System Overview-Dashboard

English

Version: v1.0

Dashboard

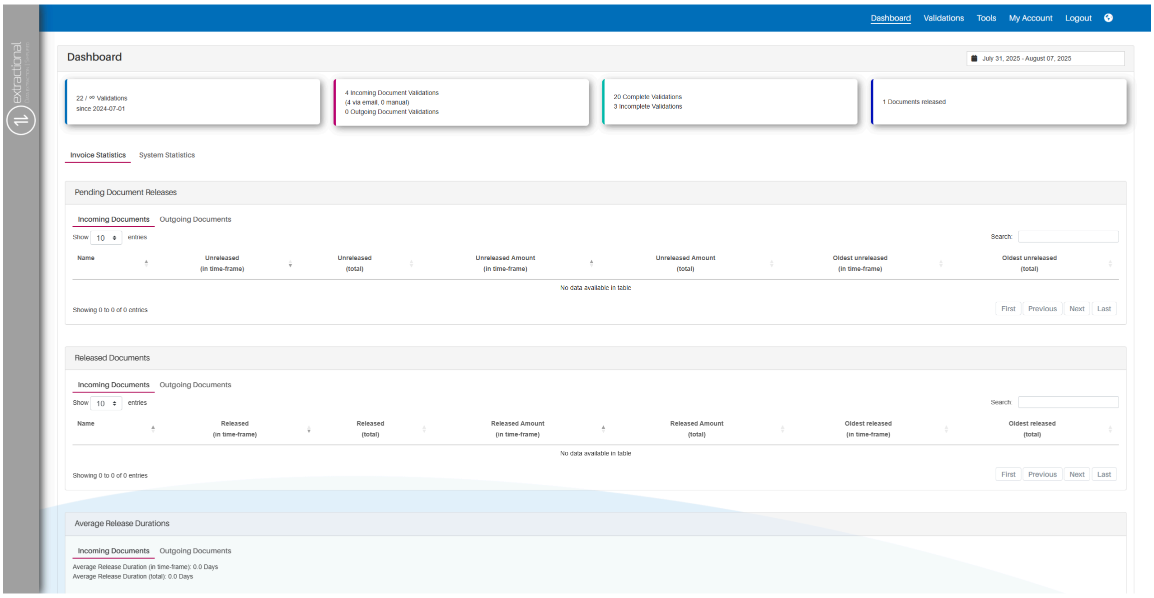
What is the main purpose of the this page

In this dashboard page you will find many useful tables and statistics that will help you organize and overview your work.

If you are a super user or a similar person who has the rights to observe all of your companies users and documents, you will also have some additional visualizations and tables at your own disposal helping you analyse the performance of the users and the future money outflow.

In the following paragraphs, you shall find all the different tables and visualizations that are at your disposal.

Overview



Defining your Time Period

Before performing any analysis or interacting with the dashboard, it is essential to first define the time period within the dashboard. The selected time period determines which documents will be included in all tables and visualizations available for use.

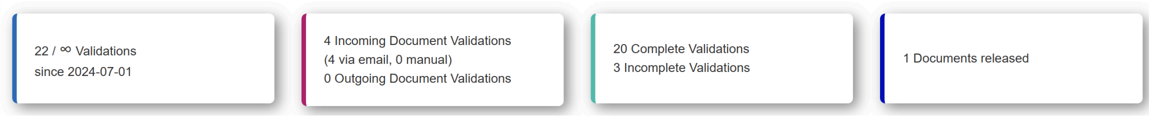
To modify the time period, click the current time period text box located at the top of the screen and adjust it according to your preferences. For more detailed information on how to change the time period, please refer to the (following link), which will redirect you to the relevant section of this manual where the time period submenu is explained in greater detail.

Analysing General Statistics in the Initial Boxes

One of the first elements you will notice on the dashboard page are four boxes displaying general statistical information about your system.

First Look

To help identify the boxes referenced, a visual example of how these boxes appear in your system is provided below.



Information Provided in These Boxes

These boxes contain general information designed to help you quickly assess the current state of the system. This can provide useful information and help you prioritize your tasks or company operations accordingly.

Navigation Through the Different Tabs

On the Dashboard page, all features are divided into separate subpages. You can navigate between these pages by switching tabs at the top of the screen.

Here is an example of what these tabs should look like:

The following sections explain the features available on each of these pages.

Invoice Statistics

This subpage of the dashboard displays statistical information related to documents released within the selected time period.

> ⚠ **Important information**
>
> Before analysing the documents currently in the system, please note that if you do not have permission to view others' validations, you will only see documents released by you.

We will now walk through each visualization available on this subpage.

