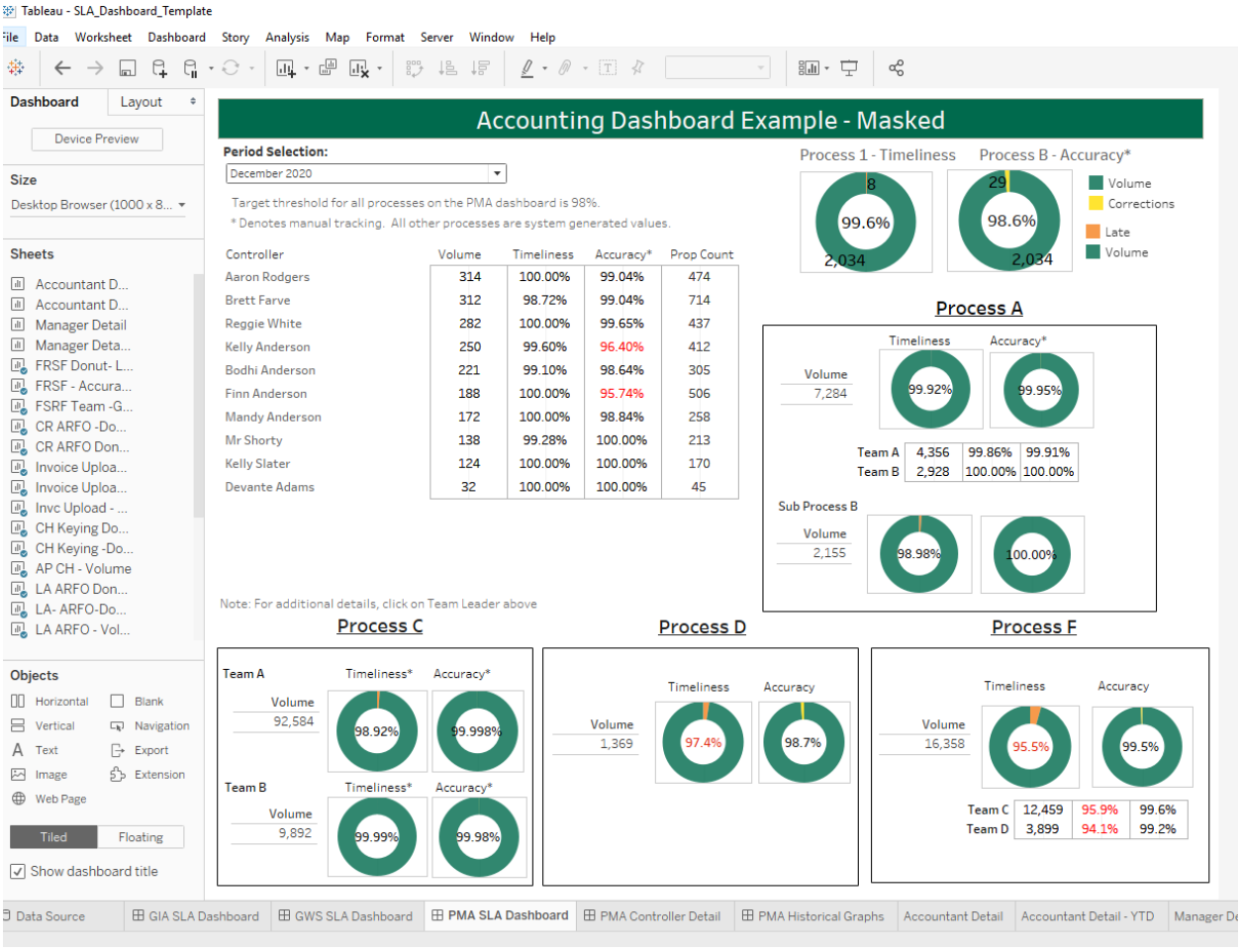
Tableau Example

Here are some examples and screenshots (with mocked up and masked data) from projects I have worked on.

The first example is an example of how Tableau can be used for KPI or SLA reporting. The data can come from a variety of sources for a report like this, but the end result is a clean one page dashboard that shows indicators of the performance of the different teams and processes.



