



KPI's for Fourth Shift

Tableau Hands-On

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What is a KPI?

What is Tableau?

Overview of What
is Included...

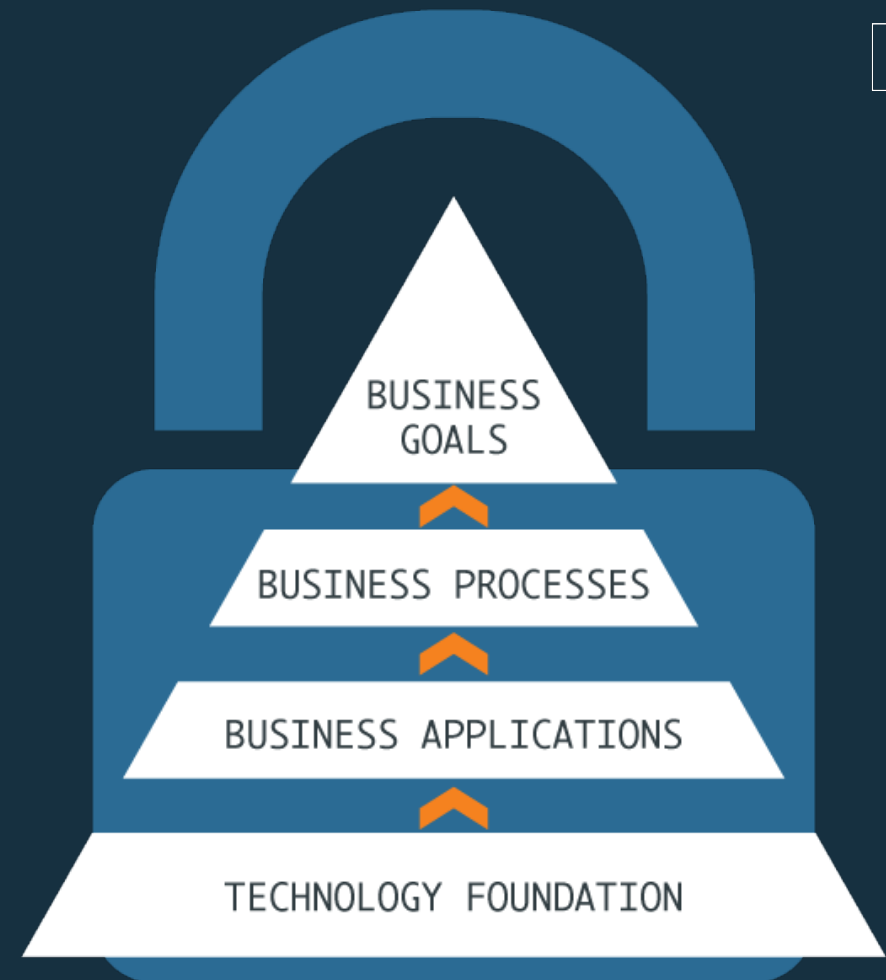
How to Modify a
✖ Template...

The ICG Approach



Technology plays a crucial role in the success and operations of businesses across all industries and sectors.

A solid **technology foundation** delivers your **business applications** when and where you need them. These two combined implements your unique **business processes** allowing you to reach your **goals**.





O U R M I S S I O N :



Deliver innovative and reliable business and technology solutions that exceed our client's expectations, resulting in reduced cost, improved efficiency, and a guaranteed ROI.



O U R V I S I O N :



Enable enterprises of all sizes to leverage technology for
business growth and success.



What is a KPI?

KPI is the acronym for “Key Performance Indicator” and is defined as a measurable value that demonstrates how effectively a company is achieving key business objectives and goals.

Rather than expressing these objectives and goals in words and detailed graphics that can take personnel awhile to develop, data can be extracted from the ERP system and using a visual analytics platform, one can develop a standard set of KPIs for the business that are updated real-time for all users to review and determine if objectives and goals are being met.

