

**KERI JAMES**

Tableau Portfolio

<https://public.tableau.com/profile/keri.james#!/>

# PORTFOLIO OVERVIEW

## DASHBOARD TABLE OF CONTENTS

[Financial Health](#)

[Vehicle Inventory](#)

[Land and Water Interests](#)

[Federal Employee Viewpoint Survey](#)

[Condo Association Budget](#)

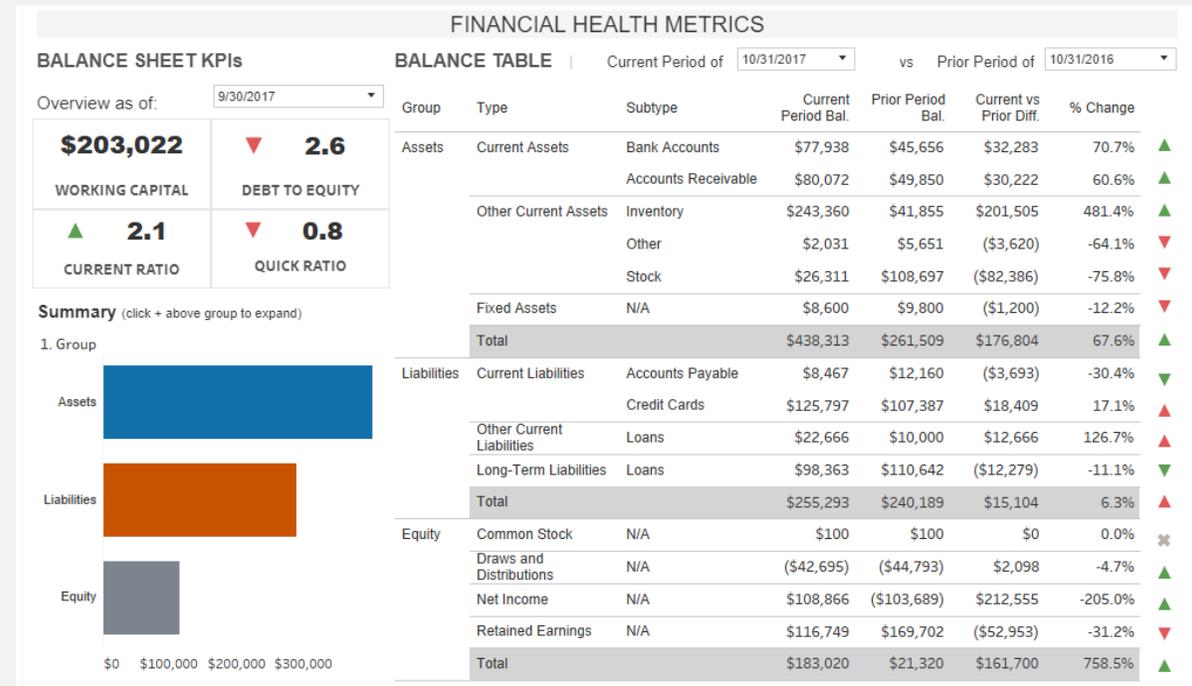
[Popular Accounting Apps](#)

# FINANCIAL HEALTH DASHBOARD

The purpose of the Financial Health Dashboard is to provide executives with a concise, "at-a-glance" view of key performance indicators (KPIs) from the company's balance sheet.

The scope of the dashboard is to present the four KPIs that are of highest importance to the company and offer the ability to compare summary level account balances for two points in time.

[Dashboard Link](#)



Dashboard created in its entirety by Keri James.  
Data desensitized to allow for public sharing.

