



## About

The Employee Demographics Dashboard provides most recent quarter counts and percentages of employees by self-reported demographic category, agency, 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.

## Navigation

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 is the Tableau logo. Below it are two input fields: 'Username' and 'Password'. A blue 'Sign In' button is positioned at the bottom of the form.



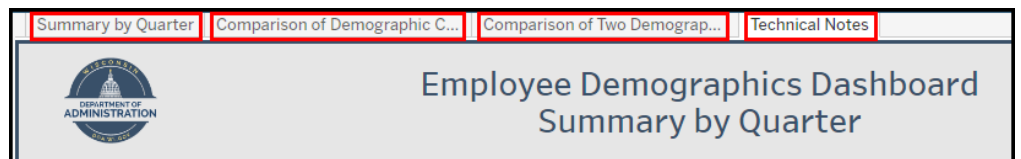
You must be connected to the state network or on VPN to view the dashboard.

## Sheets

There are four distinct "sheets" or tabs within the Employee Demographics Dashboard: **Summary by Last Quarter, 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.

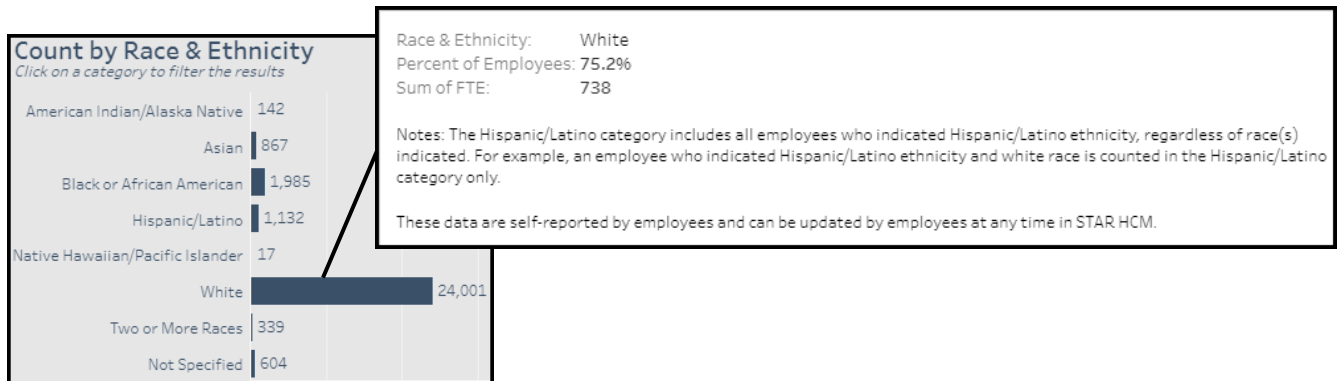
The Technical Notes sheet provides general information about the data used for this dashboard, including what's included and excluded, the effective date, and the extraction date from STAR HCM. Dashboard filters are preset to include permanent employees, where HR Status = "Active", & Pay Status = "Active"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

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





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

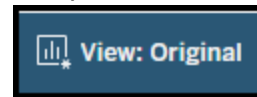


## Creating Custom Views

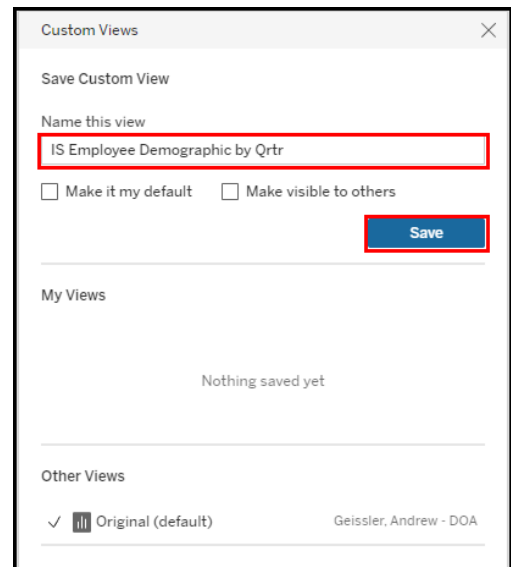
Users can create and save private custom views. As data is updated, custom views will also update.

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).

- Sort and filter options on a sheet to view relevant data you want captured in the custom view.
- Select **View: Original** from the toolbar above the dashboard.



- On the Custom Views pop-up, enter a name for the custom view.
  - Optional: Select **Make it my default** to set the custom view as your default.
  - Do not select **Make visible to others** to make the custom view public.
- Select **Save**.

