

# Tableau

Presented by Cami Paulson

BUSINESS SYSTEMS ANALYST, INNOVATIVE CONSULTING GROUP

*Fourth Shift Summit*

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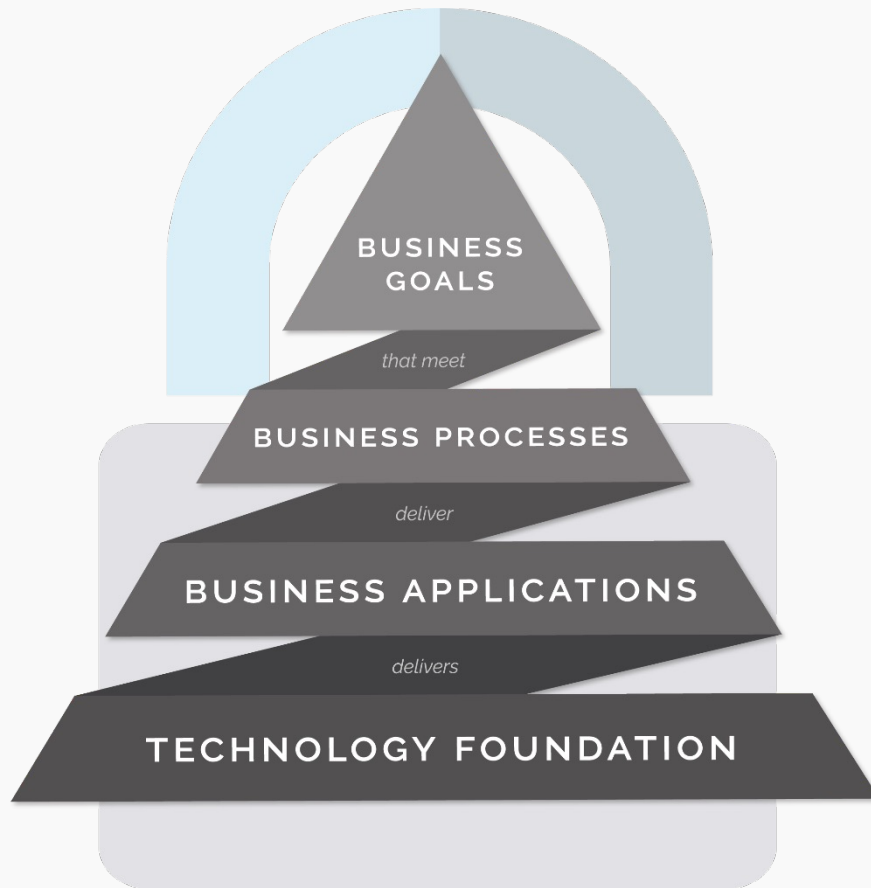




**01** What is Tableau?

**02** Overview of What Is Included

**03** How To Change a Template



# The ICG Approach

**Technology is the foundation of your business.**

A solid Technology Foundation delivers your ERP and supporting applications. ICG develops solutions that pair business acumen with IT expertise to reach your business goals.



# What is Tableau?



## 01 Visual Analytics Platform

No additional software for end users – all web based!

## 02 Update Your Basic Reports into Visuals for Quick Results

Why do you require pages of data – just report visual representation of that data for quick results!

## 03 Drive Change with Your Data

Utilizing your Fourth Shift database backend SQL Server, all of your data is at your fingertips! Drive change by quickly reporting current trends!



# What's Included With Tableau?

## Licensing

Standard licensing includes:

- 10 User Licenses
- 1 Creator License
- 1 Explorer License

## Installation

Creation of required SQL Views, Tables and Stored Procedures for the ICG Standard Dashboards

## ICG Standard Dashboards

8 Standard Dashboards

## Training

Two training sessions

- End User Walk-Through Training on ICG Standard Dashboards
- Creator Training on How to Create Basic Custom Dashboards

