

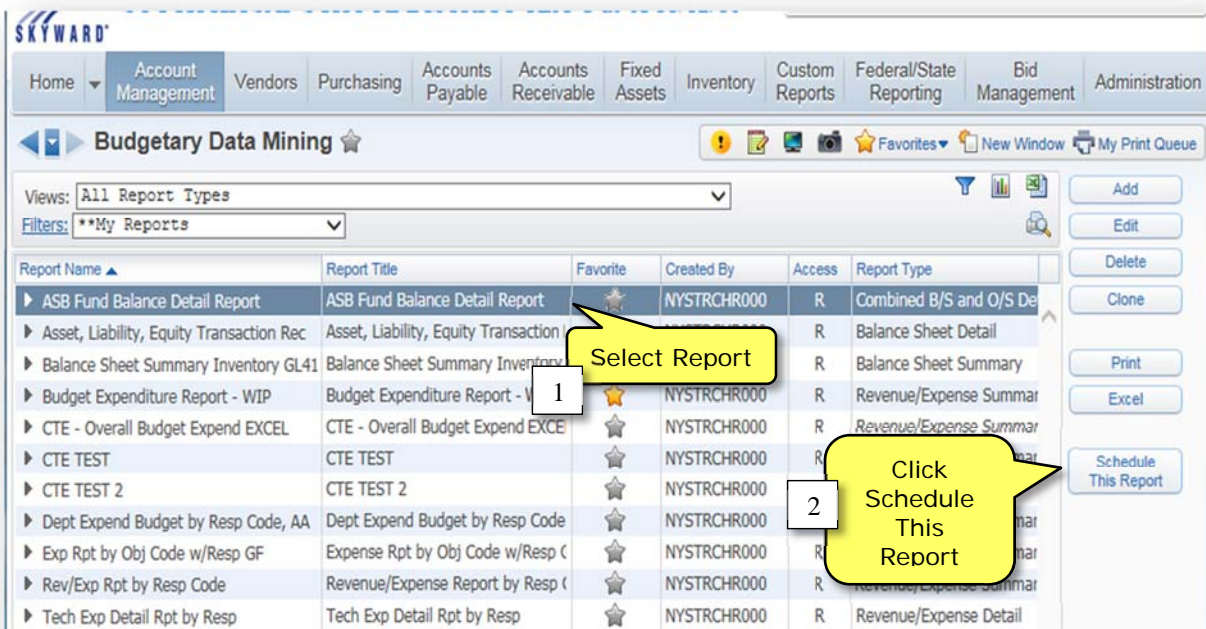
## CROSS PRODUCT – TASKS FOR FINANCIAL DATA MINING REPORTS

Tasks can be set up within the Skyward system which allows you to schedule reports to run on a re-occurring basis and notify you by email once the task is complete.

For more information, please see the WSIPC Guide to Skyward's School Management System

To set up a re-occurring report to run automatically go to Budgetary Data Mining WF/AM/RP/DM.

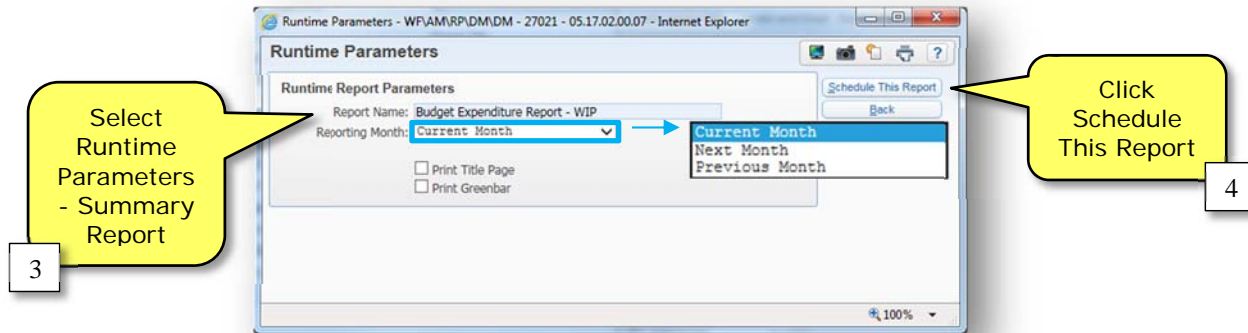
1. Select the report you wish to set up as re-occurring. (Take note of the Report Type, and whether it is a Summary or Detail Report).
2. Click **Schedule This Report**.