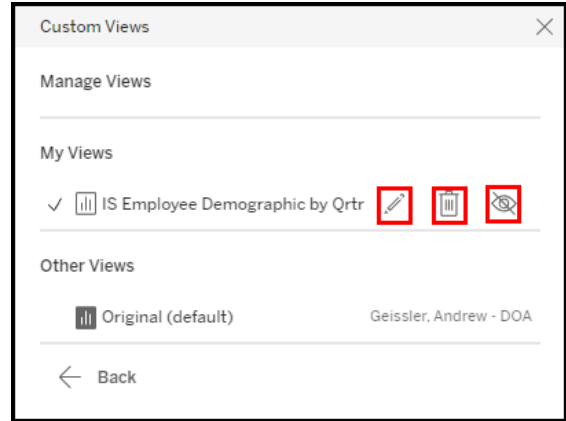


## Managing Custom Views

- Navigate to the applicable dashboard.
- 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 pencil icon to revise the name of the custom view.
  - b. Select the trash icon to delete the custom view.
  - c. Do not use the eye icon to change the view from private to public, or vice versa.



## ***Exporting Crosstab of Data in the View to Excel***

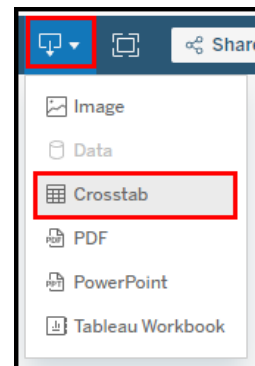
The data used to generate a view can be exported to Excel. Summarized data will be exported in crosstab format.

1. Navigate to the applicable dashboard.
2. Sort and filter options on a sheet to view relevant data you want to export.

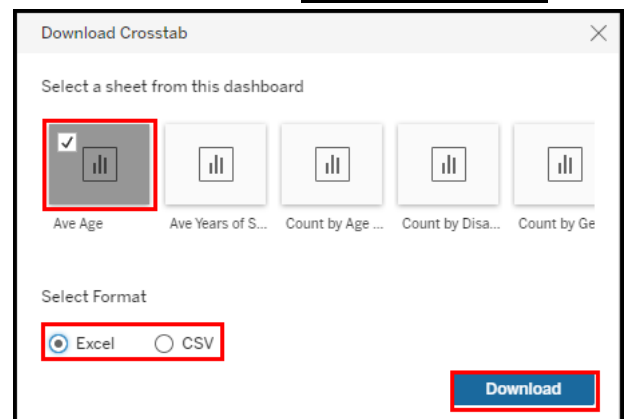


Review your filters each time you export the underlying data to ensure you are viewing from a complete desired list. Only filtered data will be exported.

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**.



