IBM Maximo MRO Inventory Optimization
Reports User Guide

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Contents
What are IBM Maximo MRO Inventory Optimization Reports ...........................................4
Navigate the Analytics page ...........................................................................................5
Customize your View .....................................................................................................6
View Report ..................................................................................................................7
Share Report ...............................................................................................................8
Export Report ............................................................................................................9
Copy Report ................................................................................................................10
Delete Report ............................................................................................................11
Edit Workbook Properties .........................................................................................12
Explore Data ..............................................................................................................13
Select Multiple Data Points .......................................................................................14
Quickly Filter and Sort Data .......................................................................................15
Use Legends to Highlight Data ...................................................................................16
Live_Export_Details ....................................................................................................17
Live_Inventory_Details ...............................................................................................19
Live_Inventory_Details_All_Fields ............................................................................21
Live_System_Usage ....................................................................................................22
Live_Workqueue_History ............................................................................................23
Snapshot_Audit_Log_History .....................................................................................24
Snapshot_Equipment_BOM_Details ...........................................................................25
Snapshot_Equipment_Issue_Details ..........................................................................26
Snapshot_Inventory_Bridge .......................................................................................28
Snapshot_Inventory_History ......................................................................................30
Snapshot_Issue_History ............................................................................................33
Snapshot_Item_Equipment_Details ..........................................................................35
Snapshot_Receipt_History ........................................................................................37
Snapshot_Review_History .........................................................................................38
Snapshot_Turnover ....................................................................................................40
Snapshot_Work_Order_History ..................................................................................41
Equipment via BOM Template ...................................................................................42
Equipment via Issues Template ................................................................................43
Export Details Template ...........................................................................................44
Inventory Details Template .......................................................................................45
Inventory Details (All Fields) Template .....................................................................46
What are IBM Maximo MRO Inventory Optimization Reports
IBM Maximo MRO Inventory Optimization has a reporting platform that offers rich data visualization tools to help you analyze your MRO data in a matter of seconds.

IBM Maximo MRO Inventory Optimization provides each client with a number of standard reports which offer a high-level overview of your organization's latest key metrics.

Using Tableau's visualization tools you can explore and compare different data sets in a report to gain more insight into specific events and make data-driven business decisions quickly.

You can also create custom reports and new visualizations using the platform's standard templates which can be easily modified using the Tableau Web Editor.
Navigate the Analytics page

Reports are organized into different Categories seen on the left navigation pane. The number displayed next to each category indicates how many reports it contains, which also includes reports that have been hidden from view. You can further sort and filter through the reports listed in each category by choosing one of the options across the top of the screen:

- **Reports by Category** - Lists reports in alphabetical order.
- **Recently Viewed** - Lists reports according to when they were last viewed.
- **Favorites** - Displays all reports marked as favorite.
- **Custom** - Displays only user-created custom reports.

**Note:** Standard categories associated with IBM Maximo MRO Inventory Optimization's standard reports cannot be modified or deleted. You can create new categories for custom reports or save them in any of the existing categories.
Customize your View
You can change the way reports appear on the Analytics page a few different ways.

Use Personalize View
1. Click **Personalise View** next to the name of the category.
2. Remove the check mark from reports you wish to hide from view. You can also use **Select All** to show or hide all the reports in a category.
3. Click **Save View** to accept the changes.
   **Note:** Hidden reports will still be reflected in the total number of reports shown next to each category name on the left navigation pane.

Mark a Report as a Favorite
1. Click the star next to the name of report you want to mark as a favorite.
2. A yellow favorite star indicates that a report has been marked as a favorite. Clicking on it again removes the report from the favorites list.
3. Click **Favorites** on the top of the page to quickly display your most used reports in the selected category.

Toggle Between Thumbnail and List view
1. Click the toggle button on the upper right of the Analytics page to switch between thumbnail and list view.
2. List view only shows the report name and a short description. Thumbnail view includes a preview of the visualization.
**View Report**

IBM reports allow you to quickly visualize your organization’s latest key metrics.

Hover the thumbnail preview of the report you want to view and click **Run Report**.

You can also click the report name itself to run the report.

A report can contain multiple tables, charts or graphs. These types of reports are called dashboards, and allow you to view several worksheets in a single layout.

If a report contains more than one worksheet tab exposed, you can switch between different sheet pages by clicking on one of the worksheet names listed below the name of the report.
Share Report
You can share any report with other IBM Maximo MRO Inventory Optimization Suite users, as well as non-registered guest users.

To share a report, follow these steps:

Click **Run Report** on the report that you want to share.

Click **Share** on the upper left of the report window.

In the **Share With** field, enter the email addresses of the people you want to share the report with. Use a semicolon to separate individual recipients.

Type in a message, then click **Share Report**. Each recipient will receive an email containing a unique link to the report.

**Guest Users**
Links to reports shared with guest users who aren’t registered users of IBM Maximo MRO Inventory Optimization are valid for up to 30 days.

Once a guest user views a shared report, they will have another 24 hours to re-open the report. Otherwise, their guest access tokens will expire. The 24-hour grace period resets every time the report is viewed.

Guest users can view the report, as well as highlight or remove selected data points for further analysis.

Guest users only have access to the shared report and are only allowed to use basic report features, namely **Export, Reset** and **Refresh**.

Only registered users can navigate away from the report window and view other reports, as well as **Share** and **Edit** reports.
Export Report

You can save a copy of the current report in view or download the data it is based on by using the Export function.

In the report window, click Export on the upper left.
On the drop-down menu that appears, you can select one of two export options:

- **PDF** – to save a copy of a report to PDF format. Choose this option if you need to make a printout of the report in view.
  You can customize how data is displayed on the PDF page/s in the Download PDF window by changing **Paper Size** and **Scaling** options.

If there are multiple reports on the Dashboard, you can select which to save by clicking on Sheets in Dashboard.

To export all the reports in view to PDF, click on Sheets in Workbook.

- **Data** – to download or extract the underlying data in the report to CSV format. Choose this option if you need to open the data in Excel or any other spreadsheet software.
Copy Report

Users can make a duplicate of any report listed in any category. Copies of standard reports can be edited to suit your exact needs and preferences.

To make a copy of a report, follow these steps:

1. Hover over the icon right next to a report name and select Copy.
2. On the Workbook Properties window, fill in the following required fields:
   - Name – enter a new unique name for the report.
   - Category – enter the name of category you want to save the report in.
   - Description (optional) – enter a short description to help you identify the report in the reports list.
3. Click Copy to save the new report.

   Note: You can edit the Workbook Properties of any custom report at any time moving your cursor over the icon next to the report name and selecting Edit.
Delete Report
You can permanently delete any custom report from the system. Standard reports provided by IBM do not have this option.
To permanently delete a report, follow these steps:
1. Move your cursor over the pen icon next to the report name and select Delete.
2. On the dialog box that appears, click on Delete to confirm the action.
3. A confirmation message should appear after the report has been successfully deleted.
   Note: Any user can delete any custom report created by other users. Once a report has been deleted from the system it can no longer be accessed or viewed by anyone.
Edit Workbook Properties

Users can change the Workbook Properties of any custom report at any time.

1. Move your cursor over the icon next to the report name and click on Edit.
2. In the Workbook Properties window you can change the following:
   o **Name** – enter a new unique name for the report.
   o **Category** – enter the name of an existing category to save the report there, or create a new custom category.
   o **Description** – enter a short description to help you identify the report.
3. Click Save to accept the changes.

   **Note:** Any changes made to a report’s Workbook Properties will be seen by all users who have access to the report.
Explore Data

Hover over a data point to bring up a tooltip that provides additional information. Click a data point to highlight it and bring up additional options.

- **Keep Only** - display only the selected data point.
- **Exclude** - remove the highlighted data from view.
- **View Data** - open a new window to display the actual data used.

After exploring or interacting with the data, you can click on **Reset** to return to the report's original view.

View Data

Click **View Data** to see the underlying data used in your selected data points in more detail.

- Click on the **Summary** tab to see the aggregated data used in your selection.
- Click the **Full data** tab to see the values in each row of the selected data.
- Select **Show all columns** to display all the underlying data used in the selected data points.
- Click **Download all rows as a text file** to save the displayed data in **CSV format**.
Select Multiple Data Points

Click and drag your cursor to select several data points at once. You can also press and hold Ctrl while selecting items to create a custom group. This is particularly useful when you need to select nonadjacent data points. Hover your cursor over the highlighted data points and you’ll see an expanded tooltip. Move your cursor over a highlighted data point to display additional details via a tooltip. The expanded tooltip contains the following options:

- **Keep Only** - Limits the view to show only the selected data points.
- **Exclude** - Removes the highlighted data from view.
- **View Data** - Opens a new window that displays the actual data used.
- **Sort** - Rearranges the selected data in ascending or descending order.
- **View Data** - Opens a window showing the highlighted data in more detail.

To return to a report's full view, click **Reset** on top of the report window. Click on **Refresh** to reload the report using the latest data available.
Quickly Filter and Sort Data
You can quickly filter and sort the data in a visualization using different control options.

