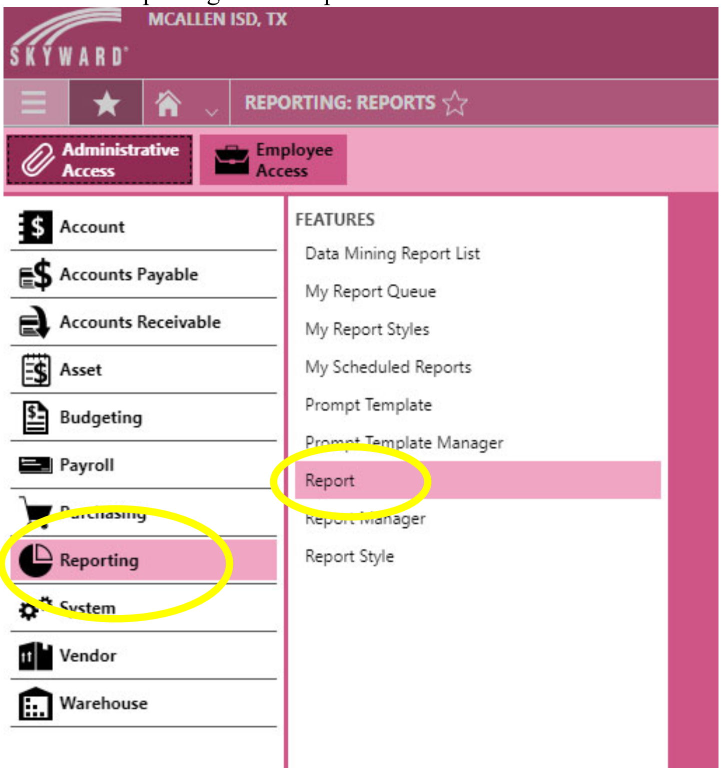
Section E- Financial Reports & Menus

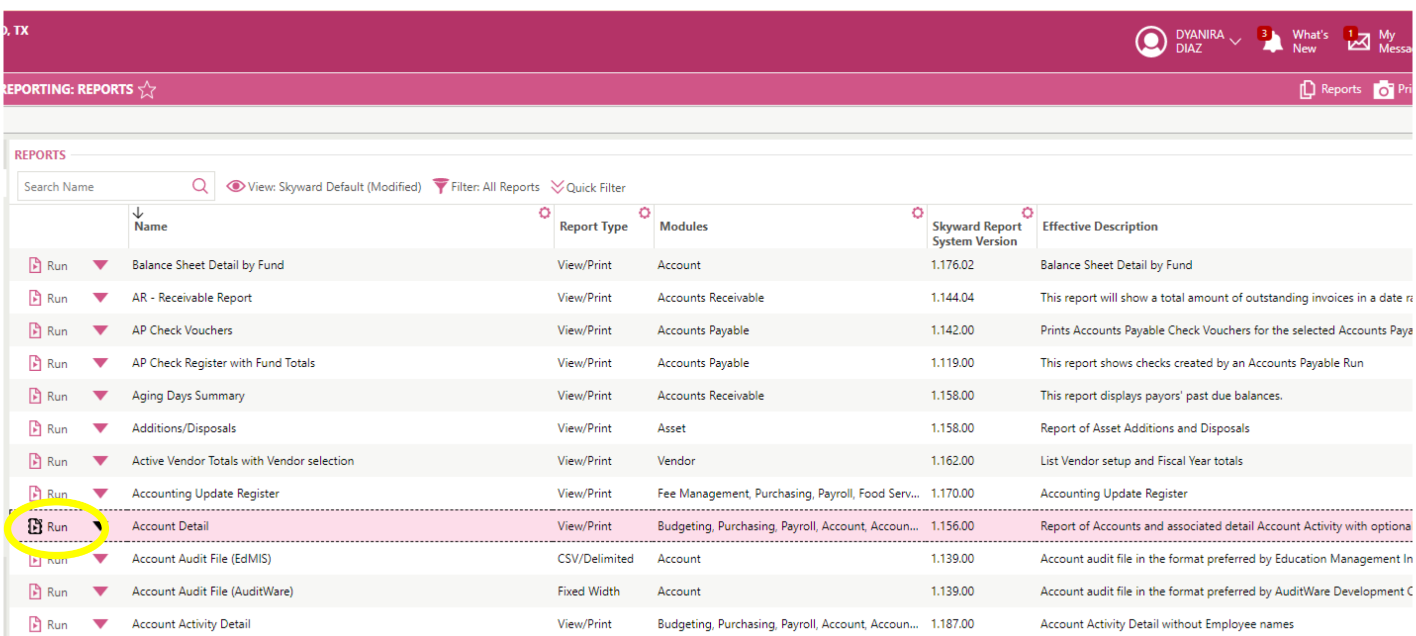
Account Detail Report

1. Once you are in Skyward, select the home button

