

BUDGETARY DATA MINING IN SKYWARD WEB MODULE

The screenshot displays the Skyward Web Module interface for Pine Tree Independent School District. The browser window title is "Web Financial Management - WF - 10636 - 05.13.06.00.05-10.2 - Windows Internet Explorer". The URL is "https://skyweb.ptisd.org/scripts/wsa.dll/WService=wsFin/sfmhom01.w". The user is logged in as Tammy Torres.

The interface includes a top navigation bar with tabs: Account Management, Vendors, Purchasing, and Accounts Payable. A search bar is also present. The main content area is divided into several sections:

- Jump to Other Dashboards:** Includes links for *Calendar, Skyward User, Employee, Task Manager, and Reset Dashboards.
- Calendar Events:** Displays "No calendar events available".
- Favorites:** Includes links for Employee Access, Quick Entry, My Requests, Unsubmitted, Financial Management, Requisitions, Approve, Submit, View My Purchase Orders, Approve Requisitions, Vendor Browse, Operating Statement Accounts, and Edit Favorites.
- Jump to Other Systems:** Includes links for Employee Access, Financial Management, and Product Setup. A blue arrow labeled "1." points to the "Financial Management" link.
- District Information:** Displays "PINE TREE INDEPENDENT SCHOOL DISTRICT" and its address: 1701 PINE TREE RD, PO BOX 5878, LONGVIEW TX 75608.
- Web Favorites:** Includes a link to "Add links to your favorite sites on the web."
- Customer Access Requests:** Displays "You are not setup to use Customer Access".
- Available Funds:** Displays "Expense Budget Totals - EXPENDITURE ACCOUNTS" and "Budget Amount: \$13,416,608.88".
- Task Manager (17):** Displays a table of tasks.
- Weather:** Displays "Displaying weather for 75608 (change). Conditions for Longview, TX at 3:52 pm CDT Tuesday, August 06, 2013".
- Credit Card Transactions Awaiting My Approval:** Displays "You do not have access to approve credit card transactions".
- My Print Queue:** Displays "No items available."
- Notifications:** Displays "You do not have any unread notifications."

A blue arrow labeled "2." points to the "Account Management" link in the top navigation bar.

1.) FROM SKYWARD WEB MODULE HOME SCREEN CLICK ON FINANCIAL MANAGEMENT.

2.) CLICK ON ACCOUNT MANAGEMENT.

Web Financial Management - WF - 10636 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/sfmlhom01.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

3. **Account Master** Setup

- Chart of Accounts
- Account Summary Templates
- Operating Statement Accounts
- Balance Sheet Accounts

Account Management Reporting

- Budgetary Data Mining

Project/Grant Management

- Reports

Budget Management Setup

- Budget Entry
- Requisitions**
 - Budget Request
 - Budget Approval
- Transfers**
 - Submit Transfers

Job Status

No items available.

Credit Card Transactions Awaiting My Approval

You do not have access to approve credit card transactions

Weather

Displaying weather for 75608 (change)
 Conditions for Longview, TX at 3:52 pm CDT
 Tuesday, August 06, 2013

Current Conditions:
 Partly Cloudy 99°F

Submit

- View My Purchase Orders
- Approve Requisitions
- Vendor Browse
- Operating Statement Accounts
- Edit Favorites

Task Manager (17)

Date	Task Summary	Subject
Mon Mar 05 10:41am	Requisition Approval	0000016567
Tue Mar 20 8:11am	Requisition Approval	0000016745
Fri Apr 13 2:03pm	Requisition Approval	0000017166

Web Favorites

Add links to your favorite sites on the web.
 Add Web Favorite

Customer Access Requests

You are not setup to use Customer Access

Available Funds

as of 08/06/13 at 2:00 AM

Expense Budget Totals - EXPENDITURE ACCOUNTS
 Budget Amount: \$13,416,609.88

3.) YOU WILL GET A DROP DOWN BOX. UNDER ACCOUNT MANAGEMENT REPORTING CLICK ON BUDGETARY DATA MINING.