Filter Options
Reports can feature different types of filters which let you narrow down the visualizations to show only the data that you want to see. The common types of filter controls featured in IBM Maximo MRO Inventory Optimization reports include:

- **Sliders**
  
  | Filter Top 20: | Average Stockout Cost: 6,890,267 | Average Days Overdue: 309 |

- **Drop-down menus and checklists**

- **Radio buttons**

  - All
  - Last 3 Months
  - Last 6 Months
  - Last 12 Months

  **Inventory Value Using:**
  - Stock on Hand
  - Available Stock

Quick Sort
You can quickly change the sort order of the items in view using the Sort buttons that appear when you hover over an axis, field label or header.

Date Drill Down
Reports that feature dates can have a Drill Down or Drill Up option when you hover your cursor near the left-most corners of a chart.
Use Legends to Highlight Data
Click on any legend description to quickly select and interact with all the corresponding data points that belong to the same category.
On the tooltip that appears, you can select **Keep Only** to isolate the data from the rest of the group, or **Exclude** to remove the selected data from view.
You can also press and hold **Ctrl** while selecting legend icons to highlight several data sets at a time.

Two-Way Highlighting
Click the icon to switch to two-way highlighting. The icon switches to whenever two-way mode is active.
Two-way mode lets you highlight subsets of data using either the legends or the marks themselves.
You can also press and hold **Ctrl** while clicking either the data subsets or legend icons to select multiple items at a time. When you highlight a mark, the matching legend will also be highlighted, and vice versa.
Click on **Reset** to undo all changes made to a report and return to its default view.
Live_Export_Details

TABLES INCLUDED
Export Details (this table contains Live data and is not a monthly snapshot)

DATA SOURCE OBJECTIVE
You could use this data source to:
- Review information regarding up-to-date Exports as they occur
- View items that have been Reviewed and Exported over time, including the latest exports
- Monitor the user acceptance of using IBM Maximo MRO Inventory Optimization Recommendation by Optimal Optimal Best (OOB) status
- View details of Exports including Export Type and by User

CALCULATIONS IN DATA SOURCE

Last Export Reorder Code 1
Returns the Reorder Code 1 which was recorded for the item during the previous export of the item record.

Last Export Reorder Code 2
Returns the Reorder Code 2 which was recorded for the item during the previous export of the item record.

Last Recorded ROP
Returns the Reorder Point which was recorded for the item during the previous export of the item record.

Last Recorded ROQ
Returns the Reorder Quantity which was recorded for the item during the previous export of the item record.

Corporate Current Stock Value
Calculates the current stock value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Stock Value by the Corporate Currency Rate.

Corporate Surplus Value
Calculates the surplus value of stock in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Surplus Value by the Corporate Currency rate.

Corporate Current Average Stock Value
Calculates the current average stock value in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Current Average Stock Value by the Corporate Currency rate.

Corporate Recorded Average Stock Value
Calculates the recorded average stock value in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Recorded Average Stock Value by the Corporate Currency rate.

Corporate Current Holding Cost
Calculates the current holding cost in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Current Holding Cost by the Corporate Currency rate.

Corporate Recorded Holding Cost
Calculates the recorded holding cost in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Recorded Holding Cost by the Corporate Currency rate.
**Corporate Current Purchase Order Cost**
Calculates the current purchase order cost in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Current Purchase Order Cost by the Corporate Currency rate.

**Corporate Recorded Purchase Order Cost**
Calculates the recorded purchase order cost in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Recorded Purchase Order Cost by the Corporate Currency rate.

**Corporate Current Stockout Cost**
Calculates the current stockout cost in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Current Stockout Cost by the Corporate Currency rate.

**Corporate Recorded Stockout Cost**
Calculates the recorded stockout cost in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Recorded Stockout Cost by the Corporate Currency rate.

**Corporate Current Total Cost**
Calculates the current total cost in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Current Total Cost by the Corporate Currency rate.

**Corporate Recorded Total Cost**
Calculates the recorded total cost in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Recorded Total Cost by the Corporate Currency rate.

**Corporate Available Stock Value**
Calculates the available stock value in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Available Stock Value (Available Quantity * Average Price) by the Corporate Currency rate.

**Corporate Max Holding Value**
Calculates the max holding value in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Max Holding Value (Current Max * Average Price) by the Corporate Currency rate.

**Corporate Minimum Holding Value**
Calculates the minimum holding value in Corporate Currency. If the Corporate Currency is greater than zero, then multiply the Minimum Holding Value (Host Reorder Code 1 * Average Price) by the Corporate Currency rate.

**Is Reviewed and Exported Same Month**
This flag is set for item records that have had both their most recent review and export within the same month. 1 = Item was reviewed and exported in the same month, 0 = Last Item review was not in the same month as the export, Include both (ie. no filter) = All Item records.

**OOB (Optimal Optimal Best)**
Determines the Reorder strategy of an item. If an item's Reorder Point is set to "Optimal", its Reorder Quantity set to "Optimal" and its Forecast Method set to "Best" then the value is set to "OOB". Otherwise, it is set to "Not OOB".
Live_Inventory_Details

TABLES INCLUDED
Item (Material) details for current month

DATA SOURCE OBJECTIVE
You could use this data source to:
- Report on current Inventory Values
- Segment current Inventory by Division (Company), Site (Plant), Control Segment, Criticality and more

CALCULATIONS IN DATA SOURCE

Corporate Current Stock Value
Calculates the current stock value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Stock Value by the Corporate Currency Rate.

Corporate Surplus Value
Calculates the surplus value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Surplus Value by the Corporate Currency Rate.

Corporate Current Average Stock Value
Calculates the current average stock value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Average Stock Value by the Corporate Currency Rate.

Corporate Recorded Average Stock Value
Calculates the recorded average stock value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Recorded Average Stock Value by the Corporate Currency Rate.

Corporate Current Holding Cost
Calculates the current holding cost in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Holding Cost by the Corporate Currency Rate.

Corporate Recorded Holding Cost
Calculates the recorded holding cost in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Recorded Holding Cost by the Corporate Currency Rate.

Corporate Current Purchase Order Cost
Calculates the current purchase order cost in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Purchase Order Cost by the Corporate Currency Rate.

Corporate Recorded Purchase Order Cost
Calculates the recorded purchase order cost in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Recorded Purchase Order Cost by the Corporate Currency Rate.

Corporate Current Stockout Cost
Calculates the current stockout cost in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Stockout Cost by the Corporate Currency Rate.

Corporate Recorded Stockout Cost
Calculates the recorded stockout cost in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Recorded Stockout Cost by the Corporate Currency Rate.

Corporate Current Total Cost
Calculates the current total cost in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Total Cost by the Corporate Currency Rate.

Corporate Recorded Total Cost
Calculates the recorded total cost in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Recorded Total Cost by the Corporate Currency Rate.

**Corporate Available Stock Value**
Calculates the available stock value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Available Stock Value (Available Quantity * Average Price) by the Corporate Currency Rate.

**Corporate Maximum Holding Value**
Calculates the maximum holding value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Maximum Holding Value (Current Maximum * Average Price) by the Corporate Currency Rate.

**Corporate Minimum Holding Value**
Calculates the minimum holding value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Minimum Holding Value (Host Reorder Code 1 * Average Price) by the Corporate Currency Rate.

**Is Issued Greater Than 2 Years Ago**
This flag is set for items that were last issued more than 2 years ago. 1 = Item was last issued more than 2 years ago, 0 = item has been issued within the last 2 years, include both (i.e. no filter) = All item records.

**Is Issued Greater Than 3 Years Ago**
This flag is set for items that were last issued more than 3 years ago. 1 = Item was last issued more than 3 years ago, 0 = item has been issued within the last 3 years, include both (i.e. no filter) = All item records.

**Is Issued Greater Than 4 Years Ago**
This flag is set for items that were last issued more than 4 years ago. 1 = Item was last issued more than 4 years ago, 0 = item has been issued within the last 4 years, include both (i.e. no filter) = All item records.

**Is Issued Greater Than 5 Years Ago**
This flag is set for items that were last issued more than 5 years ago. 1 = Item was last issued more than 5 years ago, 0 = item has been issued within the last 5 years, include both (i.e. no filter) = All item records.
Live_Inventory_Details_All_Fields

TABLES INCLUDED
Item (Material) details for current month

DATA SOURCE OBJECTIVE
This data source is specifically written to expose all fields in the Item table for reporting.

You could use this data source to:
- Report on current Inventory Values
- Segment current Inventory by Division (Company), Site (Plant), Control Segment, Criticality and more
Live_System_Usage

TABLES INCLUDED
System Usage Event History
System Usage Event Type
System User Details

DATA SOURCE OBJECTIVE
You could use this data source to:
• Analyse the usage workflow for a User
• Review the time a User has spent in OAS as a whole for each Event Type (Task)
• Monitor System Usage over time

CALCULATIONS IN DATA SOURCE
Last Date
Determines the date of the last occasion that the User accessed the system.

Time Difference
Calculates the length of time, in seconds, between the user's current login and their next most recent login.
Live_Workqueue_History

TABLES INCLUDED
Issues History
Item (Material) History

DATA SOURCE OBJECTIVE
This data source is specifically written for the purpose of reporting on Workqueues. You can use this data to:
- Analyse the outstanding review percentage of each workqueue by priority
- Review workqueues by set/group
- Analyse workqueues that have been reviewed in the current month

CALCULATIONS IN DATA SOURCE

Workqueue Set Name
Determines the label to be used for the Workqueue being viewed or worked on by the user. If the category being used is “All Sets” then that will be the label applied to the Workqueue. Otherwise, it will be the Display Name of the category.

