EXECUTIVE PEOPLE DASHBOARD

OVERVIEW

The Executive People Dashboard is designed for executives and senior leadership. It provides real-time access to firmwide key people metrics - hires & terminations, future hires, future terminations (for your Supervisory Organization), and open Sold & Funded requisitions.

Please note that Workday and the Data Warehouse reports will never match exactly since Workday is real-time and Data Warehouse reporting is based on mid-month and end-month snapshot.

We recommend using your Workday dashboards for real-time, operational viewing of data. If you are going into a Board meeting or a meeting with investors, it’s best to use the Data Warehouse mid-month and end-month data since this is the official data source for external reporting.

The Executive People Dashboard, available to Partners and Vice Presidents includes:

- **Firmwide Hires and Terminations Fiscal Year to Date (FYTD)** – These dashboard reports include any FTE whose hire date or termination date falls within the month. This report view allows you to see any data that is already ‘on the books’ for the month. Even if it’s only the 1st day of the month, the report view reflects anyone who already has a recorded hire or termination date in that month.

- **Firmwide Future Hires (90-day outlook)** – this chart is a forward looking view into the activity already recorded for the next three months. From here you can keep an eye on the number of hires that are already in the pipeline.

- **Supervisory Organization Future Terminations (90-day outlook)** - Due to the sensitivity of the future terminations data, this chart will only display terminations for your Supervisory Organization. From here you can keep an eye on the number of terminations that are already in the pipeline.

- **Firmwide Sold and Funded (S&F) Requisitions** - In this firmwide view by account, you can see the number of open S&F requisitions across the firm. To view all requisition types, exit the Executive People Dashboard and use the Supervisory Organization Recruiting dashboard.

The Executive People Dashboard is accessed from the Dashboard Worklet found on the Workday Home Page by selecting “Executive People Dashboard”.

![Dashboard Worklet](image)
FIRMWIDE HIRES FYTD & FIRMWIDE TERMINATIONS FYTD

These two reports function identically, one displays the number of firmwide hires, while the other displays the number of firmwide terminations.

FIRMWIDE HIRES FYTD

Firmwide Hires FYTD is designed to show a view of all FTE Hires for FYTD by Month. A total is also displayed on the bottom left of the report. Throughout the fiscal year, as each month closes, you will see more columns showing up displaying data for the entire year.

As always, you will see data appear here in real-time as it happens in Workday.

The gear icon can be used to select various organization types (Group, Account Group, FSO, etc.) This changes the data displayed in the chart.
If you click on any column, it will allow you to pull up the details of the events that took place that month, by clicking “View Details”. The same applies for the total at the bottom for the FYTD.

In the details, you can click any column to filter that element to look at a subset of this data. For example, you can look up employees that were hired into a specific account.
If you click “View More” at the bottom, this report will open up on a new page.

Here you will be prompted for which Organization and Subordinates you want to view, and for what time period. For Firmwide current fiscal year view, keep the default values and click ‘OK’ at the bottom.

In this view, you have the ability to select one or multiple organizations (e.g., Account Group, FSO, IMT). When you do, the values in the chart will change.
FIRMWIDE TERMINATIONS FYTD

This report is designed to show a firmwide view of all terminations by FTE for FYTD.

The same features of the Firmwide Hires FYTD report also apply to the Firmwide Terminations FYTD report. The one addition is the Firmwide Terminations FYTD report reflects Voluntary and Involuntary Terminations. Throughout the course of the fiscal year, you will see more columns display data, as we enter the following month. And, you will see real-time data appear in the report as it is recorded in Workday.
FIRMWIDE FUTURE HIRES (90-DAY OUTLOOK) AND SUPERVISORY ORGANIZATION FUTURE TERMINATIONS (90-DAY OUTLOOK)

These two reports function identically, one displays the number of future hires, while the other displays the number of future terminations.

Please note: These two reports have different features than the Firmwide Hires and Firmwide Terminations reports.

FIRMWIDE FUTURE HIRES (90-DAY OUTLOOK)

Firmwide Future Hires (90 Day Outlook) is designed to show future hires. It displays anyone whose hire date is between the current date you are reviewing and 90 days from the current date. All months before the current month will always display blank, as this report is forward looking.

The gear icon can be used to change the Supervisor Organization. By default, it is set for a firmwide view.
If you click on any column, it will allow you to drill down into the details of the month, by clicking “View Details”. The same applies for the total FYTD.

In the details, you can click any column to filter that specific element to look at a subset of this data. For example, if you want to look up futures hires in a specific FSO during this month.
Now that the data is filtered to show only Consulting FSO, we can further break this down by selecting “View by:” and selecting one of the available field options, the clicking “Refresh”.

Then, the table will re-format and show the future hires broken down by Account Group within the Consulting FSO.

Clicking the chart icon in the corner will create a visual representation of the future hires broken down by Account Group within the Consulting FSO (see next page for the pie chart visual).
A pie chart is the default visual. To select a different data visual, click on the “graph” icon in the right hand corner and select your preferred visual (e.g., clustered column, stacked column, etc.).

If you click “View More” at the bottom, this report will open up on a new page.

On this page, you are prompted for the Organization and Subordinates you want to view. If you want a Firmwide view, keep the default values and click ‘OK’ at the bottom.
FIRMWIDE FUTURE TERMINATIONS (90-DAY OUTLOOK)

Firmwide Future Terminations (90-Day Outlook) is designed to show future terminations and reflects anyone who will be terminating between the current date you are reviewing and 90 days from the current date. All months before the current month will always display blank, as this report is forward looking.

The same features of the Firmwide Future Hires (90-day Outlook) report apply to the Firmwide Future Terminations (90-day Outlook) report.

Due to the sensitivity of data, this report only displays future terminations data for your Supervisory Organization and any Subordinates.

FIRMWIDE SOLD & FUNDED (S&F) REQUISITIONS BY ACCOUNT GROUP

This report is designed to show the total Firmwide S&F requisitions and also shows the S&F requisitions alphabetized by account group.

If you would like to see any specific Account Group, you can click it from the list provided, and the chart will update accordingly.