

Skyward User's Manual

Skyward School Business Suite Budgetary Data Mining Primer

Prepared for
Hernando County School District

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Version 1.0



DOCUMENT CONTROL

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Overview

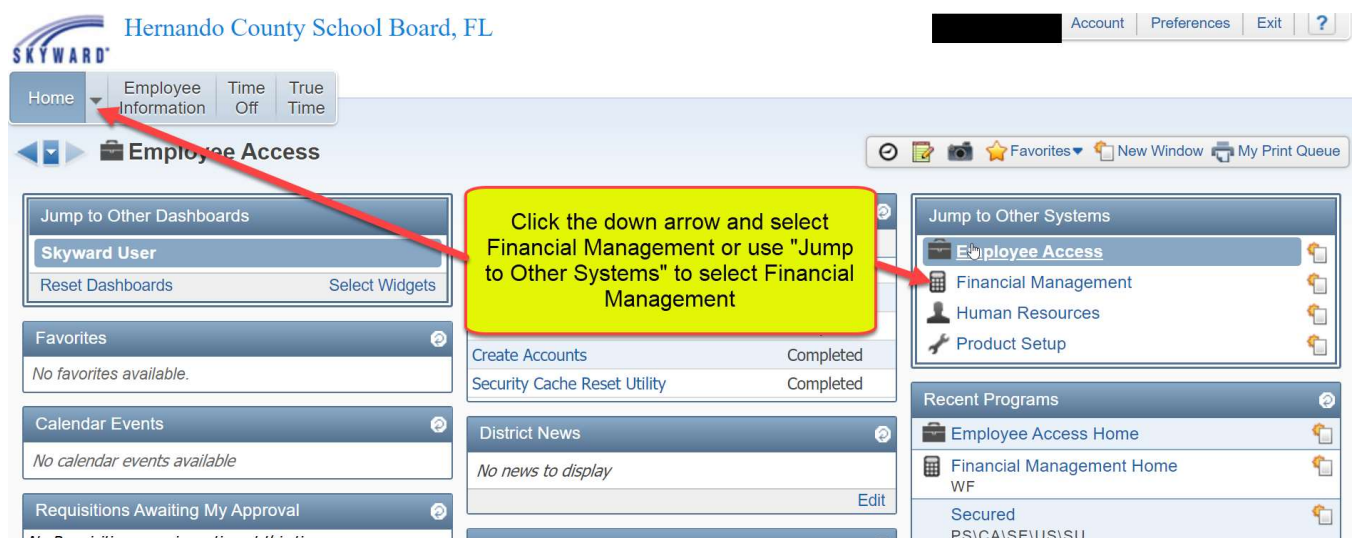
Skyward has powerful reporting and data mining tools built in that can assist you obtain data that you require to perform your job duties. This tutorial instructs you on basic budgetary data mining from Skyward on a demand basis.

Please note this is a primer and basic and you will acquire greater skill and better results the more you apply these lessons and work within the system. Additionally, as in all areas of Skyward, the data you can pull from the system and have appear on reports will be limited by your security settings and location.

Step 1: Navigate to Financial Management main screen.

Budgetary Data Mining is generated under the Financial Management Module. Verify that you are in the Financial Management Module.


