OnBase Guide - Reporting Dashboards
- Make a Dashboard Public

**Goal:** To create a public URL to share an existing Reporting Dashboard outside the OnBase clients.

**Complexity Level:** Departmental Administrative Users, Reporting Dashboard Developers

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Background
As of OnBase version 18, you can now create a public URL for a reporting dashboard. This allows you to share reporting dashboards with individuals who do not have an account in OnBase, thus minimizing barriers to access this information. This guide will show you how to create the URL for an existing reporting dashboard.

This guide does not cover creation of reporting dashboards, refer to the Reporting Dashboards MRG for more information. Contact UIS_DM_Support@cu.edu for assistance.

If you do not see the Reporting Dashboards button or it is greyed out, please contact one of the OnBase Certified Department Administrators to grant that access.

In the OnBase Unity Client

1. Log into the Unity Client, and open Reporting Dashboards by clicking the appropriate icon on the Home tab of the menu ribbon.

2. Click on Administration in the bottom left corner of your screen.

3. Select the data provider you want to make public. Then click Assign Users.

5. The Access Level should be “Execute Only”. If it is not already set to this level, select the user group in the list, right click and choose the correct access level.

6. Click **Gallery** in the bottom left corner of your screen.

7. Right-click on the dashboard you want to make public. Then select **Share**.
8. Click the **Add** button.

9. Search for the group **Reporting - X - X - Public Dashboards**. Select the group, and click **OK**. The group should appear in the list, with an Access Level of “Read Only.” Right click to change this if necessary. Once complete, click **Share**.

10. Open the dashboard you want to share. Under the Item Viewer tab of the menu ribbon, click the **Copy to Clipboard** button, and then select **Copy Hyperlink**.
11. Paste the link you just copied into a text editor, like Notepad. Add “Public” to the end of the “Reporting Viewer” section of the URL. Do not change any of the rest of the URL.

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</tr>
</thead>
<tbody>
<tr>
<td>After</td>
<td><a href="https://dm.prod.cu.edu/ReportingViewerPublic/Viewer.aspx">https://dm.prod.cu.edu/ReportingViewerPublic/Viewer.aspx</a></td>
</tr>
</tbody>
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12. Copy and paste the modified URL into a browser to verify you can view the dashboard. This link can then be shared to users who will access the dashboard using this method.