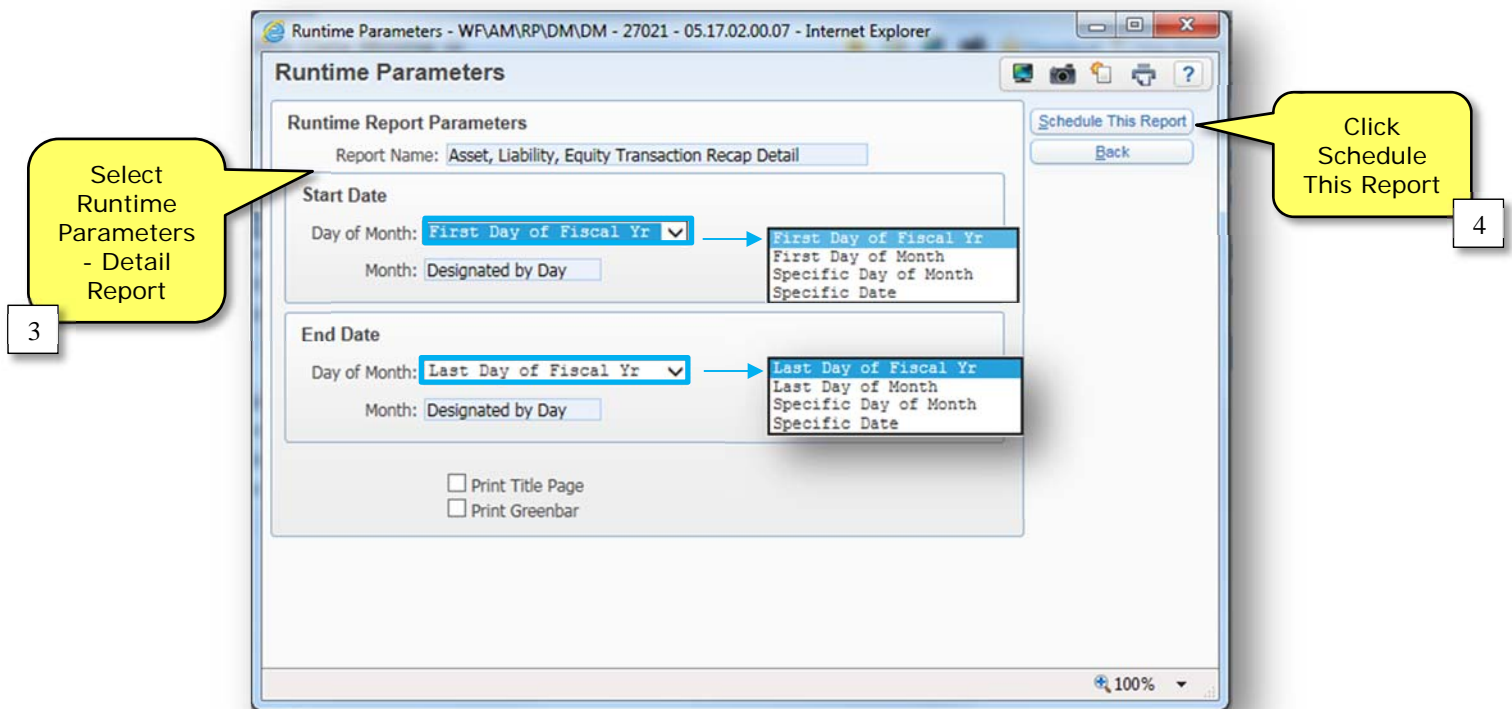
The screenshot shows the Skyward application interface for Budgetary Data Mining. The top navigation bar includes links like Home, Account Management, Vendors, Purchasing, etc. The main area displays a table of reports with columns: Report Name, Report Title, Favorite, Created By, Access, and Report Type. The first report, 'ASB Fund Balance Detail Report', is highlighted. A yellow callout with the number '1' points to this row. On the right side of the interface, there are several buttons: Add, Edit, Delete, Clone, Print, Excel, and Schedule This Report. A yellow callout with the number '2' points to the 'Schedule This Report' button.

