

EXCEL IN EMPLOYEE MANAGEMENT

(Basic Data Analysis)

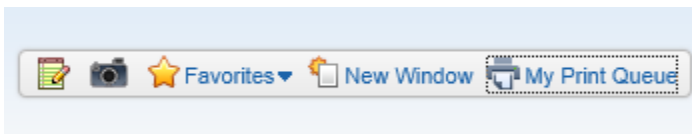
Basic Overview – Exporting and Manipulating Data in Excel Spreadsheets

Tam McIntosh, Weatherford ISD

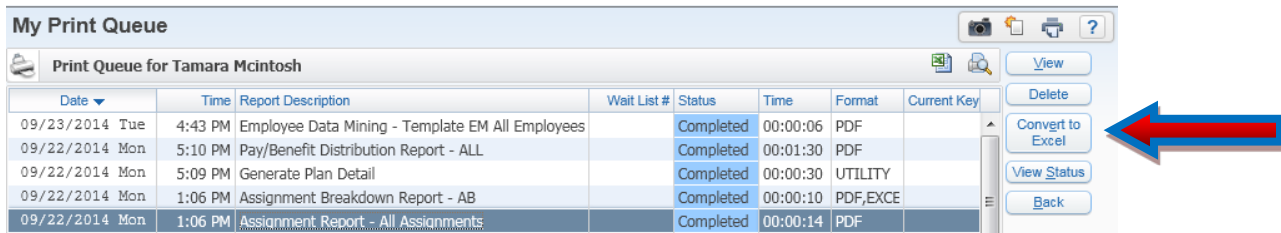
Contact: tmcintosh@weatherfordisd.com

I. CONVERTING SKYWARD REPORTS (Not Data Mining) TO EXCEL:

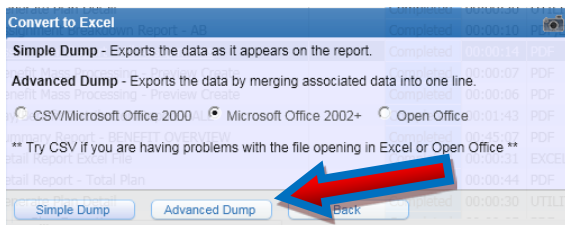
- 1 GO TO ICON BOX and SELECT A PDF REPORT FROM “MY PRINT QUEUE”



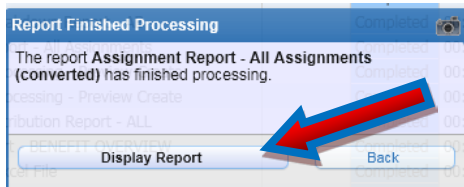
- 2 SELECT “CONVERT TO EXCEL”



- 3 REVIEW OPTIONS AND SELECT SIMPLE OR ADVANCED DUMP



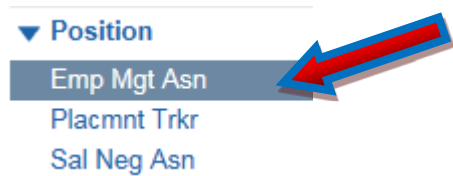
- 4 SELECT DISPLAY REPORT



- 5 MODIFY AND FORMAT REPORT IN EXCEL
ANOTHER OPTION: If you have Adobe Pro you can Select “File Save” and Select “Save as Type – EXCEL.”

