## *About*

The Separations Dashboard provides yearly separation counts and rates by agency and job classification (aka class). It also provides employee-level separation details. Users can utilize radio buttons and drop-down menus built into the dashboard to dynamically sort and drill-down to their scope of interest.

Separation Types are determined by Action and Reason Codes utilized in the State of Wisconsin's human capital management system, STAR HCM. Reason codes are grouped by the following separation types:

| Separation Type | Separation Reason |
|---|---|
| Total Separations | Death |
| | Involuntary |
| | Layoff |
| | Retirement |
| | Voluntary |
| Non-Retirement Separations | Death |
| | Involuntary |
| | Layoff |
| | Voluntary |
| Retirement Separations | Retirement |
| Total Separations (Excluding Death) | Involuntary |
| | Layoff |
| | Retirement |
| | Voluntary |
| Voluntary & Involuntary Separations | Involuntary |
| | Voluntary |
| Voluntary & Retirement Separations | Retirement |
| | Voluntary |
| Voluntary Separations | Voluntary |
| Involuntary Separations | Involuntary |
| Death | Death |
| Seasonal/Temp Layoffs | Layoff |

# Using the Separations Dashboard

## 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 Separations 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.

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

## Sheets

There are six distinct "sheets" or tabs within the Separations Dashboard: **Separations from State Service by Agency, Separations from State Service by Class Title, All Separations: Data Detail, Separations from State Service for Select Unclassified Titles, Select Unclassified Titles: Data Detail and Technical Notes**. The first five sheets are linked, and any filters applied to separation type, agency, job group, class code, or class title on one sheet will change on the other 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.

| By Agency | By Class Title | Data Detail | UNC by Class Title | UNC Data Detail | Technical Notes |

### Separations from State Service by Agency

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

#### Total Separations by Calendar Year

| Class Title | Class Code | Show by Agency | | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 (YTD) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Grand Total | | | # Separations | 5 | 6 | 6 | 8 | 3 | 7 | 15 | 4 |
| | | | Avg EEs per qtr | 54 | 62 | 65 | 69 | 71 | 73 | 76 | 82 |
| | | | % Separation | 9.3% | 9.7% | 9.2% | 11.6% | 4.2% | 9.6% | 19.7% | 4.9% |
| HUMAN RESOURCES SPEC | 10802 | | # Separations | 2 | 1 | 0 | 1 | 1 | 2 | 5 | 0 |
| | | | Avg EEs per qtr | 13 | 18 | 20 | 11 | 16 | 15 | 20 | 21 |
| | | | % Separation | 15.4% | 5.6% | 0.0% | 9.1% | 6.3% | 13.3% | 25.0% | 0.0% |
| HUMAN RESOURCES SPEC-SEN | 10803 | | # Separations | 3 | 5 | 6 | 7 | 2 | 5 | 10 | 4 |
| | | | Avg EEs per qtr | 41 | 44 | 45 | 58 | 56 | 57 | 56 | 61 |
| | | | % Se | | | | | | | | 6.6% |

In 2019, the Total Separations Rate for HUMAN RESOURCES SPEC-SEN (10803) was 12.1%

| Voluntary Separation to Affiliate | 4 |
|---|---|
| Voluntary Separation | 1 |
| Retirement | 2 |
| Grand Total | 7 |

## 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 **View: Original** from the toolbar above the dashboard.
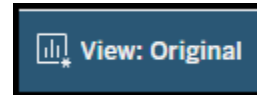
3. On the Custom Views pop-up, enter a name for the custom view.
   a. Optional: Select **Make it my default** to set the custom view as your default.

   b. Do not select **Make visible to others** to make the custom view public.