Pending Document Releases Table

Overview

This table displays all documents that are currently pending release in your system. It shows the person each document is assigned to, along with detailed information about the number and value of documents each individual is responsible for releasing.

Below is an example of how this table appears:

Pending Document Releases

Incoming Documents   Outgoing Documents

Show 10 entries   Search:

Name	Unreleased (in time-frame)	Unreleased (total)	Unreleased Amount (in time-frame)	Unreleased Amount (total)	Oldest unreleased (in time-frame)	Oldest unreleased (total)
Tom Kieffer (tk@extractional.com)	2	14	0.0 €	477641.68 €	2025-08-06	2023-07-03
Unassigned Documents	1	4	0.0 €	224.8 €	2025-08-06	2023-06-26
Andre Wellnitz (andre.wellnitz@fkieffer.com)	0	3	0.0 €	146.37 €		2024-06-27
Maria Schmidt (ms@extractional.com)	0	2	0.0 €	0.0 €		2023-07-05

Showing 1 to 4 of 4 entries   First Previous 1 Next Last

Released Documents Table

Overview

This table displays all documents that have already been released in your system. Each entry includes the person the document is assigned to, as well as various statistics, such as the number and value of documents released per individual. In addition, all the documents that have been released without some one assigned to it will be represented in a separate representative row (also called `"Unassigned Documents"`).

Here is an example of what the table looks like:

Released Documents

Incoming Documents   Outgoing Documents

Show 10 entries   Search:

Name	Released (in time-frame)	Released (total)	Released Amount (in time-frame)	Released Amount (total)	Oldest released (in time-frame)	Oldest released (total)
Tom Kieffer (tk@extractional.com)	0	1	0.0 €	58207.12 €		2024-07-02
Renaud Kieffer (rk@extractional.com)	0	1	0.0 €	58207.12 €		2024-07-01
Unassigned Documents	0	3	0.0 €	47745.22 €		2025-02-03
Andre Wellnitz (andre.wellnitz@fkieffer.com)	0	1	0.0 €	48.79 €		2024-07-09
Maria Schmidt (ms@extractional.com)	0	2	0.0 €	0.0 €		2023-07-25
Manfred Muench (admin@baiamedia.com)	1	1	0.0 €	0.0 €	2025-08-06	2025-08-06

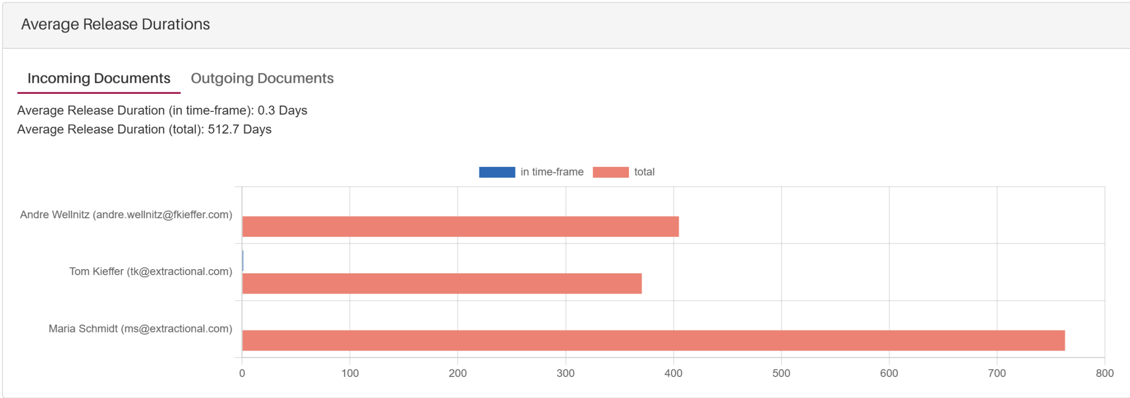
Showing 1 to 6 of 6 entries   First Previous 1 Next Last

Average Release Durations

Overview

This histogram shows the average time each individual takes to release assigned documents.

To aid your understanding, here is an example visualization:



Navigating the Histogram

Each row represents a team member along with the average release time for that individual. Depending on the box color, the displayed average may refer to either:

- The average duration within the defined time period, or
- The overall average release time across all their documents.

To switch between **Incoming** and **Outgoing** documents, use the tabs at the top of the histogram.

To hide one of the categories (`"In Time-Frame"` or `"Total"`), simply click on the respective category label at the top of the histogram.