II. QUICK REPORT – EXAMPLE: EMPLOYEE MANAGEMENT ASSIGNMENTS:

1 SELECT “Employee Profile – Position – Emp Mgt Asn”



2 CLICK “Year” Twice to Sort in Ascending Order

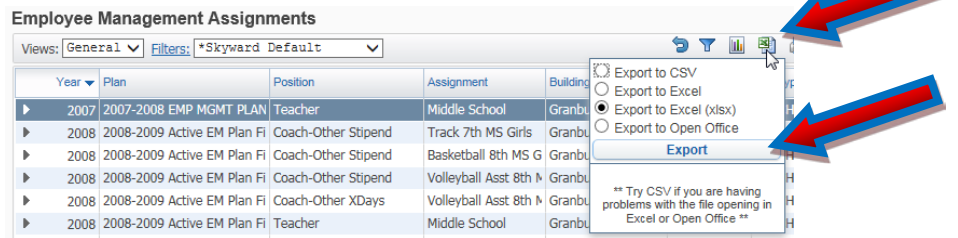


Employee Management Assignments

Views: General Filters: *Skyward Default

Year	Plan	Position	Assignment	Building
2007	2007-2008 EMP MGMT PLAN	Teacher	Middle School	Granbury Middle Scl
2008	2008-2009 Active EM Plan Fi	Coach-Other Stipend	Track 7th MS Girls	Granbury Middle Scl
2008	2008-2009 Active EM Plan Fi	Coach-Other Stipend	Basketball 8th MS G	Granbury Middle Scl
2008	2008-2009 Active EM Plan Fi	Coach-Other Stipend	Volleyball Asst 8th M	Granbury Middle Scl
2008	2008-2009 Active EM Plan Fi	Coach-Other XDays	Volleyball Asst 8th M	Granbury Middle Scl
2008	2008-2009 Active EM Plan Fi	Teacher	Middle School	Granbury Middle Scl
2009	2009 - 2010 Active EM Plan	Coach-Other Stipend	Track Asst 8th MS G	Granbury Middle Scl
2009	2009 - 2010 Active EM Plan	Coach-Other XDays	Volleyball Asst 8th M	Granbury Middle Scl
2009	2009 - 2010 Active EM Plan	Coach-Other Stipend	Volleyball Asst 8th M	Granbury Middle Scl
2009	2009 - 2010 Active EM Plan	Coach-Other Stipend	Basketball 8th MS G	Granbury Middle Scl
2009	2009 - 2010 Active EM Plan	Teacher	Middle School	Granbury Middle Scl
2009	2009 - 2010 Active EM Plan	Extra Duty Pay-XDays	Department Chair	Granbury Middle Scl
2010	2010 - 2011 Active EM Plan	Coach-Other Stipend	Track Asst 8th MS G	Granbury Middle Scl

3 Click On EXCEL ICON to SELECT “Export to Excel” – “Export”



4 Click “Download Exported File”



5 If you receive a similar message box Click “Open”



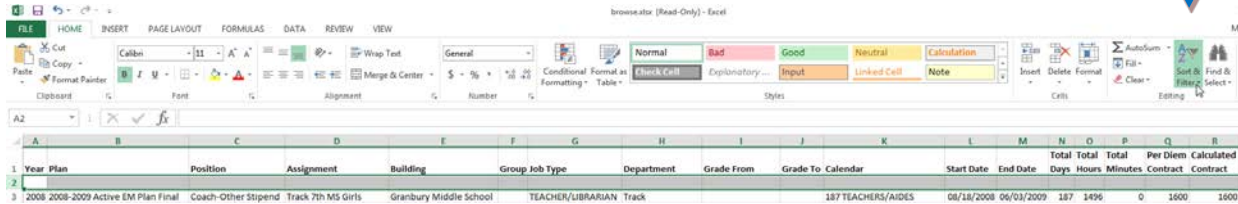
6 All Data in EM Assignments Including Assignment Details, Salary Information, Payroll Information, Etc. for ALL Years Listed will Download to an Excel Spreadsheet. Edit.

Year	Plan	Position	Assignment	Building	Group	Job Type	Department
2007	2007-2008 EMP MGMT PLAN	Coach-Other Stipend	Volleyball Asst 8th MS	Granbury Middle School		TEACHER/LIBRARIAN	Volleyball
2007	2007-2008 EMP MGMT PLAN	Coach-Other Stipend	Track Asst 8th MS Girls	Granbury Middle School		TEACHER/LIBRARIAN	Track
2007	2007-2008 EMP MGMT PLAN	Coach-Other Stipend	Basketball 8th MS Girls	Granbury Middle School		TEACHER/LIBRARIAN	Basketball
2007	2007-2008 EMP MGMT PLAN	Coach-Other XDays	Volleyball Asst 8th MS	Granbury Middle School		TEACHER/LIBRARIAN	Volleyball

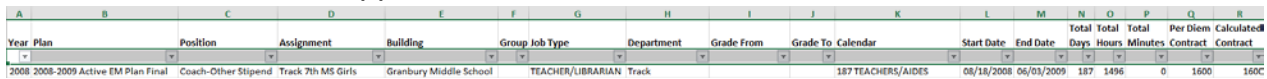
Grade From	Grade To	Calendar	Start Date	End Date	Total Days	Total Hours	Total Minutes	Per Diem Contract	Calculated Contract	Pay Cd
		187 TEACHERS/AIDES	08/18/2008	06/03/2009	187	1496	0	1600	1600	ZGTRK
		187 TEACHERS/AIDES	08/18/2008	06/03/2009	187	1496	0	2800	2800	ZGBSK
		187 TEACHERS/AIDES	08/18/2008	06/03/2009	187	1496	0	1600	1600	ZVOLL
		187 TEACHERS/AIDES	08/18/2008	06/03/2009	5	40	0	1453.2	1453.2	XEXDY
6th/Coach		187 TEACHERS/AIDES	08/18/2008	06/03/2009	187	1496	0	54350	54350	TEACH


III. EXCEL FILTERS:

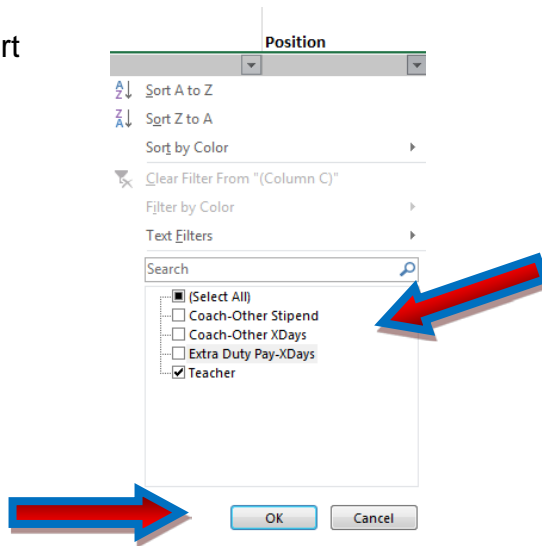
- 1 AFTER DOWNLOADING DATA TO AN EXCEL SPREADSHEET ...
Place Cursor on 2nd Row Under Titles – KEEP CURSOR ON 2ND ROW
SELECT “INSERT ROW”
and Then SELECT “Sort & Filter” FILTER