NAVIGATE TO THE FINANCIAL MANAGEMENT MODULE



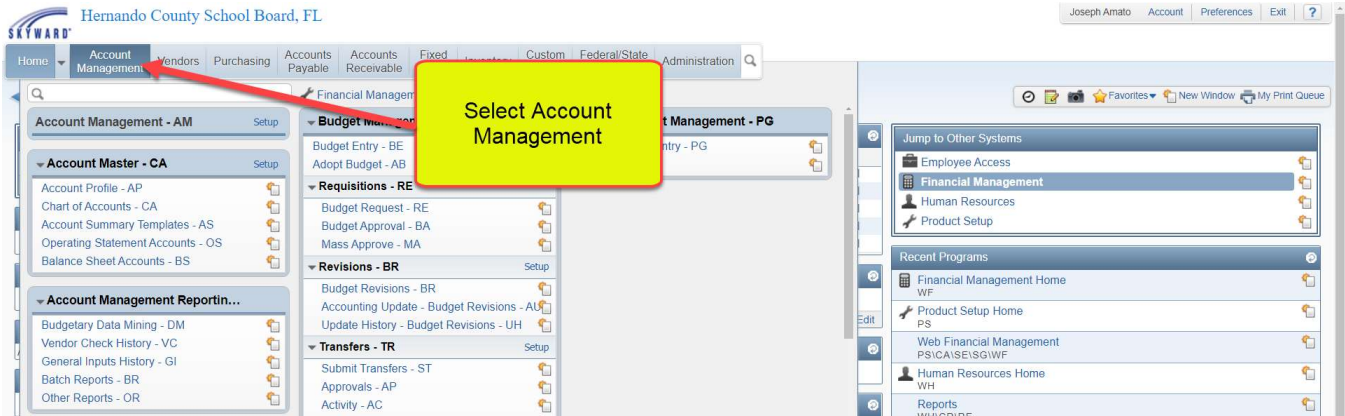
From the Main Screen

1a) Click on *JUMP TO OTHER SYSTEMS*: Financial Management; or,

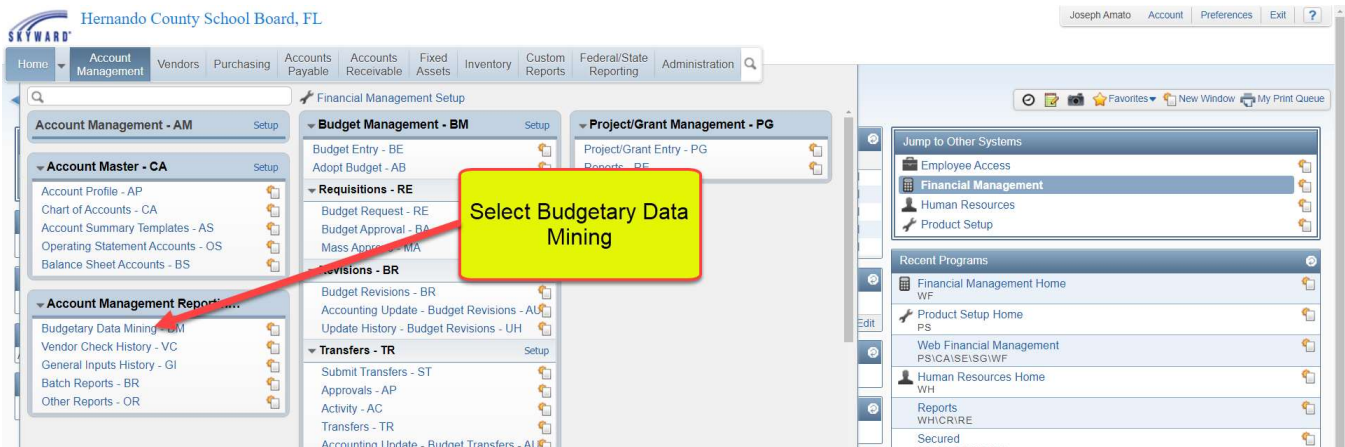
1b) Click the  Button and select Financial Management from the selection of systems.

***PLEASE NOTE:** The number of buttons you may see across the top of the screen next to the Home button , will vary dependent upon your security settings.

Step 2: Select Account Management



2a) Select Budgetary Data Mining



Step 3: Create Budgetary Data Mining Report

3a) Select Add to create new Budgetary Data Mining Report

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Joseph Amato Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory Custom Reports Federal/State Reporting Administration

