University of Colorado
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OnBase
by Hyland

OnBase Guide – Unity Life Cycle Conversion

Goal: To convert legacy life cycles to Unity life cycles

Complexity Level: Departmental Workflow Developers

12/13/2023

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Background

When creating a life cycle, the current default is to create a Unity life cycle. This is the newer functionality (compared to legacy non-Unity life cycles) which enables routing of non-document content (ex. WorkView objects) and other functionality enhancements (such as ownership and portfolio relationships).

Eventually, Hyland may end support of legacy life cycles, so no additional legacy life cycles should be created. In order to be prepared for any future changes to legacy life cycle support, it is **strongly encouraged** that any existing legacy life cycles be converted as time permits.

A list of legacy life cycles is available on the *OnBase SV Workflow Configuration* dashboard.

More information about life cycle conversion is available on page 1026 of the **EP3** Workflow MRG.

All steps should be performed in non-production and thoroughly tested before making the same changes in production.

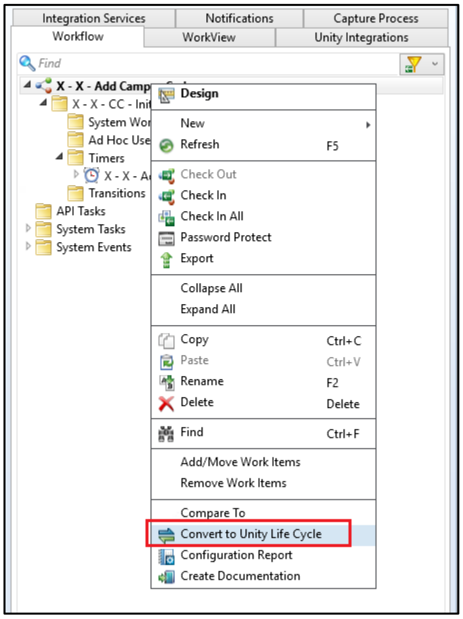
Requirements

You will need to be in the Workflow developer user group. You will need to use Studio and Unity Management Console.

