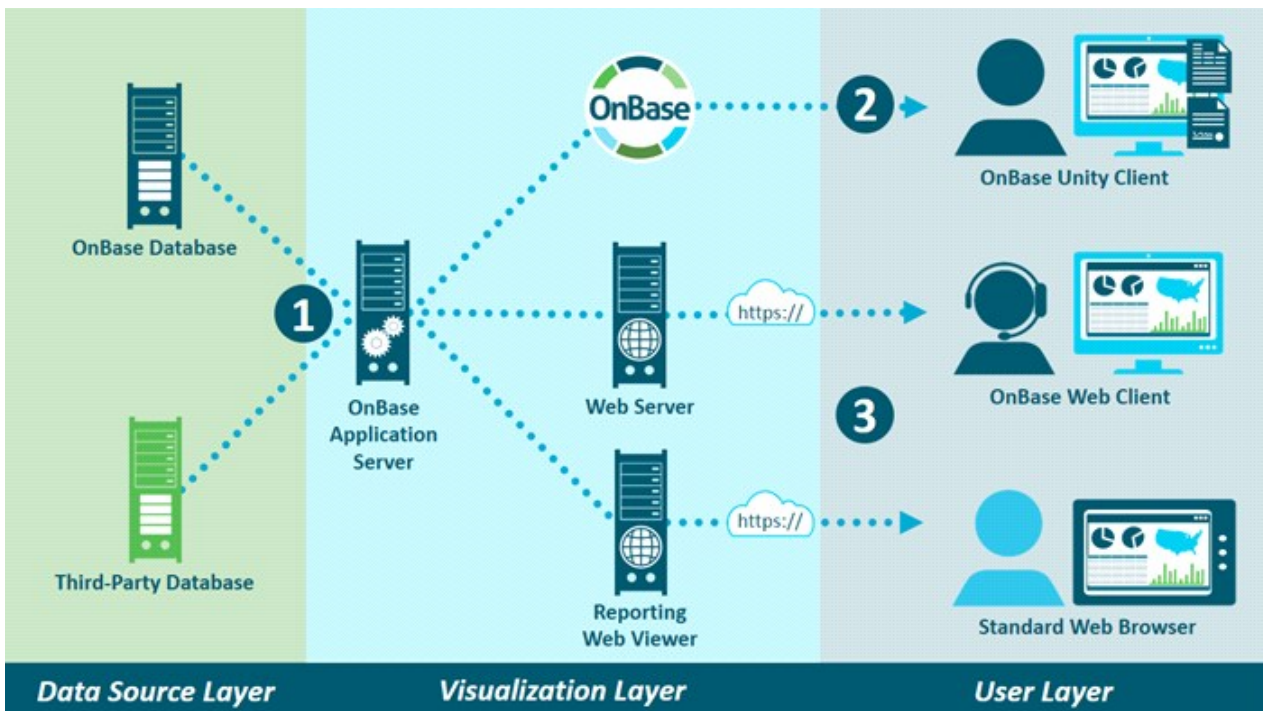# ONBASE

REPORTING DASHBOARDS

SUMMARY

Reporting Dashboards gives organizations immediate visibility into system and business health. Users can create and share dashboards—highlighting business data most important to them—without the need to engage IT resources. Dashboards present data in a variety of graphical formats including charts, graphs, scorecards, gauges, maps and more. Interactive features then allow users to easily monitor performance and analyze trends in real-time. Dashboards can be accessed from the Unity and Web Clients, in addition to standard web browsers, including mobile browsers, providing greater accessibility. Quickly view and interpret relevant data and make proactive business decisions with Reporting Dashboards.

