

MIGRATING FROM REPORT SERVICES TO REPORTING DASHBOARDS

Hyland Report Services has an End of Life date of 12/31/19. OnBase Foundation EP3 is expected to be released without Report Services. RPI Consultants share information regarding moving your Report Services reports to Reporting Dashboards.

Wednesday, March 4, 2020

Presenters: Cailen Myers

+ **Epic Integration Upgrades**

- March 18th, 1:00pm CT

+ **OnBase Forms Solutions**

- April 1st, 1:00pm CT

+ **OnBase for HR**

- April 15th, 1:00pm CT

+ **OnBase Case Studies & Success Stories**

- April 29th, 1:00pm CT

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Cailen Myers

Senior OnBase Consultant

- + 10+ years of experience designing, implementing and supporting OnBase
- + Specialized in Healthcare and EMR/ERP Integration
- + Certifications include: OnBase System Admin, OnBase Advance System Admin, OnBase Workflow Admin, OnBase Advance Workflow Admin, OnBase Support Engineer, EPIC Deficiency Tracking, EPIC Identity, EPIC Release of Information
- + Mom to 3 Siberian Huskies, loves baking and scrapbooking



- + **Frequently Asked Questions**
- + **What is Reporting Dashboards**
- + **Migrating Reports with Conversion Tool**
- + **Migrating Reports without Conversion Tool**
- + **Summary & Questions**



Authorized Solution Provider

The background of the slide is a photograph of a modern office interior, featuring desks, computers, and people working. The entire image is covered with a semi-transparent blue overlay. On the right side of the background, the text 'api consultants' is visible in a large, stylized font, partially obscured by the overlay.

FREQUENTLY ASKED QUESTIONS

Frequently asked questions regarding Report Services and Reporting Dashboards

- + **What is the end-of-life date for Report Services?**
 - Tuesday, December 31, 2019
- + **What is the last version of OnBase with Report Services?**
 - OnBase Foundations EP2
- + **Will Hyland still support Report Services?**
 - Based on maintenance agreements and OnBase Module Support Lifecycle
- + **Why is Hyland Sunsetting Report Services?**
 - Reporting Dashboard has always been go-forward OnBase Reporting Tool
 - Reporting Dashboard now has parity with Report Services

+ **Is there a cost for using Reporting Dashboards?**

- Reporting Dashboard requires a new license and Unity Client Server License
- Reporting Services can be turned off after migration or end-of-life support

+ **What features are missing from Reporting Dashboards?**

- Reporting Dashboards has complete feature parity with Reporting Services

+ **How do I move all my reports from Report Services?**

- OnBase Foundation includes report conversion tool

- + **Are you able to schedule Reporting Dashboard reports?**
 - Yes, using the Unity Scheduler
- + **Do Reporting Dashboard reports update in real time?**
 - Report will be current at time of run, also includes “Refresh” option
- + **Can you report on Document Knowledge Transfer?**
 - Eventually, possibly as early as Foundation EP3
- + **Do you have to have the Unity Client?**
 - Yes, but future versions will be web-based and not require Unity Client

+ **How is the performance for Reporting Dashboards?**

- It is about the same as Report Services
- It is always best to write any SQL reports in test and have a DBA look over them before moving into Production
- Also, keep in mind that Dashboards run on the Application Servers so every organization will be different

A blue-tinted photograph of a modern office interior. In the foreground, a person with long blonde hair is seen from behind, sitting at a desk with multiple computer monitors. To the right, there is a large, leafy green plant. In the background, other office workers are visible at their desks. The ceiling features exposed pipes and modern lighting fixtures. On the right wall, a logo for 'xpi consultants' is partially visible.

