

# ONBASE

## REPORT SERVICES

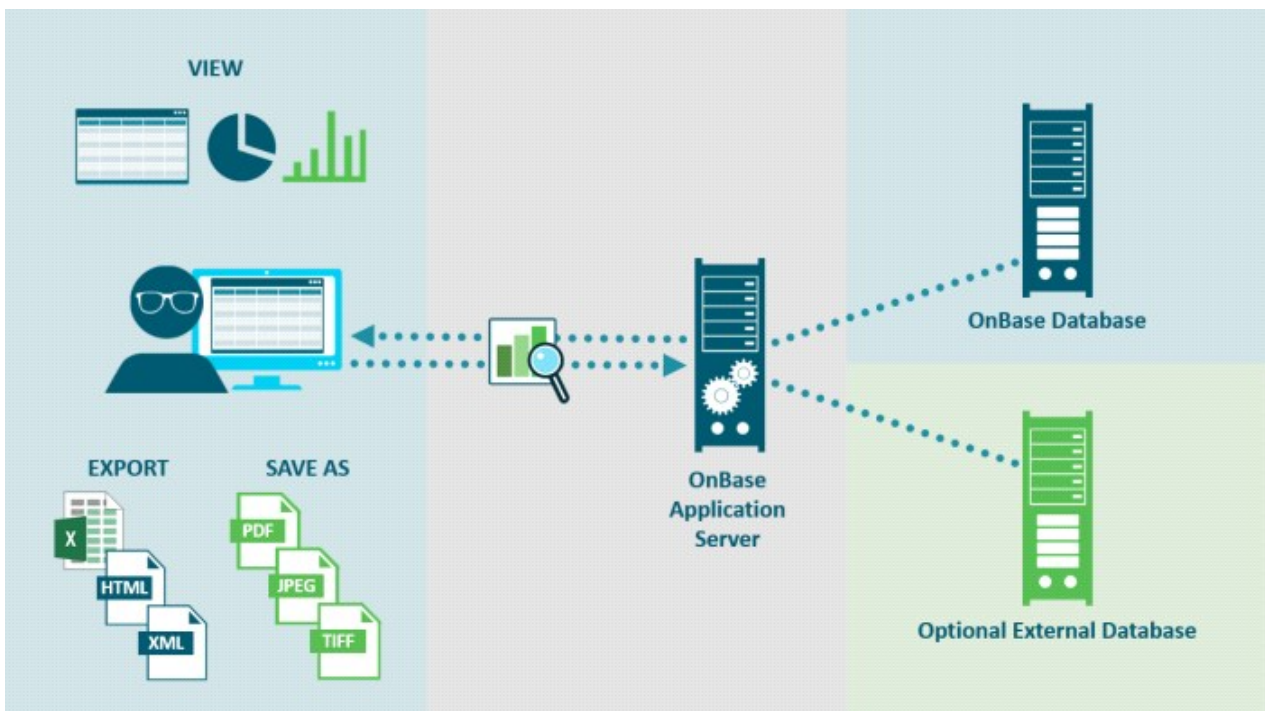
### SUMMARY

Report Services gives organizations the ability to gain valuable information about system and business health. Report Services is an easily deployed application that includes over 140 pre-configured reports for evaluating a complete picture of OnBase and the repositories and processes it manages. Organizations can also create their own custom reports to meet their specific business reporting needs. Long-term reporting functions enable businesses to analyze trends, share productivity information across the organization, and make proactive decisions based on solid data.

### BENEFITS

- **Optimized reporting** provides information on business activity and system health.
- **Business users can easily run reports** reducing the burden on costly IT resources.
- **Supports database security**, by not requiring users to have administrative database rights.
- **Flexible access**, allowing report generation from Report Services Client or Microsoft Excel.
- **Simple deployment and upgrades** are made possible using Microsoft ClickOnce technology.

### DESIGN



Using OnBase Report Services, a business user is able to generate business and system reports in real-time. Report Services is powered by the Application Server and connects to the OnBase Database via Core Services providing user authentication and report access control. Reports can also run against other business databases or a mirrored copy of the OnBase Database. The data is presented to the user in a variety of formats, including tables, bar charts, pie charts, etc. The reports can then be exported in XML, HTML or Excel formats or saved as PDF, JPEG or TIFF. Report Services is built on a Microsoft .NET platform and delivered using ClickOnce technology, which provides “no touch” deployment and centralized administration across both an enterprise intranet and the Internet.

## APPLICATIONS

- An **OnBase Administrator** can provide system information for budgeting and resource planning as OnBase system usage grows. Workflow reports provide key information on user productivity and can be used to determine Life Cycle process times or identify process bottlenecks. These reports can be generated and viewed as tables, pie charts or bar charts, based on the users report presentation preference.
- A **Department Manager** can self-serve and generate reports directly from Microsoft Excel as needed, without submitting report requests to the IT department. The OnBase Administrator can be confident that sensitive information is protected; as users don't have direct access to the OnBase Database and report permission is controlled by OnBase User Group security.

## KEY FEATURES

- **Over 140 pre-configured reports** are available within Report Services.
- **Microsoft Excel Add-In** allows users to generate reports from within the Excel interface.
- **Export dynamic report data to other applications** like Microsoft Excel for further processing and evaluation.
- **Report access is controlled by OnBase User Group rights and privileges**, consistent with OnBase security.
- **Query Analyzer** aids administrators in creating new reports for use with Report Services.

