

Slide 1 - Slide 1

The screenshot shows the Skyward Financial Management Setup interface for Skyward School District 1. The browser title is "Web Financial Management - WF - 10636 - 05.12.06.00.09 - Windows Internet Explorer". The user is logged in as "Cat Smith" with the role "Accountant". A "Print this tutorial" button is visible in the top right. The main navigation menu includes: Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, Bid Management, and Administration. The "Financial Management Setup" section is active, showing three main categories: Account Management, Budget Management, and General Inputs. Under "Account Management", "Budgetary Data Mining" is highlighted. A yellow callout box is overlaid on the interface with the following text:

**Revenue and Expense Detail**

Click Financial Management, Account Management, Budgetary Data Mining.

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

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

The same reporting principals apply 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" (selected), and "Windows XP / Internet Explorer 8". The system tray shows "Local intranet" and "100%" zoom.

Slide 2 - Slide 2

The screenshot shows the Skyward Budgetary Data Mining application in a web browser. 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. The main 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 various reports, including 'Balance Sheet Detail', 'Balance Sheet Summary', 'Fund 27 Combined Detail Report', and 'Fund 27 Combined Summary 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 '4 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

Slide 3 - Slide 3

The screenshot shows the Skyward Budgetary Data Mining application in a web browser. The browser title bar reads "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 user menu shows "Cat Smith" with options for "Account", "Preferences", and "Exit". The main content area is titled "Budgetary Data Mining" and features a left-hand navigation menu with options: "Report Information", "Parameters", "Breaks", "Account Ranges", "Field", and "Source". The "Report Information" section contains the following fields:

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

On the right side, there is a "Check spelling" button and a "Save and Add Parameters" button. A "Back" button is also visible below it.

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)
- Right callout: "Click Save and Add Parameters when finished." (pointing to the Save and Add Parameters button)
- Bottom-left callout: "Set the Report Type to Revenue/Expense Detail. 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)

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

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 - WFLAMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer'. The user is identified as '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 'Detail Report'. 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 No access selected) and 'Add'l printing prompt for current user' (checkbox for 'Open Account Range Filter screen'). An 'Account exclusions' section has a checkbox for 'Exclude accounts that have' followed by a dropdown menu. A 'Check Spelling' button is in the top right, and a 'Save and Add Breaks' button is in the middle right. A 'Back' button is partially visible below the 'Save and Add Breaks' button. A footer note states 'Asterisk (\*) denotes a required field'. The browser's taskbar 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.

**Check Spelling**

**Parameters**

Notes: **Detail Report**

**Notes are optional.**

**Select** or leave the defaults for:

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

Consolidate Funds:  Yes  No

\* Budget Status: **All Accounts**

\* Print Detail:  Yes  No

\* Detail Spacing: **Single**

\* Print Totals:  Yes  No

\* Suppress Zero Amounts:  Yes  No

**Report access for other users**

No access  
 Read only  
 Modify

**Add'l printing prompt for current user**

Open Account Range Filter screen

**Account exclusions**

Exclude accounts that have **no amount**

**Click Save and Add Breaks** when finished setting the parameters.

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

Asterisk (\*) denotes a required field

Slide 5 - Slide 5

The screenshot shows the Skyward Budgetary Data Mining interface. The browser title bar reads "Budgetary Data Mining - WFLAMDMMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The application header includes "Skyward School District 1" and user information "Cat Smith Account Preferences Exit ?". The left sidebar contains a navigation menu with "Report Information", "Parameters", "Breaks", "Account Ranges", "Field Selection", and "Sources". The main content area is titled "Budgetary D" and shows "Report Type: Revenue/Expense Detail".

Instructional callouts are provided in yellow boxes:

- 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 with columns Fd, T, Loc, Obj, Func, and Prj. The "Break Level Attributes" section includes a dropdown for "Break" (set to Single) and radio button options for "Heading", "Separator", and "Dbl Underline".

Slide 6 - Slide 6

The screenshot shows the 'Account Ranges' configuration screen in the Skyward Budgetary Data Mining application. The interface includes a left-hand navigation menu with options like 'Report', 'Information', 'Parameters', 'Breakdown', 'Account Ranges', 'Field Selection', and 'Sources'. The main content area is titled 'Account Ranges' and contains several sections: 'Category and Group' with input fields for 'Category' and 'Group', and radio buttons for 'Account Status' (Active and Inactive, Active, Inactive); 'Operating Statement Accounts' with checkboxes for 'Expense' and 'Revenue', and 'Low Account' and 'High Account' fields; 'Dimension Low' and 'Dimension High' sections with input fields for Fund, Type, Location, Object, Function, and Project; and an 'Include Filters for Operating Statement Accts' section with 'Add', 'Edit', and 'Delete' buttons. Several yellow callout boxes provide instructions: 'Set the Account Ranges. The ranges define the accounts to be included on the report.' points to the 'Low' and 'High' account fields; 'Click Save Ranges and Add Fields when finished setting the account ranges.' points to the 'Save Ranges and Add Fields' button; 'Set the Category and Group and select the Account Status.' points to the 'Category', 'Group', and 'Account Status' fields; 'Set the Balance Sheet Accounts and the account range for each Dimension.' points to the 'Dimension Low' and 'Dimension High' fields; and 'Add any Include and/or Exclude Filters.' points to the 'Include Filters' section.