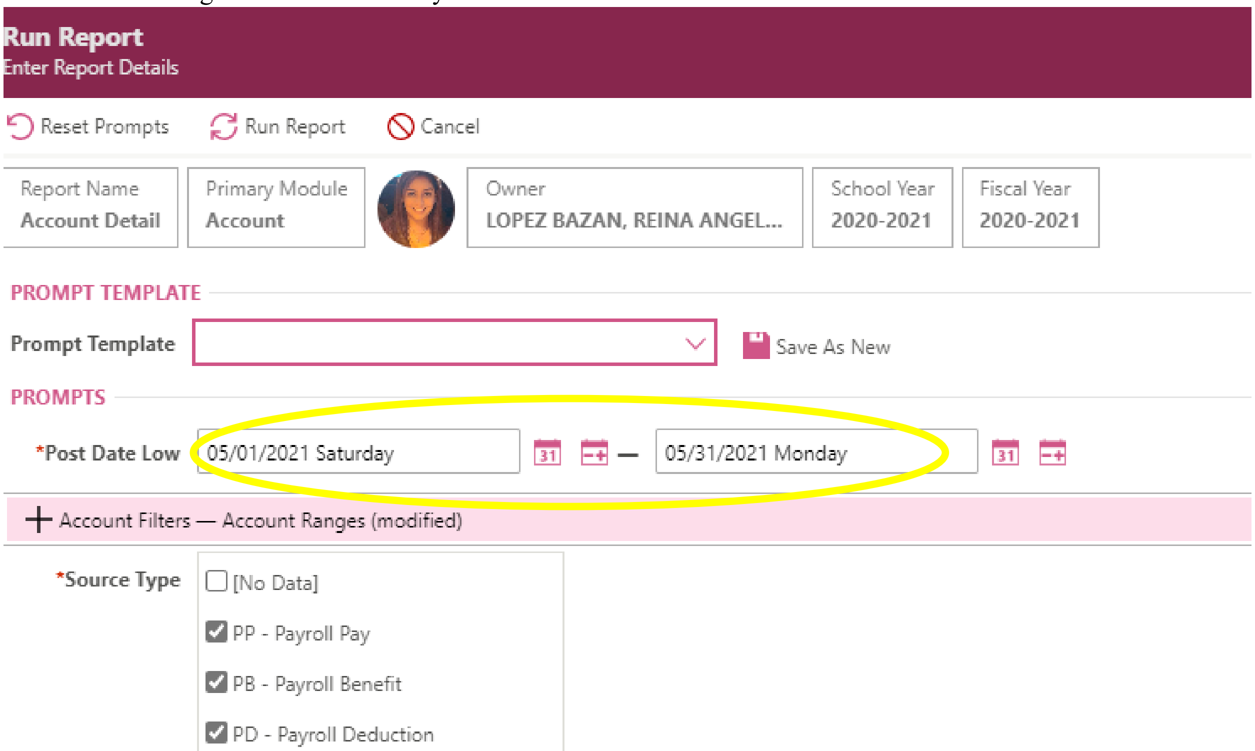
2. Click on "Reporting" then "report"



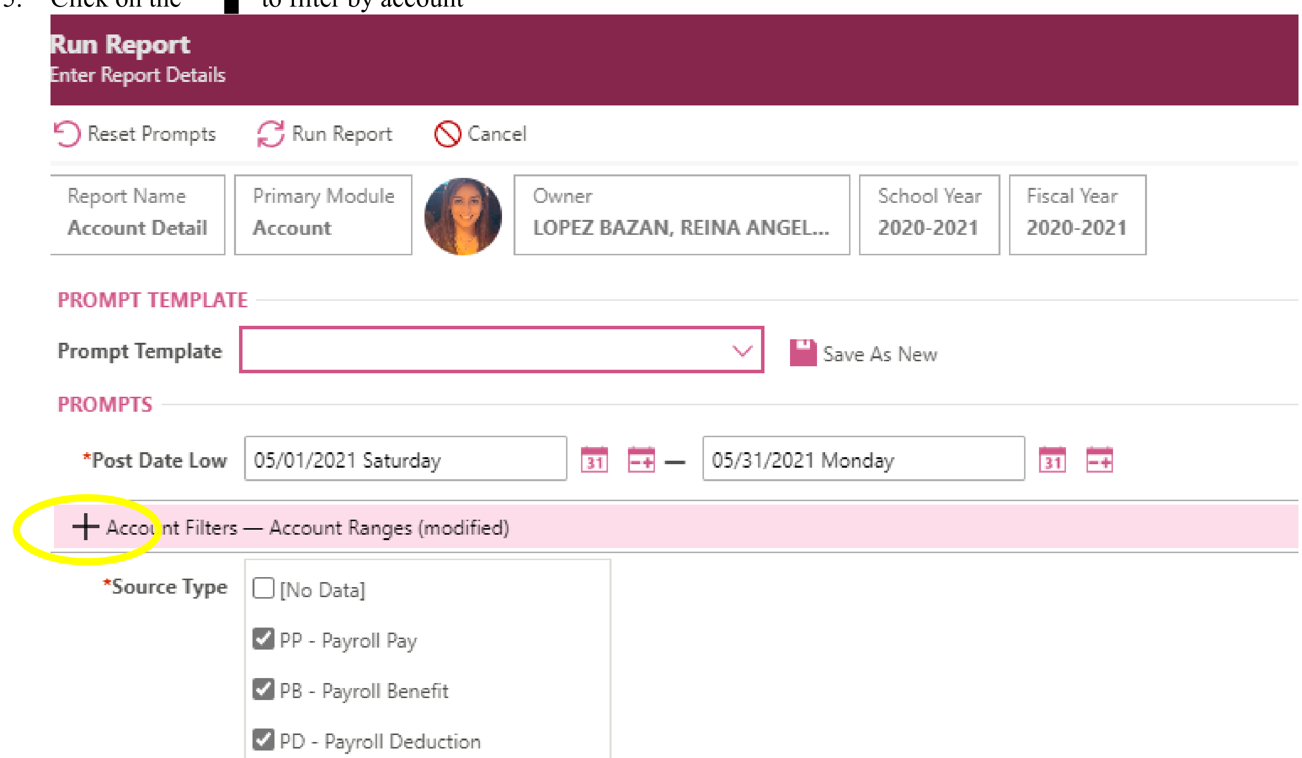
3. Find the report titled "Account Detail" and select "Run"



