

Slide 1 - Slide 1

The screenshot shows the Skyward Financial Management web application interface. The browser title is "Web Financial Management - WF - 10636 - 05.12.06.00.10 - Windows Internet Explorer". The page header includes the Skyward logo and "Skyward School District 1". A navigation menu contains various modules: Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, Bid Management, and Administration. A search bar is present. The main content area is titled "Financial Management Setup" and is divided into three sections: "Account Management" (with sub-items like Project/Grant Management, Budgetary Data Mining, Reports, Batch Reports), "Budget Management" (with sub-items like Budget Entry, Budget Revisions, Adopt Budget), and "General Inputs" (with sub-items like Journal Entry, Cash Receipts). A yellow callout box is overlaid on the "Account Management" section, containing the following text:

Revenue and Expense Summary

Click Financial Management, Account Management, Budgetary Data Mining.

Who, What, When, Why?

This will allow users to create revenue and expense summary reports on the Web.

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

At the bottom of the interface, 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: "Desktop View" (selected) and "Button Rows", and the system information "Windows XP / Internet Explorer 8". The browser status bar shows "Local intranet" and "100%" zoom.

Slide 2 - Slide 2

The screenshot shows the Skyward Budgetary Data Mining interface. At the top, there is 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. Below this is a toolbar with icons for Task Manager, Favorites, New Window, and My Print Queue. The main area features a 'Views' dropdown set to 'All Report Types' and a 'Filters' dropdown set to '**My Reports'. A table lists various report types, including Balance Sheet Detail, Balance Sheet Summary, Fund 27 Combined Detail Report, Fund 27 Combined Summary Report, and New Detail Report. Two yellow callout boxes provide instructions: one points to the Views and Filters dropdowns, stating 'You can define the Budgetary Data Mining browse using the Views and Filters options.', and the other points to the 'Add' button, stating 'Click Add to create a report.' The bottom of the interface shows a status bar with '50' records displayed and a 'Report Name' field.

Report Name	Report Type
▶ Balance Sheet Detail	Balance Sheet Detail
▶ Balance Sheet Summary	Balance Sheet Summary 11-12 SMITHCAI000
▶ Fund 27 Combined Detail Report	Fund 27 Combined Detail Report SMITHCAI000
▶ Fund 27 Combined Summary Report	Fund 27 Combined Summary Report SMITHCAI000 R
▶ New Detail Report	New Detail Report SMITHCAI000

Slide 3 - Slide 3

The screenshot shows the Skyward Budgetary Data Mining application interface. The browser title bar reads "Budgetary Data Mining - WFVAMDMADM - 27021 - 05.12.06.00.10 - Windows Internet Explorer". The page header includes the Skyward logo and "Skyward School District 1". The user menu shows "Cat Smith", "Account", "Preferences", and "Exit". The main content area is titled "Budgetary Data Mining" and contains a "Report Information" section with the following fields:

- * Report Name:
- * Report Title:
- * Report Type:
- * Add Report For:

On the right side, there are buttons for "Check Spelling", "Save and Add Parameters", and "Back".

Three yellow callout boxes provide instructions:

- Top callout: "Enter the Report Information: Report Name and Report Title." (pointing to the Report Name and Report Title fields)
- Bottom-left callout: "Set the Report Type to Revenue/Expense Summary. Use the Add Report For link to select another user if the report is being built for someone else." (pointing to the Report Type dropdown and the Add Report For link)
- Right callout: "Click Save and Add Parameters when finished." (pointing to the Save and Add Parameters button)

The bottom status bar shows "Local intranet" and "100%" zoom level.