Introducing... Tableau



Now we are cooking with grease!

What is Tableau?



Visual Analytics Platform

Transforms the way data is used to solve problems!
Empowering organizations to make the most of their data!
No additional software for end users – all web based!



Update Basic Reports into Visuals/KPIs for Quick Results

Why require pages of data – just report a visual presentation of the data for quick results!



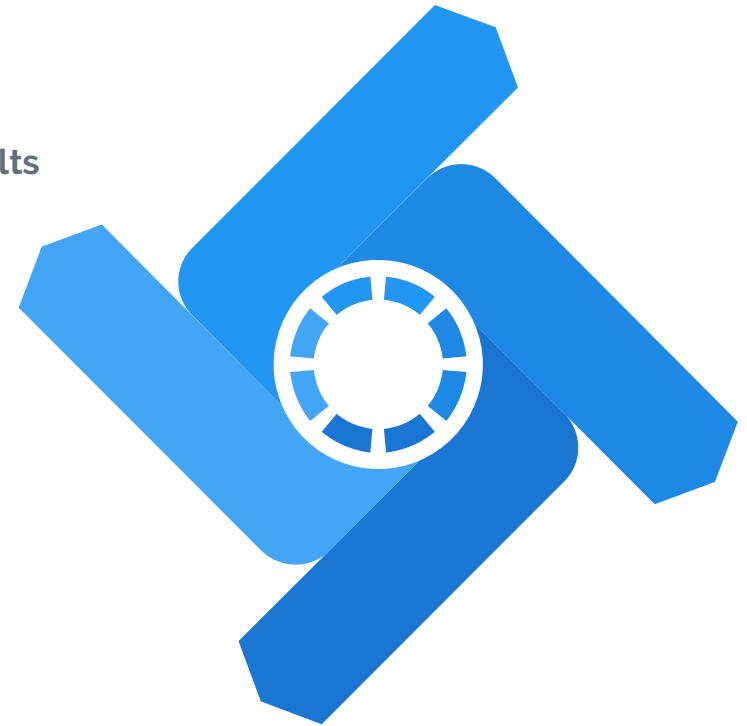
Drive Change with Data

Utilizing the ERP database backend of SQL Server, all of the data is available! Drive change quickly by reporting current trends to meet business objectives and goals!



Community

There is more than one million members to support one another through forms, user groups and events!