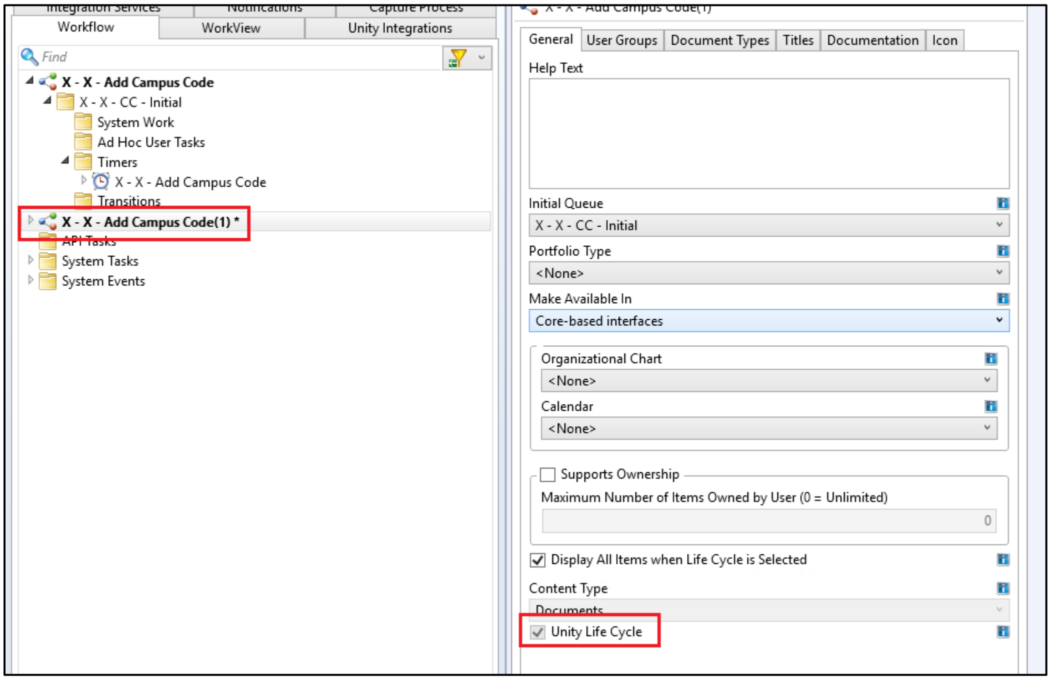
Steps to Complete in Studio

1. Convert life cycle

In the right-click menu for a life cycle, there is an option to Convert to Unity Life Cycle.



This creates a copy of the life cycle which is a Unity life cycle.



Integration Services | Notifications | Capture Process
Workflow | WorkView | Unity Integrations

Find

- X - X - Add Campus Code
  - X - X - CC - Initial
    - System Work
    - Ad Hoc User Tasks
    - Timers
      - X - X - Add Campus Code
    - Transitions
- X - X - Add Campus Code(1) *
- API Tasks
- System Tasks
- System Events

X - X - Add Campus Code(1)

General | User Groups | Document Types | Titles | Documentation | Icon

Help Text

Initial Queue: X - X - CC - Initial

Portfolio Type: <None>

Make Available In: Core-based interfaces

Organizational Chart: <None>

Calendar: <None>

☐ Supports Ownership

Maximum Number of Items Owned by User (0 = Unlimited): 0

☑ Display All Items when Life Cycle is Selected

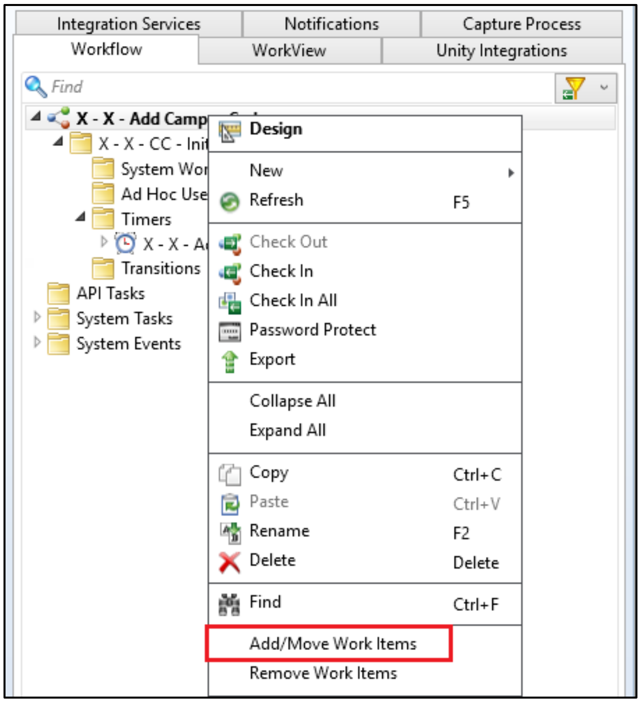
Content Type: Documents

☑ Unity Life Cycle

It can help to rename both so it's clear which is which.

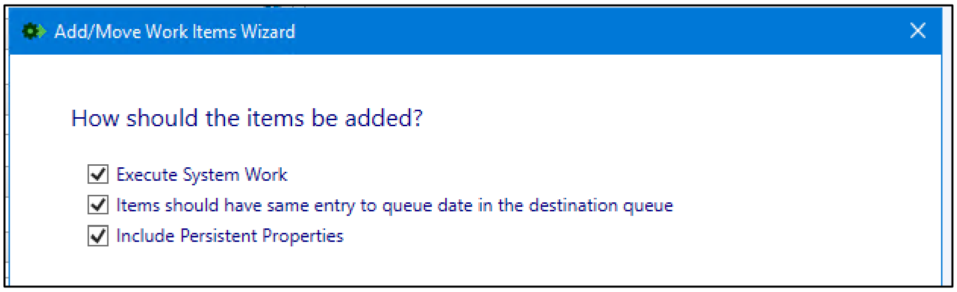
2. Move work items

Any items that are in the original life cycle can be moved to the new converted life cycle using the “Add/Move Work Items” option in Studio. Right click the original legacy life cycle and choose this option from the menu.