4. Select **Save.**
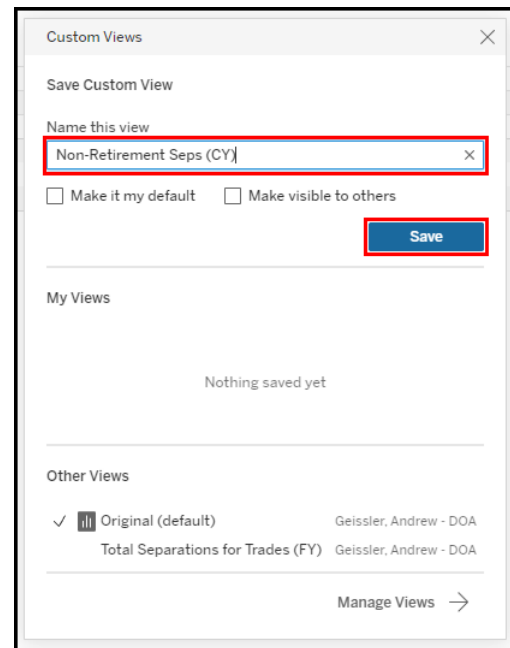
## Managing Custom Views

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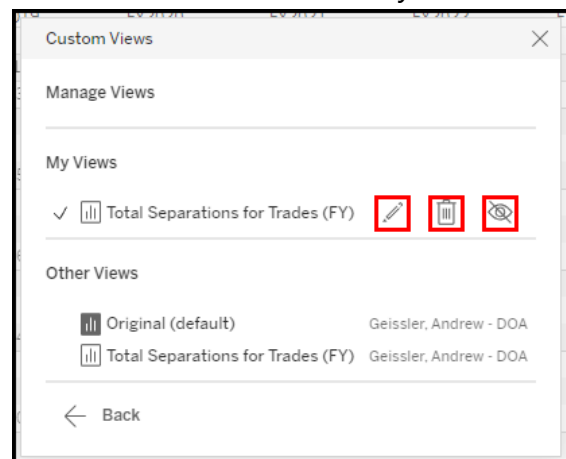
### *Exporting Crosstab of Data in the View to Excel*

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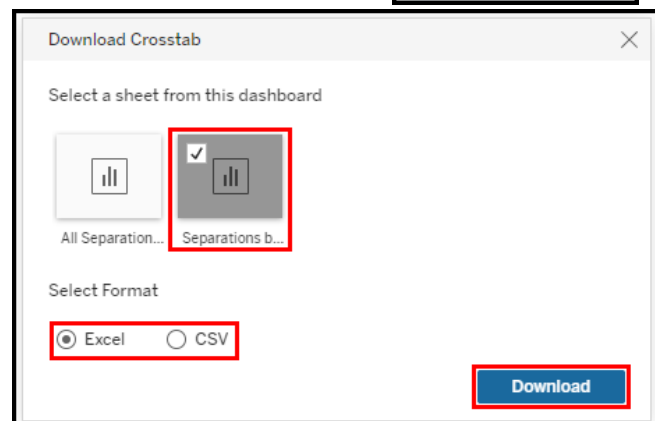
⚠ Review your filters each time you export the underlying data to ensure you are viewing from a complete desired list. Only filtered data will be exported.

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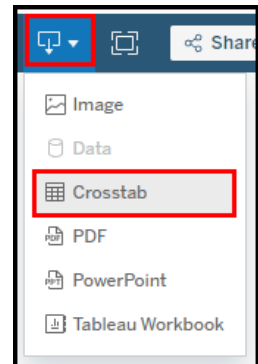


4. Select the applicable sheet from the workbook. Hover over the sheet to view the full name.
5. Select the format.
6. Click **Download**.



### *Separations from State Service by Agency*

This sheet provides the total count of separations, average count of employees per quarter, and separation rate by agency by year. This sheet is useful for viewing a summary of separation activity. Users can toggle between calendar and fiscal year. The line chart on the right changes as different filters and toggles are applied and shows the overall separation rates for the enterprise over time.

### *Drilling-down*

1. Use the radio buttons and drop-down menus at the top of the sheet to sort and filter options to drill-down to your scope of interest. The view updates automatically after selections are

made. Select the downwards arrow on the right of any drop-down menu to view the sort and filter options.

| Calendar Type | Filter by Separation Type | Filter by Agency | Filter by Job Group | Filter by Class Code | Filter by Class Title |
|---|---|---|---|---|---|
| ⦿ Calendar Year<br>○ Fiscal Year | Total Separations ▾ | (All) ▾ | (All) ▾ | (All) ▾ | (All) ▾ |

2. Use the **Select Calendar Type** radio buttons to view data by calendar or fiscal year.

> Calendar Type
> ⦿ Calendar Year
> ○ Fiscal Year

3. Use the **Filter by Separation Type** drop-down menu to view data by total separations, non-retirement separations, retirement separations, total separations (excluding death), voluntary & involuntary separations, voluntary & retirement separations, voluntary separations, involuntary separations, or death.

