

## HOW TO LOOK UP A BUDGET CODE IN SKYWARD WEB MODULE OPERATING STATEMENT ACCOUNTS

The screenshot shows the Skyward Web Financial Management interface. The browser 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/wssu.dll/WSservice=wsFinySimhom01.w". The user is logged in as "Tammy Torres" with links for "Account", "Preferences", and "Exit".

The main navigation bar includes "Home", "Account Management", "Vendors", "Purchasing", and "Accounts Payable". The "Financial Management" section is highlighted.

The "Jump to Other Systems" sidebar on the right contains the following links:

- Employee Access
- Financial Management** (indicated by an orange arrow labeled "1.")
- Product Setup

The "Task Manager (17)" table shows the following data:

| 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 |

The "Available Funds" section shows the following data:

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

1.) FROM THE 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/WService=wsFin/sfnform01.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

2. Account Management Vendors Purchasing Accounts Payable

3. Account Master Setup

- Chart of Accounts
- Account Summary Templates
- Operating Statement Accounts
- Balance Sheet Accounts

Account Management Reporting

- Budgetary Data Mining

Project/Grant Management

- Reports

Budget Management Setup

- Budget Entry
- Requisitions
  - Budget Request
  - Budget Approval
- Transfers
  - Submit Transfers

Job Status

No items available.

Credit Card Transactions Awaiting My Approval

You do not have access to approve credit card transactions

Weather

Displaying weather for 75008 (change).  
Conditions for Longview, TX at 3:52 pm CDT  
Tuesday, August 06, 2013

Current Conditions:  
Partly Cloudy 90 F

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 |

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: \$13,416,608.08

2.) CLICK ON **ACCOUNT MANAGEMENT** TAB.

3.) CLICK ON **OPERATING STATEMENT ACCOUNTS**.

Operating Statement Accounts - WPJAM(CA)OS - 9307 - 05.13.06.00.05-10.2 - Windows Internet Explorer  
 https://skyweb.ptisd.org/scripts/wsa.dll/WService=wsFin/factbrows011.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Operating Statement Accounts

(Accounts are displayed based on your Account Clearance access.)

4. Fiscal Year: 2013-2014

Views: R FND T FC OBJ SO ORG F PI LOC (Restricted by Account Group) Filters: \*Skyward Default

| FND | T   | FC | OBJ | SO   | ORG | F   | PI | LOC | Account Number |                               |
|-----|-----|----|-----|------|-----|-----|----|-----|----------------|-------------------------------|
| 1   | 161 | R  | 00  | 5010 | 00  | 000 | 0  | 00  | 000            | 161 R 00 5010 00 000 0 00 000 |
| 2   | 161 | R  | 00  | 5020 | 00  | 000 | 0  | 00  | 000            | 161 R 00 5020 00 000 0 00 000 |
| 3   | 161 | R  | 00  | 5743 | 00  | 000 | 0  | 00  | 000            | 161 R 00 5743 00 000 0 00 000 |
| 4   | 161 | R  | 00  | 5744 | 00  | 000 | 0  | 00  | 000            | 161 R 00 5744 00 000 0 00 000 |
| 5   | 161 | R  | 00  | 5744 | 01  | 000 | 0  | 00  | 000            | 161 R 00 5744 01 000 0 00 000 |
| 6   | 161 | R  | 00  | 5744 | 02  | 000 | 0  | 00  | 000            | 161 R 00 5744 02 000 0 00 000 |
| 7   | 161 | R  | 00  | 5744 | 03  | 000 | 0  | 00  | 000            | 161 R 00 5744 03 000 0 00 000 |
| 8   | 161 | R  | 00  | 5744 | 04  | 000 | 0  | 00  | 000            | 161 R 00 5744 04 000 0 00 000 |
| 9   | 161 | R  | 00  | 5744 | 05  | 000 | 0  | 00  | 000            | 161 R 00 5744 05 000 0 00 000 |
| 10  | 161 | R  | 00  | 5744 | 06  | 000 | 0  | 00  | 000            | 161 R 00 5744 06 000 0 00 000 |
| 11  | 161 | R  | 00  | 5744 | 07  | 000 | 0  | 00  | 000            | 161 R 00 5744 07 000 0 00 000 |
| 12  | 161 | R  | 00  | 5744 | 08  | 000 | 0  | 00  | 000            | 161 R 00 5744 08 000 0 00 000 |
| 13  | 161 | R  | 00  | 5744 | 09  | 000 | 0  | 00  | 000            | 161 R 00 5744 09 000 0 00 000 |
| 14  | 161 | R  | 00  | 5744 | 10  | 000 | 0  | 00  | 000            | 161 R 00 5744 10 000 0 00 000 |
| 15  | 161 | R  | 00  | 5744 | 11  | 000 | 0  | 00  | 000            | 161 R 00 5744 11 000 0 00 000 |
| 16  | 161 | R  | 00  | 5744 | AT  | 000 | 0  | 00  | 000            | 161 R 00 5744 AT 000 0 00 000 |
| 17  | 161 | R  | 00  | 5744 | BG  | 000 | 0  | 00  | 000            | 161 R 00 5744 BG 000 0 00 000 |

200 200 records displayed

5. Account: Quick Key:

4.) MAKE SURE YOU ARE ON THE CORRECT YEAR.

5.) START TYPING IN YOUR ACCOUNT CODE IN THE **ACCOUNT** BOX.  
 THE MORE NUMBERS YOU PUT IN THE NARROWER THE SEARCH.

