

REGIONAL OFFICE OF EDUCATION

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Diane E. Wolf Assistant Superintendent

NAVIGATING YOUR WAY THROUGH Web Financial Management

Employees may view additional tabs based upon the rights given to that employee.

Chart of Accounts (Account Management)

The grant managers have the ability to see the current balance of their grants through the Chart of Accounts. Key areas to review to display most valuable results. All results ran in the chart of accounts can be dumped into excel by clicking the excel icon on the right side of the screen.

Fiscal Year: Current Budget Fiscal Year is selected

Account Sequence: The order of which you want the account displayed (Typically select Regular) Views: Operating Statement accounts (Revenue and Expense)

Filters: Can create a custom filter to narrow search to only preview one grant at a time.

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Expand and account to see detail. Each of the sub-areas can be expanded/collapsed individually or with the Expand all/Collapse All Links. You can view all transactions that have occurred from each of the individual accounts.

Chart of Accounts - WF\AM\CA\CA - 10732 - 05.14.10.00.03 - Google Chrome	
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Invoices Credit Card Transactions Using This Account	•
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If an attachment was made to your Purchase Order, this can also be viewed from this screen. Click to expand "purchase orders using this account" and click on the individual PO number. A screen will display called "View Purchasing Activity" and click on the "Attach" button. (** will appear when there is an attachment.)

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Budgetary Data Mining (Account Management)

A general ledger report can be created from Budgetary Data Mining. If one has not been created it can be cloned from another user. Simply change the Filter from "My Reports" to "All User's Reports". Select the report that you would like to Clone and hit the "Clone" Button on the right side of the screen. Click Print to run the report or excel to dump the report to excel.

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Cash Table-Distrib	Cash Table-Distrib	FOX Print
Cash Table-Oper	Cash Table-Oper	FOX Excel
Chart of Accounts	Chart of Accounts	FOX
Combined General Ledger	Combined General Ledger	FOX Schedule
Financial Statement	Financial Statement	FOX This Report
General Ledger	General Ledger	FOX
Liability Account Ledger	Liability Account Ledger	FOX

View my Purchase Orders (Purchasing)

This screen can be used to view or print your approved purchase orders.

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Purchasing Activity (Purchasing)

The current status of a Purchase Order can be viewed from the Purchasing Activity screen under the purchasing tab. *The description of the Status can be seen when hovering over the "Status" Title.* REQ-waiting higher approval, HIS-PO has been received and updated (payment issued).

f Purchasing Activity - WF\PU\VA\VA - 7795 - 05.14.10.00.03 - Google Chrome			
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PO Number Version Status Batch Number Description	Vendor Name		Notes
✓ 0021500157 KEQ 27 WATER SERVICE WASH CAN OF US ✓ 0021500136 HIS 17 PONTIAC PEST CONTROL	American Pest	-	**Attach
Line Items Accounts Approvals Receiving Records			
▼ Invoices Invoice Date Fiscal Year Invoice Number Net Amount Vendor Name Status Chu 10/22/2014 2014-2015 1089640 35.00 American Pest Control History 114		:heck Date <u>Cher</u> 0/22/2014	
Balance Notes Add Notes Change History View Change History			

Skyward Documentation

If at any time you are unsure of the process, instructions of the process can be found either on the ROE Staff portion of the website or by clicking the "?" located at the top right hand side of your screen.

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Skyward will recognize the path of which you are using to open up instructions specific to what you are trying to accomplish. *Note: that your path will be displayed at the top of your screen on all screens.*

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