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 - 05.12.06.00.09 - Windows Internet Explorer'. The page header includes the Skyward logo and 'Skyward School District 1'. The user is logged in as 'Cat Smith'. The main navigation menu on the left includes 'Report Information', 'Parameters', 'Breaks', 'Account Ranges', 'Field Selection', and 'Sources'. The 'Field Selection' section is active, showing a list of fields to include in processing: 'Account Number', 'Batch Activity', 'Fiscal Year Activity', 'FYTD Activity', and 'Monthly Activity'. A yellow callout box explains that this option allows defining the report layout, with each selected field appearing as its own column. Another callout box points to a 'Select Fields' button, instructing the user to click it for fields to include. The 'Field Parameters' section shows 'Description' set to 'Account Heading', 'Heading 1' and 'Heading 2' as empty fields, and 'Length' set to 23. The 'Display' section has radio buttons for 'Number' (selected), 'Description', and 'Short Description'. The 'Report Width' is set to 95. A footer note states 'Asterisk (\*) denotes a required field'. The browser's taskbar shows 'Task Manager', 'Favorites', 'New Window', and 'My Print Queue' buttons. The system tray at the bottom indicates 'Local intranet' and '100%' zoom.

Slide 8 - Slide 8

Budgetary Data Mining - WFLAMDM - 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

Parameters

Breaks

Account Ranges

Field Selection

Sources

Report Name:

Report Title:

Report Type:

Field Selection

Fields to include in processing

- Account Number
- Batch Activity
- Fiscal Year Activity
- FYTD Activity
- Monthly Activity

Select Fields

Remove Field

Clone Field

Save and Add Sources

Back

Type:  Single  Combination

Description:

Heading 1:

Each field will have different Field Parameters to review and set when building the report.

Sign:  Left  CR  Right  Left with %

Year:

Edited  Whole Number

Month To Use:  Report  Ranges  Auto-generate

Report Width

Report Width:

Asterisk (\*) denotes a required field

Local intranet 100%



Slide 9 - Slide 9

The screenshot shows the 'Budgetary Data Mining' application window. The title bar reads 'Budgetary Data Mining - WFLAMDMMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer'. The interface includes a left-hand navigation menu with options like 'Report', 'Information', 'Parameters', 'Breaks', 'Account Ranges', 'Field Selection', and 'Sources'. The main content area is titled 'Budgetary Data Mining' and contains a 'Sources' table and several configuration options. Three yellow callout boxes provide instructions: one at the top says 'Select the Sources. This option allows you to choose the Accounting Sources for the report.'; a second one points to the 'Sources' table with the text 'Select the Sources to include on the report and select which sources should include Detail.'; and a third one at the bottom says 'Select the other Sources options per your report needs.' The 'Sources' table has columns for 'Sources' and 'Detail'. The 'Sources' column lists items like 'AP = Accounts Payable', 'AR = Accounts Receivable', 'CR = Cash Receipts', 'JE = Journal Entries', 'PR = Payroll', 'CD = Cash Disbursements', and 'PO = Purchase Orders'. The 'Detail' column has checkboxes for each. To the right of the table are sections for 'Print All Accounts', 'Purchase Order Parameters', and 'Include Budget Requisitions'. A 'Save' button is visible in the top right corner.

Select the **Sources**.

This option allows you to choose the **Accounting Sources** for the report.

Sources	Detail
<input checked="" type="checkbox"/> AP = Accounts Payable	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> AR = Accounts Receivable	<input checked="" type="checkbox"/>
<input type="checkbox"/> Include Payments/Unapplied	
<input type="checkbox"/> Include Cash Receipts/Deposits	
<input checked="" type="checkbox"/> CR = Cash Receipts	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> JE = Journal Entries	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> PR = Payroll	<input checked="" type="checkbox"/>
<input type="checkbox"/> CD = Cash Disbursements	<input type="checkbox"/>
<input checked="" type="checkbox"/> PO = Purchase Orders	<input checked="" type="checkbox"/>
<input type="checkbox"/> T	
<input type="checkbox"/> R	
<input type="checkbox"/> T	

Select the **Sources** to include on the report and select which **sources** should include **Detail**.