Arrow Boxes Will Then Appear in 2nd Row on Each Column



- 2 Place Cursor on Column to Filter/Sort
Filter Icon Changes to 
A List of Selections Will Appear
DeSelect Options Not Desired
Select “OK”



- 3 Only Selected Data Will be Listed – Copy and Paste to Sheet 2, etc. as Desired

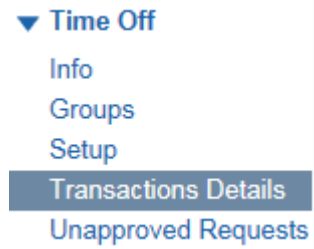
Year Plan	Position	Assignment	Building	Group Job Type	Department	Grade From
2008 2008-2009 Active EM Plan Final	Teacher	Middle School	Granbury Middle School	T	TEACHER/LIBRARIAN	6th/Coach
2009 2009 - 2010 Active EM Plan	Teacher	Middle School	Granbury Middle School	T	TEACHER/LIBRARIAN	Inclusion/Coach
2010 2010 - 2011 Active EM Plan	Teacher	Middle School	Granbury Middle School	T	TEACHER/LIBRARIAN	Inclusion/Coach
2011 2011 - 2012 Active EM Plan	Teacher	Middle School	Granbury Middle School	T	TEACHER/LIBRARIAN	Inclusion/Coach
2012 2012 - 2013 Active EM Plan	Teacher	Middle School	Granbury Middle School	T	TEACHER/LIBRARIAN	Inclusion/Coach

Select as Many Filters as Desired: In This Example “Position” and “Calendar” are Filtered

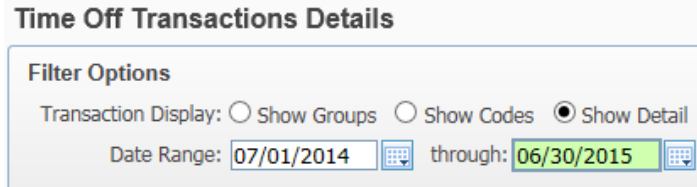
Year Plan	Position	Assignment	Building	Group Job Type	Department	Grade From	Grade To	Calendar
2008 2008-2009 Active EM Plan Final	Teacher	Middle School	Granbury Middle School	T	TEACHER/LIBRARIAN	Special Education	6th/Coach	187 TEACHERS/AIDES
2009 2009 - 2010 Active EM Plan	Teacher	Middle School	Granbury Middle School	T	TEACHER/LIBRARIAN	Special Education	Inclusion/Coach	187 TEACHERS/AIDES

IV. EMPLOYEE - TIME OFF TRANSACTION DETAIL:

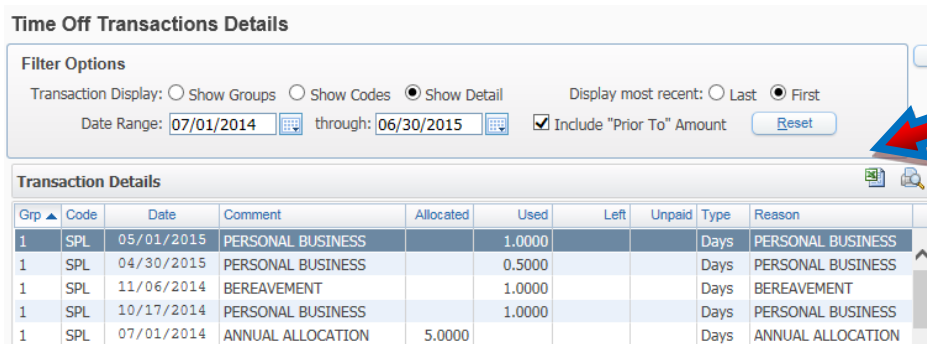
1 SELECT "Employee Profile – Time Off – Transaction Details"



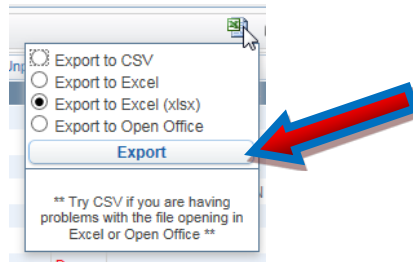
2 SELECT "Date Range"
And APPLY



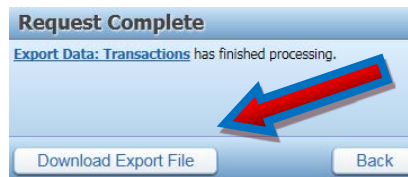
3 CLICK "Excel Icon"



