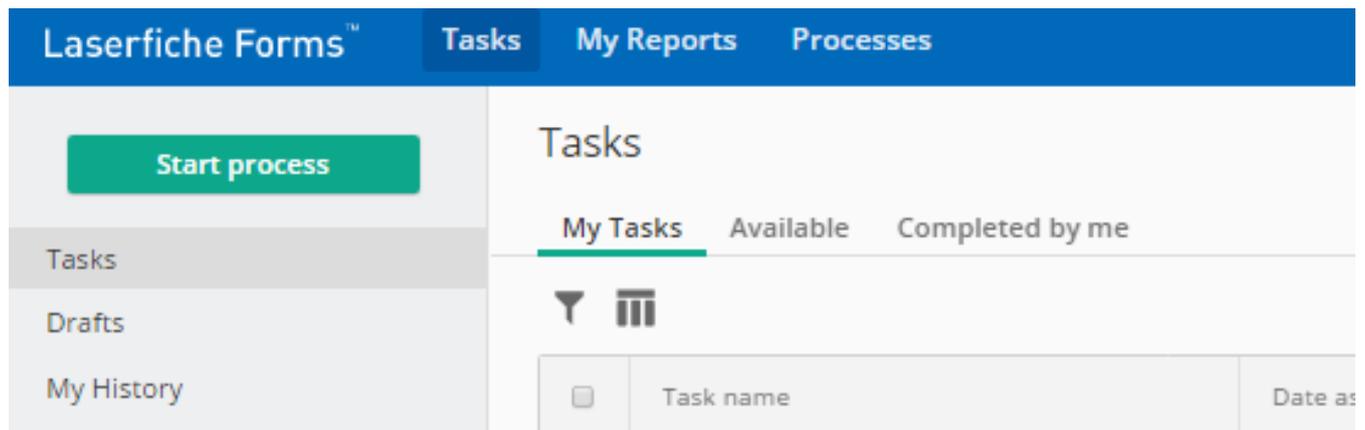


# Laserfiche Forms - Using the Operational Dashboard

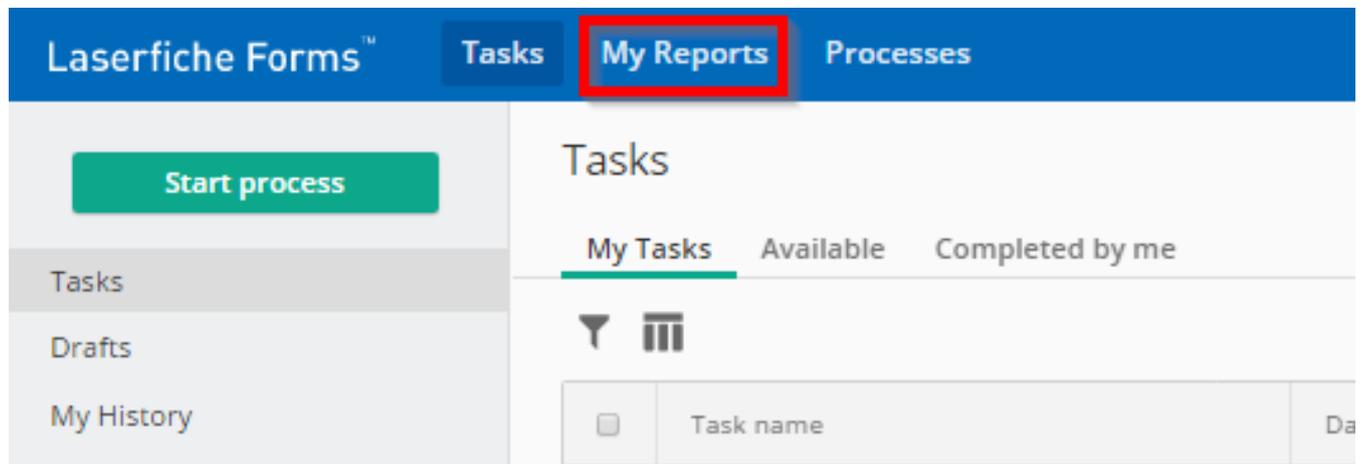
380 KB Admin Wed, Dec 14, 2016 [Laserfiche](#) 2010

