

OnBase: Dashboards

Introduction	1
Navigating to dashboards	1
How to use a dashboard	2

Introduction

This guide will show how to navigate and utilize the OnBase dashboards.

Navigating to dashboards

1. Web Client

OnBase Web Client - Reporting Dashboard Menu Navigation 1

× Reporting Dashboards		OnBase ⁻	☆	· · · · ·
Document				
Document Retrieval				
Custom Queries				
Knowledge Transfer	_			
Open Knowledge Transfer				
StatusView				
Open StatusView				
User		\mathbf{O}		
Locked Objects	·	Select a dashboard or report to display		
Reporting Dashboards				
Gallery	-			

OnBase Web Client - Reporting Dashboard Menu Navigation 2

Reporting Dashboards OnBase														☆		~
llery	SCSU HRS	Lecture Appoi	intmen	t For	m Dashbo	ard									Export Data	G
Public Items							SCSU H	RS Lecturer	Арро	intment f	Form Dashboa	rd				Ċ)
Scsu HRS Lecture Appointment Form Dashboard	Lectur	er Appointme	nts												Department	
	LAF	Status	D	Υ	Арро	١.,	Department	Employ	F	I Las	Email Addr	Le	Tot	Appoi	Select	•
	744	APPRO	1	2	SPRI	S	COUNSELI	PART TI	E							
	744	APPRO	1	2	SPRI	S	COUNSELI	PART TI	в		(a) (b) (b) (b) (b) (b) (b) (b) (b) (b) (b	10			Appointment Status	5
:	744	REVISED	1	2	SPRI	S	COUNSELI	PART TI	A			20			(AII)	
	744	APPRO	1	2	SPRI	S	COUNSELI	PART TI	J			20				
	745	SCSU L	1	2	SPRI	S	COUNSELI	PART TI	A						Semester	89
	747	SCSU L	1	2	SPRI	S	COUNSELI	PART TI	к						(All)	
	759	REJECT	1	2	SPRI	S	COUNSELI	PART TI	L						2024, SPRING	3
	759	SCSU L	1	2	SPRI	S	COUNSELI	PART TI	м						2024, SPRING	i
	759	REJECT	1	2	SPRI	S	COUNSELI	PART TI	J		100	10			2024, SUMME	
	759	REJECT	1	2	SPRI	S	COUNSELI	PART TI	R			20			2024, SUMME	
	759	REJECT	1	2.	SPRI	S	COUNSELI	PART TI	D			с.			2024, SUMME	£
Shared With Me	Lectur LAF 744 744 744 744 745 759 759 759 759 759 759 759 759 759 759	Approximation of the second se	D D 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Y 2 2 2 2 2 2 2 2.	Appo SPRI SPRI SPRI SPRI SPRI SPRI SPRI SPRI SPRI SPRI SPRI SPRI	I S S S S S S S	Department COUNSELL COUNSELL COUNSELL COUNSELL COUNSELL COUNSELL COUNSELL COUNSELL COUNSELL COUNSELL COUNSELL	Employ PART TI PART TI PART TI PART TI PART TI PART TI PART TI PART TI PART TI PART TI	F E B J A K K K K K E B B	I Las 	Email Addr		Tot	Appol	Department Select Appointment Status (AII) Semester (AII) 2024, SPRING 2024, SUMME 2024, SUMME 2024, SUMME	× 5

2. Unity Client

Reporting Dashboard –	· Unity Client locat				
File Home Document				Last Login: 6	/21/2024 9:33:48 AM
Personal Page - Favorites Favorites	Envelopes Document Handle Query History Trash Can My Checkouts Documents	Forms Import Templates	Reporting Internal Mail	Approval Management - Vorkflow	Combined Viewer - Combined Viewer
Document Retrieval Document Types and Groups	Search Results		Reporting Dashboards View, create, and share dashboards and reports		
<pre> </pre> <pre> </pre>			L	_	
ACD Articulations					
Keywords and Date Range (X) rom Y To Y III					

Reporting Dashboard – Unity Client location

How to use a dashboard

- 3. Sorting the grid
 - a. You can click on the header of any column to sort by that information.

