



OnBase Guide - Workflow - Comment Integration

Goal: To use OnBase to create Comments in Campus Solutions using OnBase workflow

Complexity Level: Departmental Workflow Developers

2/18/2025

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Background

This process exists to create Comments on student accounts in Campus Solutions.

This guide outlines the steps performed by a common, central processing life cycle (managed by UIS) that completes the processing using a web service to update CS and the steps you'll need to incorporate into your department's life cycles to use the integration.

The basic process is:

- 1. Departmental life cycle creates a Unity form that supplies the necessary information for the comment.
- 2. The form is processed by a shared life cycle configured and maintained by UIS. A web service uses the information from the form to perform the requested action.
- 3. The departmental life cycle checks the result of the web service processing to determine if it was successful.
- 4. The form used for processing is deleted after 24 hours.

There are many options for customizing this in your life cycle, so use this guide as a starting point to build a solution that fits your department's needs.

NOTE: Web services perform updates in the Campus Solutions environment corresponding to the OnBase environment (DMODEV connects to ICSDEV, DMOTST to ICSTST, etc.). Certain conditions may need to exist in the corresponding Campus Solutions environment for successful testing.

NOTE: This process will only allow creation of comments using admin functions and categories available to the account used to create the form.

NOTE: Comments created using this web service will have a prefix of "Comment from OnBase: " added to the comment text.

Prerequisites

You will need to use OnBase Studio and be familiar with workflow design and configuration, in addition to having the necessary permissions to do so.

You will also need to be familiar with ICS comments and the admin functions and categories used by your department. Depending on the admin function, additional values may be required. See <u>Required Values</u> below.

Please reference other <u>UIS guides</u> for installation instructions and configuring each of the products. The Workflow and System Administration MRGs also provide further details. Contact <u>UIS DM Support@cu.edu</u> for assistance if needed.



Required Values

Some values are required for all comments, regardless of the admin function or category. All requests must include:

- Student ID
- Campus Code/Institution
- Comment Admin Function
- Comment Category
- Comment Text

Some admin functions require additional values in order for a comment to be created.

Admin Function = ADMA (Admissions Application)

REQUIRED VALUES	SET AS
ACAD CAREER	Keyword: Academic Career
STDNT_CAR_NBR	Keyword: Student Career Number
ADM_APPL_NBR	Property

Admin Function = ADMP (Admissions Program)

REQUIRED VALUES	SET AS
ACAD_CAREER	Keyword: Academic Career
STDNT_CAR_NBR	Keyword: Student Career Number
ADM_APPL_NBR	Property
APPL_PROG_NBR	Property

Admin Function = FINA (Financial Aid)

REQUIRED VALUES	SET AS
AID_YEAR	Keyword: Aid Year

Admin Function = FINT (Financial Aid Term)

REQUIRED VALUES	SET AS
AID_YEAR	Keyword: Aid Year
STRM	Keyword: Term Code



Admin Function = PROS (Prospect)

REQUIRED VALUES	SET AS
ACAD_CAREER	Keyword: Academic Career

Admin Function = PSSV (Prospect Self Service)

REQUIRED VALUES	SET AS
ACAD_CAREER	Keyword: Academic Career

Admin Function = RECR (Recruiters)

REQUIRED VALUES	SET AS
ACAD_CAREER	Keyword: Academic Career

Admin Function = SENR (Student Enrollment)

REQUIRED VALUES	SET AS
ACAD_CAREER	Keyword: Academic Career
STRM	Keyword: Term Code
CLASS_NBR	Keyword: Class Number

Admin Function = SFAC (Student Financials Account)

REQUIRED VALUES	SET AS
BUSINESS_UNIT	Property
ACCOUNT_NBR	Property
ACCOUNT_TERM	Keyword: Term Code

Admin Function = SFCO (Student Financials Collections)

REQUIRED VALUES	SET AS
BUSINESS_UNIT	Property
COLLECTION_ID	Property



Admin Function = SFPA (Student Financials Payments)

REQUIRED VALUES	SET AS
BUSINESS_UNIT	Property
PAYMENT_ID_NBR	Property

Admin Function = SRPG (Student Program)

REQUIRED VALUES	SET AS
ACAD_CAREER	Keyword: Academic Career
STDNT_CAR_NBR	Keyword: Student Career Number

Admin Function = STRM (Student Term)

REQUIRED VALUES	SET AS
ACAD_CAREER	Keyword: Academic Career
STRM	Keyword: Term Code

Optional Values

In addition to the required values, you can also include:

• Department ID

Steps to Complete in OnBase Studio

OnBase Studio is the tool where you can create Workflow life cycles, queues, tasks, actions, timers and notifications for your business processes.

The following steps must be configured to use the comment integration:

- 1. Create the Comment Integration processing form.
 - Add a "Create Form" action and choose the S UIS ICS Comment Integration form.



tion Type
reate Form 🔹 🕢
General Inherit Keywords Documentation
Form Type
S - UIS - ICS Comment Integration V

• Inherit Keywords from the originating document to the form where applicable. At minimum, this should generally include the Student ID and Campus Code.

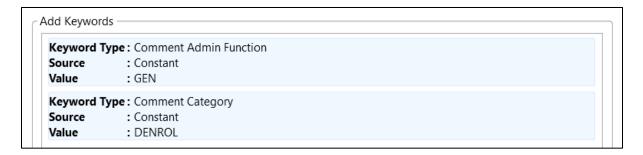
Action Type
Create Form
General Inherit Keywords Documentation
Inherit Keywords
O Inherit All
Inherit Selected Configure
✓ Fill Document Handle Keyword(s)
Inherited Keyword Types ×
Find
Name
Campus Code
Student ID

• Select the option to "Fill Document Handle Keyword(s)." This is needed to identify the related Comment Integration form to check the result.

