Southern Connecticut State University
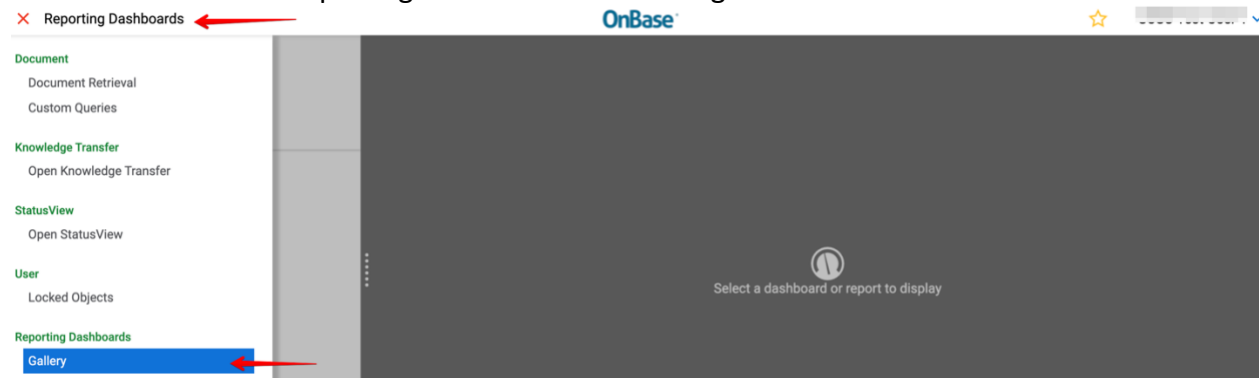
OnBase: Dashboards

Introduction

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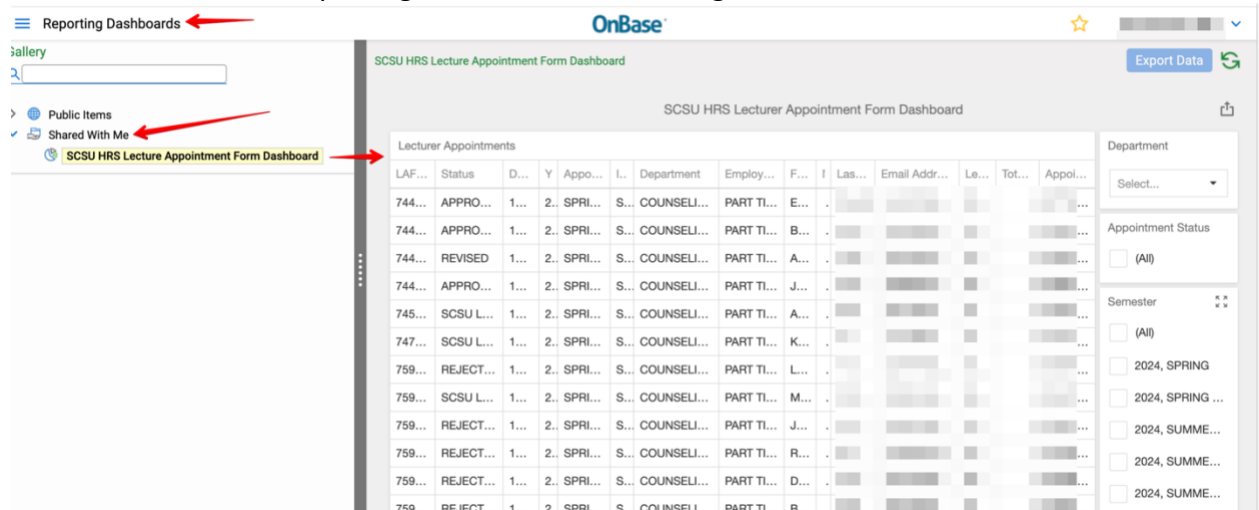
Navigating to dashboards

