



# OneOffice Dashboards

OneOffice Dashboards provide a powerful and flexible mechanism for delivering and displaying customised, context-sensitive information in WorkSpace. Dashboards are straightforward to build and simple to customise to the specific needs of users.

## Key Features at a Glance

- **Proactive Role-Based**  
Dashboards show the KPIs, management and summary information that are key to each user's role
- **Context-Sensitive**  
information is automatically updated based on the task a user is currently performing
- Displays supporting information for Alerts & Tasks directed to a user by Workflow
- Information is straightforward to customised to the needs of each user and role

## Benefits

- Improves productivity by displaying relevant information in context with the current transaction
- Enriches conversations with customers by providing appropriate information when it is valuable
- Informed decision making using information that is both accurate and current
- The use of standards based technology ensures that dashboards are straightforward to build and easy to modify

## Introducing Dashboards

Each dashboard comprises of web-pages that are displayed within panels in the WorkSpace. Their content is determined by the context in which a user is operating, the user's role and by specific events or actions.

Through extensive deployment of dashboard part technology, the Dashboard may be configured to display key information to the user in the context of the task they are performing. For example, the Dashboard could automatically show the last three sales orders, contact notes and specific promotions available when the operator selects a customer record. This means that the information people need to perform their roles effectively is always readily available.

The OneOffice Dashboards may be configured to display information in the following configurations:

A **Role-Based** Dashboard pane provides a "home" page that is displayed when the user connects to OneOffice. This may be used to display summary information relating to the user or the user's role. It may additionally provide links to commonly used functions or even embed aspects of some external applications within the page. This content may be customised at user or role-based levels to show a home page relevant to each individual user.

A **Context-Sensitive** Dashboard pane provides additional information and processing options relating to the task that the user is performing. As the user navigates through OneOffice programs selecting different customers, suppliers, products and so on, the Context-Sensitive Dashboard pane is automatically updated to show information relating to the current activity. This content may be customised at user or role-based levels to show information relevant to each user.

An **Alert & Task** Dashboard pane provides additional information and processing options relating to an Alert or Task that the user has elected to view. This provides the capability to show any information related to that Alert or Task depending on the user's role and current context within the WorkSpace.

Each page of information supplied by the Dashboard is assembled from a library of dashboard parts, each of which displays information relating to a specific aspect of the current context. Security settings on dashboard parts prevent them from being viewed by unauthorised users.



## Role-Based Dashboard

The purpose of the Role-Based Dashboard is to provide an initial view of information to the individual user. For example, a sales representative may be presented with a summary view of activity within the customers for which they are responsible, e-mail links to the contacts for a selected customer together with a summary of outstanding quotations.

The information displayed here either relates to the role that the user fulfils, or may be customised on an individual user basis.

In addition to displaying information from OneOffice, folders from Outlook may also be presented within the Role-Based Dashboard. This may be used to show an e-mail inbox, task list or calendar for example.

The content within the Role-Based Dashboard may be active; for example, one dashboard part showing a list of customer accounts and another showing a contact list for the currently selected account. This provides a great deal of flexibility in navigating through summary information and drilling down for further details.

When viewing summary information through the Role-Based Dashboard, a user will typically wish to carry out some tasks in respect of a customer, contact, product or other item they have selected. Having selected an appropriate record, the user may execute a specific back office function utilising all currently available information; for example, they may wish to place a new order for a customer, amend an existing quotation or send an e-mail to a contact.