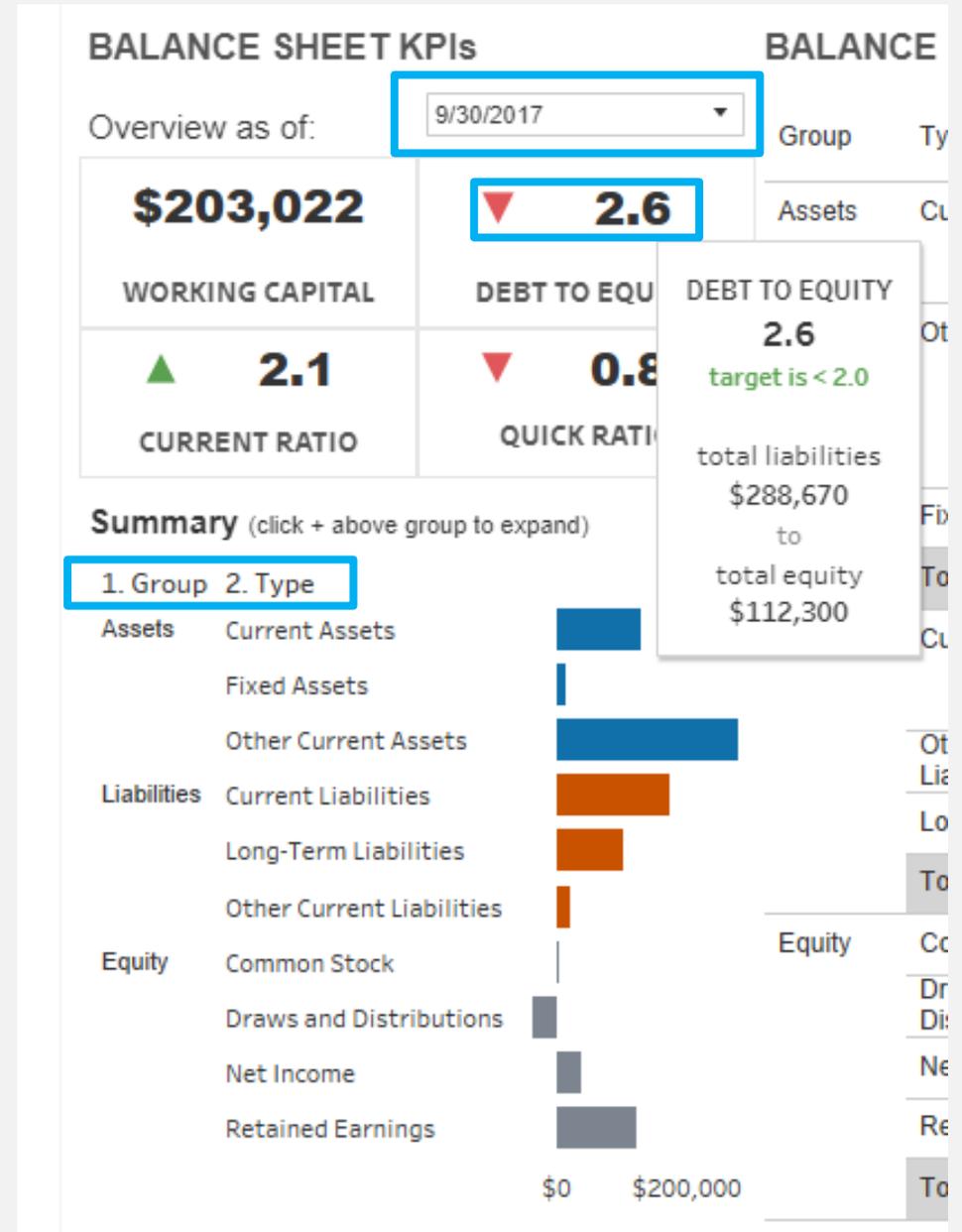
# FINANCIAL HEALTH DASHBOARD

## Key Features

The left side of the dashboard offers a drop down selection to view the balance sheet KPIs at specific points in time.

Red and green indicators visually attract the executive's eye to areas that either need attention or are performing well. The target for the metric is visible when hovering over the KPI.

The Summary level bar chart provides drill down capability to view account balances at a slightly more granular level of detail.



# FINANCIAL HEALTH DASHBOARD

## Key Features

The right side of the dashboard provides the ability to compare summary level information from the balance sheet for two points in time.

Red and green directional triangles draw attention to changes in account balances. The green triangle highlights accounts where financial health is improving while the red triangle draws attention to accounts that are regressing.

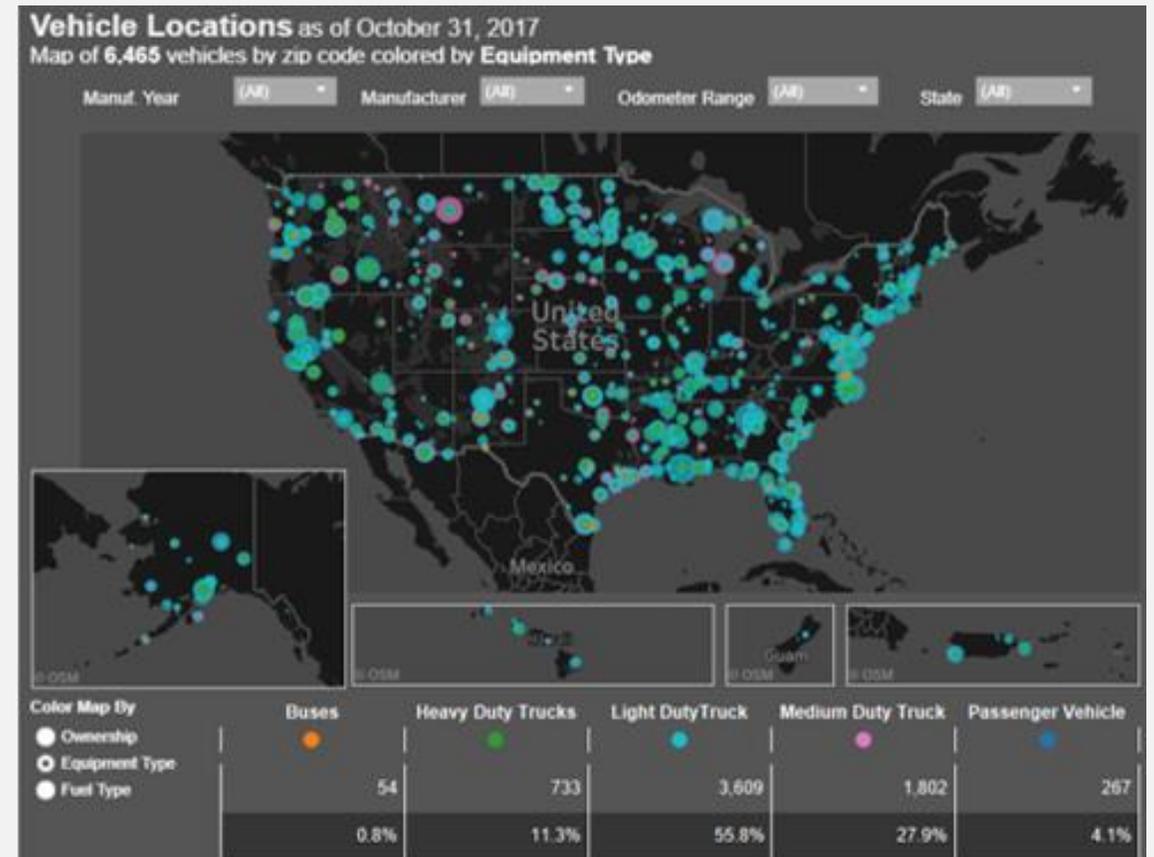
FINANCIAL HEALTH METRICS							
BALANCE TABLE		Current Period of	10/31/2017	vs	Prior Period of	10/31/2016	
Group	Type	Subtype	Current Period Bal.	Prior Period Bal.	Current vs Prior Diff.	% Change	
Assets	Current Assets	Bank Accounts	\$77,938	\$45,656	\$32,283	70.7%	▲
		Accounts Receivable	\$80,072	\$49,850	\$30,222	60.6%	▲
	Other Current Assets	Inventory	\$243,360	\$41,855	\$201,505	481.4%	▲
		Other	\$2,031	\$5,651	(\$3,620)	-64.1%	▼
		Stock	\$26,311	\$108,697	(\$82,386)	-75.8%	▼
Fixed Assets	N/A	\$8,600	\$9,800	(\$1,200)	-12.2%	▼	
Total			\$438,313	\$261,509	\$176,804	67.6%	▲
Liabilities	Current Liabilities	Accounts Payable	\$8,467	\$12,160	(\$3,693)	-30.4%	▼
		Credit Cards	\$125,797	\$107,387	\$18,409	17.1%	▲
	Other Current Liabilities	Loans	\$22,666	\$10,000	\$12,666	126.7%	▲
	Long-Term Liabilities	Loans	\$98,363	\$110,642	(\$12,279)	-11.1%	▼
	Total			\$255,293	\$240,189	\$15,104	6.3%
Equity	Common Stock	N/A	\$100	\$100	\$0	0.0%	✖
	Draws and Distributions	N/A	(\$42,695)	(\$44,793)	\$2,098	-4.7%	▲
	Net Income	N/A	\$108,866	(\$103,689)	\$212,555	-205.0%	▲
	Retained Earnings	N/A	\$116,749	\$169,702	(\$52,953)	-31.2%	▼
	Total			\$183,020	\$21,320	\$161,700	758.5%

