OnBase Guide – Workflow – DocPop and WorkflowPop Notifications

Goal: To configure workflow notifications using DocPop or WorkflowPop tokens to provide the recipient with a link to the document

Complexity Level: Departmental Workflow Developers

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Background

DocPop allows users to view existing documents using a simplified Web Client viewer interface, without any extra OnBase functionality or access. This can be useful or necessary in a workflow process to allow individuals the ability to see the document in question.

Similarly, WorkflowPop can be used to direct a user to a workflow queue in the same web viewer to assist them in processing items.

NOTES:
- The user receiving a DocPop or WorkflowPop link will need to authenticate to their own OnBase account.
  - o If the user receiving the DocPop notification does not have access to the document type, they will not be able to see the document.
  - o If the user receiving the WorkflowPop notification does not have access to the life cycle/queue, they will not be able to see the content.
- Accessing these URLs will require a connection to a campus network (including by VPN), just like accessing the clients regularly.
- UnityPop can be used to direct users to content within the Unity client; this is a separate topic not covered in this guide.
- FormPop provides similar functionality for OnBase e-forms, please refer to the FormPop guide for more information.
- DocPop can also be used to return the results of a custom query. This is how Related Content from PeopleSoft applications works.

Prerequisites

To configure these notifications, you must have OnBase Studio installed and be familiar with general workflow/notification configuration. Refer to the OnBase Client Guides for installation instructions.

Resources

For more information, refer to:
- The DocPop MRG (includes information on FormPop and WorkflowPop too)
- The Pop Integrations topic from OnBase Integrations Overview
- The Workflow MRG

If you need assistance, please contact UIS_DM_SUPPORT@cu.edu.

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## OnBase Studio - Create the Workflow Notification

1. Log into OnBase Studio. You will need to be in the *Functional - Developer - Workflow* group.

2. Click on the **Notifications** tab within the desired repository.
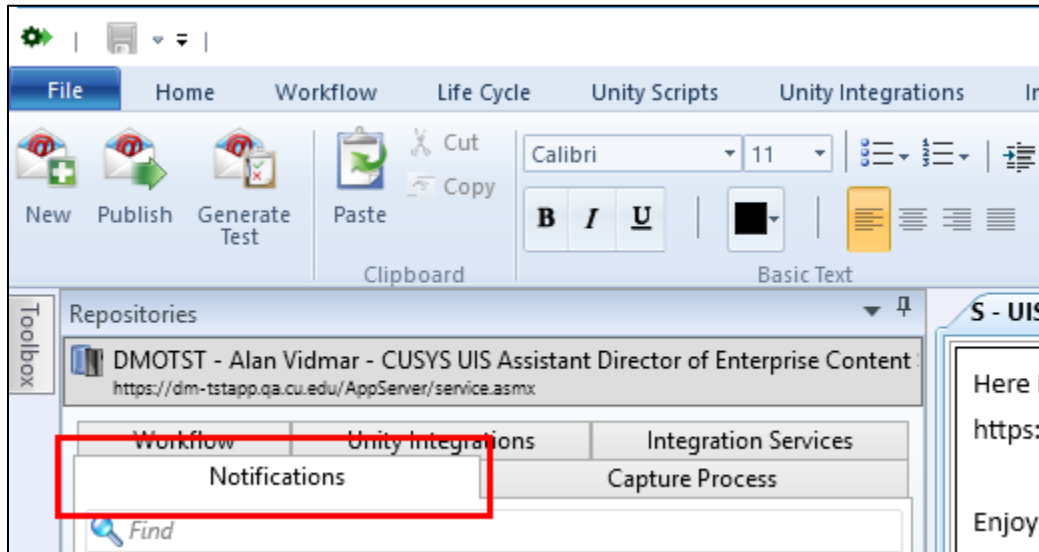
3. Either create a new notification or navigate to the desired notification if it already exists and check it out. Refer to the Workflow MRG for more information if needed.

4. Click in body text of your notification to place the cursor where you want the Pop URL to be.

5. Click on the **Token** button on the Notification tab of the menu. Choose **DocPop** or **WorkflowPop** depending on the type of URL you want to insert.