Is Review This Month
This is a flag set for Workqueue records which had their most recent review on the day of, or after, the last PU. 1 = Record was last reviewed on the same day, or after, the last PU, 0 = Record was last reviewed before the most recent PU, include both (i.e. no filter) = All Workqueue records.
Snapshot_Audit_Log_History

**TABLES INCLUDED**
Audit Log History
Audit Types
System User Details
System Text Details
System Text Values
System Text Locales

**DATA SOURCE OBJECTIVE**
You could use this data source to:
- Analyse the Audit events for a selected User
TABLES INCLUDED
Current Equipment details
Bill of Materials
Item (Material) details for current month

DATA SOURCE OBJECTIVE
You could use this data source to:
- List the Items (Materials) that relate to an Equipment via Bill of Materials (BOMs)
- List the equipment and filter by Responsible Person/Custodian, Equipment Type or Equipment Status
- Review items relating to Inactive Equipment

CALCULATIONS IN DATA SOURCE
Corporate Currency Stock Value
Calculates the Current Stock Value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Stock Value by the Corporate Currency Rate.
Snapshot_Equipment_Issue_Details

TABLES INCLUDED
Current Equipment details
Issues History
Item (Material) details for current month

DATA SOURCE OBJECTIVE
You could use this data source to:
• List the Items (Materials) that relate to an Equipment via Issues
• List the equipment and filter by Responsible Person/Custodian, Equipment Type or Equipment Status
• Review items relating to Inactive Equipment

CALCULATIONS IN DATA SOURCE
Corporate Currency Stock Value
Calculates the Current Stock Value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Stock Value by the Corporate Currency Rate.

Issue Value
(Issue Size x Issue Price) as an absolute calculation, to report both Returns (where Issue Size is < zero) and Issues as a positive figure in Reports eg. Executive Dashboard. If the Corporate Currency Rate is greater than zero, then multiply the absolute calculation above by the Corporate Currency Rate.

Is Issue This Year
This is a flag that can be used as a filter to only display Issues/Returns that have been created from within 1 year before the latest PU (Update Date). 1 = Issued/Returned This Year, 0 = Not Issued/Returned This Year, Include both (ie. no filter) = All Issues/Returns.

Is Issue Last Year
This is a flag that can be used as a filter to only display Issues/Returns that have been created between 1-2 years before the latest PU (Update Date). 1 = Issued/Returned Last Year, 0 = Not Issued/Returned Last Year, Include both (ie. no filter) = All Issues/Returns.

Is Issue Overdue
This is a flag that can be used as a filter to only display Issues/Returns where the Due Date is less than the Issue Date. 1 = Issue is Overdue, 0 = Issue is NOT Overdue, Include both (ie. no filter) = All Issues/Returns

Issue Type
Determines if the record is an Issue or a Return. If the Issue Size is less than zero then this signifies a Return and all other records are Issues.

Days Overdue
Calculates the number of days where the Issue Date is past the Due Date.
**Stockout Cost**
Calculates the Current Stockout Cost in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Stockout Cost by the Corporate Currency Rate.

**Issue Price**
Calculates the Issue Price in Corporate Currency, in the case where a user may want to see the Corporate Issue Price separate to the Issue Value. If the Corporate Currency Rate is greater than zero, then multiply the Issue Price by the Corporate Currency Rate.

**Number of Overdue Issues**
If an Issue/Return is overdue then count the record.
This data source is specifically written for the purpose of reporting on Inventory Value Changes (Inventory Movement) by Category from the last month to current month. You can use this data to pinpoint the reason for the Inventory Movement by the following categories:

- New Items Added
- Optimisation Value
- Price Change
- Excess Stock Reductions
- Other

**CALCULATIONS IN DATA SOURCE**

**Starting Surplus Value**
Calculation of the value of surplus one year before the latest PU (Update Date), in the corporate currency at that time. If the Corporate Currency rate was greater than zero then multiply the Surplus Value by the respective Corporate Currency Rate.

**Starting Average Price**
Calculation of the average price of the item one year before the latest PU (Update Date), in the corporate currency at that time. If the Corporate Currency rate was greater than zero then multiply the Average Price by the respective Corporate Currency Rate.

**Starting Stock Value**
Calculation of the Current Stock Value one year before the latest PU (Update Date), in the corporate currency at that time. If the Corporate Currency rate was greater than zero then multiply the Current Stock Value by the respective Corporate Currency Rate.

**Starting Derived Stock Value**
Derivation of the value of stock one year before the latest PU (Update Date) by multiplying current stock on hand from one year ago by the average price (SOH * AvgPrice) available one year ago, expressed in the Corporate Currency at that time. If the Corporate Currency rate is greater than zero then multiply the Starting Derived Stock Value by the respective Corporate Currency Rate.

**Ending Surplus Value**
Calculation of the value of surplus one day before the latest PU (Update Date), in the corporate currency. If the Corporate Currency rate is greater than zero then multiply the Surplus Value by the Corporate Currency Rate.

**Ending Average Price**
Calculation of the average price of the item one day before the latest PU (Update Date), in the corporate currency. If the Corporate Currency rate is greater than zero then multiply the Average Price by the Corporate Currency Rate.
**Ending Stock Value**
Calculation of the Current Stock Value one day before the latest PU (Update Date), in the corporate currency. If the Corporate Currency rate is greater than zero then multiply the Current Stock Value by the Corporate Currency Rate.

**Ending Derived Stock Value**
Derivation of the value of stock one day before the latest PU (Update Date) by multiplying current stock on hand from that day by the average price (SOH * AvgPrice) available that same day, expressed in the Corporate Currency. If the applicable Corporate Currency rate is greater than zero then multiply the Derived Stock Value by the Corporate Currency Rate.

**Bridge Category**
Depending on the state of change of several other fields (Item Snapshot Dates, Host Reorder Points, Stock on Hand, Average Unit Price, Surplus Values) the designation of Bridge Category is determined. Possible Bridge Category values are ‘New Items Added’, ‘Optimisation Value’, ‘Price Change’, ‘Excess Stock Reductions’, ‘Below Min Variance’ and ‘Other’. 
Snapshot_Inventory_History

Tables Included
Item (Material) details for current month
Item (Material) History

Data Source Objective
You could use this data source to:
• Report on historical Inventory Values over time
• Report on Surplus Values over time
• Analyse stock increases and decreases from a given point in time
• Monitor changes in Criticality from one month to another

Calculations
IsCurrentMonth
This is a flag that can be used as a filter to only display inventory records that have been created within the same month as the latest PU (Update Date).
1 = Record is from the same month as the latest PU, 0 = Record is NOT from the same month as the latest PU, Include both (ie. no filter) = All Inventory Records

IsLastMonth
This is a flag that can be used as a filter to only display inventory records that have been created within the month before the latest PU (Update Date).
1 = Record is from the month before the latest PU, 0 = Record is NOT from the month before the latest PU, Include both (ie. no filter) = All Inventory Records

Is1YearAgo
This is a flag that can be used as a filter to only display inventory records that were created one year before the latest PU (Update Date).
1 = Record is from the year before the latest PU, 0 = Record is NOT from the year before the latest PU, Include both (ie. no filter) = All Inventory Records

IsLast12Months
This is a flag that can be used as a filter to only display inventory records that have been created within the last 12 months before the latest PU (Update Date).
1 = Record was created within the last 12 months before the latest PU, 0 = Record was NOT created within the last 12 months before the latest PU, Include both (ie. no filter) = All Inventory Records

IsLast24Months
This is a flag that can be used as a filter to only display inventory records that have been created within the last 24 months before the latest PU (Update Date).
1 = Record was created within the last 24 months before the latest PU, 0 = Record was NOT created within the last 24 months before the latest PU, Include both (ie. no filter) = All Inventory Records

IsLast36Months
This is a flag that can be used as a filter to only display inventory records that have been created within the last 36 months before the latest PU (Update Date).
1 = Record was created within the last 36 months before the latest PU, 0 = Record was NOT created within the last 36 months before the latest PU, Include both (ie. no filter) = All Inventory Records
**IsLast48Months**
This is a flag that can be used as a filter to only display inventory records that have been created within the last 48 months before the latest PU (Update Date).
1 = Record was created within the last 48 months before the latest PU, 0 = Record was NOT created within the last 48 months before the latest PU, Include both (ie. no filter) = All Inventory Records

**IsLast60Months**
This is a flag that can be used as a filter to only display inventory records that have been created within the last 60 months before the latest PU (Update Date).
1 = Record was created within the last 60 months before the latest PU, 0 = Record was NOT created within the last 60 months before the latest PU, Include both (ie. no filter) = All Inventory Records

**IsCurrentCalendarYear**
This is a flag that can be used as a filter to only display inventory records that have been created within the same calendar year as the latest PU (Update Date).
1 = Record was created within the same year as the latest PU, 0 = Record was NOT created within the same year as the latest PU, Include both (ie. no filter) = All Inventory Records

**IsCurrentFinancialYear**
This is a flag that can be used as a filter to only display inventory records that have been created within the same financial year as the latest PU (Update Date).
1 = Record was created within the same financial year as the latest PU, 0 = Record was NOT created within the same financial year as the latest PU, Include both (ie. no filter) = All Inventory Records

**Stated Corporate Currency Stock Value**
Calculates the Stated Current Stock Value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Stock Value by the Corporate Currency Rate.