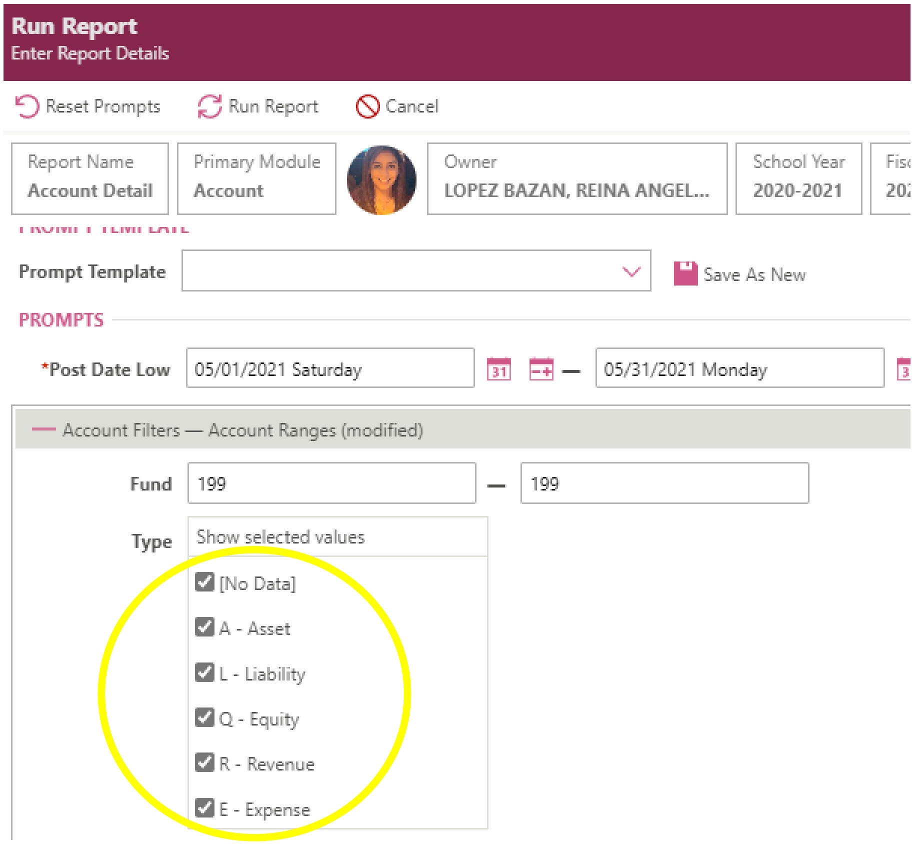
4. Select the date range of the information you want to view



