

Quick Start Guide: LFO Dashboards

1. **Unity Client Install:** To use the LFO dashboards the OnBase Unity Client must be used.
 - a. Contact the Tier I for your department. There is a Quick Start Guide (QSG) for Unity Client install available upon request.
 - b. Submit requests for the Unity Client QSG to Business Operations at businessops@louisville.edu

2. **Login to OnBase:**
Login to OnBase using your university userID and password.

3. **Dashboard:**
 - a. Click on the Dashboards icon that is located in the top ribbon.
 - b. Click on the triangle beside Shared With Me.
 - c. Click the small triangle beside Procard.
 - d. Available reports will appear.

4. **Dashboard Homepage:**
 - a. The dashboard can become the homepage.
 - b. Once in the dashboard click on the Home button found at the top left of the screen
 - c. Click on the triangle under the Home button.
 - d. Select Make this layout my Home Page.

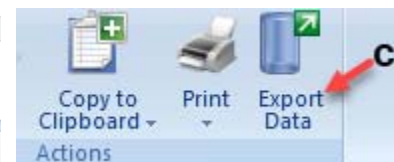
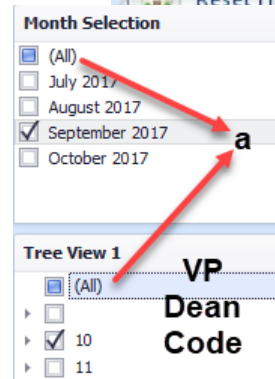
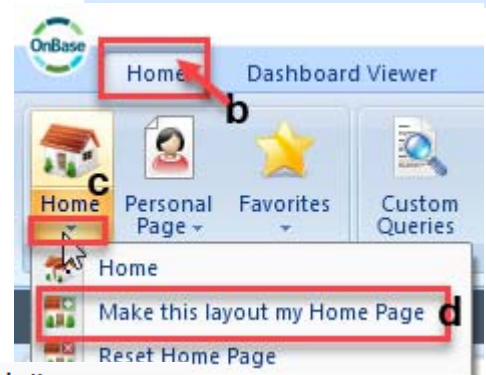
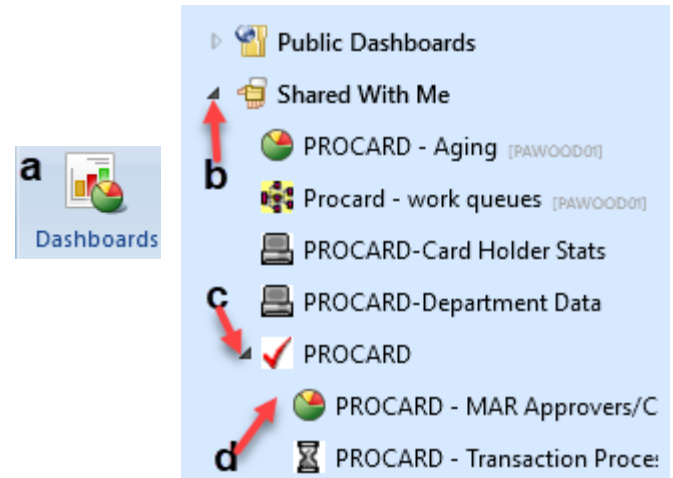
5. **Procard – MAR Approvers and Certifiers:**

Report provides: Billing cycle date, card number (6 digits), cardholder name, certified by, certified date, approved by, approved by date and department ID number

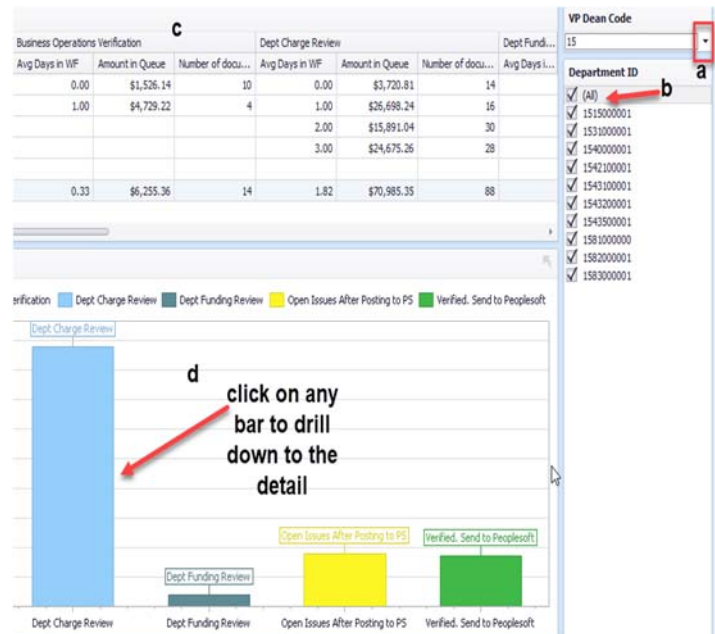
- a. Uncheck "All" by clicking the "All" button and then select the month you want to review and your VP Dean Code.
- b. The dashboard will automatically generate once a selection is made.
- c. Export to Excel by clicking the Export Data button in the top ribbon.

