

HUMAN RESOURCE DASHBOARD GUIDE

4.0 - 5/11/24

Spreadsheets Reimagined



SpreadWiseCo™

BUILT WITH
MICROSOFT
EXCEL

GUIDE OVERVIEW

These tools are designed to be easy to use, with minimal inputs from you, and many outputs from us. Follow each tool guide closely. There are normally only a few true steps within the guide, but the rest is information to help you along the way.

GUIDE LEGEND


GUIDE POINTERS

NEED TO KNOW

NICE TO KNOW

FOR THOSE READY TO JUMP IN QUICKLY



YOU CAN SKIP AND COME BACK 



DON'T SKIP!

USER INPUTS

INPUT BOX

DROP DOWN MENU

REVISION INFORMATION

Latest HR Dashboard Revision:
4.0

PASSWORD

- Tabs are locked to prevent accidental formula errors. Password: "swc"
- Use with discretion. Formulas and setups can be complex and highly integrated.

1 - GETTING STARTED



THIS JOURNEY BEGINS WITH BUILDING YOUR EMPLOYEE LIST

EMPLOYEE LIST

All Time

Hired
4
Average Tenure Yrs
5.50

For Date Range

From	Hired
1/1/23	1
To	Avg Tenure Yrs
3/1/24	0.95

#	EmployeeID #	Name	Location (State)	Date Of Hire	Job Title	Status	Vacation Earned	Tenure		
								Days	Weeks	Years
1	1000200	Bob Winston	CA	6/1/23	Electrical Engineer	Terminated	2 Weeks	345	49.3	0.95
2	1000201	Kevin Michaels	SC	11/1/19	Contractor	Active	2 Weeks	1653	236.1	4.53
3	1000202	Michael Seth	NH	11/5/22	Steel Worker	Active	2 Weeks	553	79.0	1.52
4	1000203	Sara Lucy	GA	5/14/09	Business Development Lead	Active	6 Weeks	5476	782.3	15.00
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										

• Built With
Microsoft Excel

• NOT Optimized For Use
With **Google Sheets**



SpreadWiseCo

2 - EMPLOYEE LIST



ADD YOUR CURRENT EMPLOYEE LIST DETAILS:

- ID #
- NAME
- LOCATION
- DATE OF HIRE
- JOB TITLE

USE THE DROP DOWN MENU TO SELECT EACH EMPLOYEE VACATION EARNED AMOUNT

“STATUS” & “TENURE” DETAILS ARE AUTOMATIC, BASED ON INPUTS FROM OTHER TABS

EMPLOYEE LIST

All Time

Hired
4
Average Tenure Yrs
5.50

For Date Range

From	Hired
1/1/23	1
To	Avg Tenure Yrs
3/1/24	0.95

#	EmployeeID #	Name	Location (State)	Date Of Hire	Job Title	Status	Vacation Earned	Tenure		
								Days	Weeks	Years
1	1000200	Bob Winston	CA	6/1/23	Electrical Engineer	Terminated	2 Weeks	345	49.3	0.95
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3	1000202	Michael Seth	NH	11/5/22	Steel Worker	Active	2 Weeks	553	79.0	1.52
4	1000203	Sara Lucy	GA	5/14/09	Business Development Lead	Active	6 Weeks	5476	782.3	15.00
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3 - TERMINATION TRACKING



INPUT THE EMPLOYEE ID. THE REMAINDER OF THE EMPLOYEE INFORMATION WILL AUTO POPULATE

ADD IN THE TERMINATION DATE, AND REASON.
 • **TERMINATION DATE** IS IMPORTANT, AS IT PLAYS A ROLE IN YOUR 'DATE RANGE FILTER'.

IF TERMINATED, USE THE DROP DOWN MENU TO SELECT YES

EMPLOYEE TERMINATION TRACKING

All Time

Terminated
1

For Date Range

From	Terminated
1/1/23	1
To	
3/1/24	

#	Employee ID #	Name	Location (State)	Job Title	Terminated	Terminated Date (mm/dd/yyyy)	Reason Terminated
1	1000200	Bob Winston	CA	Electrical Engineer	Yes	9/23/2023	
2	1000201	Kevin Michaels	SC	Contractor	No		
3	1000202	Michael Seth	NH	Steel Worker	No		
4	1000203	Sara Lucy	GA	Business Development Lead	No		
5					No		
6					No		
7					No		
8					No		
9					No		
10					No		
11					No		
12					No		
13					No		
14					No		



4 - EMPLOYEE LEAVE/STATUS TRACKING



INPUT THE EMPLOYEE ID. THE REMAINDER OF THE EMPLOYEE INFORMATION WILL AUTO POPULATE

USE THE DROP DOWN MENU TO SELECT THE CURRENT STATUS CODE.