Items should be moved to the new life cycle, or if you want them to remain in the original life cycle while you test, you can add them to the new life cycle while keeping them in the original life cycle.

You can preserve the items' queue entry date and any persistent properties using this feature.



How should the items be added?

☑ Execute System Work
☑ Items should have same entry to queue date in the destination queue
☑ Include Persistent Properties

3. *Test, Review and Reconfigure as Needed*

The life cycle should be tested to ensure all functionality is retained. Some items that may need to be reconfigured include:

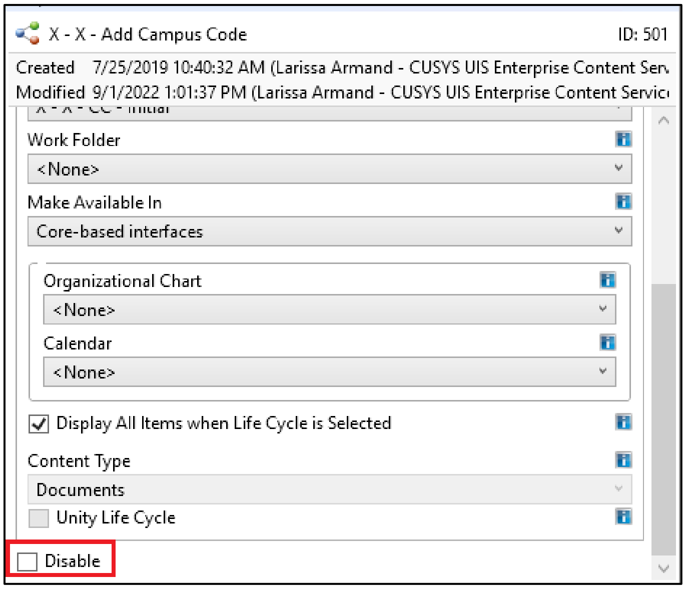
- References to the life cycle/queues in other life cycles
  - The new Unity life cycle will have a new ID so any actions in other life cycles that add to the converted life cycle will need to be updated.
  - The *OnBase Workflow – Life Cycles & Content Types* dashboard can help identify where updates are needed.
- References to the life cycle/queues in Unity form custom actions
  - Refer to the *OnBase SV Unity Forms – Workflow Alignment* dashboard to easily find custom actions referencing a queue.

- **Scheduler tasks** (see below)
- **Notification templates.** Templates not directly referenced by an action (ex. referenced by a property) may not be included in the copy.
- **Notification recipients.** Recipients based on “load balanced members” for the queue will need to be reassigned with a reference to the correct queue.
- **Related items**. Legacy life cycles have different options for related items/work folders. These need to be reconfigured as portfolios.
- **Filter Rules** on ad hoc tasks may not be included in the copy.
- **Reporting Dashboards/Reports** (or Workflow data providers, more specifically) will need to be reconfigured to reference the new life cycle.
    - While data is retained in the database for deleted life cycles, those deleted life cycles will not be available for selection in data provider configuration.

4. *Delete/Disable original legacy life cycle*

After testing is complete, all items are moved to the new process, and you no longer need the original as a reference (ex. for scheduler tasks), the original life cycle can be deleted.

If you prefer to keep the life cycle a bit longer, it can be disabled instead of deleted. However, it should at least be disabled when you are ready to begin using the new Unity life cycle so that new items are not added to both life cycles and users only see the one process they should be working in.



