



**Texas Skyward User Group Conference**

# **Making the Most of Profile**

**Jeanne Arbuckle**



# Making the Most of Profile



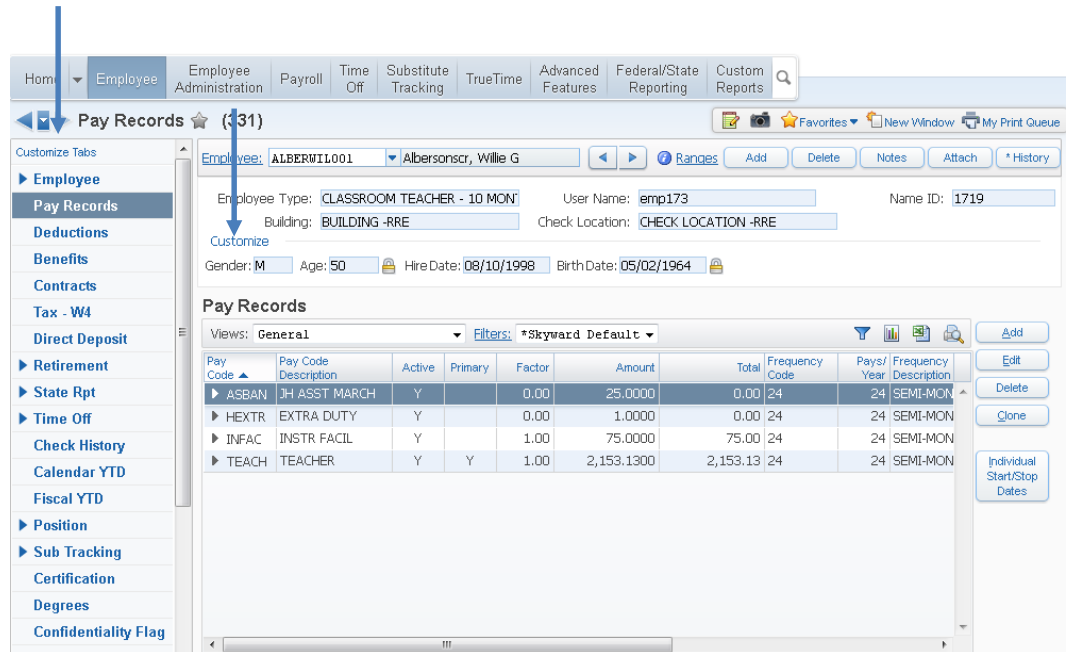
This session demonstrates the power of Employee Profile and Employee Browse. We will discuss:

- Employee Profile versus Employee Browse.
- Screen configurations
- Views
- Filters

# Making the Most of Profile

## Employee Profile

- Customize Tabs
- Customize central information area



The screenshot shows the Skyward Employee Profile interface. The 'Employee' tab is selected in the top navigation bar. The 'Pay Records' tab is active, showing a table of pay records for employee ALBERMIL001 (Alberscr, Willie G). The table includes columns for Pay Code, Pay Code Description, Active, Primary, Factor, Amount, Total, Frequency Code, Pays/Year, and Frequency Description. The table contains four rows of data:

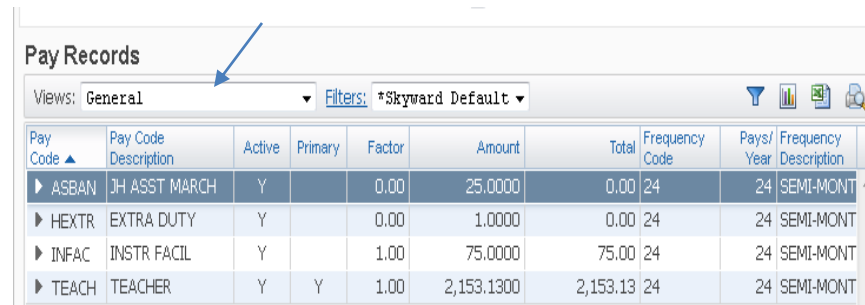
Pay Code	Pay Code Description	Active	Primary	Factor	Amount	Total	Frequency Code	Pays/Year	Frequency Description
ASBAN	JH ASST MARCH	Y		0.00	25.0000	0.00	24	24	SEMI-MON
HEXTR	EXTRA DUTY	Y		0.00	1.0000	0.00	24	24	SEMI-MON
INFAC	INSTR FACIL	Y		1.00	75.0000	75.00	24	24	SEMI-MON
TEACH	TEACHER	Y	Y	1.00	2,153.1300	2,153.13	24	24	SEMI-MON