As we build more forms in Laserfiche and broaden the users - we want to make sure that we document some of the functionality that is now available for Form Managers in Laserfiche Forms. Not everyone will be able to see the dashboards associated with form, only those that have been given access by the Laserfiche team will be able to see any forms dashboards. (questions? contact [laserfiche@heifer.org](mailto:laserfiche@heifer.org))

First let's start with logging into [lf.heifer.org/forms](http://lf.heifer.org/forms) Remember - Laserfiche forms is not the same site as the Laserfiche repository.



Next, to see the the Dashboard for your form, click on My Reports at the top of the screen:



You should see this page and any reports that you have access to.

Laserfiche Forms™ Tasks **My Reports** Processes

### Process Reports

Reports **Dashboards**

Report name ▲	Process
★ Postback	Postback Submission Form

Click on Dashboards to see any Operational Dashboards that you have access.

Laserfiche Forms™ Tasks **My Reports** Processes

### Process Reports

Reports **Dashboards**

Dashboard name ▲	Process
☆ Agresso Access Form - Operational Dashboard	Agresso Access Form

Click on the Dashboard you want to open - note that the dashboard tells you how many instances of the form are currently in process - and what stage they are in below the total.

Laserfiche Forms™ Tasks **My Reports** Processes Michelle Mangum

Process Reports > Facilities Set Up Assistance Form - Operational Dashboard

Last updated Wednesday, Dec 14 2:12 PM

#### Instances Overview

8 Total in progress

0 In progress with suspended steps

8 In progress with no errors

#### INSTANCES BY STAGE

Default Stage 7

Stage 2 1

#### User Task Overview

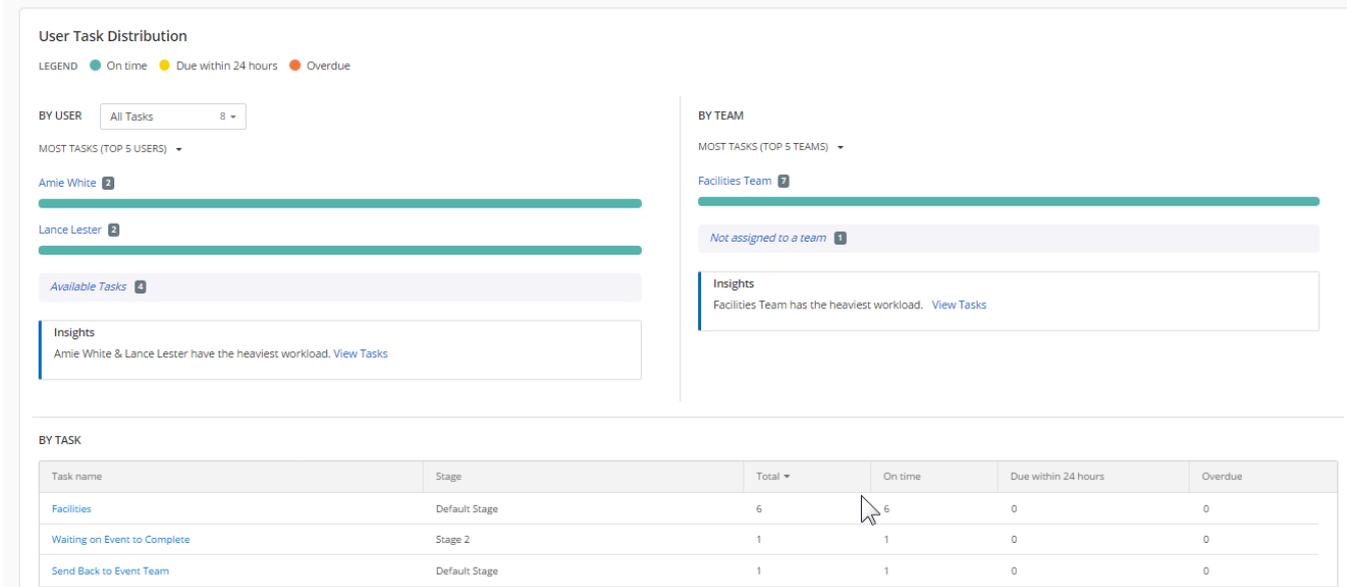
8 Total in progress

0 Suspended user tasks

8 In progress with no errors

#### TASK STATUS

On time 8



The data is then broken down by user and stages to a more detailed look.