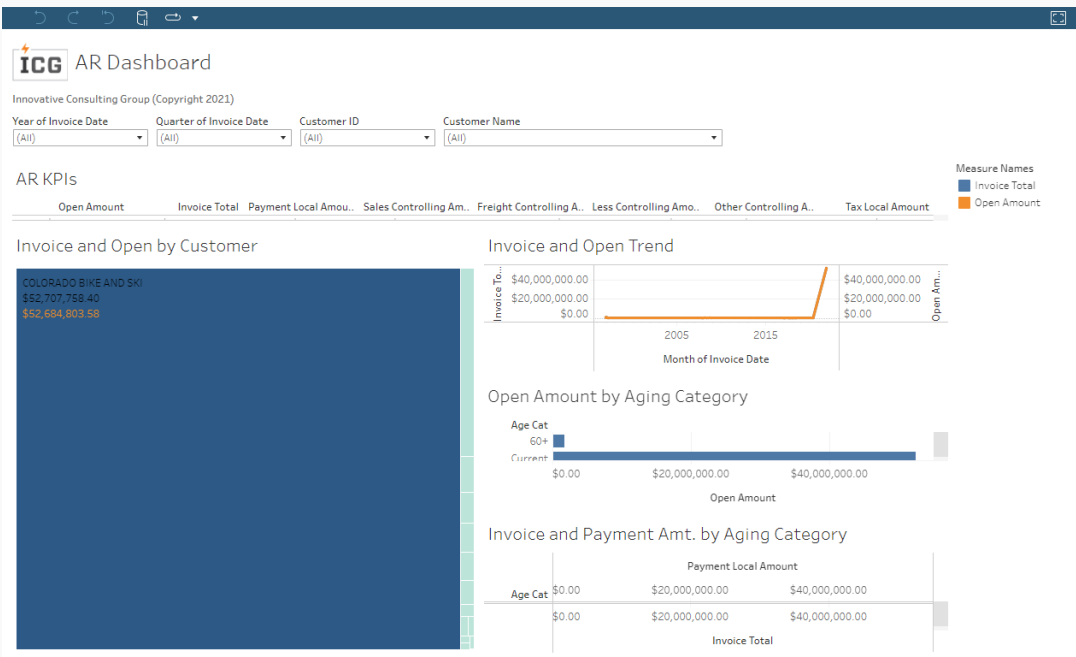
# ICG Tableau Dashboards



## 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





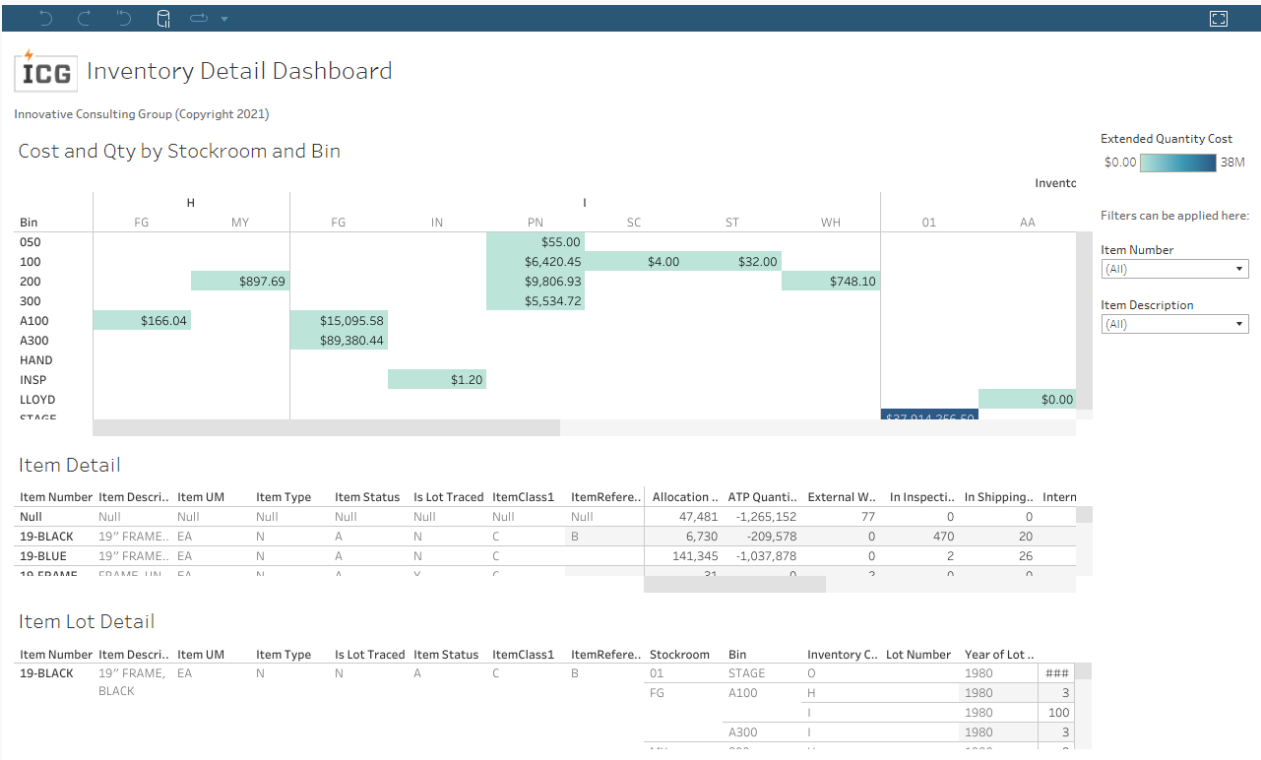
# ICG Tableau Dashboards



## Item Inventory Dashboard