Report Name	Report Title	Favorite	Created By	Access	Report Type
ASB Fund Balance Detail Report	ASB Fund Balance Detail Report	★	NYSTRCHR000	R	Combined B/S and O/S De
Asset, Liability, Equity Transaction Rec	Asset, Liability, Equity Transaction			R	Balance Sheet Detail
Balance Sheet Summary Inventory GL41	Balance Sheet Summary Inventory			R	Balance Sheet Summary
Budget Expenditure Report - WIP	Budget Expenditure Report - WIP	★	NYSTRCHR000	R	Revenue/Expense Summar
CTE - Overall Budget Expend EXCEL	CTE - Overall Budget Expend EXCE	★	NYSTRCHR000	R	Revenue/Expense Summar
CTE TEST	CTE TEST	★	NYSTRCHR000	R	
CTE TEST 2	CTE TEST 2	★	NYSTRCHR000	R	
Dept Expend Budget by Resp Code, AA	Dept Expend Budget by Resp Code	★	NYSTRCHR000	R	
Exp Rpt by Obj Code w/Resp GF	Expense Rpt by Obj Code w/Resp C	★	NYSTRCHR000	R	
Rev/Exp Rpt by Resp Code	Revenue/Expense Report by Resp C	★	NYSTRCHR000	R	
Tech Exp Detail Rpt by Resp	Tech Exp Detail Rpt by Resp	★	NYSTRCHR000	R	Revenue/Expense Detail

3. Select the Runtime Parameters for a Summary or a Detail Report as follows:
- For Summary Report Types select the **Reporting Month** you want to see displayed.



- For Detail Report Types select a **Start Date** and **End Date**.



4. Click **Schedule This Report**.

Complete the Task Information section of the Scheduled Task Maintenance screen.

5. Click the radio button to select the appropriate **Task Status**.
6. Type a **Task Description** (if you want to change the default description).
7. Select a **Start** and **End Date** for the task to run.
8. Enter a **Start Time** between 4:30 to 10:30 PM to avoid conflicts with nightly server maintenance.
9. Check the **Day(s) of the week** the report will run (see definitions and examples on the next page).
10. Check the boxes of the **Month(s) of the year** in which you want the task to run.

The screenshot shows the 'Scheduled Task Maintenance' window. It contains the following sections and callouts:

- Task Information**:
  - Callout 5: Points to the 'Task Status' section with radio buttons for 'Active' (selected) and 'Inactive'.
  - Callout 6: Points to the '\* Task Description' field, which contains 'Invoice Listing - Default'.
  - Callout 7: Points to the '\* Start Time' field, which contains '02:00 AM'.
  - Callout 8: Points to the 'Day(s) of the week' section, which has checkboxes for Mon (checked), Tue, Wed, Thur, Fri, Sat, and Sun.
  - Callout 9: Points to the 'Month(s) of the year' section, which has checkboxes for all months from January to December, all of which are checked.
- Parameters**:
  - A checkbox 'Keep parameters synchronized with associated template' is checked.
  - \* Start Date: 04/19/2017 (Wednesday)
  - \* End Date: 12/31/2999 (Tuesday)
- Specific day of the month (1-31)**: A dropdown menu is open, showing options: 'Occurrence(s) of the day in the month (1-5)', 'Specific day of the month (1-31)' (highlighted), and 'Week(s) of the month (1-6)'. Below the dropdown, 'Specific Day (1-31):' is set to 15.

Buttons for 'Save' and 'Back' are located in the top right corner.