You can click on the hyperlink next to the Total instances to see the individual forms.

### Instances In Progress

Search instances

Instance name	Status	Started by	Start date	Current step	Step start date	Assigned to
Facilities Set Up Assistance Form 2319: M...	In progress	Marcia Shelton	12/7/2016 2:40 PM	Facilities	12/8/2016 12:08 PM	Amie White
Facilities Set Up Assistance Form 2250: M...	In progress	Marcia Shelton	11/23/2016 3:02 PM	Facilities	11/23/2016 3:02 PM	Facilities Team
Facilities Set Up Assistance Form 1842: M...	In progress	Marcia Shelton	9/7/2016 4:53 PM	Facilities	9/7/2016 4:53 PM	Facilities Team
Facilities Set Up Assistance Form 1841: M...	In progress	Marcia Shelton	9/7/2016 4:47 PM	Facilities	9/7/2016 4:47 PM	Facilities Team
Facilities Set Up Assistance Form 1840: M...	In progress	Marcia Shelton	9/7/2016 4:40 PM	Facilities	9/7/2016 4:40 PM	Facilities Team
Facilities Set Up Assistance Form 1839: M...	In progress	Marcia Shelton	9/7/2016 4:36 PM	Facilities	9/7/2016 4:36 PM	Facilities Team
Fidelity Communications Holiday Party - ...	In progress	Marcia Shelton	9/7/2016 3:54 PM	Waiting on Event to Complete	12/14/2016 10:47 AM	Facilities Team
Facilities Set Up Assistance Form 1580: A...	In progress	Amie White	7/26/2016 11:14 AM	Send Back to Event Team	7/26/2016 12:04 PM	Amie White

1-8 of 8 Show 20

Then you can click on any of the individual forms to see the audit trail

History		Variables							
Step	Status	Start date	Finish date	Duration	Action by	Action	Comments	Submission ID	Submission IP address
Start	Completed	12/7/2016 2:40 PM	12/7/2016 2:40 PM	Less than a minute	Marcia Shelton	Submit		5636	10.122.1.63
Submitter Email	Completed	12/7/2016 2:40 PM	12/7/2016 2:40 PM	Less than a minute					
Facilities	Completed	12/7/2016 2:40 PM	12/8/2016 12:02 PM	21 hours 22 minutes	Amie White	Edit		5669	10.131.1.11
<ul style="list-style-type: none"> <li>The task was assigned to Facilities Team - 12/7/2016 2:40 PM</li> <li>Lance Lester reassigned the task to Amie White - 12/7/2016 2:43 PM</li> </ul>									
Facilities	Completed	12/8/2016 12:02 PM	12/8/2016 12:02 PM	Less than a minute					
Back to Event Team	Completed	12/8/2016 12:02 PM	12/8/2016 12:02 PM	Less than a minute					
Send Back to Event Team	Completed	12/8/2016 12:02 PM	12/8/2016 12:08 PM	5 minutes	Marcia Shelton	Submit		5671	10.122.1.63
<ul style="list-style-type: none"> <li>The task was assigned to Marcia Shelton - 12/8/2016 12:02 PM</li> </ul>									
Facilities	Assigned to Amie White	12/8/2016 12:08 PM							
<ul style="list-style-type: none"> <li>The task was assigned to Facilities Team - 12/8/2016 12:08 PM</li> <li>Lance Lester reassigned the task to Amie White - 12/8/2016 1:32 PM</li> </ul>									

This should assist in answering end user questions about their requests through Laserfiche.

Questions? Contact [Laserfiche@heifer.org](mailto:Laserfiche@heifer.org) for support.

Online URL: <https://itskb.heifer.org/article.php?id=380>