Accounting Dashboard Example - Masked

Period Selection:

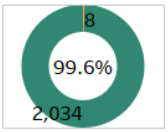
December 2020

Target threshold for all processes on the PMA dashboard is 98%.

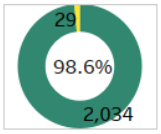
* Denotes manual tracking. All other processes are system generated values.

Controller	Volume	Timeliness	Accuracy*	Prop Count
Aaron Rodgers	314	100.00%	99.04%	474
Brett Farve	312	98.72%	99.04%	714
Reggie White	282	100.00%	99.65%	437
Kelly Anderson	250	99.60%	96.40%	412
Bodhi Anderson	221	99.10%	98.64%	305
Finn Anderson	188	100.00%	95.74%	506
Mandy Anderson	172	100.00%	98.84%	258
Mr Shorty	138	99.28%	100.00%	213
Kelly Slater	124	100.00%	100.00%	170
Devante Adams	32	100.00%	100.00%	45

Process 1 - Timeliness



Process B - Accuracy*

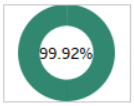


Volume
Corrections
Late
Volume

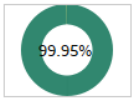
Process A

Volume
7,284

Timeliness



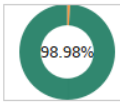
Accuracy*

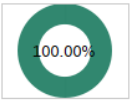


Team A	4,356	99.86%	99.91%
Team B	2,928	100.00%	100.00%

Sub Process B

Volume
2,155





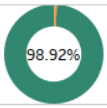
Note: For additional details, click on Team Leader above

Process C

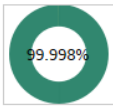
Team A

Volume
92,584

Timeliness*



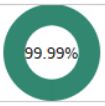
Accuracy*



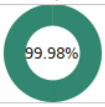
Team B

Volume
9,892

Timeliness*



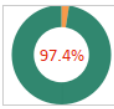
Accuracy*



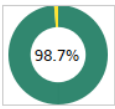
Process D

Volume
1,369

Timeliness



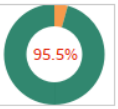
Accuracy



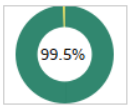
Process F

Volume
16,358

Timeliness



Accuracy



Team C	12,459	95.9%	99.6%
Team D	3,899	94.1%	99.2%

Accounting Dashboard - SLA Reporting December 2020

Period Selection:

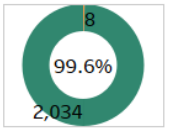
December 2020

Target threshold for all processes on the PMA dashboard is 98%.

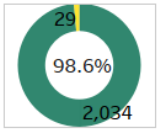
* Denotes manual tracking. All other processes are system generated values.

Controller	Volume	Timeliness	Accuracy*	Prop Count
Jane Doe	314	100.00%	99.04%	474
Joe Smith	312	98.72%	99.04%	714
Brett Farve	282	100.00%	99.65%	437
Aaron Rodgers	250	99.60%	96.40%	412
Kelly Anderson	221	99.10%	98.64%	305
Finn Anderson	188	100.00%	95.74%	506
Bodhi Anderson	172	100.00%	98.84%	258
Mandy Anderson	138	99.28%	100.00%	213
Kelly Slater	124	100.00%	100.00%	170
Matt LaFluer	32	100.00%	100.00%	45

FSRF - Timeliness



FSRF - Accuracy*



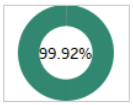
Volume
Corrections
Late
Volume

Payment Processing

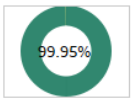
AP Batch

Volume 7,284

Timeliness



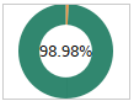
Accuracy*

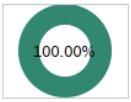


AP Batch - InHouse	4,356	99.86%	99.91%
AP Batch - Paymode	2,928	100.00%	100.00%

Funds Transfer

Volume 2,155



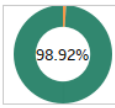


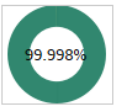
Note: For additional details, click on Team Leader above