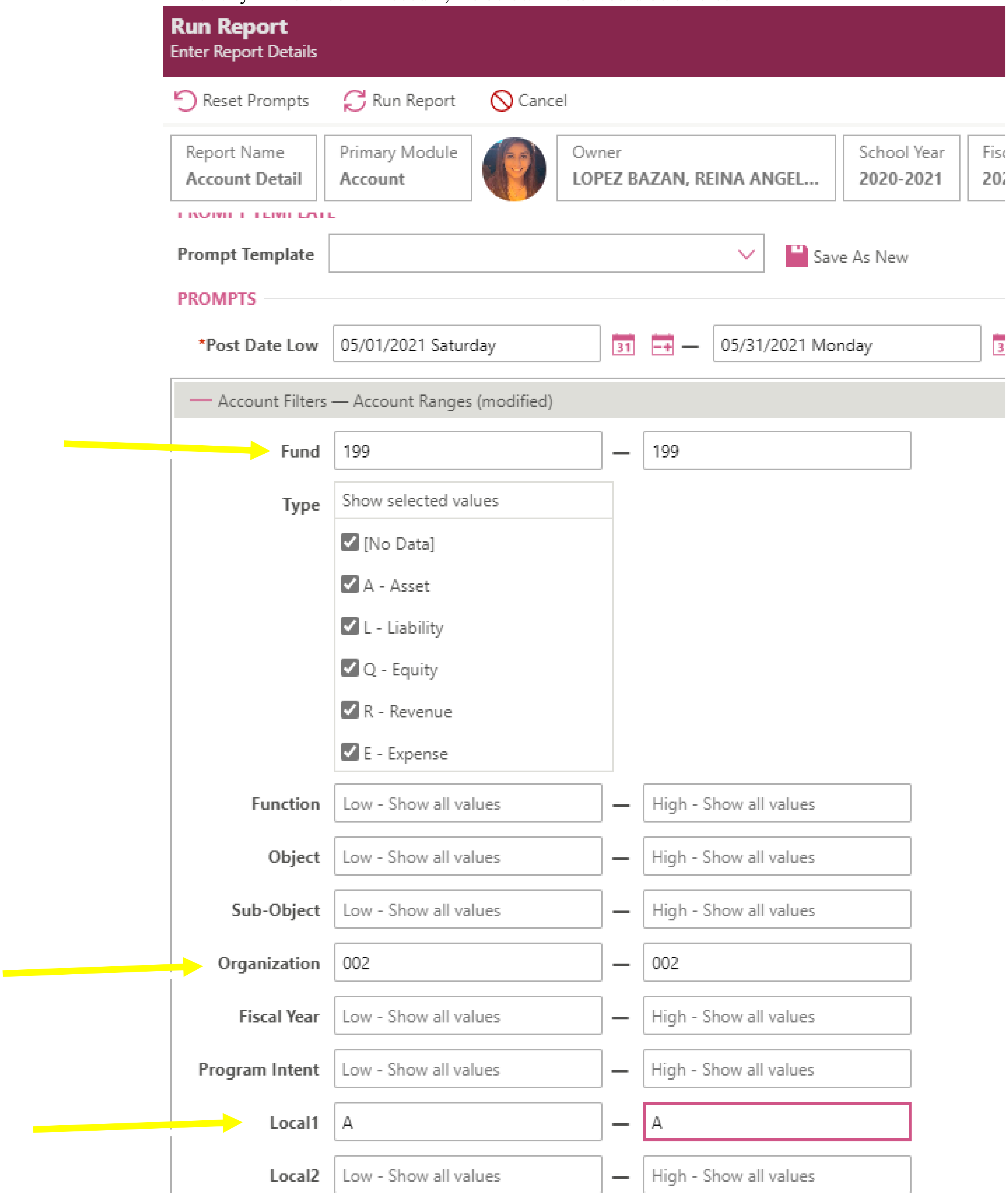
5. Click on the ✚ to filter by account



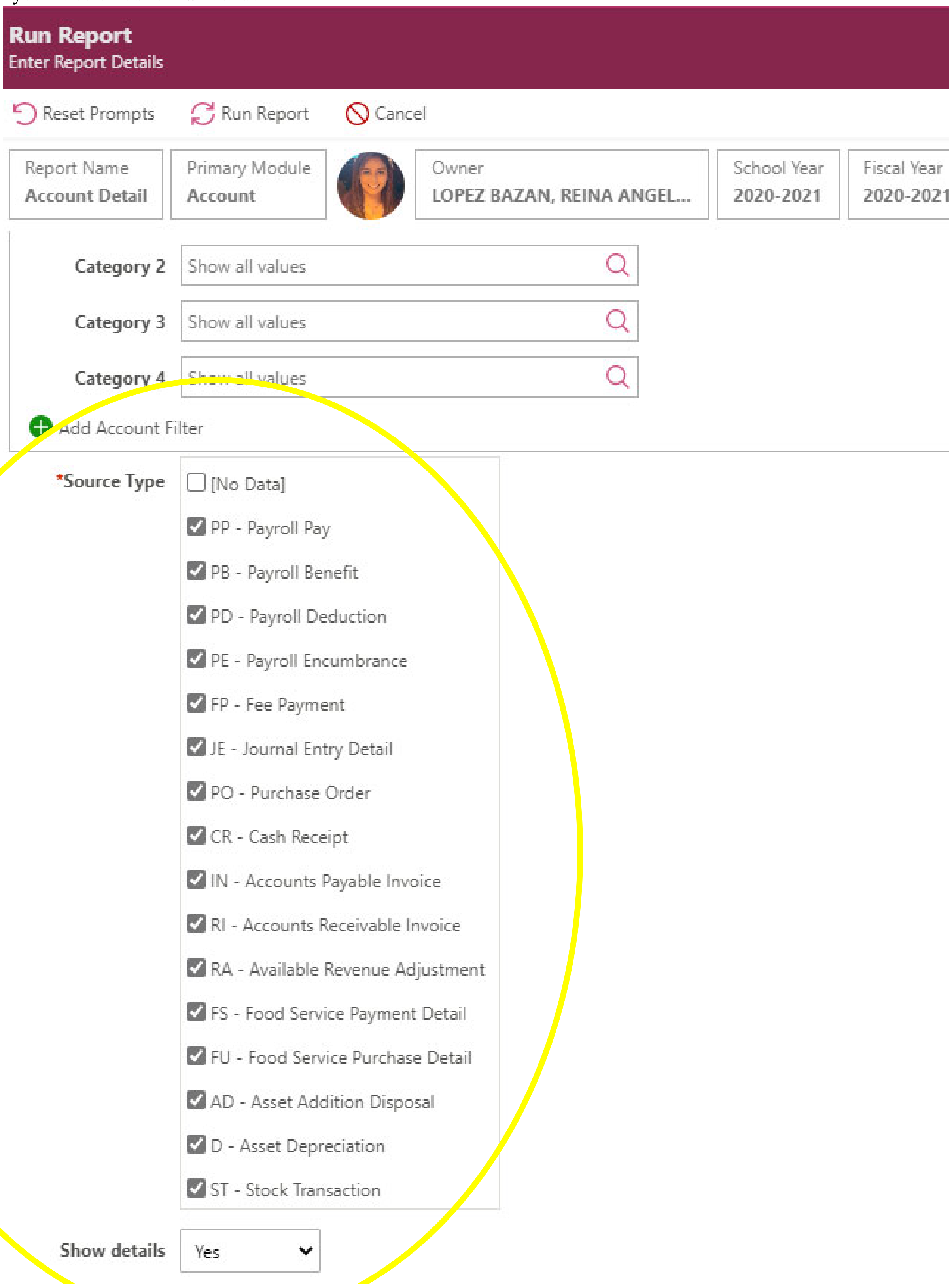
6. Make sure all boxes are checked under “Type”