Budgetary Data Mining - WF\AM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsfin/famdmbrws000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining

Views: Revenue and Expense Reports - Detail and Summary Filters: **My Reports

Report Name	Report Title	Created By	Access
1 ▸ 001 HIGH SCHOOL	001 HIGH SCHOOL	TORRETAM000	M
2 ▸ 001 HIGH SCHOOL 1	001 HIGH SCHOOL 1	TORRETAM000	M
3 ▸ 199 COUNSELOR ALL CAMPUSES	199 COUNSELOR ALL CAMPUSES	TORRETAM000	M
4 ▸ 199 COUNSELOR ASSESSMENT ONLY	199 COUNSELOR ASSESSMENT ONLY	TORRETAM000	M
5 ▸ ACCOUNT DETAIL	ACCOUNT DETAIL	TORRETAM000	
6 ▸ ACTIVITY FUND	ACTIVITY FUND	TORRETAM000	
7 ▸ ALLISON GILLENLINE-DETAIL	ALLISON GILLENLINE-DETAIL	TORRETAM000	
8 ▸ ATHLETIC BUDGET	ATHLETIC BUDGET	TORRETAM000	
9 ▸ ATHLETIC BUDGET	ATHLETIC BUDGET	TORRETAM000	
10 ▸ DATA PROCESSING	DATA PROCESSING	TORRETAM000	
11 ▸ ELEMENTARY BUDGET	ELEMENTARY BUDGET	TORRETAM000	
12 ▸ EXPENSE SUMMARY	EXPENSE SUMMARY	TORRETAM000	
13 ▸ EXPENSE SUMMARY-PACE	EXPENSE SUMMARY	TORRETAM000	
14 ▸ INTERMEDIATE ACTIVITY FUNDS	INTERMEDIATE ACTIVITY FUNDS	TORRETAM000	
15 ▸ JR HIGH BUDGET	JR HIGH BUDGET	TORRETAM000	
16 ▸ PERSONNEL BUDGET	PERSONNEL BUDGET	TORRETAM000	
17 ▸ PRIMARY BUDGET	PRIMARY BUDGET	TORRETAM000	
18 ▸ PUBLIC RELATIONS	PUBLIC RELATIONS	TORRETAM000	R
19 ▸ TAMMY TEST	TAMMY TEST	TORRETAM000	
20 ▸ TECHNOLOGY BUDGET	TECHNOLOGY BUDGET	TORRETAM000	M

500 20 records displayed Report Name: ABC

Buttons: Add, Edit, Delete, Clone, Print, Excel, Schedule This Report

4.) HERE IS THE SCREEN YOU WILL SEE.

Budgetary Data Mining - WFAAM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/famdmbrws000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining

Filters: **My Reports

5. vs: Revenue and Expense Reports - Detail and Summary

All Report Types

		Created By	Access
1	Revenue and Expense Reports - Detail and Summary	TORRETAM000	M
2	Balance Sheet - Detail and Summary	TORRETAM000	M
3	Combined Balance Sheet and Operating Statement - Detail and Summary	TORRETAM000	M
4	199 COUNSELOR ALL CAMPUSES	TORRETAM000	M
5	199 COUNSELOR ASSESSMENT ONLY	TORRETAM000	M
6	ACCOUNT DETAIL	TORRETAM000	
7	ACTIVITY FUND	TORRETAM000	
8	ALLISON GILLENLINE-DETAIL	TORRETAM000	
9	ATHLETIC BUDGET	TORRETAM000	
10	ATHLETIC BUDGET	TORRETAM000	
11	DATA PROCESSING	TORRETAM000	
12	ELEMENTARY BUDGET	TORRETAM000	
13	EXPENSE SUMMARY	TORRETAM000	
14	EXPENSE SUMMARY-PACE	TORRETAM000	
15	INTERMEDIATE ACTIVITY FUNDS	TORRETAM000	
16	JR HIGH BUDGET	TORRETAM000	
17	PERSONNEL BUDGET	TORRETAM000	
18	PRIMARY BUDGET	TORRETAM000	
19	PUBLIC RELATIONS	TORRETAM000	R
20	TAMMY TEST	TORRETAM000	
21	TECHNOLOGY BUDGET	TORRETAM000	M

500 20 records displayed

Report Name: A B C

Buttons: Add, Edit, Delete, Clone, Print, Excel, Schedule This Report

5.) UNDER VIEWS YOU HAVE DIFFERENT OPTIONS. PLEASE CHOOSE REVENUE AND EXPENSE REPORTS- DETAIL AND SUMMARY.

Budgetary Data Mining - W:\AM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WService=ws1inyfamdmbrws000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining

Views: Revenue and Expense Reports - Detail and Summary

6.