Invoice Processing

P2P - Invoice Upload Timeliness* Accuracy*

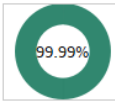
Volume 92,584

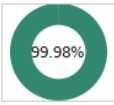




Client Hosted Keying Timeliness* Accuracy*

Volume 9,892



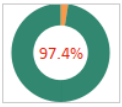


Lease Abstracts

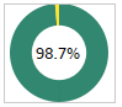
ARFO

Volume 1,369

Timeliness



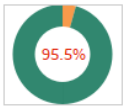
Accuracy



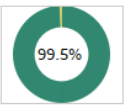
Cash Receipts

Timeliness

Volume 16,358



Accuracy



Cash Receipt - CG	12,459	95.9%	99.6%
Cash Receipt - InHouse	3,899	94.1%	99.2%

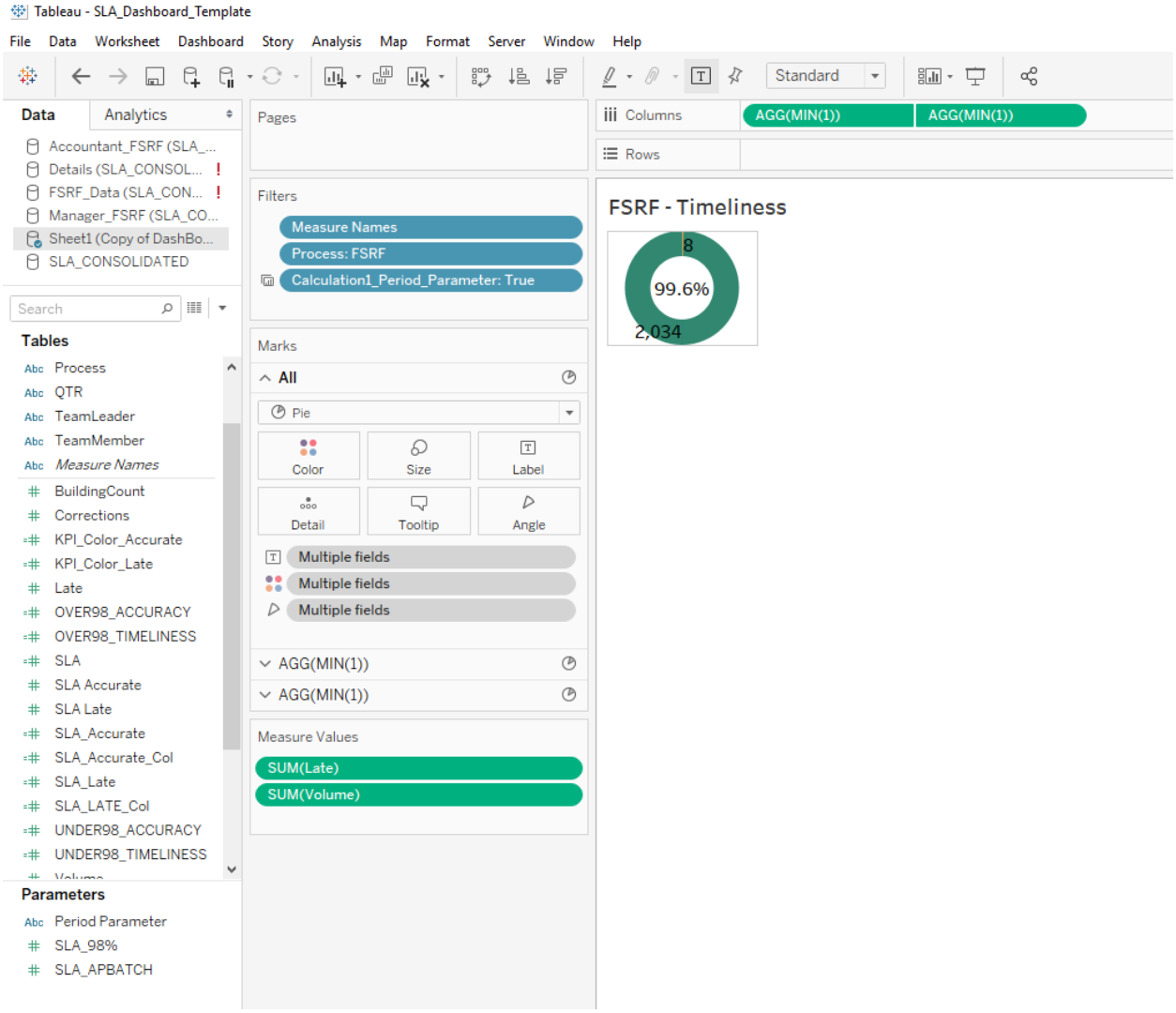
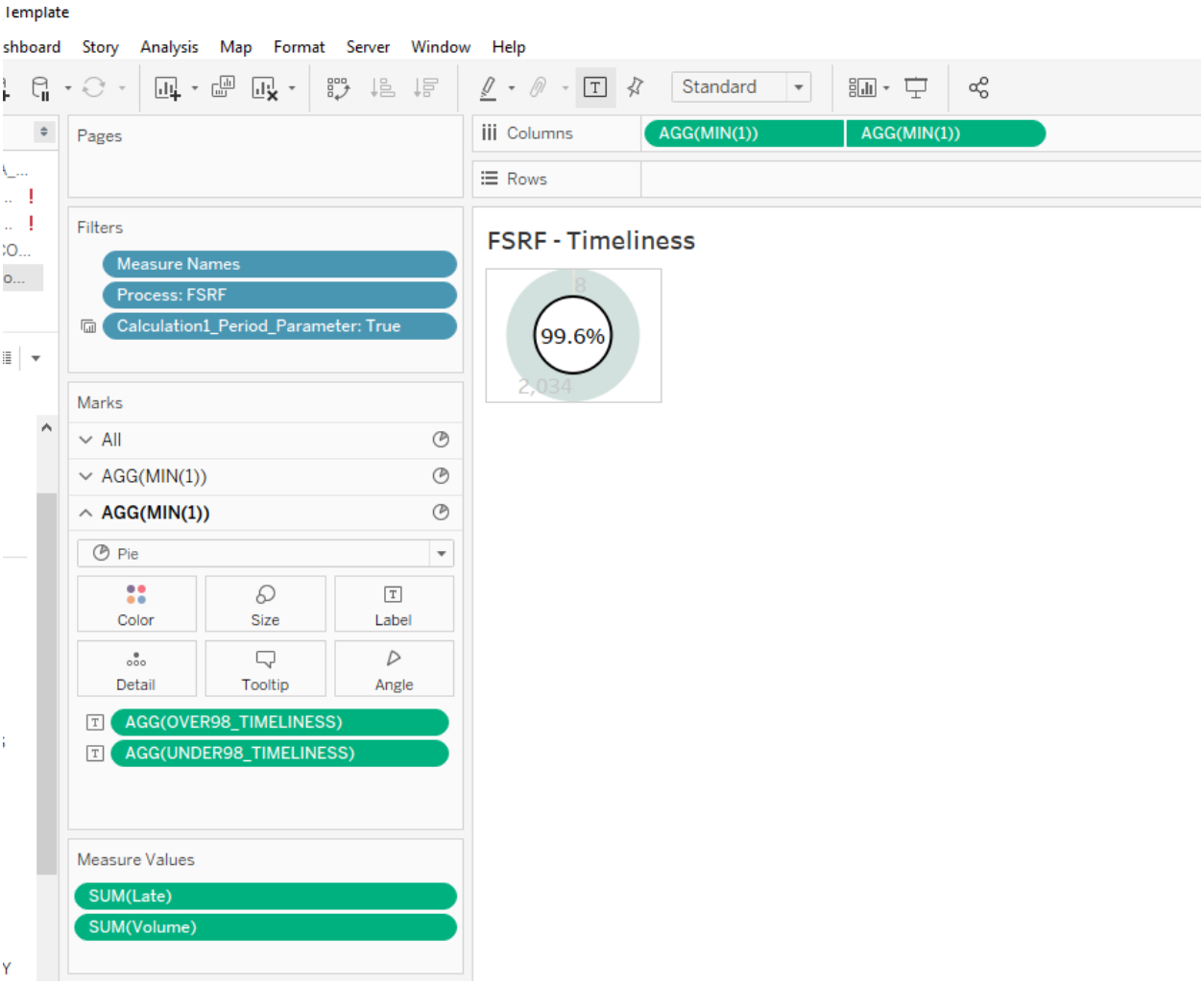