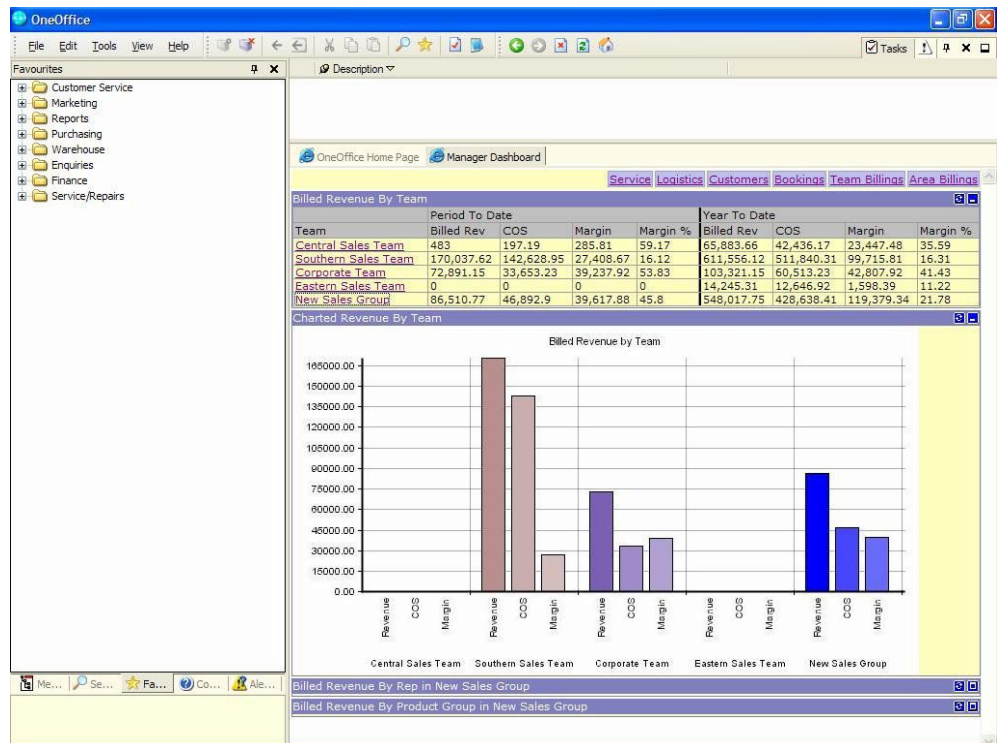


Figure 1. These Role Based-Dashboards are being used by a sales manager. In this example the current dashboard includes a graph showing a comparison between the performance of different sales teams.



## Context-Sensitive Dashboard

The purpose of the Context-Sensitive Dashboard is to display additional information relating to the activity currently being carried out within OneOffice. For example, a credit-controller may wish to always have an up-to-date view of all customers over their credit limit together with payment history for the customer they are dealing with.

The information displayed here is determined by both the role that the user fulfils and the context in which they are operating within the OneOffice application at the time. So, for example, the user may wish to see credit related information when a specific customer is selected but only summary purchasing statistics and

notes when a specific vendor is selected. The Context-Sensitive Dashboard may also be customised on an individual user basis.

All of the options that are available in the Role-Based Dashboard may be used in a Context-Sensitive Dashboard, including linking dashboard parts together as selections change, launching OneOffice programs and opening new Dashboard pages in the main Workspace area.

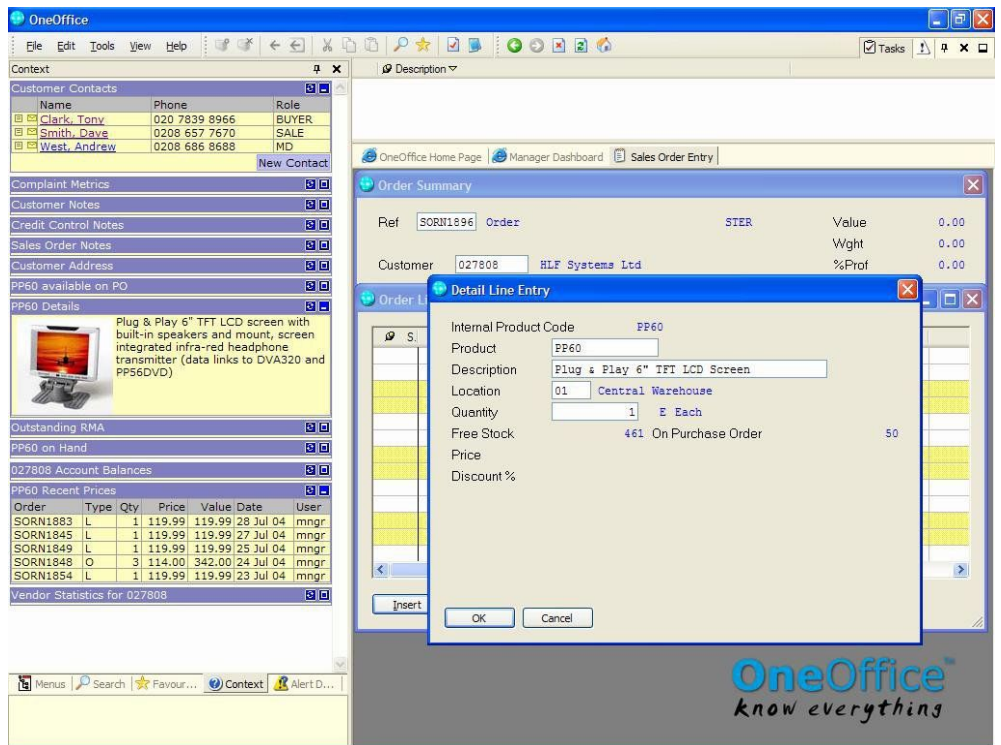


Figure 2. Use Context Sensitive dashboards to display relevant to the context of a task a user is undertaking (for example entering an order for product 'A' for customer 'B') and the role of the user.



## Alert & Task Dashboard

The Alert & Task Dashboard is activated when an Alert or Task is selected by the user. Its purpose is to display any additional information of specific interest to that user in respect of the selected item.

The information displayed in this dashboard is customisable based on the role of the current user and the nature of the item selected. It may also be customised for any specific user.

All of the same options that are available in the Role-Based Dashboard may be used in an Alert & Task Dashboard; linking dashboard parts together as selections change, launching OneOffice programs and opening new Dashboard pages in the main WorkSpace area.

