ONBASE

REPORT MINING

SUMMARY

OnBase Report Mining allows organizations to easily analyze business performance trends. This enables effective sharing of information and the ability to gain valuable insight across the enterprise. From the OnBase Client, business users can visually create and generate their own reports, removing the reliance on IT staff. OnBase Report Mining automatically extracts data from OnBase text documents and aggregates the information for analysis in Microsoft Excel.

BENEFITS

- **Improves business intelligence and strategic decision-making** by providing access to historical document data.
- **Empowers business users to easily extract data required for analysis,** reducing the burden on costly IT resources.
- **Reduces time required for report creation and response to executive requests** from days to minutes.
- **Aggregates relevant and complete information** from text documents already stored in OnBase.
- **Increases employee productivity** by eliminating manual data gathering.

DESIGN

Using OnBase Report Mining, a Business Analyst working in OnBase is able to automatically aggregate data from within one or many documents stored in OnBase into a single Excel spreadsheet. By mapping content from the documents to columns in Excel, OnBase pulls data from documents in OnBase and output the data into one easy-to-read Excel spreadsheet. The business user then has all data available to apply pivot tables, macros, mathematical formulas and other Excel functionality to analyze the data.
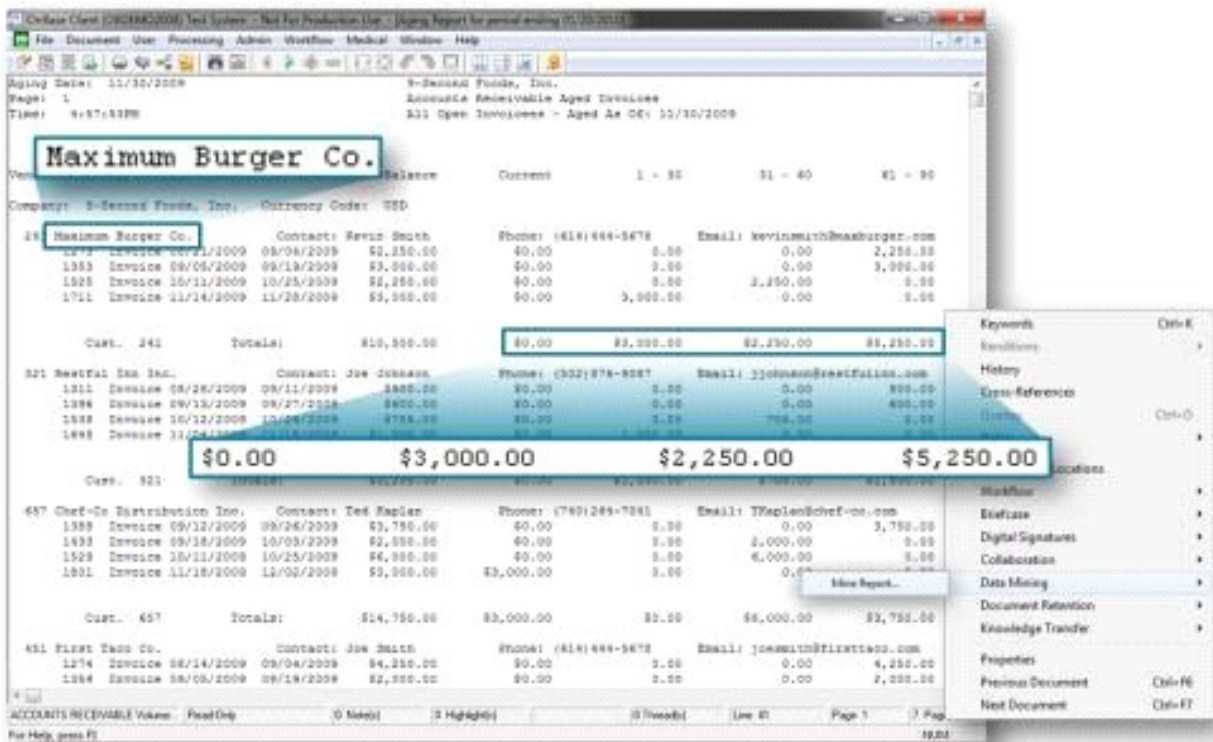
APPLICATIONS

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- **Accounts Receivable** – Organizations are managing the collection of receivables. Aging Reports show individual invoices due to an organization and the number of days these invoices are past due. These reports, processed into OnBase from legacy applications, total the amounts past due by customer so an organization can easily view the total receivables 30, 60, and 90 days past due. Report Mining can pull the totals from all of the different Aging Reports for a specific time period and output the data to Excel so an organization can analyze the receivables by product line, by geographic area, or other means of segmentation.
- **Inventory Management** – Inventory reports from legacy applications that show real-time inventory levels across an enterprise are stored in OnBase on a weekly basis. OnBase Report Mining can pull the totals for specific products over a five-year period to analyze the trending of low and high inventory levels to make more effective purchasing decisions.
- **Departmental Opportunities** – Departments have their own initiatives and the need for key data pulled from many documents. This could include sales and marketing reports such as analysis of sales by territory and sales representative or other reports to highlight sales opportunities by product line, market, or customer demographic.

KEY FEATURES

- **Extracts configured data and Keywords** from OnBase text documents to Excel spreadsheets.
- **Merges extracted data** from multiple documents and Document Types into one spreadsheet, combining common columns.
- **Visual Configuration** allows business users to configure and run their own reports from within the OnBase Client.
- **Replicates Page Data** appearing once on the source document (e.g. date) to each row in the extracted output.
- **Automatically archives Report Mining output** into OnBase as Excel spreadsheets, extending the useful reach of critical data across the enterprise.

INTERFACE

Mining Document in OnBase with Report Mining Output

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	A	B	C	D	E	F
1	Customer Name	Total Current	Total 1-30	Total 31-60	Total 61-90	
2	Maximum Burger Co.	$0.00	$3,000.00	$2,250.00	$5,250.00	
3	Restful Inn Inc.	$0.00	$1,000.00	$705.00	$1,500.00	
4	Chef-Co Distribution Inc.	$3,000.00	$0.00	$8,000.00	$3,750.00	
5	First Taco Co.	$0.00	$5,000.00	$1,250.00	$6,250.00	
6	Jumbo Burger Co.	$980.00	$1,000.00	$705.00	$1,800.00	
7	Steamboat Distribution Inc.	$2,000.00	$0.00	$6,000.00	$0.00	
8	Tim's Crabhouse	$2,000.00	$3,000.00	$2,250.00	$5,250.00	
9	AppleDay Inn Inc.	$980.00	$1,000.00	$905.00	$1,800.00	
10	ILIP Co.	$3,000.00	$0.00	$12,500.00	$3,750.00	
11	Brewster Co.	$0.00	$5,000.00	$0.00	$0.00	
12	Razzlers Co.	$800.00	$1,500.00	$705.00	$1,800.00	
13	Swarley, Inc.	$3,000.00	$0.00	$8,700.00	$4,750.00	
14	Green Cardinal	$980.00	$1,000.00	$1,005.00	$1,800.00	
15	Spikes, Inc.	$3,000.00	$0.00	$2,000.00	$0.00	
16	Lobster Grill Co.	$0.00	$6,000.00	$4,500.00	$0.00	

Users working in OnBase have the ability to access the "Data Mining" option from an open OnBase document or from the Document Retrieval results window. By selecting, "Mine Report", OnBase will pull the configured data from within the OnBase document and output he data to an Excel spreadsheet.

Learn more at **Community.Hyland.com**

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