4 SELECT "Export to Excel" – "Export"



5 Click "Download Exported File"



6 All Data is Now Available for
Editing and Reporting

Grp	Code	Date	Comment	Allocated	Used	Left	Unpaid	Type	Reason
1	SPL	05/01/2015	PERSONAL BUSINESS		1			Days	PERSONAL BUSINESS
1	SPL	04/30/2015	PERSONAL BUSINESS		0.5			Days	PERSONAL BUSINESS
1	SPL	11/06/2014	BEREAVEMENT		1			Days	BEREAVEMENT
1	SPL	10/17/2014	PERSONAL BUSINESS		1			Days	PERSONAL BUSINESS
1	SPL	07/01/2014	ANNUAL ALLOCATION	5				Days	ANNUAL ALLOCATION
1	SPL	-----	Prior to 07/01/2014			9		Days	
1	SPL	-----	STATE PERSONAL LEAVE		5	3.5	10.5	Days	
1	-----	-----	STATE LEAVE		5	3.5	10.5	Days	
2	LSL	04/17/2015	ILLNESS		1			Days	ILLNESS
2	LSL	02/25/2015	FAMILY ILLNESS		1			Days	FAMILY ILLNESS
2	LSL	02/02/2015	FAMILY ILLNESS		1			Days	FAMILY ILLNESS
2	LSL	01/30/2015	FAMILY ILLNESS Dr. appt with wife		1			Days	FAMILY ILLNESS
2	LSL	12/18/2014	FAMILY ILLNESS		0.5			Days	FAMILY ILLNESS
2	LSL	11/17/2014	FAMILY ILLNESS		1			Days	FAMILY ILLNESS
2	LSL	09/15/2014	ILLNESS		1			Days	ILLNESS
2	LSL	07/01/2014	ANNUAL ALLOCATION	5				Days	ANNUAL ALLOCATION

V. EXCEL – CONDITIONAL FORMATTING:

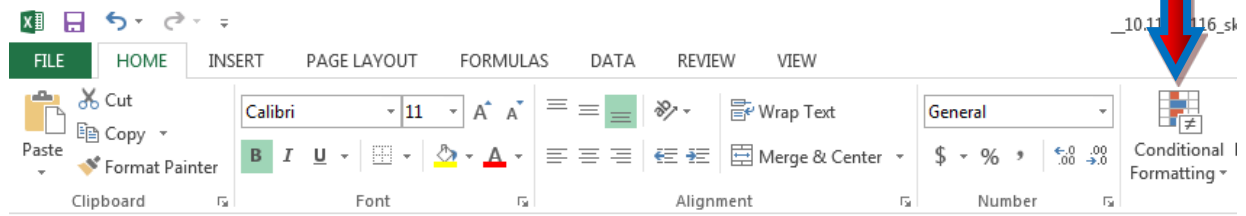
1 AFTER DOWNLOADING DATA TO AN EXCEL SPREADSHEET ...

Place Cursor on Selected Column

SELECT “Conditional Formatting”

SELECT “Highlight Cell Rules”

SELECT “Text that Contains”



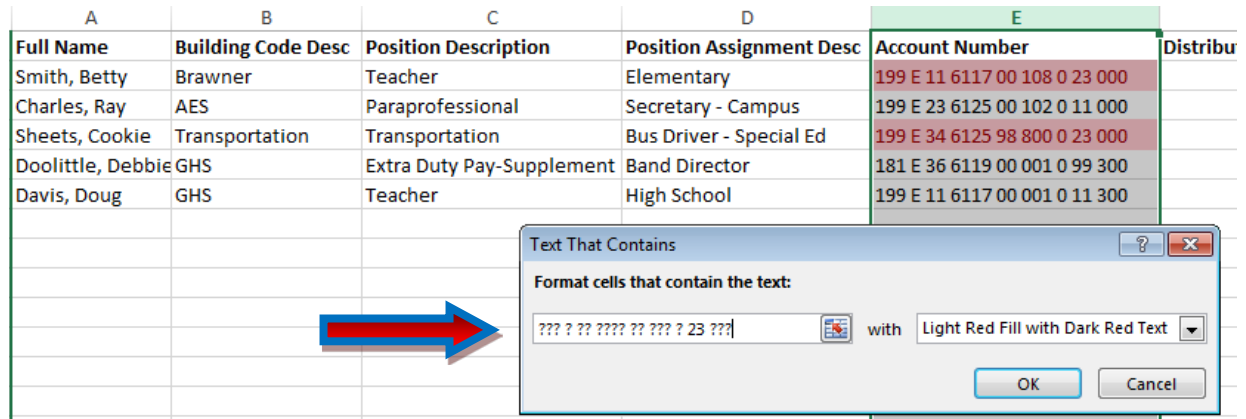
The screenshot shows the Excel interface with the following settings:

- Formulas: E1
- Formula Bar: Account Number
- Column E is selected (highlighted in green).