Slide 4 - Slide 4

The screenshot shows the 'Parameters' configuration page in the Skyward Budgetary Data Mining application. The page title is 'Budgetary Data Mining' and the user is 'Cat Smith'. The left sidebar contains navigation options: Report, Information, Parameters (selected), Breaks, Account Ranges, and Field Selection. The main content area is titled 'Parameters' and includes a 'Notes' field with the text 'New Report for New Year'. Below this are several configuration options: 'Consolidate Funds' (radio buttons for Yes and No, with No selected), '* Budget Status' (dropdown menu set to 'All Accounts'), '* Print Detail' (radio buttons for Yes and No, with Yes selected), '* Detail Spacing' (dropdown menu set to 'Single'), '* Print Totals' (radio buttons for Yes and No, with Yes selected), and '* Suppress Zero Amounts' (radio buttons for Yes and No, with Yes selected). There are also sections for 'Report access for other users' (radio buttons for No access, Read only, and Modify, with Read only selected) and 'Add'l printing prompt for current user' (checkbox for Open Account Range Filter screen, which is unchecked). An 'Account exclusions' section has a checkbox for 'Exclude accounts that have' followed by a text input field containing 'no activ'. A 'Check Spelling' button is located in the top right, and a 'Save and Add Breaks' button is in the middle right. A 'Done' button is at the bottom left. The status bar at the bottom shows 'Local intranet' and '100%' zoom.

Set the Parameters.
The **parameters** hold the basic setup information about the report, such as name and how the accounts will be displayed.

Notes are optional.

Select or leave the defaults for:

- Consolidate Funds
- Budget Status
- Print Detail
- Detail Spacing
- Print Totals
- Suppress Zero Amounts

Click Save and Add Breaks when finished setting the parameters.

You can also select the report access, additional printing prompt, and account exclusions.

Slide 5 - Slide 5

The screenshot shows the Skyward Budgetary Data Mining interface. The browser title is "Budgetary Data Mining - WFLAMDMMDM - 27021 - 05.12.06.00.10 - Windows Internet Explorer". The page header includes "Skyward School District 1" and user information "Cat Smith Account Preferences Exit ?". The left sidebar contains navigation options: "Report", "Information", "Parameters", "Breaks", "Account Ranges", and "Field Selection". The main content area is titled "Budgetary D" and shows "Report Type: Revenue/Expense Summary".

Instructional callouts include:

- Select the Breaks.** The breaks define the sort sequence of the accounts, where you want to sub total the sequence of accounts, and how the sub totals should display.
- Select the sort sequence of the accounts for the report.** Sequence: R - Regular Account
- Click Save Breaks and Add Ranges when finished setting the breaks.** Save Breaks and Add Ranges
- Check the position (dimension) of the account number that you want to see a break (sub total) in the report.** Break Levels to include in processing: Ed Position 2. The positions display in the Break Levels browse.
- Select the Break Attributes for the corresponding selected breaks.** Break Level Attributes: Break: Single, Heading: Yes, Separator: No, Dbl Underline: No.

The interface includes a table for "Break Levels to include in processing" with columns "Ed" and "Position 2". The "Break Level Attributes" section has radio buttons for "Heading", "Separator", and "Dbl Underline", each with "Yes" and "No" options. A "Save Breaks and Add Ranges" button is located in the top right of the main area.

Slide 6 - Slide 6

The screenshot shows a web browser window titled 'Budgetary Data Mining - WFVAMDMMDM - 27021 - 05.12.06.00.10 - Windows Internet Explorer'. The interface includes a left-hand navigation menu with options: Report, Information, Parameters, Breaks, Account Ranges (selected), and Field Selection. The main content area is titled 'Account Ranges' and contains the following fields and sections:

- Report Name:** New Report
- Category:** [Empty] **High:** ZZZZZZZZ
- Group:** [Empty] **High:** ZZ-ZZ-ZZZZ
- Account Status:** Active and Inactive Active Inactive
- Operating Statement Accounts:** Expense Revenue
- Low Account:** 00 * 000 000 000000 000
- High Account:** 99 * 999 999 999999 999
- Dimension:**

Low	High
Fund: 00	99
Type: *	*
Location: 000	999
Object: 000	999
Function: 000000	999999
Project: 000	999
- Include Filters for Operating Statement Accts:** [Empty text box] with Add, Edit, and Delete buttons.
- Exclude Filters for Operating Statement Accts:** [Empty text box] with Add and Edit buttons.

Yellow callout boxes provide the following instructions:

- Top Left:** Set the Account Ranges.
- Top Left (larger):** The ranges define the accounts to be included on the report.
- Top Right:** Click Save Ranges and Add Fields when finished setting the account ranges.
- Middle Right:** Set the Category and Group and select the Account Status.
- Middle Right (larger):** Set the Balance Sheet Accounts and the account range for each Dimension.
- Bottom Left:** Add any Include and/or Exclude Filters.

