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Using the Employee Demographics Quarterly Summary Dashboard



About

The Employee Demographics Quarterly Summary Dashboard provides most recent quarter counts and percentages of employees by self-reported demographic category, agency, division, bureau, job group, and employee type (aka empl type or empl class). It also provides intercomparison of demographic categories and comparison of demographics by workforce segment. Users can utilize drop-down menus built into the dashboard to dynamically sort and drill-down to their scope of interest.

Dashboard Access

1. Connect to the state network by logging onto a computer at a state building or connecting to the VPN remotely.
2. Select the [Employee Demographics Dashboard Hyperlink](#) to navigate to the dashboard with an internet browser. A Tableau Sign In page should appear.
3. Sign in on the page using your IAM credentials to view the dashboard.

The screenshot shows the Tableau sign-in interface. At the top left is the Tableau logo, which consists of a grid of plus signs followed by the word 'tableau' in a lowercase, sans-serif font. Below the logo are two input fields: 'Username' and 'Password'. The 'Username' field contains a single vertical bar character '|'. Below the password field is a blue rectangular button with the text 'Sign In' in white.



You must be connected to the state network or on VPN to view the dashboard.

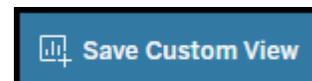
Views

Creating Custom Views

Users can create and save private custom views. As data is updated, custom views will also update.

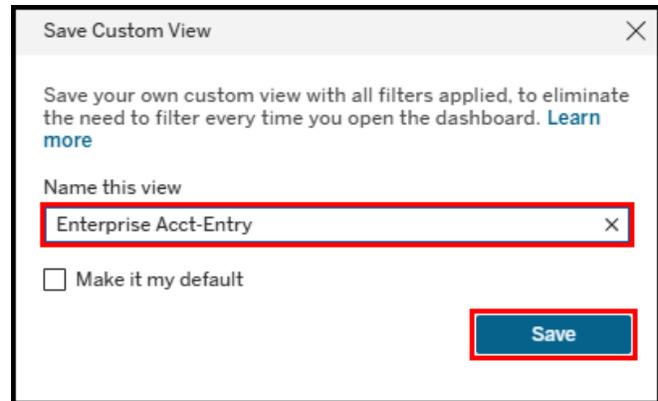
Users should not create custom public views. If you would like to have a private custom view made public and available to all users of the dashboard, please contact [Andrew Geissler](#) in BMRS for review and approval. BMRS will create and manage all public custom view(s).

1. Sort and filter options on a sheet to view relevant data you want captured in the custom view.
2. Select **Save Custom View** from the toolbar above the dashboard.



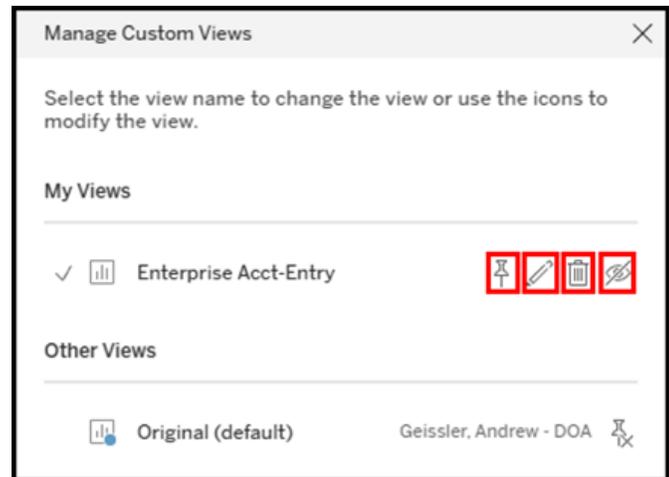


3. On the Save Custom View pop-up, enter a name for the custom view.
 - a. Optional: Select **Make it my default** to set the custom view as your default.
4. Select **Save**.



Managing Custom Views

1. Navigate to the applicable dashboard.
2. Select **View: Original**, or **View: [name of custom view]** if you've set a custom view as default for the dashboard of interest. Your private custom views will be listed under My Views.
3. Select **Manage Views** at the bottom of the Custom Views pop-up.
 - a. Select the pushpin icon to set the view as your default
 - b. Select the pencil icon to revise the name of the custom view.
 - c. Select the trash icon to delete the custom view.
 - d. Do not use the eye icon to change the view from private to public (aka **Make visible to others**), or vice versa.