# VEHICLE INVENTORY DASHBOARD

The purpose of the Vehicle Inventory Dashboard is to show the locations of an organization's vehicles and draw attention to the geographic areas with the most vehicles. The presentation of the inventory size and location also assists in locating specific types of equipment during emergency responses.

The scope of the dashboard required incorporating toggles and filters to present the most important dimensions of the data. These filters allow users to find under-utilized and over-utilized vehicles and aging vehicles in need of replacement.

[Dashboard Link](#)

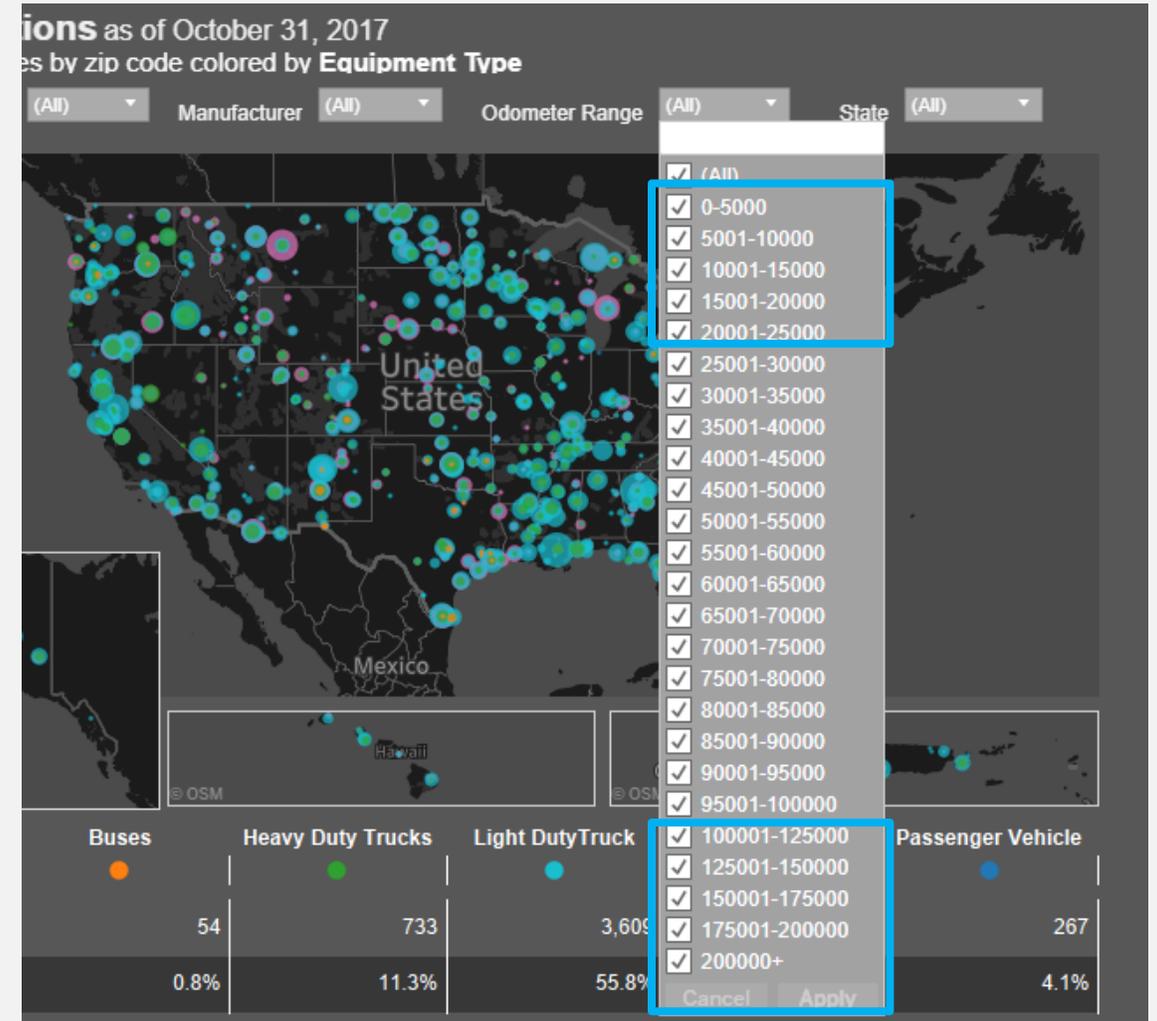


Dashboard created in its entirety by Keri James.  
Data desensitized to allow for public sharing.

# VEHICLE INVENTORY DASHBOARD

## Key Features

Odometer bins allow users to quickly find vehicle locations with low mileage and high mileage.