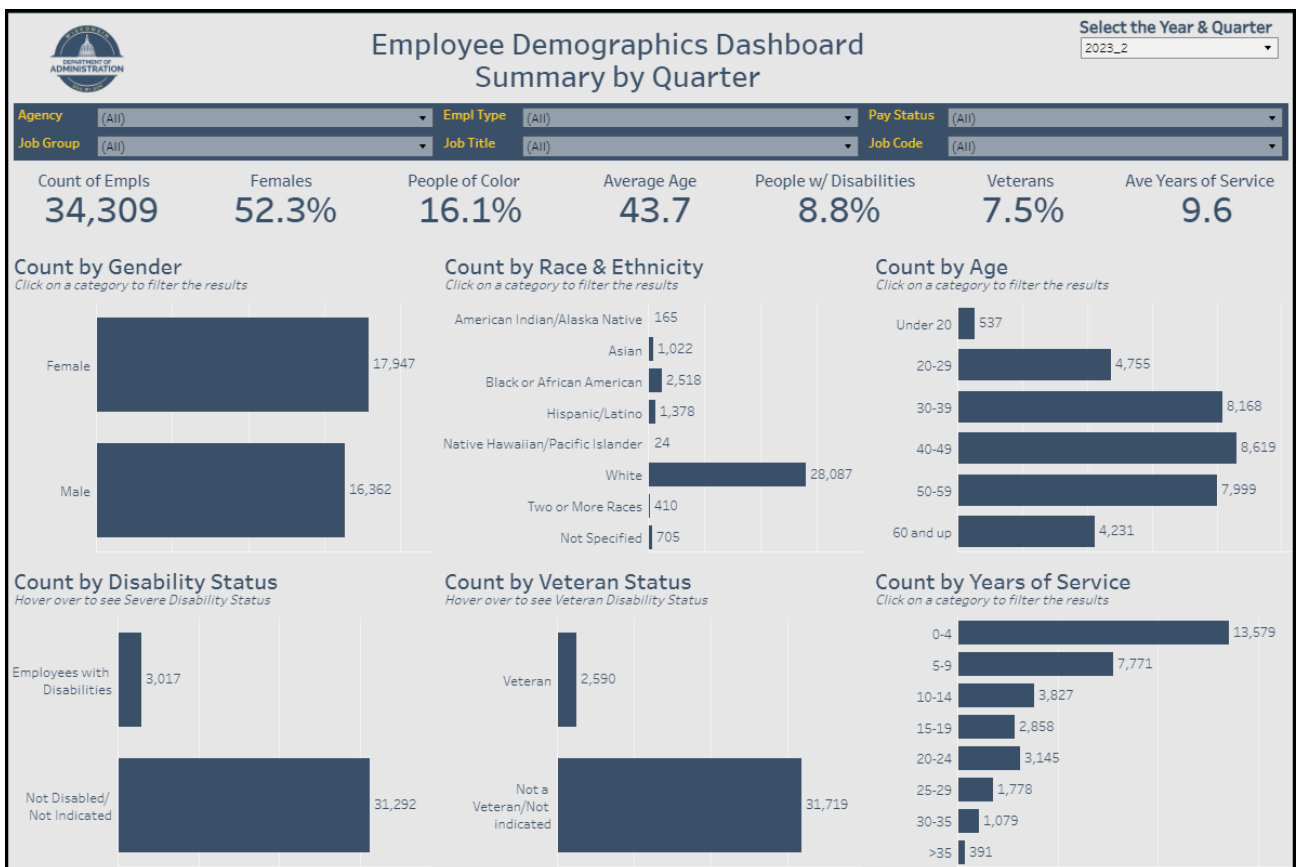


## Summary by Last Quarter

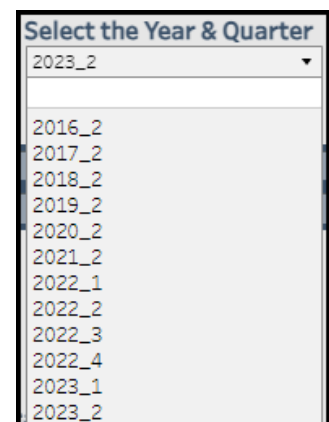
This sheet provides the total count of employees from the selected quarter by self-identified demographic category, and ratios and averages of each category. This sheet is useful for viewing a summary of each demographic category. Users can view by a select category, agency, employee type, pay status, job status, 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.



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





# Using the Employee Demographics Dashboard



- 3. Use the **Agency** drop-down menu to view data for individual, multiple, or all agencies.
- 4. 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.

Agency (All)

Empl Type (All)

Job Title

- (All)
- Elected - Unclassified
- Limited Term Employee
- Permanent
- Project - Permanent
- Project - Project
- Seasonal
- Unclassified
- Unclassified LTE

- 5. 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

- (All)
- Active
- Leave of Absence
- Leave With Pay

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

Job Group (All)

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

Job Title (All)

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

Job Code (All)

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

Agency (All)    Empl Type (All)    Pay Status Active

Job Group Business Professionals    Job Title (Multiple values)    Job Code (All)

Count of Empls <b>111</b>	Females <b>87.4%</b>	People of Color <b>16.2%</b>	Average Age <b>40.2</b>	People w/ Disabilities <b>17.1%</b>
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Count by Gender *Click on a category to filter the results*

Count by Race & Ethnicity *Click on a category to filter the results*

Count by Job Code *Click on a category to filter the results*

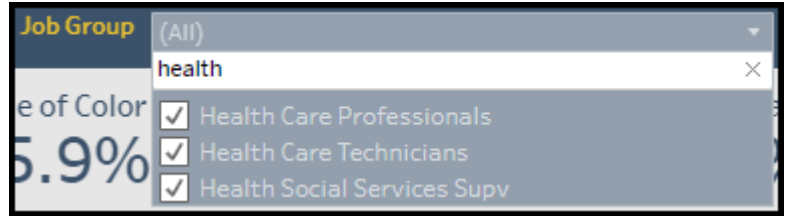
- (All)
- 10802
- 10803
- 10804
- 10902
- 10903
- 10904