6. **Procard – Transaction Aging Report:**

Report provides a list of each queue, average days in workflow, dollar amount in queue, number of transactions and a grand total for all transactions



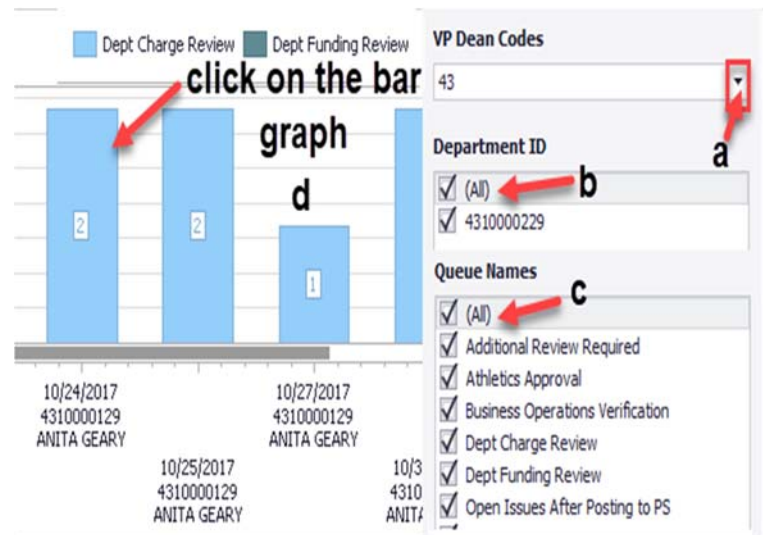
- On the right hand side of the report select the VP Dean Code by clicking on the down arrow next to the VP Dean Code number.
- Leave "All" checked under Department ID for a full view of everything under the VP Dean Code. To view data by department check the box next to the department(s) that need to be viewed.
- The top half of this report is in a spreadsheet format and evaluates each queue that has transactions to report the number of days transactions have been in each queue. To download this data into Excel follow step 5c.
- The bottom half of this report is a bar graph with each queue represented by a different color. Click the bar of any queue until the OnBase transaction form appears. The form contains the receipt and other documentation which can be viewed by clicking on the link in the form.
- The dates are selected by using the adjustable slide date parameter at the bottom. Narrow down the dates by sliding the ends points until the dates for the desired review are selected.



7. Procard – VP Dean Info with Dates:

Report provides the date the transaction was put into the queue, department ID number, number of transactions in each queue and cardholder name

- On the right hand side of the report select the VP Dean Code by clicking on the down arrow next to the VP Dean Code number.
- Leave "All" checked under Department ID for a full view of everything under the VP Dean Code. To view data by department check the box next to the department(s) that need to be viewed.
- Select the queue that needs to be reviewed. Leave "All" checked to see all queues.
- The report will then display to the left. Click on the person's transactions that you want to review.



- e. The bar graph will appear in the bottom window. Double click the bar graph to review the transaction level detail.
- f. For date selection follow step 6e.

8. Procard - Card Holder and Dept ID with VP Dean Select Dept

Report provides the department ID, cardholder name and the number of transactions in each queue

- a. On the right hand side of the report select the VP Dean Code by clicking on the down arrow next to the VP Dean Code number.
- b. Leave "All" checked under Department ID for a full view of everything under the VP Dean Code. To view data by department check the box next to the department(s) that need to be viewed.
- c. Select the queue that needs to be reviewed. Leave "All" checked to see all queues.
- d. The report will then display to the left. Click on the person's transactions that you want to review.
- e. The bar graph will appear in the bottom window. Double click the bar graph to review the transaction level detail.
- f. For date selection follow step 6e.

