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OnBase Guide - Workflow – “Export to Network Location” locations

Goal: To export to locations where workflow files can be saved using the Export to Network Location action.

Complexity Level: Departmental Workflow Developers

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Background

One of the tasks in OnBase Workflow is called 'Export to Network Location', this allows you to export data from OnBase App Servers **to a location inside of UIS** that can be picked up by PeopleSoft and other systems for processing. This guide provides some information on standard locations in each environment.

The 'Export to Network Location' action can only write to locations accessible to the OnBase servers, so this does not include your campus or department's file shares or individual workstations.

Prerequisites

You must have OnBase Studio installed and know how to configure a life cycle. Refer to the [OnBase Client Guides](#) for instructions on installation and to the Workflow MRG for more details as necessary. Contact UIS_DM_Support@cu.edu for assistance if needed.

Usage

There are a few different ways to approach the 'Export to Network Location' action. This guide is not designed to teach you all of those methods, but to just give an overview. If you wish to learn more of the details regarding 'Export to Network Location', please review the OnBase Workflow MRG.

For example, while setting up the 'Export to Network Location', you could:

- Use a single static filename which would contain many rows of data being exported.
- Create dynamic individual file names based upon Properties and Keywords with only a single row of data.

Either way, you invoke the workflow process by creating an Action and using the 'Export to Network Location' action type. Populate the Network Location with one of the below [standard OnBase Export Locations paths](#).

Please keep in mind that actions where these file path locations are hardcoded in the action will have to be **manually modified** after migrating the life cycle to another environment or after an environment refresh. As a result, we recommend you use the script maintained by UIS to export files to the applicable file path for the

environment for either ICS or HCM. More details and an example are available in the [Get Environment's Network Location Using Script](#) section.

The screenshot shows a software dialog box titled "Action Type" with a dropdown menu set to "Export to Network Location". Below the title bar are four tabs: "General", "Document", "Index File", and "Documentation", with "General" selected. The "Source" section has a dropdown menu set to "Current Document". The "Export" section has a dropdown menu set to "Index File Only". Under "Network Location", there are two radio buttons: "Specify Network Location" (selected) and "Get Network Location from Property". The "Specify Network Location" option has a text field containing the path "\\pnfs-ppsfiledir-papp.prod.cu.edu\PPSFILEDIR\ics\prd\onbase" and a "Browse" button. The "Get Network Location from Property" option has an empty text field. The "Compressed File Properties" section has a checkbox for "Compress Contents" which is unchecked, and a text field for "Compressed File Name" which is empty. At the bottom, there is a checked checkbox for "Break Processing on Failure" and a small blue information icon.

Once you've populated the location and determined the filename, you then have to configure what data you wish to export into your file. These can be Keywords, Properties and/or Constant values.

Also, you'll have to define what types of separators you'll need between the values. This is configured on the Document and Index File tabs. Refer to the Workflow MRG for more details.

Action Type
Export to Network Location

General Document **Index File** Documentation

Index File Name

Specify Index File Name

Get Index File Name from Property
SFileName

Index File Properties

Create New Index File

Append to Existing Index File

Create new index file if it does not exist

Field Configuration

Order	Field	Value
1	Keyword Type	Student ID

Configure

Field Delimiters
None

Primary Field Separators
Newline

Secondary Field Separators
No Separator

Use Session Property Bag

Disable Enable Debug Breakpoint Log Execution

Action Type
Export to Network Location

General Document **Index File** Documentation

Document Name

Use Document Handle

Get Document Name from Property

File Format

Native Format

Constant value

Property Name

Page Options

All Pages

Page Range

Note Options

Annotation and/or Note Icon On Document

Note Text On Document

It is recommended that you select the “Break processing on Failure” option when using the Export to Network Location action so that if the export fails for any reason, the documents will not proceed through the workflow until the issue is corrected. Timers can be used to identify items stuck in the queue, and once the problem is corrected, the export can be initiated again on the documents since they are still in the queue.