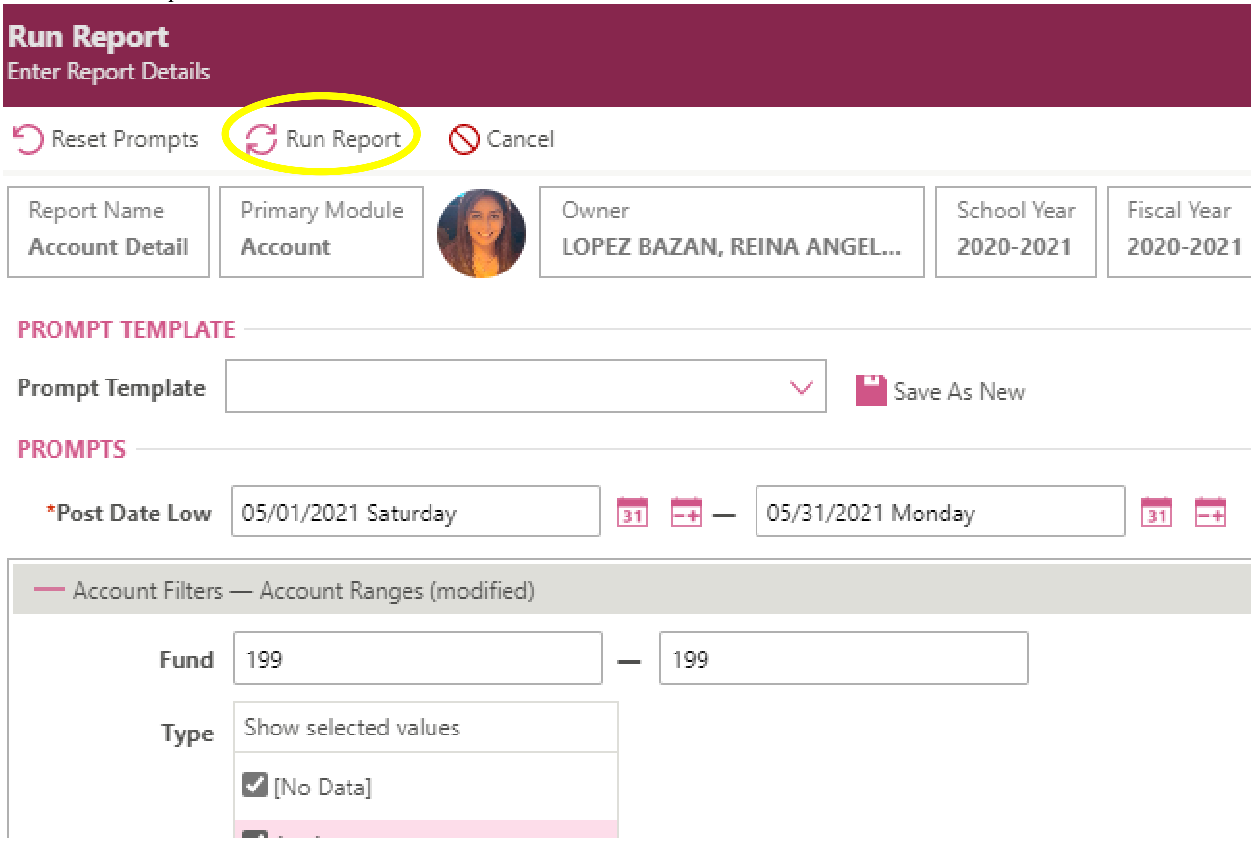
7. Enter the account number you want to see the detail activity for. For example, if Memorial wanted to view all activity in their 199-A account, the below filters would be entered



8. Make sure all boxes under “Source Type” are checked off so that all activity appears on the report and that “yes” is selected for “Show details”

