

# EMPLOYEE DATA MINING

## Creating a Basic Report and Data Mining “Helpful Tips and Shortcuts”

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### HELPFUL TIPS & SHORTCUTS

#### Getting Started – WEB Human Resources/Employee/Data Mining Tutorial

**1** Account Preferences Exit ?  
Customer Access  
Remote Assistance  
SkyDoc - Skyward Documentation  
Skyward - www.skyward.com  
Browser Performance Test  
PaC to Web Status Display  
View My Security

**2** SKYWARD  
Skyward SKYDOC Home  
PaC SKYDOC Web SKYDOC  
Menu Search Index

**3** Skyward SKYDOC Home  
PaC SKYDOC Web SKYDOC  
Menu Search Index  
PW - PaC to Web Migration Resources  
WG - Web General Help  
AR - Additional Resources  
UI - SMS 2.0 Navigation Interface  
DW - Data Warehouse  
PS - Product Setup  
RW - Report Writing  
WA - Web Applications  
WF - Web Financial Management  
WH - Web Human Resources  
AD - Employee Administration  
AF - AF  
CM - Skyport Calendar Management  
CR - Custom Reports  
DW - Data Warehouse  
EP - Employee  
CF - Custom Forms  
DM - Data Mining  
EB - Employee Browse  
EP - Employee Profile  
EV - Evaluations

**4** **WEB DATA MINING TUTORIAL**  
Follow the Steps as Indicated on the Arrows to Preview the Tutorial's Basic Directions on How to Add, Clone or Create a DM Report

Web Human Resources - WH - 10657 - 05.13.02.00.13-10.2 - Windows Internet Explorer  
Skyward School District  
Jeanna Ormandscr Acco Print this tutorial

Home Employee Administration Payroll Time Off Substitute Tracking Insurance Tracking TrueTime Work Requests Advanced Features Federal/State Reporting Custom Reports

Human Resources Setup

Employee - EP Setup  
Employee Profile - EP  
Employee Browse - EB  
User Defined - UD  
Custom Forms - CF  
Data Mining - DM  
Pseudo Process - PA

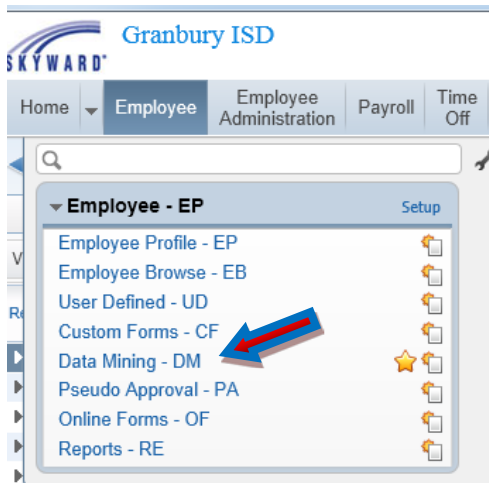
Evaluations - EV Setup  
Employee Evaluation Master - EM  
Employee Evaluations - EE  
Custom Evaluation Forms - CE

**Employee Data Mining**  
Navigate to Human Resources, Employee, Employee, Data Mining.  
**Who, What, When, Why?**  
Employee Data Mining allows you to select specific fields from the Profile to create a report.  
Create an Employee Data Mining report to print a report of selected profile data.

WHIEPIDM  
Financial Management Home WF  
Vendor/Payor Names WFACIVP  
Utilities WHIEPISUT

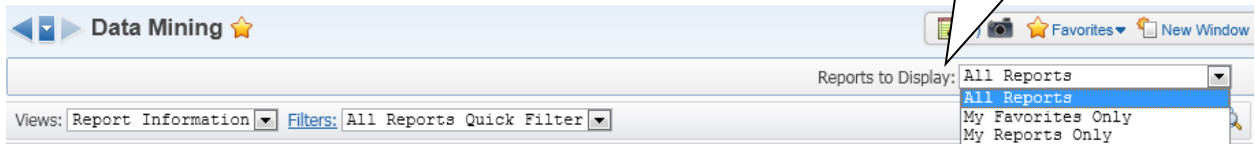
# GETTING STARTED - HELPFUL FEATURES – EMPLOYEE DATA MINING:

1

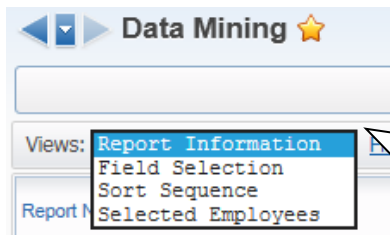


Select Either: All Reports  
My Favorites Only  
My Reports Only  
to Change How Reports are Displayed

2



3



Select "Views" to Provide Easier Selection Options Such as "Report Information"

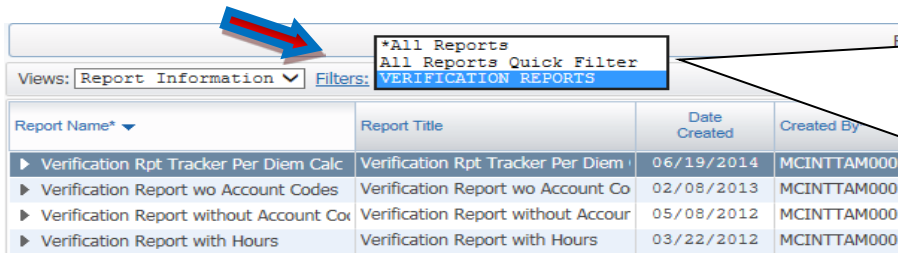
Report Name	Report Title	Favorite	Created By	Editable
▶ Verification Report Simple No Codes	Verification Report Simple No Cod	☆	MCINTTAM000	Y
▶ Verification Report Salary Only No Code	Verification Report Salary Only No	☆	MCINTTAM000	Y
▶ Verification Report Primary w Act Code	Verification Report Primary w Act	☆	MCINTTAM000	Y

4

Report Name	Report Title	Favorite	Created By	Editable
▶ TUTORS 2009 2010 In & Out	TUTORS 2009 2010 In & Out	☆	MCINTTAM000	Y
▶ UEA Open Records request 2	UEA Open Records request 2	☆	MCINTTAM000	Y
▶ Verification of XTerms to EM Assignme	Verification of XTerms to EM Assig	☆	MCINTTAM000	Y
▶ Verification Report	Verification Report	☆	MCINTTAM000	Y
▶ Verification Report for Auditors 11 12	Verification Report for Auditors 11	☆	MCINTTAM000	Y

Click on Title Boxes and Change the Order of Listings Such as "Report Title" for Alpha Order

5



Select "Filters" to Setup Various Filter Options for Easier and Quicker Selections

ADD FILTER and Set Parameters Such as Low Value and High Value; Move Labels and De-Select "DISPLAY" Labels You Do not Want to See



**Data Mining**

Report Name:

Report Title:

Report Orientation:  Employee Status:

Print All Information on One Line Per Person <sup>?</sup>  
*This option does not apply to Address Labels, Information Labels, Export to File, or Mail Merge*

Table Information <sup>?</sup>

Table Name	Print #
Position	1
Personnel	1
Name	1
Position/Position Payroll	1
Position/Position Payroll/Account Distribution	8

**FORMAT** Includes an Option to “Print All Information on One Line per Person”

Selection of This Option Removes Stacking on Skyward Reports



**Format** option is VERY helpful with many types of reports, with the correct settings.

Try it both ways with different reports and select the best display for **your**

Specific purpose!

Full Name	Employee Type	Position	Position	Position
Brown, Stacie Ann	Principal 12			
Position Description	St Code	Assignment Desc	Cell Phone	Position Assn St Code
Account Number		Distribution Percent		
199 E 23 6135 00 108 0 11 000		100.00		
Position Description	St Code	Assignment Desc	Cell Phone	Position Assn St Code
Campus Administration	Principal			
Account Number		Distribution Percent		
199 E 23 6117 00 108 0 11 000		100.00		

**SAMPLE STACKED** and **SAMPLE ... with “Print All Information on One Line Per Person” Selected**

Full Name	Employee Type	Position	Position	Account Number	Distribution Percent	Account Number
Brown, Stacie Ann	Principal 12	Allowance	Cell Phone	199 E 23 6135 00 108 0 11 000	100.00	

11

**FORMAT** Includes an Option to Display **Account Distributions** in Columns: No longer displays on multiple lines or in brackets. Using "Text to Columns" in Excel is no longer required in order to report multiple account distributions. ★

Table Name	Print #
Position	1
Personnel	1
Name	1
Position/Position Payroll	1
Position/Position Payroll/Account Distribution	8
Position/Position Add-ons	1