Budgetary Data Mining

Views: All Report Types

Select Add to Create New Report

| Report Name | Report Title | Favorite | Code | Category | FFBMR ID |
|---------------------------------|-------------------------|----------|-------------|----------|-------------------------|
| 0052 | 0052 | ★ | G | Summary | 1,617 |
| 0331 | 0331 | ★ | B | Summary | 5,071 |
| 2131 Health Ins | 2131 2132 Health Ins | ★ | A | | 2,710 |
| 2300 Health Insurance | Expenses | ★ | GORESLEI000 | R | Revenue/Expense Summary |
| 9410 cost center | Budget Status Summary | ★ | GORESLEI000 | M | Revenue/Expense Summary |
| 9910 cost center | Budget Status Summary | ★ | GORESLEI000 | M | Revenue/Expense Summary |
| BUDGET FUNC/OBJ SUMMARY | BUDGET FUNC/OBJ SUMMARY | ★ | NASH JOH000 | M | Revenue/Expense Summary |
| BUDGET FUNC/OBJ SUMMARY | BUDGET FUNC/OBJ SUMMARY | ★ | SITTIKEN000 | M | Revenue/Expense Summary |
| BUDGET FUNC/OBJ SUMMARY DEBT | BUDGET FUNC/OBJ SUMMARY | ★ | SITTIKEN000 | M | Revenue/Expense Summary |
| BUDGET FUNC/OBJ SUMMARY FUND 11 | BUDGET FUNC/OBJ SUMMARY | ★ | SITTIKEN000 | M | Revenue/Expense Summary |
| BUDGET FUNC/OBJ SUMMARY GENFUN | BUDGET FUNC/OBJ SUMMARY | ★ | SITTIKEN000 | M | Revenue/Expense Summary |
| BUDGET FUNC/OBJ SUMMARY SPEC RE | BUDGET FUNC/OBJ SUMMARY | ★ | SITTIKEN000 | M | Revenue/Expense Summary |
| Budget Status 0251 AP | Budget Status 0251 | ★ | SITTIKEN000 | R | Revenue/Expense Summary |
| Budget Status 0004 | Budget Status 0004 | ★ | SITTIKEN000 | R | Revenue/Expense Summary |

Buttons: Add, View, Delete, Clone, Print, Excel, Import Layout, Export Layout, Schedule This Report

3b) Type in a unique Name and Title for the Report

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Budgetary Data Mining

Report Information

* Report Name:

* Report Title:

* Report Type: Revenue/Expense Summary

* Add Report For: AMATO JOSEPH AMATOJOS000

Asterisk (*) denotes a required field

Type in a Unique Name and Title for the Report

3c) Select the type of Report Desired from Dropdown

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Budgetary Data Mining

Report Information

* Report Name: TEST

* Report Title: TEST

* Report Type: Revenue/Expense Summary

* Add Report For: Revenue/Expense Detail AMATOJOS000

Revenue/Expense Summary

Balance Sheet Detail

Balance Sheet Summary

Combined B/S and O/S Detail

Combined B/S and O/S Summary

Asterisk (*) denotes a required field

Select Type of Report

3d) Click Save and Add Parameters

Budgetary Data Mining

Report Information

* Report Name:

* Report Title:

* Report Type: Revenue/Expense Summary

* Add Report For: AMATO JOSEPH AMATOJOS000

Asterisk (*) denotes a required field

Buttons: Save and Add Parameters, Back

3e) Select the appropriate parameters for the report then click Save and Add Breaks

Budgetary Data Mining

Parameters

Notes:

* 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 activity for the month selected

Report access for other users

☒ No access
☐ Read only
☐ Modify

Add'l printing prompt for current user

☐ Open Account Range Filter screen


Asterisk (*) denotes a required field

Buttons: Save and Add Breaks, Back

1. Type any Notes in the first box. This is an area for reminders that indicate the use of the report.
2. If Consolidate Funds is set to Yes then the sorting of the accounts will ignore the Fund. Example: 10E001 2660 00 and 20E001 2660 00 are not sequentially next to each other, however if Consolidate Funds is set to Yes, then they will appear near each other since the sorting of accounts will begin at Location instead of Fund.