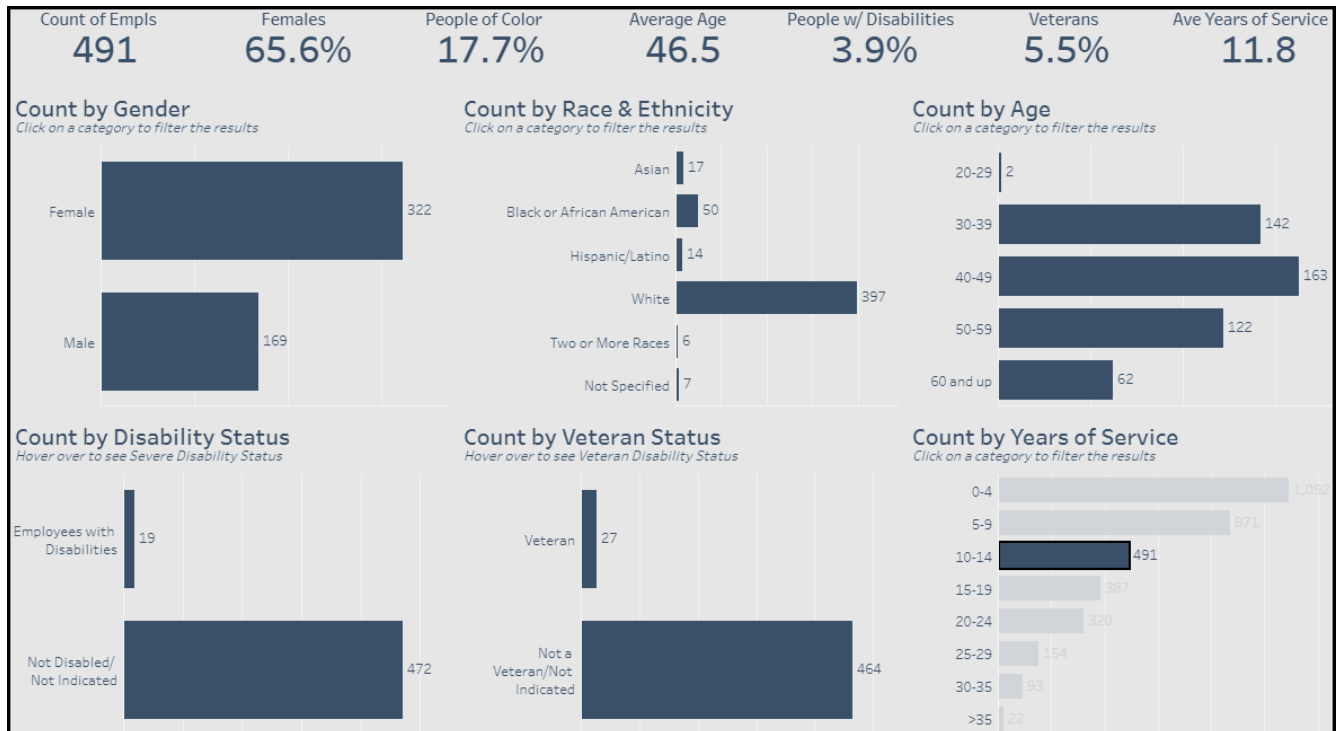
# Using the Employee Demographics Dashboard



10. The agency, 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 agency, employee type, job group, job title, or job code of interest quickly.



11. 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, 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



# Using the Employee Demographics Dashboard



edge of any drop-down menu to view the filter options.

This screenshot shows the top filter bar of the dashboard. It contains two main sections: 'Select the Demographics Category' and 'Select the Workforce Segment'. Under 'Select the Demographics Category', there are dropdowns for 'Years of Service', 'Agency', 'Job Group', 'Empl Type', 'Job Title', and 'Job Code'. Under 'Select the Workforce Segment', there is a dropdown for 'Job Group'. All dropdowns currently show '(All)' as the selected option.

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

This screenshot shows the 'Select the Year & Quarter' dropdown menu. The current selection is '2023\_2'. The menu lists various year and quarter combinations from 2016\_2 to 2023\_2.

- Use the **Select the Demographics Category** 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.

This screenshot shows the 'Select the Demographics Category' dropdown menu. The current selection is 'Years of Service'. The menu lists various demographic categories: Age Category, Gender, Race & Ethnicity, Years of Service, Disability Status, Veteran Status, Veteran Disability Status, and Spouse of Veteran Disability Status.

