



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus



OnBase Guide - Reporting Dashboards - Share by URL

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

Complexity Level: Departmental Administrative Users, Reporting Dashboard Developers

12/21/2021

Table of Contents

Background	3
In the OnBase Unity Client	3
Share the Data Provider.....	3
Share the Dashboard.....	4
Create the URL.....	6



Background

As of OnBase version 18, you can create a URL that will display a reporting dashboard. This guide will show you how to create the URL for an existing 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. However, the person will still need to be connected to a CU network (either on campus or via VPN).

This method should not be used to share dashboards containing any sensitive or personally identifiable information. Dashboards of that nature will need to be viewed within the OnBase Unity or web client using a user account with appropriate access.

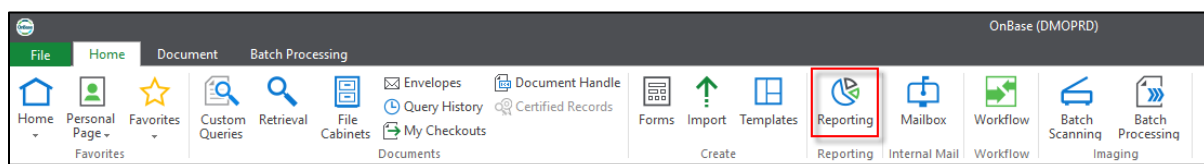
This guide does not cover creation of reporting dashboards, refer to the Reporting Dashboards MRG or our [Reporting Dashboards guide](#) for more information. Contact UIS_DM_Support@cu.edu for assistance.

If you do not see the Reporting Dashboards button or it is greyed out and you have completed the necessary training, please contact one of the [OnBase Certified Department Administrators](#) to grant that access.

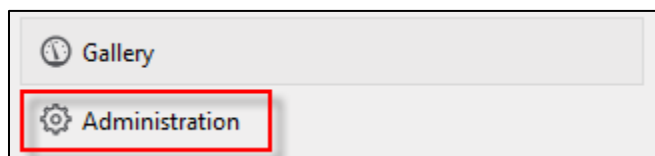
In the OnBase Unity Client

Share the Data Provider

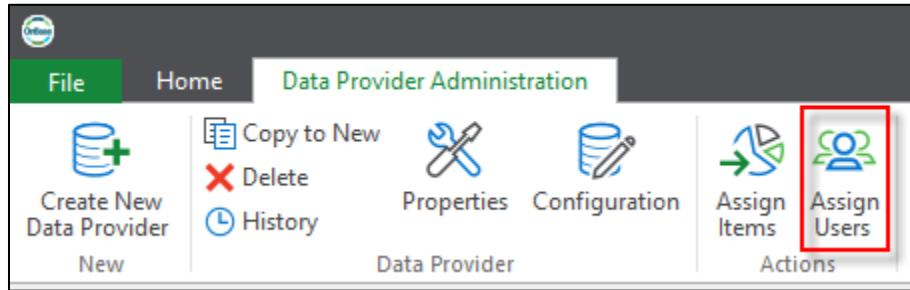
1. Log into the Unity Client, and open **Reporting Dashboards** by clicking the appropriate icon on the Home tab of the menu ribbon.