# Making the Most of Profile

## Employee Profile

- Some screens have multiple views you can choose from

- This is the default view

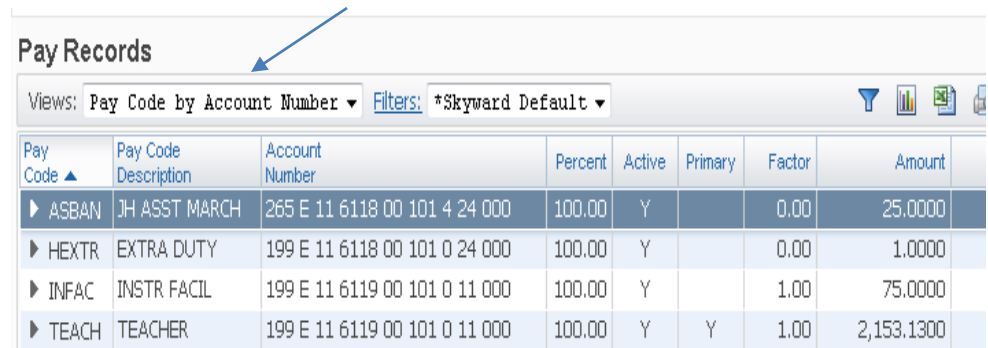


Pay Records

Views: General Filters: \*Skyward Default

Pay Code	Pay Code Description	Active	Primary	Factor	Amount	Total	Frequency Code	Pays/Year	Frequency Description
▶ ASBAN	JH ASST MARCH	Y		0.00	25.0000	0.00	24	24	SEMI-MONT
▶ HEXTR	EXTRA DUTY	Y		0.00	1.0000	0.00	24	24	SEMI-MONT
▶ INFAC	INSTR FACIL	Y		1.00	75.0000	75.00	24	24	SEMI-MONT
▶ TEACH	TEACHER	Y	Y	1.00	2,153.1300	2,153.13	24	24	SEMI-MONT

- This is an alternative view



Pay Records

Views: Pay Code by Account Number Filters: \*Skyward Default

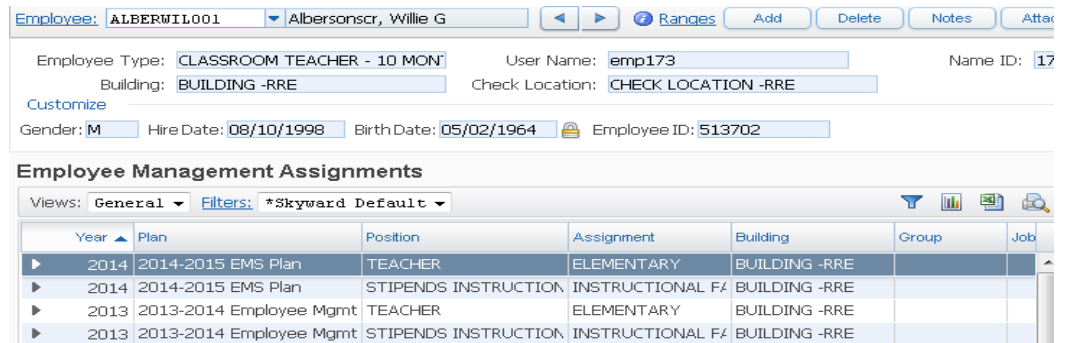
Pay Code	Pay Code Description	Account Number	Percent	Active	Primary	Factor	Amount
▶ ASBAN	JH ASST MARCH	265 E 11 6118 00 101 4 24 000	100.00	Y		0.00	25.0000
▶ HEXTR	EXTRA DUTY	199 E 11 6118 00 101 0 24 000	100.00	Y		0.00	1.0000
▶ INFAC	INSTR FACIL	199 E 11 6119 00 101 0 11 000	100.00	Y		1.00	75.0000
▶ TEACH	TEACHER	199 E 11 6119 00 101 0 11 000	100.00	Y	Y	1.00	2,153.1300

# Making the Most of Profile

## Employee Profile

- Create personal filters to see the data you want to see at a glance

- Example of standard filter



Employee: ALBERWIL001 | Albersonscr, Willie G

Employee Type: CLASSROOM TEACHER - 10 MON | User Name: emp173 | Name ID: 17  
Building: BUILDING -RRE | Check Location: CHECK LOCATION -RRE

