (RSSP) Submission</td>
</tr>
<tr>
<td>Child Support</td>
<td>SAT Pre-ID Submission</td>
</tr>
<tr>
<td>College and Career Readiness Indicator Submission</td>
<td>School District Budget Form - 50-36</td>
</tr>
<tr>
<td>College Course Assignment Submission</td>
<td>Seal of Biliteracy</td>
</tr>
<tr>
<td>DLM-AA Pre-ID Submission</td>
<td>Service Provider Submission</td>
</tr>
<tr>
<td>Early Childhood Outcome Submission</td>
<td>Special Programs</td>
</tr>
<tr>
<td>EL Screener Submission</td>
<td>Student 504 Plan Submission</td>
</tr>
<tr>
<td>EIS - Employment File</td>
<td>Student Address Submission</td>
</tr>
<tr>
<td>EIS - End Employment File</td>
<td>Student Attendance Submission</td>
</tr>
<tr>
<td>EIS - Salary/Evaluation</td>
<td>Student Course Assignment Submission</td>
</tr>
<tr>
<td>English Learner Submission</td>
<td>Student Demographic Enrollment Submission</td>
</tr>
<tr>
<td>Every Student Succeeds Act (ESSA)</td>
<td>Student Discipline Group Submission</td>
</tr>
<tr>
<td>Exit Student Enrollment Submission</td>
<td>Teacher Course Assignment Entry Submission</td>
</tr>
<tr>
<td>Homeless Submission</td>
<td>Teacher Course Assignment Exit Submission</td>
</tr>
<tr>
<td>Immigrant Submission</td>
<td>Teachers Retirement System (TRS)</td>
</tr>
<tr>
<td>Joint Agreement Budget Form - 50-39</td>
<td>Unemployment Compensation Submission</td>
</tr>
<tr>
<td>Municipal Retirement Fund (IMRF)</td>
<td>WINS Submission</td>
</tr>
<tr>
<td>New Hire</td>
<td></td>
</tr>
</tbody>
</table>
STATE COMPLIANCE COURSES

Indiana

100R Submission
Additional Student Information Submission
Alternative Education Submission
Attendance Submission
Certified Position Submission
Course Completion Submission
Curricular Materials Assistance Submission
Discipline Submission
DOE-CE Submission
DOE-NE Submission
Dual Credit Submission
English Learner and Immigrant Submission
Educator Evaluation Submission
Graduate Report Submission
Homebound-Hospitalized Submission
INPRS Submission
INTERs Submission
IREAD-3 Submission
LEP Federal Flexibility Collection Submission
Membership Submission
New Hire Submission
Real Time Access Submission
Real Time Submission
School Personnel Number Export/Import
Special Education Evaluation Submission
Special Education Submission
Special Education Termination Submission
State Board of Accounts 8400 Report
Student Test Number Export
Test Accommodation Submission
Testing Online and Barcode Submission
Title 1 Submission
Unemployment Compensation

Minnesota

Budget Publication
Carl Perkins Submission
DIRS Submission
Early Childhood Family Education Submission
MARSS Submission Fall
MARSS Submission End of Year
MCCC Submission
New Hire
PERA
PERA Exclusion
Special Programs
Star Student Submission Fall
Star Student Submission Spring
TRA Submission
UFARS Preliminary
UFARS Final
Wage Detail Submission

Pennsylvania

AFR Submission - Expenditure
AFR Submission - Revenue
General Fund Budget Submission Preliminary
General Fund Budget Submission Final
New Hire
PIMS Collection 1
PIMS Collection 6
PIMS Internal Snapshot Collection 7
PIMS Submission 1
PIMS Submission 2
PIMS Submission 3
PIMS Submission 4
PIMS Submission 5
PIMS Submission 6
PSERS Work History Adjustment Submission
Retirement Contract Record Submission
Retirement Member Demographic Submission
Retirement PSERS Work Report Submission
Retirement VOYA Work Report Submission
Secure ID
Social Security Reimbursement
Special Programs
SupPer (Support Personnel) Submission
Unemployment Compensation
State Compliance Courses

Course Overview: You will learn where all the data fields are found for each state report, how to process each report, how to verify the data, and how to create the extract file needed for each report.

Goals:
- Pre-process data for State Reporting.
- Process State Reporting data for each report.
- Verify State Reporting data.
- Create files for State Reporting.
- Post-process data for State Reporting.