Report Name	Report Title	Created By	Access
1 ▶ 001 HIGH SCHOOL	001 HIGH SCHOOL	TORRETAM000	M
2 ▶ 001 HIGH SCHOOL 1	001 HIGH SCHOOL 1	TORRETAM000	M
3 ▶ 199 COUNSELOR ALL CAMPUSES	199 COUNSELOR ALL CAMPUSES	TORRETAM000	M
4 ▶ 199 COUNSELOR ASSESSMENT ONLY	199 COUNSELOR ASSESSMENT ONLY	TORRETAM000	M
5 ▶ ACCOUNT DETAIL	ACCOUNT DETAIL	TORRETAM000	
6 ▶ ACTIVITY FUND	ACTIVITY FUND	TORRETAM000	
7 ▶ ALLISON GILLENLINE-DETAIL	ALLISON GILLENLINE-DETAIL	TORRETAM000	
8 ▶ ATHLETIC BUDGET	ATHLETIC BUDGET	TORRETAM000	
9 ▶ ATHLETIC BUDGET	ATHLETIC BUDGET	TORRETAM000	
10 ▶ DATA PROCESSING	DATA PROCESSING	TORRETAM000	
11 ▶ ELEMENTARY BUDGET	ELEMENTARY BUDGET	TORRETAM000	
12 ▶ EXPENSE SUMMARY	EXPENSE SUMMARY	TORRETAM000	
13 ▶ EXPENSE SUMMARY-PACE	EXPENSE SUMMARY	TORRETAM000	
14 ▶ INTERMEDIATE ACTIVITY FUNDS	INTERMEDIATE ACTIVITY FUNDS	TORRETAM000	
15 ▶ JR HIGH BUDGET	JR HIGH BUDGET	TORRETAM000	
16 ▶ PERSONNEL BUDGET	PERSONNEL BUDGET	TORRETAM000	
17 ▶ PRIMARY BUDGET	PRIMARY BUDGET	TORRETAM000	
18 ▶ PUBLIC RELATIONS	PUBLIC RELATIONS	TORRETAM000	R
19 ▶ TAMMY TEST	TAMMY TEST	TORRETAM000	
20 ▶ TECHNOLOGY BUDGET	TECHNOLOGY BUDGET	TORRETAM000	M

500 20 records displayed Report Name: ABC

6.) ABOVE YOU WILL SEE A FILTER WITH SEVERAL OPTIONS. CLICKING ON "MY REPORTS" SHOWS ONLY REPORTS YOU HAVE CREATED OR CLONED AND SAVED.

CLICKING ON "ALL USERS' REPORTS" WILL SHOW YOU THE REPORTS THAT HAVE BEEN CLONED OR SAVED BY ALL OTHERS IN THE DISTRICT USING THIS MODULE.

YOU WILL USE ONE OF THESE TWO CHOICES.

Budgetary Data Mining - WFAM\RP\DM\DM - 27021 - 05.13.06.00.05 10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/famdmbrws000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining Favorites New Window My Print Queue

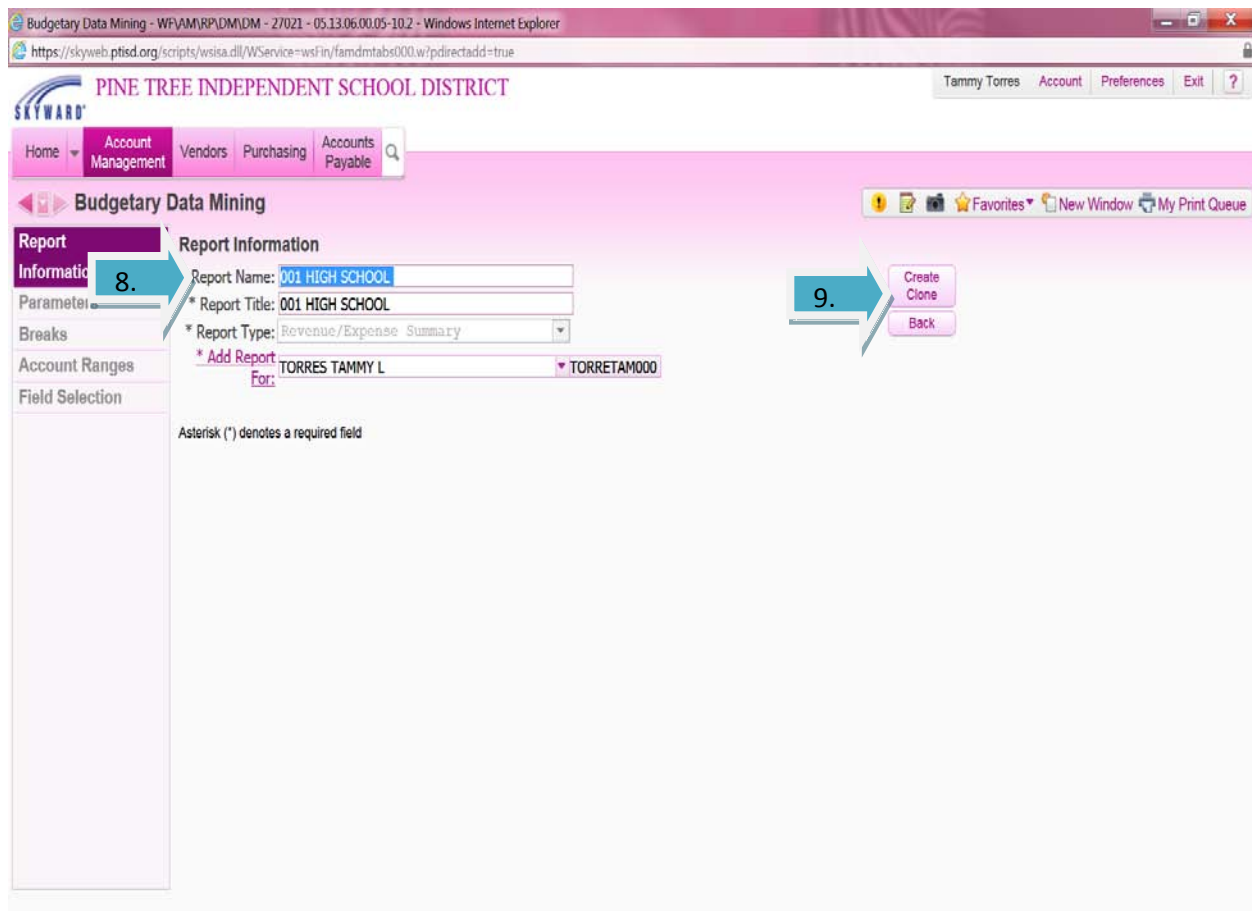
Views: Revenue and Expense Reports - Detail and Summary Filters: *All Users' Reports

