



Texas Skyward User Group Conference

Making the Most of Profile

Jeanne Arbuckle



Making the Most of Profile



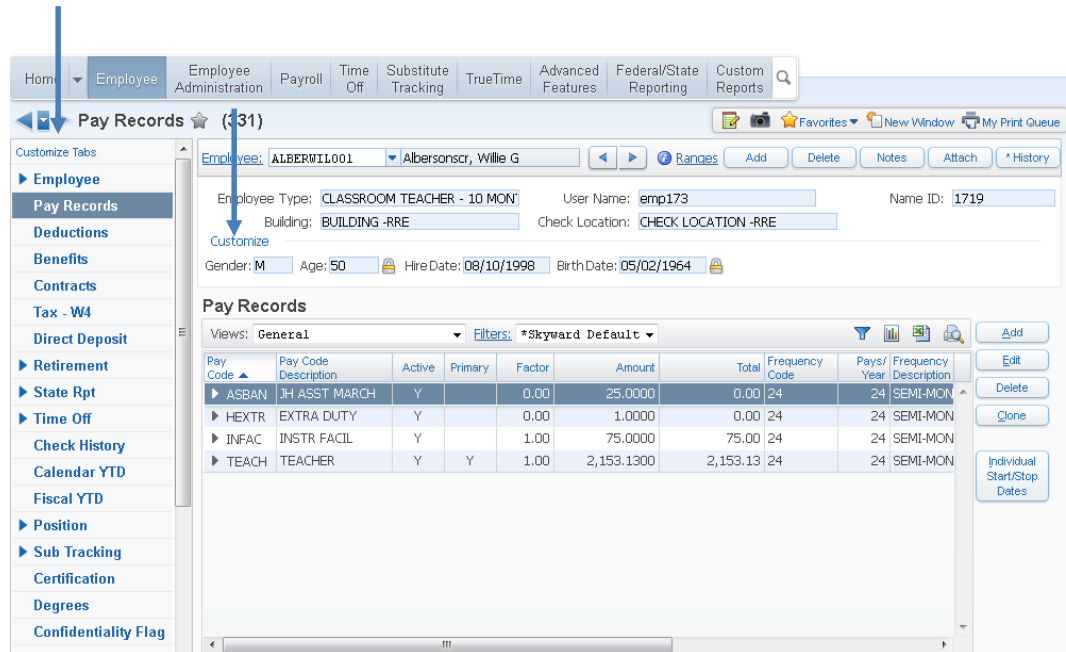
This session demonstrates the power of Employee Profile and Employee Browse. We will discuss:

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

Making the Most of Profile

Employee Profile

- Customize Tabs
- Customize central information area



The screenshot displays the Skyward software interface for an employee profile. The top navigation bar includes tabs for Home, Employee, Employee Administration, Payroll, Time Off, Substitute Tracking, TrueTime, Advanced Features, Federal/State Reporting, and Custom Reports. The main content area is titled 'Pay Records (31)' and shows the profile for 'Alberscr, Willie G' (Employee ID: ALBERMIL001). The profile information includes Employee Type: CLASSROOM TEACHER - 10 MON, User Name: emp173, Name ID: 1719, Building: BUILDING -RRE, Check Location: CHECK LOCATION -RRE, Gender: M, Age: 50, Hire Date: 08/10/1998, and Birth Date: 05/02/1964. A 'Customize' link is visible below the profile information. Below this, the 'Pay Records' section shows a table with 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:

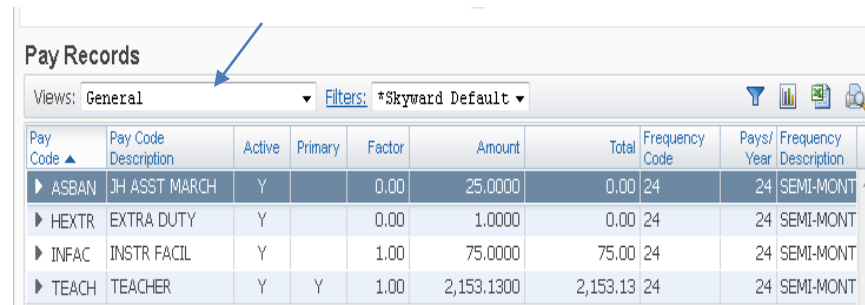
Pay Code	Pay Code Description	Active	Primary	Factor	Amount	Total	Frequency Code	Pays/Year	Frequency Description
ASBAN	JH ASST MARCH	Y		0.00	25.0000	0.00	24	24	SEMI-MON
HEXTR	EXTRA DUTY	Y		0.00	1.0000	0.00	24	24	SEMI-MON
INFAC	INSTR FACIL	Y		1.00	75.0000	75.00	24	24	SEMI-MON
TEACH	TEACHER	Y	Y	1.00	2,153.1300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