Resetting Filters and the View

Select the **Revert** button from the toolbar to reset view and all filter actions on a dashboard to the time it was published or if applicable the state the custom view was saved in.



You can also select the **Filter** button next to a field to reset the filter action.



Exporting Crosstab of Data in the View to Excel

The data used to generate a view can be exported to Excel. Summarized data will be exported in crosstab format.

1. Navigate to the applicable dashboard.



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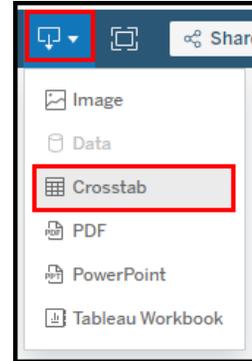


2. Sort and filter options on a sheet to view relevant data you want to export.

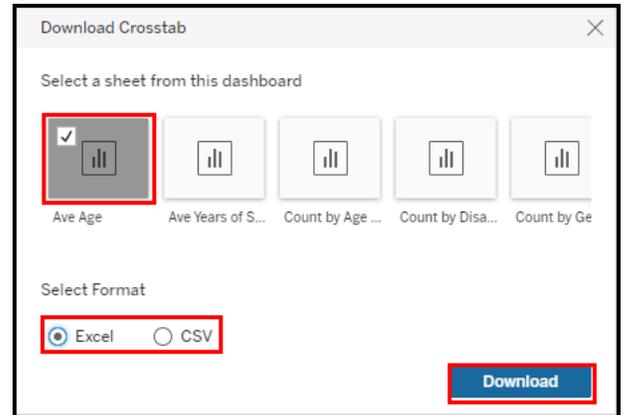


Review your filters each time you export the underlying data to ensure you are viewing from a complete desired list. Only filtered data will be exported.

3. Select the download button and then **Crosstab** from the dropdown menu.



- 4. Select the applicable sheet from the workbook. Hover over the sheet to view the full name.
- 5. Select the format.
- 6. Click **Download**.



Sheets within this Dashboard

There are four distinct "sheets" or tabs within the Employee Demographics Quarterly Summary Dashboard: **Quarterly Summary**, **Comparison of Demographic Category by Workforce Segment**, **Comparison of Two Demographic Categories**, and **Technical Notes**. The first three sheets are linked, and any filters applied to one view will change the data available on the other two sheets.

The **Technical Notes** sheet provides general information about the data used for this dashboard, including what's included and excluded, the effective date, and the extraction date from STAR HCM. Dashboard filters are preset to include permanent employees, where HR Status = "Active", & Pay Status = "Active" OR "Leave with Pay" by default.

Use the tabs at the top of the dashboard to toggle between sheets.

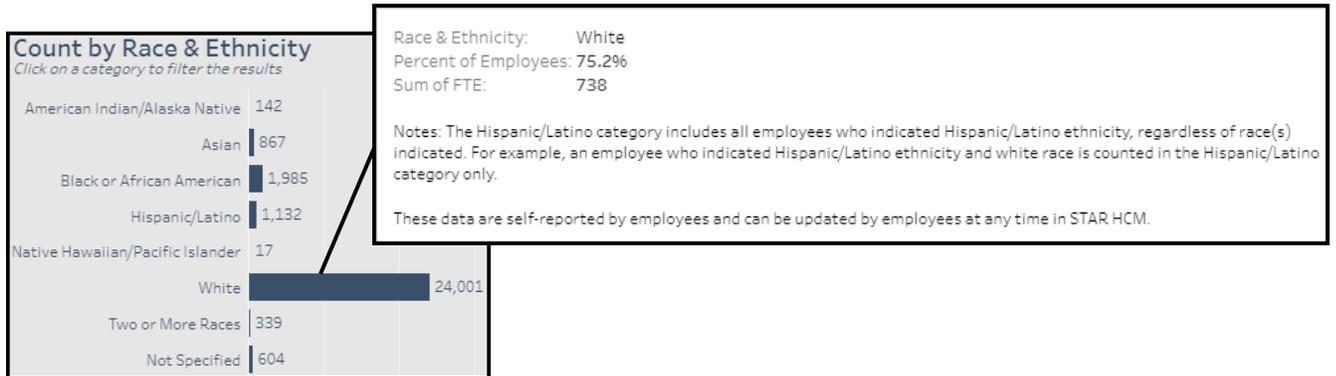




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Hover over a category to view additional data details via tooltip, where available.