Operating Statement Accounts - WPJAM(CA)\OS - 9307 - 05.13.06.00.05-10.2 - Windows Internet Explorer  
 https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice-wsFin/facctbrws011.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Operating Statement Accounts (Accounts are displayed based on your Account Clearance access.)  
 Fiscal Year: 2013-2014

Views: R | FND | T | FC | OBJ | SO | ORG | F | PI | LOC (Restricted by Account Group) Filters: \*Skyward Default

| FND | T | FC | OBJ  | SO | ORG | F | PI | LOC | Account Number                |
|-----|---|----|------|----|-----|---|----|-----|-------------------------------|
| 161 | E | 36 | 6399 | 00 | 999 | 0 | 91 | 000 | 161 E 36 6399 00 999 0 91 000 |

Expand All Collapse All Modify Details (displaying 9 of 9) View Printable Details

- Monthly Account Activity
- Detail Account Activity View
- Account Encumbrance Activity
- Purchase Orders Using This Account
- Accounts Payable Invoices Using This Account
- Credit Card Transactions Using This Account
- Account Budget Activity
- Account Descriptions
- Account Information

4 161 E 36 6399 00 999 0 91 BUD 161 E 36 6399 00 999 0 91 BUD

200 200 records displayed Account: Quick Key:

6.) CLICK ON THE **EXPANDABLE ARROW** AT THE LEFT OF THE ACCOUNT CODE TO SEE ALL THE DETAILS PERTAINING TO THIS ACCOUNT SUCH AS MONTHLY ACTIVITY, DETAIL ACCOUNT ACTIVITY, PURCHASE ORDERS USING THIS ACCOUNT, ETC.

Operating Statement Accounts - WFVAM\CA\OS - 9307 - 05.13.06.00.05-10.2 - Windows Internet Explorer  
 https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsfin/facctbrws011.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

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 Fiscal Year: 2013-2014

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| FND | T | FC | OBJ  | SO | ORG | F | PI | LOC | Account Number                |
|-----|---|----|------|----|-----|---|----|-----|-------------------------------|
| 161 | E | 36 | 6399 | 00 | 999 | 0 | 91 | 000 | 161 E 36 6399 00 999 0 91 000 |

Expand All Collapse All Modify Details (displaying 9 of 9) View Printable Details

Monthly Account Activity  
 << 2013-2014 >>

|           | Debit<br>2013-2014 | Credit<br>2013-2014 | Net Activity<br>2013-2014 | Encumbered<br>2013-2014 |
|-----------|--------------------|---------------------|---------------------------|-------------------------|
| June      | 0.00               | 0.00                | 0.00                      | 0.00                    |
| May       | 0.00               | 0.00                | 0.00                      | 0.00                    |
| April     | 0.00               | 0.00                | 0.00                      | 0.00                    |
| March     | 0.00               | 0.00                | 0.00                      | 0.00                    |
| February  | 0.00               | 0.00                | 0.00                      | 0.00                    |
| January   | 0.00               | 0.00                | 0.00                      | 0.00                    |
| December  | 0.00               | 0.00                | 0.00                      | 0.00                    |
| November  | 0.00               | 0.00                | 0.00                      | 0.00                    |
| October   | 0.00               | 0.00                | 0.00                      | 0.00                    |
| September | 0.00               | 0.00                | 0.00                      | 0.00                    |
| August    | 0.00               | 179.94              | -179.94                   | 0.00                    |
| TOTAL     | 0.00               | 0.00                | 0.00                      | 0.00                    |

200 200 records displayed Account: ABC Quick Key:

7.)YOU MAY ALSO HIT **EXPAND ALL** (OR COLLAPSE ALL TO CLOSE) TO OPEN UP ALL FIELDS OR SIMPLY CLICK THE ARROW TO THE LEFT (8.) OF THE HEADING FOR THE SPECIFIED BOX ONLY.



Operating Statement Accounts - WF\AM\CA\OS - 9307 - 05.13.06.00.05-10.2 - Windows Internet Explorer  
 https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/facctbrws011.w

**PINE TREE INDEPENDENT SCHOOL DISTRICT**

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

**Operating Statement Accounts** (Accounts are displayed based on your Account Clearance access.)  
 Fiscal Year: 2013-2014

Views: R | FND | T | FC | OBJ | SO | ORG | F | PI | LOC (Restricted by Account Group) Filters: \*Skyward Default

FND T FC OBJ SO ORG F PI LOC Account Number

**Detail Account Activity** View

| Post Date | Source | SubSource | Batch    | Description              | Debit Amount | Credit Amount |
|-----------|--------|-----------|----------|--------------------------|--------------|---------------|
| 08/05/13  | AP     |           | SW15     | SUMMARY TOTAL            | 0.00         | 179.94        |
| 07/24/13  | TRAN   |           | 13-00016 | ATHLETIC OFFICE SUPPLIES | 0.00         | 200.00        |
| 07/18/13  | AP     |           | SD19     | SUMMARY TOTAL            | 179.94       | 0.00          |
| 07/01/13  | AP     |           | SW15     | SUMMARY TOTAL            | 179.94       | 0.00          |

**Account Encumbrance Activity**  
 There are no Detail Encumbrance records for this account.

**Purchase Orders Using This Account**  
 There are no Detail Purchase Order records for this account.

200 200 records displayed Account: Quick Key:

**HERE YOU SEE MORE EXAMPLES OF THE INFORMATION AVAILABLE WHEN HITTING THE EXPAND ARROW.**

**THIS CONCLUDES THE TUTORIAL ON HOW TO LOOK UP A BUDGET CODE IN SKYWARD WEB MODULE OPERATING STATEMENT ACCOUNTS.**