BENEFITS

- **Provide users with a self-service reporting tool** while continuing to respect database security policies
- **Make complex data easier to understand** by providing a graphical view of business activity and system health
- **Minimize delays in decision-making** by presenting relevant data for analysis in real-time
- **Promote process improvement** by highlighting trends and potential bottlenecks
- **Reduce IT costs** by allowing business users to create their own views of process and performance data

DESIGN

Reporting Dashboards aggregates valuable business information from OnBase as well as third-party data sources (1) for complete visibility and analysis. Dashboards are point-and-click configured to utilize this raw data and display it in a variety of ways, including charts, graphs, maps and more. Users can view and interact with these dashboards, using filtering and drill-down functionality to create the exact view into the data they need to make critical decisions. From the Unity Client, data can even be directly related to OnBase content (2) to provide greater context when making business decisions. Dashboards are also accessible from the Web Client and even any standard web browser (3) by leveraging the Reporting Web Viewer.
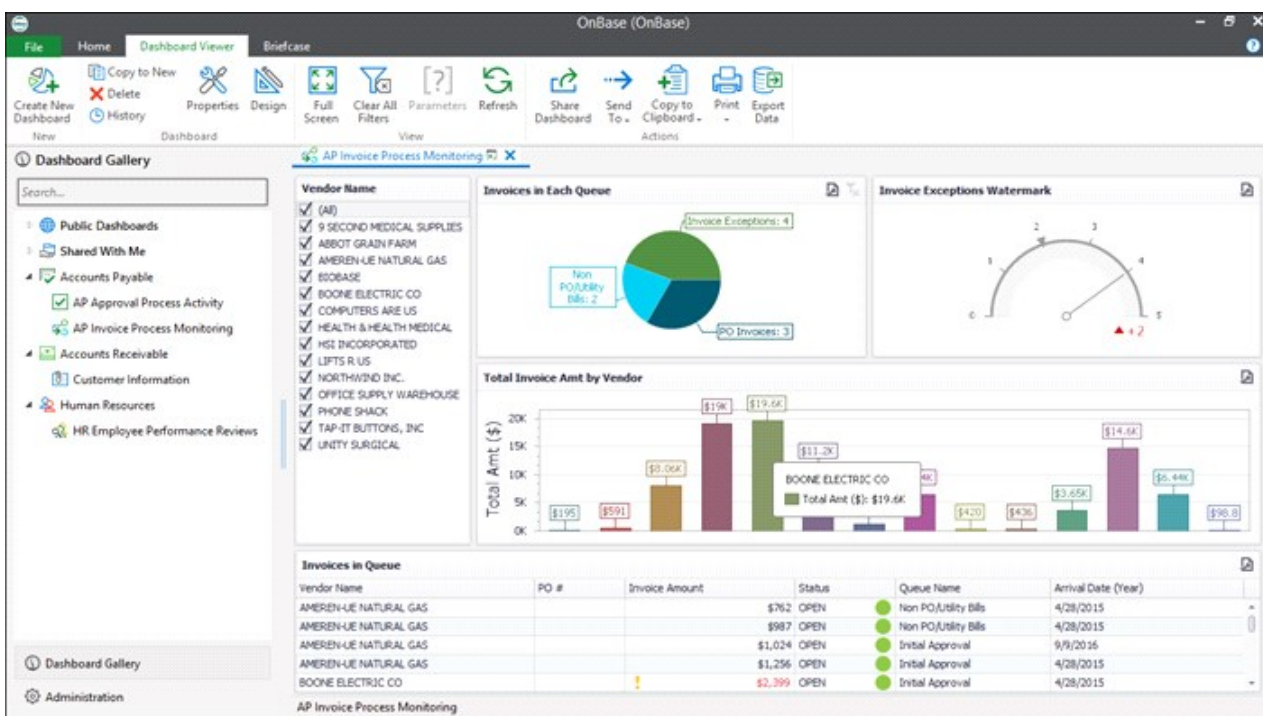
Hyland®

