



Texas Skyward User Group Conference

Making the Most of Profile

Jeanne Arbuckle



Making the Most of Employee Profile



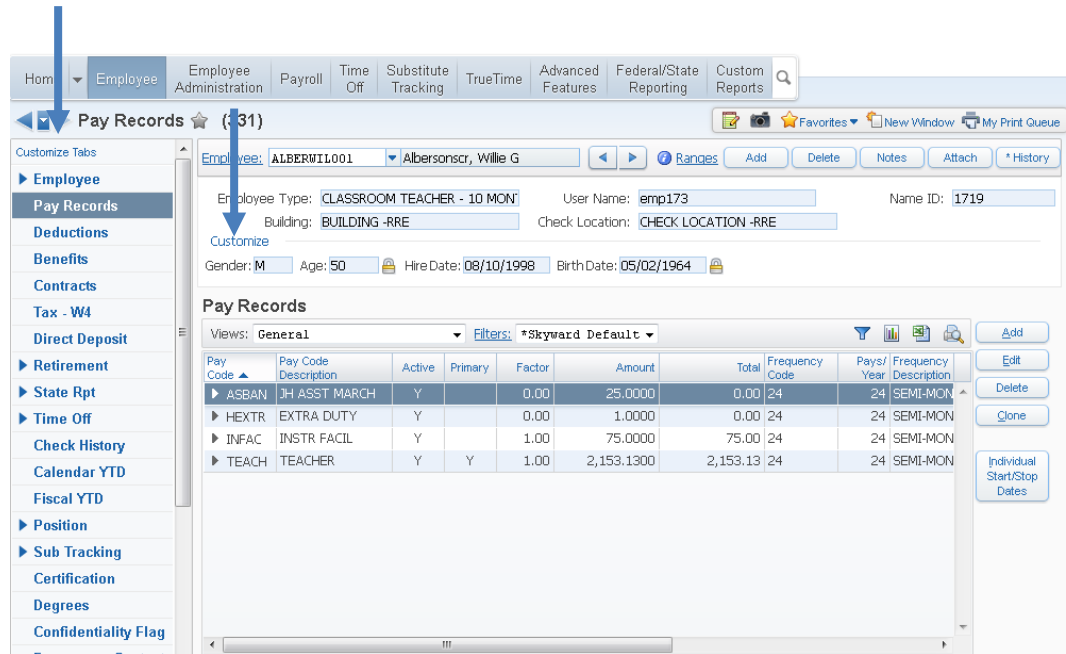
This session demonstrates the power of Employee Profile and Employee Browse. We will discuss:

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

Making the Most of Employee Profile

Employee Profile

- Customize Tabs
- Customize central information area



Employee: ALBERMIL001 | 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 | Age: 50 | Hire Date: 08/10/1998 | Birth Date: 05/02/1964

Pay Records

Views: General | Filters: *Skyward Default

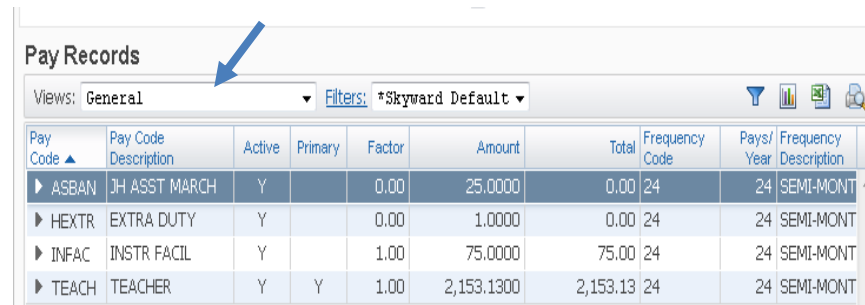
Pay Code	Pay Code Description	Active	Primary	Factor	Amount	Total	Frequency Code	Pays/Year	Frequency Description
ASBAN	JH ASST MARCH	Y		0.00	25.0000	0.00	24	24	SEMI-MON
HEXTR	EXTRA DUTY	Y		0.00	1.0000	0.00	24	24	SEMI-MON
INFAC	INSTR FACIL	Y		1.00	75.0000	75.00	24	24	SEMI-MON
TEACH	TEACHER	Y	Y	1.00	2,153.1300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