**System Corporate Available Stock Value**
Calculates the Available Stock Value by multiplying available stock by the average unit price, and represents it in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Stock Value by the Corporate Currency Rate.

**System Corporate Surplus Value**
Calculates the Surplus Stock Value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Surplus Stock Value by the Corporate Currency Rate.

**Max Holding Value**
The value of the maximum holding level of stock, expressed in the Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Surplus Stock Value by the Corporate Currency Rate.

**Minimum Holding Value**
The value of the minimum holding level of stock (ROP), expressed in the Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Surplus Stock Value by the Corporate Currency Rate.
**Aged Date**
Determination of which record to utilize in establishing the age of the stock. Possible date values include Last Issue Date, Last Receipt Date or Creation Date of the record itself.

**Previous Listed Unit Price**
The value of the listed price of the item before its current Listed Price during the previous month.

**Last Month Current Max**
The maximum stock level of the item during the previous month.

**Is Earliest Month In Year**
This is a flag that can be used as a filter to only display inventory records that apply to either of the following rules:
- The latest PU was in January and the earliest available month is from the previous year or
- The latest PU was not in January and the earliest available month from the current year
1 = Record adheres to one of the aforementioned rules, 0 = Record adheres to neither rule.
Snapshot_Issue_History

TABLES INCLUDED
Issues History (includes both Issues and Returns)
Item (Material) details for current month

DATA SOURCE OBJECTIVE
You could use this data source to:
- Compare Issues to Returns over time
- Analyse Returns in depth and segment by Site (Plant), Control Segment and more
- Review Work Orders that relate to Issues and/or Returns
- Review Items (Materials) that relate to Issues and/or Returns

CALCULATIONS IN DATA SOURCE

Issue Value
(Issue Size x Issue Price) as an absolute calculation, to report both Returns (where Issue Size is < zero) and Issues as a positive figure in Reports eg, Executive Dashboard
If the Corporate Currency Rate greater than zero, then multiply the absolute calculation above by the Corporate Currency Rate

IssueValueNet
Calculation of issue values (Issue Size x Issue Price) with Returns having a negative issue value. If the Corporate Currency Rate greater than zero, then multiply the calculation above by the Corporate Currency Rate.

IsIssueThisYear
This is a flag that can be used as a filter to only display Issues/Returns that have been created from 1 year ago from the latest PU (Update Date).
1 = Issued/Returned This Year, 0 = Not Issued/Returned This Year, Include both (ie. no filter) = All Issues/Returns

IsIssueLastYear
This is a flag that can be used as a filter to only display Issues/Returns that have been created between 1-2 years ago from the latest PU (Update Date).
1 = Issued/Returned Last Year, 0 = Not Issued/Returned Last Year, Include both (ie. no filter) = All Issues/Returns

IsIssueOverdue
This is a flag that can be used as a filter to only display Issues/Returns where the Due Date is less than the Issue Date.
1 = Issue is Overdue, 0 = Issue is NOT Overdue, Include both (ie. no filter) = All Issues/Returns

IsWOTThisYear
This is a flag that can be used as a filter to only display records where the Work Order is within 1 year from the latest PU (Update Date)
1 = Work Order is in the Last Year, 0 = Work Order is NOT in the Last Year, Include both (ie. no filter) = All Records
**IsIssueDueDateThisYear**
This is a flag that can be used as a filter to only display records where Issues/Returns became due within 1 year from the latest PU (Update Date)
1 = Issue/Return became due in the Last Year, 0 = Issue/Return did NOT become due in the Last Year, Include both (ie. no filter) = All Records

**IssueType**
Determine if the record is an Issue or a Return. If the Issue Size is less than zero then this signifies a Return, all other records are Issues.

**DaysOverdue**
Calculates the number of days where the Issue Date is past the Due Date.

**StockoutCost**
Calculates the Current Stockout Cost in Corporate Currency.
If the Corporate Currency Rate greater than zero, then multiply the Current Stockout Cost by the Corporate Currency Rate

**IssuePriceCorporate**
Calculates the Issue Price in Corporate Currency, in the case where a user may want to see the Corporate Issue Price separate to the Issue Value.
If the Corporate Currency Rate greater than zero, then multiply the Issue Price by the Corporate Currency Rate

**NumberOverdueIssues**
If an Issue/Return is overdue then count the record.
Snapshot_Item_Equipment_Details

TABLES INCLUDED
Item (Material) details for current month
Current Equipment details
Issues History
Bill of Material Details

DATA SOURCE OBJECTIVE
You could use this data source to:
• List the Equipment that relates to an Item (Material) either via Bill of Materials (BOMs) or Issues
• List the equipment and filter where Item is issued to Equipment
• Review items where all Equipment is Inactive

CALCULATIONS
Corporate Currency Stock Value
Calculation of the current stock value represented in the Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Surplus Stock Value by the Corporate Currency Rate.

Is Issued To Equipment
This is a boolean value that can be used as a filter to only display inventory items that have been issued to pieces of equipment.
True = Item has been issued to equipment, False = Item has not yet been issued to equipment

Filter Non Active Stock Codes (Tableau calculation)
This is a boolean value that is used to display inventory items where the equipment is not active ie. where the active flag is N.
1 = Item has active Equipment, 0 = Item does not have active Equipment

Filter where BOM doesn't exist (Tableau calculation)
This is a boolean value that is used to display inventory items that do not exist on a Bill of Materials (BOM) ie. where the BOM No. is null for an inventory item.
True = Item does not exist on a BOM, False = Item exists on a BOM

Last Issue or Receipt Date (Tableau calculation)
Calculates the latest (max) date where the inventory item was issued or receipted.
If the Issue Date does not exist, then use the Receipt Date.
If the Receipt Date does not exist, then use the Issue Date.
If both Issue and Receipt Date exist, use the maximum of the two dates.

Show Items where not Issued for 2 Years? (Tableau calculation)
This is a boolean value that can be used as a filter to only display inventory items that have not been issued/receipted for over 2 years.
Yes = Item not issued/receipted for over 2 years, No = Item has been issued/receipted in the last 2 years, All = Show All items regardless of when last issued/receipted.
Show where Active Flag is only N? (Tableau calculation)
This is a boolean value that can be used to display inventory items where all the equipment for that inventory item is not active, i.e., active flag is N.
1 = All equipment is not active for an inventory item, 0 = All equipment is active for an inventory item, All = display all items regardless of whether equipment is active or non-active.

SOH Value per Stock Code? (Tableau calculation)
Calculates the inventory value per inventory item to remove duplicates that may exist in the data records.
Snapshot_Receipt_History

TABLES INCLUDED
Receipts
Item (Material) details for current month
Supplier

DATA SOURCE OBJECTIVE
You could use this data source to:
• Report on Receipts Values over time
• Analyze Supplier Lead Times
• Review Purchase Order information relating to Quantities ordered and received

CALCULATIONS
Corporate Receipt Value
Calculation of the value of receipts, represented in the Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Surplus Stock Value by the Corporate Currency Rate.

Corporate Current Price
Calculation of the current item price, represented in the Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Surplus Stock Value by the Corporate Currency Rate.

Is Receipt in Last Year
This is a flag that can be used as a filter to only display inventory records that have been created within the year before the latest PU (Update Date).
1 = Record was from within the year before the latest PU, 0 = Record is NOT from within the year before the latest PU, Include both (ie. no filter) = All Inventory Records
**Table: Snapshot Review History**

**Tables Included**
- Export History
- Item (Material) History

**Data Source Objective**
You could use this data source to:
- View items that have beenReviewed and Exported over time
- Monitor the user acceptance of system recommendations using Optimal Optimal Best (OOB) status
- View details of Exports including Export Type and by User

**Calculations**

**Last Export Reorder Point**
The Reorder Point of the item during the second most recent PU.

**Last Export Reorder Quantity**
The Reorder Quantity of the item during the second most recent PU.

**Last Recorded Reorder Point**
The Reorder Point of the item during the most recent PU.

**Last Recorded Reorder Quantity**
The Reorder Quantity of the item during the most recent PU.

**Is Exported This Year**
This is a flag that can be used as a filter to only display items that have been exported within the year of the latest PU.
- 1 = Item was exported within the year of the latest PU
- 0 = Item was NOT exported within the year of the latest PU, Include both (ie. no filter) = All Records

**Is Exported This Month**
This is a flag that can be used as a filter to only display items that have been exported the same month as the latest PU (Update Date).
- 1 = Record was exported the same month as the latest PU
- 0 = Record was NOT exported the same month as the latest PU, Include both (ie. no filter) = All Records

**Is Exported Last Year**
This is a flag that can be used as a filter to only display items that have been exported the year before the latest PU (Update Date).
- 1 = Record was exported the year before the latest PU
- 0 = Record was NOT exported the year before the latest PU, Include both (ie. no filter) = All Records

**Is Reviewed This Year**
This is a flag that can be used as a filter to only display items that have been reviewed within the year of the latest PU (Update Date).
1 = Item was reviewed within the year of the latest PU, 0 = Item was NOT reviewed within the year of the latest PU, Include both (ie. no filter) = All Review Records

