PORT TOWNSEND SCHOOL DISTRICT
How to Run a Look-up Account Transactions in Skyward

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

2) Click on the Menu Button [Account Management] then under Account Master, select “Account Profile”

3) Click on the work “Account” to enter the account number that you want to look-up:
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
6) Click on the arrow (black triangle) to expand

7) Click on any BLUE month to expand to see transactions that were posted (again, click on arrow to expand)
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”):

![Image of Detail Activity Tab]

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

===============================================================================

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

![Image of Chart of Accounts Tab]