

Slide 1 - Slide 1

The screenshot shows the Skyward Financial Management web application interface. The browser title is "Web Financial Management - WF - 10636 - 05.12.06.00.09 - Windows Internet Explorer". The page header includes "Skyward School District 1" and a user profile for "Cat Smith". A navigation menu at the top lists various modules: Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, Bid Management, and Administration. The main content area is titled "Financial Management Setup" and is divided into three columns: "Account Management", "Budget Management", and "General Inputs". The "Account Management" column includes links for Project/Grant Management, Budgetary Data Mining, Reports, and Batch Re. The "Budget Management" column includes Budget Entry, Budget Revisions, and Adopt Budget. The "General Inputs" column includes Journal Entry and Cash Receipts. A yellow callout box is overlaid on the "Budgetary Data Mining" link, containing the following text:

**Budgetary Data Mining - Overview**

Click Financial Management, Account Management, Budgetary Data Mining.

**Who, What, When, Why?**

Budgetary Data Mining will allow you to create Revenue and Expense Summary, Revenue and Expense Detail, Balance Sheet Summary, and Balance Sheet Detail reports on the Web.

The same reporting principals apply in Web Data Mining as in PaC Account Management reporting.

At the bottom of the page, there is a footer with copyright information: "© 2012 Skyward, Inc. All rights reserved." and "Finance - Wisconsin - 05.12.06.00 - Posted". There are also view options for "Desktop View" and "Button Rows" and a note "Windows XP / Internet Explorer 8". The system tray at the bottom right shows "Local intranet" and a 100% zoom level.

Slide 2 - Slide 2

The Budgetary Data Mining browse displays.

Use the **Views** drop-down to select from:

- All Report Types
- Revenue and Expense Reports
- Balance Sheet
- Combined Balance Sheet and Operating Statement

Report Name	Access	Report Type	
Revenue and Expense Reports - Detail and Summary			
Balance Sheet - Detail and Summary			
Combined Balance Sheet and Operating Statement - Detail and Summary	M	Balance Sheet Detail	
asdf		Balance Sheet Summary	
Asset Accts Monthly Balance by Fund/F			
AUDITORS REV/EXP SUMMARY			
Balance Sheet - Statement of Position			
Balance Sheet Detail			
Balance Sheet Detail 11-12	SMITHCAT000	Balance Sheet Detail	
Balance Sheet Summary	SKYWARD	M	Balance Sheet Summary
Balance Sheet Summary 11-12	SMITHCAT000		Balance Sheet Summary
Balance Sheet Test	FUELLIDA000	R	Balance Sheet Summary
Bank Rec Report	WALDOKEN000	R	Balance Sheet Detail
BOARD EXPENSE HISTORY	SKYWARD	R	Revenue/Expense Summary
BOARD EXPENSE HISTORY2	AVILEANG000	R	Revenue/Expense Summary
BOARD EXPENSE HISTORY2	ELSEYBIL000	R	Revenue/Expense Summary
BOARD EXPENSE HISTORY2	NAPOLZOI000	R	Revenue/Expense Summary
BOARD EXPENSE HISTORY2	SKYWARD	R	Revenue/Expense Summary
BOARD EXPENSE HISTORY2	ZAMOROPH000	R	Revenue/Expense Summary
BOARD EXPENSE HISTORY2- Test	ZAMOROPH000	R	Revenue/Expense Summary
BOARD REPORT	UHRICEDN000	R	Revenue/Expense Summary



Slide 4 - Slide 4

Clicking on the column heading will sort the list based on the column.

Use the Access column to determine what rights are set on the report.