CUSTOMIZE UP TO 6 LEAVE/STATUS CODES. THIS LIST BECOMES THE QUICK SELECTION MENU IN YOUR TABLE

THE REST OF THE TABLE IS OPTIONAL STATUS DETAILS YOU CAN USE AT YOUR DISCRETION

EMPLOYEE LEAVE TRACKING AND STATUS

Leave Codes
FMLA
LOA
STD
LTD

List Your Status Codes

#	EmployeeID #	Name	Location (State)	Job Title	Leave Status	Start Date (mm/dd/yyyy)	End Date (mm/dd/yyyy)	Frequency	Duration	Date of Absence (mm/dd/yyyy)	Time Missed	Status	Reason
1	1000200	Bob Winston	CA	Electrical Engineer		6/1/2023	6/1/2023			6/1/2023			
2	1000201	Kevin Michaels	SC	Contractor									
3	1000202	Michael Seth	NH	Steel Worker									
4	1000203	Sara Lucy	GA	Business Development Lead									
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5 - PTO DAY TRACKING



INPUT THE EMPLOYEE ID.
THE REMAINDER OF THE
EMPLOYEE INFORMATION
WILL AUTO POPULATE

FOR EACH PTO DAY
PROVIDED, LIST THE DATE AND
REASON, FOR UP TO 5 PTO
DAYS.

PTO TRACKING

#	EmployeeID #	Name	Location (State)	Job Title	Day 1	Reason	Day 2	Reason	Day 3	Reason	Day 4	Reason
1	1000200	Bob Winston	CA	Electrical Engineer	6/1/23		6/1/23		6/1/23		6/1/23	
2	1000201	Kevin Michaels	SC	Contractor								
3	1000202	Michael Seth	NH	Steel Worker								
4	1000203	Sara Lucy	GA	Business Development Lead								
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6 - VACATION TRACKING



INPUT THE EMPLOYEE ID.
THE REMAINDER OF THE
EMPLOYEE INFORMATION
WILL AUTO POPULATE

DOCUMENT THE WEEK OUT
FOR ANY VACATION WEEKS
TAKEN, UP TO 6 WEEKS.

VACATION TRACKING

#	EmployeeID #	Name	Location (State)	Job Title	Earned Vacation	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
1	1000200	Bob Winston	CA	Electrical Engineer	2 Weeks	6/1/23					
2	1000201	Kevin Michaels	SC	Contractor	2 Weeks						
3	1000202	Michael Seth	NH	Steel Worker	2 Weeks						
4	1000203	Sara Lucy	GA	Business Development Lead	6 Weeks						
5											
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7											
8											
9											
10											
11											
12											
13											
14											
15											



7 - CALL OUT TRACKING



INPUT THE EMPLOYEE ID.
THE REMAINDER OF THE
EMPLOYEE INFORMATION
WILL AUTO POPULATE

DOCUMENT THE DATE
FOR EACH CALL OUT
OCCURRENCE

CALL OUT TRACKING

#	EmployeeID#	Name	Location (State)	Job Title	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9
1	1000200	Bob Winston	CA	Electrical Engineer	6/1/23	6/1/23	6/1/23	6/1/23	6/1/23	6/1/23	6/1/23	6/1/23	6/1/23
2	1000201	Kevin Michaels	SC	Contractor									
3	1000202	Michael Seth	NH	Steel Worker									
4	1000203	Sara Lucy	GA	Business Development Lead									
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14													
15													



8 - WORKER'S COMPENSATION



INPUT THE EMPLOYEE ID.
THE REMAINDER OF THE
EMPLOYEE INFORMATION
WILL AUTO POPULATE

THE REST OF THE TABLE IS
OPTIONAL STATUS DETAILS
YOU CAN USE AT YOUR
DISCRETION

WORKER'S COMP TRACKING

#	EmployeeID #	Name	Location (State)	Job Title	Reason	Date Of Accident	Report Only	Details	Name of Examiner	Court Date	Return To Work Date	Light Duty
1	1000200	Bob Winston	CA	Electrical Engineer		6/1/23	Yes			6/1/23		Yes
2	1000201	Kevin Michaels	SC	Contractor			No					No
3	1000202	Michael Seth	NH	Steel Worker			No					No
4	1000203	Sara Lucy	GA	Business Development Lead			No					No
5							No					No
6							No					No
7							No					No
8							No					No
9							No					No
10							No					No
11							No					No
12							No					No
13							No					No
14							No					No
15							No					No



IMPORTANT

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