## INTERFACE

The screenshot displays the Report Services client interface. On the left, there is a sidebar with 'Report Groups' (Workflow Reports, Reports) and 'Report Parameters' (From Date: Sunday, August 1, 2010; To Date: Tuesday, August 22, 2017; Life Cycle: <<ALL>>; Queue: <<ALL>>). The main area shows a table of report data with columns: Life Cycle, Queue Name, User Name, Items Processed, Minimum (Minutes), and Maxir. A 'Report Details' pop-up window is open, showing report information (ID: WF095, Name: Queue Processing Time per User in Minutes, Reporting Database: OnBase, Execution Time: 8/22/2017 2:38:12 PM) and report parameters (From Date: 8/1/2010, To Date: 8/22/2017, Life Cycle: <<ALL>>, Queue: <<ALL>>).

Life Cycle	Queue Name	User Name	Items Processed	Minimum (Minutes)	Maxir
AP - Invoice Processing	Evaluation	AP	43	0	
AP - Invoice Processing	Evaluation	FRANK MOORE	1	0	
AP - Invoice Processing	Evaluation	MANAGER	209	0	
AP - Invoice Processing	Initial	AP	35	0	
AP - Invoice Processing	Initial	FRANK MOORE	1	0	
AP - Invoice Processing	Initial	MANAGER	217	0	
AP - Invoice Processing	Invoice Approval	AP	6	0	
AP - Invoice Processing	Invoice Approval	MANAGER	2	0	
AP - Invoice Processing	Invoice Exceptions	AP	30	0	
AP - Invoice Processing	Invoice Exceptions	MANAGER	22	0	
AP - Invoice Processing	Invoice Review (GL Coding)	AP	29	0	
AP - Invoice Processing	Invoice Review (GL Coding)	FRANK MOORE	1	0	
AP - Invoice Processing	Invoice Review (GL Coding)	MANAGER	18	2	
AP - Invoice Processing	Multiple Approvers	AP	2	4	
AP - Invoice Processing	Multiple Approvers	BOB THOMAS	1	8	
AP - Invoice Processing	Multiple Approvers	FRANK MOORE	1	3	
AP - Invoice Processing	Multiple Approvers	INGRID...	1	6	
AP - Invoice Processing	Multiple Approvers	MANA			
AP - Invoice Processing	Pending Post to ERP	AP			
AP - Invoice Processing	Pending Post to ERP	MANA			
AP - Invoice Processing	Rejected	AP			
AP - Invoice Processing	Rejected	MANA			
AP - Invoice Processing	Review	AP			
AP - Invoice Processing	Sent to ERP	AP			
AP - Invoice Processing	Sent to ERP	MANA			
APP1 - Job Applicant Screening	JAS - Hiring Manager Review	HR			
APP1 - Job Applicant Screening	JAS - HR Review (LB)	HR			
APP1 - Job Applicant Screening	JAS - HR Review (LB)	MANA			
APP2 - Job Applicant Interviewing	JAI - HR Schedule Interview	HR			
APP2 - Job Applicant Interviewing	JAI - Manager Interview Candidate	HR			
APP3 - Offer Letter	OL - Approved	HR			
APP3 - Offer Letter	OL - Finance Review	HR			

Queue Processing Time – Report Services Client

The screenshot displays an Excel spreadsheet titled 'Book1 - Excel' with a table named 'Life Cycle'. The table has the following columns: Queue Name, User Name, Items Processed, Minimum(Minutes), and Maximum(Minutes). The data rows show various invoice processing steps and users. A 'Reports' sidebar is open on the right, showing a report configuration for 'Queue Processing Time per User in Minutes'. The report parameters include 'From Date' (8/1/2010) and 'To Date' (8/22/2017). A 'Run Report' button is visible at the bottom of the sidebar.

Life Cycle	Queue Name	User Name	Items Processed	Minimum(Minutes)	Maximum(Minutes)
AP - Invoice Processing	Evaluation	AP	43	0	26
AP - Invoice Processing	Evaluation	FRANK MOORE	1	0	0
AP - Invoice Processing	Evaluation	MANAGER	209	0	0
AP - Invoice Processing	Initial	AP	35	0	0
AP - Invoice Processing	Initial	FRANK MOORE	1	0	0
AP - Invoice Processing	Initial	MANAGER	217	0	0
AP - Invoice Processing	Invoice Approval	AP	6	0	4323
AP - Invoice Processing	Invoice Approval	MANAGER	2	0	222043
AP - Invoice Processing	Invoice Exceptions	AP	30	0	230339
AP - Invoice Processing	Invoice Exceptions	MANAGER	22	0	7032
AP - Invoice Processing	Invoice Review (GL Coding)	AP	29	0	230336
AP - Invoice Processing	Invoice Review (GL Coding)	FRANK MOORE	1	0	0
AP - Invoice Processing	Invoice Review (GL Coding)	MANAGER	18	2	1739
AP - Invoice Processing	Multiple Approvers	AP	2	4	21
AP - Invoice Processing	Multiple Approvers	BOB THOMAS	1	8	8
AP - Invoice Processing	Multiple Approvers	FRANK MOORE	1	3	3
AP - Invoice Processing	Multiple Approvers	INGRID THOMAS	1	6	6
AP - Invoice Processing	Multiple Approvers	MANAGER	3	109	182
AP - Invoice Processing	Pending Post to ERP	AP	58	0	230336
AP - Invoice Processing	Pending Post to ERP	MANAGER	25	0	184
AP - Invoice Processing	Rejected	AP	6	1	3
AP - Invoice Processing	Rejected	MANAGER	4	0	2

Queue Processing Time – Report Services Excel Add-In

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