Report Name	Report Title	Created By	Access
1 ▶ 001 HIGH SCHOOL	001 HIGH SCHOOL	ALLENROX000	M
2 ▶ 001 HIGH SCHOOL	001 HIGH SCHOOL	TORRETAM000	
3 ▶ 001 HIGH SCHOOL 2009.2010	001 HIGH SCHOOL 2009.2010	DOWNIJUD001	
4 ▶ 001 HS CAMPUS	001 HS CAMPUS ALL ACCOUNTS AVAILABLE	DOWNIJUD001	M
5 ▶ 003 EXCEL	003 EXCEL	FINANFIN000	M
6 ▶ 041 JUNIOR HIGH 2010.2011	041 JUNIOR HIGH 2010.2011	DOWNIJUD001	M
7 ▶ 199 ACADEC	199 ACADEC	ALLENROX000	M
8 ▶ 199 ACADEC	199 ACADEC	VESTACAT000	M
9 ▶ 199 ACTUAL REVENUE	199 ACTUAL REVENUE	SCOTTJOH000	M
10 ▶ 199 ART	199 ART	ALLENROX000	M
11 ▶ 199 ART	199 ART	VESTACAT000	M
12 ▶ 199 ART 2-27-13	199 ART 2-27-13	ALLENROX000	M
13 ▶ 199 ART 2-28-13	199 ART2-28-13	ALLENROX000	M
14 ▶ 199 ART 2013	199 ART 2013	ALLENROX000	M
15 ▶ 199 ART 6-20-13	199 ART 6-20-13	ALLENROX000	M
16 ▶ 199 BAND	199 BAND	ALLENROX000	M
17 ▶ 199 BAND	199 BAND	VESTACAT000	M
18 ▶ 199 BAND 2013	199 BAND 2013	ALLENROX000	M
19 ▶ 199 CHEERLEADER	199 CHEERLEADER	ALLENROX000	M
20 ▶ 199 CHEERLEADER	199 CHEERLEADER	VESTACAT000	M

500 499 records displayed Report Name: ABC

7.) OPTION #1 - CLONE A REPORT.

- MAKE SURE YOUR FILTER SAYS "ALL USER REPORTS".
- FIND THE REPORT YOU WANT TO CLONE IN THE LIST.
- CLICK ON THE CLONE BUTTON.



8.) HERE YOU MAY RENAME YOUR REPORT/REPORT TITLE.

9.) CLICK ON CREATE CLONE.

Budgetary Data Mining - WPAM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsfin/famdmtabs000.w/?pdirectadd=true

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining

Report Information

* Report Name: 001 HIGH SCHOOL

* Report Title: 001 HIGH SCHOOL

* Report Type: Revenue/Expense Summary

* Add Report For: TORRES TAMMY L TORRETAM000

Create Clone Back

10.