- Blank = Owner Only
- M = Modify by all
- R = Read only by others

Report Name	Report Title	Created By*	Access	Report Type
3 digit function report	3 digit function report	STRAT2OE000	R	Revenue/Expense Summary
All Funds R/E comparison report	All Funds R/E comparison report	SKYWARD	M	Revenue/Expense Summary
ar detail			M	Balance Sheet Detail
ar detail - asset			M	Balance Sheet Detail
AR detail report			M	Revenue/Expense Detail
ar detail-skyacct -asset			M	Balance Sheet Detail
Balance Sheet - Statement of Position			M	Balance Sheet Summary
Balance Sheet Detail			M	Balance Sheet Detail
Balance Sheet Detail	Balance Sheet Detail 11-12	SMITHCAT000		Balance Sheet Detail
Balance Sheet Summary	Balance Sheet Summary	SKYWARD	M	Balance Sheet Summary
Balance Sheet Summary	Balance Sheet Summary 11-12	SMITHCAT000		Balance Sheet Summary
BOARD EXPENSE HISTORY	BOARD EXPENSE HISTORY	SKYWARD	R	Revenue/Expense Summary
BOARD EXPENSE HISTORY2	BOARD EXPENSE HISTORY	SKYWARD	R	Revenue/Expense Summary
BTOSA1	BTOSA1	SKYWARD	R	Revenue/Expense Summary
Budget Report	Budget Report	SKYWARD	M	Revenue/Expense Summary
Budget Summary Expense Report - Ob	Budget Summary Expense Report	SKYWARD	M	Revenue/Expense Summary
budget test report	budget test report	SKYWARD	R	Revenue/Expense Summary
Budget Variances 06-07 vs. 07-08	Budget Variances 06-07 vs. 07-08	SKYWARD	R	Revenue/Expense Summary
Combined Rev/Exp Detailed Report	Combined Rev/Exp Detailed Repor	SKYWARD	M	Revenue/Expense Detail
Combined Revenue/Expense Summary	Combined Revenue/Expense Sum	SKYWARD	M	Revenue/Expense Summary

50 records displayed

Report Name:

Slide 5 - Slide 5

**Expand a report name to review how the report is configured.**

Five nodes are available for **viewing** and **editing** the **configuration** of the report:

- **Report Parameters** - Holds basic setup information.
- **Breaks** - Defines the sort sequence of the accounts.
- **Account Ranges** - Defines the accounts on the report.
- **Field Selection** - The fields that are selected for the report.
- **Sources (Detail Reports)** - The accounting source of the report.

Report Name	Report Title	Created By*	Access	Report Type
Balance Sheet Detail	Balance Sheet Detail 11-12	SMITHCAI000		Balance Sheet Detail
Balance Sheet Summary	Balance Sheet Summary			
BOARD EXPENSE HISTORY	BOARD EXPENSE HISTORY			
BOARD EXPENSE HISTORY2	BOARD EXPENSE HISTORY2			
BTOSA1	BTOSA1	SKYWARD	R	Revenue/Expense Summary
Budget Report	Budget Report	SKYWARD	M	Revenue/Expense Summary
Budget Summary Expense Report - Ob	Budget Summary Expense Report	SKYWARD	M	Revenue/Expense Summary
budget test report	budget test report	SKYWARD	R	Revenue/Expense Summary
Budget Variances 06-07 vs. 07-08	Budget Variances 06-07 vs. 07-08	SKYWARD	R	Revenue/Expense Summary
Combined Rev/Exp Detailed Report	Combined Rev/Exp Detailed Report	SKYWARD	M	Revenue/Expense Detail
Combined Revenue/Expense Summary	Combined Revenue/Expense Summary	SKYWARD	M	Revenue/Expense Summary

Slide 6 - Slide 6

The screenshot shows the Skyward software interface for Skyward School District 1. The browser title is "Budgetary Data Mining - WFUAMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The user is logged in as "Cat Smith". The interface includes a navigation menu with options like Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, Bid Management, and Administration. A yellow callout box contains the text: "Click the Expand All link to view the specific information for each area. Security to the report will determine whether the user can View or Edit the report." The main content area shows a report titled "Balance Sheet Detail" with parameters such as "Notes: 2011-2012", "Consolidate Funds: No", "Budget Status: All accounts", "Print Details: Yes", "Detail Spacing: Single", "Print Totals: No", "Suppress Zero Amounts: No", "Accounts Excluded: None", "Report Access for Other Users: None", "Additional Printing Prompts: None", "Date Created: 07/27/2012", and "Created By: SMITH, CAT". Below the parameters are sections for "Breaks" and "Account Ranges". The "Breaks" section includes a table with columns: Description, Position, Break, Heading, Separator, and Dbl Underline. The "Account Ranges" section includes a table with columns: Ranges, Groups/Category, Low, and High. The interface also features a "Views" section, a "Filters" section, and a "Report Name" field. The bottom of the interface shows a status bar with "50 records displayed" and a "Report Name" field.