NOTE: If your data is destined to be used with PeopleSoft, additional work may be necessary to setup the intake processes on the UIS batch scheduler (UC4) and PeopleSoft itself. This guide only covers the process of creating and exporting the file from OnBase.

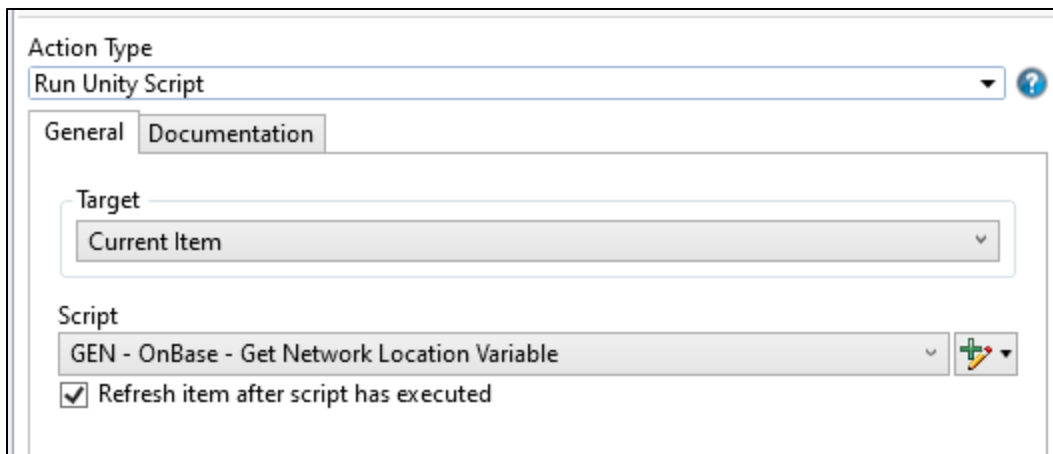
Get Environment’s Network Location Using Script

This method allows for the same configuration to be used in all environments while still exporting the file to the correct location in the target system (ICS or HCM) based on the OnBase environment being used.

1. Set/clear property values. Use the **Set Multiple Property Values** action to set the following property values. Throughout, make sure the property bag being used is consistent.
 - a. networkLocation = blank
 - b. targetSystem = “ICS” or “HCM” (depending on where you are exporting)

The screenshot shows a configuration window for the 'Set Multiple Property Values' action. The 'Action Type' dropdown is set to 'Set Multiple Property Values'. Below this, there are two tabs: 'General' and 'Documentation'. The 'General' tab is active, displaying a list of properties to be set. The first property is 'networkLocation', with a value of 'Constant value' and 'Multiple' set to 'No'. The second property is 'targetSystem', with a value of 'ICS (Constant value)' and 'Multiple' set to 'No'.

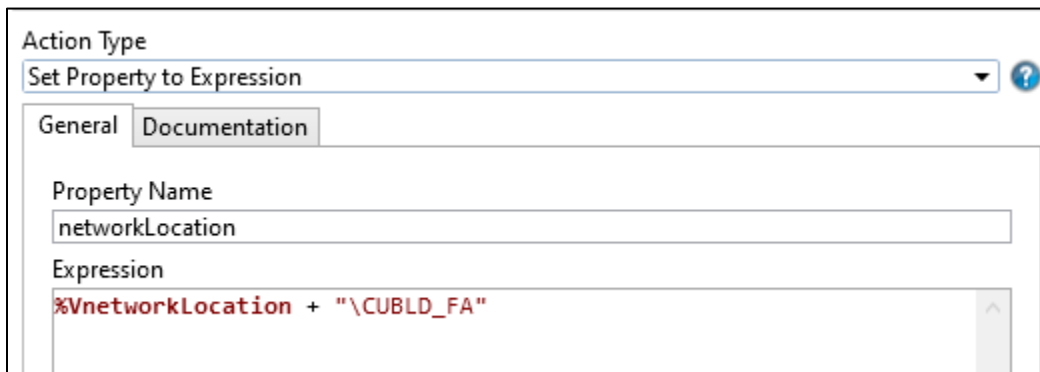
2. Run the **GEN - OnBase - Get Network Location Variable** Unity script to get the network location value. Use the **Run Unity Script** action and select the option to refresh the item after the script is run.