WHAT IS REPORTING DASHBOARDS

Information regarding Reporting Dashboards and a demonstration

- + **Reporting Dashboards Was Introduced In Onbase 14**
- + **Immediate Visibility Into System And Business Health**
- + **Create And Share Dashboards**
 - Highlight important business data without engaging IT resources
- + **Present data in a variety of graphical formats**
 - Including charts, graphs, scorecards, gauges, maps and more
- + **Interactive Features**
 - Easily monitor performance and analyze trends in real-time
- + **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**
 - To make proactive business decisions

- + **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**

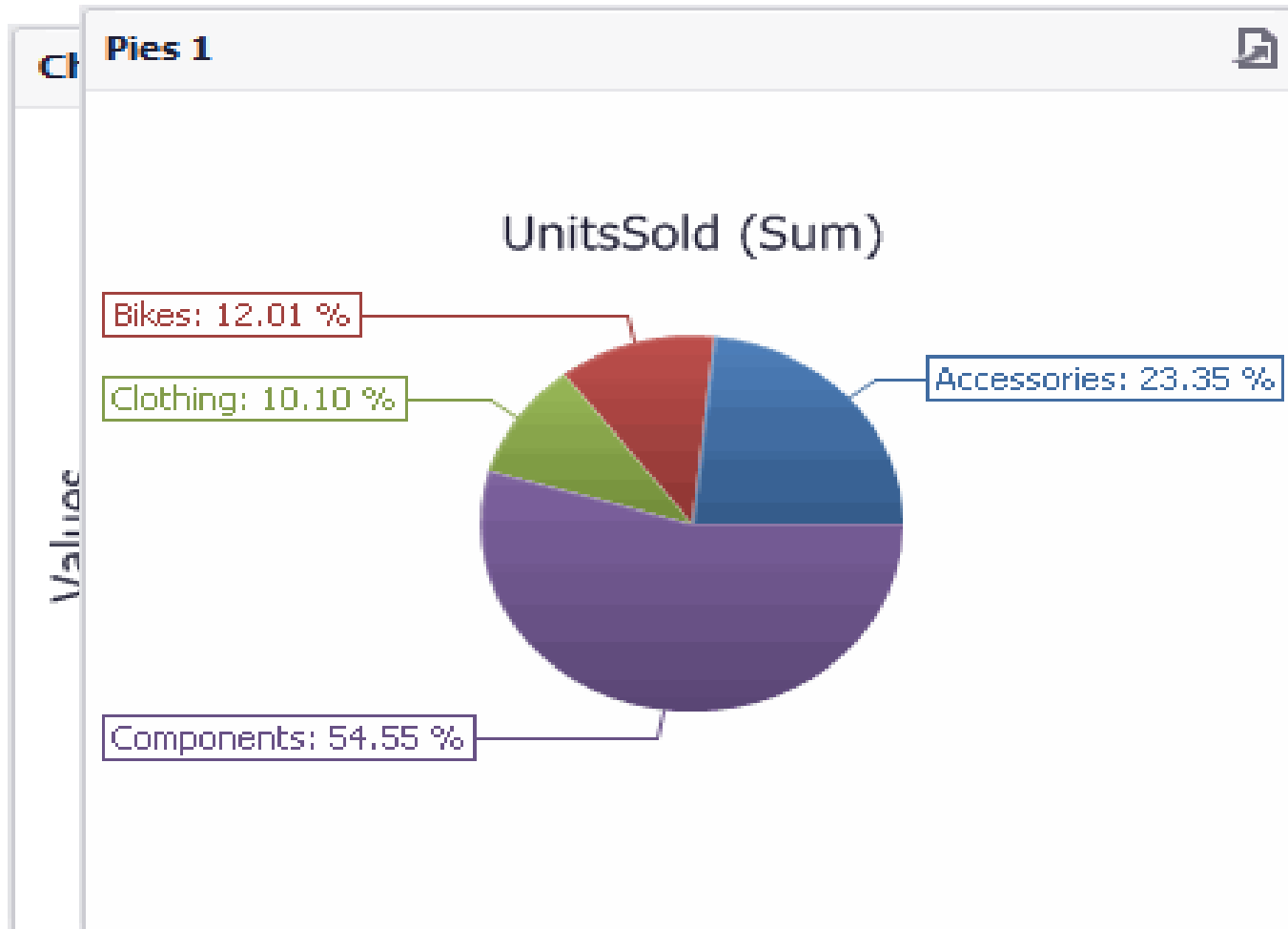
- By allowing business users to create their views of process and performance data