Slide 7 - Slide 7

The screenshot shows the Skyward Budgetary Data Mining application in a Windows Internet Explorer browser window. The browser title is "Budgetary Data Mining - WFLAMDMMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The application header includes the Skyward logo and "Skyward School District 1". A navigation menu contains: Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, Bid Management, and Administration. The main content area is titled "Budgetary Data Mining" and features a "Views" dropdown set to "All Report Types" and a "Filters" dropdown set to "\*\*My Reports". A table lists report entries:

Report Name	Report Title
▶ Balance Sheet Detail	Balance Sheet Detail 11-12
▶ Balance Sheet Summary	Balance Sheet Summary 11-12
▶ Fund 27 Combined Detail Report	Fund 27 Combined Detail Report
▶ Fund 27 Combined Summary Report	Fund 27 Combined Summary Report

To the right of the table is a vertical toolbar with buttons: Add, Edit, Delete, Clone, Print, Excel, and Schedule This Report. A yellow callout box is overlaid on the table, containing the text: "Security will determine which of the following maintenance options will display: Add, Edit, Delete, Clone, Print, Excel, Schedule This Report. The rest of this tutorial will show a glimpse of each option." At the bottom of the application, there is a status bar showing "50" in a dropdown, "4 records displayed", and a "Report Name:" field with "ABC" buttons. The browser status bar at the very bottom shows "Done" and "Local intranet".

Slide 8 - Slide 8

Budgetary Data Mining - WFLAMADMADM - 27021 - 05.12.06.00.09 - Windows Internet Explorer

Skyward School District 1

Cat Smith Account Preferences Exit ?

Budgetary Data Mining

Task Manager Favorites New Window My Print Queue

Report Information

\* Report Name:

\* Report Title:

ary

SMITHCAT000

The Add process will go through each of the configuration features where you will add the information according to your report needs.

Check Spelling

Save and Add Parameters

Back

Report Information

Parameters

Breaks

Account Ranges

Field Selection

Done Local intranet 100%

Slide 9 - Slide 9

The screenshot shows the Skyward Budgetary Data Mining application interface. The browser title bar reads "Budgetary Data Mining - WFVAMDMMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The page header includes the Skyward logo and "Skyward School District 1". A navigation menu on the left lists "Report Information", "Parameters", "Breaks", "Account Ranges", and "Field Selection". The main content area is titled "Budgetary Data Mining" and contains the following fields and options:

- Report Name: Fund 27 Combined Summary Report
- Report Title: Fund 27 Combined Summary Report
- Report Type: Combined B/
- Notes: Report contains totals thru month selected
- \* Consolidate Funds:  Yes  No
- \* Budget Status: All Accounts
- \* Print Detail:  Yes  No
- \* Detail Spacing: Single
- \* Print Totals:  Yes  No
- \* Suppress Zero Amounts:  Yes  No
- Account exclusions:  Exclude accounts that have no beginning balance and no FY activity (B/S Only)

Additional options include "Report access for other users" (No access, Read only, Modify) and "Add'l printing prompt for current user" (Open Account Range Filter screen). A callout box with a yellow background states: "The Edit option allows you to modify the information." Buttons for "Check Spelling", "Save and Back", and "Back" are also visible.

Slide 10 - Slide 10

The screenshot shows the Skyward Budgetary Data Mining application interface. At the top, the browser title is "Budgetary Data Mining - WFVAMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The application header includes the Skyward logo and "Skyward School District 1". A navigation menu contains various options: Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, Bid Management, and Administration. The main content area is titled "Budgetary Data Mining" and features a table of reports. The table has columns for Report Name, Report Title, Created By, Access, and Report Type. The following table represents the data shown in the screenshot:

Report Name	Report Title	Created By	Access	Report Type
▶ Balance Sheet Detail	Balance Sheet Detail 11-12	SMITHCAT000		Balance Sheet Detail
▶ Balance Sheet Summary	Balance Sheet Summary 11-12			
▶ Fund 27 Combined Detail Report	Fund 27 Combined Detail Report			
▶ Fund 27 Combined Summary Report	Fund 27 Combined Summary Report			

Overlaid on the table is a yellow callout box with the text: "Delete will remove the report from the system." Below the table, a "Confirm Delete" dialog box is open, asking: "Are you sure you wish to delete this record (Fund 27 Combined Summary Report)?" with "Yes" and "No" buttons. To the right of the table, a vertical toolbar contains buttons for Add, Edit, Delete, Clone, Print, Excel, and Schedule This Report. At the bottom of the interface, a status bar shows "50" in a dropdown, "4 records displayed", and a "Report Name:" field. The browser's taskbar at the bottom indicates "Local intranet" and "100%" zoom.