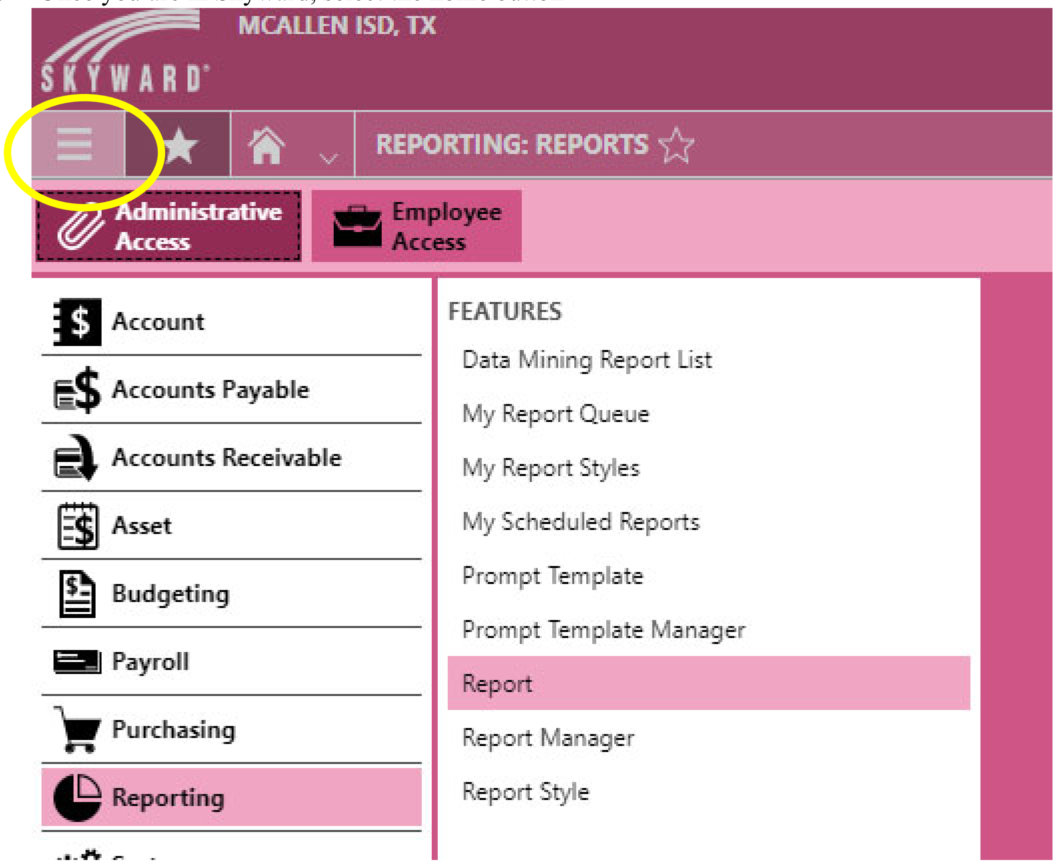


9. Select “Run Report”

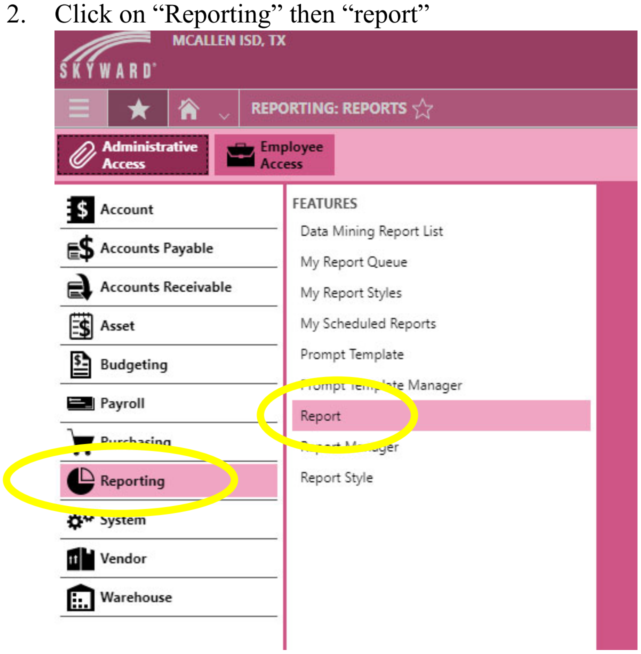


Encumbered Accounts Report

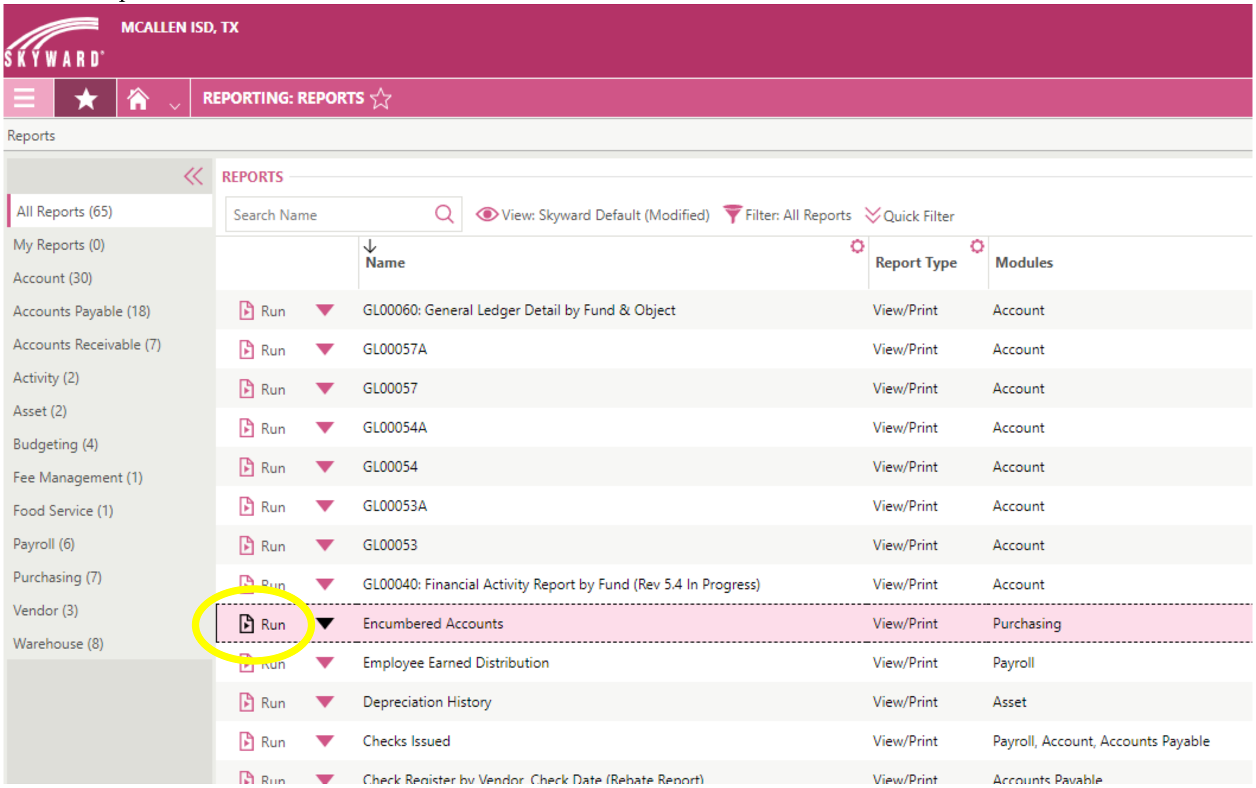
1. Once you are in Skyward, select the home button