	A	B	C	D	E	
1	Full Name	Building Code Desc	Position Description	Position Assignment Desc	Account Number	Distrib
2	Smith, Betty	Brawner	Teacher	Elementary	199 E 11 6117 00 108 0 23 000	
3	Charles, Ray	AES	Paraprofessional	Secretary - Campus	199 E 23 6125 00 102 0 11 000	
4	Sheets, Cookie	Transportation	Transportation	Bus Driver - Special Ed	199 E 34 6125 98 800 0 23 000	
5	Doolittle, Debbie	GHS	Extra Duty Pay-Supplement	Band Director	181 E 36 6119 00 001 0 99 300	
6	Davis, Doug	GHS	Teacher	High School	199 E 11 6117 00 001 0 11 300	

2 Enter ??? Marks for Unknown Data and Enter Specific Data for Known Fields ...

This Example is Sorting Special Education Account Codes



The dialog box 'Text That Contains' is configured as follows:

- Format cells that contain the text:** ??? ? ? ? ? ? ? ? ? ? ? 23 ???
- Format Style:** Light Red Fill with Dark Red Text

	A	B	C	D	E	
	Full Name	Building Code Desc	Position Description	Position Assignment Desc	Account Number	Distrib
	Smith, Betty	Brawner	Teacher	Elementary	199 E 11 6117 00 108 0 23 000	
	Charles, Ray	AES	Paraprofessional	Secretary - Campus	199 E 23 6125 00 102 0 11 000	
	Sheets, Cookie	Transportation	Transportation	Bus Driver - Special Ed	199 E 34 6125 98 800 0 23 000	
	Doolittle, Debbie	GHS	Extra Duty Pay-Supplement	Band Director	181 E 36 6119 00 001 0 99 300	
	Davis, Doug	GHS	Teacher	High School	199 E 11 6117 00 001 0 11 300	

3 SELECT “OK” and Sort or Filter Data Retrieved as Desired

Full Name	Building Code Desc	Position Description	Position Assignment Desc	Account Number
Smith, Betty	Brawner	Teacher	Elementary	199 E 11 6117 00 108 0 23 000
Charles, Ray	AES	Paraprofessional	Secretary - Campus	199 E 23 6125 00 102 0 11 000
Sheets, Cookie	Transportation	Transportation	Bus Driver - Special Ed	199 E 34 6125 98 800 0 23 000
Doolittle, Debbie	GHS	Extra Duty Pay-Supplement	Band Director	181 E 36 6119 00 001 0 99 300
Davis, Doug	GHS	Teacher	High School	199 E 11 6117 00 001 0 11 300

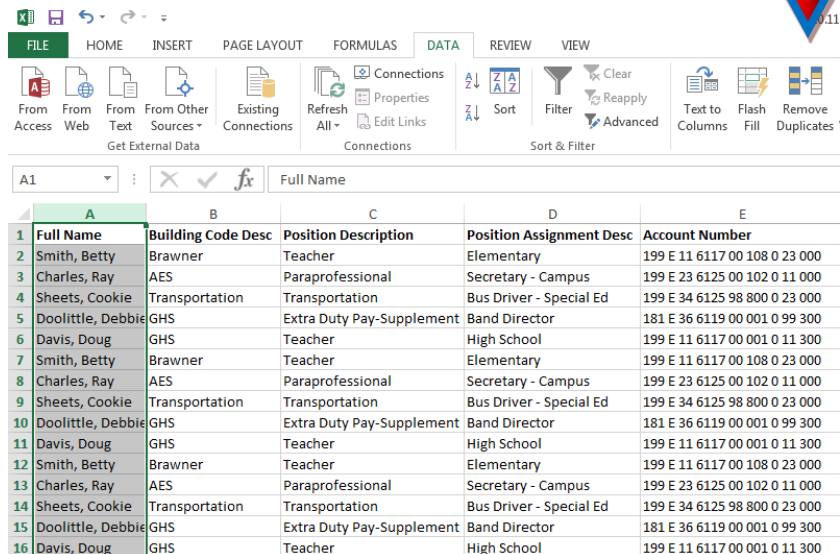
VI. EXCEL – REMOVE DUPLICATES:

1 AFTER DOWNLOADING DATA TO AN EXCEL SPREADSHEET ...

Place Cursor on Selected Column

SELECT “Data”

SELECT “Remove Duplicates”

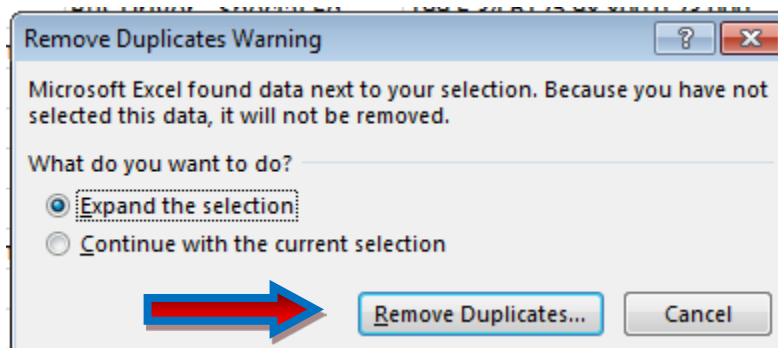


The screenshot shows the Microsoft Excel interface with the 'DATA' tab selected. The ribbon includes options for 'Sort & Filter', 'Text to Columns', 'Flash Fill', and 'Remove Duplicates'. Below the ribbon, a table is displayed with the following data:

	A	B	C	D	E
1	Full Name	Building Code Desc	Position Description	Position Assignment Desc	Account Number
2	Smith, Betty	Brawner	Teacher	Elementary	199 E 11 6117 00 108 0 23 000
3	Charles, Ray	AES	Paraprofessional	Secretary - Campus	199 E 23 6125 00 102 0 11 000
4	Sheets, Cookie	Transportation	Transportation	Bus Driver - Special Ed	199 E 34 6125 98 800 0 23 000
5	Doolittle, Debbie	GHS	Extra Duty Pay-Supplement	Band Director	181 E 36 6119 00 001 0 99 300
6	Davis, Doug	GHS	Teacher	High School	199 E 11 6117 00 001 0 11 300
7	Smith, Betty	Brawner	Teacher	Elementary	199 E 11 6117 00 108 0 23 000
8	Charles, Ray	AES	Paraprofessional	Secretary - Campus	199 E 23 6125 00 102 0 11 000
9	Sheets, Cookie	Transportation	Transportation	Bus Driver - Special Ed	199 E 34 6125 98 800 0 23 000
10	Doolittle, Debbie	GHS	Extra Duty Pay-Supplement	Band Director	181 E 36 6119 00 001 0 99 300
11	Davis, Doug	GHS	Teacher	High School	199 E 11 6117 00 001 0 11 300
12	Smith, Betty	Brawner	Teacher	Elementary	199 E 11 6117 00 108 0 23 000
13	Charles, Ray	AES	Paraprofessional	Secretary - Campus	199 E 23 6125 00 102 0 11 000
14	Sheets, Cookie	Transportation	Transportation	Bus Driver - Special Ed	199 E 34 6125 98 800 0 23 000
15	Doolittle, Debbie	GHS	Extra Duty Pay-Supplement	Band Director	181 E 36 6119 00 001 0 99 300
16	Davis, Doug	GHS	Teacher	High School	199 E 11 6117 00 001 0 11 300

2 SELECT “Expand the selection”

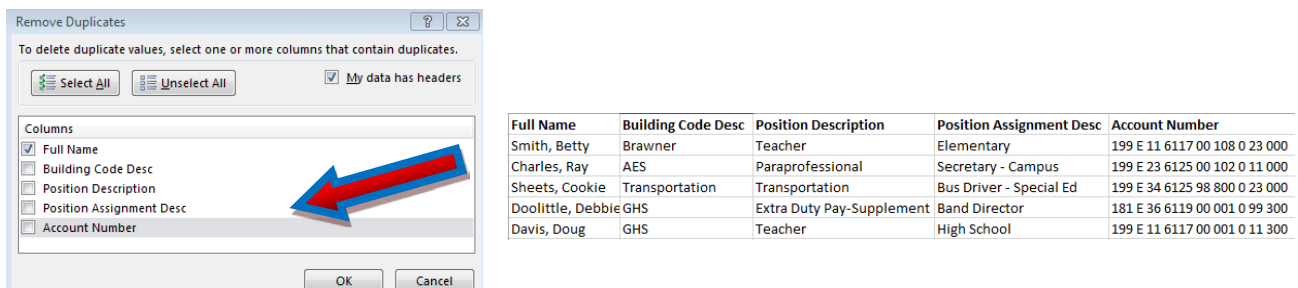
SELECT “Remove Duplicates”



The screenshot shows the 'Remove Duplicates Warning' dialog box. The text reads: 'Microsoft Excel found data next to your selection. Because you have not selected this data, it will not be removed.' Below this, there are two radio button options: 'Expand the selection' (which is selected) and 'Continue with the current selection'. At the bottom, there are 'Remove Duplicates...' and 'Cancel' buttons. A red arrow points to the 'Remove Duplicates...' button.

3 SELECT ONLY the Column Where You Want Duplicates Removed

SELECT “OK” to Remove Selected Duplicates and Receive Desired Data to Edit, Sort, Etc.



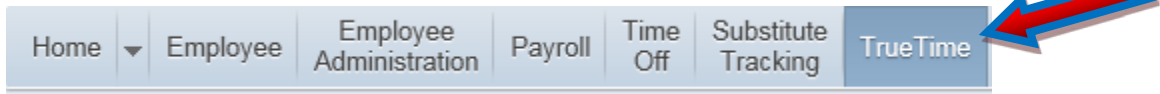
The screenshot shows the 'Remove Duplicates' dialog box. The text reads: 'To delete duplicate values, select one or more columns that contain duplicates.' Below this, there are 'Select All' and 'Unselect All' buttons, and a checked box for 'My data has headers'. In the 'Columns' list, 'Full Name' is selected, while 'Building Code Desc', 'Position Description', 'Position Assignment Desc', and 'Account Number' are unselected. At the bottom, there are 'OK' and 'Cancel' buttons. A red arrow points to the 'OK' button.