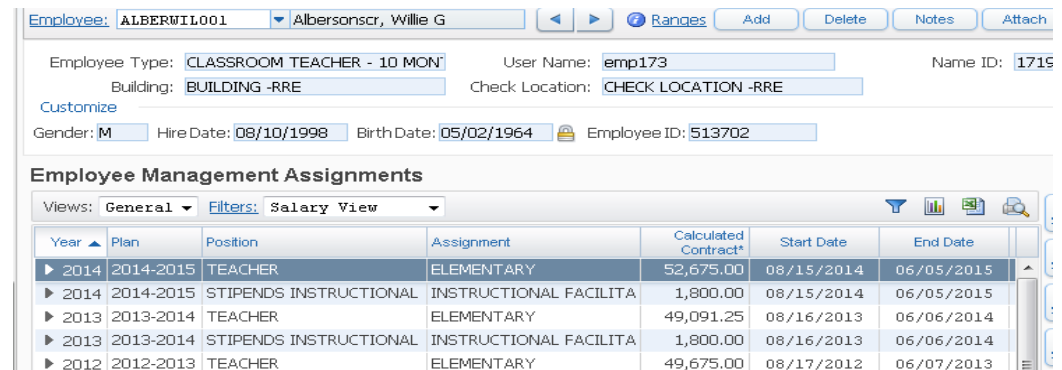
Gender: M | Hire Date: 08/10/1998 | Birth Date: 05/02/1964 | Employee ID: 513702

### Employee Management Assignments

Views: General | Filters: \*Skyward Default

Year	Plan	Position	Assignment	Building	Group	Job
▶ 2014	2014-2015 EMS Plan	TEACHER	ELEMENTARY	BUILDING -RRE		
▶ 2014	2014-2015 EMS Plan	STIPENDS INSTRUCTION	INSTRUCTIONAL FA	BUILDING -RRE		
▶ 2013	2013-2014 Employee Mgmt	TEACHER	ELEMENTARY	BUILDING -RRE		
▶ 2013	2013-2014 Employee Mgmt	STIPENDS INSTRUCTION	INSTRUCTIONAL FA	BUILDING -RRE		

- Example of user created filter for same screen



Employee: ALBERWIL001 | Albersonscr, Willie G

Employee Type: CLASSROOM TEACHER - 10 MON | User Name: emp173 | Name ID: 1719  
Building: BUILDING -RRE | Check Location: CHECK LOCATION -RRE

Gender: M | Hire Date: 08/10/1998 | Birth Date: 05/02/1964 | Employee ID: 513702

### Employee Management Assignments

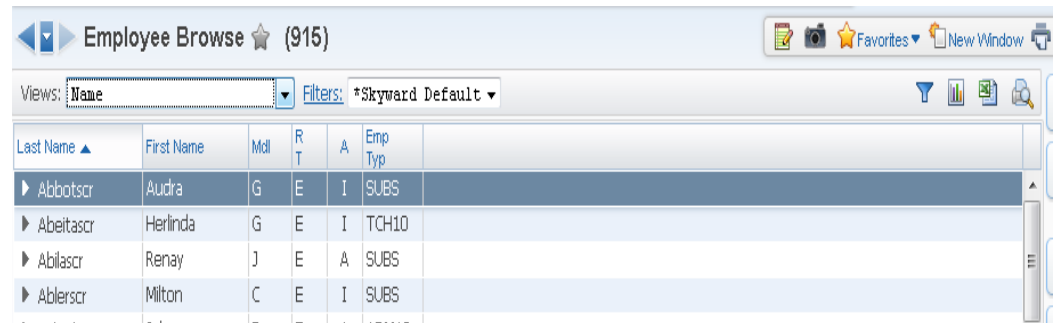
Views: General | Filters: Salary View

Year	Plan	Position	Assignment	Calculated Contract*	Start Date	End Date
▶ 2014	2014-2015	TEACHER	ELEMENTARY	52,675.00	08/15/2014	06/05/2015
▶ 2014	2014-2015	STIPENDS INSTRUCTIONAL	INSTRUCTIONAL FACILITA	1,800.00	08/15/2014	06/05/2015
▶ 2013	2013-2014	TEACHER	ELEMENTARY	49,091.25	08/16/2013	06/06/2014
▶ 2013	2013-2014	STIPENDS INSTRUCTIONAL	INSTRUCTIONAL FACILITA	1,800.00	08/16/2013	06/06/2014
▶ 2012	2012-2013	TEACHER	ELEMENTARY	49,675.00	08/17/2012	06/07/2013