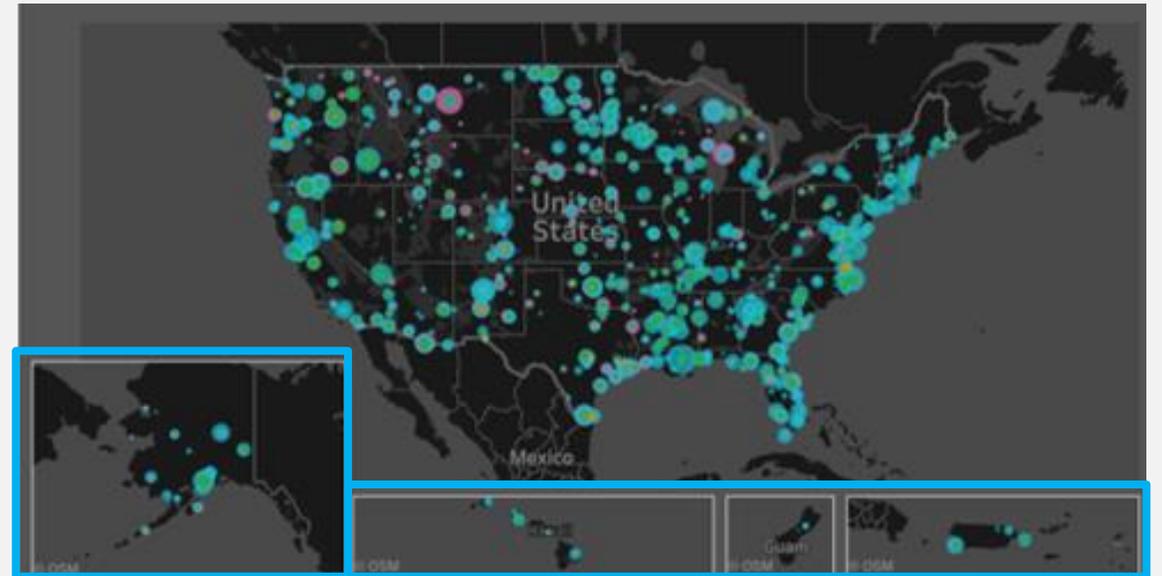
# VEHICLE INVENTORY DASHBOARD

## Key Features

Separate maps are created and strategically placed to maximize the use of the canvas.

Dashboard actions and quick filters hide maps when the data is filtered out of the view.

Maps resize and zoom to locations according to user selections.

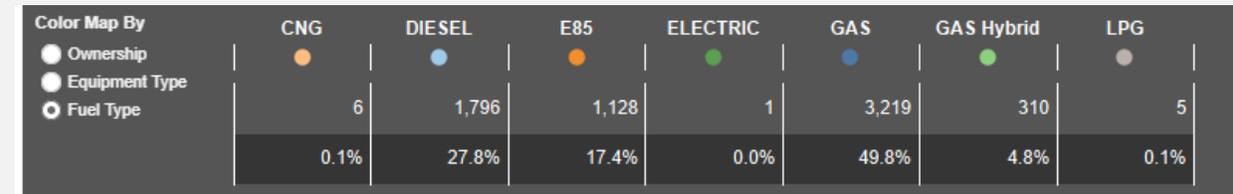
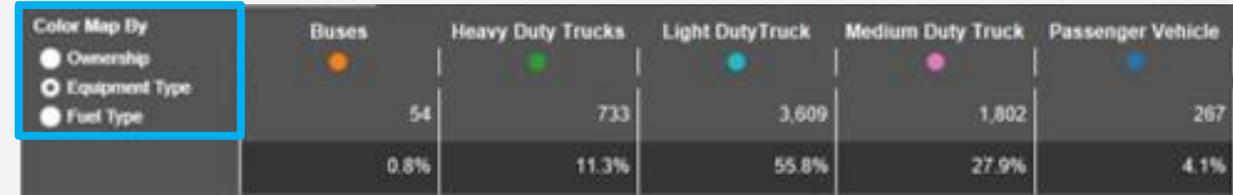


# VEHICLE INVENTORY DASHBOARD

## Key Features

Parameters provide flexibility to change the color of the map to reflect an alternate dimension within the data.

The color legends create interactivity. When a user clicks on a color, the map is filtered accordingly.