**Is Reviewed This Month**
This is a flag that can be used as a filter to only display items that have been reviewed within the month of the latest PU (Update Date).
1 = Item was reviewed within the month of the latest PU, 0 = Item was NOT reviewed within the month of the latest PU, Include both (ie. no filter) = All Review Records

**Is Current Month**
This is a flag that can be used as a filter to only display items that have been reviewed within the month of the latest PU (Update Date).
1 = Item was reviewed within the month of the latest PU, 0 = Item was NOT reviewed within the month of the latest PU, Include both (ie. no filter) = All Review Records

**Is Current Month, Last Year**
This is a flag that can be used as a filter to only display snapshots from the same month, but the previous year, of the latest PU (Update Date).
1 = snapshot is from the same month but previous year of the latest PU, 0 = snapshot is NOT from the same month but previous year of the latest PU, Include both (ie. no filter) = All Records

**Is Current Year**
This is a flag that can be used as a filter to only display snapshots from less than a year before the latest PU (Update Date).
1 = snapshot is from less than a year before the latest PU, 0 = snapshot is NOT from less than a year before the latest PU, Include both (ie. no filter) = All Records

**OOB (Optimal Optimal Best)**
Field value is based on calculations used for determining Reorder Point, Reorder Quantity and Forecasts. Possible values are “OOB” and “Not OOB”.

**Corporate Currency Stock Value**
Calculates the Current Stock Value in Corporate Currency. If the Corporate Currency Rate is greater than zero, then multiply the Current Stock Value by the Corporate Currency Rate.
**Snapshot_Turnover**

**TABLES INCLUDED**
- Issues History
- Item (Material) History

**DATA SOURCE OBJECTIVE**
This data source is specifically written for the purpose of reporting on Turnover.
You could use this data source to:
- View Turnover as a trend over time
- View Turnover by Site (Plant)
- Exclude Special items from the Turnover calculation

**CALCULATIONS**

**Stock Value Including Special**
Calculation of total stock values month-over-month (current values during each snapshot) over the past year.

**Stock Value Excluding Special**
Calculation of total stock values month-over-month (current values during each snapshot) over the past year excluding inventory with a Control Segment value of “Special”.

**Issue Value Excluding Intended Non-Stock, Including Special**
Calculation of total issues sizes multiplied by their respective issue prices, given the precondition that items issued have neither a Reorder Point of ‘0’ nor a Reorder Quantity of ‘0’.

**Issue Value Excluding Intended Non-Stock, Excluding Special**
Calculation of total issues sizes multiplied by their respective issue prices, given the precondition that items issued have neither a Reorder Point of ‘0’, a Reorder Quantity of ‘0’ nor are they flagged as “Special”.

**Max Stock On Hand**
The maximum level of Stock On Hand over the past 12 months.

**Max Reorder Point**
The highest reorder point over the past 12 months.

**Max Reorder Quantity**
The largest reorder quantity over the past 12 months.

**Special**
This is a flag that can be used as a filter to only display items that have Benchmark Control Segment value of ‘SPECIAL’.
1 = Item has a Benchmark Control Segment Value of ‘SPECIAL’, 0 = Item does NOT have a Benchmark Control Segment Value of ‘SPECIAL’, Include both (ie. no filter) = All Records
Snapshot_Work_Order_History

**TABLES INCLUDED**
Work Order (Events) History
Issues History
Item (Material) History
Group Class Reference/Description

**DATA SOURCE OBJECTIVE**
You could use this data source to:
- Analyse Reviews that relate to Work Orders
- Review Work Orders in detail
- Analyse Work Order Returns by Work Order Date, Employee who performed the Return, Commodity and Item (Material)
- Review the associated Items (Materials) with a Work Order

**CALCULATIONS**

**Issue Value**
Calculation of the absolute value by multiplying the issue size by the issue price, irrespective of whether or not it was an issue or a return.

**Issue Type**
Designation of the type of issue, whether it is an ‘issue’ or a ‘return’. If the issue size is greater than ‘0’, then it is in fact an ‘Issue’. Otherwise, it is a ‘Return’.

**Issue Price**
Calculation of the issue price in the corporate currency. If the Corporate Currency Rate is greater than zero, then multiply the Issue Price by the Corporate Currency Rate.

**Is Work Order From Last 2 Years**
This is a flag that can be used as a filter to only display work orders that were created within the two years (24 months) before the latest PU (Update Date).
1 = Record was from within 2 years before the latest PU, 0 = Record is NOT from within 2 years before the latest PU, Include both (ie. no filter) = All Inventory Records
Equipment via BOM Template

DATA SOURCE USED
Equipment BOM Details

REPORT OBJECTIVE
This report is a template that will allow the user to access Stock Items relating to Equipment, via Bill of Materials (BOMs).

HOW TO INTERPRET EACH CHART
Equipment Details
This chart displays the count of stock codes per Site/Plant and Equipment number and is to be used as a guide only.
Equipment via Issues Template

DATA SOURCE USED
Equipment Issue Details

REPORT OBJECTIVE
This report is a template that will allow the user to access Stock Items relating to Equipment, via Issues.

HOW TO INTERPRET EACH CHART
Equipment Details
This chart displays the count of stock codes per Site/Plant and Equipment number and is to be used as a guide only.
REPORT OBJECTIVE
This report is a template that will allow the user to access Export details as an export occurs. The report is limited to Exports that have occurred in the past 2 years.

HOW TO INTERPRET EACH CHART
Export Details
View the number of items that have been exported per month where the user has accepted the recommendations made by IBM Maximo MRO Inventory Optimization (where = OOB) vs non-acceptance (Not OOB).
This is to be used as a guide only.
Inventory Details Template

DATA SOURCE USED
Inventory Details

REPORT OBJECTIVE
This report is a template that will allow the user to access Stock Item details for the current month.

HOW TO INTERPRET EACH CHART
Inventory Details
This chart displays the Inventory Value for each Criticality Code and is to be used as a guide only.
Inventory Details (All Fields) Template

DATA SOURCE USED
Inventory Details (All Fields)

REPORT OBJECTIVE
This report is a template that will allow the user to access Stock Item details for the current month and includes ALL fields from the Item table.

HOW TO INTERPRET EACH CHART
Inventory Details
This chart displays the Inventory Value for each Site/Plant and is to be used as a guide only.
Inventory History Template

DATA SOURCE USED
Inventory History

REPORT OBJECTIVE
This report is a template that will allow the user to access Stock Item history for reporting on trends over time.

HOW TO INTERPRET EACH CHART
Inventory History
This chart displays the Inventory Value for the last 12 months and is to be used as a guide only.
Issues History Template

DATA SOURCE USED
Issues History

REPORT OBJECTIVE
This report is a template that will allow the user to access Issues history for reporting on trends over time.

HOW TO INTERPRET EACH CHART
Issues History
This chart displays the Issue Value for the last 12 months and is to be used as a guide only.
Movements History Template

DATA SOURCE USED
Issues History
Receipts History

REPORT OBJECTIVE
This report is a template that will allow the user to view Issues and Receipts history in the one chart.

HOW TO INTERPRET EACH CHART
Issues and Receipts in the Last Year
This chart displays the Issue Value and Receipts Value for the last 12 months and is to be used as a guide only.
This chart has been achieved by "data blending" two data sources.

DATA BLENDING
You are able to "blend" two data sources together by creating a relationship between fields present in both data sources within Tableau.

*Note: caution should be adhered to when blending data sources as this can sometimes lead to less than ideal report performance
Supplier Performance Template

**DATA SOURCE USED**
Receipts History

**REPORT OBJECTIVE**
This report is a template that will allow the user to view the Receipts relating to a Supplier.

**HOW TO INTERPRET EACH CHART**

**Top 20 Receipts in the Last Year**
This chart displays the Top 20 Suppliers based on total Receipt Value for the last 12 months and is to be used as a guide only.
Receipts History Template

DATA SOURCE USED
Receipts History

REPORT OBJECTIVE
This report is a template that will allow the user to access Receipts history for reporting on trends over time.

HOW TO INTERPRET EACH CHART
Receipts History
This chart displays the Receipt Value for the last 12 months and is to be used as a guide only.
Item to Equipment Template

DATA SOURCE USED
Item to Equipment Details

REPORT OBJECTIVE
This report is a template that will allow the user to view Equipment that has been issued to an Item via an Issue or Bill of Materials (BOM).

HOW TO INTERPRET EACH CHART
Item to Equipment Template
This is a list report that outlines the Stock Item/Material, BOM No, Total Stock Value and Equipment Number and is to be used as a guide only.

You are able to filter the data where ALL stock items/materials are not active on a BOM, view where a stock item/material is only linked via an issue (where BOM doesn’t exist) and also view stock items/materials where there is no equipment associated.
Accepted System Recommendations

**DATA SOURCE USED**
Review History

**DATA REQUIRED**
All Review and Export data since beginning of time.

**REPORT OBJECTIVE**
An indicator of the rate of acceptance of system recommendations - defined by records exported with IBM Maximo MRO Inventory Optimization's 'optimal optimal best' (OOB) recommendation, relative to the exported total.
The visualization is categorized by site (or plant) and filtered by month.
The 2nd visualization is categorized by User.

