

## SUMMARY

OnBase 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 90 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.

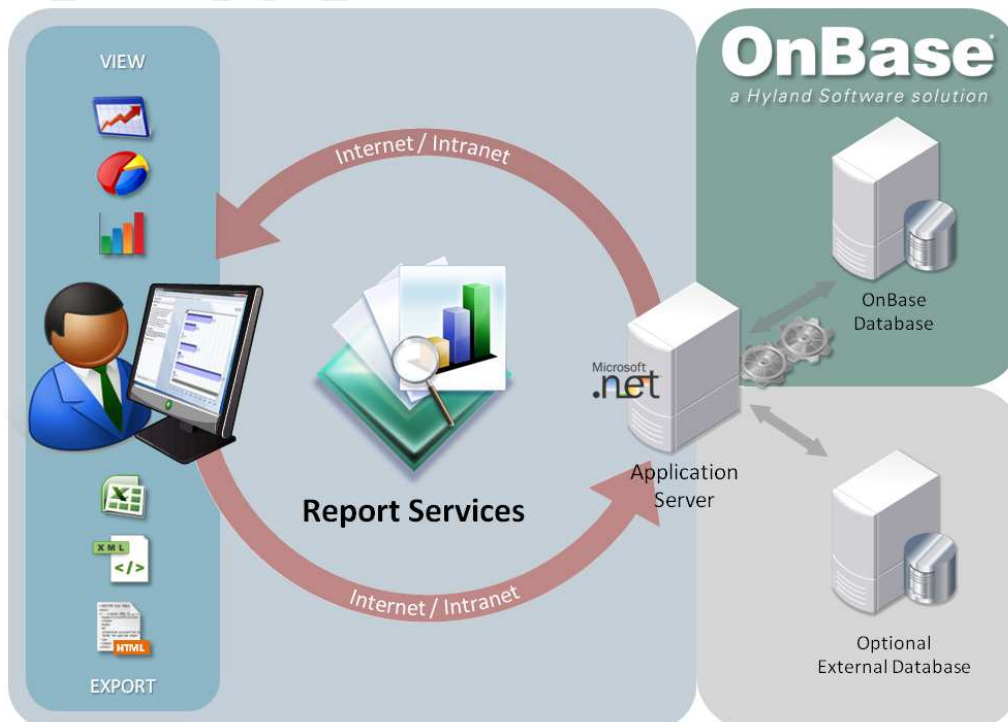
## KEY BENEFITS

- **Optimized reporting** provides information on business activity and system health.
- **Business users can easily run reports** reducing the burden on costly IT resources.
- **Controlled report generation** with user-based report security.
- **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.

## BUSINESS APPLICATION

- **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.

## 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.

## KEY FEATURES

- Over 90 pre-configured reports are available within Report Services.
- Microsoft Excel Add-In allows users to generate reports from within the Excel interface.
- Optimized standard report queries ensure minimal impact on database performance.
- Newly created reports can be imported and are available for quick installation and use.
- 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

### Queue Processing Time – Report Services Client

Queue Name	User Name	Documents Processed
AR - Invoice Payment Processing Queue	MANAGER	205
AR - Past Due Invoices (1-30 days)	ADMINISTRATOR	15
HR - Review Timer Queue	MANAGER	53
AR - Disputed Invoices	ADMINISTRATOR	2
AP - Pay Results (Partial Pay)	ADMINISTRATOR	2
AP - Invoice Entry Queue	MANAGER	185
AP - Non PO/Utility Bills	MANAGER	16
AR - Disputed Invoices	MANAGER	10
AP - Purchasing Agent	MANAGER	6
AP - Pay Results (Paid)	ADMINISTRATOR	2
AR - Past Due Invoices (61-90 days)	ADMINISTRATOR	24
AP - Pay Results (Denied)	ADMINISTRATOR	2
HR - From Review Timer Life Cycle	MANAGER	69
AR - Called Queue	ADMINISTRATOR	1
AR - Invoice Exceptions	ADMINISTRATOR	11
AR - Called Queue	MANAGER	18
AR - Past Due Invoices (1-30 days)	MANAGER	11
HR - Employee Comments (Load Balanced)	MANAGER	1
AR - Past Due Invoices (31-60 days)	ADMINISTRATOR	20
AP - Payment Entry (Load Balanced)	ADMINISTRATOR	37
AP - Auto Document Matching	MANAGER	163
AR - Completed Payments	ADMINISTRATOR	44
AR - Past Due Invoices (61-90 days)	MANAGER	45
AP - Purchasing Agent	ADMINISTRATOR	3
AR - Current Invoices	ADMINISTRATOR	81
AR - Past Due Invoices (31-60 days)	MANAGER	30
AR - Completed Payments	MANAGER	2
HR - Manager Review (Load Balanced)	MANAGER	4
HR - Reviews In Progress	MANAGER	42
AR - Current Invoices	MANAGER	118
AR - Invoice Payment Processing Queue	ADMINISTRATOR	53
AP - Invoice Exceptions	MANAGER	54
AP - Non PO/Utility Bills	ADMINISTRATOR	24
AR - Invoice Entry Queue	ADMINISTRATOR	197

### Queue Processing Time – Report Services Excel Add-In

Queue Name	User Name	Documents Processed	Minimum (Minutes)
AR - Invoice Payment Processing Queue	MANAGER	205	0
AR - Past Due Invoices (1-30 days)	ADMINISTRATOR	15	1
HR - Review Timer Queue	MANAGER	53	0
AR - Disputed Invoices	ADMINISTRATOR	2	2
AP - Pay Results (Partial Pay)	ADMINISTRATOR	2	119
AP - Invoice Entry Queue	MANAGER	185	2
AP - Non PO/Utility Bills	MANAGER	16	1
AR - Disputed Invoices	MANAGER	10	0
AP - Purchasing Agent	MANAGER	6	0
AP - Pay Results (Paid)	ADMINISTRATOR	2	1123
AR - Past Due Invoices (61-90 days)	ADMINISTRATOR	24	1
AP - Pay Results (Denied)	ADMINISTRATOR	2	119
HR - From Review Timer Life Cycle	MANAGER	69	0
AR - Called Queue	ADMINISTRATOR	1	3
AR - Invoice Exceptions	ADMINISTRATOR	11	2
AR - Called Queue	MANAGER	18	0
AR - Past Due Invoices (1-30 days)	MANAGER	11	0
HR - Employee Comments (Load Balanced)	MANAGER	1	1
AR - Past Due Invoices (31-60 days)	ADMINISTRATOR	20	1
AP - Payment Entry (Load Balanced)	ADMINISTRATOR	37	2
AP - Auto Document Matching	MANAGER	163	4
AR - Completed Payments	ADMINISTRATOR	44	4
AR - Past Due Invoices (61-90 days)	MANAGER	45	0
AP - Purchasing Agent	ADMINISTRATOR	3	68
AR - Current Invoices	ADMINISTRATOR	81	0
AR - Past Due Invoices (31-60 days)	MANAGER	30	0

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