APPLICATIONS

- **Business Users** – Business users can design their own dashboards to display personally relevant data in real-time. Sales managers, process owners and executives require detailed and dynamic views of their business data. Through an interactive, graphical display, they can easily filter through data to identify meaningful information. Business processes can be monitored for bottlenecks and delays, improving performance and ensuring that work is completed on time. Dashboards can be shared among teams, departments or the entire enterprise, displaying metrics and thresholds to promote continuous improvement.
- **Administrators** – Administrators can create dashboards to monitor system health and license usage, granting visibility and providing analytics to support planning for additional hardware or staffing. Granular security and permissions protect sensitive data and documents as well as allow admins to control how certain users interact with dashboards.
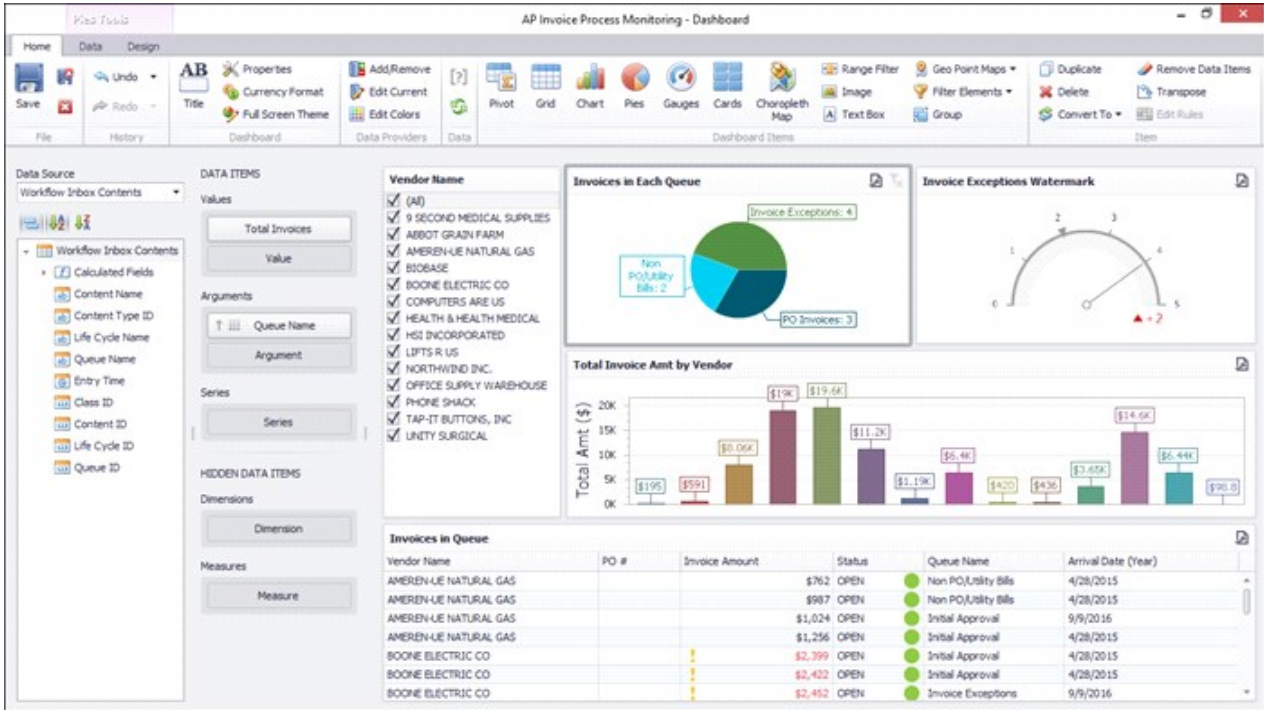
KEY FEATURES

- **Point-and-click Dashboard Designer** allows business users to create their own dashboards without any coding
- **Share dashboards** with other OnBase users while controlling access permissions
- **Interactive dashboard items** allow users to dynamically update, filter and drill down into specific business data
- **Display Actions** allow users to open related documents, Workflow Queues, WorkView Objects, and Folders by simply clicking on relevant data
- **Reporting Web Viewer** provides access to dashboards from web browsers, including mobile, extending them beyond the Unity and Web Clients
- **Data Provider Wizards** provide step-by-step assistance for creating new data sources for dashboards; additional data providers can be created using custom SQL
- **Schedule Data Provider execution** by utilizing Unity Scheduler
- **Granular security and permissions** protect sensitive data and content as well as control how users interact with dashboards
- **Export dashboard data to Excel** for further processing and evaluation
- **Upload dashboards directly into OnBase** as an image file for archival purposes

INTERFACE

Dashboards present timely and personalized business data using charts, graphs, scorecards, maps and more.

Hyland®

Dashboards are created using a point-and-click design tool.

Hyland®