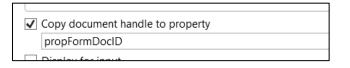
REQUIRED: Create SI Add form	ID: 23967
Created 11/20/2019 14:56:06 (Larissa Armand - CUSYS OnBase Admin) Modified 11/20/2019 14:56:06 (Larissa Armand - CUSYS OnBase Admin)	
Action Type	
Create Form	- O
General Inherit Keywords Documentation	
✓ Inherit Keywords	
Inherit All	
Inherit Selected Configure	
Fill Document Handle Keyword(s)	

• Map any other values that can be stored as keywords on the Comment Integration form.

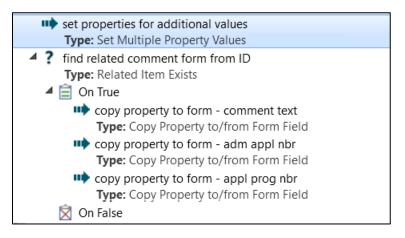




• The "copy document handle to property" option can also be helpful for step 2 if additional property values are needed.



2. If you are using an admin function that requires additional values, complete these steps. Otherwise, skip to #3.



- Set additional property values. Set a property value (using any action type, such as "Set Multiple Property Values", "Set Property Value", "Run Unity Script", etc.) for each of the additional required values. Make sure your property bag usage is consistent throughout the actions and rules using the property values.
- Find the related comment integration form.
 - i. Use a "Related Item Exists" rule.
 - ii. Check the option for "use related item for tasks" on the rule so that your On True task list is performed on the Comment Integration form, not your primary document.
 - iii. The relationship can be mapped using the inherited document handle value, or if you saved the form's document handle to a property in the action creating the form, you can use that property value.
- Add additional property values to the Comment Integration form.



i. Use a "Copy property to/from form field" action for each property value to set the appropriate value on the form.

Copy Property to/from Form Field	▼
General Documentation	
Property Name	
propCommText	
Form Type	
S - UIS - ICS Comment Integration	¥
Form Field Name	
textbox_commentText	~
Copy To Form Field	
Copy From Form Field	

- 3. Check for response.
 - It is recommended this is done using a timer to allow the web service time to process (this should usually take less than a minute). The processing form is only kept for 24 hours, so don't wait longer than that to check the response.
 - A successful placement/release will result in the response of "SUCCS".
 - Any non-successful transaction will result in a response starting with ERROR, with more details about the issue.
 - If no response has been recorded, the form will be reprocessed after 15 minutes.
 - The response is stored as a keyword value on the SI form, so you'll need to check the value on that related document from your life cycle.



Rule Type Check Keyword Value General Related Documentation		
Target Related Item Located By Ad Hoc Portfolio Relation Source Content Type - Documents	en in the Content Type	
Find the related document by ID given in the Content Type Keyword Type Web Service Response Currency Format		
Operator	~	
= Compare To ✓ Allow Wildcards SUCSS*		

Processing Life Cycle

The web service processing is completed by the **X** - **ICS** - **Web Service Processing** life cycle. This life cycle can only be modified by UIS. Contact <u>UIS_DM_Support@cu.edu</u> if you need assistance or if modification may be necessary.

When forms are created in the **S** - **UIS** - **ICS Comment Integration Form** document type, they are added to this life cycle for processing.

- 1. Forms will be validated to confirm all required values are present and a valid combination of Institution, Admin Function and Comment Category are being used. Any issues will be recorded as the Web Service Response and those forms will be moved to the Exceptions queue.
- 2. Once all values are set and validated, the web service will be run according to which environment is in use.
- 3. The response will appear on the processing form and be saved as a keyword on the processing form so that it can be checked in a related item rule from the primary document.



- 4. A timer checks for items that have been in the queue longer than 15 minutes with no response, and they will be reprocessed.
- 5. Forms will be deleted after 24 hours unless they have not received a response.

Potential Responses

This may not be a comprehensive list, but outlines some potential responses.

Response Message	Description
SUCCS: COMMENT ADDED	If the comment is successfully updated
ERROR: INVALID INSTITUTION, ADMIN	Indicates the combination of values used for
FUNCTION, AND/OR CATEGORY	the form does not exist in Campus Solutions.
ERROR: ADMIN FUNCTION NOT	Will appear if an admin function is used but
CONFIGURED FOR ONBASE	has not been configured for use in this OnBase
PROCESSING	process. Contact UIS_DM_Support@cu.edu
	for assistance.
ERROR: NO ACCESS TO UPDATE	Indicates the account used does not have
COMMENT CATEGORY	sufficient privileges to create the comment as
	requested
ERROR: VALIDATION FAILED FOR	Indicates an error with validation for the
FIELD(S)	comment category or admin function. For
	example, students must be activated in the aid
	year for any comments referencing an aid year
ERROR: MISSING ONE OR MORE	Required values are not set on processing
REQUIRED VALUES	form
ERROR: HTTP Status = *	Indicates issue accessing web service
ERROR: Service Unavailable/Inactive	Usually due to application maintenance

Testing the Solution

It is important to thoroughly test your solution prior to migration to production. Testing should not be done in production since these processes will make updates to student records.

Certain conditions may need to exist in the corresponding Campus Solutions environment for successful testing.

Item Generators can be configured to create documents (or other items) in the desired document types and with the desired keyword values. These let you test life cycles in a variety of ways and even specify keyword and property values and the



starting queue and entry date. Refer to the Studio MRG for more information on Item Generators.