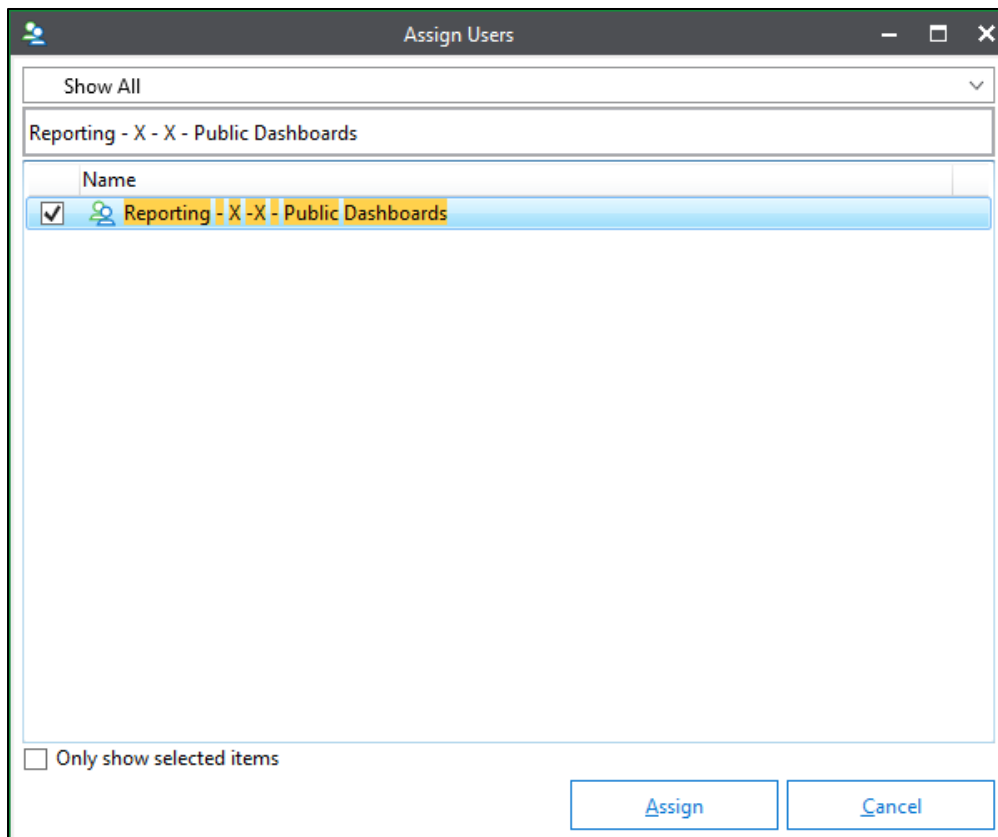
2. Click on **Administration** in the bottom left corner of your screen.



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



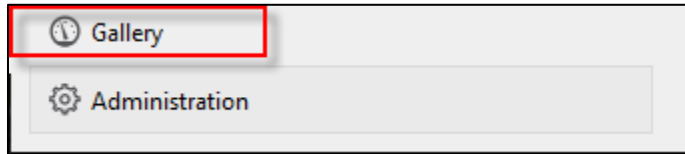
4. Search for the group *Reporting - X - X - Public Dashboards*. Select the group, and click **Assign**.



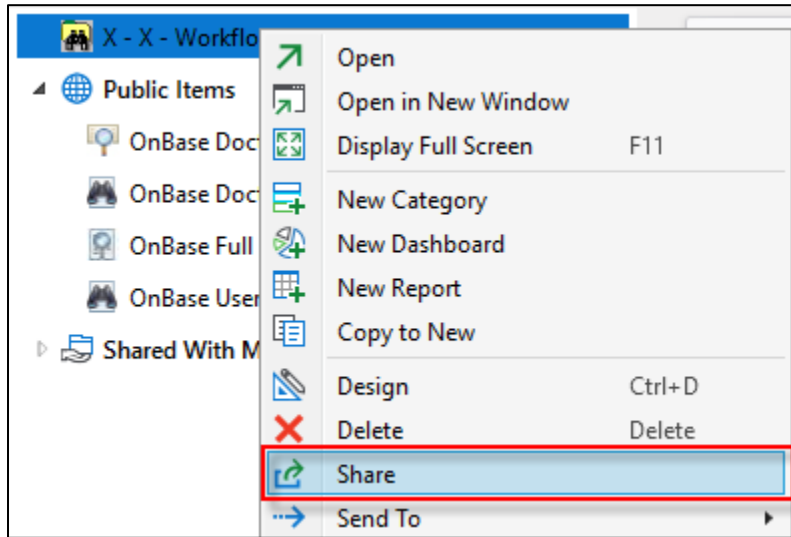
5. The Access Level should be "Execute Only". If it is not already set to this level, select the user group in the list, right click and choose the correct access level.