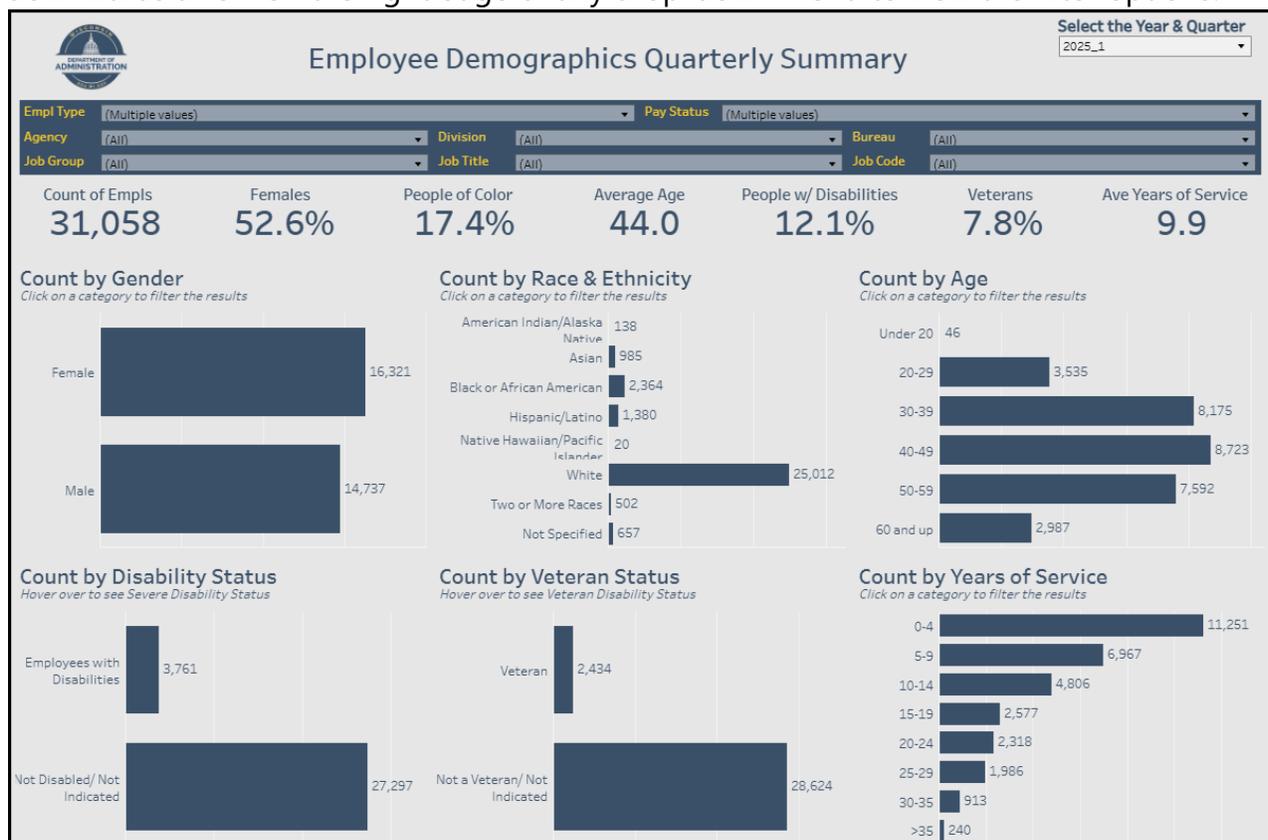


Quarterly Summary by Last

This sheet provides the total count of employees from the selected quarter by self-identified demographic category, and ratios and averages of each category. This sheet is useful for viewing a summary of each demographic category. Users can view by a select category, employee type, pay status, agency, division, bureau, job group, job title, and job code. The bar charts show the overall employee count for each demographic category for the selected quarter.

Drilling-down

1. Use the drop-down menus at the top of the sheet and the bar charts to drill-down to your scope of interest. The view updates automatically after selections are made. Select the downwards arrow on the right edge of any drop-down menu to view the filter options.





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2. Use the **Select the Year & Quarter** drop-down menu to view data for a selected year and quarter.

3. Use the **Empl Type** drop-down menu to view data for elected – unclassified, limited term employee, permanent, project – permanent, project – project, seasonal, unclassified, and unclassified LTE.

