

TX – Program # (6I) – Skyward Catalog # – Data Mining + Labels and Mail Merge

What will be covered:

This session will address the following topics . . .

- Organizing Data Mining Reports
 - Developing reports that can be used by campus staff at any campus
 - Building filters to organize groups of similar reports to make them easier to find
- Considerations for more involved reporting
 - Creating User-Defined Fields (UDF) to add information to reports displayed in Skyward Family Access
 - Using the field areas to make sure that only the students you want are included in the report
- Creating Information Labels or Mail Merge documents inside a Data Mining Report
 - Identify the fields and ranges within the Data Mining report
 - Create the Information Label format or Mail Merge Document by inserting those fields
 - The reports printed on labels or mail merge documents match the records coming out of the Data Mining report

Links to additional resources

[Link to pdf of Power Point](#)



Texas Skyward User Group Conference

Data Mining + Labels and Mail Merge (6I)

Butch Sloan – Garland ISD



This session will address...

- **Organizing Data Mining Reports**
 - Developing reports that can be used by campus staff at any campus
 - Building filters to organize groups of similar reports to make them easier to find
- **Considerations for more involved reporting**
 - Creating User-Defined Fields (UDF) to add information to reports displayed in Skyward Family Access
 - Using the field areas to make sure that only the students you want are included in the report
- **Creating Information Labels or Mail Merge documents inside a Data Mining Report**
 - Identify the fields and ranges within the Data Mining report
 - Create the Information Label format or Mail Merge Document by inserting those fields
 - The reports printed on labels or mail merge documents match the records coming out of the Data Mining report

Reports which can be generated for any campus without “cloning”

Views: Report Information ▼ Filters: 000 Reports for Any Campus		
Report Name* ▲	Report Title	Fa
▶ 000 CY Class Rosters	000 CY Class Rosters	
▶ 000 Family Access User Info	000 Family Access User Info	
▶ 000 Last Year Grade 5 List	000 Last Year Grade 5 Students	
▶ 000 LEP Student Data	000 LEP Student Data	

Students often have multiple records for LEP Programs (Bilingual, then ESL, etc.). Finding each student's currently active LEP program requires finding the record where the End Date is BLANK.

End Date (LEP Programs)

Print Field on Report Individual Selections

Select

= [BLANK]

Example of UDF Freeform Comment field used to describe the other fields in the Data Mining Report.

Field Selection Field Search

Field Areas	UDF
Online Assignments	Freeform Comment 1
Picture	Freeform Comment 2
Portfolio	Freeform Comment 3
Response to Intervention	Freeform Comment 4
Schedule	Freeform Comment 5
Special Education	Freeform Comment 6
Special Programs	Freeform Comment 7
Textbook	Freeform Comment 8
Transcript	Freeform Comment 9
UDF	UDF Entity
Voc Ed	UDF Family

Freeform Comment 1 (UDF)

Print Field on Report Individual Selections

Comment:

Headings 1: Headings 2: Length:

Testing Precode reports based on students currently

- (1) enrolled in courses with specific PEIMS Service IDs or
- (2) enrolled in specific grade levels

Views: Report Information ▼		Filters: Testing Precode Reports
Report Name* ▲	Report Title	F
▶ TST EOC Precode Data Algebra 1	TST EOC-Algebra 1 Precode Data	
▶ TST EOC Precode Data English II	TST EOC-English II Precode Data	
▶ TST STAAR Precode Grades 6-8	TST STAAR Gr 6-8 Precode Data	

Information Labels can be laid out by selecting the fields from our Data Mining report for each line of the label.