- + **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

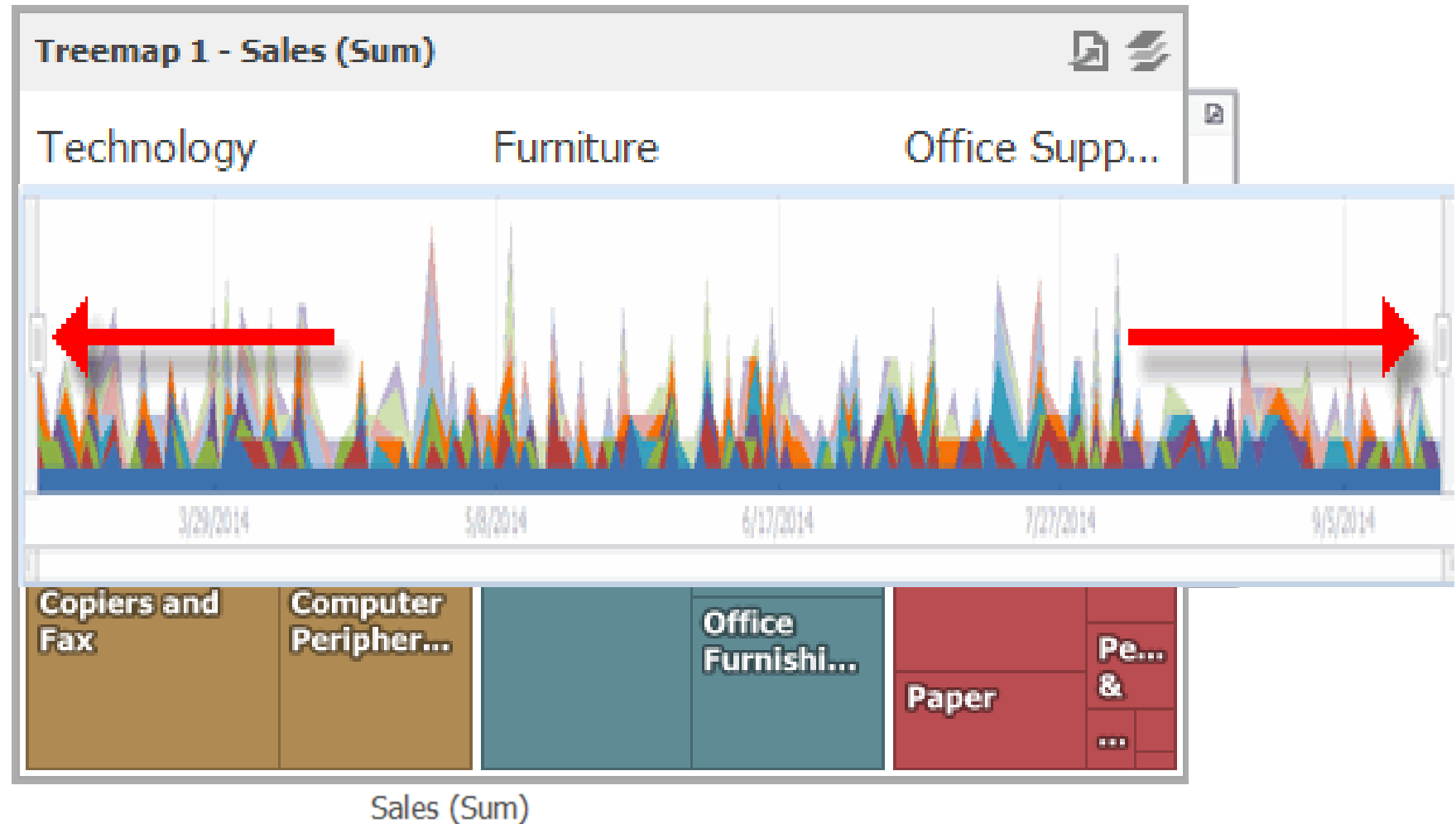
+ Grid

+ Chart

+ Pies

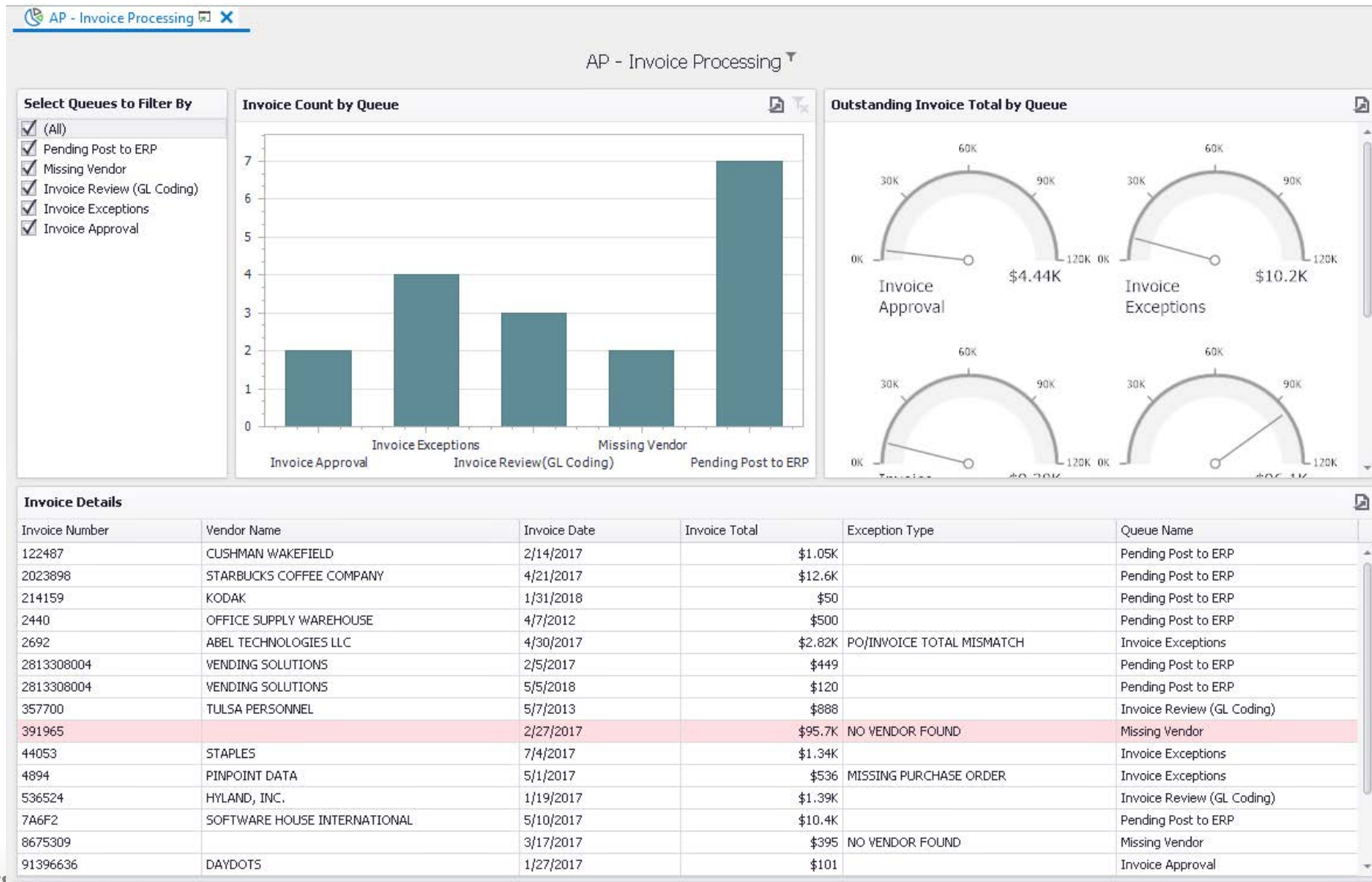


- + **Pivot**
- + **Gauges**
- + **Cards**
- + **Choropleth Map**
- + **Scatter Chart**
- + **Treemap**
- + **Range Filter**



- + **Agenda & Minutes**
- + **Custom SQL Query**
- + **Distribution Service**
- + **Document Imaging Query – Time in Queue**
- + **Document Imaging Query – Time to Process**
- + **Document Query**
- + **Plan Review**
- + **Workflow Activity**
- + **Workflow Approval Activity**
- + **Workflow Approval Configuration**
- + **Workflow Approval Delegation**
- + **Workflow Approval Items**
- + **Workflow Configuration**
- + **Workflow Inbox**
- + **Workview**