X - X - Add Campus Code ID: 501

Created 7/25/2019 10:40:32 AM (Larissa Armand - CUSYS UIS Enterprise Content Serv

Modified 9/1/2022 1:01:37 PM (Larissa Armand - CUSYS UIS Enterprise Content Servic

X - X - CC - Initial

Work Folder: <None>

Make Available In: Core-based interfaces

Organizational Chart: <None>

Calendar: <None>

☑ Display All Items when Life Cycle is Selected

Content Type: Documents

□ Unity Life Cycle

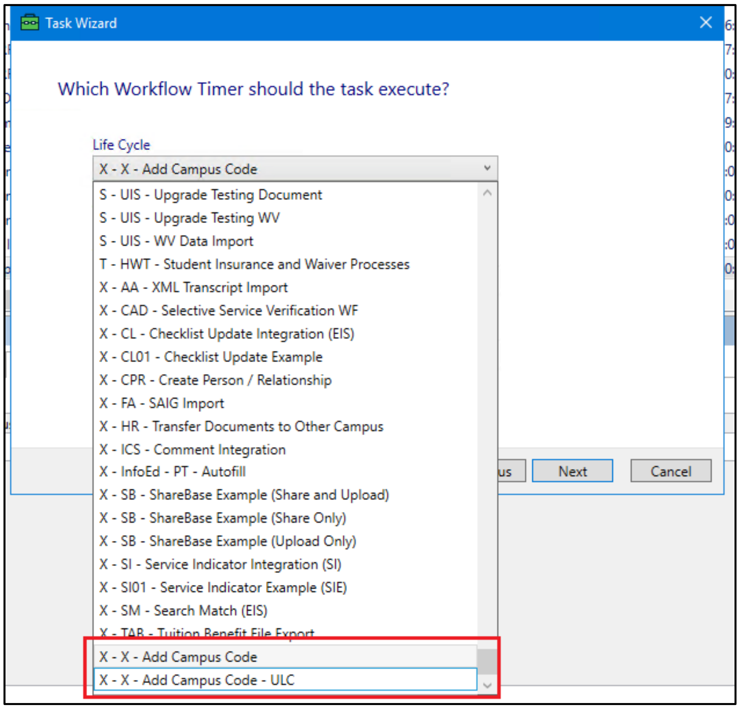
□ Disable

If any deleted documents associated with the life cycle are still in Document Maintenance, they will need to be purged before the life cycle is deleted.

Steps to Complete in Unity Management Console

When the conversion copy of a life cycle is created, this does not include any scheduler tasks to run timer work in the new life cycle. Any scheduler tasks will need to be reconfigured or recreated.

It’s easier to do this prior to removing the original life cycle, so that you can update the existing scheduler tasks to reference the new life cycle. Otherwise, you can create new tasks as usual.



Which Workflow Timer should the task execute?

Life Cycle: X - X - Add Campus Code

Task Wizard
S - UIS - Upgrade Testing Document
S - UIS - Upgrade Testing WV
S - UIS - WV Data Import
T - HWT - Student Insurance and Waiver Processes
X - AA - XML Transcript Import
X - CAD - Selective Service Verification WF
X - CL - Checklist Update Integration (EIS)
X - CL01 - Checklist Update Example
X - CPR - Create Person / Relationship
X - FA - SAIG Import
X - HR - Transfer Documents to Other Campus
X - ICS - Comment Integration
X - InfoEd - PT - Autofill
X - SB - ShareBase Example (Share and Upload)
X - SB - ShareBase Example (Share Only)
X - SB - ShareBase Example (Upload Only)
X - SI - Service Indicator Integration (SI)
X - SI01 - Service Indicator Example (SIE)
X - SM - Search Match (EIS)
X - TAB - Tuition Benefit File Export
X - X - Add Campus Code
X - X - Add Campus Code - ULC
us
Next
Cancel