3. Budget Status, you can Select All Accounts, Unexpended Balance - Revised Budget - Activity or Unencumbered Balance – Revised Budget – Activity – Encumbered Amount.
4. Print Detail works with the Breaks tab to the accounts that display. By selecting Yes, every account in the range will display. By select No, the report will only show subtotals based on the breaks that have been setup. For example, a user could roll up each Fund and Location.
5. Print Totals prints a grand total at the very end of the report.
6. Suppress Zero Amounts leaves a blank space in place of any field that would be \$0.00.
7. Account exclusions allow for additional account exclusions. Check the box and then select from the drop-down menu.
8. Report Access for Other Users, if selected allows others to see and run your reports.
9. If checked Addt'l Printing Prompt for Current User will force the user to select an account range before printing.

3f) Select the Sequence from the Drop Down if applicable then enter the Breaks as needed, then Click Save Breaks and Add Ranges (If you do not need to make any changes here just Click Save Breaks and Add Ranges)

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Budgetary Data Mining

Report Information
Parameters
Breaks
Account Ranges
Field Selection

Report Name: TEST
Report Title: TEST
Report Type: Revenue/Expense Summary

Breaks
Sequence: R - Regular account sequence

2 Fund T Func Obj Fac Proj Subpr Prog

1

4 Save Breaks and Add Ranges
Back

Break Levels to include in processing

Break Level Attributes
Break: Single
Heading: Yes No
Separator: Yes No
Dbl Underline: Yes No

3

3g) On the Account Ranges field set the subset of fields that you wish to see on the report. If you wish to see all your accounts, skip to the next step. Once you set ranges then click Save Ranges and Add Fields.

Budgetary Data Mining

Report Name: TEST
Report Title: TEST
Report Type: Revenue/Expense Summary

Account Ranges

Low High
Category: Group: ZZ-ZZ-ZZZZ
Group: ZZ-ZZ-ZZZZ

Account Status: ☒ Active and Inactive ☐ Active ☐ Inactive

Operating Statement Accounts

☒ Expense ☒ Revenue
Low Account: 0000 * 0000 0000 0000 00000 00000 000
High Account: 9999 * 9999 9999 ZZZZ ZZZZZ ZZZZZ ZZZ

Dimension Low High

Fund: 0000 9999
Type: * *
Function: 0000 9999
Object: 0000 9999
Facility: 0000 ZZZZ
Project: 00000 ZZZZZ
Subproject: 00000 ZZZZZ
Program: 00000 ZZZZZ

Include Filters for Operating Statement Accts

Exclude Filters for Operating Statement Accts

Click Save Ranges and Add Fields

Set Ranges and Filters as Needed

*** PLEASE NOTE:** No matter what you specify in the ranges, you cannot receive information on accounts if you do not have access to those accounts.

3h) Select the Fields to include in the report. Add and Delete fields in the Fields to Include in Processing Field, then select the Display you need, then Click Save and Back.

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Budgetary Data Mining

Report Information
Parameters
Breaks
Account Ranges
Field Selection

Report Name: TEST
Report Title: TEST
Report Type: Revenue/Expense Summary

Field Selection

Fields to include in processing
Account Number

Select Fields
Remove Field
Clone Field

Field Parameters

Description: Account Heading
Heading 1:
Heading 2: FundTFunc Obj Fac Proj Subpr Proc
Length: 37

Display

☒ Number
☐ Description
☐ Short Description

Report Width
Report Width: 37

Up Down

Asterisk (*) denotes a required field

Click Save and Back

Select the Fields to Include in the Report

Select the Display

Step 4: Print Your Budgetary Data Mining Report

Select Print to create a .pdf report or Excel to export into an Excel Spreadsheet.

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Home Account Management Vendors Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory Custom Reports Federal/State Reporting Administration

Budgetary Data Mining

Report Information
Parameters
Breaks
Account Ranges
Field Selection

Report Name: TEST
Report Title: TEST
Report Type: Revenue/Expense Summary

Field Selection

Views: All Field Selections Filters: *Skyward Default

| # | Field | Heading 1 | Heading 2 | Type | Combo field | Calculation | Len | Format |
|---|----------------|-----------|----------------------------|------|-------------|-------------|-----|--------|
| 1 | Account Number | | FundTFunc Obj Fac Proj Sub | | | | 37 | |

Click Print or Excel

Print
Excel