Account Number	Distribution %	Account Number	Distribution %
199 E 11 6117 00 001 0 11 460	100		
199 E 11 6117 00 005 0 11 390	50	199 E 11 6117 00 005 0 21 000	50
181 E 36 6117 00 001 0 99 300	100		
199 E 11 6117 00 001 0 22 750	50	199 E 11 6117 00 005 0 22 750	50
199 E 11 6125 00 106 0 24 940	100		
199 E 34 6125 98 800 0 23 000	87.5	199 E 34 6125 98 800 0 99 000	12.5
199 E 11 6117 00 341 0 11 410	100		

12

- Report Information
- Fields
- Ranges**
- Sorting
- Selected Employees
- Format

**RANGES** for Individual Selections works GREAT!!!

Example:

Select Edit Ranges ... Position Description ...  
INDIVIDUAL SELECTIONS – SELECT

Mark Individual Selections and SAVE

**Position Description (Position)**

Print Field on Report  Individual Selections

Select

**Individual Selections for: Position Description**

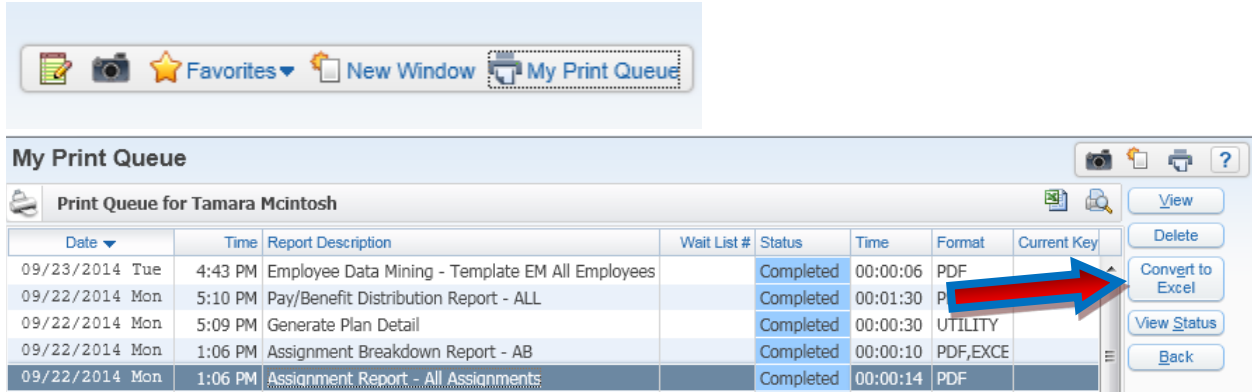
Views: Description and Code Filters: \*Skyward Default

Select	Description	Code
<input checked="" type="checkbox"/>	Allowance	
<input type="checkbox"/>	BONUS - Signing	
<input type="checkbox"/>	Campus Admin Support	
<input type="checkbox"/>	Campus Administration	
<input type="checkbox"/>	Channel 27	
<input checked="" type="checkbox"/>	Coach-FB Stipend	
<input checked="" type="checkbox"/>	Coach-FB XDays	
<input checked="" type="checkbox"/>	Coach-Other Stipend	
<input checked="" type="checkbox"/>	Coach-Other XDays	

Buttons: Save, Back, Select All, Unselect All

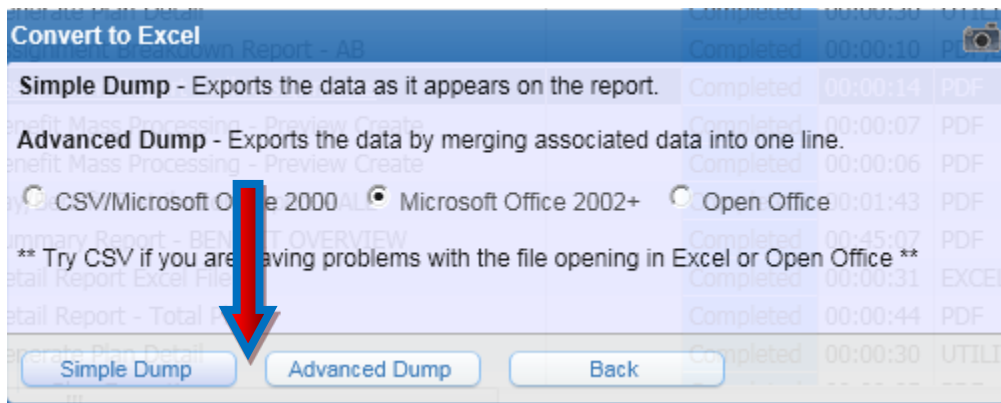
## CONVERTING SKYWARD REPORTS (Not Data Mining) TO EXCEL:

- 1 SELECT A PDF REPORT FROM “MY PRINT QUEUE”

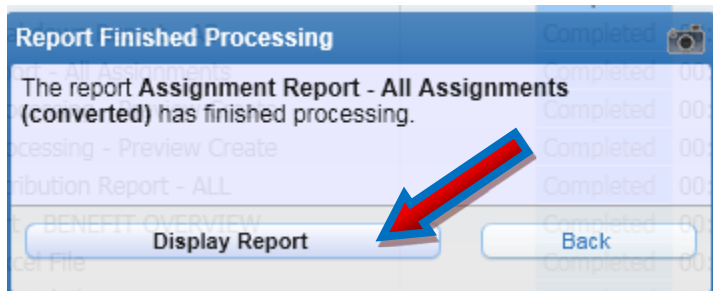


- 2 SELECT “CONVERT TO EXCEL”

- 3 REVIEW OPTIONS AND SELECT SIMPLE OR ADVANCED DUMP



- 4 SELECT DISPLAY REPORT



- 5 MODIFY AND FORMAT REPORT IN EXCEL

# CREATING A BASIC SKYWARD DATA MINING REPORT

## SELECT = DOUBLE MOUSE CLICK

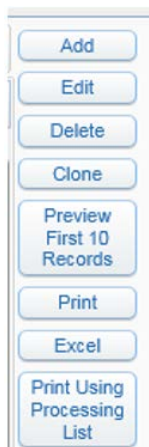
1. RUN Web



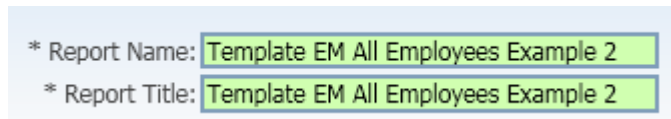
2. SELECT: Employee - Employee Data Mining - DM



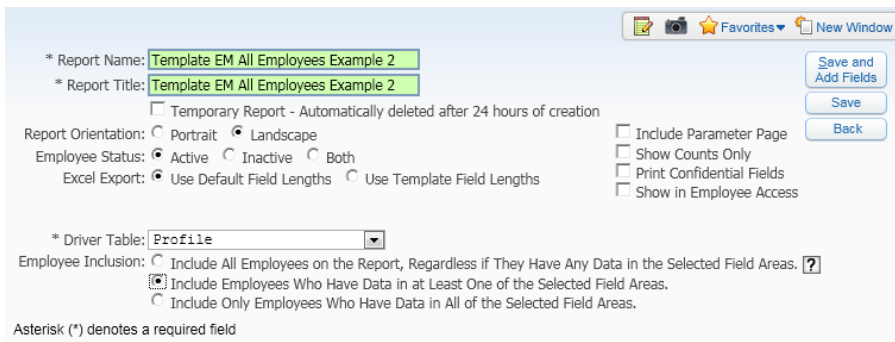
3. SELECT: Add



4. Report Name



5. REVIEW and SELECT: Options Available as Listed

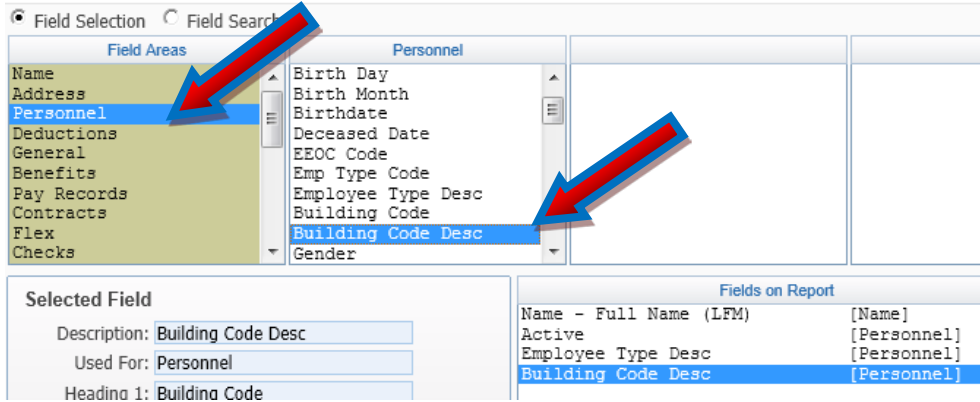


**I recommend that you select 2<sup>nd</sup> Option “Include Employees Who Have Data in at Least one of the Selected Field Areas.” The other options may limit your data too tight.**

