FinSight Time Period Generator: GitHub Actions Automation Walkthrough

# Overview

This document provides a detailed walkthrough of how the FinSight time period generator was configured to run automatically using GitHub Actions. It includes all major setup steps, descriptions, and relevant Git commands.

# 1. Project Structure and Setup

The FinSight time period generator script was placed in the repository under:  
automation/finsight-time-periods/  
Make sure all files including .env (excluded via .gitignore) and dependencies (documented in requirements.txt) are in the correct folder.

# 2. Git Configuration

* git init

Initializes a new Git repository in the current directory.

* git remote add origin <url>

Adds a remote repository named 'origin' pointing to your GitHub URL.

* git add .

Stages all files in the current directory for the next commit.

* git commit -m 'message'

Commits the staged files with a descriptive message.

* git branch -M main

Renames the current branch to 'main'.

* git push -u origin main

Pushes your committed changes to GitHub on the 'main' branch and sets upstream tracking.

* git pull origin main

Fetches and merges the latest code from GitHub’s 'main' branch.

# 3. GitHub Actions Setup

To run the automation weekly, a GitHub Actions workflow file was created at:  
.github/workflows/finsight-timeperiods.yml

Key contents of the workflow:

- Uses 'schedule' trigger to run every week (e.g., Sunday at midnight UTC).

- Checks out the repo using actions/checkout.

- Sets up Python using actions/setup-python.

- Installs dependencies listed in requirements.txt.

- Runs the automation script generate\_time\_periods.py

# 4. Verifying & Debugging

To verify the action is working:  
- Navigate to the 'Actions' tab in your GitHub repository.  
- Check the workflow run history and logs.  
- Confirm that new time periods are created in Notion as expected.

# 5. Additional Notes

Ensure the NOTION\_TOKEN secret is configured in GitHub repository settings under 'Secrets and variables' > 'Actions'.  
Avoid committing sensitive info like API tokens or .env files.