4. Use the **Pay Status** drop-down menu to view data for employees with a pay status of active, leave of absence, and leave with pay.

5. Use the **Agency** drop-down menu to view data for individual, multiple, or all agencies.

6. Use the **Division** drop-down menu to view data for individual, multiple, or all divisions.

7. Use the **Bureau** drop-down menu to view data for individual, multiple, or all bureaus.

8. Use the **Job Group** drop-down menu to view data for individual, multiple, or all job groups.

9. Use the **Job Title** drop-down menu to view data for individual, multiple, or all job titles.

10. Use the **Job Code** drop-down menu to view data for individual, multiple, or all job codes.



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11. Select the options you wish to include in the view or select (All) to include all options. These filters are linked and employee types, pay statuses, agencies, divisions, bureaus, job groups, job titles, or job codes listed under any filter will change based on selections made to any of them.

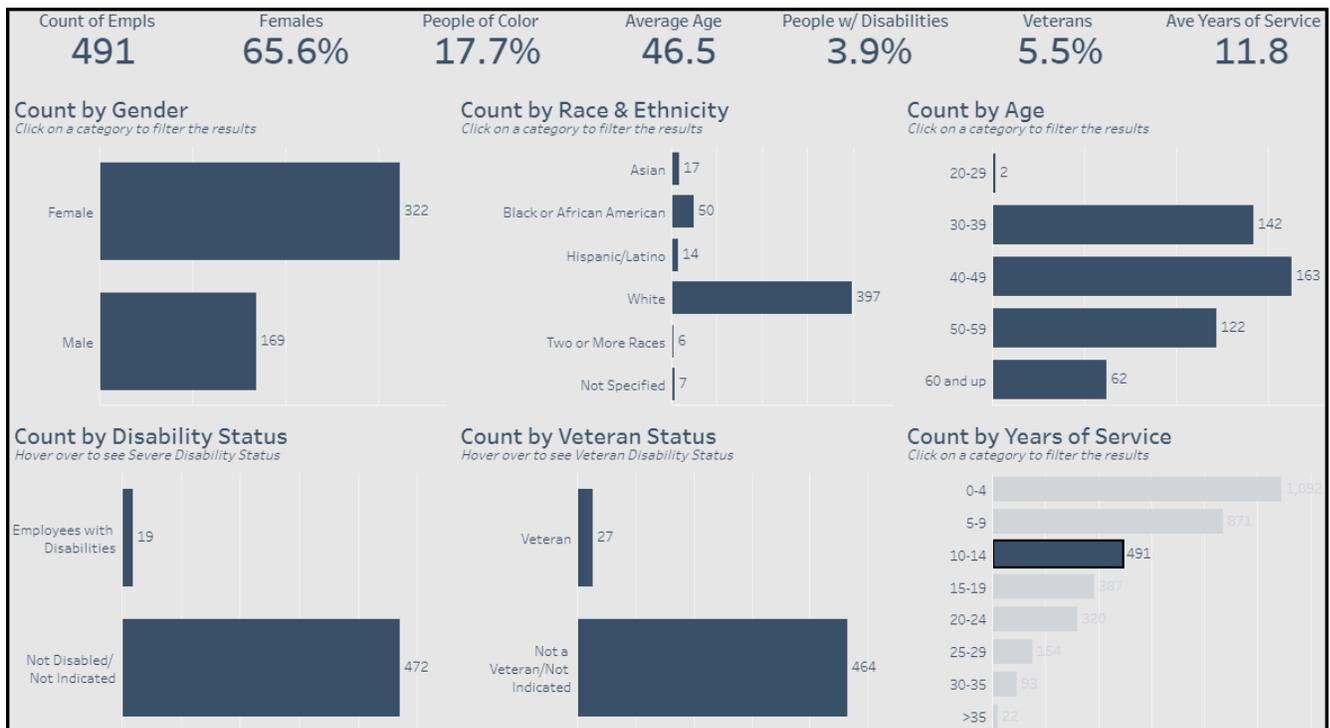
Empl Type	Permanent	Pay Status	Active
Agency	(All)	Division	(All)
Job Group	Business Professionals	Job Title	(Multiple values)
			Job Code
			<input checked="" type="checkbox"/> (All) <input checked="" type="checkbox"/> 10802 <input checked="" type="checkbox"/> 10803 <input checked="" type="checkbox"/> 10804

12. The agency, division, bureau, employee type, job group, job title, and job code filters also allow you to type in the text box above the list of options to find the employee type, agency, division, bureau, job group, job title, or job code of interest quickly.