**HOW TO INTERPRET EACH CHART**

**BY SITE/PLANT**

% of Items Export (Since Beginning)
% of the total Items that have been Exported since the beginning of system usage.

% of Items Export (Current Month)
% of the total Items that have been Exported for the current month

**Items Exported**
A comparison of the number of items exported this month vs the total number of items currently held.

**Items Exported This Year**
The total number of items exported by month for the last 12 months. This number is split by "Optimal, Optimal, Best" or "OOB". If the item is set to OOB, this indicates that the user has accepted the system recommendation.
There is also a trend by Site (Plant) of the number of exports for each month over the last 12 months.

**Export Details**
A detailed listing of the Items (Materials) that have been exported, including who performed the export, whether the export was Automatic or Manual, and the Inventory Savings associated with the Export.
You can also filter this chart to show distinct exports per month for a material/stock item, ie. only the maximum export will be included per item per month.

**BY USER**

**Exported This Year**
The total number of items exported by month for the last 12 months, split by User.

**Exported Current Month**
The total number of items exported for the current month, split by User.

**Export Trend (Current Month)**
Exports by Day for the Current Month, sized by Inventory Savings. Use this chart to highlight high periods of export activity.
You can also filter this chart to show distinct exports per month for a material/stock item, ie. only the maximum export will be included per item per month.
Audit Log

DATA SOURCE USED
Audit Log History

DATA REQUIRED
Audit Data to be turned on

REPORT OBJECTIVE
List all of the Audit entries made by a User, with ability to filter by Audit Type, Table Name, User, and Date.

HOW TO INTERPRET EACH CHART
Audit Status
Provides a list Audit entries in Audit Date Order to review the workflow for each User
- Filter the report to view by Audit Type, Table Name, User and/or Date
Criticality Breakdown

DATA SOURCE USED
Inventory History
Inventory Details

DATA REQUIRED
This report requires Item (Material) History data.

REPORT OBJECTIVE
This report allows the user to compare sites (or plants) of the distribution of inventory records falling into each Criticality Segment from A to E.

HOW TO INTERPRET EACH CHART

Criticality Breakdown
This chart displays the distribution of the # of items as a % for each Criticality Code for each Site (or Plant).
Users can use this breakdown to determine if the Criticality % spread across Inventory is in line with recommended percentages.

Criticality Changes
This chart provides a comparison between current month and last month of the total number of items in each Criticality Code.
This chart can be used to monitor changes in the number of items between months.
- Select a Division or Site (Plant) in Criticality Breakdown to see the Criticality Changes for the selected Division or Site (Plant)
- Select a Control Segment from the CS filter to see the Breakdown and Changes for the selected CS
Executive Dashboard

DATA SOURCE USED
Inventory Details
Inventory History
Issue History
Receipt History

DATA REQUIRED
Item (Material) data for the last 12 months
New Item Data for the last 12 months
Issues and Returns data for the last 12 months
Receipts data for the last 12 months

REPORT OBJECTIVE
A management overview of Inventory, including Inventory value by month, current breakdown of inventory by Control Segment, Newly added items to Inventory, Issues & Returns and Aged Stock.

HOW TO INTERPRET EACH CHART

Inventory Balances
Total Inventory Value over the past 12 months rolling.

Item Count by Criticality
Number of items (materials) for each site (plant) by Criticality Code.

Inventory Reductions
Displays the distribution of Inventory Value movement between the start of the year to current month for each Site (Plant).

Approved Additions to Inventory
Inventory Value of Items that have been added in the past 12 months, grouped by Control Segment.

Inventory Breakdown by Control Segment
Inventory Value by Control Segment, as at current update month.

Aged Stock
The last time an Item (Material) was Issued or Receipted or if there is no Issue or Receipt, then when the Item (Material) was created, grouped into Aged Date Categories of 0-1 year, 1-2 year, >2 year. Management can gain an overview of potentially obsolete or Inactive Items.

Receipts
An overview of Receipts Value by Month for the past 12 months.

Inventory Movements
This chart displays the Issues and Returns values for the past 12 months.
**Inactive Items**

**DATA SOURCE USED**
Inventory Details

**DATA REQUIRED**
This report requires Item (Material) data that has an associated Issue Date.

**REPORT OBJECTIVE**
A count of non moving inventory records, divided by those which haven’t been issued for greater than 2, 3, 4 or 5 years, by site (or plant).
This report indicates the scale of records falling into obsolescence, as well as the annual rate.

**HOW TO INTERPRET EACH CHART**
**Inactive Items**
This chart displays the total Inventory Value of items that haven't been issued for more than 1 to 5 years for each site (or plant).
It allows the user to focus on potentially obsolete items.

**Aged Stock Profile**
Highlights outliers where an item hasn't moved (issued or receipted) for a considerable length of time, where the Stock Value is high.
Items are colored by Criticality and contextual detail is given at each stock item point, including:
- Control Segment
- Stock on Hand
- Months of Stock Available
- Lead Time in Months

You can filter this report by Control Segment to focus on particular groups of items that may be of concern.
Inventory Stockout

DATA SOURCE USED
Issue History

DATA REQUIRED
This report requires Item (Material) data that has been Issued.

REPORT OBJECTIVE
Average Stockout Duration for overdue Issues (in days) by site (or plant) for the last 12 months, also highlighting the number of overdue issues in the last 12 months.

HOW TO INTERPRET EACH CHART

Average Stockout Duration
This chart displays the average number of days an Item Issue is past the Issue Due Date for each Division, Site (Plant) and Store and the actual number of Overdue Issues. It can be used to focus on the locations where items were out of Stock, potentially impacting production.

Top 20 Overdue Issues by Count
A list of the Top 20 Items based on the Number of Overdue Issues and coloured by Average Stockout Cost. Focus on items where the Stockout Cost is high, demonstrating a possible impact to Production.

Top 20 Overdue Issues by Duration
A list of the Top 20 Items based on the Number of Days that Issues are overdue and coloured by Average Stockout Cost. Focus on items where the Stockout Cost is high, demonstrating a possible impact to Production.
Item Results

DATA SOURCE USED
Inventory Details

DATA REQUIRED
This report requires Item (Material) data.

REPORT OBJECTIVE
A comparison of the item Host System’s current reorder level settings, ROP/ROQ (Min/Max) and the recommended reorder settings by IBM Maximo MRO Inventory Optimization policies. These results affect the expected savings (or additional investment) related to the inventory forecasting and optimization process.

HOW TO INTERPRET EACH CHART

Stock Values
This chart displays the Number of Items, Inventory Value and the Average Stock Value Reduction (Current Average Stock Value minus Recommended Average Stock Value) for the following categories:

- Decrease: where the Recommended Average Stock Value is less than the Current Average Stock Value
- Increase: where the Recommended Average Stock Value is greater than the Current Average Stock Value
- Unchanged: where the Recommended Average Stock Value is equal to the Current Average Stock Value
- No Data: where an item does not fall in one of the above categories i.e. either Recommended Average Stock Value and/or Current Average Stock Value is not populated

Costs
Current minus Recommended Costs for:

- PO Costs
- Holding Costs
- Stockout Costs
- Total Costs

Service Level
Current Service Level % for each Criticality Code for the current month represented as BAR. Recommended Service Level % for each Criticality Code for the current month represented as BAR.

Allows the user to focus where the Service Level is below the Recommendation.
Potential Write Offs

**DATA SOURCE USED**

Item to Equipment Details

**REQUIRED**

This report requires Item (Material), Issues, BOM and Equipment data.

**OBJECTIVE**

This report allows the user to:

- Review inventory items that could potentially be written off. This is where the item:
  - has been issued to equipment via the Issues table where no bom exists (bom is null) and all equipment is not active ie. active flag is N OR
  - has been issued to equipment via the BOM table where a bom exists and all equipment is not active on ALL boms ie. active flag is N

The report will list all stock items where the above conditions exist, with associated stock item values. Users are able to focus on a particular plant/s by selecting from the Plant drop down filter. The report can further be filter to show equipment via Issues only (Show Items where BOM doesn’t exist? filter) and also where an item hasn’t been issued for at least 2 years.

**HOW TO INTERPRET EACH CHART**

- **No. of Items**
  Displays the total number of stock items that could potentially be written off.

- **Inventory Value**
  Displays the total stock value of stock items that could potentially be written off.

- **Inventory Value by Plant**
  Displays the total stock value of stock items that could potentially be written off by Plant in descending order.

- **Potential Items for Write Off**
  Lists the stock items and associated details, including last issued or receipted date, available for potential write off.
Returns Analysis

DATA SOURCE USED
Work Order History

DATA REQUIRED
This report requires data relating to Work Orders in the SET_EVENT table when the Maintenance module is enabled.

REPORT OBJECTIVE
This report allows the user to focus and pinpoint the cause of high Returns vs Issues and is driven from a Work Order point of view.

HOW TO INTERPRET EACH CHART

Returns Overview
This chart is a high level view of each Work Order (point on the chart) that highlights outliers where the Issue and/or Return Value is above a certain threshold.
- Select one or many Work Orders (points) in the chart to view the consolidated totals for Issues and Returns.
- Add thresholds for Issue and/or Return Value to highlight outliers where Issue or Return Value is high.

