ISOpro

ISOPro Reporting, Notification and Dashboards

Background

Reporting and notifications (alerts, reminders, escalations etc.) are a critical component of rules-based compliance management.

Dashboards allow users to quickly see their "open" actions.

ISOPro has designed its UX (user experience), i.e. its look and feel, navigation and visibility of information around the user's *operational* needs and making sure the system is easy to use, uncluttered and not requiring user-level configuration.

Most ISOPro users are lower-level operations staff who have service-delivery activities to perform and use the system to record event outcomes, not actually deliver their service.

There is a tendency in software UX design to cram more and more features into the available UI, however, at ISOPro we believe this is counter-productive. Most UI features are added not because they're required by users but to meet the expectations of decision-makers in the software's purchasing decision (who typically will not be the system's core users!). We believe UX design should be approached critically from a user needs and usability perspective rather than an *"all available features"* perspective.

REPORTING

ISOPro has 4 different ways of providing aggregated information outputs:

- Custom Excel reports
- On demand raw data exports
- Summaries delivered via scheduled email
- Reporting server

Refer to screenshots in Annexure A of the various types of reports.

#	Report Type	Details
1	Custom Excel reports	These are based on client-specific Excel TEMPLATES that are populated with real-time data as the report is downloaded.
		Each report has a timestamp indicating the date/time it was downloaded.
		The customisation is limited by Excel's functionality and practicality of file size.
		The client's report owner can determine the report's data parameters, layout, fonts, colours, graph types, branding etc.
		These can be accessed in the RECORDS module and downloaded as required
2	On demand raw data exports	Each module has its own types of exports most suited to the data in the module.
		These raw data exports are delivered directly into Excel (.xlsx) format.
		These can be run from each module using the "reports" button and selecting the various types of pre-configured export formats.

3	Summaries delivered via scheduled email	These customised emails can be configured for each client to contain summaries of information across multiple information objects (e.g. summary of specified fields across multiple form templates) and can be scheduled to different recipients or recipient groups at scheduled times at set frequencies.
4	Reporting server & data export automation	ISOPro has a reporting server that updates regularly and allows clients direct access via a webservice to their in-house BI or data mining tool, or export of the complete data set to the client's internal data warehouse.
		The data includes all content, metadata and attachment files.
		Draft technical specifications will be released to clients prior to the launch and final configuration can be customised to suit client needs. The costs are not included in pricing provided.
		Scheduled and structured data extracts can also be delivered to clients via email or secure location if security risks are acceptable.

In addition to the aggregated data output, each information object (individual form record, document etc.) can be exported individually in either a custom format or in its standard ISOPro PDF format.
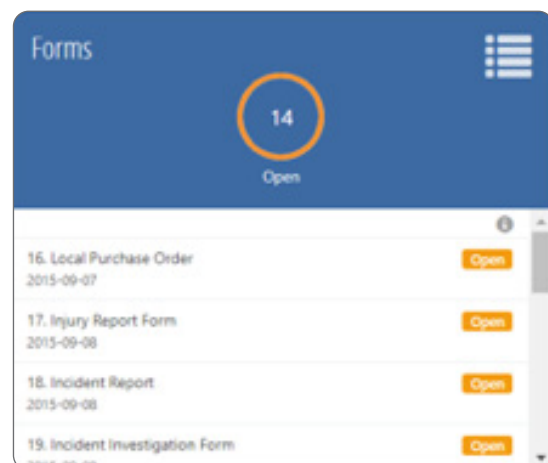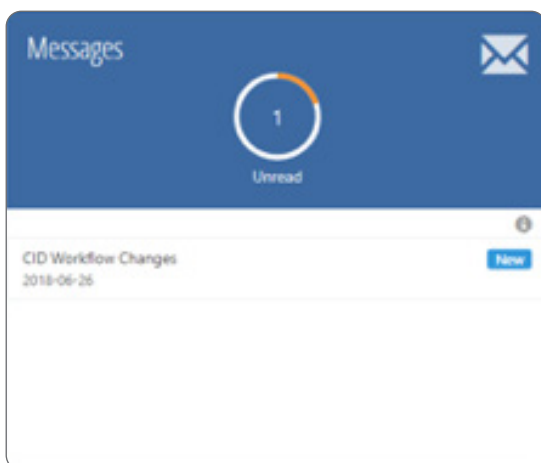
Individual information objects can also be **shared** by printing or emailing