Tableau - SLA_Dashboard_Template
File Data Worksheet Dashboard Story Analysis Map Format Server Window Help
Standard
Data
Analytics
Accountant_FSRF (SLA_...
Details (SLA_CONSOL...
FSRF_Data (SLA_CON...
Manager_FSRF (SLA_CO...
Sheet1 (Copy of DashBo...
SLA_CONSOLIDATED
Search
Tables
Abc Process
Abc QTR
Abc TeamLeader
Abc TeamMember
Abc Measure Names
BuildingCount
Corrections
KPI_Color_Accurate
KPI_Color_Late
Late
OVER98_ACCURACY
OVER98_TIMELINESS
SLA
SLA Accurate
SLA Late
SLA_Accurate
SLA_Accurate_Col
SLA_Late
SLA_LATE_Col
UNDER98_ACCURACY
UNDER98_TIMELINESS
Parameters
Abc Period Parameter
SLA_98%
SLA_APBATCH
Pages
Filters
Measure Names
Process: FSRF
Calculation1_Period_Parameter: True
Marks
All
Pie
Color
Size
Label
Detail
Tooltip
Angle
Multiple fields
Multiple fields
Multiple fields
AGG(MIN(1))
AGG(MIN(1))
Measure Values
SUM(Late)
SUM(Volume)
Columns
AGG(MIN(1))
AGG(MIN(1))
Rows
FSRF - Timeliness
8
99.6%
2,034


Template
shboard Story Analysis Map Format Server Window Help
Standard
Pages
Columns
AGG(MIN(1))
AGG(MIN(1))
Rows
Filters
Measure Names
Process: FSRF
Calculation1_Period_Parameter: True
FSRF - Timeliness
99.6%
Marks
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AGG(MIN(1))
AGG(MIN(1))
Pie
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Label
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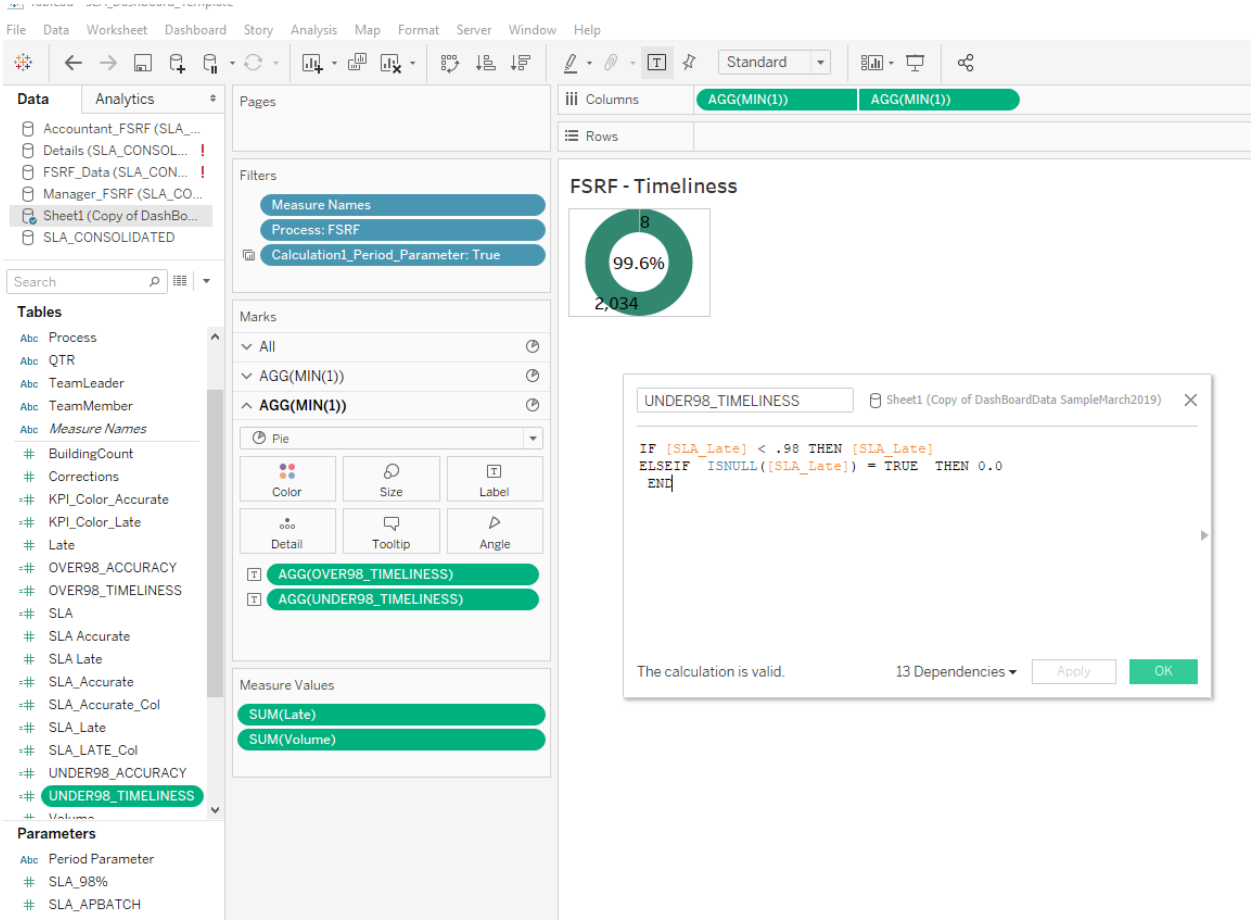
Tooltip
Angle
AGG(OVER98_TIMELINESS)
AGG(UNDER98_TIMELINESS)
Measure Values
SUM(Late)
SUM(Volume)