> Filter by Separation Type
> Total Separations ▾
> Total Separations
> Non-Retirement Separations
> Retirement Separations
> Total Separations (Excluding Death)
> Voluntary & Involuntary Separations
> Voluntary & Retirement Separations
> Voluntary Separations
> Involuntary Separations
> Death Separations
> Seasonal/Temp Layoffs

4. Use the **Filter by Agency, Filter by Job Group, Filter by Class Code, or Filter by Class Title** to view data for a single agency, job group, class code, or class title or to view data for multiple or all agencies, job groups, class titles, or class codes.

| Filter by Agency | Filter by Job Group | Filter by Class Code | Filter by Class Title |
|---|---|---|---|
| (All) ▾ | (All) ▾ | (All) ▾ | (All) ▾ |

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

| Filter by Agency | Filter by Job Group | Filter by Class Code | Filter by Class Title |
|---|---|---|---|
| (All) ▾ | (All) ▾ | 00205 ▾ | AUDITOR-ADV ▾ |

> ☑ (All)
> ☑ Administration
> ☑ Children and Families
> ☑ Employee Trust Funds
> ☑ Health Services
> ☑ Justice
> ☑ Transportation
> ☑ Veterans Affairs
> ☑ Workforce Development

6. The agency, job group, class code, and class title filters also allow you to type in the text box above the list of options to find the agency, job groups, or classifications of interest quickly.

> Filter by Class 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

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

## Separations from State Service by Class Title and
## Separations from State Service for Select Unclassified Titles

These sheets provide the total count of separations, average count of employees per quarter, and separation rate by job class by year. These sheets are useful for viewing a summary of separation activity. Users can view by agency and toggle between calendar and fiscal year. The line chart on the right changes as different filters and toggles are applied and shows the overall separation rates for the enterprise over time.

The Separations from State Service for Select Unclassified Titles sheet includes data for only the following class titles: assistant district attorney, assistant state public defender-attorney confidential, assistant state public defender-attorney supervisor, deputy district attorney, or deputy district attorney supervisor.

## Drilling-down

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

| Calendar Type | Sort by | Show by Agency | Filter by Separation Type | Filter by Agency | Filter by Job Group | Filter by Class Code | Filter by Class Title |
|---|---|---|---|---|---|---|---|
| ⦿ Calendar Year | Class Title ▼ | Off ▼ | Total Separations ▼ | (All) ▼ | (All) ▼ | (All) ▼ | (All) ▼ |
| ○ Fiscal Year | | | | | | | |

2. Use the **Select Calendar Type** radio buttons to view data by calendar or fiscal year.

3. Use the **Sort by** drop-down menu to sort the data by class title or class code.

4. Use the **Show by Agency** drop-down menu to sort the data by agency.
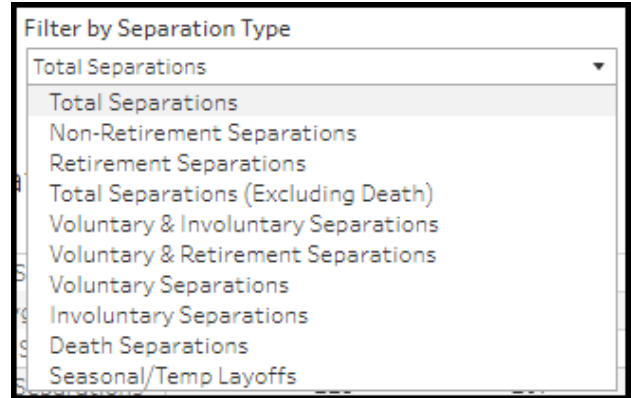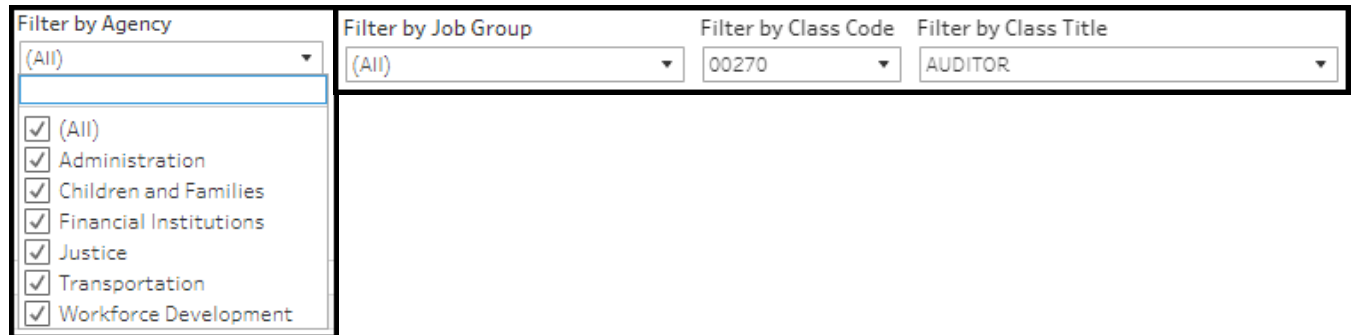
5.  Use the **Filter by Separation Type** drop-down menu to view data by total separations, non-retirement separations, retirement separations, total separations (excluding death), voluntary & involuntary separations, voluntary & retirement separations, voluntary separations, involuntary separations, or death.
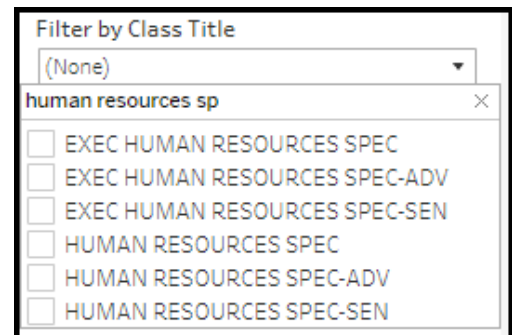
> Filter by Separation Type
> Total Separations ▼
> Total Separations
> Non-Retirement Separations
> Retirement Separations
> Total Separations (Excluding Death)
> Voluntary & Involuntary Separations
> Voluntary & Retirement Separations
> Voluntary Separations
> Involuntary Separations
> Death Separations
> Seasonal/Temp Layoffs