Share the Dashboard

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

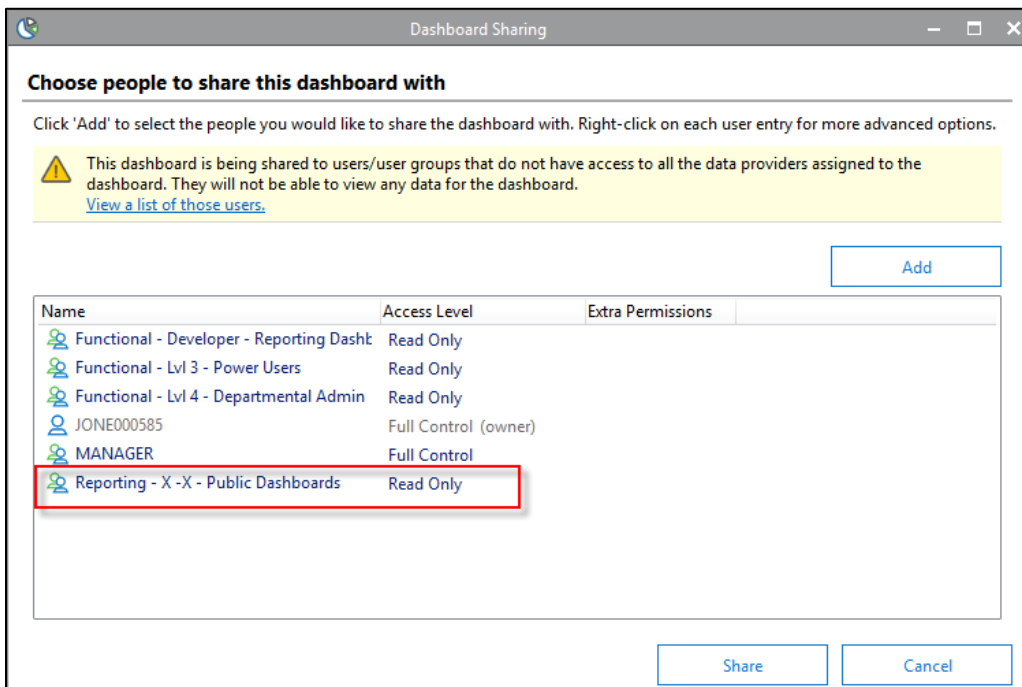


2. Right-click on the dashboard you want to make public. Then select **Share**.



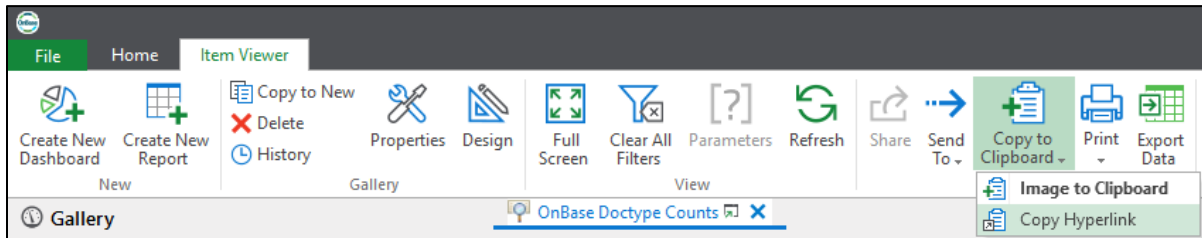
3. Click the **Add** button.

4. 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**.



Create the URL

1. 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**.



2. 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.

Before	https://dm.prod.cu.edu/ReportingViewer/Viewer.aspx
After	https://dm.prod.cu.edu/ReportingViewerPublic/Viewer.aspx

3. 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. The URL is not saved anywhere within OnBase, so make sure you keep track of it.