


Pflugerville Independent School District – Finance User Guide

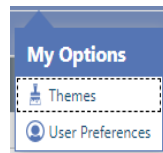
General Information

System Tips

- To log into Skyward Finance System, you will need to ensure that you are on the Skyward Business system. The Finance system is different from the Student System. This will take you to your Finance Portal page.



- Clicking the  Menu icon (aka Hamburger) takes the user to application options.
- Click under your name on the right-hand side and you can change themes (color scheme) and user preferences.



- Your task list in the upper right-hand corner of your Finance Portal page shows items that are awaiting your attention.




- Clicking the Skyward icon or the Home icon navigates you to the Home screen.














- The Star icon adds or removes the screen you are viewing from your Favorites List. A Star icon that is filled-in indicates the screen is a favorite; not filled, the screen is not a favorite.



- Click the  icon in the upper left-hand corner of your screen by the url box to refresh the page without leaving the page.

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Common Icons

-  Chevron Left - Double left arrows expand the detail panel of a browse screen.
-  Chevron Right - Double right arrows collapse the detail panel of a browse screen.
-  Chevron Up - Double up arrows expand additional browses on a screen; located bottom right.
-  Chevron Down - Double down arrows collapse additional browses on a screen; located bottom right.
- Cog  - enables you to view the Column Options menu, where you can insert or delete a column or customize the display of the selected column. This icon displays in the column headers of list Screens throughout the application.
-  Collapse All - collapse all tab groups of a screen; Located at the top of the tab groups on a Profile Screen.
-  Column Sort Down - indicates that the column is sorted in descending order
-  Column Sort Up - indicates that the column is sorted in ascending order
-  Date - enables users to select a date when creating a date-sensitive record or running utilities/reports that require a date range\
-  Down Arrow - display throughout the application including to the right of the Home icon, district, and year selectors, and within fields containing an option to choose from a drop-down list. Also displays near the top right of list screens and when clicked, displays the “More Options” menu. Down Arrow icons enable users to select a portal, such as the Employee portal.
-  Drop-down - displays an Options menu for the record. For ex. - Delete, Submit, and Clone. Typically located to the right of the “Open” icon.