



Texas Skyward User Group Conference

# Employee Access – Empowering District Employees

Lois Ann King



# Employee Access



Come see and learn how this powerful module can assist your Human Resource Officers

- We will review the various Setup Options
- We will demonstrate navigating the system from the Employee's perspective.

## Product Setup, Employee Access, Configuration

Skyward School District

Suzanne Kingreyscr Account Preferences Exit

Home Skyward System Data Student Human Financial Employee Task  
 Contact Access Administration Administration Management Resources Management Access Manager

Employee Access

By Path Search By Description

EM Product Setup Employee Access - EM

Employee Access - EM Configuration - CF

**Configuration - CF Items**

Options	Affects Entire District	Last Run Date	Last Run By
General Setup - SE	✓	10/14/2015	connorb
Time Off Setup - TO	✓	10/20/2015	loisk
Payroll Setup - PS	✓	08/23/2013	ADMIN4
Check Estimator - CE	✓	09/04/2015	loisk
Request Change Setup - RC	✓	08/20/2014	ms
Time Off Date Range Entry Setup - TD	✓	08/27/2014	shawna
Modify HR Calendar Events - MD	✓	08/27/2014	shawna

Run

## General Setup Options

- **Menu Items to Display**

**General Setup**

**Menu Items to Display in Employee Access**

<input checked="" type="checkbox"/> Display Calendar	<input type="checkbox"/> Display Employee Review
<input checked="" type="checkbox"/> Display Professional Development	<input checked="" type="checkbox"/> Display Expense Reimbursement
<input checked="" type="checkbox"/> Display FastTrack	<input type="checkbox"/> Display Online Open Enrollment
<input type="checkbox"/> Restrict Employees: <a href="#">Selection Parameters</a>	
<input type="radio"/> Do not display FastTrack tab for restricted employees. <input type="radio"/> Display FastTrack tab but only show external postings.	
<input type="checkbox"/> Display Work Requests	

- **Tabs Displayed in Employee Access**

### Tabs to Display on Personal Information Screen

<input checked="" type="checkbox"/> Display Personnel	<input checked="" type="checkbox"/> Display Org Chart: <b>TIME OFF ORG CHART</b>
<input type="checkbox"/> Display Insurance	<input checked="" type="checkbox"/> Display Custom Forms
<input checked="" type="checkbox"/> Display Sub Transactions	<input checked="" type="checkbox"/> Display Report Directory
<input checked="" type="checkbox"/> Display Food Service	<input checked="" type="checkbox"/> Display Report Options
<input checked="" type="checkbox"/> Display Emergency Contacts	<input type="checkbox"/> Display Attachments
	<input checked="" type="checkbox"/> Display Employee Letters
<input checked="" type="checkbox"/> Display AP Payments	
Bank to exclude: <input type="text"/>	
-----AP Payment types to display-----	
<input checked="" type="checkbox"/> R = Regular, <input checked="" type="checkbox"/> H = Hold, <input checked="" type="checkbox"/> S = Single, <input checked="" type="checkbox"/> P = Pay, <input checked="" type="checkbox"/> C = Continuous Void	
<input checked="" type="checkbox"/> Manual <input checked="" type="checkbox"/> Void <input type="checkbox"/> Wire Transfer <input checked="" type="checkbox"/> AP ACH	

## Time Off Setup Options

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### Time Off Setup

- Display Options
- Request Options
- Approval Options
- Approval Rules
- Substitute Options
- Cascading Groups

#### Display Options

- Display Time Off
- Display Group 9 Time Off

## Payroll Setup Options

### Payroll Setup

#### Employee Access Payroll Setup

Save

Back

#### Available Payroll Display Options

- Mask Bank Account Number
  - Display Check Estimator
  - Display Calendar Year to Date Information
  - Display Fiscal Year to Date Information
  - Display Payroll History Report
  - Display Direct Deposit Information
  - Display W2 Information
  - Display W4 Information
  - Display 1095 Information
  - Display Flex Information
    - Allow Employee to Print Employee Flex Plan Summary ?
  - Display Check History
    - Suppress Checks From Displaying Until Date of Check
- Payroll check types to display-----
- Accounting Adjustments     Manual     Manual Void
  - Payroll Payables             Prior         Quick Void
  - Regular

