



University of Colorado

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OnBase Guide - Workflow - Comment Integration

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

Complexity Level: Departmental Workflow Developers

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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 processing life cycle 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 purged after 24 hours.

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

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

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 [Required Values](#) below.

Please reference other [UIS guides](#) for installation instructions and configuring each of the products. The Workflow and System Administration MRGs also provide further details. Contact UIS_DM_Support@cu.edu 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
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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:

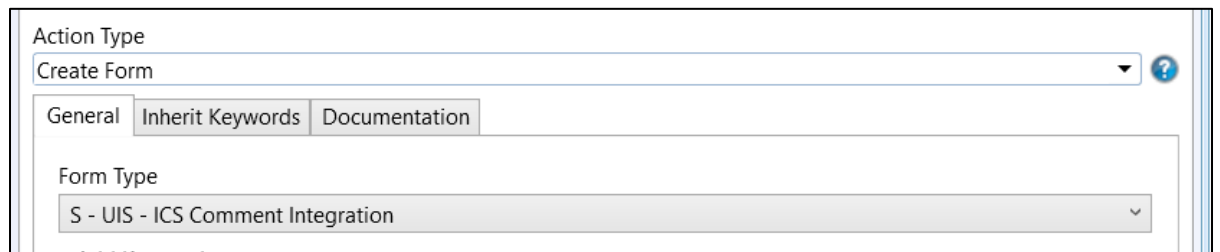
- Department ID

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.

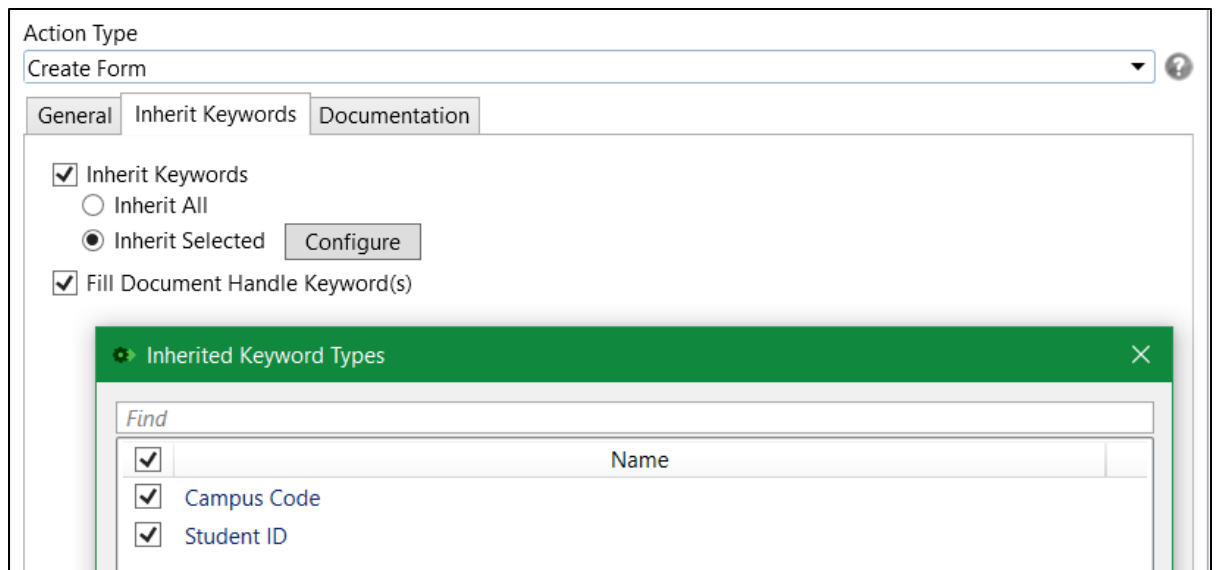
The following steps must be configured to use the comment integration:

1. Create the Comment Integration processing form.
 - Add a “**Create Form**” action and choose the **S - UIS – ICS Comment Integration** form.