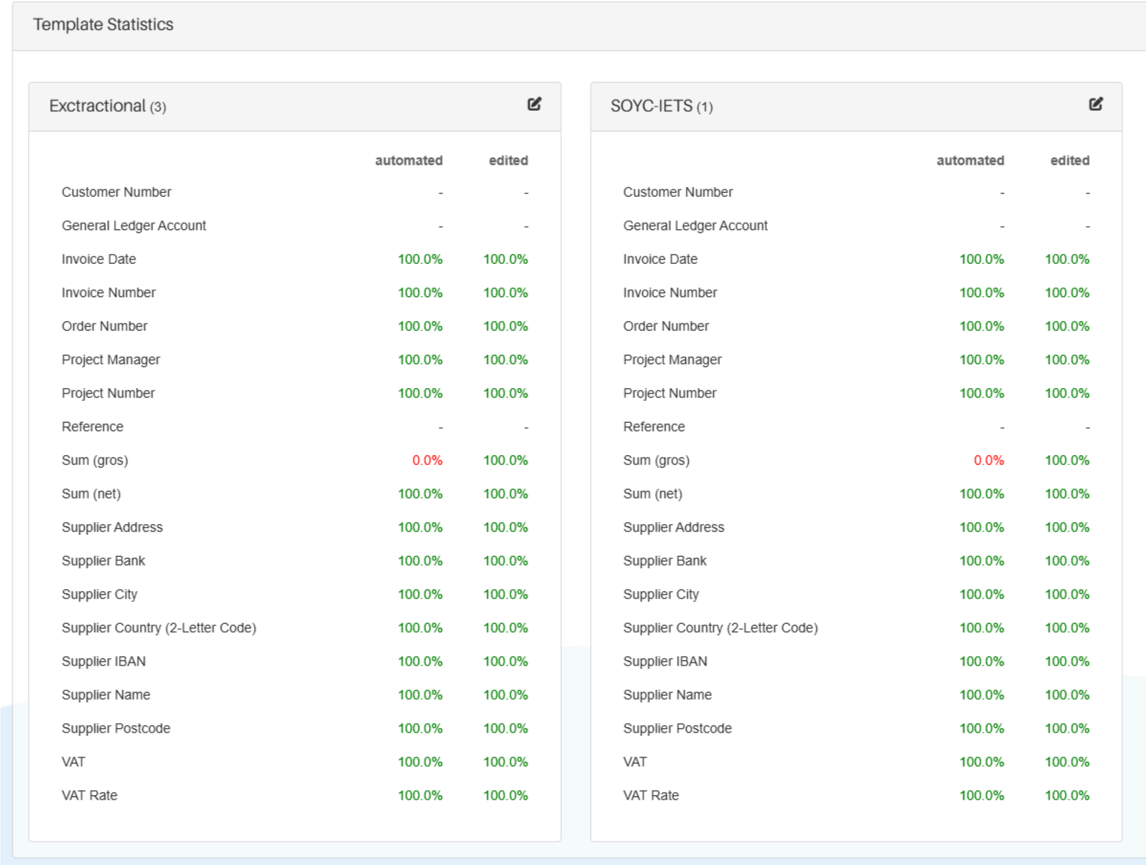
Template Statistics

Overview

This sub-section allows you to visualize the performance of each template used during the selected time period.

> ⚠ **Important information**
>
> Please note that if you do not have the necessary permissions to create or modify templates, this page will appear empty.

Below is an example of what this page looks like:



Template Statistics

Exctractional (3)

	automated	edited
Customer Number	-	-
General Ledger Account	-	-
Invoice Date	100.0%	100.0%
Invoice Number	100.0%	100.0%
Order Number	100.0%	100.0%
Project Manager	100.0%	100.0%
Project Number	100.0%	100.0%
Reference	-	-
Sum (gros)	0.0%	100.0%
Sum (net)	100.0%	100.0%
Supplier Address	100.0%	100.0%
Supplier Bank	100.0%	100.0%
Supplier City	100.0%	100.0%
Supplier Country (2-Letter Code)	100.0%	100.0%
Supplier IBAN	100.0%	100.0%
Supplier Name	100.0%	100.0%
Supplier Postcode	100.0%	100.0%
VAT	100.0%	100.0%
VAT Rate	100.0%	100.0%

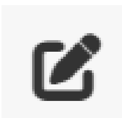
SOYC-IETS (1)

	automated	edited
Customer Number	-	-
General Ledger Account	-	-
Invoice Date	100.0%	100.0%
Invoice Number	100.0%	100.0%
Order Number	100.0%	100.0%
Project Manager	100.0%	100.0%
Project Number	100.0%	100.0%
Reference	-	-
Sum (gros)	0.0%	100.0%
Sum (net)	100.0%	100.0%
Supplier Address	100.0%	100.0%
Supplier Bank	100.0%	100.0%
Supplier City	100.0%	100.0%
Supplier Country (2-Letter Code)	100.0%	100.0%
Supplier IBAN	100.0%	100.0%
Supplier Name	100.0%	100.0%
Supplier Postcode	100.0%	100.0%
VAT	100.0%	100.0%
VAT Rate	100.0%	100.0%

Navigating Within This Subpage

Each template used within the defined time period is displayed as an individual tile. Within each tile, you will find extraction accuracy metrics for each field associated with that template.

