

Tableau Newsletter

Welcome to Global Sales Analytics Tableau Newsletter 4.0

* Following the start of Q2, all of the workbooks have been adjusted and modified to show and follow the newly incorporated Quarter End Snapshot logic. Regular Snapshot Date Saturday steps remain throughout the year with the exception of dates pointing to the end of the Quarter, with the cut-out snapshot date set as the first day of the next quarter. Example of Snapshot Date steps: 9-Jun-2018, 16-Jun-2018, 23-Jun-2018, **1-Jul-2018**, 7-Jul-2018, ...

** Workbooks and Dashboards that show historical data are following the Snapshots available, hence the users need to be aware of the facts above in choosing the historical point or period span in which a calculation is being performed.

All of the workbooks have been adjusted and corrected to follow the newly integrated PMDM Hierarchy and will continue adapting as the rest of the hierarchy levels are introduced and connected through SFDC and database.

****New in Tableau****

Note: July Outlook has been received and added.

Retail IEMEA 1.2 : H2 / H3 (Industry / Region) specific pre-filtered workbook, containing Summarized funnel analysis, relevant Dashboards from Funnel Playbook/Leaders Dashboard, Variance and WFR Historic (Summary, Same Time in Qtr with Conversion, Variance Highlights, Variance Details, Aged <180, Average Aging by Hierarchy) .

Financial MEA 1.0 : H2 / H3 (Industry / Region) specific pre-filtered workbook, containing Current funnel analysis, relevant Dashboards from Funnel Playbook, Variance and WFR Historic (Current Daily, Variance WoW by Country, Closed Summary & Rates, Avg Open & Closed Days, Funnel Value Aging by Country, Funnel Sufficiency & Conversion Rates).

Financial Europe 1.0 : H2 / H3 (Industry / Region) specific pre-filtered workbook, constructed in the same manner as Financial MEA, but for set determined Region.

Product MDM - An additional deployment will be scheduled to include any necessary updates to the dashboards as a result of Product MDM...more to come...



Tips & Tricks

*Saving views — Set the Dashboard / Workbook to specific needs (periods, filters, changeable options), click on the [bar graph] **View** button, name your desired view and save it. In this way, the view is available to you any time as a preset to all of the filters and adjustments on that workbook, you just need to select it.

*Alert— Choose the value axis on a chart and press the [bell] **Alarm** button. This opens a pop-up “Create Alert” menu, where you can adjust the conditions for the alert based on the values of the chart selected and the alert will arrive as a snapshot image of the threshold action to placed Recipients e-mail addresses.

*Need to review the opportunity in SFDC itself - when you click on Opp Number within the view, pop up window will enable—Link to SFDC option

- Tableau is based on your SFDC access.
- For SFDC users—Tableau tab is available within SFDC listed in menu selection
- Non-SFDC users are assigned access based on their needs. Non-SFDC users should use this link to our workbooks published on Tableau Server: [HTTPS://SVCANALYTICS.CORP.NCR.COM/#/SITE/SALES/PROJECTS/100/WORKBOOKS](https://svcanalytics.corp.ncr.com/#/SITE/SALES/PROJECTS/100/WORKBOOKS)

Known Issues:

Please let us know if you experience any other error messages!

Ongoing streamlining of existing views with minimal scrolls, filter optimization also in progress.

*****Please note: NCR network is required for reviewing Tableau workbooks. *****

Need some TRAINING?

Should you need a refresher or some additional training for your team, please contact us to arrange.

Please share your feedback/ suggestions as we develop enhanced views to support our users!

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