Slide 11 - Slide 11

The screenshot shows the Skyward School District 1 web application interface. The browser title bar reads "Budgetary Data Mining - WF\AM\MDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The application header includes the Skyward logo and the text "Skyward School District 1". A navigation menu contains items like Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, Bid Management, and Administration. The main content area is titled "Budgetary Data Mining" and features a left-hand sidebar with options: Report Information, Parameters, Breaks, Account Ranges, and Field Selection. The "Report Information" section contains several form fields: "\* Report Name: Balance Sheet Summary", "\* Report Title: Balance Sheet Summary 11-12", "\* Report Type: Balance Sheet Summary", and "\* Add Report For: SMITH CAT". A note below these fields states "Asterisk (\*) denotes a required field". On the right side, there are buttons for "Create Clone", "Check Spelling", and "Back". A tooltip above the "Create Clone" button says "Creates a clone of the selected record and opens the Parameter screen for viewing/editing." A yellow callout box points to the "Create Clone" button with the text: "Clone will create a copy of the report and you will be prompted to view/edit the information." The bottom status bar shows "Local intranet" and "100%" zoom level. A JavaScript snippet is visible at the bottom left: "javascript:if (cbs("b5ave1")) {checkSave("CloneReport","famdhttp000.w", "DoNothing");}"

Slide 12 - Slide 12

The screenshot displays a web browser window titled "Budgetary Data Mining - WFLAMMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The main application is "Skyward School District 1". A "Runtime Parameters" dialog box is open, showing the following fields and options:

- Runtime Report Parameters:**
  - Report Name: Fund 27 Combined Summary Report
  - Reporting Month: Prior Month
  - Select Month: June
  - Year: 2012
  - Print Title Page
  - Print Greenbar
- Runtime Report Setup:**
  - How do you want to change runtime setup?
    - Use current setup - no change
    - Change setup for this run only - do not save
    - Change setup for this run and save setup
  - Report Name: Fund 27 Combined Summary Report

A yellow callout box with the text "Print allows you to set the parameters and print the report." is positioned over the "Print" button in the "Runtime Report Parameters" section. The background application shows a sidebar with "Budgetary Data" and a list of reports including "Fund 27 Combined Summary". The browser's status bar at the bottom indicates "Local intranet" and "100%".

Slide 13 - Slide 13

The screenshot displays a web browser window titled "Budgetary Data Mining - WFLAMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The application interface includes a top navigation bar with "Home" and "Account Management" tabs, and a sidebar menu under "Budgetary Data" with options like "Balance Sheet Detail", "Balance Sheet Summary", "Fund 27 Combined Detail Rep", and "Fund 27 Combined Summary".

Two dialog boxes are open in the foreground:

- Runtime Parameters:** This dialog has a title bar "Runtime Parameters - WFLAMDM - 27021 - 05.12.06.00.09 - Windows Intern...". It contains the following fields:
  - Report Name: Fund 27 Combined Summary Report
  - Reporting Month: Entered Month
  - Select Month: June
  - Year: 2012
  - Print Title Page:
  - Print Greenbar:Buttons include "Check Spelling", "Excel", and "Back".
- Runtime Report Setup:** This dialog has a title bar "Runtime Report Setup". It contains the following options:
  - How do you want to change runtime setup?
    - Use current setup - no change
    - Change setup for this run only - do not save
    - Change setup for this run and save setup
  - Report Name: Fund 27 Combined Summary ReportButtons include "Parameters", "Breaks", "Account Ranges", and "Field Selection".

A yellow callout box with the text "Excel allows you to export to Excel." is positioned over the "Excel" button in the "Runtime Parameters" dialog.

The browser's status bar at the bottom shows "Done", "Local intranet", and "100%". The application's footer includes "50 4 records displayed" and "Report Name: [input field] ABC".

Slide 14 - Slide 14

The screenshot shows a web browser window with the title "Budgetary Data Mining - WFLAMDMMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The main content area is titled "Runtime Parameters" and contains the following elements:

- Report Name:** Balance Sheet Detail
- Start Date:** Day of Month: First Day of Fiscal Yr (dropdown), Month: Designated by Day (text input)
- End Date:** Day of Month: Last Day of Fiscal Yr (dropdown), Month: Designated by Day (text input)
- Print Title Page
- Print Greenbar
- Buttons:** Schedule This Report, Back, Add, Edit, Delete, Clone, Print, Excel, Schedule This Report (bottom right)

A yellow callout box with the text "Schedule This Report allows you to set up an automatic running of the report. This concludes the tutorial." is overlaid on the "Schedule This Report" button.