REPORT EXAMPLES



+ Reporting Dashboard Product Demonstration

MIGRATING REPORTS WITH CONVERSION TOOL



Best practices for Migrating your reports

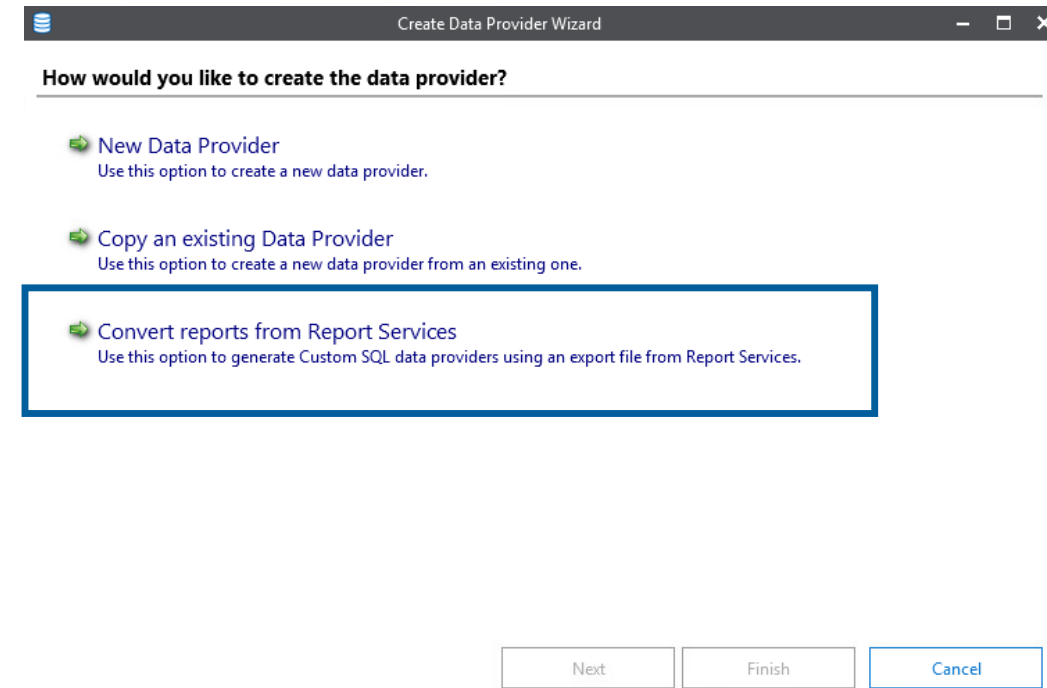
- + **Conversion Tool Available in OnBase 18+**
 - Transforms reports into custom SQL data providers
- + **“Convert Reports from Report Services”**
 - New option in the Create Data Provider Wizard
 - Generates custom SQL data providers using an XML export file
 - New data providers are used as data sources for dashboards
- + **Leverage 180+ Pre-built Reports from Report Services**
 - Automatically create SQL queries to replicate within Reporting Dashboards
 - Additional features never-before available in Report Services