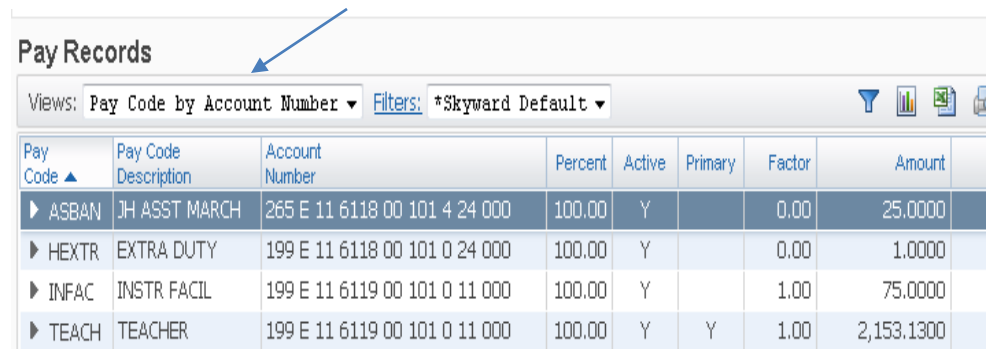


Pay Records

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

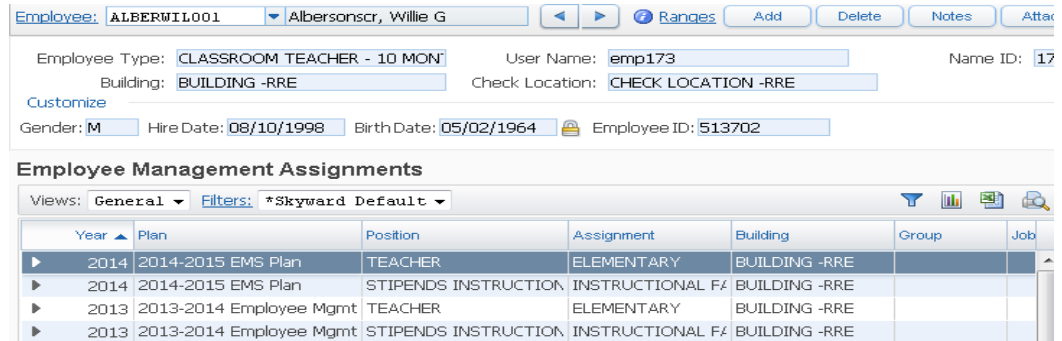
Pay Code	Pay Code Description	Account Number	Percent	Active	Primary	Factor	Amount
ASBAN	JH ASST MARCH	265 E 11 6118 00 101 4 24 000	100.00	Y		0.00	25.0000
HEXTR	EXTRA DUTY	199 E 11 6118 00 101 0 24 000	100.00	Y		0.00	1.0000
INFAC	INSTR FACIL	199 E 11 6119 00 101 0 11 000	100.00	Y		1.00	75.0000
TEACH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

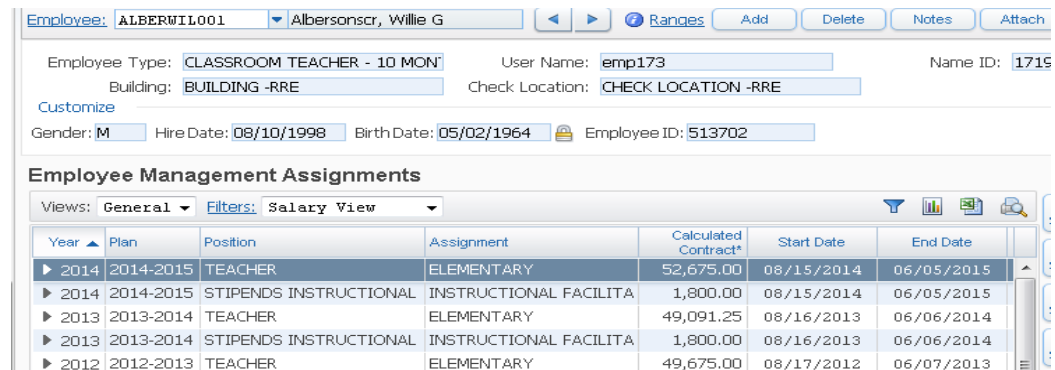
Employee Type: CLASSROOM TEACHER - 10 MON | User Name: emp173 | Name ID: 17
Building: BUILDING -RRE | Check Location: CHECK LOCATION -RRE