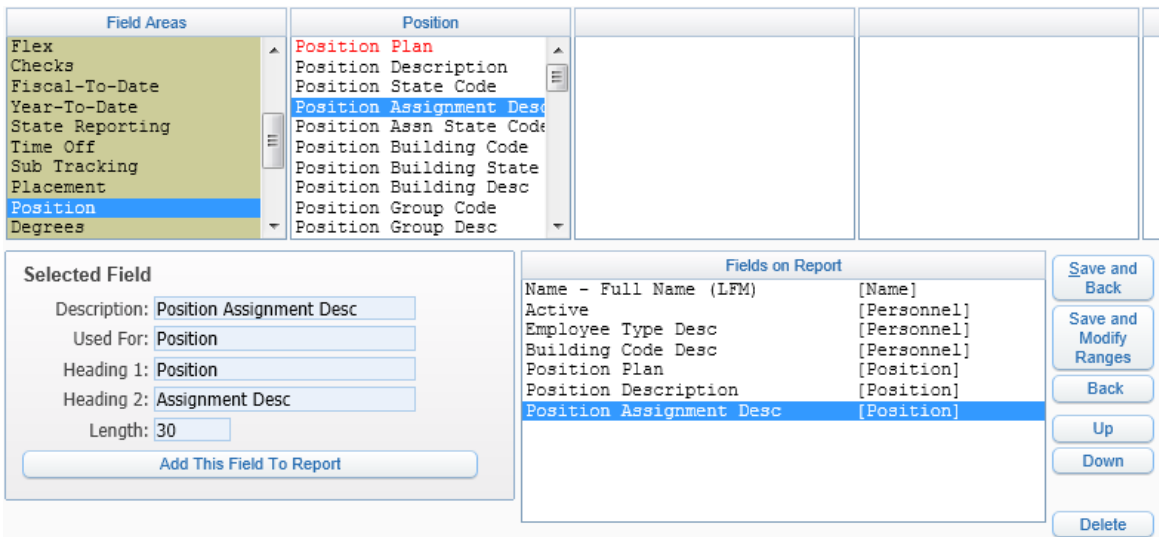
**6. SELECT: Save and Add Fields**

**7. SELECT: Name      a. SELECT: Name – Full Name (LFM)**

- 8. SELECT: Personnel    a. SELECT: Active**
- b. SELECT: Employee Type Desc**
- c. SELECT: Building Code Desc**



- 9. ARROW DOWN AND SELECT:      a. Position**
- b. Position Plan and**
- c. Position Description and**
- d. Position Assignment Description**





**10. PUT CURSOR ON POSITION PLAN and SELECT “Up” to Reposition Fields on Report**

The screenshot shows a window titled "Fields on Report" with a list of fields and their corresponding data types. The "Position Plan" field is highlighted in blue. To the right of the list are several buttons: "Save and Back", "Save and Modify Ranges", "Back", "Up", "Down", and "Delete". A callout box with an arrow pointing to the "Up" button contains the text "Move the selected field up in the list". A red and blue arrow points to the "Position Plan" field in the list.

Field Name	Data Type
Name - Full Name (LFM)	[Name]
Active	[Personnel]
Employee Type Desc	[Personnel]
Building Code Desc	[Personnel]
<b>Position Plan</b>	<b>[Position]</b>
Position Description	[Position]
Position Assignment Desc	[Position]

**11. SELECT: Save and Modify Ranges – This will take you to the RANGES Screen**

The screenshot shows the same "Fields on Report" window as in step 10, but now "Position Plan" is selected. The "Save and Modify Ranges" button is highlighted with a red and blue arrow.

Field Name	Data Type
<b>Position Plan</b>	<b>[Position]</b>
Name - Full Name (LFM)	[Name]
Active	[Personnel]
Employee Type Desc	[Personnel]
Building Code Desc	[Personnel]
Position Description	[Position]
Position Assignment Desc	[Position]

**12. ON THE RANGES SCREEN SELECT:**

**Position Plan and Check Individual Selections and Click Select**

The screenshot shows a window titled "Position Plan (Position)". It has two checked checkboxes: "Print Field on Report" and "Individual Selections". Below these is a "Select" button, which is highlighted with a red and blue arrow.