+ Migrating Report Services Reports Product Demonstration

STEPS FOR MIGRATING REPORTS



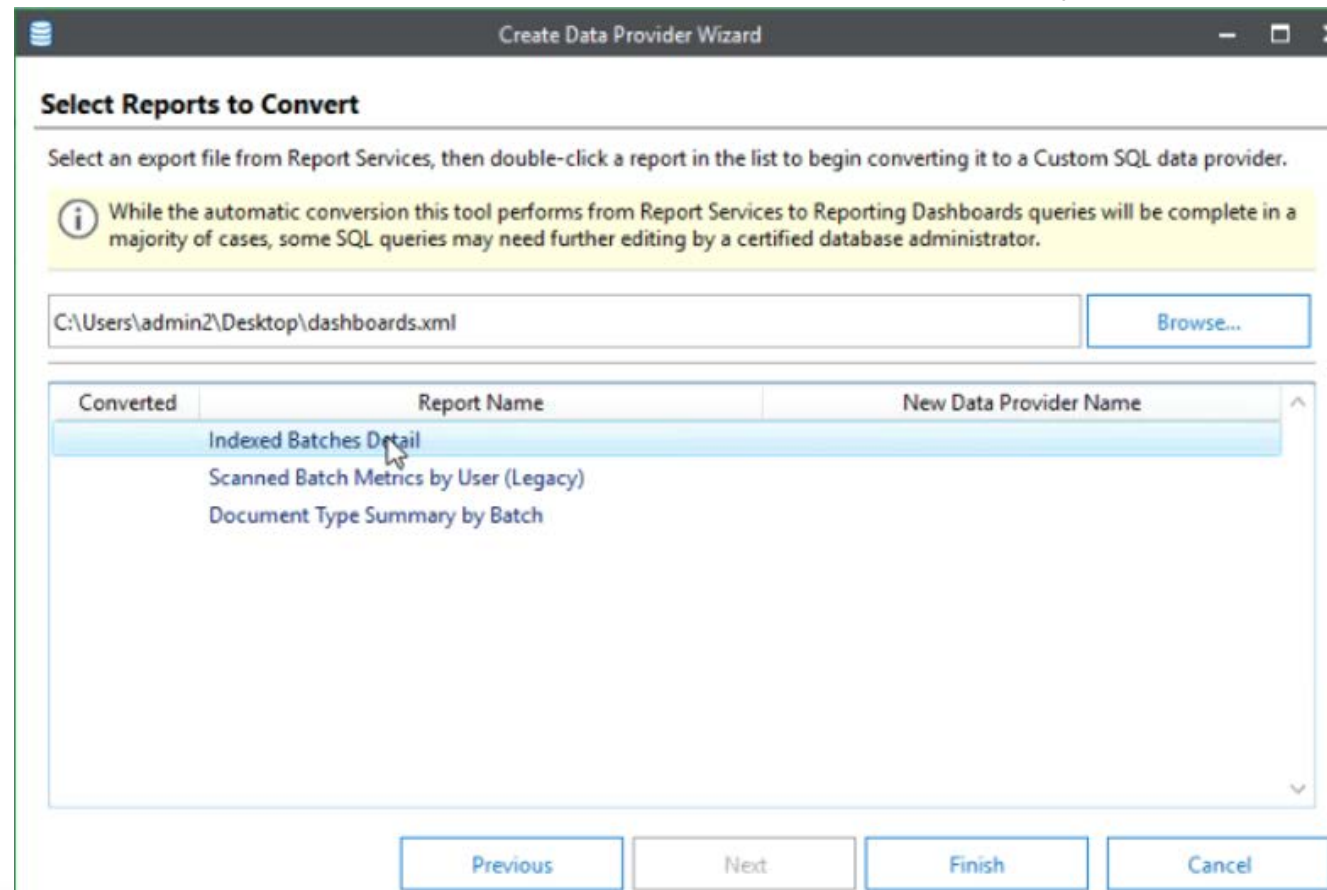
- + Log into Unity Client
- + Select Reporting 
Reporting
- + Select Administration
- + Select Create New Data Provider 
Create New Data Provider
New
- + Select Convert reports from Report Services



STEPS FOR MIGRATING REPORTS



- + Select export file from Report Services (.xml)
 - Multiple Report Services export files can be added on this screen
 - Double-click on the file in the list to edit the detail of each import



STEPS FOR MIGRATING REPORTS



- + Add a name and description for your data provider
- + Edit the SQL query

The image shows a screenshot of the 'Edit SQL query' dialog box in the OnBase application. The dialog has a title bar with the OnBase logo and window controls. Below the title bar, there is a section titled 'Edit SQL query' with a subtitle: 'Enter the SQL statements or stored procedure reference that will be executed to retrieve data for this data provider'. A yellow warning box contains an information icon and text stating: 'SQL queries should only be edited or authored by a certified database administrator. Poorly constructed queries not written against schema indices can result in abnormally high database and server resource usage that can adversely affect the performance of your entire system.' Below the warning, a text area contains a complex SQL query. The query starts with 'SELECT' and lists several columns: 'aq.batchnum AS "Batch #"', 'aq.batchname AS "Batch Name"', 'sq.queueName AS "Scan Queue"', and 'sl.log'. It includes several 'INNER JOIN' clauses connecting tables like 'hsi.archivedqueue', 'hsi.scanqueue', 'hsi.useraccount', 'hsi.userxusergroup', 'hsi.usergroup', and 'ugs'. The query ends with 'WHERE ug.usergroupnum = ##OB_OPTIONSELECT_ALL{(@{UserGroup}}, -1)} ugs ON ua.usernum = ugs.'. At the bottom of the dialog, there is a 'Database:' dropdown menu set to 'Current Session' and a checkbox labeled 'Display all date/time columns in local time'. Four buttons are at the very bottom: 'Previous', 'Next', 'Finish', and 'Cancel'.