Making the Most of Employee Profile

Employee Profile

- Some screens have multiple views you can choose from

- This is the default view

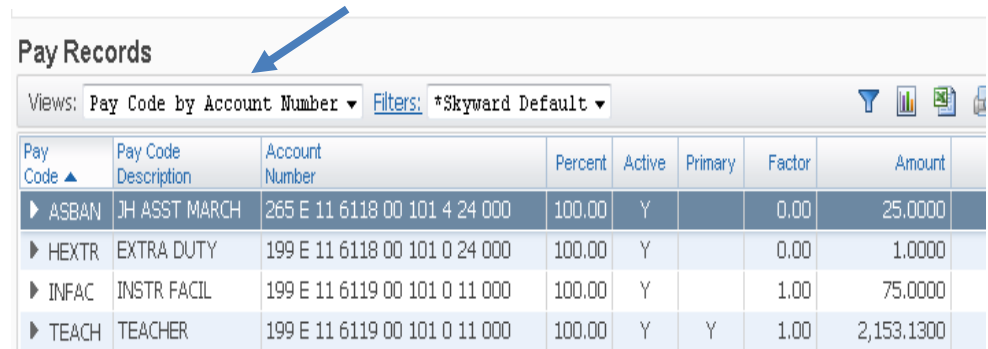


Pay Records

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 Employee 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 INSTRUCTIONAL	INSTRUCTIONAL FACILIT	BUILDING -RRE		
▶ 2013	2013-2014 Employee Mgmt	TEACHER	ELEMENTARY	BUILDING -RRE		
▶ 2013	2013-2014 Employee Mgmt	STIPENDS INSTRUCTIONAL	INSTRUCTIONAL FACILIT	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

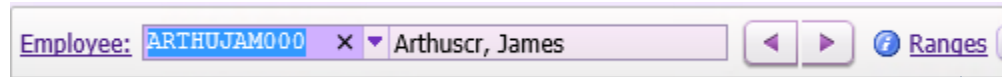
Views: General | Filters: Salary View

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 Employee Profile

Employee Profile

- Employee Search
- Employee Access link
- Employee Ranges



↑
Search

- Advanced Lookup

Employee Access link

- Direct access to EA info

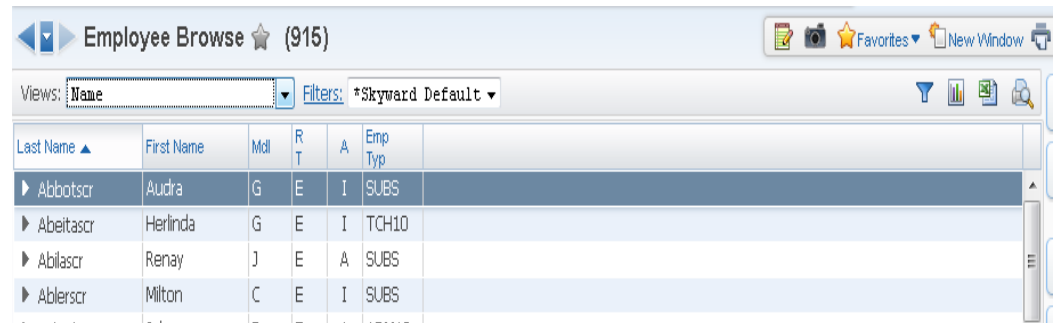
Employee Ranges

- Filter by Building, Check Location, Employee Type, Active/Inactive

Making the Most of Employee Browse

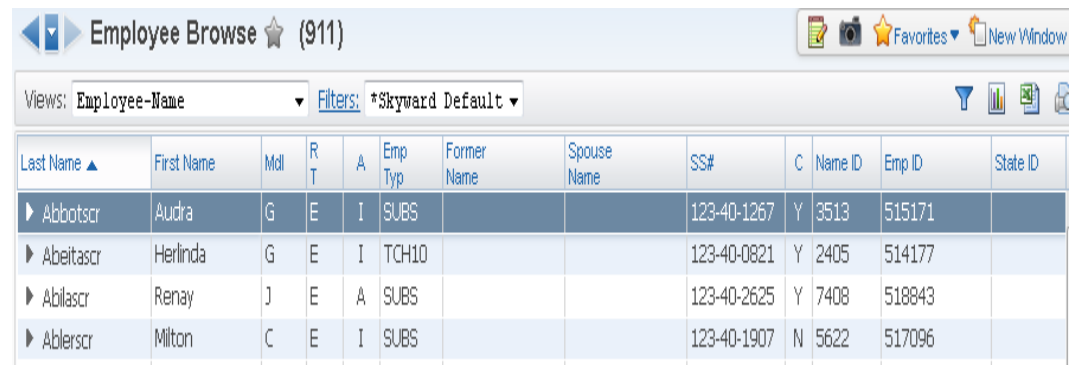
Employee Browse has many different Views to choose from