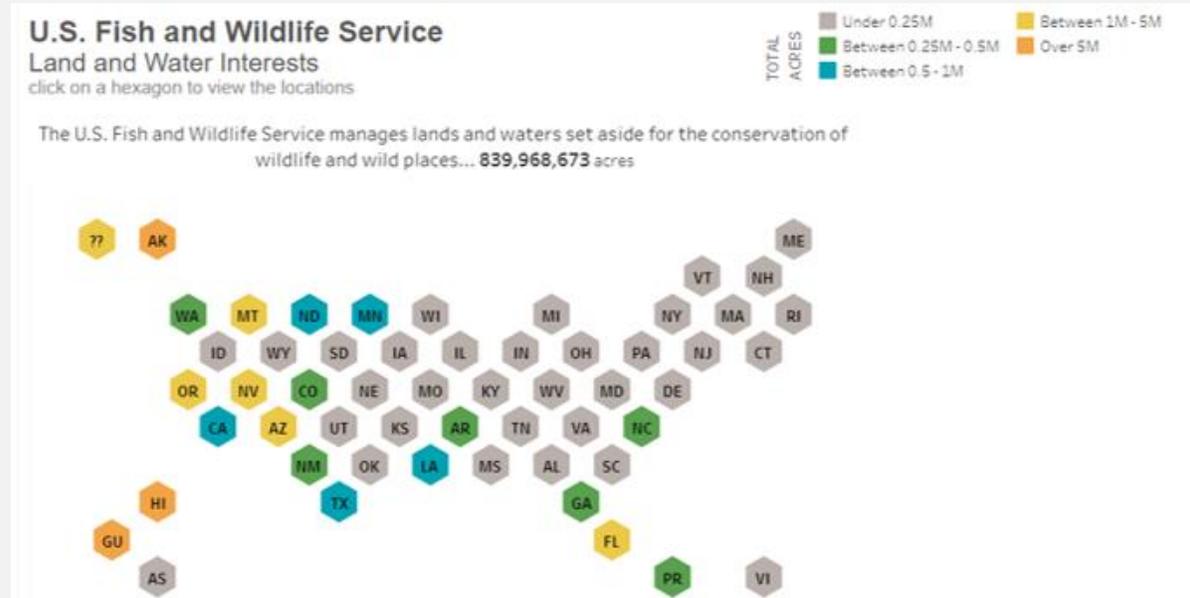


# LAND AND WATER INTERESTS DASHBOARD

The purpose of the Land and Water Interests Dashboard is to inform the public about the total acreage maintained by the U.S. Fish and Wildlife Service within each state.

The scope of the dashboard is to present a high level overview of the acreage by state and allow users to explore the individual land tracts within their state.

[Dashboard Link](#)



Dashboard created in its entirety by Keri James.  
Data available for public use on [data.gov](#).

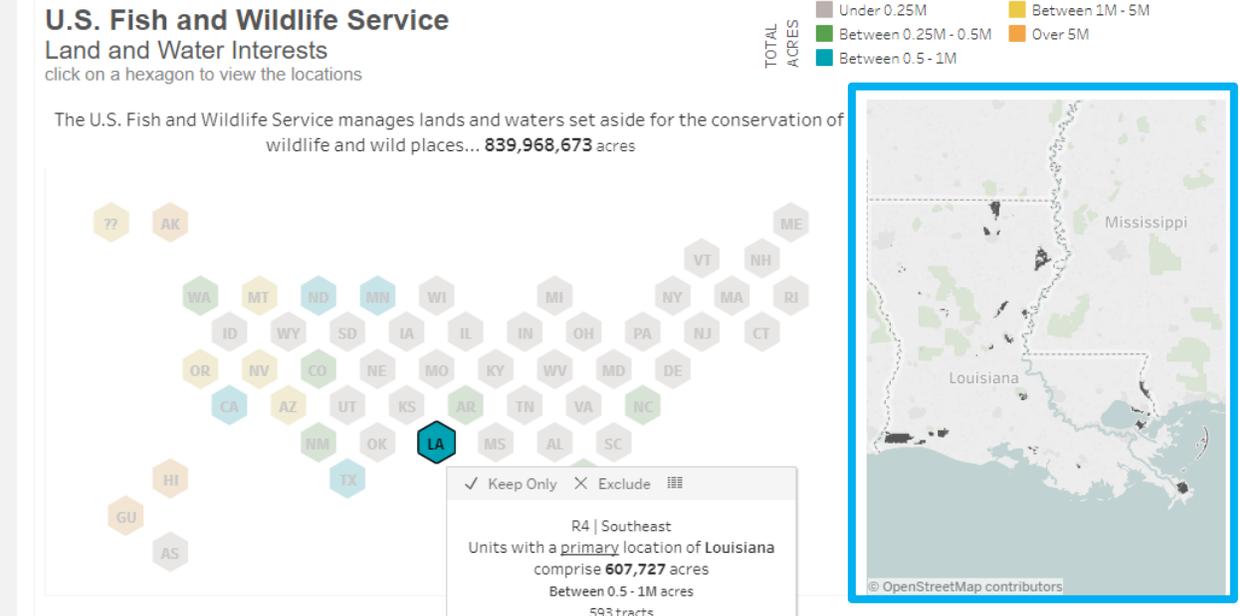
# LAND AND WATER INTERESTS DASHBOARD

## Key Features

A dashboard action generates a map for the state selected.

By incorporating the ArcGIS shp file, the user is able to view the land tracts within the selected state on the map to the right.

The tooltips provide the total acreage for the state as well as the total acreage for the specific land tract.