## Check Estimator

### Check Estimator

#### Check Estimator Options




Views: **General** Filters: **\*Skyward Default**



Update

Code ▲	Description	Active	Group	Group Type	Accrual Account	Long Description
DTC	TRS INS CT	Y	RET	TRS Care	163 L 00 2155 02 000 0 00 000	TRS INS. CONTRI ▲
OTRS	TRS RET TX	Y	RET	Retirement	163 L 00 2155 01 000 0 00 000	TRS-RETIREMENT

## Request Change Setup

### Request Change Setup

#### Employee Access Demographic Information

Allow Employees to modify Demographic Information

Set All Fields to:  Auto-Approve  Approval Needed  Read-Only  Hide

Former Name:  Auto-Approve  Approval Needed  Read-Only  Hide

Spouse Name:  Auto-Approve  Approval Needed  Read-Only  Hide

Phone 1:  Auto-Approve  Approval Needed  Read-Only  Hide

Phone 2:  Auto-Approve  Approval Needed  Read-Only  Hide

Phone 3:  Auto-Approve  Approval Needed  Read-Only  Hide

Emails:  Auto-Approve  Approval Needed  Read-Only  Hide

Race/Ethnicity:  Auto-Approve  Approval Needed  Read-Only  Hide

Primary and Mailing Address:  Auto-Approve  Approval Needed  Read-Only  Hide

Direct Deposit:  Auto-Approve  Approval Needed  Read-Only  Hide

Emergency Contacts:  Auto-Approve  Approval Needed  Read-Only  Hide

#### Confidentiality Flags

Primary and Mailing Addresses:  Auto-Approve  Approval Needed  Read-Only  Hide

Former Name:  Auto-Approve  Approval Needed  Read-Only  Hide

Spouse's Name:  Auto-Approve  Approval Needed  Read-Only  Hide

Phone 1:  Auto-Approve  Approval Needed  Read-Only  Hide

Phone 2:  Auto-Approve  Approval Needed  Read-Only  Hide

Phone 3:  Auto-Approve  Approval Needed  Read-Only  Hide





## Modify HR Calendar Events

Update HR Calendar Events

Views: General Filters: \*Skyward Default









Date ▲	Type	Description
08/28/2014	Information	PAYDAY

Add  
Edit  
Delete  
Clone  
Back



## Navigating Employee Access

Home | Employee Information | Time Off | **True Time** | FastTrack Open Positions | FastTrack Screener | Employee Review | Expense Reimbursement






**True Time**

- Quick Entry  
- My History 
- Employee Locator  
- My Setup 
- Data Mining 
- Reports 






**My Time Sheets**

- Unsubmitted 
- History 

**Supervisor Access**






- My Employees True Time 
- My Employees Totals by Status 
- My Employees Weekly Averages 
- Schedule Tracker 
- Max Hours 

**My Employees Time Sheets**









- Unsubmitted  
- Unapproved  
- History 

Home | Employee Information | Time Off | **True Time** | FastTrack Open Positions | Expense Reimbursement




**Employee Information**


- Personal Information 
- Calendar 
- Modify HR Calendar Events 
- Accounts Payable Payments 
- Online Forms 

**Payroll**

- Check History 
- Check Estimator 
- Calendar Year-to-Date 
- Fiscal Year-to-Date 
- Direct Deposit Information 
- W2 Information 
- W4 Information 
- 1095 Forms 

**Professional Development**


- Requests Pre-Approval 
- Requests Waiting Completion 
- History 

**Favorites** 


No favorites available.

**Budget Transfers Awaiting My Approval**

Not available when logged into the Employee Access Area

**District News** 

No news to display

**Web Favorites** 

Add links to your favorite sites on the web.