3. OPTIONAL: If you are exporting to a subfolder, use the **Set Property to Expression** action to add the subfolder to the file path returned by the Unity script. This is done by concatenating the subfolder to the file path property value, ex: %VnetworkLocation + "\CUBLD_FA".

The path returned by the script will not include a trailing backslash (\) so you will need to add it if using a subfolder.

This workflow action cannot create subfolders, so please confirm that any subfolders you are exporting to already exist and have the correct privileges.



4. Configure the **Export to Network Location** action as desired. Use the "Get Network Location from Property" option and use the "networkLocation" property.

We recommend you use the "Break Processing on Failure" option.

Action Type
Export to Network Location

General | Document | Index File | Documentation

Source
Current Item

Export
Document Only

Network Location
 Specify Network Location
 Browse
 Get Network Location from Property

Compressed File Properties
 Compress Contents
 Compressed File Name

Break Processing on Failure

Standard OnBase Export Locations:

ICS

DEV	\\nas-s3-dapp.dev.cu.edu\DPSFILEDIR\ics\icsdev\onbase
TST	\\nas-s3-qapp.qa.cu.edu\QPSFILEDIR\ics\icstst\onbase
STG	\\nas-s3-qapp.qa.cu.edu\QPSFILEDIR\ics\icsstg\onbase
PRD	\\nas-s3-papp.prod.cu.edu\PPSFILEDIR\ics\icsprd\onbase

NOTE: Files are only retained in these ICS folders for 35 days since the last modification. After that time, the folders will be preserved but files will be purged.

HCM

DEV	\\nas-s31-dapp.dev.cu.edu\DPSDATA\dpscusthome\hcm\hcmdev\files\onbase
TST	\\nas-s31-qapp.qa.cu.edu\QPSDATA\qpscusthome\hcm\hcmtst\files\onbase
STG	\\nas-s31-qapp.qa.cu.edu\QPSDATA\qpscusthome\hcm\hcmstg\files\onbase
PRD	\\nas-s3-papp.prod.cu.edu\PPSDATA\ppscusthome\hcm\hcmprd\files\onbase



Tips

Copy Property to/from Unity Form Field

One common use case for using the 'Export to Network Location' action is with Unity Form fields. This allows you to collect the data on Unity forms and save them off as a CSV.

To use 'Copy Property to/from Unity Form Field' assign a Property name in your workflow for each Unity Form field you want to read the contents of. Take care to define the property bag correctly and reference it consistently, where:

- A Session Property exists for the life of the user's session.
- A Scoped Property exists for the duration of the Workflow task.
- A Persistent Property exists as long as that item is in Workflow.

It's recommended to set these as a Scoped Property, that way they are cleared when the Workflow Task you will be using to build your data file is completed.

After using the Copy Property to/from Unity Form Field to 'read' all the Unity Form XML fields into properties (variables) you can then use the Export to Network Location action to write those values out to a text file.

Date Formatting

If you are using an index file and you want to include the date as part of the file name, you can't use the normal date token (%D1) because it formats it with "/" which the network then thinks is part of the file path, causing the export to fail. To get around this, set the index file name to a property using the following example expression:

```
"GINST_" + FormatDateTime(now();"yyyy-MM-dd") + ".txt"
```

This produces the file named: GINST_2018-08-02.txt.

The expression above is a good example for the syntax to get a two-digit month and day which matters when trying to sort the files by name.