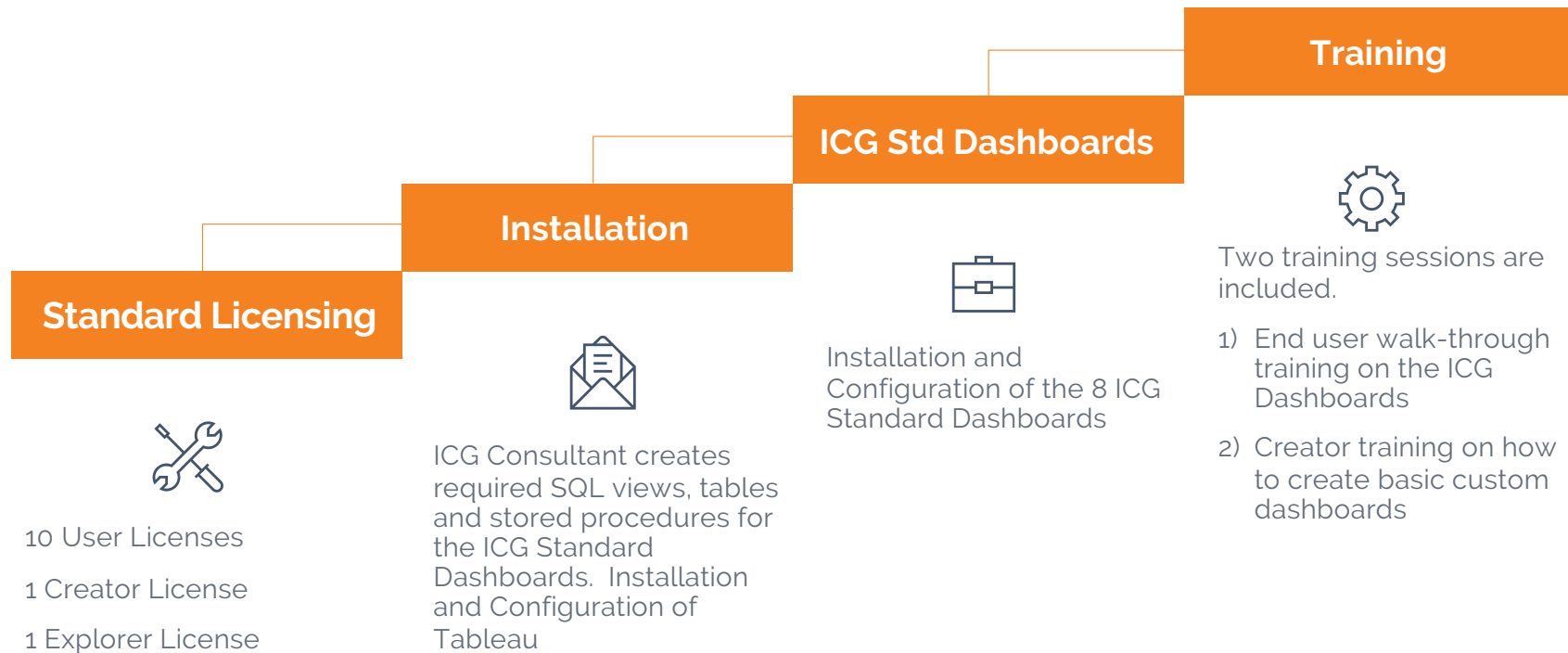


What's Included With Tableau?



Don't give me... I'm poor as a field mouse!

Tableau Includes...



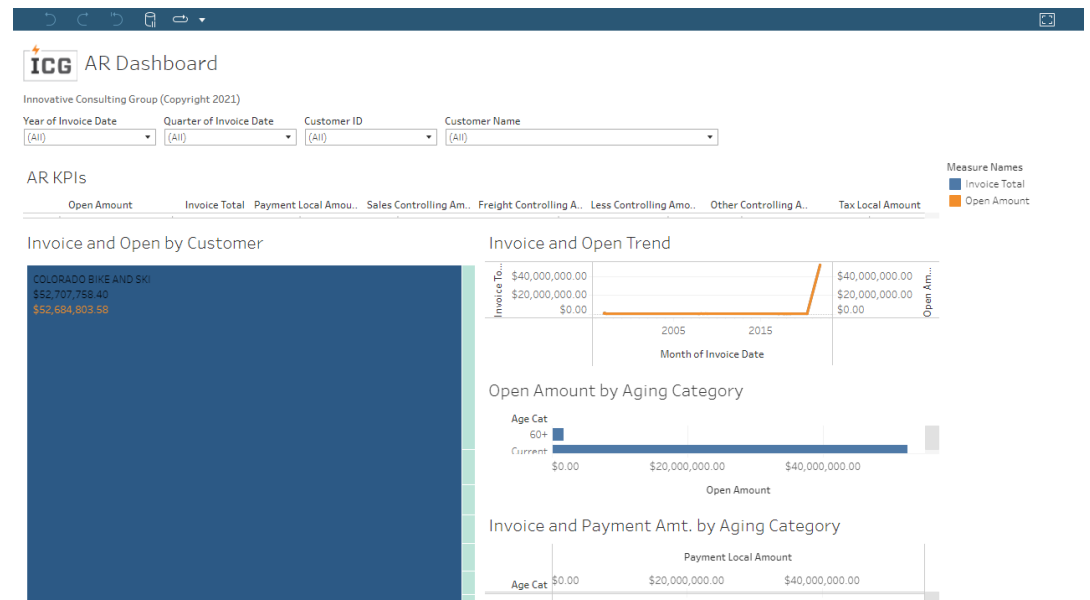
ICG Standard Dashboards



Financials Dashboard

Quick Visual of AR KPIs:

- Invoice & Open by Customer
- Invoice & Open Trend
- Open Amount by Aging Category
- Invoice & Payment Amount by Aging Category



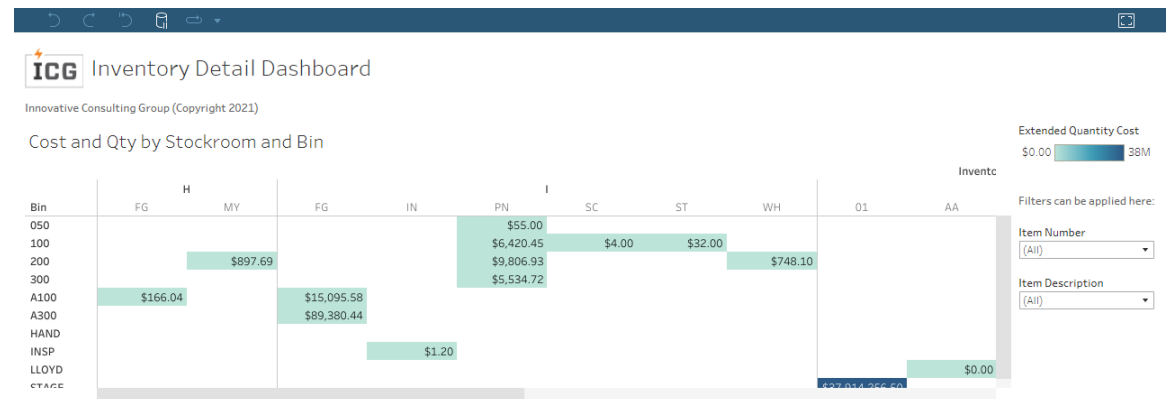
ICG Standard Dashboards



Item Inventory Dashboard

Quick Visual of Item Inventory KPIs:

- Cost & Quantity by Stockroom & Bin
- Item Detail
- Item Lot Detail



Item Detail

Item Number	Item Descri..	Item UM	Item Type	Item Status	Is Lot Traced	ItemClass1	ItemRefere..	Allocation ..	ATP Quanti..	External W..	In Inspecti..	In Shipping..	Intern
Null	Null	Null	Null	Null	Null	Null	Null	47,481	-1,265,152	77	0	0	
19-BLACK	19" FRAME..	EA	N	A	N	C	B	6,730	-209,578	0	470	20	
19-BLUE	19" FRAME..	EA	N	A	N	C		141,345	-1,037,878	0	2	26	
19 FRAME	19" FRAME..	EA	N	A	N	C		21	0	0	0	0	

Item Lot Detail

Item Number	Item Descri..	Item UM	Item Type	Is Lot Traced	Item Status	ItemClass1	ItemRefere..	Stockroom	Bin	Inventory C..	Lot Number	Year of Lot..	###
19-BLACK	19" FRAME..	EA	N	N	A	C	B	01	STAGE	0		1980	###