Below the dialog box, the resulting data table is shown:

Full Name	Building Code Desc	Position Description	Position Assignment Desc	Account Number
Smith, Betty	Brawner	Teacher	Elementary	199 E 11 6117 00 108 0 23 000
Charles, Ray	AES	Paraprofessional	Secretary - Campus	199 E 23 6125 00 102 0 11 000
Sheets, Cookie	Transportation	Transportation	Bus Driver - Special Ed	199 E 34 6125 98 800 0 23 000
Doolittle, Debbie	GHS	Extra Duty Pay-Supplement	Band Director	181 E 36 6119 00 001 0 99 300
Davis, Doug	GHS	Teacher	High School	199 E 11 6117 00 001 0 11 300

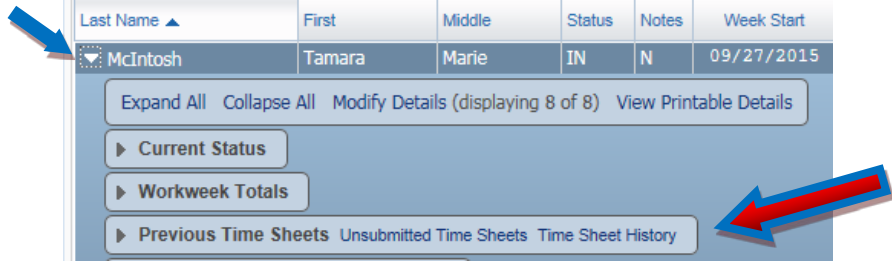
VII. EXCEL – TEXT TO COLUMNS – TIMESHEET HOURS WORKED:

1 SELECT “TrueTime” “Employee by Last Name”



Last Name: ✕

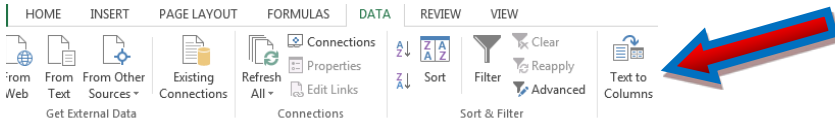
2 EXPAND by Clicking on Arrow and SELECT “Time Sheet History”



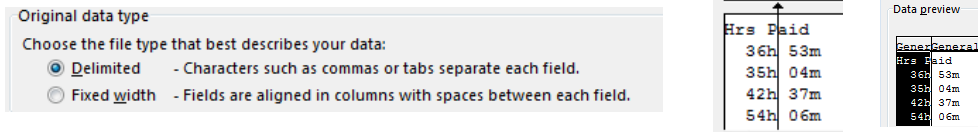
3 SELECT “Excel Icon” - “Export to Excel” - “Export” - “Download Exported File”



4 INSERT Column After Hours Paid – Highlight Column Hours Paid - SELECT “Text to Columns”



5 Select Fixed Width – Next, Next, Finish



6 INSERT Row After Hours Paid – Highlight Column Hours Paid - SELECT “Text to Columns”

D	E	F
Hrs P		
36h		53m
35h		04m
42h		37m
54h		06m

REPEAT STEPS IN #5 ABOVE

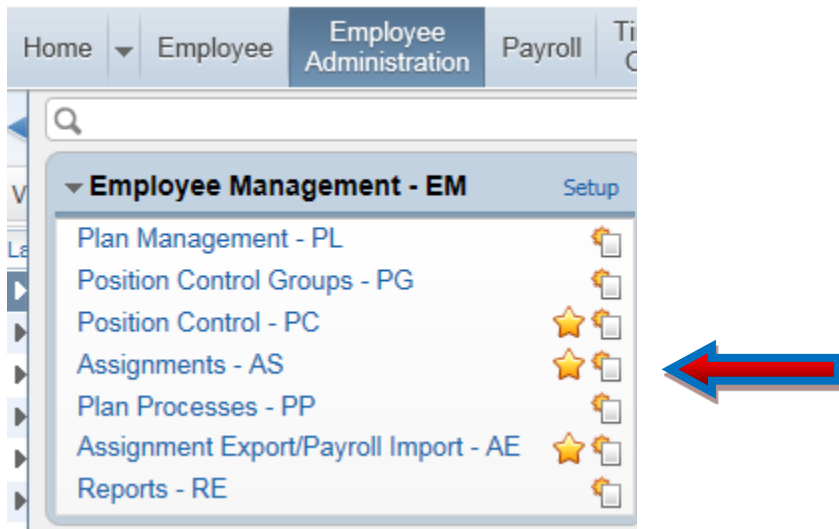
Create a Break Line Between Numbers/h

7 Continue to Repeat Steps Until Hours and Minutes are Separated for Calculating Totals

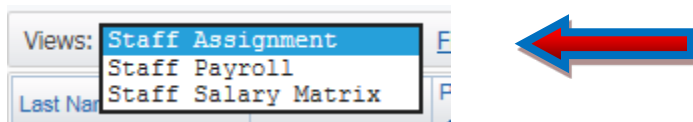
Week Start	Week End	Total Hrs	PAID HOURS	PAID MINUTES	UNPAID HOURS	UNPAID MINUTES
09/20/2015	09/26/2015	36h 53m	36	53		
09/13/2015	09/19/2015	35h 04m	35	4		
09/06/2015	09/12/2015	42h 37m	42	37	8	0
			113	94	8	0

