Naviant Reporting Dashboards Bundle

There are currently 84 dashboards in the bundle. (Database Index Statistics is only available for SQL Server.)

Reports by Report Group

Administration

- Active Locks
- Cleanup Items
- Database Index Statistics (SQL Server Only)
- Doc Migration Identification
- Doc Migration Identification Page Count
- Docs not in Default Disk Groups
- Email Distribution History
- Unity Scheduler Tasks

Auditing

- Admin Activity by User
- Cache Resets
- Config Activity by User
- Doc Actions**
- Doc Counts by Doc Type
- Doc Counts by File Type
- Doc Exports**
- Doc Types Never Viewed
- Doc Types Viewed
- Envelope Metrics
- Folder Actions**
- Keyword Actions**
- Note Actions**

**Performance improved by the custom index

Configuration

- Advanced Capture Forms
- Autofill Keyword Sets
- Cross-Referenced Document Types
- Disk Group Volume Summary
- Doc Composition Templates
- Doc Type Keyword Config
- Doc Type Settings
- File Format Config
- Icons and Bitmaps in Use
- Keyword Data Sets
- Keyword Type Groups
- Personal Page Tiles
- Print Format Config
- WorkView Config

Document Knowledge Transfer

- Reading Group Admin View - All Revisions

Document Processing

- Average Doc Size by Doc Type
- Batch Administration
- Monthly Ingested Docs by Method
- Monthly Scanned Docs
- Monthly Scanned Pages
- Scanned Batch Metrics

Document Retention / Records Management

- Doc Retention
- Records Mgmt Docs Awaiting Approval

IDOL / FTS

- IDOL Pending Processing
- FTS Processing

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- Peak License Usage by Hour
- Registered Products by User and Workstation

Reporting Dashboards

- Reporting Dashboards Access
- Reporting Dashboards Overview

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- AD Group Mappings
- Security Overrides
- User Account Settings
- User Accounts
- User Group Logins
- User Group Membership
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- User Group Rights – Logs and Config
- User Group Rights – Privileges
- User Group Rights – Product Rights
- User Group Rights – Workflow
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- User Rights – General
- User Rights – Logs and Config
- User Rights – Privileges
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- User Rights – Workflow
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Unity Forms

- Unity Forms
- Unity Forms Custom Actions

Workflow

- Workflow Admin Processing Privileges
- Workflow Configured Logging
- Workflow Items Passed Through Queues
- Workflow Legacy Timers
- Workflow Load Balance Methods
- Workflow Notifications
- Workflow Process Time per Queue in Hours
- Workflow Properties
- Workflow Queue Counts
- Workflow Queue Settings
- Workflow Queue Watermark Settings
- Workflow Transaction Logs
- WorkView Notifications

Report Descriptions

Active Locks
Lists active document, process, and batch locks.

AD Group Mappings
Displays the list of OnBase user groups and the Active Directory groups mapped to them.

Admin Activity by User
Displays administrative actions performed by users for a given date range.

Advanced Capture Forms
Displays the list of advanced capture forms configured and some of their settings.

Autofill Keyword Sets
Autofill Keyword Set configuration settings.

Average Doc Size by Doc Type
Displays average document size by document type for a given date range.

Batch Administration
Lists Scan/Index, COLD, DIP, and EDI batches in Incomplete Process, Awaiting Commit, Incomplete Commit, and Incomplete Purge status.

Cache Resets
Identifies who, when, and where a cache reset was performed.

Cleanup Items
Lists documents with out of bounds dates, user groups with no users assigned, and active user accounts with no user groups assigned that are candidates for cleanup.

Config Activity by User
Displays configuration changes made by users for a given date range.

Cross-Referenced Doc Types
Displays the basic settings for all cross-referenced document types.

Database Index Statistics
Executes the Index Statistics section of the DBToolkit application and displays the last time statistics were updated on each table.

Disk Group Volume Summary
Identifies the current volume number for each mass storage copy, how many volumes are currently online and the maximum allowed online by disk group. A Max Volumes Online value of zero means the disk group copy is set for infinite volumes.

Doc Actions
Displays the number of documents added, modified, deleted, and viewed by user and document type for a given date range.

Doc Composition Templates
Lists Document Composition Template User Group settings and Template Options.

Doc Counts by Doc Type
Shows the number of documents in the system by document type.

Doc Counts by File Type
Reports on the number of documents in the system by file type.

Doc Exports
Displays the number of documents exported, mailed, and printed by user and document type for a given date range.

Doc Migration Identification
Lists the documents in a specified disk group, whether they are still active in the system or awaiting purge. This report is meant to identify documents in need of migration to a different disk group.

Doc Migration Identification Page Count
Counts the number of pages in each disk group by document type. The report is meant to assist with identifying documents in need of migration to a different disk group.

Doc Retention
Lists Document Retention settings for Document Types and documents that have been excluded from retention plans and are not purged.

Doc Type Keyword Config
Displays the keyword configuration details for each document type.

Doc Type Settings
Displays some of the more common document type configuration settings.

Doc Types Never Viewed
Lists the number of documents in the system that have never been viewed by document type.

Doc Types Viewed
Lists the number of views on documents by document type for a given date range with an option to filter by user.

Docs not in Default Disk Groups
Displays the list of documents that are being stored in a disk group other than the default one defined for the document type.

Email Distribution History
Displays emails pending and emails sent within a given date range.

Envelope Metrics
Lists documents and sharing permissions for envelopes.

File Format Config
Displays the file format settings for all file types.

Folder Actions
Displays the number of folders added, deleted, and viewed by user and folder type for a given date range.

FTS Processing
Displays the statuses of documents in FTS processing and lists the documents that failed.