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

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

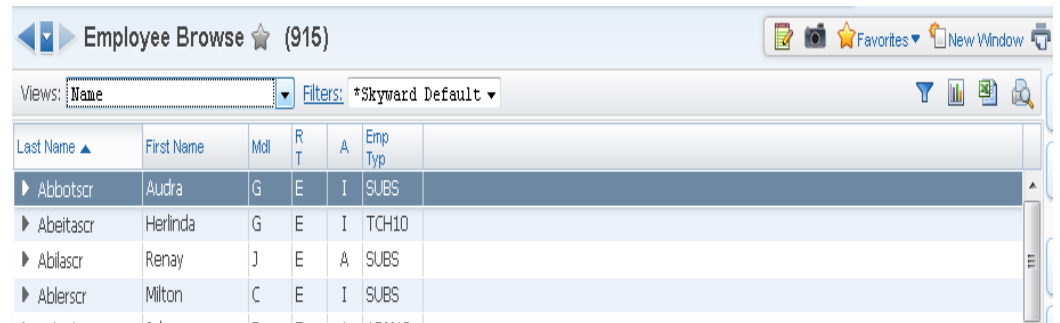
Views: General | Filters: Salary View

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

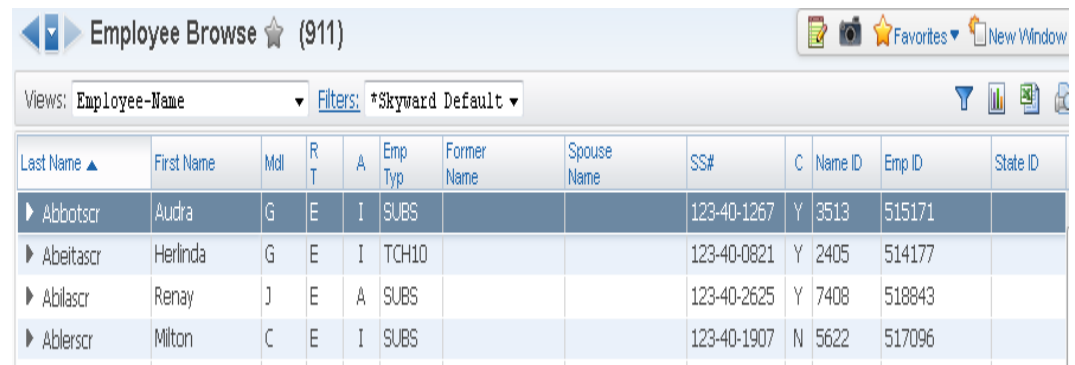
- Here is the default Name view



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



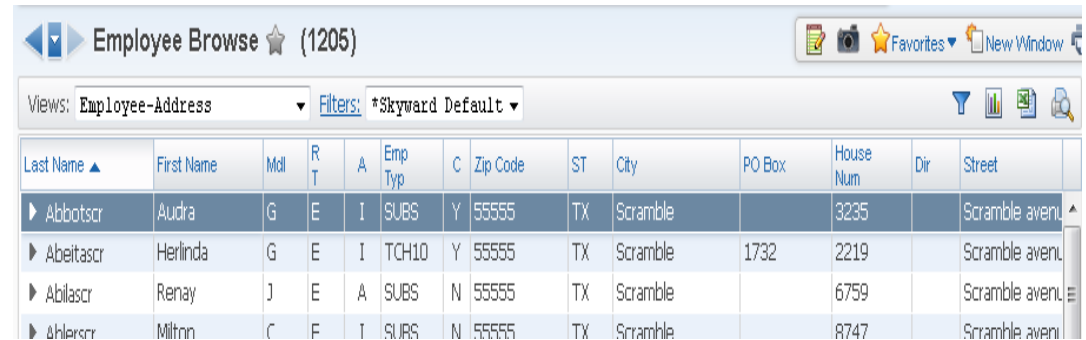
Employee Browse (911) | Views: Employee-Name | Filters: *Skyward Default

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

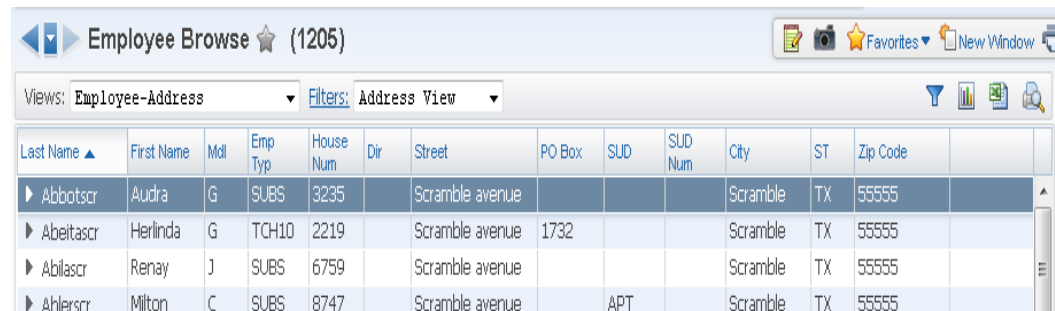
Employee Browse – Select a View and then create customized Filters

- 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:

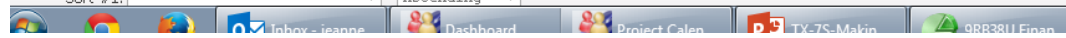
This is a temporary filter. When checked, this filter is deleted the next time you log into Skyward on the web.

Browse Options
 Number of Locked Columns:
 Display Totals Count Only

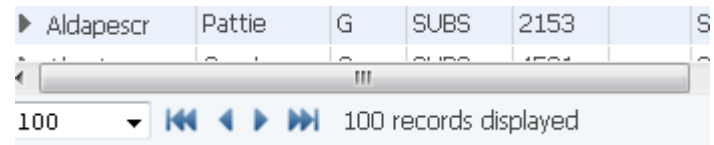
Column Display Options and Filters

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	1521	

100 records displayed



Texas Skyward User Group Conference

THANK YOU FOR ATTENDING!