## Days of the week definitions and examples

Occurrence(s) of the day in the month (1-5)
Specific day of the month (1-31)
Week(s) of the month (1-6)

- **Occurrence(s) of the day in the month** (Recommended). Select, for example, the first Monday, or the Third Wednesday, etc.

Day(s) of the week  
☒ Mon ☐ Tue ☐ Wed ☐ Thur ☐ Fri ☐ Sat ☐ Sun

Occurrence(s) of the day in the month (1-5)  
☒ First ☐ Second ☐ Third ☐ Fourth ☐ Fifth ☐ Sixth

Month(s) of the year  
☒ January ☒ February ☒ March ☒ April ☒ May ☒ June  
☒ July ☒ August ☒ September ☒ October ☒ November ☒ December

- **Specific day of the month**. In this example, keep in mind that if you select a specific day, (the 30<sup>th</sup>) and don't check Sat and Sun, the task will only print if the 30<sup>th</sup> lands on M-F. A better set up would be to check all the days of the week so that the task would run on any day in which the 30<sup>th</sup> falls.

Day(s) of the week  
☒ Mon ☒ Tue ☒ Wed ☒ Thur ☒ Fri ☐ Sat ☐ Sun

Specific day of the month (1-31)  
Specific Day (1-31): 30

Month(s) of the year  
☒ January ☒ February ☒ March ☒ April ☒ May ☒ June  
☒ July ☒ August ☒ September ☒ October ☒ November ☒ December

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

- **Week(s) of the month**. For this option you select the day of the week (M-Su), and the week of the month (first – sixth) you want the task to run. Keep in mind the task may not run if Monday was selected for the first week of the month and that particular month doesn't have a Monday on week one because the first day of the month starts on Wed.

Day(s) of the week  
☒ Mon ☐ Tue ☐ Wed ☐ Thur ☐ Fri ☐ Sat ☐ Sun

Week(s) of the month (1-6)  
☒ First ☐ Second ☐ Third ☐ Fourth ☐ Fifth ☐ Sixth

Month(s) of the year  
☒ January ☒ February ☒ March ☒ April ☒ May ☒ June  
☒ July ☒ August ☒ September ☒ October ☒ November ☒ December

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

11. Type an Email address of the employee who should get the results of the task. (optional)
  - Recipient will receive the full report, as it was run, regardless of their account clearance. Users must schedule their own tasks for the system to honor their account clearance.
  - Send an email to multiple employees using ; (with no spaces) between the names.
12. Check the box **Add to Notifications widget in SkyPort when completed** if you wish to add a notification to the Skyward desktop home page. (optional)
13. Search for the users to receive the notification in **User Selection**. (optional)
14. Click **Add** to include the selected name on the list.

The screenshot shows the 'Task Manager' window in Skyward. It is divided into three main sections: 'Additional Export Options', 'Task Manager', and 'FTP - Upload the results file to the selected FTP Connection'.

- Additional Export Options:** Contains a 'Spreadsheet Format' dropdown set to 'Microsoft Office 2007+ (x1)' and a help icon. Below it is the 'Email Results To:' field, which is highlighted with a yellow callout box labeled '10' and 'Type Email'. The field contains the email address 'Nystrom@skitsap.wednet.edu'. Below this is the 'Export Location:' field with a help icon.
- Task Manager:** Contains a checkbox labeled 'Add to Notifications widget in SkyPort when completed.' which is checked. Below this is the 'User Selection:' dropdown menu, highlighted with a yellow callout box labeled '12' and 'Search User Name'. To the right of the dropdown are 'Add', 'Remove', and 'Remove All' buttons. Below the dropdown is a list of 'Selected Names' with two entries: 'NYSTRCHR000 - Nystrom Christine E' and 'ZARIFSTE000 - Zarifes Stephanie Elaine'. A yellow callout box labeled '11' and 'Click Add Notifications' points to the 'Add' button. Another yellow callout box labeled '13' and 'Click Add' points to the 'Add' button.
- FTP - Upload the results file to the selected FTP Connection:** Contains an 'FTP Connection:' field and a 'Clear' button.