Quick Visual of Item Inventory KPIs:

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



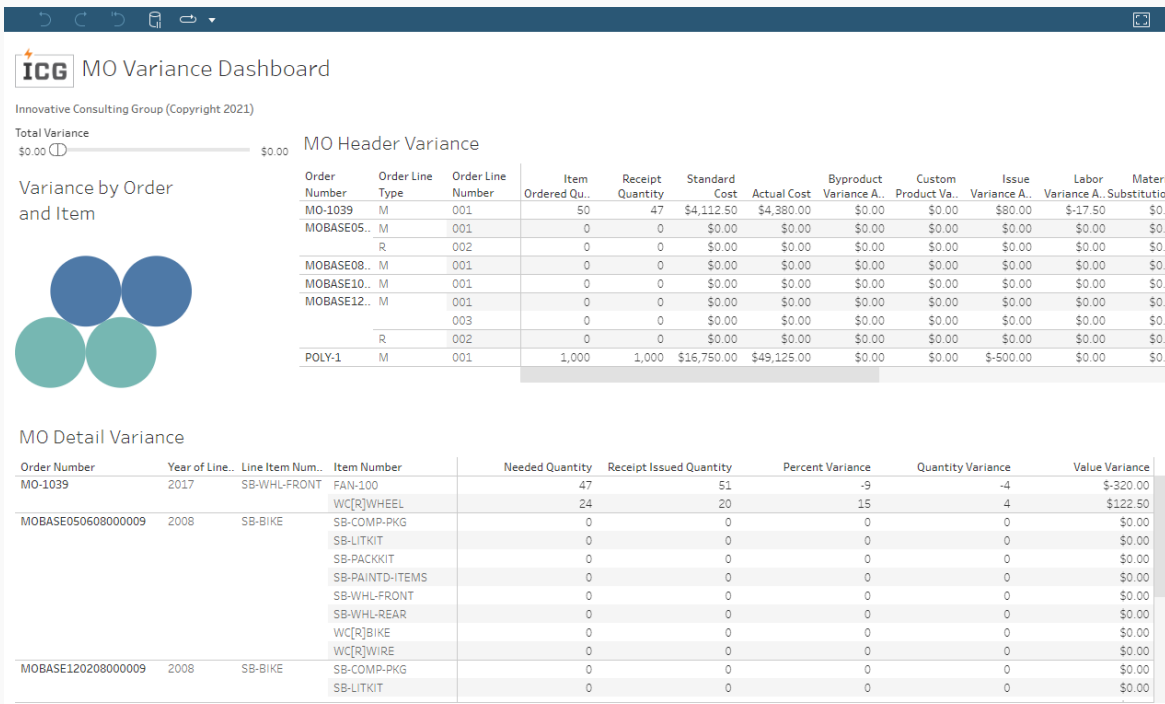
# ICG Tableau Dashboards



## MO Variance Dashboard

Quick Visual of MO Variance KPIs:

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





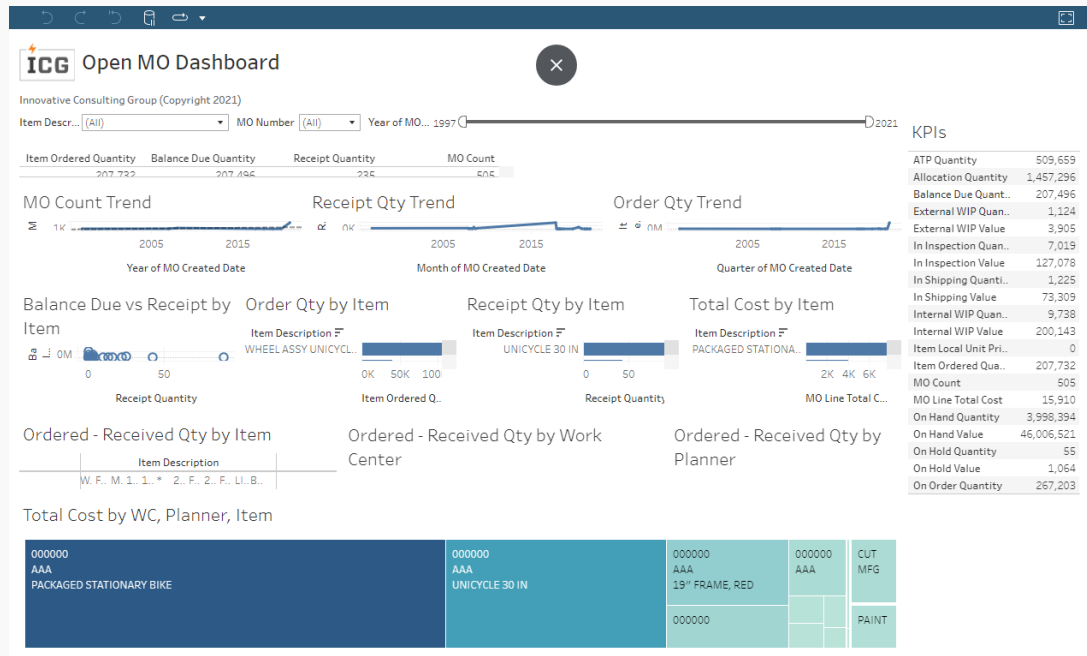
# ICG Tableau Dashboards



## 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



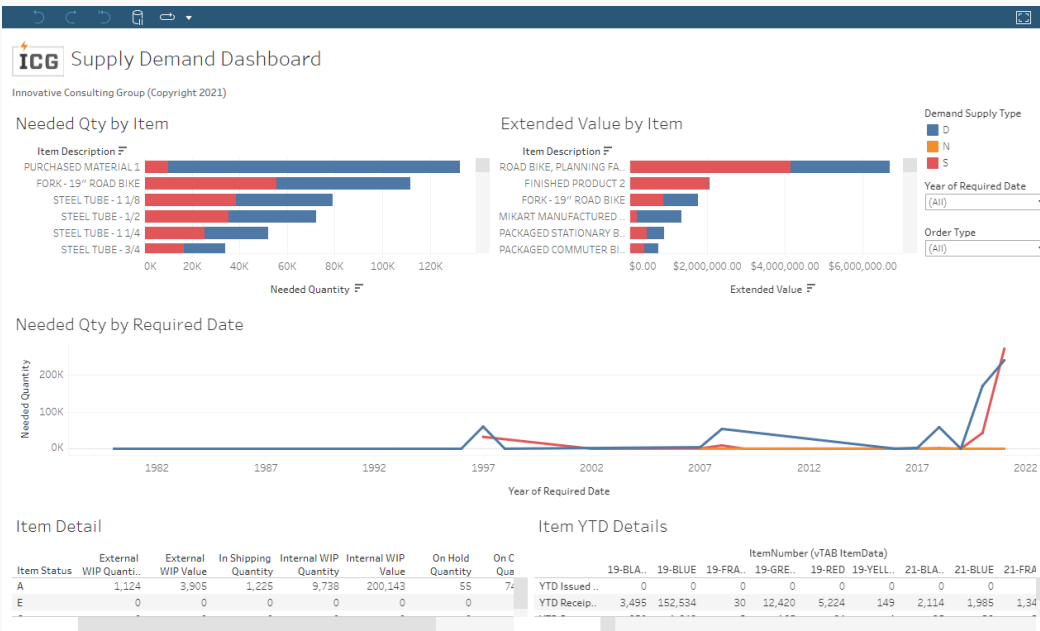