File Data Worksheet Dashboard Story Analysis Map Format Server Window Help
Standard
Data
Analytics
Accountant_FSRF (SLA_...
Details (SLA_CONSOL...
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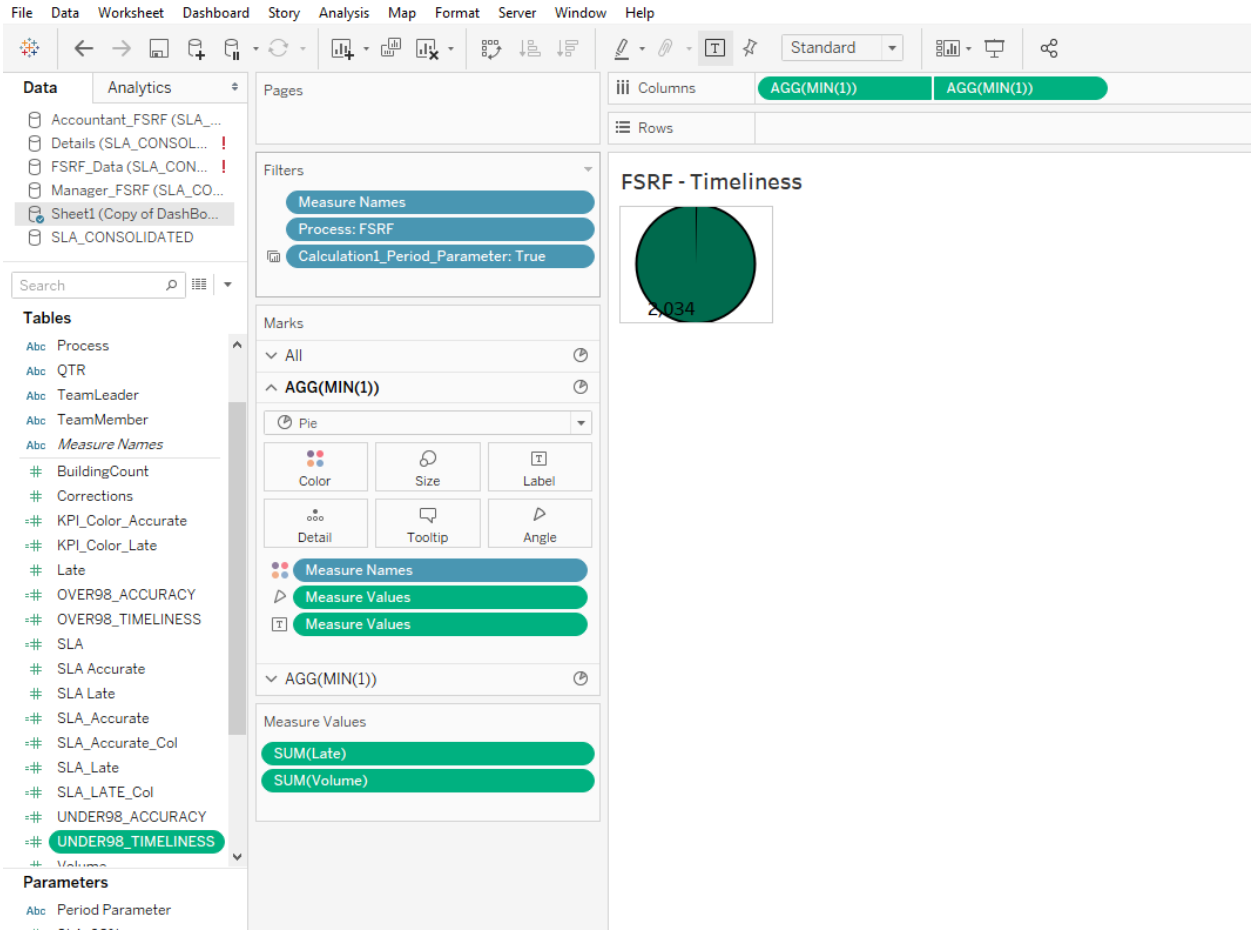
Manager_FSRF (SLA_CO...
Sheet1 (Copy of DashBo...
SLA_CONSOLIDATED
Search
Tables
Abc Process
Abc QTR
Abc TeamLeader
Abc TeamMember
Abc Measure Names
BuildingCount
Corrections
KPI_Color_Accurate
KPI_Color_Late
Late
OVER98_ACCURACY
OVER98_TIMELINESS
SLA
SLA Accurate
SLA Late
SLA_Accurate
SLA_Accurate_Col
SLA_Late
SLA_LATE_Col
UNDER98_ACCURACY
UNDER98_TIMELINESS
Parameters
Abc Period Parameter
SLA_98%
SLA_APBATCH
Pages
Filters
Measure Names
Process: FSRF
Calculation1_Period_Parameter: True
Marks
All
AGG(MIN(1))
AGG(MIN(1))
Pie
Color
Size
Label
Detail
Tooltip
Angle
AGG(OVER98_TIMELINESS)
AGG(UNDER98_TIMELINESS)
Measure Values
SUM(Late)
SUM(Volume)
Columns
AGG(MIN(1))
AGG(MIN(1))
Rows
FSRF - Timeliness
8
99.6%
2,034
UNDER98_TIMELINESS
Sheet1 (Copy of DashBoardData SampleMarch2019)
IF [SLA_Late] < .98 THEN [SLA_Late]
ELSEIF ISNULL([SLA_Late]) = TRUE THEN 0.0
END
The calculation is valid.
13 Dependencies
Apply
OK