OnBase Web	Client - Reporting	Dashboard –	Column Header Sorting
	cheft hepotting	Dustibulu	

≡	Reporting Dashboards OnBase													1		v
	SCSU HRS Lect	ure Appointment Form [Dashboard												Export Dat	5
		Ň			1	SC	SU HRS Lecturer A	Appointment Form Dashboard								Ċ
	Lecturer A	opointments														
	LAF Doc	Status	Date E	Y	Appointment Session	I	Department	Employee Category	F	MI	L	Email	A	L	Total Load (Sum)	Ap
	1000	REVISED	12/14/	2	WINTER	S	COUNSELING/	PROFESSOR (FT)	U		N			\$	0.22	\$5
		APPROVED	1/2/2024	2	WINTER	S	COUNSELING/	PROFESSOR (FT)	U		N			\$	0.11	\$2
2		APPROVED	4/30/2	2	SUMMER B6	S	COUNSELING/	PROFESSOR (FT)	C		S	:		\$	6	\$1
٣		APPROVED	4/30/2	2	SUMMER B6	S	COUNSELING/	PROFESSOR (FT)	М.,	. м	G	(\$	3	\$7
		REJECTED	4/30/2	2	SUMMER B6	S	COUNSELING/	PROFESSOR (FT)	U		N	1		\$	5	\$1
		REJECTED	5/3/2024	2	SUMMER B6	S	COUNSELING/	ASSOCIATE PROFESSOR (FT)	L	Α.	В	(\$	4.5	\$1
		APPROVED	5/20/2	2	SUMMER B6	S	COUNSELING/	PROFESSOR (FT)	М.,	. м	G	(\$	2	\$5
		APPROVED	5/20/2	2	SUMMER B6	S	COUNSELING/	PROFESSOR (FT)	L		F			\$	1.5	\$3
		PROVOST/VP AP	5/23/2	2	SUMMER B6	S	COUNSELING/	PART TIME LECTURER – A	N		o	(\$	2	\$3
		APPROVED	5/29/2	2	SUMMER B6	S	COUNSELING/	ASSOCIATE PROFESSOR (FT)	J	L	P	1		\$	1.33	\$3
		REJECTED	5/30/2	2	SUMMER B6	S	COUNSELING/	PART TIME LECTURER – A	A		L			\$	3.75	\$7
	1000	DEAN APPROVED	5/31/2	2	SUMMER B6	S	COUNSELING/	PROFESSOR (FT)	U		N	1		\$	2	\$5

4. Filters

a. Some dashboards have filters on the right side. Use check boxes to hide or show rows in the grid.

OnBase Web Client - Reporting Dashboard – Filtering

=	Reporting Dash	boards						OnBa	se	9 .						☆ -		
	SCSU HRS Lectur	re Appointment	Form Da	shboard		SC	SU HRS Lectu	rer App	oint	tment	Form	Dashboard					Export Data	<u>ک</u>
	Lecturer App	pointments														Department		
	LAF Docu	Status	Date	Year	A ↓	Department	Employee C	Firs	Μ	Last	N	Email Address	Lect	Total L	Appointm	Select		•
		PROVOS	5/23	2024	SU	COUNSELING/S	PART TIME	NAA		¢			3	2)			
		DEAN AP	5/31	2024	SU	COUNSELING/S	PROFESSO	UC		1			3	2)	Appointment Statu	s	$\overline{\mathbb{T}_{x}}$
5		DEAN AP	6/3/	2024	SU	COUNSELING/S	PART TIME	AN		ι			3	4)	(All)		
1		DEAN AP	6/7/	2024	SU	COUNSELING/S	ASSOCIATE	LA	A	E				6	(1	APPROVED		
													-			DEAN APPRC PROVOST/VF Semester (All)	OVED	K N N

- 5. Export to Excel or PDF
 - a. Click the export icon on the top right of the information grid.

Reporting Dashboard - OnBase Web Client - Exporting Report

porting Dashb	boards						UnB	ase						T		
SU HRS Lecture	e Appointment	Form Das	hboard												Export	Data 🦉
					sc	SU HRS Lectur	rer App	pointr	nent Form	Dashboard						
Lecturer App	ointments													Departm	Export 7	то 🖌
LAF Docu	Status	Date	Year	A ↓	Department	Employee C	Firs	Ν	Last N	Email Address	Lect	Total L	Appointm	Select	LPDF	XII
LAF Docu S	PROVOS	5/23	2024	SU	COUNSELING/S	PART TIME						-				
	DEAN AP	5/31	2024	SU	COUNSELING/S	PROFESSO						2		Appointmen	t Status	к.». Т <mark>х</mark>
	DEAN AP	6/3/	2024	SU	COUNSELING/S	PART TIME	=				1	4		(All)		
	DEAN AP	6/7/	2024	SU	COUNSELING/S	ASSOCIATE						6	4	APPRO	OVED	
														V DEAN	APPROVED	
														PROVO	ST/VP APPRO	VED

- 6. Opening a document from a dashboard
 - a. Double click on a row
 - i. Sometimes a double click doesn't work, try clicking five times quickly.

.