

OnBase: Dashboards

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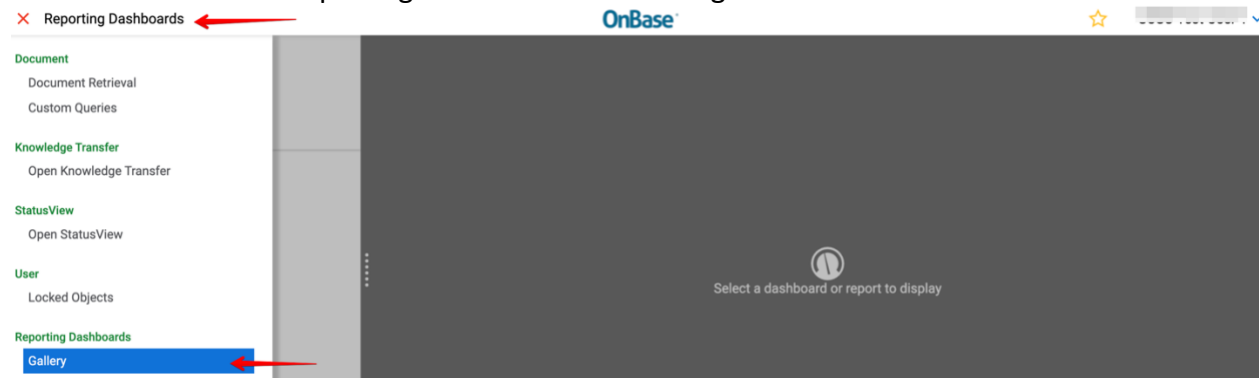
Introduction