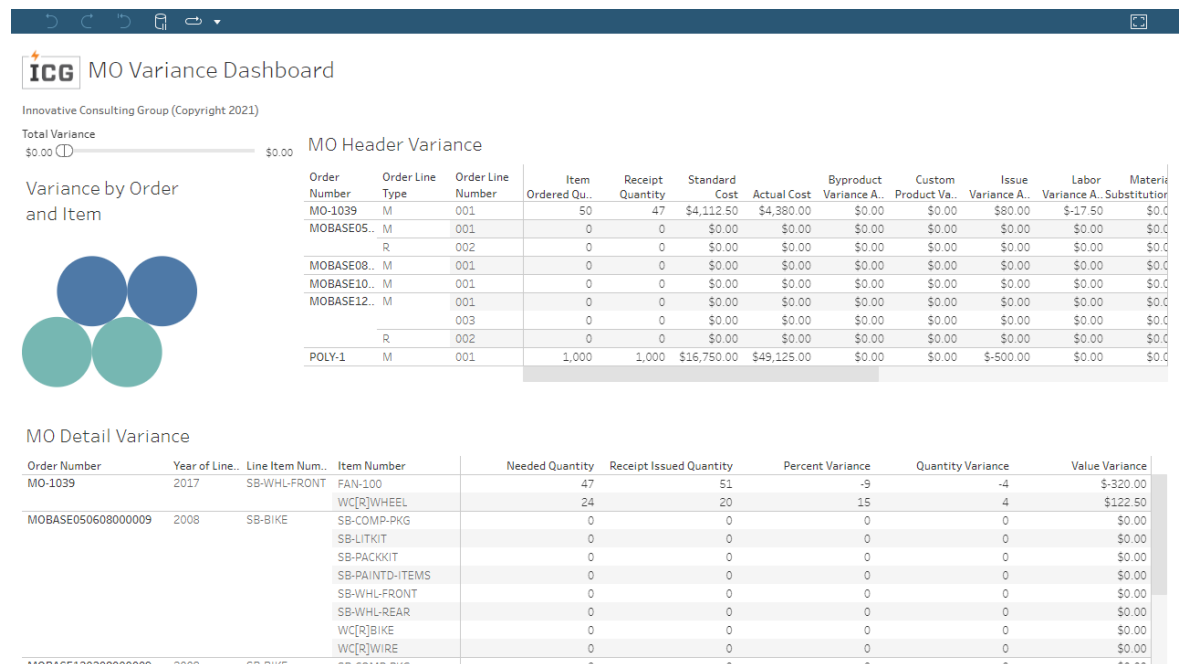
ICG Standard Dashboards



MO Variance Dashboard

Quick Visual of MO Variance KPIs:

- Variance by Order & Item
- MO Header Variance
- MO Detail Variance



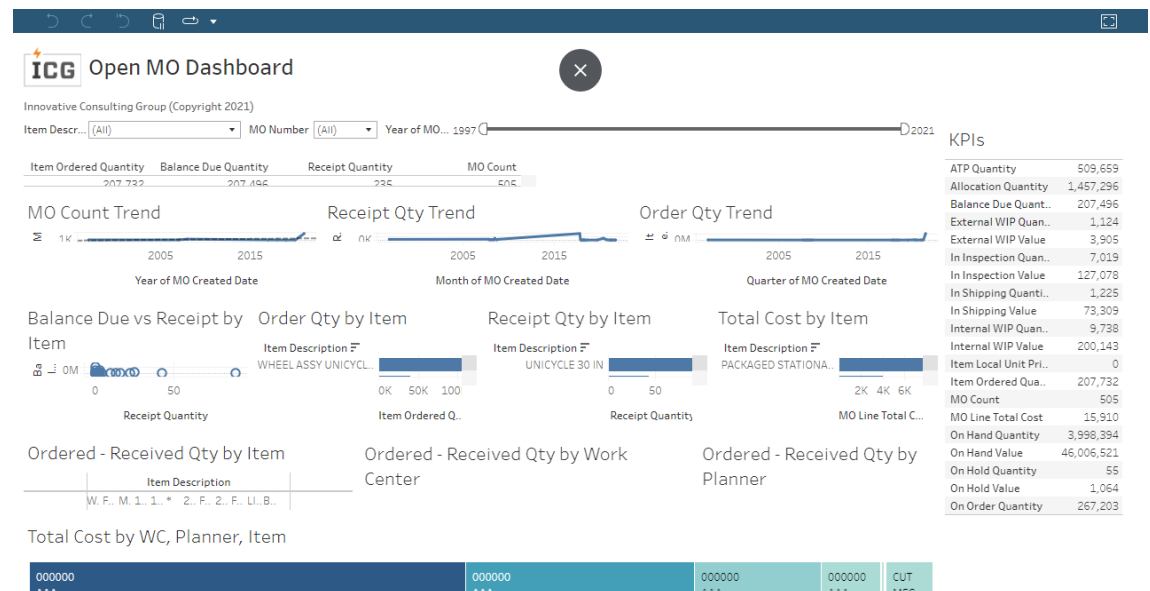
ICG Standard Dashboards



Open MO Dashboard

Quick Visual of Open MO KPIs:

- Trends: MO Count, Receipt Quantity & Order Quantity
- Balance Due vs Receipt by Item: Order Quantity, Receipt Quantity & Total Cost
- Ordered/Received Qty by: Item, Work Center & Planner
- Total Cost by Work Center, Planner & Item



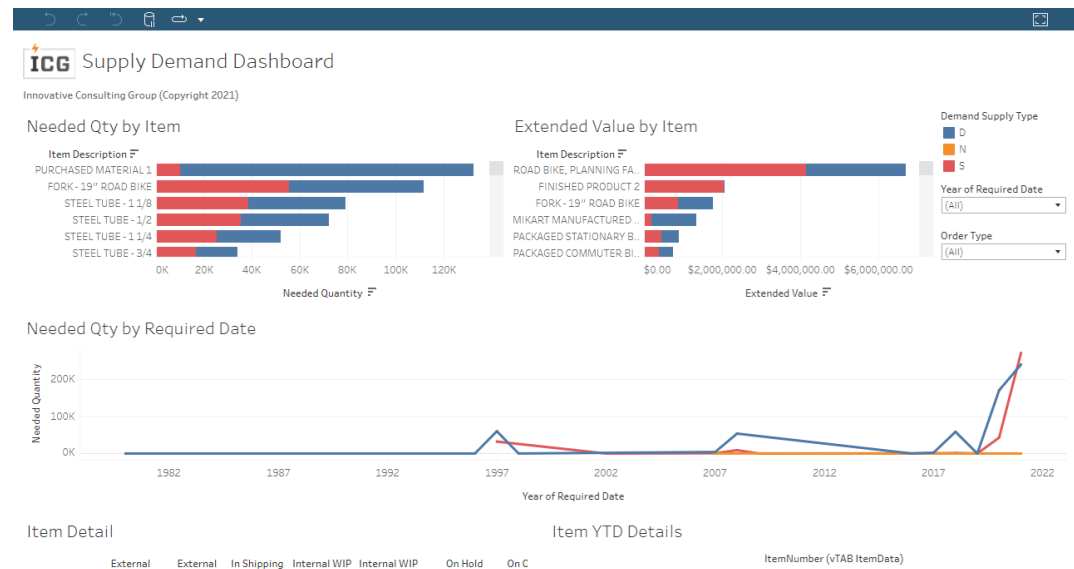
ICG Standard Dashboards



Supply Demand Dashboard

Quick Visual of Supply Demand KPIs:

- Needed Quantity by Item
- Extended Value by Item
- Needed Quantity by Required Date
- Item Detail
- Item YTD Details