If you wish to edit a specific template, you can do so directly by clicking the edit icon located in the top-right corner of the template tile. The edit icon appears as follows:

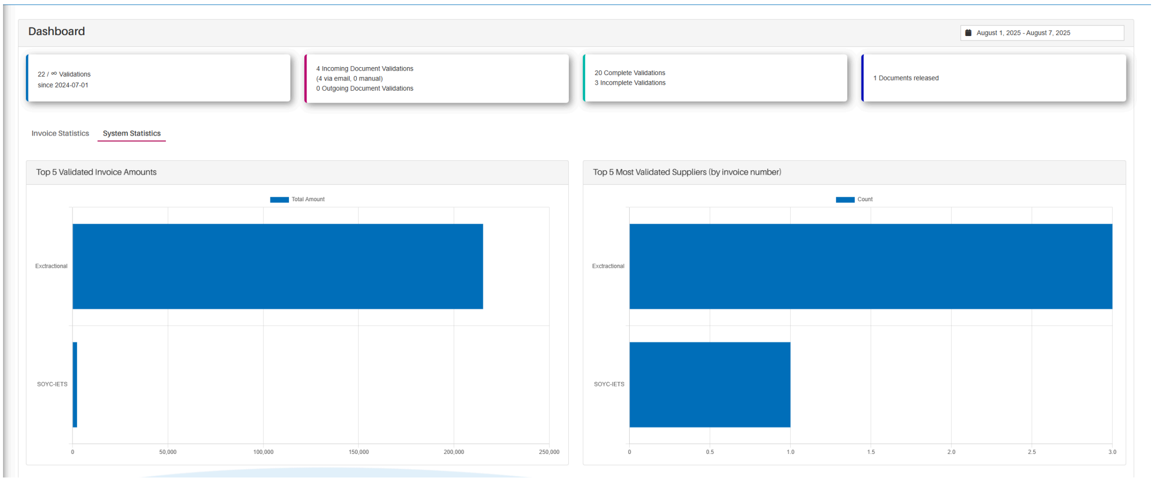


System Statistics

This subpage provides an overview of statistical information related to the overall system performance during the selected time period.

> **Important information**
>
> Since no sensitive information is presented in these visualizations, all users are granted full access to this subpage.

An example of this page layout is shown below:



Navigating Through the Visualizations

As you scroll through this page, you will encounter various histograms and other types of visual representations. The following interaction features are available:

- To view specific values or additional information for a particular data point within a visualization, simply hover your mouse over it. A tooltip will appear with detailed information.
- Some visualizations offer parameter tabs that allow you to filter or adjust the displayed data. To change the parameters, switch between the available tabs.

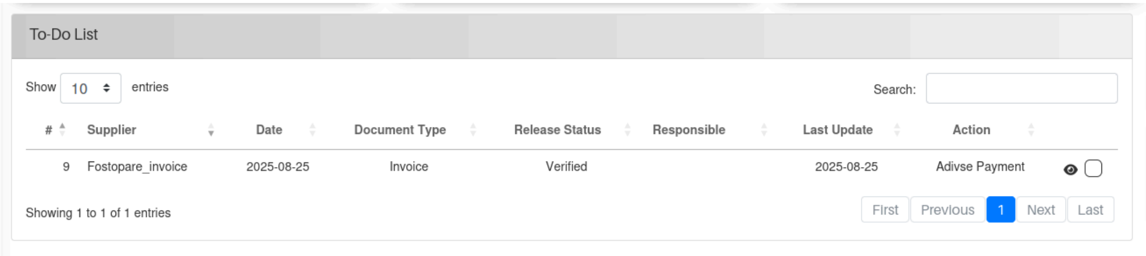
To-Do List

Overview

In this list, we will be visualized with the different validations that are currently assigned to you and that shall be treated by you.

> **Note**
>
> Please pay attention that all validations shown in the to-do list only appear accordingly to the time period that has been selected.

The to-do list shall be positioned at the beginning of the dashboard and should look like this:



How to directly interact with one or several validations

In order to directly visualize one visualization, you will simply need to click on the view button of the respective validation.

Additionally, if you would like to view several validations at the same time, can select all the desired validations in the table and click on the view button of one of the validations and all the validations will be opened in the system.