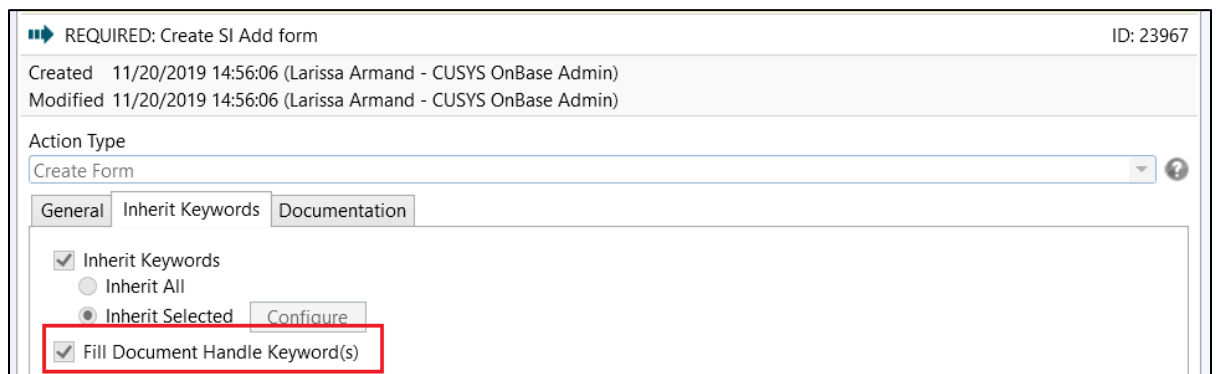


The screenshot shows a configuration window for an action. The 'Action Type' dropdown is set to 'Create Form'. Below it are three tabs: 'General', 'Inherit Keywords', and 'Documentation'. The 'Form Type' dropdown is set to 'S - UIS - ICS Comment Integration'.

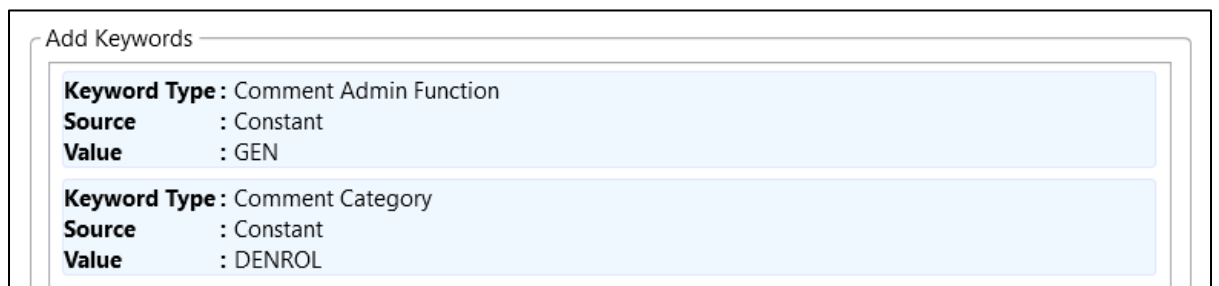
- Inherit Keywords from the originating document to the form where applicable. At minimum, this should generally include the Student ID and Campus Code.



- Select the option to “**Fill Document Handle Keyword(s).**” This is needed to identify the related Comment Integration form to check the result.



- 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.

<input checked="" type="checkbox"/>	Copy document handle to property
	propFormDocID
<input type="checkbox"/>	Display for input

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

▶▶▶	set properties for additional values Type: Set Multiple Property Values
▲ ?	find related comment form from ID Type: Related Item Exists
▲	On True
▶▶▶	copy property to form - comment text Type: Copy Property to/from Form Field
▶▶▶	copy property to form - adm appl nbr Type: Copy Property to/from Form Field
▶▶▶	copy property to form - appl prog nbr Type: Copy Property to/from Form Field
☒	On False

- 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.
 - Use a “Related Item Exists” rule.
 - 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.
 - 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.
 - Use a “Copy property to/from form field” action for each property value to set the appropriate value on the form.

The screenshot shows a configuration window titled 'Action Type'. At the top, there is a dropdown menu set to 'Copy Property to/from Form Field' with a help icon to its right. Below this are two tabs: 'General' (selected) and 'Documentation'. The 'General' tab contains the following fields:

- Property Name:** A text input field containing 'propCommText'.
- Form Type:** A dropdown menu set to 'S - UIS - ICS Comment Integration'.
- Form Field Name:** A dropdown menu set to 'textbox_commentText'.
- Copy To Form Field:** A radio button that is selected.
- Copy From Form Field:** An unselected radio button.

3. Check for response.

- It is recommended this is done using a timer to allow the web service time to process (this should 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 "SUCCESS: COMMENT ADDED".
- Any non-successful transaction will result in a response starting with ERROR, with more details about the issue. For example:
 - i. *ERROR: INVALID INSTITUTION, ADMIN FUNCTION, AND/OR CATEGORY* indicates the combination of values used for the form does not exist in Campus Solutions.
 - ii. *ERROR: ADMIN FUNCTION NOT CONFIGURED FOR ONBASE PROCESSING* will appear if an admin function is used but has not been configured for use in this OnBase process. Contact UIS_DM_Support@cu.edu for assistance.
 - iii. *ERROR: NO ACCESS TO UPDATE COMMENT CATEGORY _____* indicates the account used does not have sufficient privileges to create the comment as requested.
 - iv. *ERROR: VALIDATION FAILED FOR FIELD(S) _____* indicates an error with validation for the comment category or admin function. For example, students must be activated in the aid year for any comments referencing an aid year.
- If no response has been recorded, the form will be reprocessed after 30 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

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 - Comment Integration** life cycle. This life cycle can only be modified by UIS. Contact UIS_DM_Support@cu.edu 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. Every 30 minutes, 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 purged after 24 hours unless they have not received a response.