STEPS FOR MIGRATING REPORTS



- + Configure the Input Parameters
- + Choose the display columns
- + Update the access

The 'Configure input parameters' dialog box is shown. It contains a title bar with the text 'Configure input parameters'. Below the title bar, there is a section for configuring definitions for input parameters in the SQL query. It includes three checkboxes: 'Allow the consolidation of parameters on a dashboard', 'Allow using default values at runtime', and 'Always prompt for parameter values at runtime'. Below these checkboxes is a table with four columns: 'Symbol', 'Caption', 'Data Type', and 'Select List'. The table contains four rows of data: 'DateRange' (Date Range, Numeric, UserGroup_id), 'UserGroup' (User Group, Numeric, Indistinguish_id), 'Indistinguish' (User, Numeric, ScanQueue_id), and 'ScanQueue' (Scan Queue, Numeric, ScanQueue_id). At the bottom right of the dialog box, there is a 'Configure' button and a set of navigation buttons: 'Previous', 'Next', 'Finish', and 'Cancel'.

Symbol	Caption	Data Type	Select List
DateRange	Date Range	Numeric	UserGroup_id
UserGroup	User Group	Numeric	Indistinguish_id
Indistinguish	User	Numeric	ScanQueue_id
ScanQueue	Scan Queue	Numeric	ScanQueue_id

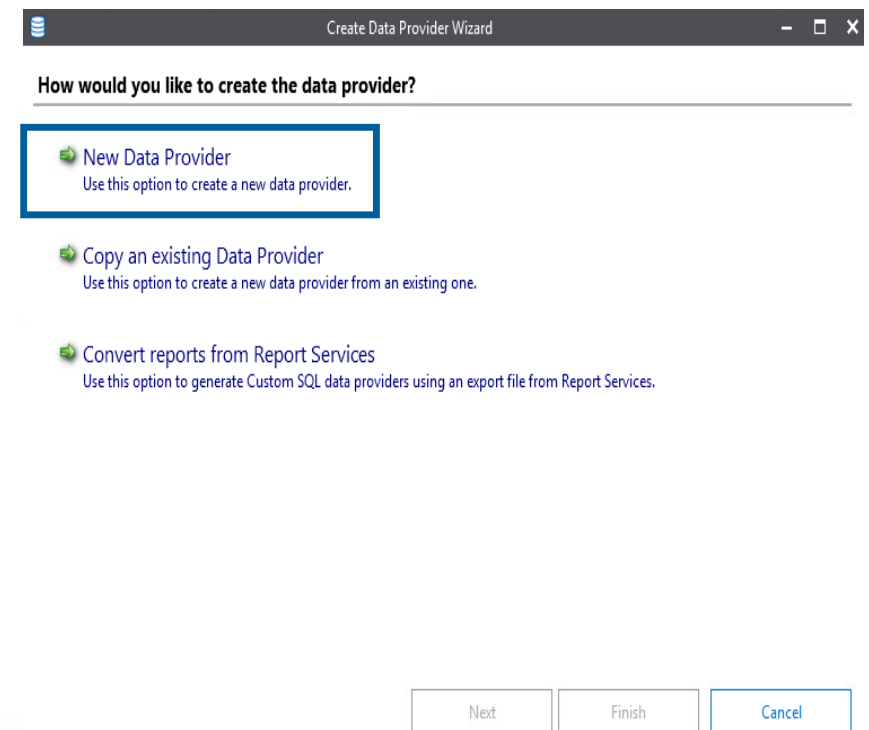
The 'Choose the display columns for the data provider' dialog box is shown. It contains a title bar with the text 'Choose the display columns for the data provider'. Below the title bar, there is a section for adding or removing display columns by selecting checkboxes in the item list. It includes a checkbox for 'All Fields' and a list of columns: 'Batch #', 'Batch Name', 'Scan Queue', 'Log Date', and 'User'. Below the list, there is a table with five columns: 'Batch #', 'Batch Name', 'Scan Queue', 'Log Date', and 'User'. At the bottom right of the dialog box, there is a 'Configure' button and a set of navigation buttons: 'Previous', 'Next', 'Finish', and 'Cancel'.