File Data Worksheet Dashboard Story Analysis Map Format Server Window Help
Standard
Data
Analytics
Accountant_FSRF (SLA_...
Details (SLA_CONSOL...
FSRF_Data (SLA_CON...
Manager_FSRF (SLA_CO...
Sheet1 (Copy of DashBo...
SLA_CONSOLIDATED
Search
Tables
Abc Process
Abc QTR
Abc TeamLeader
Abc TeamMember
Abc Measure Names
BuildingCount
Corrections
KPI_Color_Accurate
KPI_Color_Late
Late
OVER98_ACCURACY
OVER98_TIMELINESS
SLA
SLA Accurate
SLA Late
SLA_Accurate
SLA_Accurate_Col
SLA_Late
SLA_LATE_Col
UNDER98_ACCURACY
UNDER98_TIMELINESS
Parameters
Abc Period Parameter
Pages
Filters
Measure Names
Process: FSRF
Calculation1_Period_Parameter: True
Marks
All
AGG(MIN(1))
Pie
Color
Size
Label
Detail
Tooltip
Angle
Measure Names
Measure Values
Measure Values
AGG(MIN(1))
Measure Values
SUM(Late)
SUM(Volume)
Columns
AGG(MIN(1))
AGG(MIN(1))
Rows
FSRF - Timeliness
2,034