Asterisk (*) denotes a required field

THE NEXT FEW SCREENS WILL SHOW YOU THE OPTIONS YOU HAVE TO CUSTOMIZE YOUR REPORT.

10.) ABOVE YOU SEE PARAMETERS YOU MAY SET FOR YOUR REPORT. MAKE YOUR CHOICES THEN CLICK ON SAVE AND ADD BREAKS.

Budgetary Data Mining - WFLM\RP\DM\DM - 27021 - 05.13.06.00.05.10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/famdmntabs000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

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

FND T FC OBJ SO ORG F PI LOC
☒ ☒ ☒ ☒ ☒ ☒ ☒ ☐ ☐ ☐

Break Levels to include in processing
 FND Position 1
 FND Position 2
 FND Position 3
 T Position 1
 FC Position 1
 FC Position 2
 OBJ Position 1
 OBJ Position 2
 OBJ Position 3
 OBJ Position 4
 SO Position 1
 SO Position 2
 ORG Position 1
 ORG Position 2
 ORG Position 3

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

11. Save Breaks and Add Ranges Back

11.) MAKE YOUR CHOICE OF HOW YOU WANT THE ACCOUNT SEQUENCE. CLICK ON SAVE BREAKS AND ADD RANGES.

Budgetary Data Mining - WPA\MYRP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsa.dll/WSservice=wsFin/famdmintabs000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Budgetary Data Mining Favorites New Window My Print Queue

Report Information Parameters Breaks **Account Ranges** Field Selection

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

Account Ranges

Low High
 Category: 001 001 HS
 Group: ZZ-ZZ-ZZZZ
 Account Status: ☒ Active and Inactive ☐ Active ☐ Inactive

Operating Statement Accounts
☒ Expense ☐ Revenue
 Low Account: 161 * 00 0000 00 000 0 00 000
 High Account: 199 * 99 9999 ZZ 999 0 zz ZZZ

Dimension	Low	High
FUND:	161	199
TYPE:	*	*
FUNCTION:	00	99
OBJECT:	0000	9999
SUB-OBJECT:	00	ZZ
ORGANIZATN:	000	999
FISCAL YR:	0	0
PROGRM-INT:	00	zz
LOCAL:	000	ZZZ

Include Filters for Operating Statement Accts
 Add

12. Save Ranges and Add Fields Back

12.) CHOOSE ACCOUNT RANGES AND SAVE RANGES AND ADD FIELDS.

Budgetary Data Mining - WFLMVRP/DM/DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer

https://skyweb.ptisd.org/scripts/wsisd.dll/WService=wsFin/famdmntabs000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Budgetary Data Mining

Report Name: TEST

Report Title: TEST

Report Type: Revenue/Expense Summary

Field Selection

Fields to include in processing

Account Number

Account Level Description

FYTD Revised Budget

FYTD Debits

FYTD Credits

Encumbered Amount

FYTD Unencumbered Balance

Select Fields

Remove Field

Clone Field

Field Parameters

Description: Account Heading

Heading 1:

Heading 2: FND T FC OBJ SO ORG F PI

Length: 35

Display

Number

Description

Short Description

Report Width

Report Width: 156

Up Down

Asterisk (*) denotes a required field

13.) HERE IN FIELD SELECTION IS WHERE YOU CHOOSE WHAT YOU WANT TO SEE IN YOUR REPORT FIELDS. TO SEE YOUR CHOICES CLICK ON SELECT FIELDS.

14.) ONCE YOU HAVE SELECTED YOU WILL HIT SAVE AND BACK.

THE FOLLOWING SCREENSHOT SHOWS THE FIELD SELECTION CHOICES.

Select Fields - WF\AM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer

https://skyweb.ptisd.org/scripts/wsis.dll/WService=wsFin/famdmslct001.w?isPopup=true