Icons and Bitmaps in Use
Displays the list of all objects that have an icon or bitmap configured, even if the image has since been purge from OnBase. If the image has been purged, the itemname will be NULL and the number to its left will be greater than 0.

IDOL Pending Processing
Displays the list of documents in the IDOL processing queue.

Keyword Actions
Displays the number of keywords added, deleted, modified (via re-index or changing the document date), and viewed by user and document type for a given date range.

Keyword Data Sets
Lists keyword types configured with data sets.

Keyword Type Groups
Keyword Type Group configuration settings.

Monthly Ingested Docs by Method
Number of documents brought into OnBase via ad hoc import, scan/sweep, COLD, or DIP for a given date range.

Monthly Scanned Docs
Monthly summary of the total number of documents scanned within a specified date range. The report reflects the total number of documents scanned, regardless of whether the documents are still active within the system.

Monthly Scanned Pages
Monthly summary of the total number pages scanned within a specified date range. The report reflects the total number of pages scanned, regardless of whether the pages are still active within the system.

Note Actions
Displays the number of notes added, modified, deleted, and viewed by user and note type for a given date range.

Peak License Usage by Hour*
Maximum number of licenses consumed during the specified reporting period for each tracked license type. This information can be used to evaluate if additional licenses may need to be purchased.
*Config | Utils | Core-Based Settings | Log License Usage must be enabled for this report.

Personal Page Tiles
Displays the list of tiles assigned to users and user groups.

Print Format Configuration
Displays most of the settings for all print formats. Default paper source / size and barcode settings are excluded.

Reading Group Admin View - All Revisions
Document Knowledge Transfer history for each user in a reading group for all revisions, even if the user is only able to view the current revision.

Records Mgmt Docs Awaiting Approval
Lists the documents awaiting approval to be purged or destroyed.

Registered Products by User and Workstation
Lists all registered products by the user or workstation assignment by product type. This can be useful for auditing license assignment as well as locating unused or orphaned licenses from expired workstations.

Reporting Dashboards Access
Displays access rights for reporting dashboards.

Reporting Dashboards Overview
Displays the list of reporting dashboards and data providers assigned.

Scanned Batch Metrics
Displays scanned batch metrics by user for a given date/time range.

Security Overrides
Displays security keywords and indexing limits assigned to user groups or directly to user accounts, security keywords applied to users from user group membership, and document types with override privileges assigned to user groups.

Unity Forms
Lists basic information about configured Unity forms and Unity form data sets.

Unity Forms Custom Actions
Lists Unity form custom actions configured.

Unity Scheduler Tasks
Displays details about tasks configured in Unity Scheduler.

User Account Settings
Displays optional settings for user account.

User Accounts
Lists basic user account metrics (user name, real name, email address, locked/unlocked, last logon, last password change) for all active user accounts.

User Group Logins
Displays which user groups logged into which client types within a given date range.

User Group Membership
Displays the list of users and the user groups to which they belong.

User Group Rights - General
Lists some of the basic items access of the selected User Group.

User Group Rights – Logs and Config
Lists the log privileges and configuration rights of the selected User Group.

User Group Rights - Privileges
Lists the privileges access of the selected User Group.

User Group Rights – Product Rights
Lists the product rights access of the selected User Group.

User Group Rights - Workflow
Lists the workflow access of the selected User Group.

User Logins by Workstation and Date
Displays which user accounts logged into which workstations within a given date range.

User Rights - General
Lists some of the combined basic items access of the selected OnBase User for all user groups of which the User is a member.

User Rights – Logs and Config
Lists the combined log privileges and configuration rights of the selected OnBase User for all user groups of which the User is a member.

User Rights - Privileges
Lists the combined privileges access of the selected OnBase User for all user groups of which the User is a member.

User Rights – Product Rights
Lists the combined product rights access of the selected OnBase User for all user groups of which the User is a member.

User Rights - Workflow
Lists the combined workflow access of the selected OnBase User for all user groups of which the User is a member.

Workflow Admin Processing Privileges
Displays the users and user groups with Workflow Administrative Processing Privileges.

Workflow Configured Logging
Displays Workflow actions, rules, task lists, true/false conditions, timers, and custom log entries configured to log to the wftransactionlog table.

Workflow Items Passed Through Queues
Displays the number of work items that entered and exited life cycle queues within a given date/time range.

Workflow Legacy Timers
Displays the list of legacy timers configured for Workflow and where they are assigned.

Workflow Life Cycle Rights
Displays the list of Workflow queues and their load balance methods.

Workflow Load Balance Methods
Displays the user groups with access to the queues and ad hoc tasks of a given life cycle.

Workflow Notifications
Displays the list of recipients configured for Workflow Notifications and where they are assigned in Workflow. Does not include WorkView notifications.

Workflow Process Time per Queue in Hours
Describes minimum, maximum, and average time that documents reside in a workflow queue (Processing Time). Processing calculations are based upon the queue entry and exit times of a document.

Workflow Properties
Displays the list of properties configured in Workflow in each life cycle.

Workflow Queue Counts
Displays a count of the number of documents in each queue by document type, whether they are active or deleted, and the oldest entry date.

Workflow Queue Settings
Displays most of the Workflow queue level general, advanced, and filter settings.

Workflow Queue Watermark Settings
Displays Workflow queue level watermark settings.

Workflow Transaction Logs
Returns the number of workflow log entries for each configured item across all life cycles in a given date range.

WorkView Config
Displays application, class, attribute, and data type WorkView configuration information.

WorkView Notifications
Displays the list of WorkView Notifications configured and where they are assigned in Workflow.

WorkView Security
Lists User Groups assigned to WorkView configuration items.