Returns by Work Order Date
This chart highlights the Work Order Date where there was a high value of Returns over the past 2 years. Users can detect trends where Returns are completed within a particular week or weekday.
- Select a Work Order Date to see the Work Order Details relating to that date.

Returns by Employee
This chart allows you to focus on the employee/s that are completing high Return values.
- Select an employee to see the Work Order Details relating to that employee.

Returns by Commodity
Returns Values are sized in descending order by Commodity (Group Class) and then by Control Segment within a Commodity. A user can determine the Commodity group that has the highest Return Value.
- Select a Commodity/Control Segment to see the Work Order Details relating to that Commodity/Control Segment.

Returns by Item (Material)
Use this chart to see the Items (Materials) relating to a Commodity with a high Return Value. This could lead to overstocking of a particular Item (Material).
- Select a Commodity from the donut chart, then view the related Items (Materials) in the word cloud.
- Items (Materials) are sized in the work cloud by Return Value.
- Select an Item (Material) from the work cloud to see the Work Order details relating to that Item (Material).
Returns Overview

DATA SOURCE USED
Review History

DATA REQUIRED
This report requires Issue History data.

REPORT OBJECTIVE
This report allows the user to:

- Review the Returns Value by Site, Control Segment, Work Orders and Items (Materials) for the past 12 months.
- Compare Returned vs Issued Values by month for last 12 months. Excludes issues not considered to be 'usage,' such as transfers.

HOW TO INTERPRET EACH CHART

Returns by Site
This chart assists in identifying which sites are processing the highest Returns by Value.

Returns by Control Segment
This chart assists in identifying the Control Segments that have the highest Returns by Value.

Top 20 Work Orders by Return Value
Determine the Work Orders that have the highest Returns by Value.

Top 20 Stock Items by Return Value
Determine the Stock Items that have the Highest Returns by Value.

Issues vs Returns
Compare Issues to Returns per month to highlight where Returns are greater than Issues. This could provide further analysis to find possible overstocking issues.
Reviews and Exports

DATA SOURCE USED
Review History

DATA REQUIRED
This report requires Inventory History and Export data.

REPORT OBJECTIVE
This report allows the user to compare the no. of reviews and exports over the last 12 months, by month. Reviews and exports are also categorised by 'optimal optimal best' (OOB) and Not OOB.

HOW TO INTERPRET EACH CHART
Review and Exports
View the number of items that have been Reviewed and/or Exported where the user has accepted the recommendations made by IBM Maximo MRO Inventory Optimization (where = OOB) vs non-acceptance (Not OOB). This will give an indication of how well users are adopting the IBM Maximo MRO Inventory Optimization system as well as the trend of workload over the last 12 months. Filters for Division, Site (Plant), Control Segment and Status can be applied for further analysis.
Stock Movement

DATA SOURCE USED
Inventory History
Inventory Bridge

DATA REQUIRED
This report requires Item (Material) History data.

REPORT OBJECTIVE
This report allows the user to:

- Review inventory value over time by stock on hand or available stock
- Identify surplus and under stocked inventory by reviewing Current Stock Value by Month for last 12 months, in contrast to Min and Max values
- Establish the cause of Increases and Decreases of inventory value since 1 year ago due to newly added items, price changes, optimising inventory value, reducing excess stock and (below min variances)

HOW TO INTERPRET EACH CHART

Baseline
This chart displays the Inventory Value using either Stock on Hand or Available Stock as well as New Inventory Value for each month to review the Inventory Value Change from the Baseline date (beginning date of the period chosen).
- Select a date period to change the Baseline date to view Inventory Values, New Inventory Value and the Inventory Value Change for that period
- View values using either Stock on Hand or Available Stock

Inventory Valuation
This chart is an overview of the Inventory Value for the last 12 Months rolling, also displaying Min and Max values to determine possible Surplus issues.

Inventory Bridge
Inventory Value is categorized to determine where Increases and Decreases have occurred over the 12 months rolling.
Surplus Analysis

DATA SOURCE USED
Inventory History

DATA REQUIRED
Historical Item data

REPORT OBJECTIVE
Highlight potential outliers where the Surplus Amount is high, caused by change in Max or over ordering stock.

HOW TO INTERPRET EACH CHART

Expected Surplus Caused by Change in Max
This chart lists the items by Surplus Amount, where the max value has changed from last month to this month.
This type of surplus is expected due to this change and needs to be run down.

Potential Surplus Caused by Over Order
This chart lists the items by Surplus Amount for the current month, where the Stock on Hand PLUS the Quantity On Order is greater than the current Max (where Quantity on Order is greater than zero)

Item Details
Lists the items with various contextual detail, including:
- Control Segment
- Stock on Hand
- Quantity On Order
- Last Month Max
- Current Month Max
Select an item in Expected Surplus or Potential Surplus to filter the Item Details table.
System Usage History

DATA SOURCE USED
System Usage History
Review History

DATA REQUIRED
Exported Data
User to have spent time within the system

REPORT OBJECTIVE
Review the time a User has spent in system and the associated Inventory Savings

HOW TO INTERPRET EACH CHART

Time Spent by User (Minutes)
Review the time spent in OAS for the selected User and Year. Provides a trend over the Year to monitor usage.

Exported Inventory Savings
Review the Inventory Savings achieved vs the time spent in the system for the selected User and Year. Provides a trend over the Year to monitor usage and can be split by OOB/Not OOB.

Time Spent by Week (Minutes)
Review the time spent in the system for the selected User and Year. Review trends of most production days and/or weeks of any given month with the selected Year

Time Spent Details (Minutes)
Provides a break down of the workflow in the system for the selected User and Year.

REPORT FUNCTIONALITY

- Select a month in Time Spent by User to view the month in all other charts
- Select a day/week in Time Spent by Week to see the Details (Time Spent Details) for the selection
Turnover

DATA SOURCE USED
Turnover

DATA REQUIRED
This report requires Item (Material) and Issues data for the past 12 months.

REPORT OBJECTIVE
A ratio showing how many times inventory is sold and replaced over a period of time for both including and excluding special items over the last 12 months.

HOW TO INTERPRET EACH CHART
Turnover excluding items marked as "SPECIAL" are represented by the BAR. Turnover including items marked as "SPECIAL" are represented by the LINE.

Special items are defined where the Benchmark Control Segment = "SPECIAL".
Varying Unit Prices

DATA SOURCE USED
Inventory History

DATA REQUIRED
This report requires Item (Material) History data.

REPORT OBJECTIVE
This report allows the user to determine outliers where the Unit Price of an item has changed significantly from last month to current month. It also allows the user to view the pricing history and whether an item has steadily increased in price and whether the Supplier of that item is a preferred Supplier.

HOW TO INTERPRET EACH CHART

Unit Price Increase or Decrease (Last Month to Current Month)
This chart calculates the % increase or decrease in Unit price for a stock code from last month to current month (Update Date) and can be used to determine outliers where the % difference is significant.

Unit Price over Time
When a stock code or point is selected from the chart above (Unit Price Increase or Decrease), this chart will show the Unit Price change over time, including the Supplier Code and whether they are a preferred supplier.
Workqueues

DATA SOURCE USED
Workqueue History

DATA REQUIRED
Current Workqueue data

REPORT OBJECTIVE
A prioritised list of items to be reviewed, displaying the total number of items in the queue, the number reviewed this month and the remaining percentage.

HOW TO INTERPRET EACH CHART

Workqueue Status
Provides a list in Priority Order of each workqueue and the outstanding review % remaining.

- Filter the report to only view the reviews for this month only
- Filter the report to select the Group/s or Set/s you would like to focus on
Create a Custom Report
You can create a new custom report by clicking Create on the upper right.

All new user-created reports are based on templates of preexisting standard and custom reports. Click one of the Categories on the left to narrow down the selection.

Select the template that you want to customize and click Next.

Enter a new name for the report and specify a category to save it in. You can save the report in any of the existing categories or create a new one. You can also add a description for the report, but this is optional.

Click Create to save the new custom report.

Change the Workbook Properties at any time by clicking Edit on the custom report.

You can also click Copy on any standard or custom report to automatically create a new version of a report.
Edit Custom Reports

After opening a custom report, click Edit on the upper right of the window. This will allow you to edit the workbook the data visualization is based on.

Overview of the Web Editor Workspace

The web editor offers a full suite of data visualization tools that allow you to extensively modify existing reports, as well as create new worksheets and dashboards from scratch.

Data fields used in the visualization are displayed as data pills in the Cards or Shelves areas. Blue pills represent discrete values, while green pills are for continuous values.

To get started, you can drag and drop data fields from the Data Pane on the left side bar to either the Cards or Shelves areas to create new visualizations.

Click Show Me and select one of the available options to automatically create new views based on the data fields already in place.

A. Toolbar – Provides access to workbook commands and formatting options.
B. Data Pane – Displays all connected data sources and all data fields that are available from the currently selected data source.
C. Sheet tabs – Click to switch between different worksheets and dashboards contained in the workbook.
D. Cards and Shelves – Drag data fields here to change the appearance of data marks, place and modify filters, or separate a report into different pages.
E. Columns and Rows Shelves – Use these shelves to specify which data fields will be used for the X and Y-axis of the table.
F. Show Me – Click to show different automatically generated visualization options.
Edit Worksheets in Dashboards
Dashboards are made up of several worksheets combined into a single view.