Buttons on the right side include 'Check Spelling', 'Save Ranges and Add Fields', and 'Back'. The bottom status bar shows 'Local intranet' and '100%' zoom.

Slide 7 - Slide 7

The screenshot shows the 'Budgetary Data Mining' interface in a Windows Internet Explorer browser window. The browser title is 'Budgetary Data Mining - WFLAMDMMDM - 27021 - 05.12.06.00.10 - Windows Internet Explorer'. The page header includes the Skyward logo and 'Skyward School District 1'. The user is logged in as 'Cat Smith' with options for 'Account', 'Preferences', and 'Exit'. The main navigation menu on the left includes 'Report Information', 'Parameters', 'Breaks', 'Account Ranges', and 'Field Selection' (which is currently selected). The main content area is titled 'Field Selection' and contains a list of fields: 'Account Number', 'Batch Activity', 'Fiscal Year Activity', 'FYTD Activity', and 'Monthly Activity'. To the right of this list are buttons for 'Select Fields', 'Remove Field', and 'Clone Field'. Below the list are 'Up' and 'Down' buttons. A yellow callout box points to the 'Select Fields' button with the text: 'Click Select Fields for fields to include on this report.' Another yellow callout box is positioned above the field list with the text: 'Set the Field Selections. This option allows you to define the layout on the report. Each selected field will appear as its own column.' To the right of the field list are buttons for 'Save and Back' and 'Back'. Further right, there is a 'Field Parameters' section with input fields for 'Description' (set to 'Account Heading'), 'Heading 1', 'Heading 2' (set to 'Fd T Loc Obj Func Prj'), and 'Length' (set to '23'). Below this is a 'Display' section with radio buttons for 'Number' (selected), 'Description', and 'Short Description'. At the bottom right, there is a 'Report Width' section with a 'Report Width' input field set to '95'. A 'Check Spelling' button is located in the top right corner of the main content area. At the bottom of the page, there is a note: 'Asterisk (*) denotes a required field'. The browser's taskbar at the bottom shows 'Local intranet' and '100%' zoom level.

Slide 8 - Slide 8

The screenshot shows the 'Budgetary Data Mining' application window. The title bar reads 'Budgetary Data Mining - WFLAMDMMDM - 27021 - 05.12.06.00.10 - Windows Internet Explorer'. The application 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' (which is currently selected). The main content area is divided into several sections:

- Report Information:** Fields for 'Report Name' (New Report), 'Report Title' (New Report), and 'Report Type' (Revenue/Expense Summary). A 'Check Spelling' button is present.
- Field Selection:** A list of fields to include in processing: Account Number, Batch Activity, Fiscal Year Activity, FYTD Activity, and Monthly Activity. The 'Monthly Activity' field is selected. To the right are buttons for 'Select Fields', 'Remove Field', and 'Clone Field'. Below the list are 'Up' and 'Down' buttons.
- Field Parameters:** A section for configuring the selected field. It includes a 'Type' selector (Single selected, Combination unselected), a 'Description' field (Monthly Activity), and 'Heading 1' and 'Heading 2' fields (both containing '<M><Y>'). There are also 'Sign' options (Left, OK, Right, Left with %), a 'Year' selector (Current Year), and checkboxes for 'Edited' (checked) and 'Whole Number'. A 'Month To Use' selector (Report selected, Ranges and Auto-generate unselected) is also present.
- Report Width:** A field for 'Report Width' set to 95.

Instructional callouts are provided in yellow boxes:

- A callout pointing to the 'Save and Back' and 'Back' buttons says: 'Select **Save and Back** when finished building the report.'
- A callout pointing to the 'Fields to include in processing' list says: 'The selected fields display in the **Fields to include in processing** browse. **Remove Field** and **Clone Field** options are available to use. Use the **Up/Down** buttons to arrange the fields as you prefer.'
- A callout pointing to the 'Field Parameters' section says: 'Each field will have different **Field Parameters** to review and set when building the report.'