**Alert Details**

Linked Order Available Date Changed		
Customer	027808	HLF Systems Ltd
Product	06810R1	6 Disc DVD Changer - Regrade1
Sales Order	SORN1894	Line 40
Supplier	BANT015	
Purchase Order	PORD3036	Line 20
Value	139.99	STER
Cost		105.59
Required Date	30 Jul 04	
Commit Date	14 Aug 04	
New Cost	0.00	STER
New Commit Date	03 Aug 04	

[Amend](#) [View](#) [Options](#)

**SORN1894 Linked Lines**

Product	PO	Qty	Value	Required	Commit
06650	PORD3036	1	599.00	30 Jul 04	03 Aug 04
Airmate T3/150 SRB 3.0 Package					
06810R1	PORD3036	1	139.99	30 Jul 04	03 Aug 04
6 Disc DVD Changer - Regrade1					

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Figure 3. When the OneOffice Workflow Engine directs a Task or Alert to a user, the Alert & Task Dashboard displays additional information to enable the user to take well informed decisions. In this example the user has chosen to see linked purchasing information when a customer order is in peril.



## Intranet Integration

In addition to containing information from the OneOffice Dashboard, the OneOffice WorkSpace can host any Intranet or Internet site, giving a user a single interface to all internal systems and external sources of information.

In addition, OneOffice Dashboard technology can deliver rich, real-time content directly into corporate Intranets.

Links to OneOffice programs and information from the OneOffice system may be seamlessly incorporated with other web based applications.

Using web services, external, web based applications can be closely integrated with OneOffice. For example, a subscriber to a third party

credit rating service may choose to link a summary of credit alerts into a dashboard which then directs the user to the full information available within the browser window.

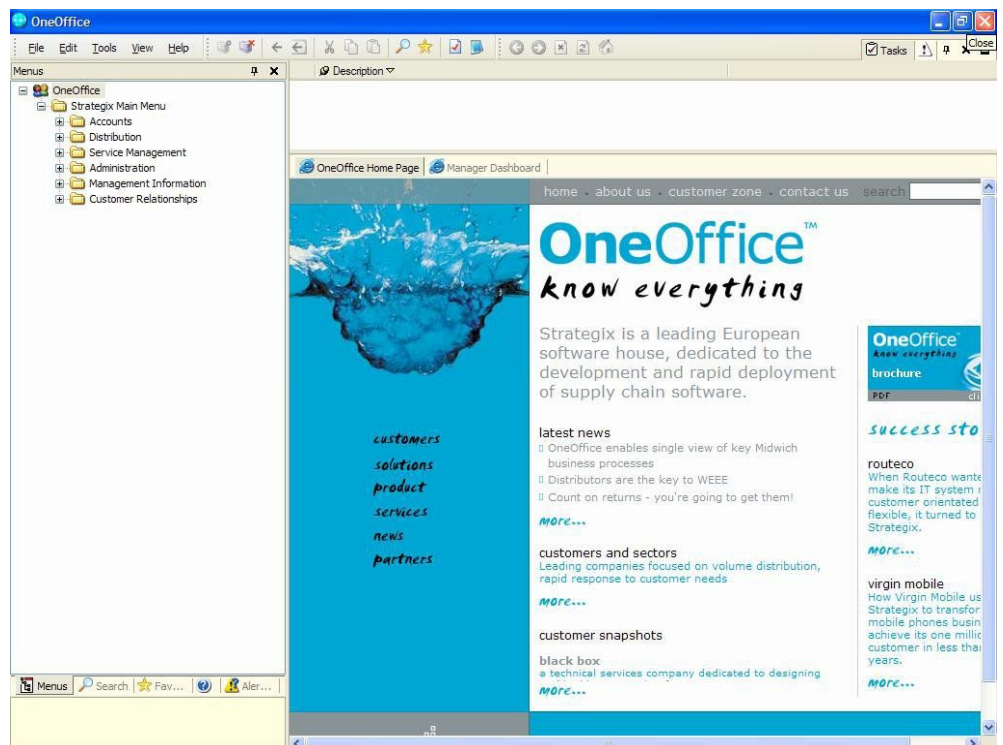


Figure 4. OneOffice WorkSpace can display your intranet site and supplier/customer extranet sites ensuring that your users can access the information they need quickly and easily.



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## Summary

The outstanding flexibility of OneOffice Dashboards puts you in the driving seat.

Information which is important to each user, in every role, can be delivered in real-time to aid better decision making and reduce mistakes.

Significantly, the ability to present relevant data in context with the transaction being processed by the user in OneOffice can greatly improve productivity, reduce training needs and enhance users' satisfaction with the way their own roles are supported by the system.

As your business changes over time existing Dashboards can be modified and new ones added.

In conclusion, OneOffice Dashboard delivers the right information to the right people at the right time, including:

- Information which is customised to the role of each user
- Information which is relevant in the context of any transaction or customer/supplier interaction
- Information which helps users decide how to respond to Alerts and Tasks
- Information which helps users to easily navigate through your business processes
- Information which means greater efficiency and profitability

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