## **<u>PORT TOWNSEND SCHOOL DISTRICT</u> How to Run a Look-up Account Transactions in Skyward**

1) From "Home", select ("jump to") the System Financial Management

🖉 Web Financial Management - WF	- 10636 - 0	5 13 02 00 13-10.2 - Windows Internet Explor	'er	
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My Favorites		My Print Queue		Jump To Other Systems
Student Management		Job	Status	Educator Access Plus
Student Profile	<b>(</b>	No items available,		Employee Access
Student Browse	<b>1</b>			Einancial Management
Discipline By Officer	1			Student Management
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2) Click on the Menu Button Account Management, then under Account Master, select "Account Profile"

Web Financial Management - WF - 10636 - 05.13.02.0	0.13-10.2 - Windows Internet Explorer		-02
Home Account Account Account	L DISTRICT	Stephanie Stephens Account Preferences	Exit ?
Account Master - CA	Account Management Reporting - RP Budgetary Data Mining - DM	Project/Grant Management - PG     Reports - RE	1 (1)
Chart of #coounts - CA	Vendor Check History - VC		1

3) Click on the work "Account" to enter the account number that you want to look-up:

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🖉 Detail - WF\AM\CA\TB\AC	\DE - 29378 - 05.13.02	2.00.13-10.2 - Win	dows Internet	Explorer					ļ	- 🗆 🗵
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page	20 In Account:		Account Code	you want by	<u>-</u>			
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4) Click on the work "Account" to select account number that you want to look-up

5) Once you have selected an Account you can look up Budget, Activity, and Unused Balance

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Encumbrances	Fiscal Year 👻	C/N/P	Budget	Activity	Encumbered	Unused Amount	Pct Used
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AP Invoices	▶ 2012-2013	Curr	5,960.00	4,484.83	1,475.02	0.15	100.00
	▶ 2011-2012	Prev	8,395.00	6,442.93	0.00	1,952.07	76.75
	▶ 2010-2011	Prev	6,478.00	4,653.97	0.00	1,824.03	71.84
	▶ 2009-2010	Prev	7,736.00	4,368.49	0.00	3,367.51	56.47
	2008-2009	Prev	3,886.00	3,117.52	0.00	768.48	80.22
	▶ 2007-2008	Prev	3,432.00	3,077.20	0.00	354.80	89.66
	▶ 2006-2007	Prev	0.00	0.00	0.00	0.00	

6) Click on the arrow (black triangle) to expand

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SKYWARD <sup>.</sup>										· ·
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Encumbrances	Fiscal Year 👻	C/N/P		Budget	Activity	Encum	bered U	Inused Amount	Pct Used	
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	J	luly	0.15	0.00	0.15	0.00	0.00	0.00	0.	
	Ju	ine	0.15	0.00	0.15	0.00	0.00	0.00	0.	
	N	lay	1,475.17	-1,475.02	0.15	0.00	0.00	0.00	0.	
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7) Click on any BLUE month to expand to see transactions that were posted (again, click on arrow to expand)

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Expand All Colla	apse All M	odify Details (d	lisplaying	2 of 2) View Printable Deta	ails					
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Source: AP Post Date: 04/ Debit: 844 Credit: 0.0	, /08/2013 6.35 D0	Account: 10 Description: Si Updated: 0 By: Y	0 E 530 01 UMMARY 4/08/2013 'oung, Da	110 22 5015 202 0000 0000 7 TOTAL wn L.						
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8) Another useful Tab is "Detail Activity"; be sure to set the view to "Current Fiscal Year" (note: "Activity" are transactions that have occurred, such as Deposits, or Accounts Payable; to see Encumberance transactions, go to "Encumbrances" or "Purchase Orders"):

😨 WRDC Wise Desktop - Citrix	XenApp Plugins for Hosted Apps [SpeedScreen On]	Manual Review
🖉 Detail Activity - WF\AM\C/	\\TB\DA - 29384 - 05.13.02.00.13-10.2 - Windows Internet Explorer	
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Purchase Orders	U4/08/2013 AP U415GF SUMMARY TOTAL	846.35
AP Invoices		1,415.17
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	Detail Summary History Information	
	▼ Detail Transaction Records	
	PO Number Status Description	Vendor Key Arnou
	2401224009 History BH-Library books	FOLLETT 003 1,415
	▶ 02/26/2013 AP 0228GF SUMMARY TOTAL	171.06
	▶ 01/14/2013 AP 0115GF SUMMARY TOTAL	217.06
	▶ 12/11/2012 AP 1214GF SUMMARY TOTAL	108.11

9) Explore other Tabs to find the information you need.

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Note: you can also find much of the same information thru "Chart of Accounts"

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🖉 Web Financial Management - WF - 10636 - 05.13.02.00.1	3-10.2 - Windows Internet Explorer					
PORT TOWNSEND SCHOOL DISTRICT Stephanie Stepha						
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- Account Master - CA	- Account Management Reporting - RP	- Project/Grant Management - PG				
Account Profile - AP	Budgetary Data Mining - DM 1 Vendor Check History - VC 1	Reports - RE				