At the bottom left, a note states: 'Asterisk (*) denotes a required field'. The bottom right of the window shows 'Local intranet' and a 100% zoom level.

Slide 9 - Slide 9

Budgetary Data Mining

Report Name:

Report Title:

Report Type:

Field Selection

Views: Filters:

#	Field	Heading 1	Heading 2	Type	Combo field
1	Account Number		Fd T Loc Obj Func Prj		
2	Batch Activity	<Y>	Batch Activity	Single	
3	Fiscal Year Activity	<Y>	FY Activity	Single	
4	FYTD Activity	<Y>	FYTD Activity	Single	
5	Monthly Activity	<M><Y>	Monthly Activity	Single	

5 records displayed

The report is saved. Now, on any of the tabs, the various maintenance options are available for the report. Click Back to return to the browse screen.

Slide 10 - Slide 10

The screenshot shows the Skyward Budgetary Data Mining interface. At the top, there is a navigation menu with options like Home, Account Management, Vendors, Purchasing, etc. Below this is a search bar and a list of reports. The 'New Report' is selected. A yellow callout box points to the 'New Report' row in the table, stating: 'The report now displays in the browse.' Another yellow callout box points to the 'Print' and 'Schedule This Report' buttons on the right, stating: 'Additionally, maintenance options are available on the browse, with the additional option to Schedule This Report. Click Print.'

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	SMITHCAT000		Balance Sheet Summary
▶ Fund 27 Combined Detail Report	Fund 27 Combined Detail Report	SMITHCAT000		Combined B/S and O/S Detail
▶ Fund 27 Combined Summary Report	Fund 27 Combined Summary Report	SMITHCAT000	R	Combined B/S and O/S Summary
▶ New Detail Report	New Detail Report	SMITHCAT000		Revenue/Expense Detail
▶ New Report	New Report	SMITHCAT000	R	Revenue/Expense Summary

Slide 11 - Slide 11

The screenshot shows a web browser window with the URL "Budgetary Data Mining - WFLAMDM - 27021 - 05.12.06.00.10 - Windows Internet Explorer". The main page is titled "Skyward School District 1" and "Budgetary Data". A "Runtime Parameters" dialog box is open, containing the following fields and options:

- Runtime Report Parameters:**
 - Report Name: New Report
 - Reporting Month: Entered 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: New Report

A yellow callout box with the text "Set the Runtime Parameters and click Print." is overlaid on the dialog. The background application shows a sidebar with "Budgetary Data" and a list of report types, with "New Report" selected. The bottom of the browser shows "6 records displayed" and "Report Name:".

Slide 12 - Slide 12

The screenshot shows a Windows Internet Explorer browser window displaying a PDF document. The browser's address bar shows the URL: http://broker6:91/skyread/SKR157289U3A7D7J83993.pdf. The browser's toolbar includes various navigation and utility icons. The PDF content is a report titled "SCRAMBLED DATABASE" with a date of "08/03/12" and "Page:1 9:18 AM". The report header includes "3frbud12.p 31-2" and "05.12.06.00.01". The report body contains a table with columns for "Fd", "T", "Loc", "Ob1", "Func", "Pri", "Batch", and "Activity". A yellow callout box with a black border is overlaid on the report, containing the text: "This is an example of a Revenue and Expense Summary report. This concludes the tutorial." The table data includes entries for "Food Service" and "FUND 04" and "FUND 05".

Fd	T	Loc	Ob1	Func	Pri	Batch	Activity			
02							Food Service			
02	E	000	000	892564	100					
02	E	100	000	000000	100			12,500.01	12,500.01	
02	E	100	000	000000	200		25.00			
02	E	100	000	000000	300					
02	E	100	002	000000	100			776.73	776.73	
02	E	100	229	000000	100			181.65	181.65	
02	E	100	253	000000	100			8.00	8.00	
02	E	100	411	290000	000		171.30			
02	-	-	-	-	-		-196.30	-13,466.39	-13,466.39	
04							FUND 04			
04	E	440	444	000000	000			154.01	154.01	154.01
04	-	-	-	-	-			-154.01	-154.01	-154.01
05							FUND 05			
05	E	400	222	124000	000					
05	-	-	-	-	-					