Batch #	Batch Name	Scan Queue	Log Date	User
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MIGRATING REPORTS WITHOUT CONVERSION TOOL

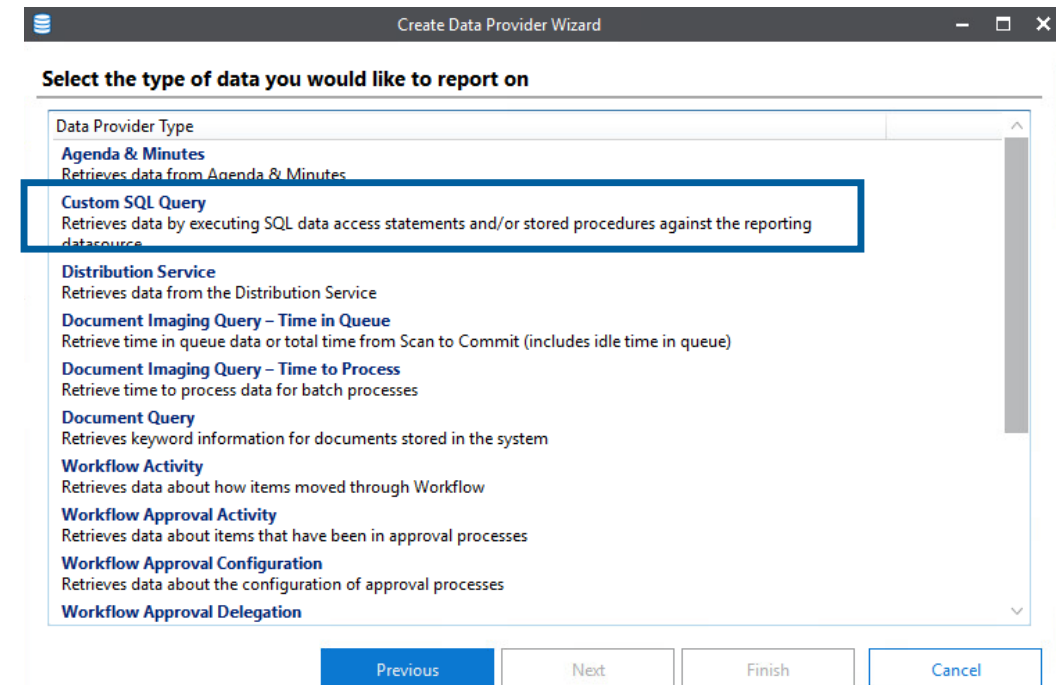
Best practices for Migrating your reports

- + **Export the report from Report Services**
- + **Log into Unity Client and select Reporting**
- + **Select Administration**
- + **Select Create New Data Provider**
- + **Select New Data Provider**
- + **Create a Name and Description**



+ Select Custom SQL Query

- Open the export you saved from Report Services and copy it
- Paste it into the Edit SQL Query section
- Configure the Input Parameters
- Choose the display columns
- Update the access



SUMMARY & QUESTIONS

Hyland Report Services has an End of Life date of 12/31/19. OnBase Foundation EP3 is expected to be released without Report Services. RPI Consultants share information regarding moving your Report Services reports to Reporting Dashboards.

Thank you for attending #WebinarWednesday with RPI Consultants and our 2020 OnBase Webinar Series. Find this webinar recording and all previously recorded webinars online at www.rpic.com/webinars.

- + Frequently Asked Questions
- + What is Reporting Dashboards
- + Migrating Reports with Conversion Tool
- + Migrating Reports without Conversion Tool

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by Hyland

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www.rpic.com/OnBase

- + Identify Enhancement Opportunities for Current Solutions**
 - Intelligent Data Capture enabled automation
 - Automated decisions and tasks to reduce errors and delays
- + Identify Opportunities for new Solutions & Departments**
 - Automated ancillary workflows and processes related to current solution
 - Completely new departments and workflows
- + License and Module Inventory**
 - Understand what you're using and what you're not
 - What can you be doing with what you have already

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The Hyland logo features the word "Hyland" in a green, serif font. A small registered trademark symbol (®) is located at the top right of the letter "d".

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