# Making the Most of Profile

Employee Browse has many different Views to choose from

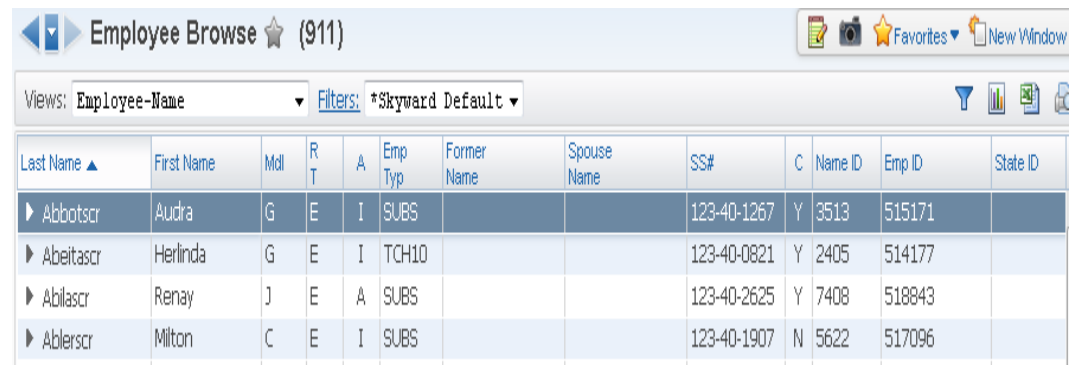
- Here is the default Name view



Employee Browse (915) | Views: Name | Filters: \*Skyward Default

Last Name ▲	First Name	Mdl	R T	A	Emp Typ	
▶ Abbotscr	Audra	G	E	I	SUBS	
▶ Abeitascr	Herlinda	G	E	I	TCH10	
▶ Abilascr	Renay	J	E	A	SUBS	
▶ Ablerscr	Milton	C	E	I	SUBS	

- Here is an alternative Name view



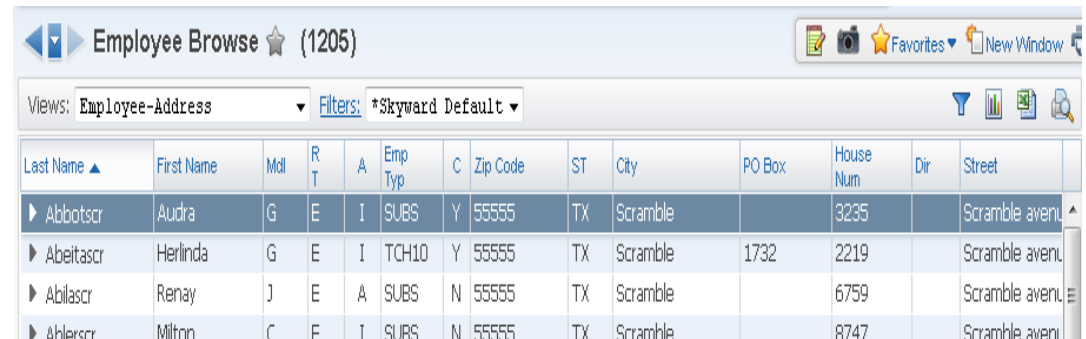
Employee Browse (911) | Views: Employee-Name | Filters: \*Skyward Default

Last Name ▲	First Name	Mdl	R T	A	Emp Typ	Former Name	Spouse Name	SS#	C	Name ID	Emp ID	State ID
▶ Abbotscr	Audra	G	E	I	SUBS			123-40-1267	Y	3513	515171	
▶ Abeitascr	Herlinda	G	E	I	TCH10			123-40-0821	Y	2405	514177	
▶ Abilascr	Renay	J	E	A	SUBS			123-40-2625	Y	7408	518843	
▶ Ablerscr	Milton	C	E	I	SUBS			123-40-1907	N	5622	517096	

# Making the Most of Profile

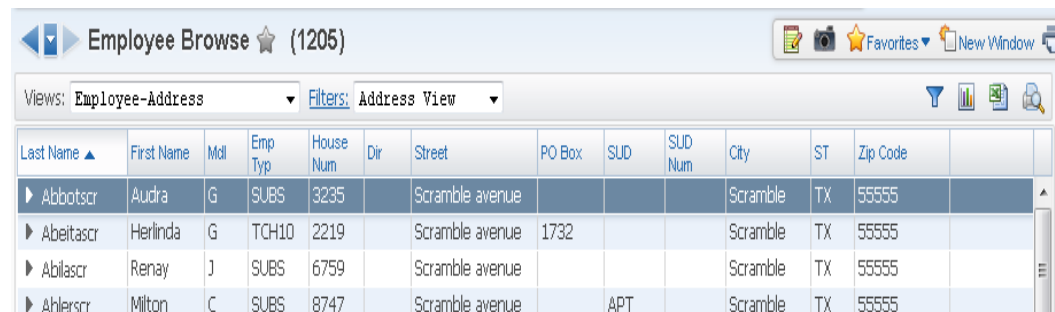
Employee Browse – Select a View and then create customized Filters

