# HUMAN RESOURCE DASHBOARD GUIDE

4.0 - 5/11/24







SpreadWiseCo<sub>TM</sub>

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



# 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

									Tenare			
#	EmployeeID#	Name	Location (State)	Date Of Hire	Job Title	Status	Vacation Earned	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												
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11												
12												
13												
14												



Tenure

#### 2 - EMPLOYEE LIST



ADD YOUR CURRENT EMPLOYEE LIST **DFTAILS:** 

- 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

Average Tenure Yrs 5.50

For Date Range

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

									renure			
#	EmployeeID#		Name	Location (State)	Date Of Hire	Job Title	Status	Vacation Earned	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	
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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

AUTime
Terminated
1

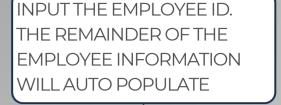
From Terminated
1/1/23
To

3/1/24

#	Employed 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		
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7					No		
8					No		
9					No		
10					No		
11					No		
12					No		
13					No		
14					No		

# 4 - EMPLOYEE LEAVE/STATUS TRACKING





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

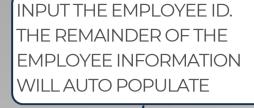
FMLA
LOA
STD
LTD

LTD

ш	#	EmployeeID#	Name	Location (State)	Job Title	Leave Status	Start Date	End Date	Frequency	Duration	Date of Absenge	Time	Status	Reason	
L	"	Employeelb #	Nume	Location (State)	300 IIIIC	Leave Status	(mm/dd/yyyy)	(mm/dd/yyyy)	rrequency	Duracion	(mm/dd/yyyy)	Missed	Status	Tre do o 1	
	1	1000200	Bob Winston	CA	Electrical Engineer		6/1/2023	6/1/2023			6/1/202				
	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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	11														
	12														

#### 5 - PTO DAY TRACKING





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	Week3	Week4	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						
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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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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

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

# **IMPORTANT**

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