Job Group (All)

- Health Care Professionals
- Health Care Technicians
- Health Social Services Supv

13. Click on any category to view data for only that category. You can also click on multiple categories to narrow the scope of view further. The counts and ratios at the top of the view will update as categories and filters are applied.



Sort and filter selections are automatically applied to all sheets.



Comparison of Demographic Category by Workforce Segment

This sheet provides a comparison of demographic category employee counts and ratios by workforce segment. This sheet is useful for comparing a demographic category by agency, division, bureau, job group, or empl type (aka Empl Class).

Drilling-down

1. Use the drop-down menus at the top of the sheet to drill-down to your scope of interest. The view updates automatically after selections are made. Select the downwards arrow on the right edge of any drop-down menu to view the filter options.

2. Use the **Select the Year & Quarter** drop-down menu to view data for a selected year and quarter.

3. Use the **Select the Demographics Category** drop-down menu to view data for age category, gender, race & ethnicity, years of service, disability status, veteran status, veteran disability status, or spouse of a veteran disability status.

4. Use the **Select the Workforce Segment** drop-down menu to view data by agency, job group, or empl class.



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5. Use the **Empl Type** drop-down menu to view data for elected – unclassified, limited term employee, permanent, project – permanent, project – project, seasonal, unclassified, and unclassified LTE.

Empl Type	(All)
Job Title	<input checked="" type="checkbox"/> (All)
	<input checked="" type="checkbox"/> Elected - Unclassified
	<input checked="" type="checkbox"/> Limited Term Employee
	<input checked="" type="checkbox"/> Permanent
	<input checked="" type="checkbox"/> Project - Permanent
	<input checked="" type="checkbox"/> Project - Project
	<input checked="" type="checkbox"/> Seasonal
	<input checked="" type="checkbox"/> Unclassified
	<input checked="" type="checkbox"/> Unclassified LTE

6. Use the **Pay Status** drop-down menu to view data for employees with a pay status of active, leave of absence, and leave with pay.

Pay Status	(All)
Job Code	<input checked="" type="checkbox"/> (All)
	<input checked="" type="checkbox"/> Active
	<input checked="" type="checkbox"/> Leave of Absence
	<input checked="" type="checkbox"/> Leave With Pay

7. Use the **Agency** drop-down menu to view data for individual, multiple, or all agencies.

8. Use the **Division** drop-down menu to view data for individual, multiple, or all divisions.

9. Use the **Bureau** drop-down menu to view data for individual, multiple, or all bureaus.

10. Use the **Job Group** drop-down menu to view data for individual, multiple, or all job groups.

11. Use the **Job Title** drop-down menu to view data for individual, multiple, or all job titles.

12. Use the **Job Code** drop-down menu to view data for individual, multiple, or all job codes.



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13. Select the options you wish to include in the view or select (All) to include all options. These filters are linked and employee types, pay statuses, agencies, divisions, bureaus, job groups, job titles, or job codes listed under any filter will change based on selections made to any of them.

Empl Type	Permanent	Pay Status	(All)
Agency	(All)	Division	(All)
Bureau	(All)	Job Group	Admin Support - Fiscal
Job Title	(Multiple values)	Job Code	(All)
			<input checked="" type="checkbox"/> (All)
			<input checked="" type="checkbox"/> 21105
			<input checked="" type="checkbox"/> 21106
			<input checked="" type="checkbox"/> 21311
			<input checked="" type="checkbox"/> 21312

14. The employee type, agency, division, bureau, job group, job title, and job code filters also allow you to type in the text box above the list of options to find the employee type, agency, division, bureau, job group, job title, or job code of interest quickly.

Job Title	(Multiple values)
SS	health serv
	<input type="checkbox"/> ENVIR HEALTH SERVICES SUPV
	<input checked="" type="checkbox"/> HEALTH SERVICES MANAGER
	<input checked="" type="checkbox"/> HEALTH SERVICES MGMT SUPV
	<input checked="" type="checkbox"/> HEALTH SERVICES NURSING COORD
	<input checked="" type="checkbox"/> HEALTH SERVICES SPECIALIST
	<input checked="" type="checkbox"/> HEALTH SERVICES SUPV

Data has been suppressed when filtered selections result in fewer than 10 employee records.

