Skyward User's Manual

Skyward School Business Suite
Budgetary Data Mining Primer

Prepared for
Hernando County School District

Date: September 24, 2019
Version 1.0

DOCUMENT CONTROL

Author	Skyward Configuration Management Team
Title	Skyward School Business Suite: Time and Attendance Sheets
File Name	Skyward Training-Time and Attendance Sheets-1.0.docx
Milestone	Configuration Management
Last Edited	10/1/2019 3:04 PM
Number of Pages	8

| Version	Revision Date	Revision Comments	Author
1.0	09/24/2019	Created Document	Joe Amato

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
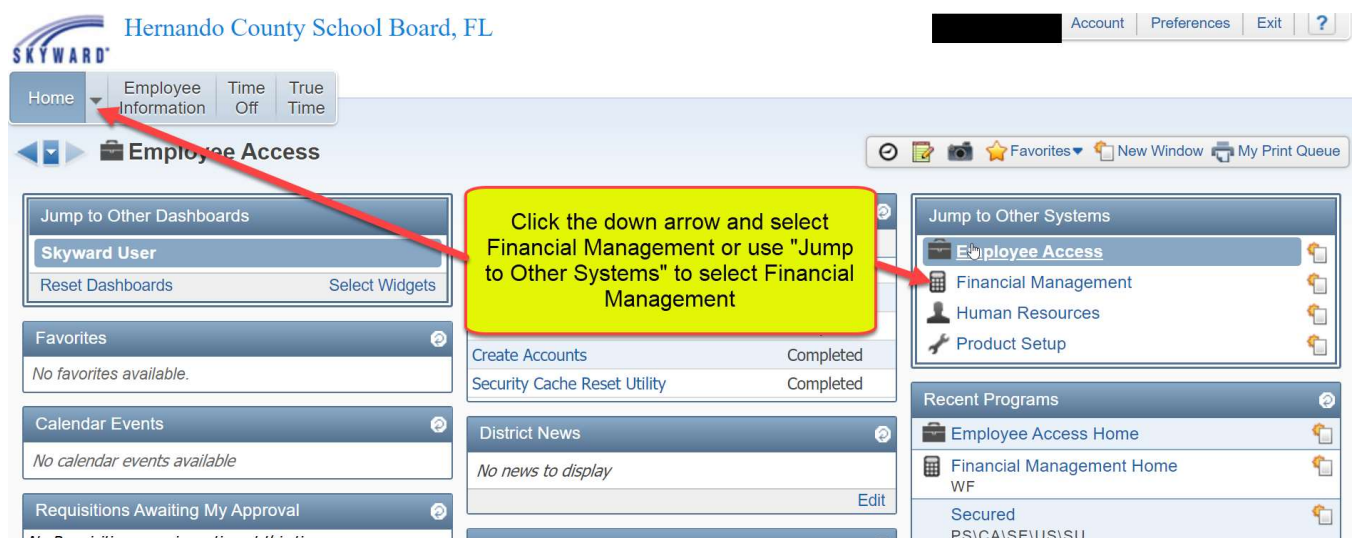
From the Main Screen

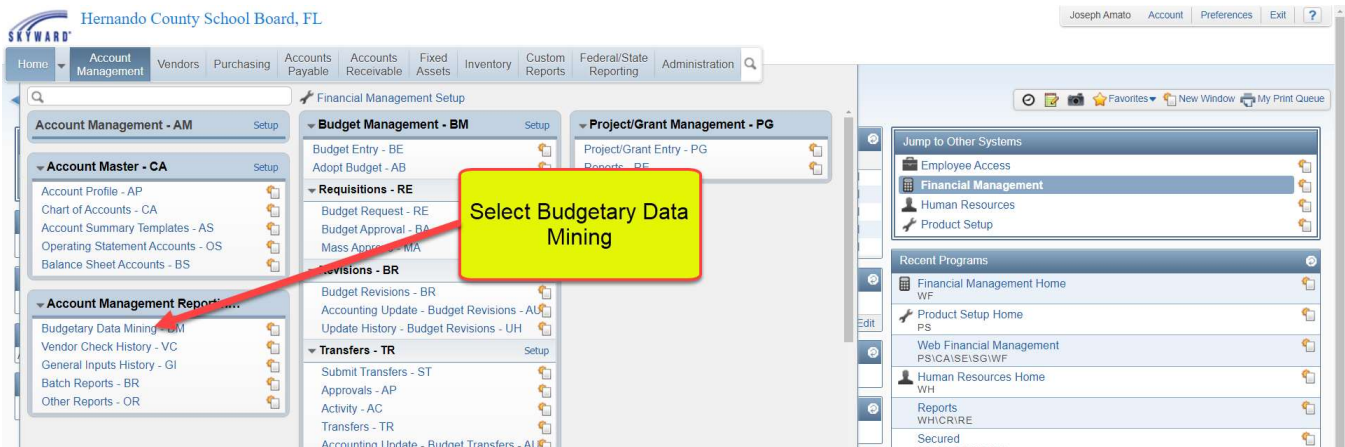1a) Click ON JUMP TO OTHER SYSTEMS: Financial Management; or,

1b) Click the [Home] 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 [Home ▾], will vary dependent upon your security settings.

Step 2: Select Account Management
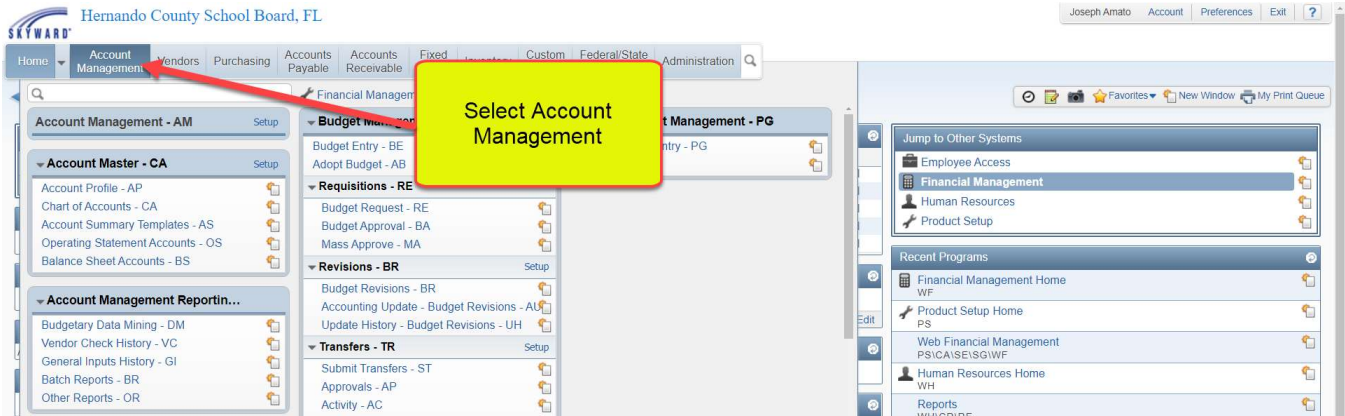
2a) Select Budgetary Data Mining

Step 3: Create Budgetary Data Mining Report

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

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

3c) Select the type of Report Desired from Dropdown

3d) Click Save and Add Parameters

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

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)

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.

* 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.

Step 4: Print Your Budgetary Data Mining Report

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