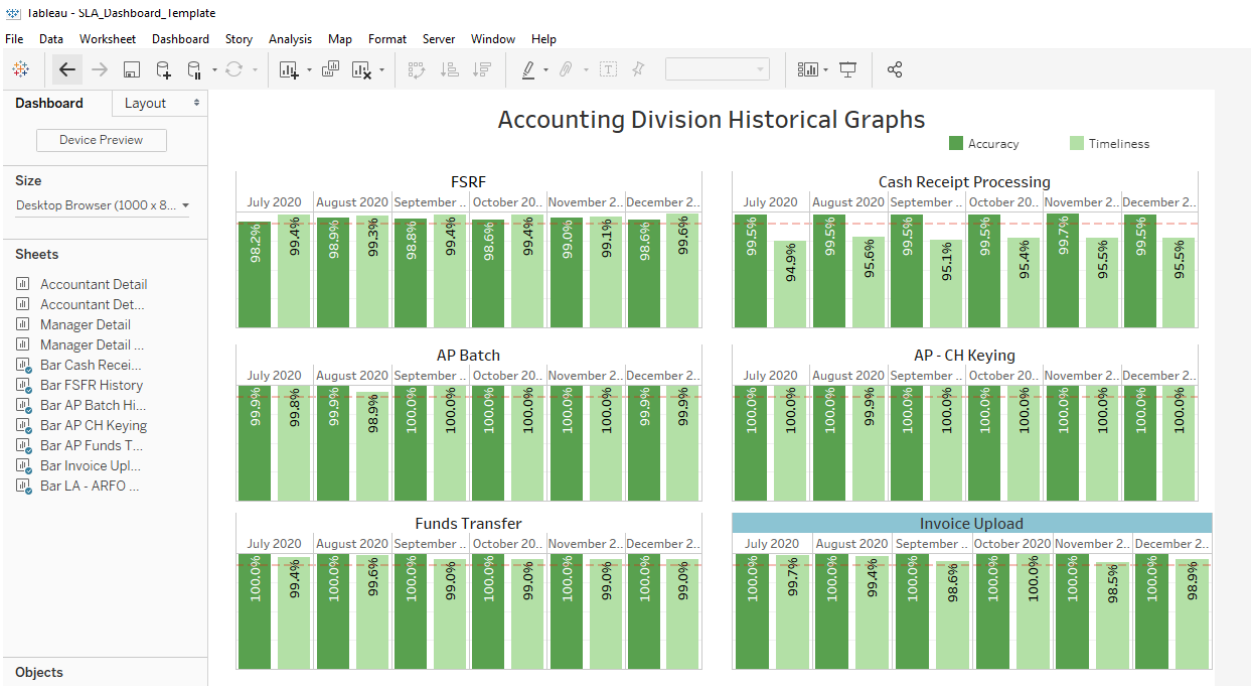


Tableau - SLA_Dashboard_Template
File Data Worksheet Dashboard Story Analysis Map Format Server Window Help
Dashboard
Layout
Device Preview
Size
Desktop Browser (1000 x 8...
Sheets
Accountant Detail
Accountant Det...
Manager Detail
Manager Detail ...
Bar Cash Recei...
Bar FSFR History
Bar AP Batch Hi...
Bar AP CH Keying
Bar AP Funds T...
Bar Invoice Upl...
Bar LA - ARFO ...
Objects
Accounting Division Historical Graphs
Accuracy
Timeliness
FSRF
Cash Receipt Processing
AP Batch
AP - CH Keying
Funds Transfer
Invoice Upload
July 2020
August 2020
September ..
October 20..
November 2..
December 2..

Another example of how we can use Tableau is a dashboard that compares two periods, to see trends against the data. The actual numbers have been removed in this screenshot, but the graphs give a quick picture into the period comparisons of the data. There are also a number of filters that make slicing and dicing the comparisons very easy and extremely useful in finding the trends and changes in the data.