# ICG Tableau Dashboards



## 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



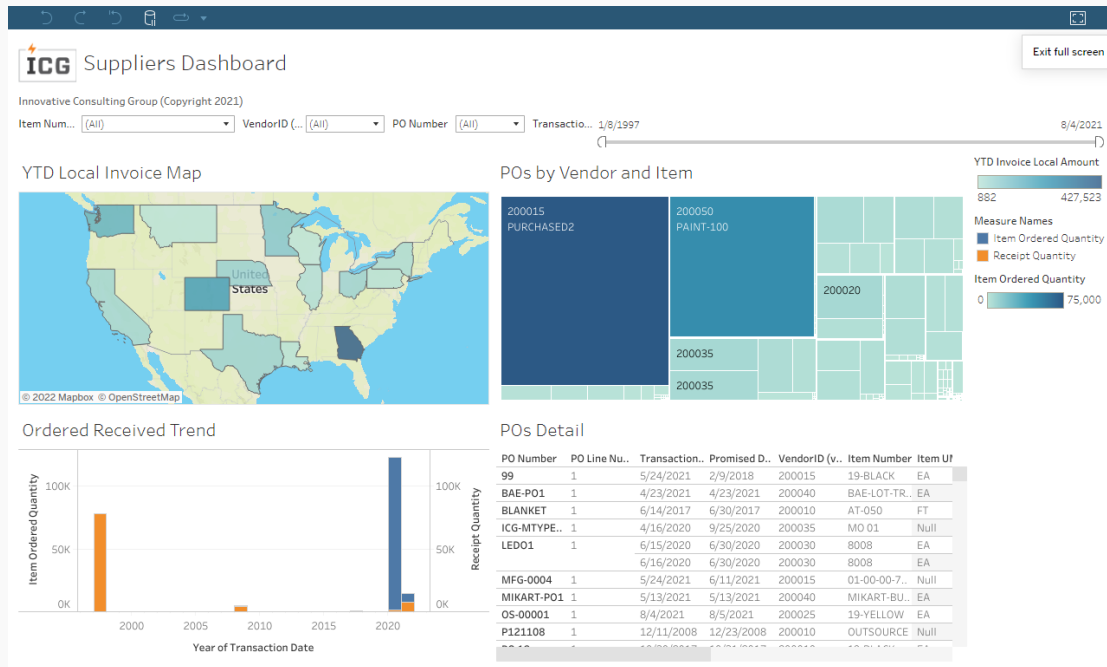
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## Suppliers Dashboard

Quick Visual of Suppliers KPIs:

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





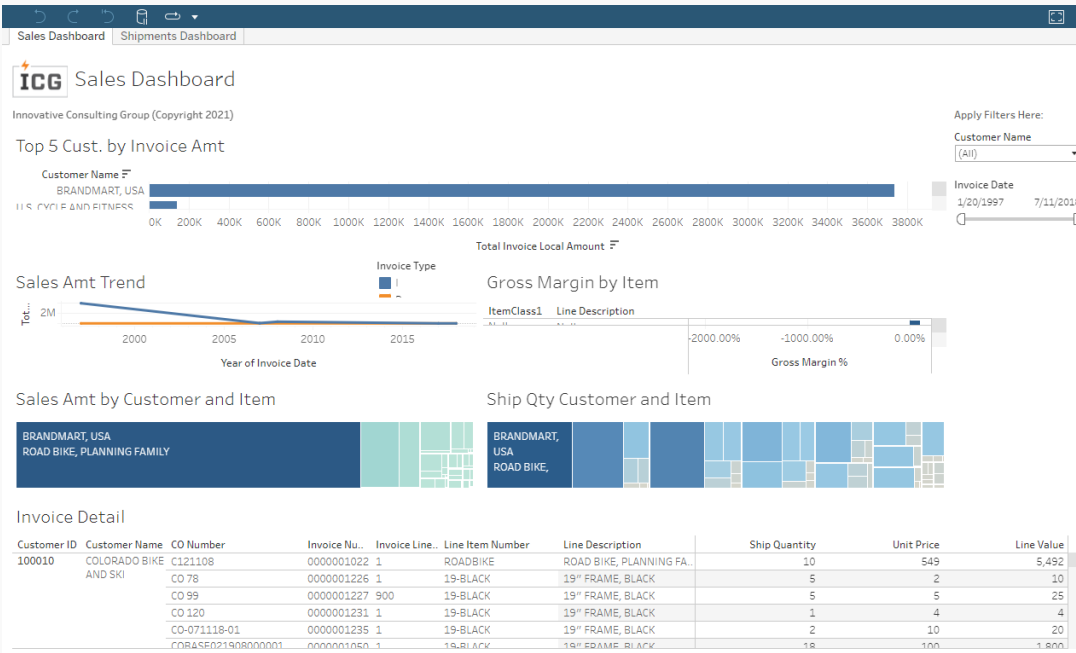
# ICG Tableau Dashboards



## 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



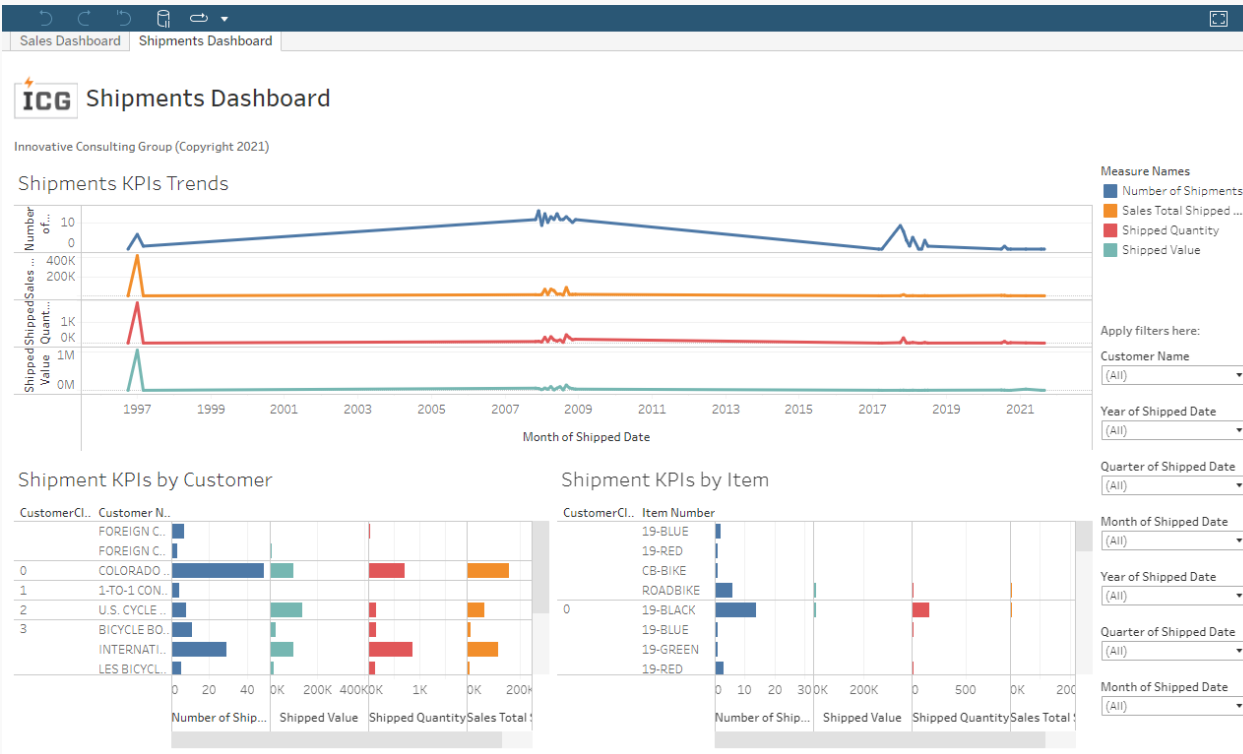
# ICG Tableau Dashboards



## Shipments Dashboard

Quick Visual of Shipments KPIs:

- Shipment Trends
- Shipments by Customer
- Shipments by Item





# How Do I Make Changes?

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



# Hands On



## Domain Account

User: SummitUser01

Password: SummitUser2022!@



## Summit Account

Online.tableau.com

User: tab1summittest@gmail.com

Password: Summit2022!





# Questions?

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