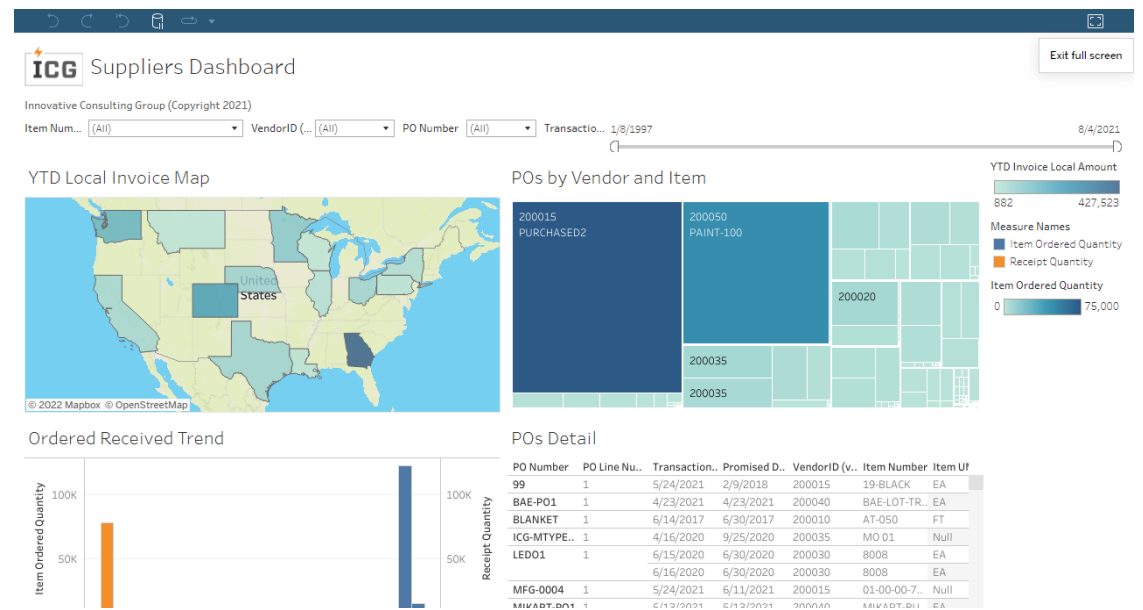
ICG Standard Dashboards



Suppliers Dashboard

Quick Visual of Suppliers KPIs:

- YTD Local Invoice Map
- POs by Vendor & Item
- Order Received Trend
- POs Detail



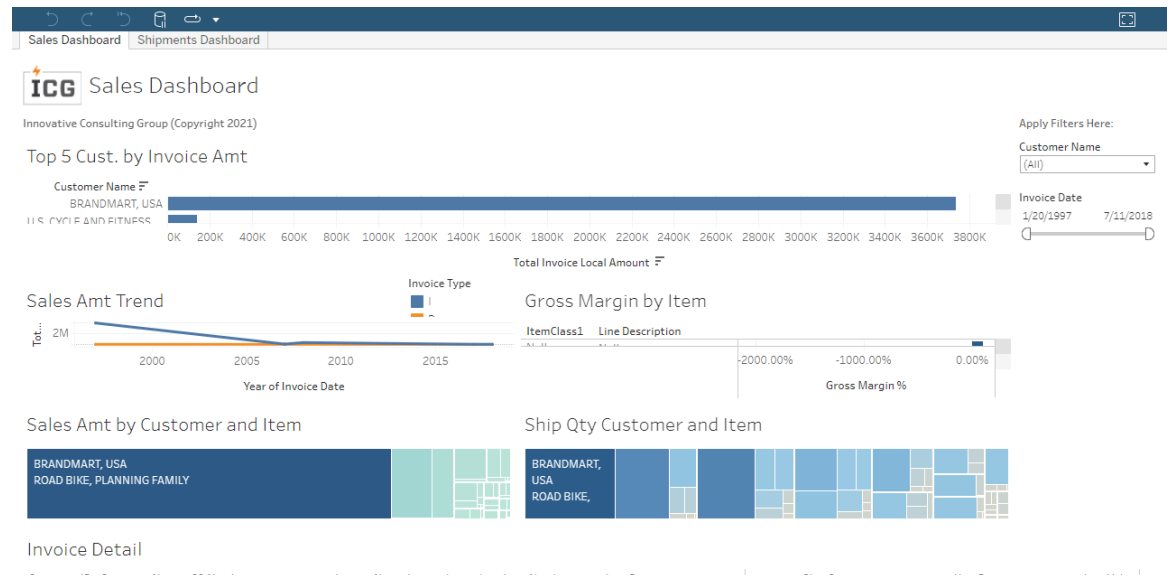
ICG Standard Dashboards



Sales Dashboard

Quick Visual of Sales KPIs:

- Top 5 Customers by Invoice Amount
- Sales Amount Trend
- Gross Margin by Item
- Sales Amount by Customer & Item
- Ship Quantity Customer & Item



ICG Standard Dashboards



Shipments Dashboard

Quick Visual of Shipments KPIs:

- Shipment Trends
- Shipments by Customer
- Shipments by Item



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How Do I Make Changes to... Tableau Dashboards

For Your Designated Tableau Creator, making changes isn't difficult!
Let's Walk Through Utilizing Tableau!