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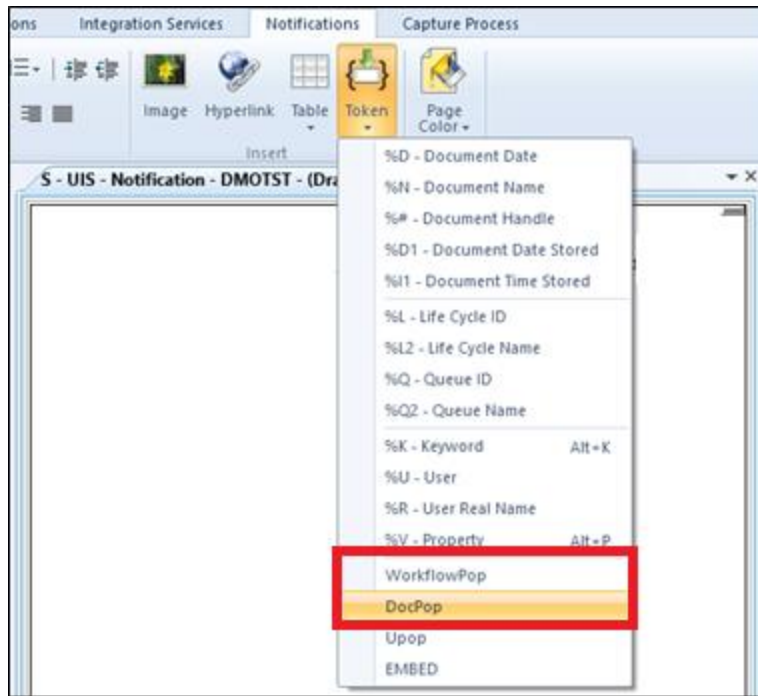
6. You will be presented with a URL dialog that you can fill in with the OnBase environment information. Always make sure that the **Protocol** is changed to https.
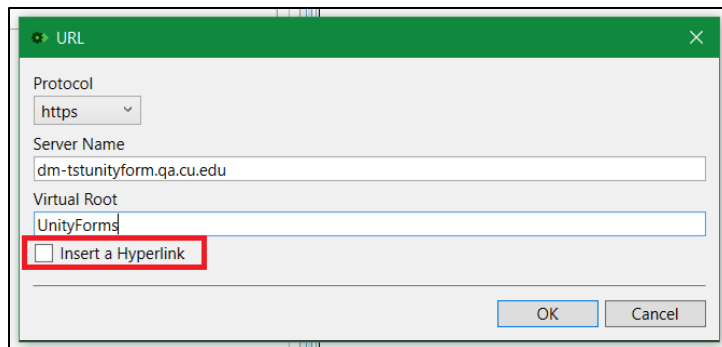

7. These are the values that should be used depending on the OnBase environment.

|	SERVER	VIRTUAL ROOT
DEV	dm-dev.dev.cu.edu	AppNet
TST	dm-tst.qa.cu.edu	AppNet
STG	dm-stg.qa.cu.edu	AppNet
PRD	dm.prod.cu.edu	AppNet

Click on **OK** to have the URL placed into your notification template window.

8. This is an example of what the notification URL looks like in a template for DMOTST. Make sure not to modify the URL in the notification template.

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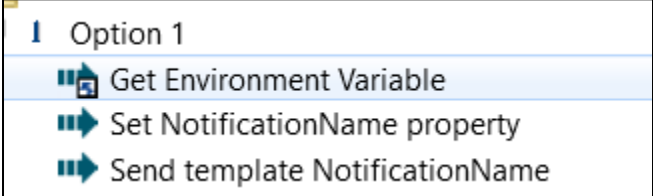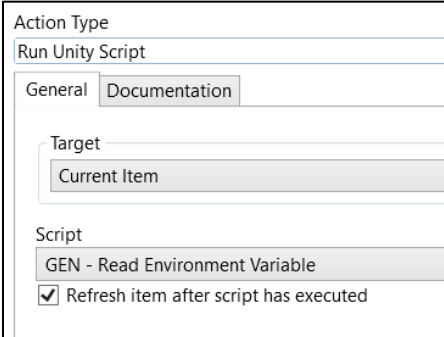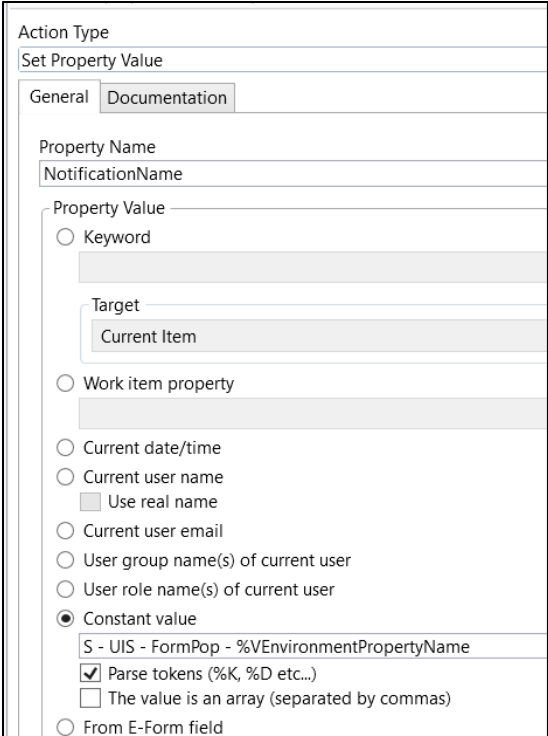
- DocPop
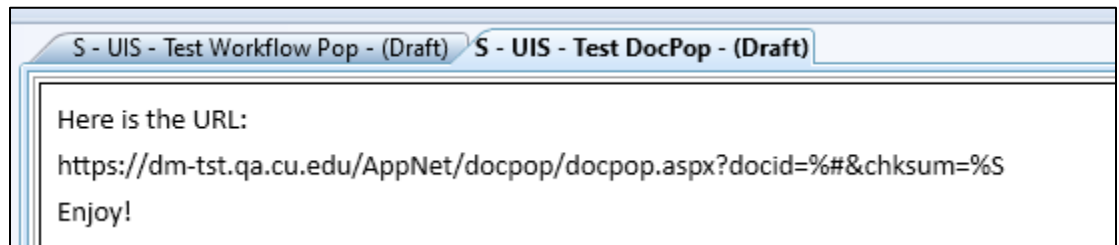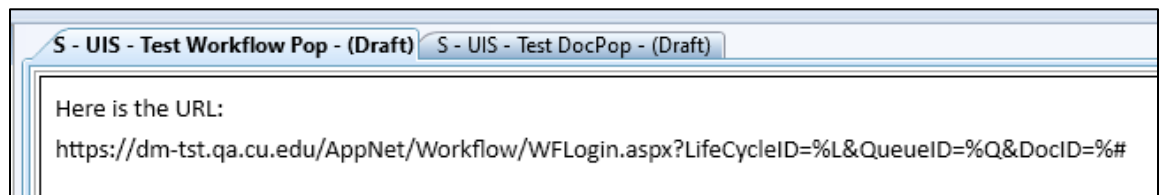
- WorkflowPop