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

This screenshot shows the 'Select the Workforce Segment' dropdown menu. The current selection is 'Job Group'. The menu lists various workforce segments: Agency, Job Group, and Empl Class.

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

This screenshot shows the 'Agency' dropdown menu. The current selection is '(All)'. The menu is currently closed.

- 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.

This screenshot shows the 'Empl Type' dropdown menu. The current selection is '(All)'. The menu lists various employment types with checkboxes: (All), Elected - Unclassified, Limited Term Employee, Permanent, Project - Permanent, Project - Project, Seasonal, Unclassified, and Unclassified LTE. All checkboxes are currently checked.



# Using the Employee Demographics Dashboard



7. 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.

A screenshot of the 'Pay Status' dropdown menu. The menu is open, showing the following options with checkboxes: (All), Active, Leave of Absence, and Leave With Pay. All checkboxes are checked.

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

A screenshot of the 'Job Group' dropdown menu. The menu is open, showing the option (All).

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

A screenshot of the 'Job Title' dropdown menu. The menu is open, showing the option (All).

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

A screenshot of the 'Job Code' dropdown menu. The menu is open, showing the option (All).

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

A screenshot of the Employee Demographics Dashboard filters. The filters are: Agency (All), Empl Type (Permanent), Pay Status (All), Job Group (All), Job Title (Multiple values), and Job Code (All). The Job Group dropdown menu is open, showing the following options with checkboxes: (All), Administrators-Senior Exec, Health Social Services Supv, Mid-Level Supervisors, and Social Services Professionals. All checkboxes are checked.

12. The agency, 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 agency, employee type, job group, job title, or job code of interest quickly.

A screenshot of the 'Job Title' dropdown menu. The menu is open, showing a search box with the text 'health serv'. Below the search box, the following options are listed with checkboxes: ENVIR HEALTH SERVICES SUPV, HEALTH SERVICES MANAGER, HEALTH SERVICES MGMT SUPV, HEALTH SERVICES NURSING COORD, HEALTH SERVICES SPECIALIST, and HEALTH SERVICES SUPV. All checkboxes are checked.

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.

The screenshot shows the top of the dashboard with two main sections: 'Demographics Category 1 (Columns)' and 'Demographics Category 2 (Rows)'. Under Category 1, there are dropdowns for 'Years of Service', 'Agency', 'Job Group', 'Empl Type', 'Job Title', and 'Job Code'. Under Category 2, there is a dropdown for 'Gender'. All dropdowns currently show '(All)' as the selected option.

2. 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.

This screenshot shows the 'Demographics Category 1 (Columns)' dropdown menu expanded. The options listed are: Years of Service, Age Category, Gender, Race & Ethnicity, Years of Service, Disability Status, Veteran Status, Veteran Disability Status, and Spouse of Veteran Disability Status.

3. 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.

This screenshot shows the 'Demographics Category 2 (Rows)' dropdown menu expanded. The options listed are: Gender, Age Category, Gender, Race & Ethnicity, Years of Service, Disability Status, Veteran Status, Veteran Disability Status, and Spouse of Veteran Disability Status.

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

This screenshot shows the 'Agency' dropdown menu with '(All)' selected.

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.

This screenshot shows the 'Empl Type' dropdown menu expanded. The options listed are: (All), Elected - Unclassified, Limited Term Employee, Permanent, Project - Permanent, Project - Project, Seasonal, Unclassified, and Unclassified LTE. Each option has a checked checkbox next to it.



# Using the Employee Demographics Dashboard



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  
 (All)  
 Active  
 Leave of Absence  
 Leave With Pay

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

Job Group (All)

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

Job Title (All)

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

Job Code (All)

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

Agency (All) | Empl Type Permanent | Pay Status (All)  
 Job Group (All) | Job Title (Multiple values) | Job Code (All)

Employees' Years of Service by Gender					
	0-4	5-9	10-14	15-19	20-24
25					

Job Code (All)  
 (All)  
 6050  
 88250  
 51303  
 51320  
 51330

11. The agency, 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 agency, employee type, job group, job title, or job code of interest quickly.

Job Title (None)  
 human resources sp  
 EXEC HUMAN RESOURCES SPEC  
 EXEC HUMAN RESOURCES SPEC-ADV  
 EXEC HUMAN RESOURCES SPEC-SEN  
 HUMAN RESOURCES SPEC  
 HUMAN RESOURCES SPEC-ADV  
 HUMAN RESOURCES SPEC-SEN

## Troubleshooting & Questions

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