You can use multiple filters together to narrow the scope of the views.

Comparison of Two Demographic Categories

This sheet provides a comparison of employee counts and ratios for any two demographic categories. This sheet is useful for comparing and identifying any potential intersectionality between demographic categories.

Drilling-down

1. Use the drop-down menus at the top of the sheet to drill-down to your scope of interest. The view updates automatically after selections are made. Select the downwards arrow on the right edge of any drop-down menu to view the filter options.

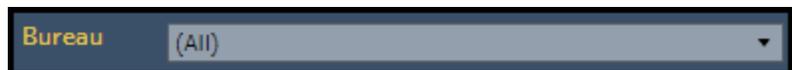
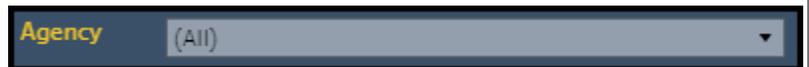
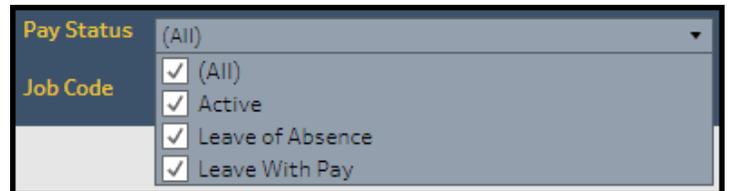
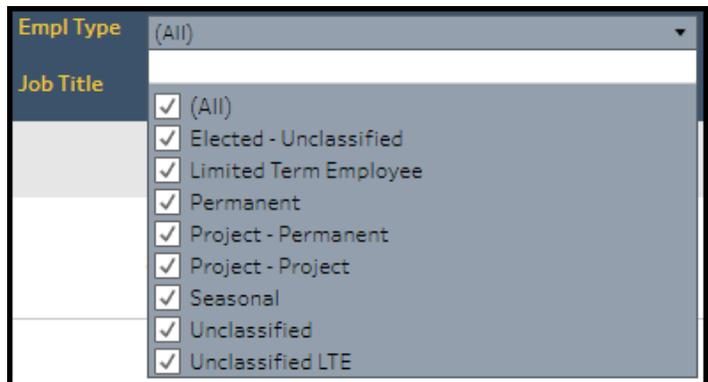
Demographics Category 1 (Columns)		Demographics Category 2 (Rows)	
Gender		Race & Ethnicity	
Empl Type	(Multiple values)	Pay Status	(Multiple values)
Agency	(All)	Division	(All)
Bureau	(All)	Job Group	(All)
Job Title	(All)	Job Code	(All)



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- Use the **Demographics Category 1 (Columns)** drop-down menu to view data for age category, gender, race and ethnicity, years of service, disability status, veteran status, veteran disability status, or spouse of a veteran disability status.
- Use the **Demographics Category 2 (Rows)** drop-down menu to view data by age category, gender, race and ethnicity, years of service, disability status, veteran status, veteran disability status, or spouse of a veteran disability status.
- Use the **Empl Type** drop-down menu to view data for elected – unclassified, limited term employee, permanent, project – permanent, project – project, seasonal, unclassified, and unclassified LTE.
- Use the **Pay Status** drop-down menu to view data for employees with a pay status of active, leave of absence, and leave with pay.
- Use the **Agency** drop-down menu to view data for individual, multiple, or all agencies.
- Use the **Division** drop-down menu to view data for individual, multiple, or all divisions.
- Use the **Bureau** drop-down menu to view data for individual, multiple, or all bureaus.





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9. Use the **Job Group** drop-down menu to view data for individual, multiple, or all job groups.

10. Use the **Job Title** drop-down menu to view data for individual, multiple, or all job titles.

11. Use the **Job Code** drop-down menu to view data for individual, multiple, or all job codes.

12. Select the options you wish to include in the view or select (All) to include all options. These filters are linked and employee types, pay statuses, agencies, divisions, bureaus, job groups, job titles, or job codes listed under any filter will change based on selections made to any of them.

13. The employee type, job group, agency, division, bureau, job title, and job code filters also allow you to type in the text box above the list of options to find the agency, employee type, job group, job title, or job code of interest quickly.

Troubleshooting & Questions

Email [Andrew Geissler](mailto:Andrew.Geissler@BMSR) in BMRS should you experience any technical difficulty accessing the dashboard or if you have questions about using the dashboard.