[Add Web Favorite](#)

**AP Invoices Awaiting My Approval**

Not available when logged into the Employee Access Area

## Time Off Requests

My Time Off Requests ☆

Views: General ▾ Filters: \*Skyward Default ▾

Date ▾	Time	Amount	Type	Status	Year	Time Off Code	Reason	Description	A
▶ 12/30/2016 Fri	8:00 am	8h 00m	Used	Approved	Current	PTO - Paid Time Off	Personal Day	Vacation	
▶ 12/27/2016 Tue	8:00 am	8h 00m	Used	Approved	Current	PTO - Paid Time Off	Personal Day	Vacation	
▶ 12/23/2016 Fri	8:00 am	4h 00m	Used	Approved	Current	Floating Holiday	Personal Day	Vacation	
▶ 12/20/2016 Tue	8:00 am	8h 00m	Used	Approved	Current	PTO - Paid Time Off	Personal Day	Vacation	
▶ 12/19/2016 Mon	8:00 am	8h 00m	Used	Approved	Current	PTO - Paid Time Off	Personal Day	Vacation	
▶ 08/30/2016 Tue	8:00 am	8h 00m	Used	Approved	Current	PTO - Paid Time Off	Personal Day	Vacation	
▶ 08/29/2016 Mon	8:00 am	8h 00m	Used	Approved	Current	PTO - Paid Time Off	Personal Day	Vacation	
▶ 08/26/2016 Fri	8:00 am	8h 00m	Used	Approved	Current	PTO - Paid Time Off	Personal Day	Vacation	
▶ 08/25/2016 Thu	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation	
▶ 08/24/2016 Wed	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation	
▶ 08/23/2016 Tue	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation	
▶ 07/21/2016 Thu	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation	
▶ 07/20/2016 Wed	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation	
▶ 07/19/2016 Tue	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation	
▶ 07/18/2016 Mon	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation	
▶ 07/18/2016 Mon	8:00 am	-8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Giving day back	
▶ 07/01/2016 Fri	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation with Grandchildren	
▶ 06/30/2016 Thu	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation with Grandchildren	
▶ 06/29/2016 Wed	8:00 am	8h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation with Grandchildren	
▶ 06/29/2016 Wed	8:00 am	4h 00m	Used	Approved	Prior	PTO - Paid Time Off	Personal Day	Vacation with Grandchildren	





## Expense Reimbursement

Skyward ISD

Anthony AaOconnerscr Account Preferences Exit ?

Home Employee Information Time Off True Time FastTrack Open Positions FastTrack Screener Work Requests Expense Reimbursement Online Open Enrollment

Activity (773)

Views: General Filters: \*Skyward Default

Date Entered	Req Sts	Expenses From	Expenses To	Reimburs Amount	Direct Bill Amount	Total Amount	Purpose	Last Name
04/18/2016 Mon	HIS	04/15/2016	04/15/2016	95.00	0.00	95.00	Conference	KOLLMANSC
12/18/2015 Fri	HIS	10/05/2015	10/07/2015	857.50	0.00	857.50	Skyward User Group	BRIDGESSCR
12/17/2015 Thu	HIS	12/07/2015	12/10/2015	247.50	300.00	547.50	Conference	BRIDGESSCR
11/25/2015 Wed	HIS	11/25/2015	11/25/2015	27.50	0.00	27.50	test for accounting	DOE
05/13/2013 Mon	HIS	05/06/2013	05/10/2013	960.00	0.00	960.00	REIMBURSEMENT FOR TRIP TO AUS	ABELSCR
05/08/2013 Wed	HIS	05/01/2013	05/03/2013	20.00	0.00	20.00	TEACHERS CONFERENCE IN AUSTIN	AA'OCONNERSC
04/24/2012 Tue	HIS	04/24/2012	04/24/2012	75.00	0.00	75.00	TRAVEL REIMBURSEMENT FOR JOB F	ABELSCR
03/27/2012 Tue	HIS	03/27/2012	03/27/2012	25.50	0.00	25.50	Miscellaneous travel reimbursement	CRUDUPSCR
09/19/2011 Mon	HIS	09/19/2011	09/19/2011	75.00	0.00	75.00	Reimbursement test	ABELSCR
08/16/2011 Tue	HIS	08/16/2011	08/16/2011	56.00	0.00	56.00	Reimburse for field trip to museum	CRUDUPSCR
05/20/2010 Thu	HIS	04/26/2010	04/30/2010	178.50	375.00	553.50	Travel for staff development	CRUDUPSCR
04/21/2010 Wed	HIS	04/13/2010	04/14/2010	261.25	0.00	261.25	Travel reimbursement	ABELSCR







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**THANK YOU FOR ATTENDING!**