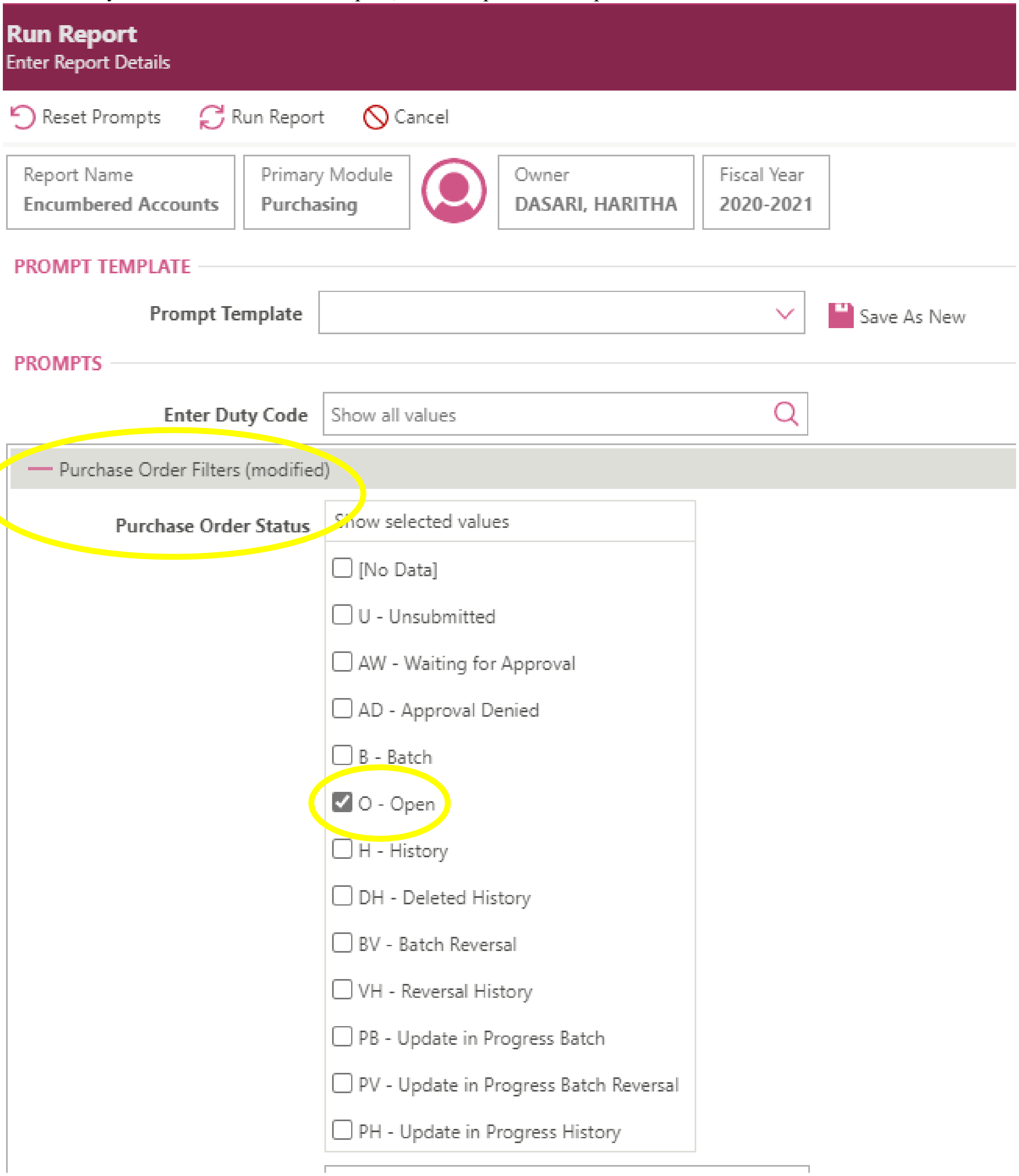
2. Click on "Reporting" then "report"



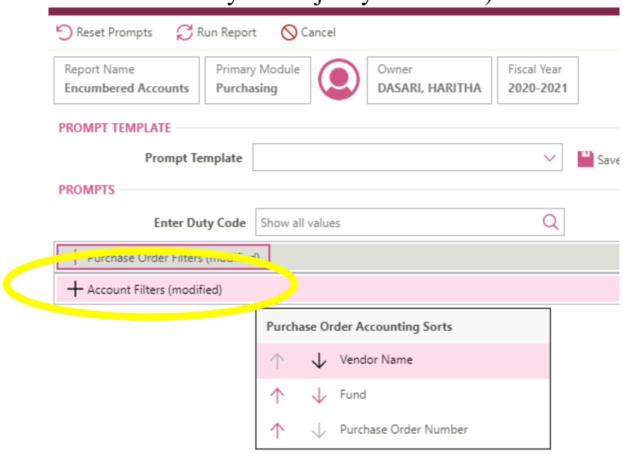
3. Find the report titled “Encumbered Accounts” and select “Run”

