OnBase Guide - Workflow - ICS Student Group Integration

Goal: To use OnBase to add or remove Student Group assignments in Campus Solutions using OnBase workflow

Complexity Level: Departmental Workflow Developers

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Background

This process exists to update Student Groups 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 update.
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.

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 student groups used by your department.

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.
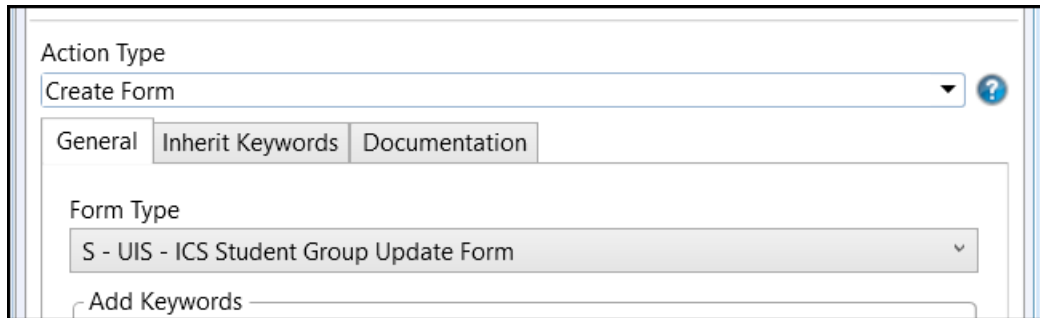
Required and Optional Values

1. Required Values are:
   - Student ID/CS Emplid
   - Institution/Campus Code
   - Student Group
   - Effective Date
   - Effective Status
     i. I – Inactive
     ii. A – Active
2. Optional Values are:
   - Comments

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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.
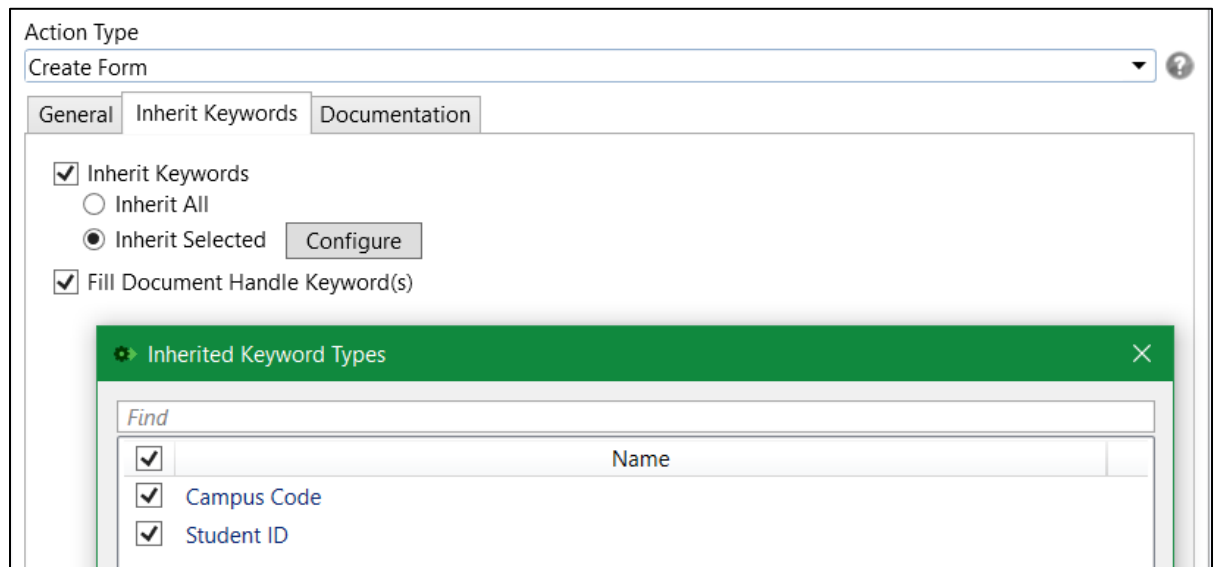
The following steps must be configured to use the student group integration:

3. Create the Comment Integration processing form.
    - Add a "**Create Form**" action and choose the **S - UIS – ICS Student Group Update Form** form type.

    - 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.

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- Map any other values that can be stored as keywords on the student group update form, such as the student group value.

- If needed, you can display the form to a user in user interaction to collect additional values.
- Make sure all required values are set.

4. 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 "*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 30 minutes.
   - The response is stored as a keyword value on the form, so you'll need to check the value on that related document from your life cycle.

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Processing Life Cycle

The web service processing is completed by the **X - ICS - Student Group 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 **X - ICS - Student Group Integration** 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.

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5. Forms will be purged 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	If the message is successfully updated
ERROR: Student Group not updated	Occurs if there is error while updating STDNT_GRPS table
ERROR: Student Group Comment not updated	Occurs if there is error while updating STDNT_GRPS table
ERROR: Blank effdt	Occurs when there is a blank effective date in the message
ERROR: Student group not found	Occurs when there is no student group setup added on the Campus solutions
ERROR: Operator id does not exist for the student	Occurs when there is no Operator id associated for the student in the Campus solutions
ERROR: Emplid does not exist	Occurs when there is no Emplid in the message
ERROR: invalid values in message	Occurs if any prompt validations fail
ERROR: CU_ONBASE_STUDENTGROUP_SYNC Service is inactive	Occurs if the service operation is inactive; workflow will reattempt processing
ERROR: MISSING ONE OR MORE REQUIRED VALUES	Required values are not set on processing 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

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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.

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