DASHBOARDS

Dashboards are designed for fast navigation, not for statistical data views. Aggregated information is available in reporting. The ISOPro HOME page has an activity-orientated dashboard that allows users to see all their open actions and navigate to them directly with one click.

In addition, all ISOPro modules have individual contents lists that make it easy to find relevant information and navigate to it.

The dashboard shows the user's open and due action items and each item can be accessed by one click.

CIDs

1

Action(s) / Review(s)

3. Description of the Event Description "test" ...   For Action
2019-03-26

Documents

1

Unread

3. Sample Linked Document   Unread
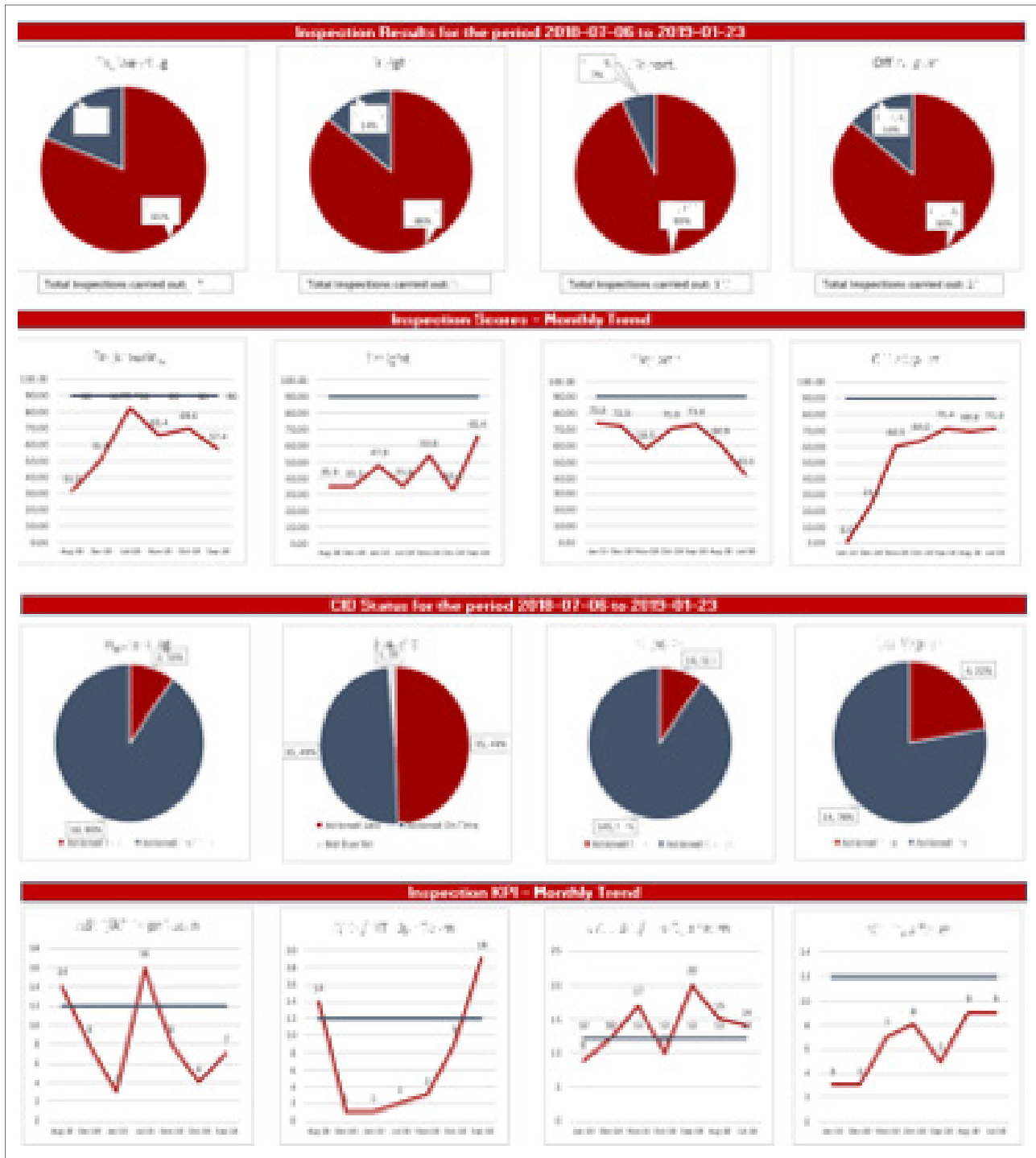2019-03-13

Training

1

Upcoming

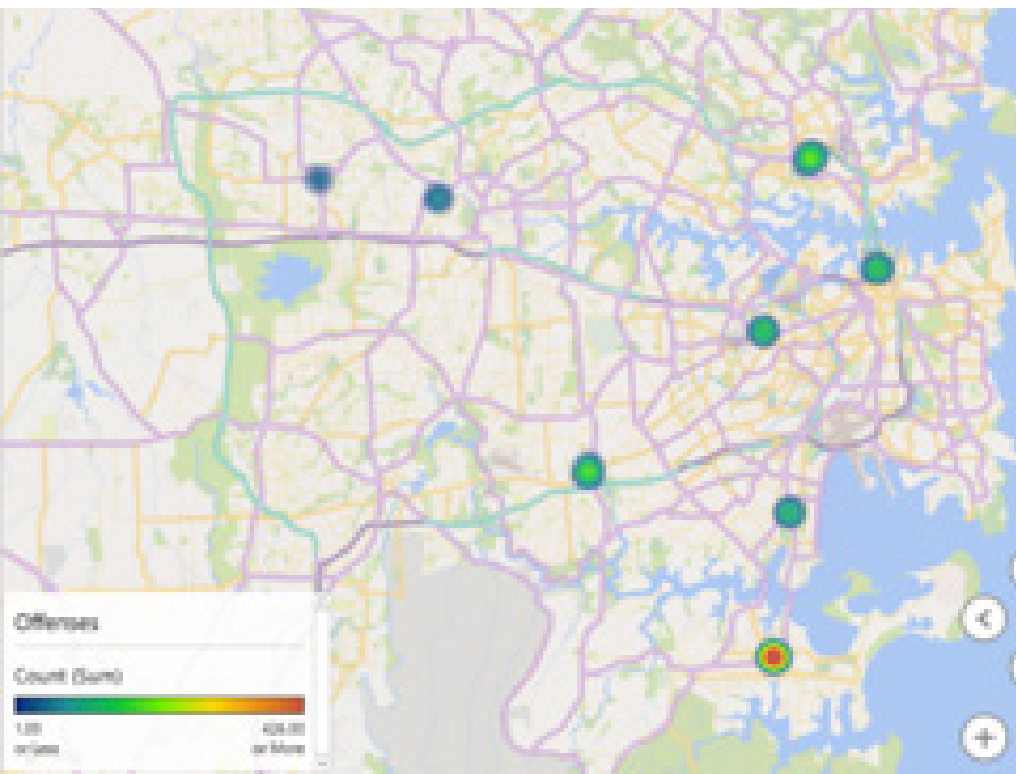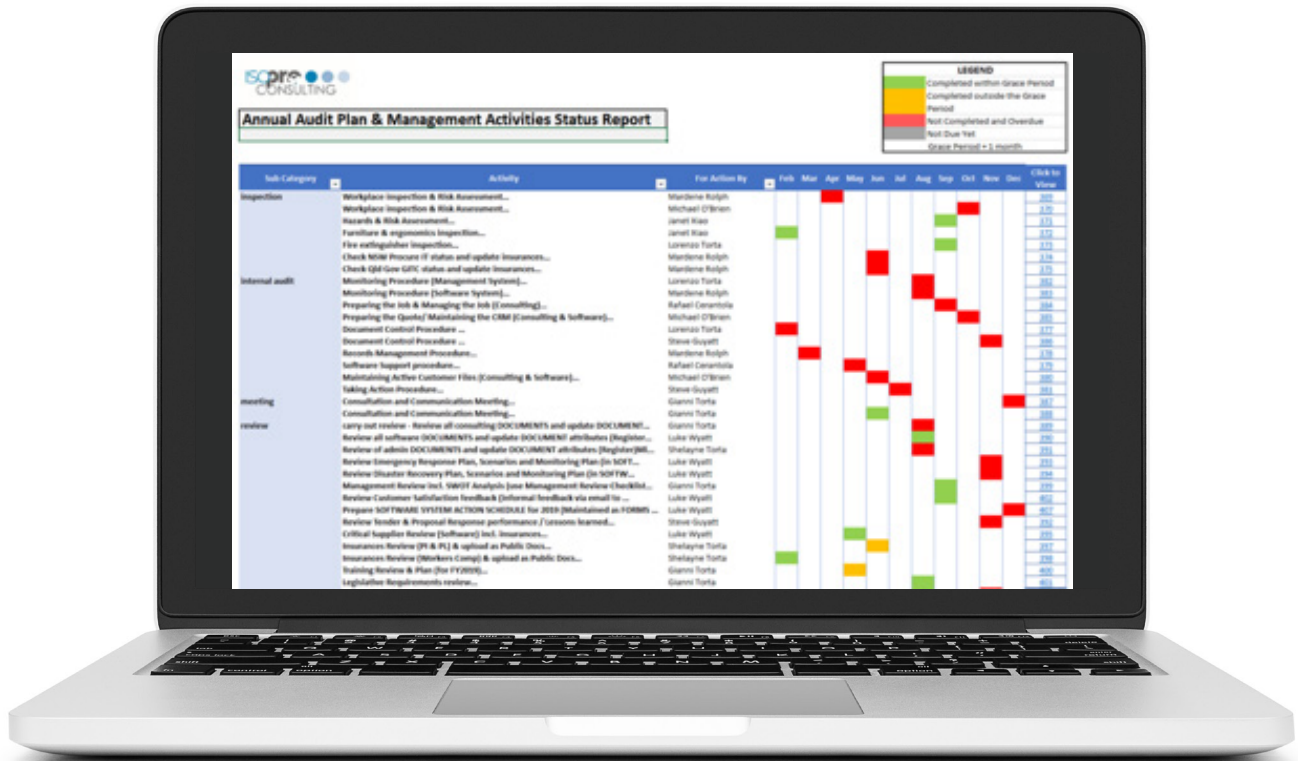5. Managing Contractor Ce... | DUNDEE, Mick   Due
2018-09-09

ANNEXURE - Report screenshots

1. Sample Custom Excel reports

Sample graphical output of data captured on an ISOPro form displayed as a heat map by geo-location.

2. On-demand raw data exports

ISOPro has a standard report queries and output data sets.

Users can create and save their own report templates and also set their own query parameters to export the data set to Excel OR to view the results onscreen.

On-demand exports are downloaded to Excel.

3. Summaries delivered via scheduled email

4.   Reporting server & visualisation tools (e.g. PowerBI)

ISOPro's Reporting Server updates client data daily allowing the client's data teams to either:

- ⊘ plug their data warehouse into the reporting server and transfer data daily from ISOPro to the in-house repository
- ⊘ plug their BI/data visualisation tools directly into the reporting server and build their own custom dashboards and reporting suites.

The screenshot alongside is a sample of the dashboarding that is possible using a high-level data visualisation tool directly accessing the reporting server data.