Select Fields

Views: General Filters: *Skyward Default

	Select	M	Description
1	<input type="checkbox"/>		Account Active Status
2	<input checked="" type="checkbox"/>		Account Level Description
3	<input checked="" type="checkbox"/>		Account Number
4	<input type="checkbox"/>		Account Quick Key
5	<input type="checkbox"/>		Available Funds
6	<input type="checkbox"/>		BASE 13.14 (Budget Type)
7	<input type="checkbox"/>		Batch Activity
8	<input type="checkbox"/>		Bud Reqs (Budget Type)
9	<input type="checkbox"/>		Budget Carry Forward
10	<input type="checkbox"/>		Budget Requisitions - Approved
11	<input type="checkbox"/>		Budget Requisitions - Denied
12	<input type="checkbox"/>		Budget Requisitions - Pending
13	<input type="checkbox"/>		Budget Revisions
14	<input type="checkbox"/>		Budget Transfers
15	<input type="checkbox"/>		CAMP ACTIV (Budget Type)
16	<input type="checkbox"/>		Category
17	<input type="checkbox"/>		COMBINED (Budget Type)
18	<input type="checkbox"/>		Comment
19	<input type="checkbox"/>		CURRICULUM (Budget Type)
20	<input type="checkbox"/>		Edited Group
21	<input checked="" type="checkbox"/>		Encumbered Amount
22	<input type="checkbox"/>		Encumbrance Carry Forward
23	<input type="checkbox"/>		Encumbrance Summary Account
24	<input type="checkbox"/>		Fiscal Year Activity
25	<input type="checkbox"/>		Fiscal Year Credits

100 80 records displayed Code: ABC

150%

HERE YOU SEE THE FIELDS YOU HAVE TO CHOOSE FROM. CHECK THE BOX YOU WOULD LIKE TO ADD.

Budgetary Data Mining - W:\AM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/famdm/abs000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining ! ? Favorites New Window My Print Queue

Report Information Parameters Breaks Account Ranges **Field Selection**

Add Delete Clone Back

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

15. Print Excel

Field Selection Edit

Views: All Field Selections Filters: *Skyward Default

#	Field	Heading 1	Heading 2	Type
1	1 Account Number		FND T FC OBJ SO ORG F PI	
2	2 Account Level Description	Account Level	Description	
3	3 FYTD Revised Budget	<Y>	FYTD Revised Bdgt	Single
4	4 FYTD Debits	<Y>	FYTD Debits	Single
5	5 FYTD Credits	<Y>	FYTD Credits	Single
6	6 Encumbered Amount	Encumbered	Amount	Single
7	7 FYTD Unencumbered Balance	<Y> FYTD	Unencumbered Bal	Single

20 7 records displayed

15.) NOW YOU ARE READY TO PRINT. CLICK ON THE PRINT BUTTON.

Runtime Parameters - WF\AM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Intern...

https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/famdmmedit006.w?isPopup=true

Runtime Parameters

16. Reporting Month: Entered Month

Select Month: January

Year: 2013

☐ Print Title Page

☐ Print Greenbar

18. Print

Back

Runtime Report Setup

How do you want to change runtime setup?

17. ☒ Use current setup - no change

☐ Change setup for this run only - do not save

☐ Change setup for this run and save setup

Report Name: TEST

Parameters

Breaks

Account Ranges

Field Selection

150%

16.) REPORTING MONTH, SELECT MONTH, SELECT YEAR.

17.) CHOOSE THE RUNTIME REPORT SETUP. DO YOU WANT TO USE THE CURRENT CRITERIA YOU HAVE SET? DO YOU WANT TO CHANGE THEM FOR THIS RUN ONLY? DO YOU WANT TO CHANGE NOW AND SAVE?

18.) CLICK PRINT.

Budgetary Data Mining - WFAAM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/famdmtdbs000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining Favorites New Window My Print Queue

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 Filter

#	Field	Heading 2	Type
1	1 Account Number	FND T FC OBJ SO ORG F PI	
2	2 Account Level Description	Description	
3	3 FYTD Revised Budget	FYTD Revised Bdgt	Single
4	4 FYTD Debits	FYTD Debits	Single
5	5 FYTD Credits	FYTD Credits	Single
6	6 Encumbered Amount	Amount	Single
7	7 FYTD Unencumbered Balance	Unencumbered Bal	Single

20 7 records displayed

Processing Request

3frbud12.p 05.13.06.00.05-10.2-010146
 TEST (Date: 8/2013)
 ACCOUNT: 19955263990000Z
 Run Time: 00:00:08

My Print Queue Back

HERE IS WHAT YOU SHOULD SEE...

Budgetary Data Mining - WPJAM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/famdmtdm000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining

Report Information Parameters Breaks Account Ranges Field Selection

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

Add Delete Clone Back

Print
 Excel

Request Complete
 R/E Sum Rpt: TEST 08/2013 has finished processing.