Select the other **Sources** options per your report needs.

Click **Save** when finished building the report.

Print All Accounts

Print Monthly Totals

Print Account Summary

Print Only Source Totals (Suppress detail)

Print Accumulated Detail Subtotals

Truncate Detail Fields

**Purchase Order Parameters** ?

Print all open Purchase Orders as of the report end date and beyond

Print only Purchase Orders open as of the report end date (month/year)

Include Budget Requisitions ?

Print Approved Status

Print Denied Status

Print Pending Status

Detail Description:  Short  Long

ITCR = Insurance Tracking Cash Receipts

FXAD = Fixed Assets Disposals/Additions

FXDP = Fixed Assets Depreciation

YP = Prior Year Adjustments

SB = Student Billing

Sign:  Left  CR  Right

Slide 10 - Slide 10

The screenshot shows the Skyward Budgetary Data Mining application. The browser title is "Budgetary Data Mining - WFLAMDMMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer". The user is logged in as "Cat Smith". The application has a menu bar 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. The main area is titled "Budgetary Data Mining" and contains a "Report" section with fields for Report Name, Report Title, and Report Type. A yellow callout box states: "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." Below the report fields is a "Sources" section with a list of account types and checkboxes for inclusion. To the right, there are "Print" and "Excel" buttons, and a "Purchase Order Parameters" section with checkboxes for printing options. The bottom of the window shows "Local intranet" and "100%" zoom.

Slide 11 - Slide 11

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 table of reports. The table has columns for Report Name, Report Title, Created By, Access, and Report Type. The 'New Detail Report' is highlighted. To the right of the table are buttons for Add, Edit, Delete, Clone, Print, Excel, and Schedule This Report. A yellow callout box points to the 'Print' button with the text 'Click Print.' Another yellow callout box points to the 'Schedule This Report' button with the text 'Additionally, maintenance options are available on the browse, with the additional option to Schedule This Report.' A third yellow callout box points to the 'New Detail Report' row with the text 'The report now displays in the browse.'

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

Slide 12 - Slide 12

The screenshot shows a web browser window with the title 'Budgetary Data Mining - WFLAMDM - 27021 - 05.12.06.00.09 - Windows Internet Explorer'. The main content area displays 'Skyward School District 1' and 'Budgetary Data' navigation options. A 'Runtime Parameters' dialog box is open, containing the following fields and options:

- Runtime Report Parameters:**
  - Report Name: New Detail Report
  - Start Date: 06/01/2012 (Friday)
  - End Date: 06/30/2012 (Saturday)
  - 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 Detail 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 list of report types, with 'New Detail Report' selected. The browser status bar at the bottom indicates 'Local intranet' and '100%' zoom.

Slide 13 - Slide 13

http://broker6:91/skyread/SKR157075Y2N4F9M33993.pdf - Windows Internet Explorer

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3frbud12.p 31-2  
05.12.06.00.01

SCRAMBLED DATABASE  
New Detail Report (Date: 06/01/2012 - 06/30/2012)

08/02/12 Page:1  
2:51 PM

2011-12 2012

Fd T Loc Obi Func Pri Batch Activity FY Acti

06 FUND 6

This is an example of a Revenue and Expense Detail report.

This concludes the tutorial.

Date	Erc	Sub	Batch	Vendor Name/Ref	Inv Date	Chk#/Rec#	Check Date	Amount
06	E	333	100	110000 000				
*06 E 333 100 110000 000 0.00								
GENERAL, FUND,								
-----								
10	E	000	000	000000 000				
				-183,229.00				268.32
				268.32				268.32
06/30/12	AP	25		A & G COMPUTERS LTDESCR	1200022		Email PO Test	12.30
06/30/12	PR	PREC	TEA	Andre O Blackerbyscr			TEACHER	2,685.25
06/30/12	PR	PREC	TEA	Andre O Blackerbyscr			TEACHER	2,685.25
June								
*10 E 000 000 000000 000								
*Accounts Payable								
*Payroll								
-----								
*10 E 000 000 000000 000 0.00								
-----								
10	E	000	000	000000 011				
				20.00				1,570.03
				1,570.03				320.00
06/30/12	AP			APCHKREQ Tanya I Fritzeser	0		stuff	250.00
June								
*10 E 000 000 000000 011								
*Accounts Payable								
-----								
10	E	000	000	000000 328				
				400.00				2,002.02
				2,002.02				462.02
06/01/12	AP	ms		Allen X Megarrityscr	1200007		Tests	125.00
06/01/12	AP	ms		Allen X Megarrityscr	1200007		Tests	125.00