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

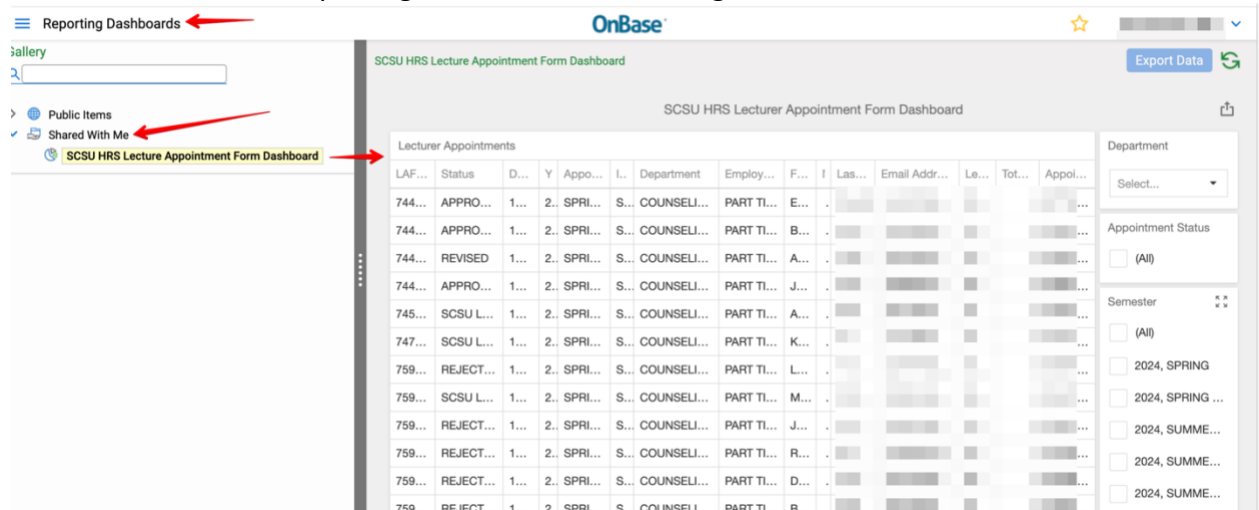
Navigating to dashboards

1. Web Client

OnBase Web Client - Reporting Dashboard Menu Navigation 1

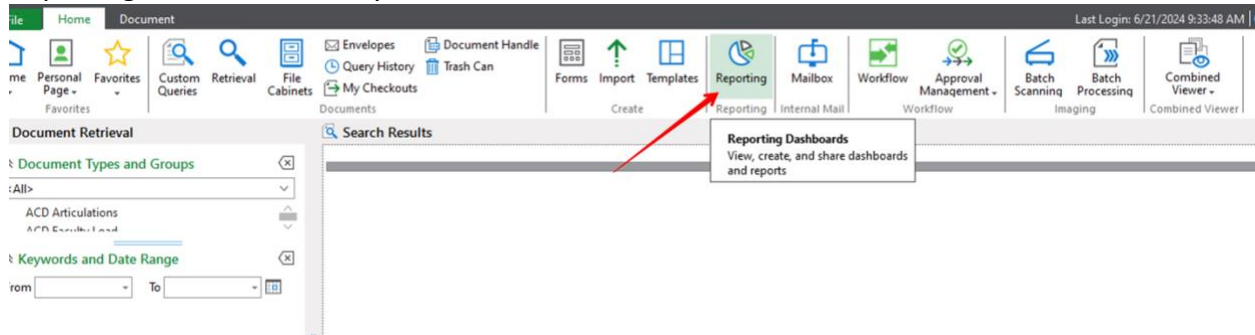


OnBase Web Client - Reporting Dashboard Menu Navigation 2



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

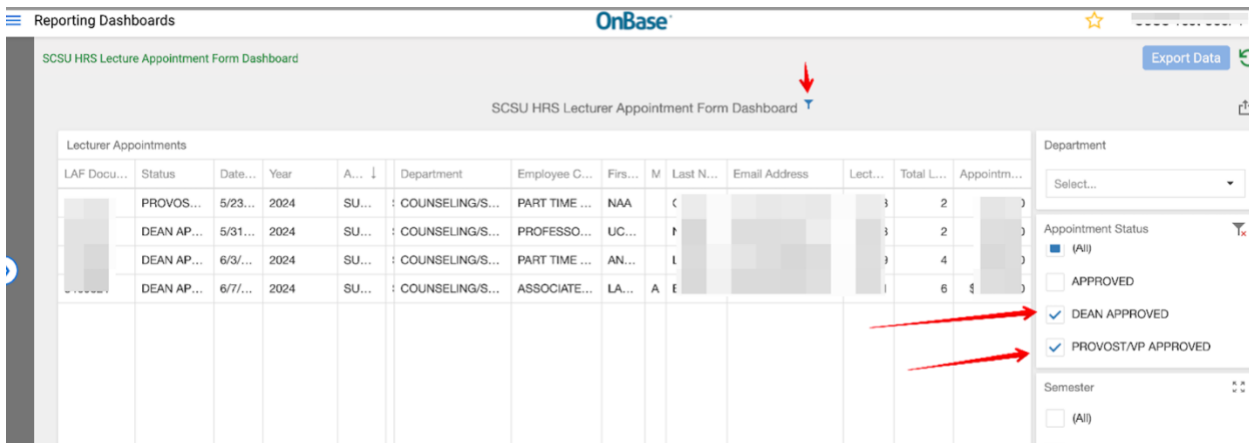
The screenshot shows the OnBase Web Client Reporting Dashboard. The main content is a table titled 'Lecturer Appointments'. The table has columns for 'LAF Doc...', 'Status', 'Date E...', 'Y...', 'Appointment Session', 'I...', 'Department', 'Employee Category', 'F.', 'MI', 'L.', 'Email A...', 'L...', 'Total Load (Sum)', and 'Ap...'. Red arrows point to the headers for 'Date E...', 'Appointment Session', and 'Employee Category', indicating that these columns can be sorted.

LAF Doc...	Status	Date E...	Y...	Appointment Session	I...	Department	Employee Category	F.	MI	L.	Email A...	L...	Total Load (Sum)	Ap...
	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...
	APPROVED	4/30/2...	2...	SUMMER B6	S...	COUNSELING/...	PROFESSOR (FT)	C...	S...			\$...	6	\$1...
	APPROVED	4/30/2...	2...	SUMMER B6	S...	COUNSELING/...	PROFESSOR (FT)	M...	M	G...		\$...	3	\$7...
	REJECTED	4/30/2...	2...	SUMMER B6	S...	COUNSELING/...	PROFESSOR (FT)	U...	N...			\$...	5	\$1...
	REJECTED	5/3/2024	2...	SUMMER B6	S...	COUNSELING/...	ASSOCIATE PROFESSOR (FT)	L...	A	B...		\$...	4.5	\$1...
	APPROVED	5/20/2...	2...	SUMMER B6	S...	COUNSELING/...	PROFESSOR (FT)	M...	M	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...		\$...	1.33	\$3...
	REJECTED	5/30/2...	2...	SUMMER B6	S...	COUNSELING/...	PART TIME LECTURER - A	A...	L...			\$...	3.75	\$7...
	DEAN APPROVED	5/31/2...	2...	SUMMER B6	S...	COUNSELING/...	PROFESSOR (FT)	U...	N...			\$...	2	\$5...

4. Filters

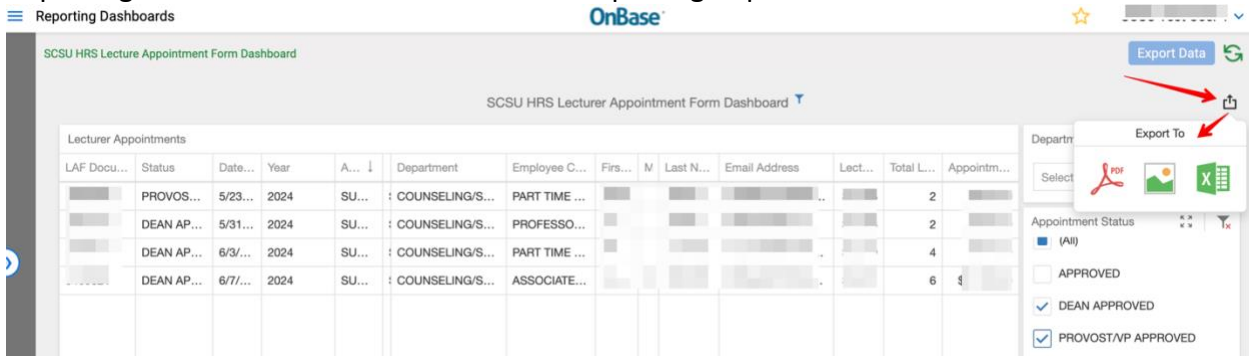
- a. Some dashboards have filters on the right side. Use check boxes to hide or show rows in the grid.

OnBase Web Client - Reporting Dashboard – Filtering



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.