Field Selection

Views: All Field Selections filter

#	Field	Heading 2	Type
1	Account Number	FND T FC OBJ SO ORG F PI	
2	Account Level	Description	
3	FYTD Revised Budget	FYTD Revised Bdg	Single
4	FYTD Debits	FYTD Debits	Single
5	FYTD Credits	FYTD Credits	Single
6	Encumbered Amount	Amount	Single
7	FYTD Unencumbered Balance	Unencumbered Bal	Single

20 7 records displayed

View Report Back

javascript:if (cbs('printMsgBtn1')) {vQPSetup.cancelCheckQueue(); closeMessage(false, 'dPrintMessage'); window.open...

19.) CLICK ON VIEW REPORT.

[illegible]

HERE IS AN EXAMPLE OF WHAT YOU WILL SEE. REMEMBER IT ALL DEPENDS ON WHAT CRITERIA YOU PUT IN FOR YOUR REPORT.

*****NOTE- YOUR CLONED REPORT WILL BE SAVED UNDER YOUR "MY REPORTS" FILTER TAB.**

Budgetary Data Mining - WFAM\RPDM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/famdmtdm000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT
Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining

Report Information Parameters Breaks Account Ranges Field Selection

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

Print
Excel

20.

Field Selection

Views: All Field Selections Filters: *Skyward Default

#	Field	Heading 1	Heading 2	Type
1	1 Account Number		FND T FC OBJ SO ORG F PI	
2	2 Account Level Description	Account Level	Description	
3	3 FYTD Revised Budget	<Y>	FYTD Revised Bdgt	Single
4	4 FYTD Debits	<Y>	FYTD Debits	Single
5	5 FYTD Credits	<Y>	FYTD Credits	Single
6	6 Encumbered Amount	Encumbered	Amount	Single
7	7 FYTD Unencumbered Balance	<Y> FYTD	Unencumbered Bal	Single

20 7 records displayed

20.)YOU ALSO HAVE THE OPTION TO EXPORT TO EXCEL BY CLICKING THE EXCEL BUTTON.

Runtime Parameters - WF\AM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Intern...

https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/famdmmedit006.w?isPopup=true

Runtime Parameters

21. →

Runtime Report Parameters

Report Name: TEST

Reporting Month: Entered Month ▼

Select Month: August ▼

Year: 2013 ▼

☐ Print Title Page

☐ Print Greenbar

Excel

Back

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: TEST

Parameters

Breaks

Account Ranges

Field Selection

150%

21.) FOLLOW THE SAME PROCEDURES AS WHEN YOU HIT PRINT, BUT THIS TIME HIT EXCEL INSTEAD.

Budgetary Data Mining - WFLAM\RPLDM\DM - 27021 - 05.13.06.00.05 10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/famdmmtabs000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining Favorites New Window My Print Queue

Report Information Parameters Breaks Account Ranges **Field Selection**

Report Name: TEST Add Delete Clone Back
 Report Title: TEST Print
 Report Type: Revenue/Expense Summary Excel

Field Selection

Views: All Field Selections Filter

#	Field	Heading 2	Type
1	1 Account Number	FND T FC OBJ SO ORG F PI	
2	2 Account Level Description	Description	
3	3 FYTD Revised Budget	FYTD Revised Bdgt	Single
4	4 FYTD Debits	FYTD Debits	Single
5	5 FYTD Credits	FYTD Credits	Single
6	6 Encumbered Amount	Amount	Single
7	7 FYTD Unencumbered Balance	Unencumbered Bal	Single

20 7 records displayed

Processing Request

TEST (Date: 8/2013)

ACCT NUMBER: 199 E 11 6399 11 041 0 99 000

Run Time: 00:00:01

My Print Queue Back

THIS IS WHAT YOU WILL SEE...

Budgetary Data Mining - W:\AM\RP\DM\DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/famdmfmlabs000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining

Report Information Parameters Breaks Account Ranges Field Selection

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

Add Delete Clone Back

Print
 Excel

Request Complete
 R/E Sum Rpt: TEST 08/2013 has finished processing.

Edit

Views: All Field Selections Filter

#	Field	Heading 2	Type
1	1 Account Number	FND T FC OBJ SO ORG F PI	
2	2 Account Level	Description	
3	3 FYTD Revised Budget	FYTD Revised Bdg	Single
4	4 FYTD Debits	FYTD Debits	Single
5	5 FYTD Credits	FYTD Credits	Single
6	6 Encumbered Amount	Amount	Single
7	7 FYTD Unencumbered Balance	Unencumbered Bal	Single

20 7 records displayed

22.) CLICK ON VIEW REPORT.