1. Web Client

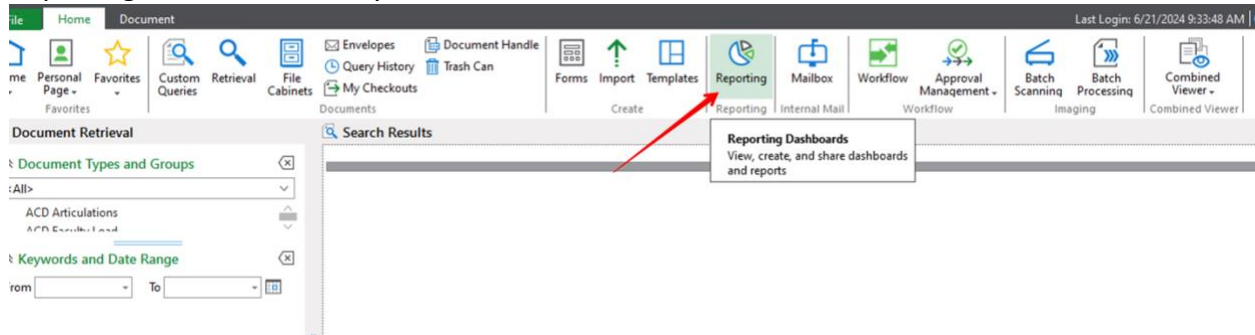OnBase Web Client - Reporting Dashboard Menu Navigation 1

OnBase Web Client - Reporting Dashboard Menu Navigation 2

2. Unity Client

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.

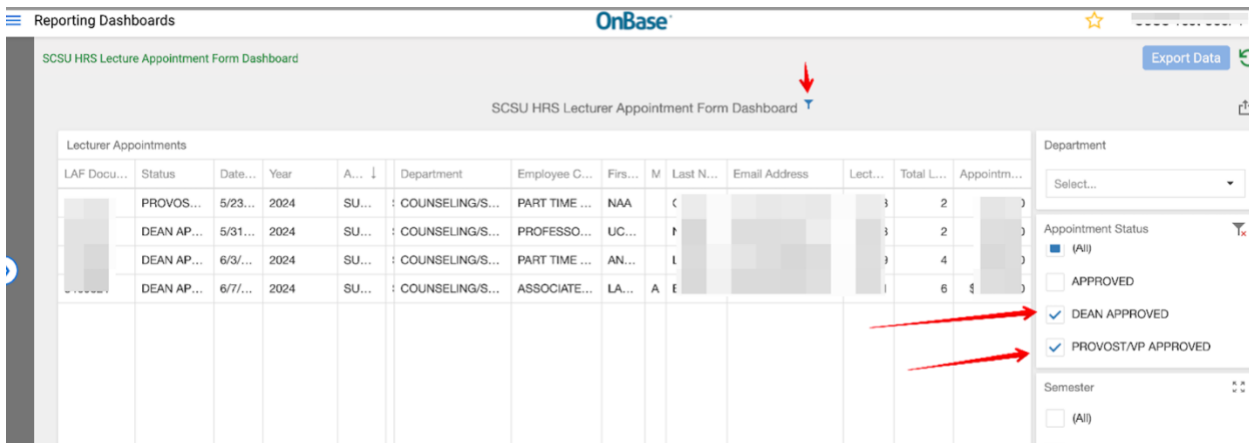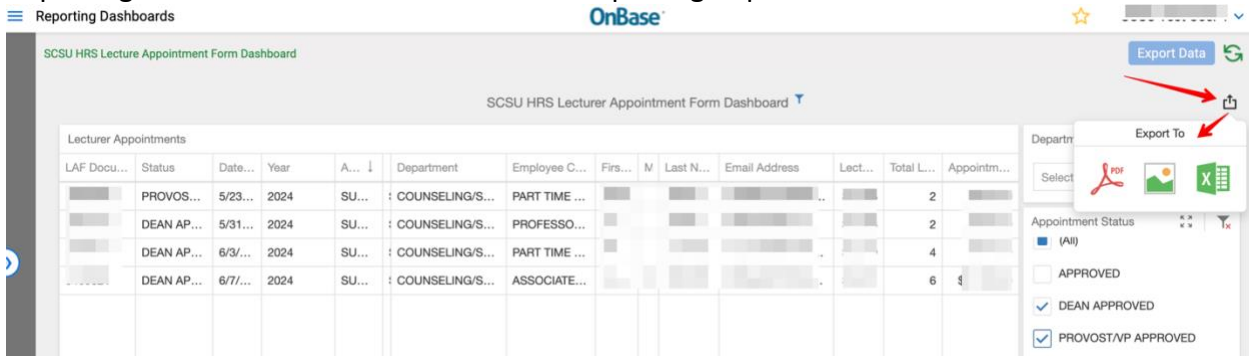OnBase Web Client - Reporting Dashboard – Column Header Sorting

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

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

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.