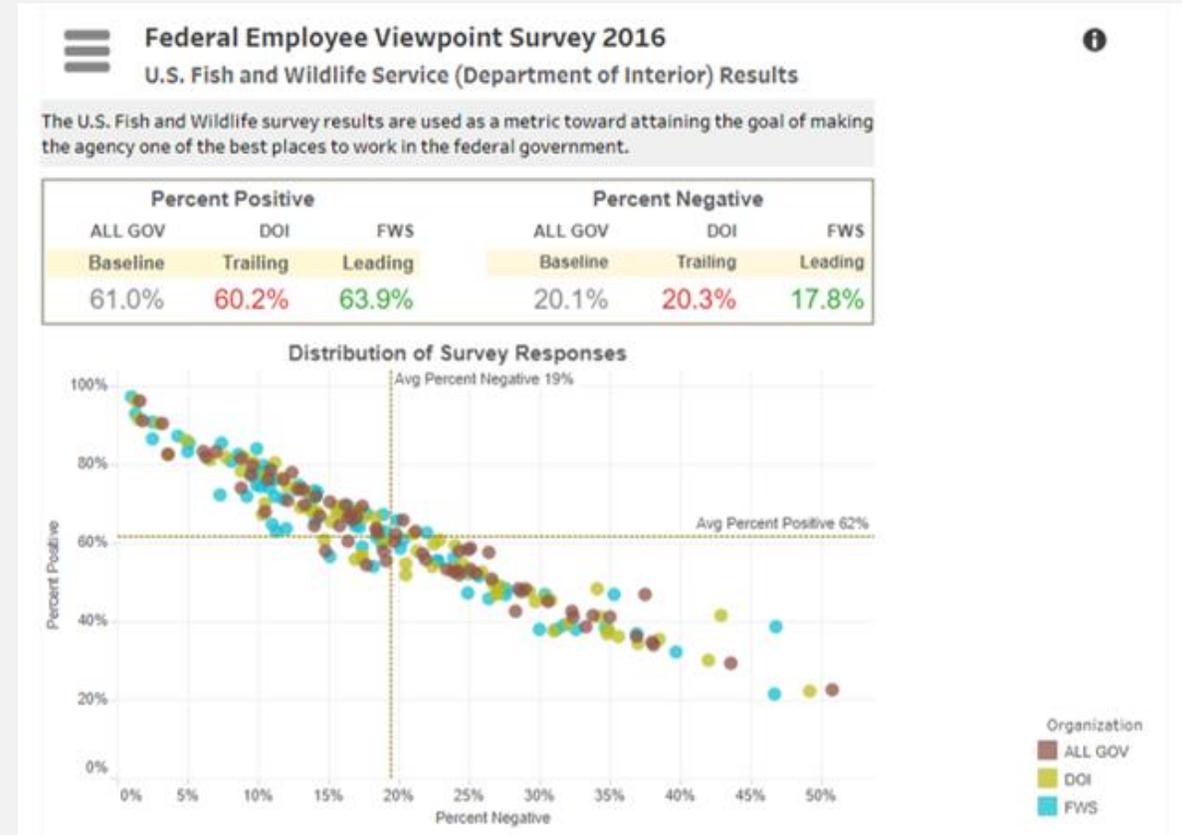


# FEDERAL EMPLOYEE VIEWPOINT SURVEY

The purpose of the Federal Employee Viewpoint Survey (FEVS) results dashboard is to compare the U.S. Fish and Wildlife Service's (Service) results with the Department of Interior and government-wide results. The analysis allows leadership to garner valuable insights about employees' perceptions of the organization as compared to the broader federal government workforce.

The scope of the dashboard is to compare the Service's results to the government-wide results as the baseline. The percent positive and percent negative averages for each survey question are important for identifying areas where leadership can drive change and increase employee engagement.

[Dashboard Link](#)

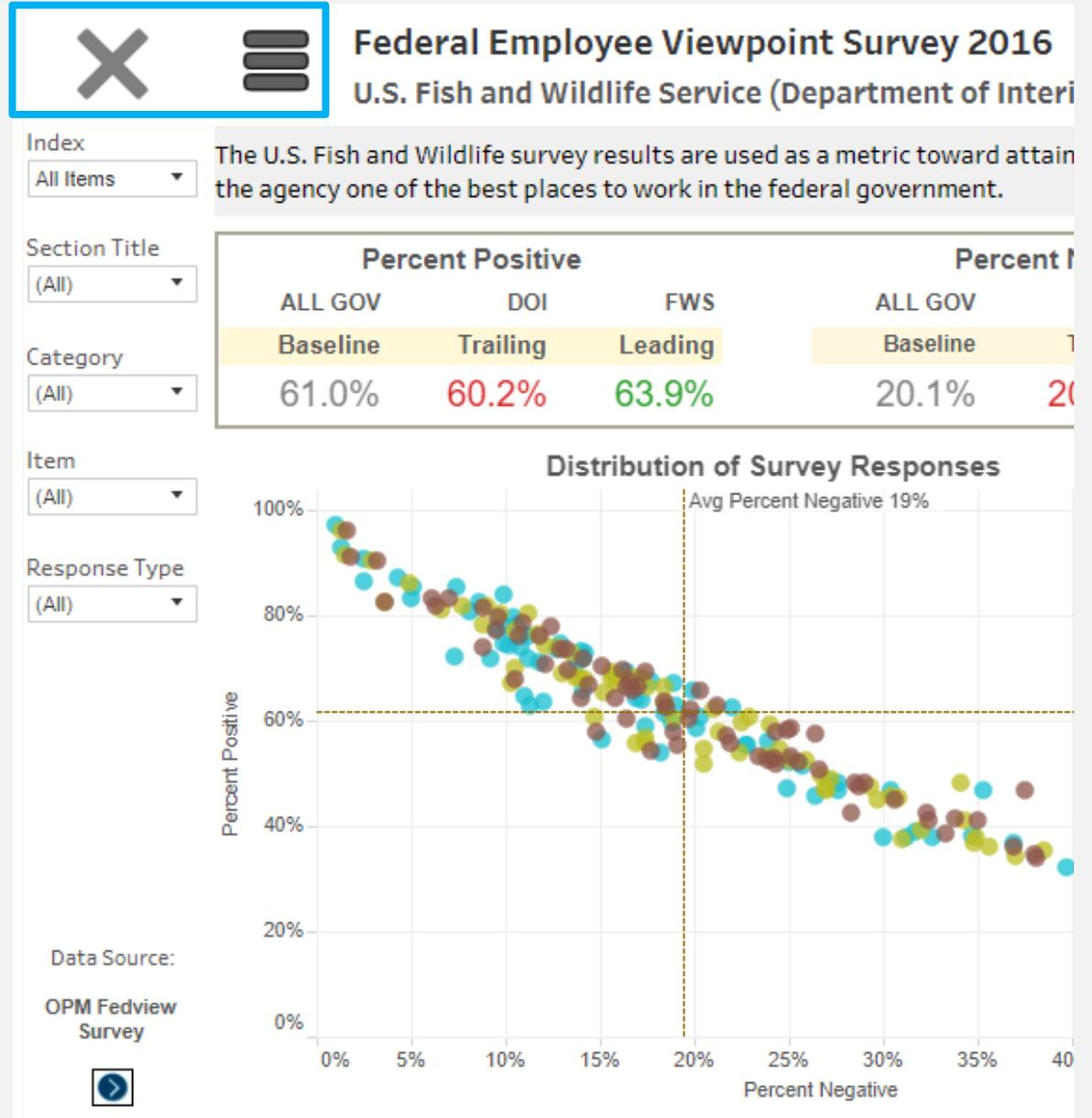


Dashboard created in its entirety by Keri James.  
Data available for public use on [bestplacestowork.org](http://bestplacestowork.org).