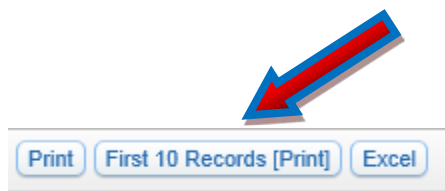
**13. SELECT Plan Description and SELECT SAVE**

The screenshot shows a window titled "Select EM Plan(s)". It has a table with columns for "Select", "Plan Description", "Plan Year", and "Plan ID". The row for "2015 - 2016 Active EM Plan" is selected, and its checkbox is checked. A red and blue arrow points to the "Save" button on the right side of the window.

Select	Plan Description	Plan Year	Plan ID
<input type="checkbox"/>	2007-2008 EMP MGMT PLAN	2007	9
<input type="checkbox"/>	2008-2009 Active EM Plan Final	2008	16
<input type="checkbox"/>	2009 - 2010 Active EM Plan	2009	30
<input type="checkbox"/>	2010 - 2011 Active EM Plan	2010	39
<input type="checkbox"/>	2011 - 2012 Active EM Plan	2011	49
<input type="checkbox"/>	2012 - 2013 Active EM Plan	2012	62
<input type="checkbox"/>	2013 - 2014 Active EM Plan	2013	71
<input type="checkbox"/>	2014 - 2015 Active EM Plan Fin	2014	77
<input checked="" type="checkbox"/>	2015 - 2016 Active EM Plan	2015	87



17. SELECT: First 10 Records



18. SELECT: View Report



Review this sample report – Does it include the data that I need?  
SELECT X to Close After Reviewing

19. Modify Report as Necessary Until Satisfied with Data/Report

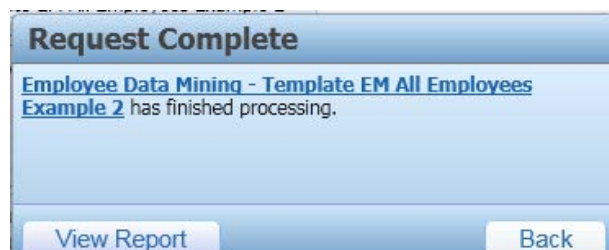
20. SELECT: Either PRINT or EXCEL ... I ALWAYS Select to Download to Excel



21. WAIT for My Print Queue to Prepare Report

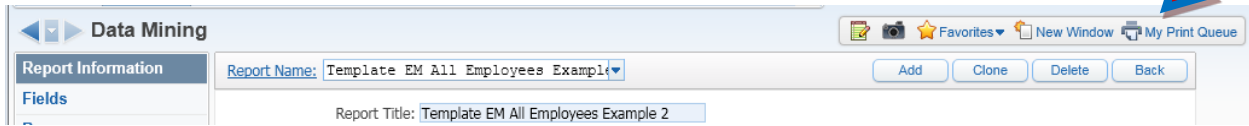


22. SELECT: View Report and Open and Yes (If you receive this format warning)



## 23. EDIT, FORMAT AND SAVE EXCEL REPORT

## 24. SELECT: Back in Skyward to Close Employee Data Mining






### **NOTE:**

If you have your VIEW set at “Field Selection” your new report will be viewable under Report Name instantly.

If you have your VIEW set at ”Report Information” you will need to Select Your New Report Name to edit, clone, print, etc.

The above is an example of a very “basic” report setup, but it provides the general information on how to setup your report, select your fields and ranges and change your “format” if helpful (see Helpful Tips and Shortcuts).

### **Explore and Try Various Other Methods in Skyward to Create Simple Reports in Addition to Using Data Mining:**

- Use the EXCEL  Icon to Download Data into Excel from Various Screens
- Use “Reports” in EMPLOYEE ADMINISTRATION to Create Numerous Skyward Reports
- After Running Reports, Go To “My Print Queue” Select a Report and Convert to Excel
- Use the PRINTER FRIENDLY  Icon to Display Current View – Select to Show or Hide Each Field - Select “Print This Screen”
- Use the CAMERA  Icon to Send a Screen Shot of Current View to the Print Queue