Quit your piddlin' and get to work!

Hands On



SQL Server

IP Address:
User: SA
Password:



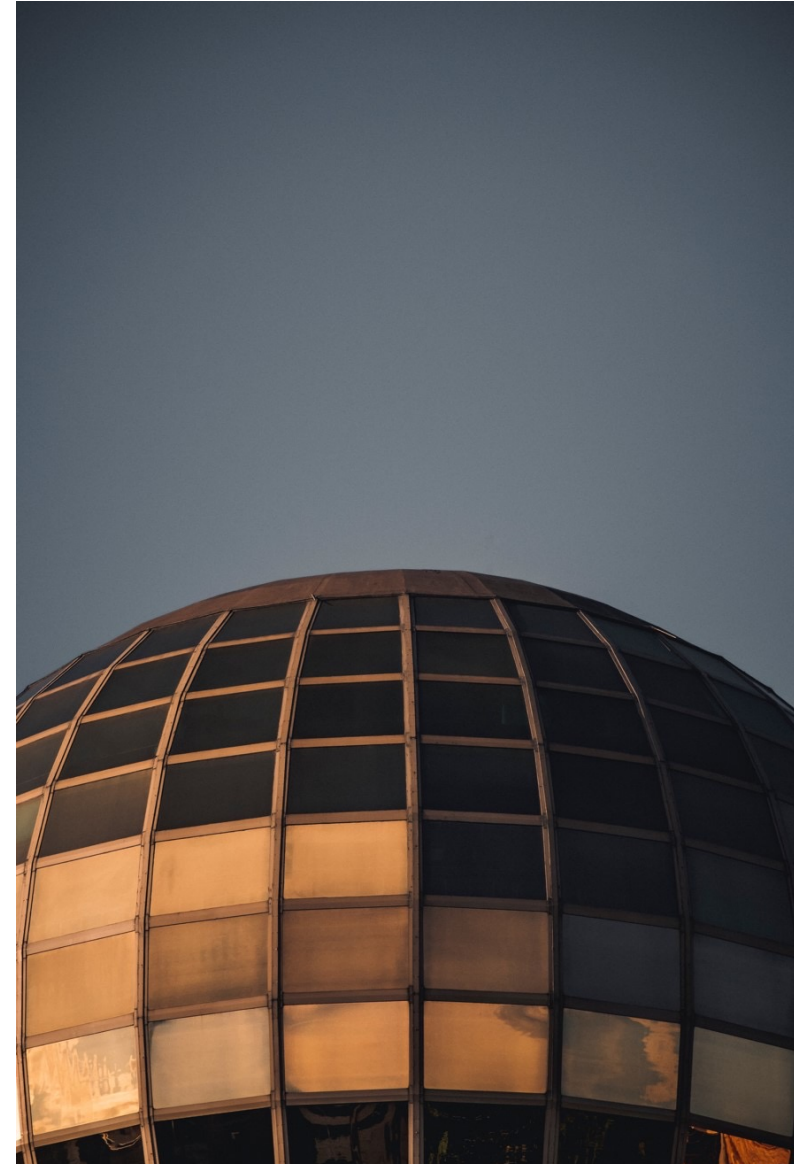
Can't Publish

Go to Internet, change to:
Validate website online.tableau.com connects



Summit Tableau Account

Website: Online.Tableau.com
User: tab1summittest@gmail.com
Password: Summit2022!





Any Questions?

Thank You!

We're living in high cotton!