- Here is the default Name view



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

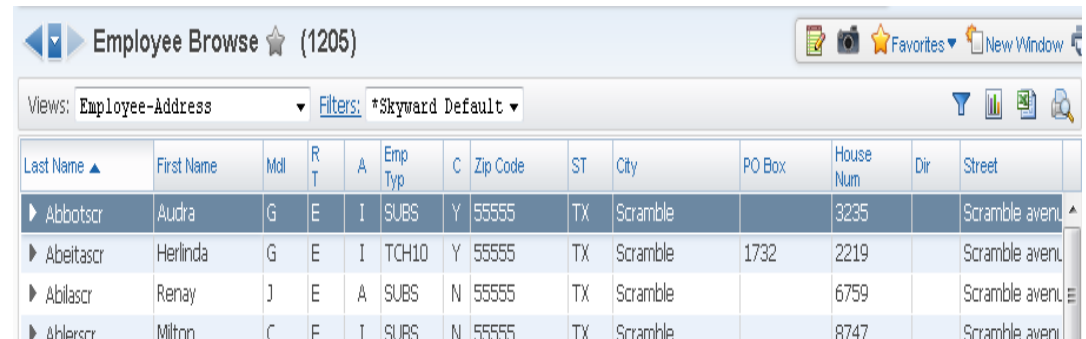


Last Name ▲	First Name	Mdl	R	T	A	Emp Typ	Former Name	Spouse Name	SS#	C	Name ID	Emp ID	State ID
▶ Abbotscr	Audra	G	E	I		SUBS			123-40-1267	Y	3513	515171	
▶ Abeitascr	Herlinda	G	E	I		TCH10			123-40-0821	Y	2405	514177	
▶ Abilascr	Renay	J	E	A		SUBS			123-40-2625	Y	7408	518843	
▶ Ablerscr	Milton	C	E	I		SUBS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

Making the Most of Employee Browse

Employee Browse – Select a View and then create customized Filters

- Here is an example of the default Address View

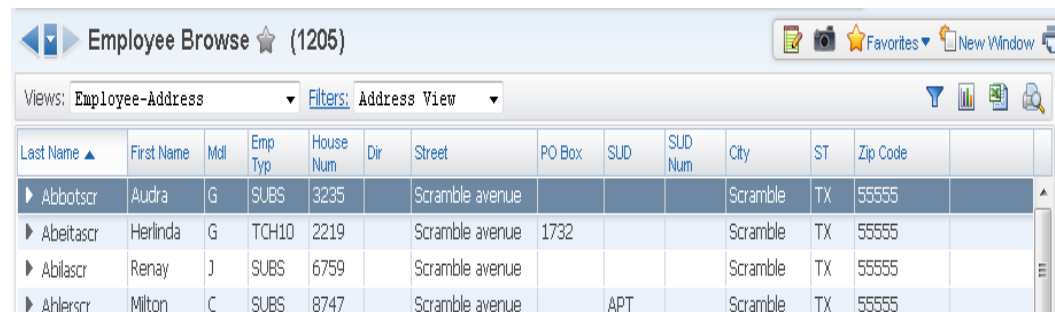


Employee Browse (1205)

Views: Employee-Address Filters: *Skyward Default

Last Name ▲	First Name	Mdl	R	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



Employee Browse (1205)

Views: Employee-Address Filters: Address View

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 Employee Browse



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:

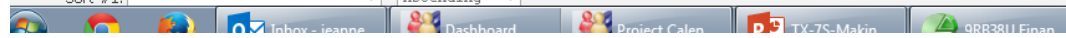
This is a temporary filter. When checked, this filter is deleted the next time you log into Skyward on the web.

Browse Options
 Number of Locked Columns:
 Display Totals Count Only

Column Display Options and Filters

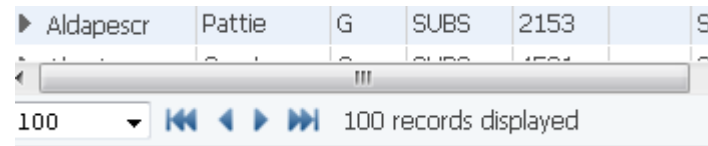
Move	Label	Display	Width	Low Value	High Value	
	Last Name	<input checked="" type="checkbox"/>	84%		ZZZZZZZZZZZZ	Reset
	First Name	<input checked="" type="checkbox"/>	70%		ZZZZZZZZZZZZ	Reset
	Mdl	<input checked="" type="checkbox"/>	100%		ZZZ	
	Emp Typ	<input checked="" type="checkbox"/>	100%		ZZZZ	
	House 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:



Making the Most of Employee Browse

- 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 records displayed



Texas Skyward User Group Conference

THANK YOU FOR ATTENDING!