SKR900660I9H8L7M812684 - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

A1																		
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
1	Account Level	2013-14	2013-14	2013-14	Encumber	2013-14 FYTD												
2	FND T FC (Description	FYTD Rev	FYTD Debi	FYTD Cred	Amount	Unencumbered Bal												
3	161 E 36 6 SHARED DISTRICT E	2,662.00				2,662.00												
4	161 E 36 6499 02 999 - - - -	2,662.00				2,662.00												
5	161 E 36 6499 02 99 - - - -	2,662.00				2,662.00												
6	161 E 36 6499 02 9 - - - -	2,662.00				2,662.00												
7	161 E 36 6499 02 - - - -	2,662.00				2,662.00												
8	161 E 36 6499 0 - - - -	2,662.00				2,662.00												
9	161 E 36 6499 - - - -	2,662.00				2,662.00												
10	161 E 36 649 - - - -	2,662.00				2,662.00												
11	161 E 36 64 - - - -	2,662.00				2,662.00												
12	161 E 36 6 - - - -	2,662.00				2,662.00												
13	161 E 36 - - - -	2,662.00				2,662.00												
14	161 E 3 - - - -	2,662.00				2,662.00												
15	161 E - - - -	2,662.00				2,662.00												
16	161 - - - -	2,662.00				2,662.00												
17	163 E 11 6 NOVA NET SUPPORT																	
18	163 E 11 6249 97 001 - - - -																	
19	163 E 11 6249 97 00 - - - -																	
20	163 E 11 6249 97 0 - - - -																	
21	163 E 11 6249 97 - - - -																	
22	163 E 11 6249 9 - - - -																	
23	163 E 11 6249 - - - -																	
24	163 E 11 624 - - - -																	
25	163 E 11 62 - - - -																	

Ready

100%

THIS IS WHAT YOU WILL SEE ACCORDING TO YOUR CRITERIA.

Budgetary Data Mining - WFAAM/RP/DM/DM - 27021 - 05.13.06.00.05-10.2 - Windows Internet Explorer
 https://skyweb.ptisd.org/scripts/wfsa.dll/WService=wsFin/famdmbrws000.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Budgetary Data Mining

Views: Revenue and Expense Reports - Detail and Summary Filters: 'All Users' Reports 23. Add Edit Delete Clone Print Excel Schedule This Report

Report Name	Report Title	Created By	Access
1 ▸ 001 HIGH SCHOOL	001 HIGH SCHOOL	ALLENROX000	M
2 ▸ 001 HIGH SCHOOL	001 HIGH SCHOOL	TORRETAM000	M
3 ▸ 001 HIGH SCHOOL 2009.2010	001 HIGH SCHOOL 2009.2010	DOWNIJUD001	M
4 ▸ 001 HS CAMPUS	001 HS CAMPUS ALL ACCOUNTS AVAILABLE	DOWNIJUD001	M
5 ▸ 003 EXCEL	003 EXCEL	FINANFIN000	M
6 ▸ 041 JUNIOR HIGH 2010.2011	041 JUNIOR HIGH 2010.2011	DOWNIJUD001	M
7 ▸ 199 ACADEC	199 ACADEC	ALLENROX000	M
8 ▸ 199 ACADEC	199 ACADEC	VESTACAT000	M
9 ▸ 199 ACTUAL REVENUE	199 ACTUAL REVENUE	SCOTTJOH000	M
10 ▸ 199 ART	199 ART	ALLENROX000	M
11 ▸ 199 ART	199 ART	VESTACAT000	M
12 ▸ 199 ART 2-27-13	199 ART 2-27-13	ALLENROX000	M
13 ▸ 199 ART 2-28-13	199 ART2-28-13	ALLENROX000	M
14 ▸ 199 ART 2013	199 ART 2013	ALLENROX000	M
15 ▸ 199 ART 6-20-13	199 ART 6-20-13	ALLENROX000	M
16 ▸ 199 BAND	199 BAND	ALLENROX000	M
17 ▸ 199 BAND	199 BAND	VESTACAT000	M
18 ▸ 199 BAND 2013	199 BAND 2013	ALLENROX000	M
19 ▸ 199 CHEERLEADER	199 CHEERLEADER	ALLENROX000	M
20 ▸ 199 CHEERLEADER	199 CHEERLEADER	VESTACAT000	M

500 500 records displayed Report Name: ABC

23.) OPTION #2 ADD A REPORT

TO ADD A REPORT YOU WOULD CLICK ON THE ADD BUTTON THEN WALK THROUGH THE SAME STEPS PREVIOUSLY SHOWN. IT WILL BE SAVE TO "MY REPORTS" UNDER FILTERS.

THIS NOW CONCLUDES THE TUTORIAL ON BUDGETARY DATA MINING.