6.  Use the **Filter by Agency, Filter by Job Group, Filter by Class Code, or Filter by Class Title** to view data for a single agency, job group, class title, or class code or to view data for multiple or all agencies, job groups, class titles, or class codes.

> Filter by Agency | Filter by Job Group | Filter by Class Code | Filter by Class Title
> (All) ▼ | (All) ▼ | (All) ▼ | (All) ▼

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

> Filter by Agency | Filter by Job Group | Filter by Class Code | Filter by Class Title
> (All) ▼ | (All) ▼ | 00270 ▼ | AUDITOR ▼
>
> ☑ (All)
> ☑ Administration
> ☑ Children and Families
> ☑ Financial Institutions
> ☑ Justice
> ☑ Transportation
> ☑ Workforce Development

8.  The agency, job group, class code, and class title filters also allow you to type in the text box above the list of options to find the classifications or agency of interest quickly.

> Filter by Class 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

> 💡 Sort and filter selections are automatically applied to all sheets.

## *All Separations: Data Detail and Select Unclassified Titles: Data Detail*

These sheets provide employee-level separation details including employee ID, classification code and title, separation type, and year of separation. These sheets are useful for viewing the details of each separation that occurred.

The Select Unclassified Titles: Data Detail sheet includes data for only the following class titles: assistant district attorney, assistant state public defender-attorney confidential, assistant state public defender-attorney supervisor, deputy district attorney, or deputy district attorney supervisor.

## *Drilling-down*

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

| Calendar Type | Sort by | Show by Agency | Filter by Separation Type | | Filter by Agency | Filter by Job Group | Filter by Class Code | Filter by Class Title |
|---|---|---|---|---|---|---|---|---|
| ⦿ Calendar Year | Class Title ▾ | Off ▾ | Total Separations | ▾ | (All) ▾ | (All) ▾ | (All) ▾ | (All) ▾ |
| ○ Fiscal Year | | | | | | | | |

2. Use the **Select Calendar Type** radio buttons to view data by calendar or fiscal year.

3. Use the **Sort by** drop-down menu to sort the data by class title or class code.

4. Use the **Show by Agency** drop-down menu to sort the data by agency.

5. Use the **Filter by Separation Type** drop-down menu to view data by total separations, non-retirement separations, retirement separations, total separations (excluding death), voluntary & involuntary separations, voluntary & retirement separations, voluntary separations, involuntary separations, or death.

6. Use the **Filter by Agency, Filter by Job Group, Filter by Class Code, or Filter by Class Title** to view data for a single agency, job group, class title, or class code or to view data for multiple or all agencies, job groups, class titles, or class codes.

| Filter by Agency | Filter by Job Group | Filter by Class Code | Filter by Class Title |
|---|---|---|---|
| (All) ▾ | (All) ▾ | (All) ▾ | (All) ▾ |

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

Filter by Agency

(All)

- ☑ (All)
- ☑ Administration
- ☑ Children and Families
- ☑ Financial Institutions
- ☑ Justice
- ☑ Transportation
- ☑ Workforce Development

Filter by Job Group: (All)

Filter by Class Code: 00270

Filter by Class Title: AUDITOR

8. The class title, class code, and agency filters also allow you to type in the text box above the list of options to find the classifications or agency of interest quickly.

Filter by Class 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.