VIII. EXCEL – QUICK REPORT – EMPLOYEE ASSIGNMENTS:

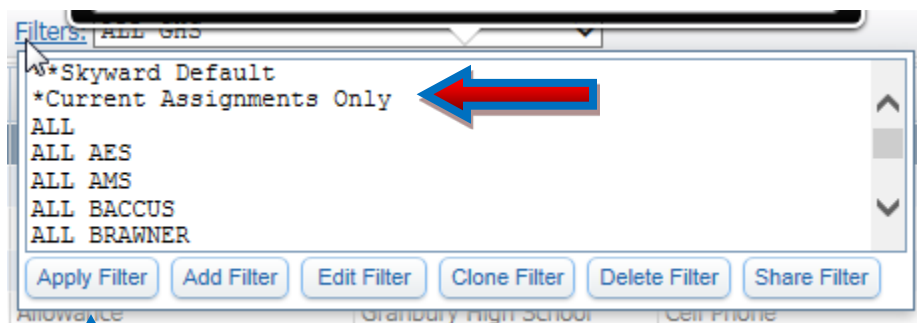
- 1 SELECT “Employee Administration” “Assignments”



- 2 SELECT – Views “Staff Assignment”



- 3 SELECT – Filters “Whatever You Have Created” or “Current Assignments Only”

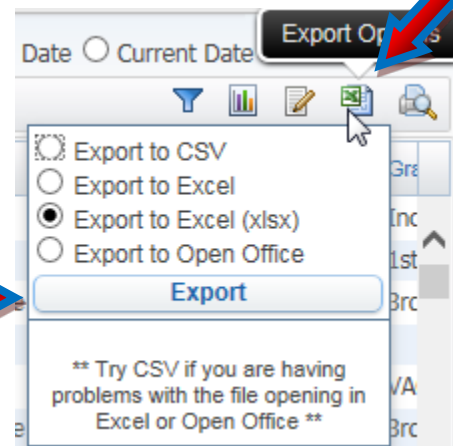


- 4 SELECT – “Apply Filter”

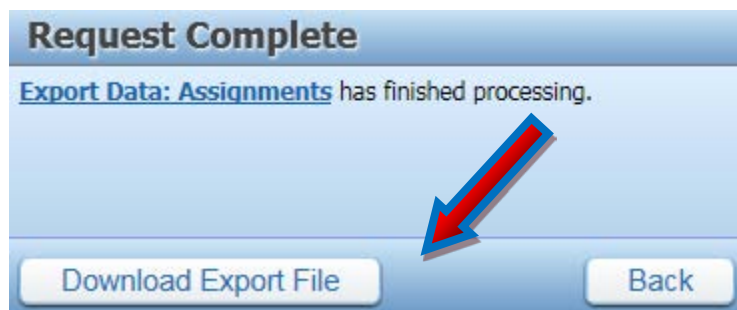


- 5 Click On EXCEL ICON to SELECT “Export to Excel” – “Export”

SELECT EXPORT



- 6 Click “Download Export File”



- 7 Edit Data in Excel as Desired

Last Name	First	Middle	Position	Assignment	Building	Job Type	Department	Calendar
Test Name	Nicole	Michelle	Paraprofessional	Aide- Special Education	Nettie Baccus Elem. Scho	Clerical/Para Gr	Special Educati	187PAR/LVN
Test Name	Pamela	J	Teacher	Elementary	Emma Roberson Elem. Sc	TEACHER/LIBRA	1st Grade	187 TEACH
Test Name	Paula	Yvonne	Teacher	Elementary	Acton Elementary School	TEACHER/LIBRA	3rd Grade	187 TEACH
Test Name	Becky	D	Coach-Other Stipend	Golf Womens	Granbury High School	TEACHER/LIBRA	Golf	187 TEACH
Test Name	Becky	D	Teacher	High School	Granbury High School	TEACHER/LIBRA	Special Educati	187 TEACH
Test Name	Kathleen	Ann	Teacher	Elementary	Acton Elementary School	TEACHER/LIBRA	3rd Grade	187 TEACH
Test Name	Terry	Leonard	Transportation	Bus Driver - Regular	Transportation	Auxiliary Grade	Transportation	175BUS5:00
Test Name	Debra	J	Paraprofessional	Aide - Instructional	Mambrino School	Clerical/Para Gr	PE	187PAR/LVN

This VERY SIMPLE step gives you data reports without using Data Mining.

You may also create and format your FILTERS to provide different data in different formats to further simplify the data collection.