- Here is an example of the default Address View



Last Name ▲	First Name	Mdl	R T	A	Emp Typ	C	Zip Code	ST	City	PO Box	House Num	Dir	Street
▶ Abbottscr	Audra	G	E	I	SUBS	Y	55555	TX	Scramble		3235		Scramble avenue
▶ Abeitascr	Herlinda	G	E	I	TCH10	Y	55555	TX	Scramble	1732	2219		Scramble avenue
▶ Abilascr	Renay	J	E	A	SUBS	N	55555	TX	Scramble		6759		Scramble avenue
▶ Ahlerscr	Milton	C	F	I	SUBS	N	55555	TX	Scramble		8747		Scramble avenue

- Here is the Address View with a custom filter



Last Name ▲	First Name	Mdl	Emp Typ	House Num	Dir	Street	PO Box	SUD	SUD Num	City	ST	Zip Code
▶ Abbottscr	Audra	G	SUBS	3235		Scramble avenue				Scramble	TX	55555
▶ Abeitascr	Herlinda	G	TCH10	2219		Scramble avenue	1732			Scramble	TX	55555
▶ Abilascr	Renay	J	SUBS	6759		Scramble avenue				Scramble	TX	55555
▶ Ahlerscr	Milton	C	SUBS	8747		Scramble avenue		APT		Scramble	TX	55555

# Making the Most of Profile



With the Filter set up screen, you can re-size, move, or hide columns. You can set ranges, set Custom Sorts and change the number of locked columns.

Browse View: Employee-Address  
 \* Filter Name: Address View  
 Filter Details:

This is a temporary filter. When checked, this filter is deleted the next time you log into Skyward on the web.

**Browse Options**  
 Number of Locked Columns:   
 Display Totals Count Only

**Column Display Options and Filters**

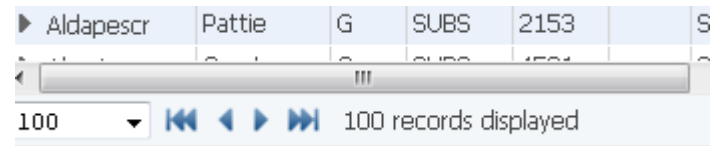
Move	Label	Display	Width	Low Value	High Value	
	Last Name	<input checked="" type="checkbox"/>	84%		ZZZZZZZZZZZZ	Reset
	First Name	<input checked="" type="checkbox"/>	70%		ZZZZZZZZZZZZ	Reset
	Mdl	<input checked="" type="checkbox"/>	100%		ZZZ	
	Emp Typ	<input checked="" type="checkbox"/>	100%		ZZZZ	
	House Num	<input checked="" type="checkbox"/>	68%		ZZZZZZZZZZZZZZZZZZ	Reset
	Dir	<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	
	Street	<input checked="" type="checkbox"/>	89%		ZZZZZZZZZZZZZZZZZZ	Reset
	PO Box	<input checked="" type="checkbox"/>	72%		ZZZZZZZZZZZZZZZZZZ	Reset
	SUD	<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	
	SUD Num	<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	
	City	<input checked="" type="checkbox"/>	67%		ZZZZZZZZZZZZZZZZZZ	Reset
	ST	<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	
	Zip Code	<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	
	R T	<input type="checkbox"/>	100%		Z	Reset
	A	<input type="checkbox"/>	100%	Both		Reset
	C	<input type="checkbox"/>	100%	Both		Reset
	Address 2	<input type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	Reset
	Cnty	<input type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	Reset
	Town	<input type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	Reset
	Mail Addr	<input type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	Reset
		<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZ	

**Custom Sort**  
 Use Custom Sort  
 Sort #1:





- The number of records you choose to display per page affects the results you see when you use a Filter Custom Sort



▶	Aldapescr	Pattie	G	SUBS	2153	S
<				SUBS	1501	

100 100 records displayed





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**THANK YOU FOR ATTENDING!**