# FEDERAL EMPLOYEE VIEWPOINT SURVEY

## Key Features

A collapsible menu maximizes available space for the dashboard. The menu provides access to quick filters and links.

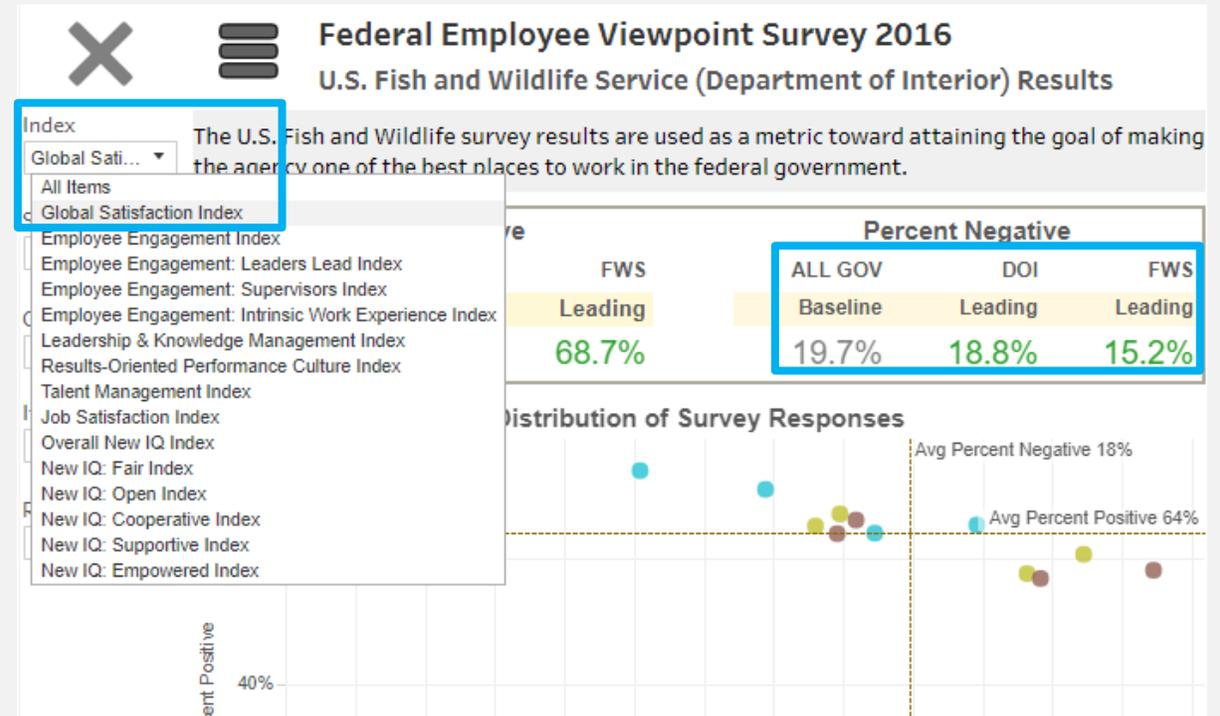


# FEDERAL EMPLOYEE VIEWPOINT SURVEY

## Key Features

An index parameter aggregates survey questions to allow for comparisons within the core survey areas such as leadership and overall satisfaction.

The DOI (Department of Interior) and FWS percent positive and percent negative overall totals reflect the index selected. The calculation updates indicate a leading or trailing performance status as compared to the government-wide results.

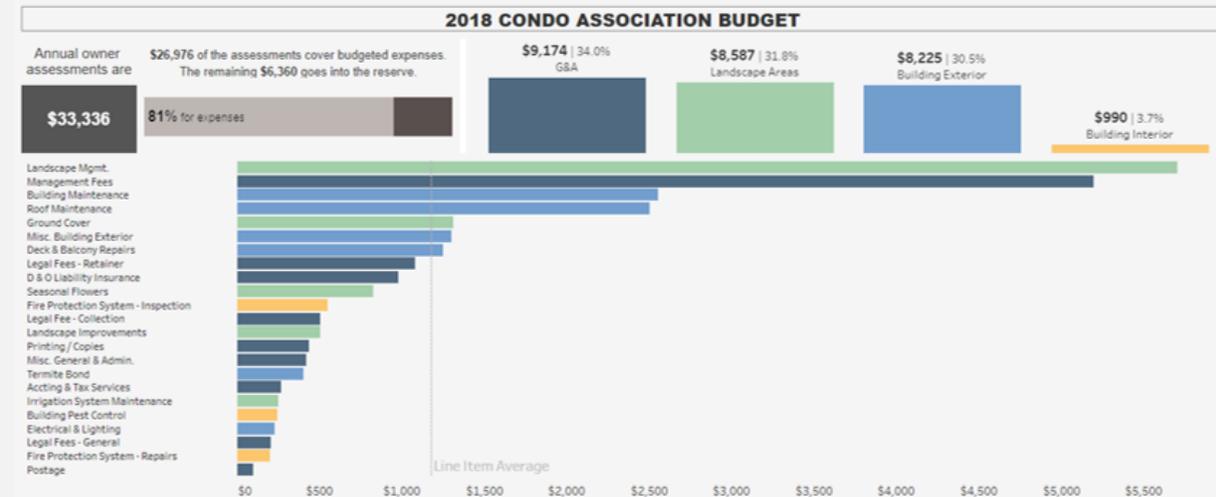


# CONDO ASSOCIATION BUDGET

The purpose of the Condo Association Budget dashboard is to help the community members reach an agreement on how the association should spend its funds in the upcoming year.

The scope of the dashboard is to highlight the total assessments for the year and the percentage which is proposed for spending on operational activities. The spending is summarized by four distinct categories.

[Dashboard Link](#)



Dashboard created in its entirety by Keri James.  
Data desensitized to allow for public sharing.

# CONDO ASSOCIATION BUDGET

## Key Features

One of the key features of the dashboard is its simplicity. The story is the focus.