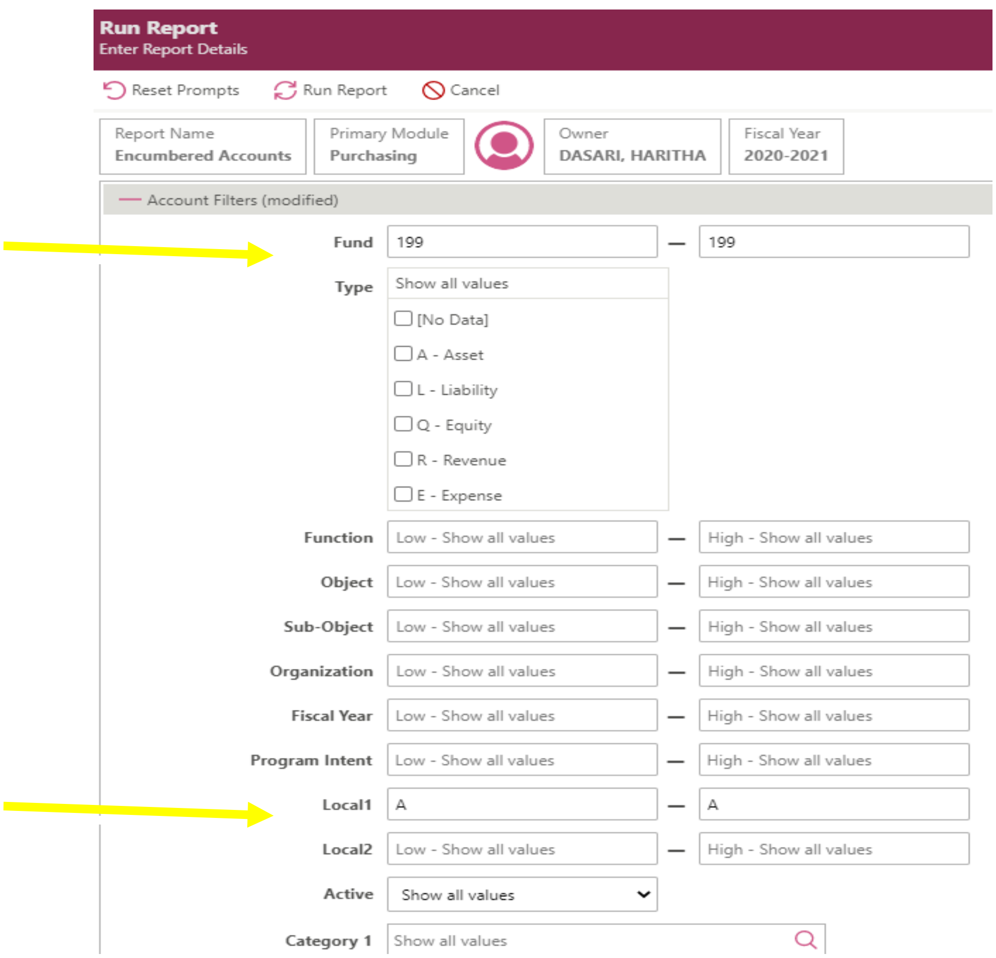


4. To view all your PO's that haven't been paid, select "Open" under "purchase order status"

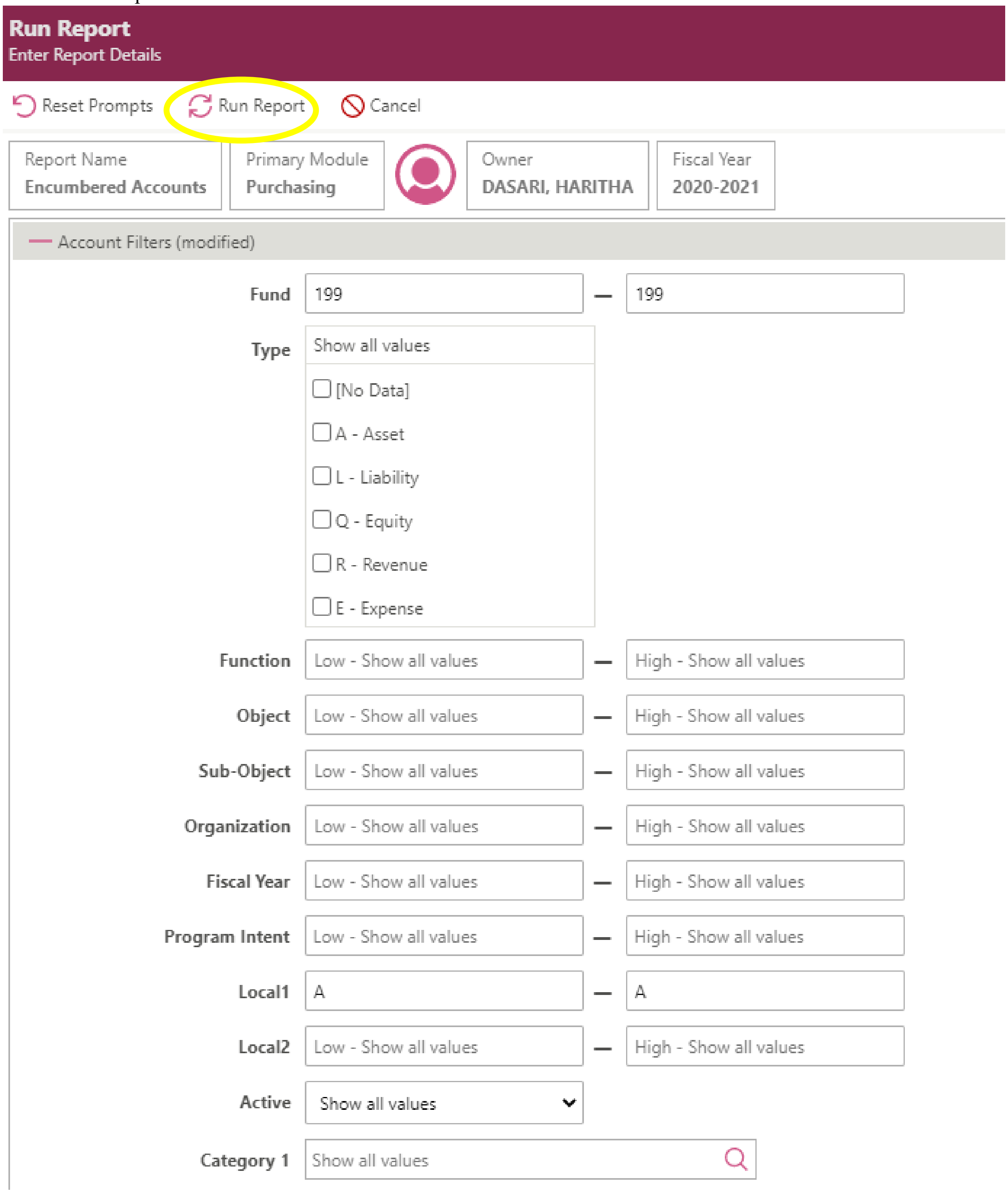


5. If you wanted to narrow down your selection to a specific fund, sub object, org, etc., then you could click on the next to "account filters" and enter the account you want to view. If you leave it blank, the report will bring up all PO's you have access to (if any PO's that aren't yours are appearing on the report, please contact IT so they can adjust your access).





6. Select "Run Report"



Run Report
Enter Report Details

Reset Prompts | Run Report | Cancel

Report Name	Primary Module	Owner	Fiscal Year
Encumbered Accounts	Purchasing	DASARI, HARITHA	2020-2021

— Account Filters (modified)

Fund	199	—	199
Type	Show all values		
	☐ [No Data]		
	☐ A - Asset		
	☐ L - Liability		
	☐ Q - Equity		
	☐ R - Revenue		
	☐ E - Expense		
Function	Low - Show all values	—	High - Show all values
Object	Low - Show all values	—	High - Show all values
Sub-Object	Low - Show all values	—	High - Show all values
Organization	Low - Show all values	—	High - Show all values
Fiscal Year	Low - Show all values	—	High - Show all values
Program Intent	Low - Show all values	—	High - Show all values
Local1	A	—	A
Local2	Low - Show all values	—	High - Show all values
Active	Show all values		
Category 1	Show all values		