On the left side bar, click next to a worksheet to open it in the web editor.

Worksheet tabs in a dashboard may be hidden from view.

To make a hidden worksheet tab visible, right-click the worksheet's name then click Hide Sheet to remove the check mark next to it.

You can also right-click the dashboard tab and click Unhide All Sheets.

You should now be able to see a tab for every worksheet in the workbook. This can be useful if you want to reuse the existing worksheets for a new dashboard.

Click on a worksheet tab to select it, then right-click to reveal more options.

If you want to make a worksheet accessible via a link whenever the report is viewed, click Publish Sheet and a check mark should appear.
Overview of the Data Pane

The Data pane on the left side bar shows all the available data fields in a data source. If more than one data source has been added to a workbook, a list of data sources will be displayed on top of the Data pane. Every data field in a data source is automatically assigned to either the Dimensions or Measures area depending on the type of data it contains.

Dimensions
Categorical data like criticality, division, district code and dates are grouped into the Dimensions area. When a dimension is used in visualization, it is initially treated as a discrete value and shows up as a blue data pill.

Measures
Quantitative or numerical data like ROP, ROQ, price, issue value, stock value and days overdue, which can be aggregated or measured, are grouped into the Measures area. When a measure is used in a visualization, it is initially treated as a continuous value and shows up as a green data pill.

Data Types

Icons next to the field name indicate what type of data the field contains.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📝</td>
<td>Text values</td>
</tr>
<tr>
<td>🕒</td>
<td>Date and time values</td>
</tr>
<tr>
<td>🔢</td>
<td>Numerical values</td>
</tr>
<tr>
<td>☑</td>
<td>Boolean values</td>
</tr>
<tr>
<td>🌍</td>
<td>Geographical values</td>
</tr>
</tbody>
</table>

Adding a new Data Source

To add a new data source, click on the toolbar. Choose the data source you want to add then click Add.
Columns and Rows Shelves
You can specify which data uses the horizontal and vertical axes of your table by placing any number of data fields onto either the Columns or Rows shelves.

Click on the toolbar to quickly swap the data fields from the Columns shelf to the Rows shelf and vice versa.

Click on the arrow at the end of any data field and a drop-down menu should appear. You can also right-click the data field to display the same options.

The available options will vary depending on the type of data contained in the field.

Typical data field options include:

- **Show Filter/Show Highlighter**
  Adds a filter or highlighter option to the visualization using the values in the selected data field.

- **Show Header**
  Click to add or remove headers from the visualization.

- **Discrete/Continuous**
  Select to convert a discrete value into a continuous value and vice versa.

- **Dimension/Attribute/Measure**
  Select whether to treat a data field as a Dimension or Measure, or define it as an Attribute. Use the Measure sub menu to change how a field is aggregated.

- **Edit in Shelf**
  Allows you to edit a calculated field directly from the shelf.

- **Add Table Calculation/Quick Table Calculation**
  Lets you create a new table calculation or select from a list of standard calculations.

- **Remove**
  Click to remove the data field from the visualization.

Date Dimension Options
Fields that contain dates are treated as discrete values by default. Date fields also have additional options that let you control the granularity of the data used in the visualization.

Select one of the date options in the upper group to change how discrete date values are used in the visualization. The lower group of date options defines how date values are used when it is treated as a continuous value, which can be useful in some visualizations like line charts.
In this example, we've changed the granularity of the second date field from Month to Quarter.

You can also click to create a new level of granularity for the dates used in the visualization. Alternatively, you can click to remove all lower levels of granularity from the visualization.
Marks Card

The **Marks** card features multiple options that let you control how data is represented in a visualization.

Click the drop-down menu to change the mark type to one that suits the data or your purposes the best.

**Additional Options**

You can add more detail to a visualization by dragging fields from the Data pane to the **Marks Properties area**. This allows you to change a new or existing mark's color, size, label, detail and tooltip settings.

In the example below, dragging the Receipt Value field from the Measures area to the Label property in the Marks area adds more detailed information in the form of text labels to the existing Receipt Value marks.
To change the appearance of existing marks in a visualization, click one of the Marks properties to bring up additional options.

You can also click the icon next to any existing field in the Marks card to assign a different property to it.
Filters Shelf
Using filters lets you easily select which data to include or exclude in a visualization. When you place a dimension or a measure on the Filters shelf, a new filter control will be inserted into the view. You can also use the same fields used in the columns and rows shelves to create an internal filter. Filter controls for discrete values allow you to select single or multiple values to include or exclude from the visualization. Filter controls for continuous values allow you to specify the range of values you want to include in the visualization.

Additional Filter Options
Click the arrow next to the name of the filter control to display additional options. Choose one of the available options from the drop-down menu to change how values are displayed and selected in the filter control. The types of filter control options that are available will depend on whether the field uses discrete or continuous values. Click Apply to Worksheets to select whether to apply a filter to only one worksheet or globally across all other worksheets in the workbook that are using the same field. You can also apply filter controls across worksheets that use different data sources, but have common or related fields. If you want to keep the filter control hidden from view whenever the report is viewed, click the Show Filter option to remove the check mark.
Pages Shelf

Drag and drop a **Dimension** to the **Pages** shelf, to break down the visualization into a series of pages that show how its field values affect the rest of the data.

**Note:** Placing a **Measure** in the **Pages** shelf automatically converts it into a discrete value.

In many cases, using the **Pages** shelf makes viewing and analyzing data much easier compared to simply placing the data field in either the **Columns** or **Rows** shelf to show the same tables in a single view as shown below.
Create a Calculated Field

If you need data that is not directly available from your current data sources, you can create a new **Calculated Field** to calculate the required information using values from existing data fields. After a Calculated Field has been created, it can be found in the Data Pane and can be used as part of your data source.

Click the drop-down on the top of the Dimensions area to open the Calculation Editor.

You can also click the drop-down to the right of a data field or right-click the data field itself to create a new Calculated Field.

The top portion of the Calculation Editor shows the name of the Calculated Field. Click the name to edit it.
If the workbook uses multiple data sources, the name of the currently selected data source will be displayed next to the Calculated Field's name.
Click the arrow on the right edge of the editor to show or hide an additional pane that lists all available functions by category (i.e., Number, String, Date, Logical, etc.), as well as a brief description for the selected function. Double-click any function to add it to the current formula in the Calculation Editor.

The Calculation Editor has an autocomplete feature that displays suggestions as you type a formula.
You can see whether the current formula is valid or invalid at the bottom of the window. This can help you avoid any syntax errors.

Formulas can contain the following elements:

- Functions
- Fields
- Operators
- Parameters (Create Parameter functionality not available in Web Editor)
- Comments

Click **Ok** to save the Calculated Field. Click **Apply** to update the calculation and worksheets using the calculation without closing the Calculation Editor.

Click the **X** on the upper right to close the window and discard any changes made.

You can identify Calculated Fields in the Data Pane by the equal sign (=) preceding a field's data type icon.
Create a New Dashboard
You can create new dashboards from scratch or change the layout of existing dashboards using the tools provided in the web editor.
Create a new blank dashboard using one of the following methods.

- On the bottom left of the web editor window click ![New Dashboard](link) to create a new blank dashboard.
- You can also right click any worksheet tab and select New Dashboard.
- The web editor toolbar also features buttons and drop down menus that allow you to create, duplicate and delete worksheets and dashboards.

Set the Dashboard Size
Click the Size drop-down to change the overall size of a Dashboard.
- Fixed - Pick a preset size or enter a custom size for the dashboard to always use.
- Range - Set a range of minimum and maximum sizes to make the dashboard fit two different display sizes.
- Automatic - Resize the dashboard to fit the browser window.

Layout Containers
Layout Containers let you move and resize worksheets that have been added to the dashboard, and can also be used to group worksheets together.
Select an attribute for a layout container or worksheet depending on how you want it to be displayed on the dashboard.
- Tiled - Dashboard elements with a tiled attribute are placed in a single-layer grid and will automatically resize to fit the dashboard page.
- Floating - Objects that use this attribute can be placed on above or beneath other dashboard elements and freely moved to any position.

Add a Worksheet or Layout Container
Double-click Blank under Objects to add a new empty layout container.
Add worksheets from the Dashboard pane on the left using one of the following methods.
- Right click the worksheet and select Add to Dashboard.
- Double click the worksheet to automatically add it to the Dashboard layout.
- Drag the worksheet from the Dashboard pane to the dashboard layout.

Note: Worksheets used in existing dashboards may be hidden from view. Right-click a worksheet and remove the check mark next to Hide Sheet to reuse it in a new dashboard.
You can also right-click the tab of the dashboard that contains the hidden worksheets and select Unhide All Sheets.
Once the Hide Sheet option has been removed, each worksheet should have its own separate tab on the bottom of the web editor and should be visible in the dashboard pane in all new dashboards.

Move and Resize Layout Containers
Click and drag the handle on top of a layout container to move it to a different position.
Click the horizontal and vertical edges of a layout container to resize it.
Click the drop-down to display additional options for the layout container.
You can switch from Tiled to Floating by leaving a check mark next to the Floating option.
Removing the check mark switches the layout container to Tiled.