Information Labels Maintenance

Template Settings

* Template Description:

Share with other users in entity 001

Print Greenbar

Available Fields

Field	Group	Length
Default Entity Code	[Profile]	6
Grad Year	[Profile]	4
Grade	[Profile]	2
Other ID	[Profile]	12
Birth Date	[Profile]	10
Gender	[Profile]	3
Student First Name	[Profile]	17
Student Middle Name	[Profile]	15
Student Last Name	[Profile]	30
Special Education (Y/N)	[Profile]	6
As Of Date	[SE SEC504]	16
Home Language Code	[Profile]	9
As Of Date	[LEP Programs]	29
As Of Date - Bil	[LEP Programs]	29
As Of Date - ESL	[LEP Programs]	29
Hispanic/Latino Ethnicity	[Profile]	11

Information Label Appearance

- 1:
- 2:
- 3:
- 4:
- 5:
- 6:

Line Information

Line 1
 Line 2
 Line 3
 Line 4
 Line 5
 Line 6

Field	Group	Length	Length	Spacing	Trim
Student First Name	[Profile]	17	17	1	Yes
Student Last Name	[Profile]	30	30	1	Yes

Trim Trailing Spaces

Spacing After Field:
 Selected Field Length:
 Total Line Length:

Clicking the Label Setup button allows you to select one of the standard label layouts (Avery 5160, for example).

Label Options

Label Export Options

Skyward Labels:

MS Word (This option will generate a csv file that can be used for a merge)

Label Overrides

Number of Labels Across: Start With Label:

Number of Positions to Indent: Label Sort Order:

Number of Labels per Person:

Label Default Settings

Margins	Label Dimensions	Pitch	Number of Labels
Top: <input type="text" value="2"/>	Height: <input type="text" value="5"/>	Vertical: <input type="text" value="1"/>	Across: <input type="text" value="3"/>
Side: <input type="text" value="0"/>	Width: <input type="text" value="30"/>	Horizontal: <input type="text" value="3"/>	Down: <input type="text" value="10"/>

Page Set-up

Lines Per Inch: Label Type:

Char Per Inch: Orientation:

The Mail Merge interface allows you to create and edit a document using a set of tools in a menu bar similar to Microsoft WORD.

Mail Merge

Template Settings

* Template Description:

Share with other users in entity 001

Print Greenbar

Mail Merge Document

Source | Arial | 14 | ↶ | ↷ | **B** | *I* | U | **S** | | | | | |

☰ | ☰ | ☰ | ☰ | ☰ | ☰ | ☰ | ☰ | Merge Fields

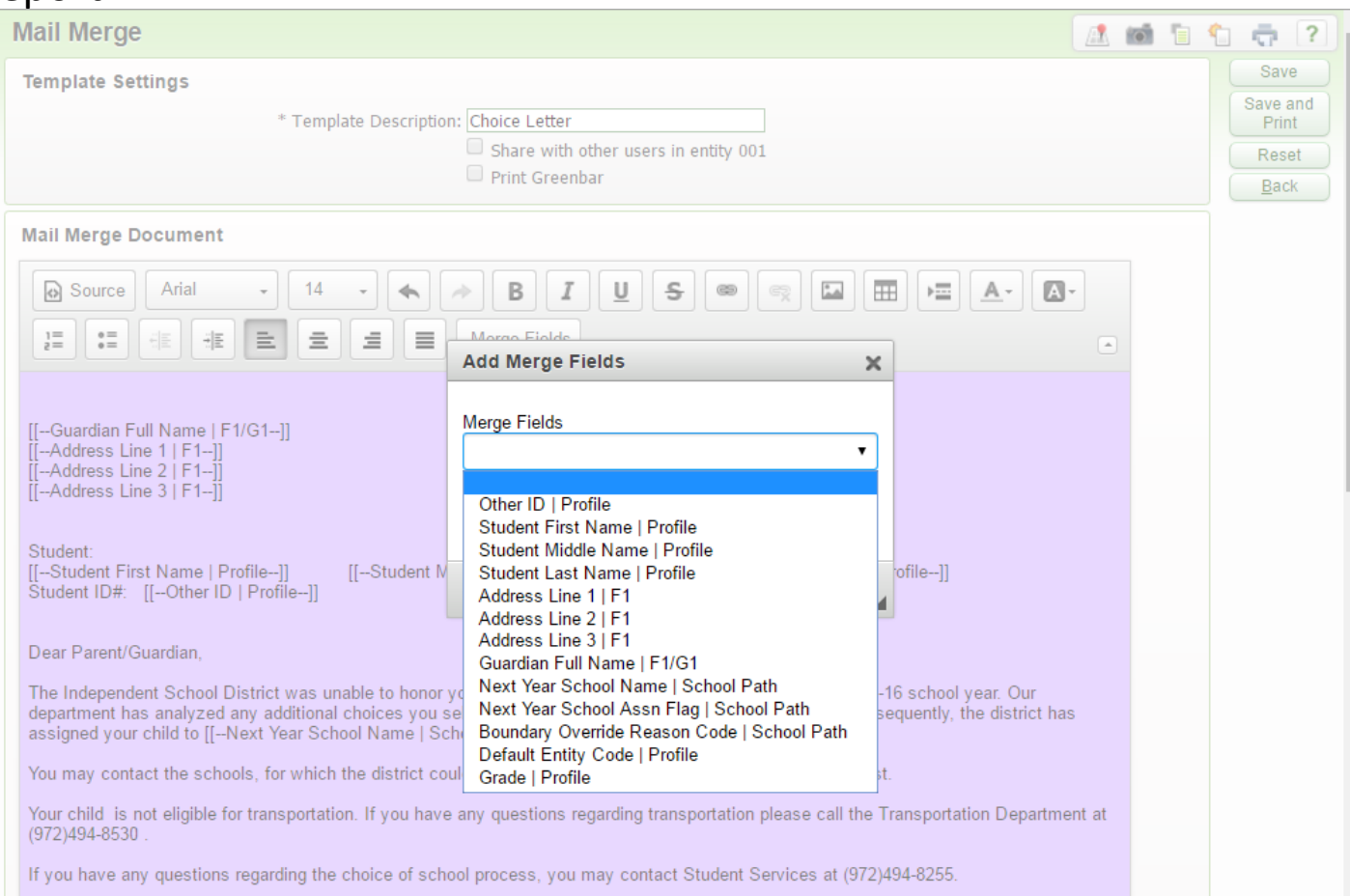
[[--Guardian Full Name | F1/G1--]]
[[--Address Line 1 | F1--]]
[[--Address Line 2 | F1--]]
[[--Address Line 3 | F1--]]

Student:
[[--Student First Name | Profile--]] [[--Student Middle Name | Profile--]] [[--Student Last Name | Profile--]]
Student ID#: [[--Other ID | Profile--]]

Dear Parent/Guardian,

The Independent School District was unable to honor your child's first choice of school selection for the 2015-16 school year. Our department has analyzed any additional choices you selected during the 20-day choice of school period. Subsequently, the district has

Clicking the Merge Fields button on the toolbar allows you to insert any of the fields from your Data Mining report.



The screenshot displays the 'Mail Merge' application interface. At the top, the 'Template Settings' section includes a 'Template Description' field with the value 'Choice Letter', and two checkboxes: 'Share with other users in entity 001' and 'Print Greenbar'. Below this is the 'Mail Merge Document' section, which features a rich text editor toolbar with options for source, font (Arial), size (14), and various text formatting tools. The document content contains several merge fields, such as '[[--Guardian Full Name | F1/G1--]]', '[[--Address Line 1 | F1--]]', and 'Student: [[--Student First Name | Profile--]]'. An 'Add Merge Fields' dialog box is open, showing a list of available fields from a data mining report, including 'Other ID | Profile', 'Student First Name | Profile', 'Student Middle Name | Profile', 'Student Last Name | Profile', 'Address Line 1 | F1', 'Address Line 2 | F1', 'Address Line 3 | F1', 'Guardian Full Name | F1/G1', 'Next Year School Name | School Path', 'Next Year School Assn Flag | School Path', 'Boundary Override Reason Code | School Path', 'Default Entity Code | Profile', and 'Grade | Profile'. On the right side of the interface, there are buttons for 'Save', 'Save and Print', 'Reset', and 'Back'.



Texas Skyward User Group Conference

THANK YOU FOR ATTENDING!