Annual owner  
assessments are

**\$33,336**

**\$26,976** of the assessments cover budgeted expenses.  
The remaining **\$6,360** goes into the reserve.

**81%** for expenses



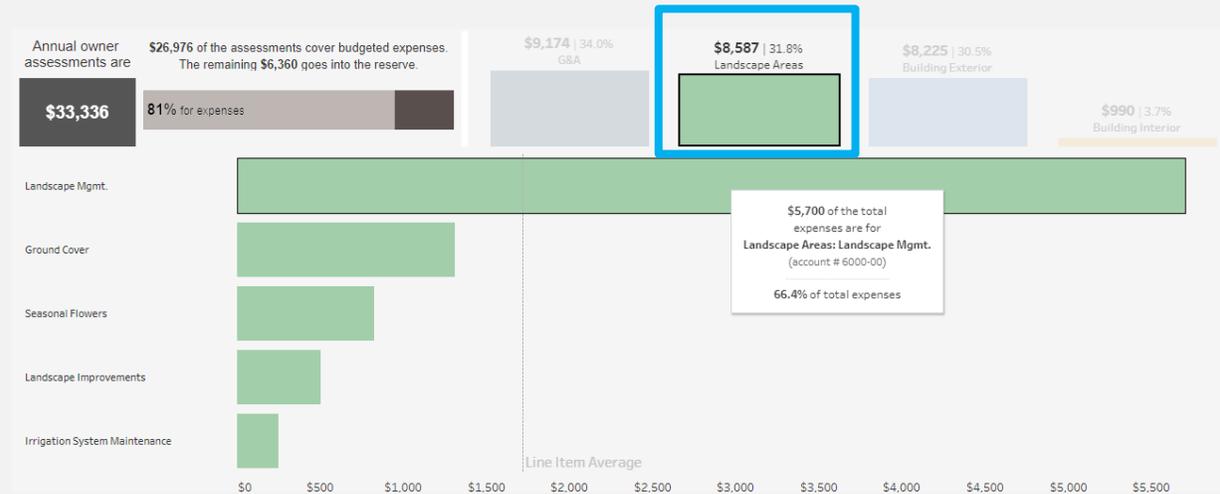
# CONDO ASSOCIATION BUDGET

## Key Features

The audience is kept at the forefront of the design. The bar charts are the most familiar and intuitive to the audience consuming the data.

Categorical colors for the bars allow the users to correlate the top row of aggregated data to the detailed line items in the lower chart.

Dashboard actions filter the detailed line items based upon the category selected. The percentage of total calculation updates relative to the category.

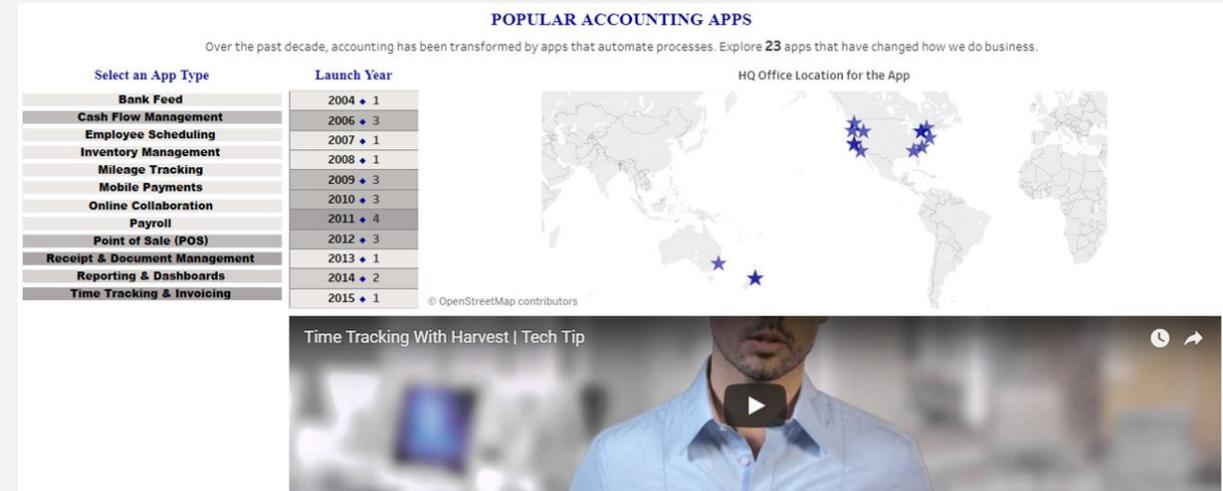


# POPULAR ACCOUNTING APPS

The purpose of the Popular Accounting Apps dashboard is to educate accounting firms and small business owners about some of the tools that are automating routine processes within the accounting function.

The scope of the dashboard is to summarize the apps by their primary offering. The year of development is incorporated into the presentation since consumers generally are more comfortable with apps that have been on the market for a longer period of time.

[Dashboard Link](#)



Dashboard created in its entirety by Keri James.  
Data manually collected using Google search functionality.

# POPULAR ACCOUNTING APPS

## Key Features

Dashboard actions are thoughtfully applied to ensure only the relevant apps appear in the results. For example, the relevant app icons appear only after the type selection is made.

A short demonstration of the app's benefits is available for viewing by clicking on the app icon and pressing play on the video.

### POPULAR ACCOUNTING APPS

Over the past decade, accounting has been transformed by apps that automate processes. Explore 3 apps that have changed how we do business.

Select an App Type	Launch Year	HQ Office Location for the App
Bank Feed		
Cash Flow Management		
Employee Scheduling	2004 ▾ 1	
Inventory Management		
Mileage Tracking		
Mobile Payments	2010 ▾ 1	
Online Collaboration		
Payroll		
<b>Point of Sale (POS)</b>		
Receipt & Document Management		
Reporting & Dashboards	2012 ▾ 1	
Time Tracking & Invoicing		

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