    i. If you'd like to use a WorkflowPop link to direct the user to the queue and not to a specific document in the queue, you can delete the last portion of this URL ("&DocID=%#").

    ii. If you'd like the user to only see the specific document triggering the notification (and not be able to then navigate to other documents in the queue), you can add "hideLCQ=true" to the URL.

9. When creating a notification using a FormPop integration, you need to hardcode the server URL for the OnBase environment. Because of this, it's recommended that you create separate notification templates for each OnBase environment and send the correct one based upon the current environment variable.

   Otherwise, you will need to update or recreate the URL in your notification template(s) after migrating the notification to a different environment.
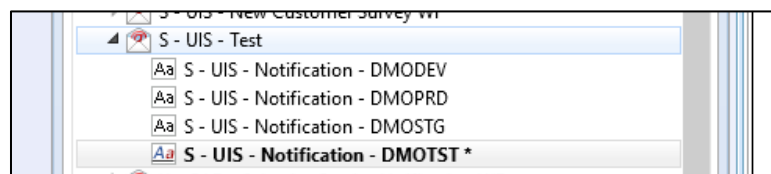
See the OnBase Guide - Unity Script - How to use the Read Environment Variable Script guide for more information on how to setup and determine the OnBase environment.

If you are using the script, your steps should look like:

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| **Description** | ```
1  Option 1
      ■▣ Get Environment Variable
      ■▶ Set NotificationName property
      ■▶ Send template NotificationName
``` |
| **Action: Run Unity Script**
Get the environment variable | Action Type
Run Unity Script

General \| Documentation

Target
Current Item

Script
GEN - Read Environment Variable
☑ Refresh item after script has executed |
| **Action: Set Property Value**
Set a property value to reference the correct notification template | Action Type
Set Property Value

General \| Documentation

Property Name
NotificationName

Property Value
○ Keyword

   Target
   Current Item

○ Work item property

○ Current date/time
○ Current user name
   ☐ Use real name
○ Current user email
○ User group name(s) of current user
○ User role name(s) of current user
◉ Constant value
   S - UIS - FormPop - %VEnvironmentPropertyName
   ☑ Parse tokens (%K, %D etc...)
   ☐ The value is an array (separated by commas)
○ From E-Form field |

| Action: Send Notification
Send the notification, with the template determined based on the property value | Action Type
Send Notification ▾ ❓
General Tracking Documentation

Attachment
None ⌄

Notification
⌄ ➕▾
Do Not Show Global Notifications ☐
☑ Get Notification from Property
NotificationName
Priority
Normal ⌄

Sender Address
○ Use the distribution services default address
○ Use the user's email address
◉ Use the following address
sender@cu.edu
○ Use address from property |

-OR-

| Description | 2 Option 2
🖥 Get Environment Variable
▲ ❓ is environment DMOPRD?
  ▲ 📋 On True
    ➡ Send template DMOPRD
  ❌ On False
▲ ❓ is environment DMOSTG?
  ▲ 📋 On True
    ➡ Send template DMOSTG
  ❌ On False
▲ ❓ is environment DMOTST?
  ▲ 📋 On True
    ➡ Send template DMOTST
  ❌ On False
▲ ❓ is environment DMODEV?
  ▲ 📋 On True
    ➡ Send template DMODEV
  ❌ On False | |
| **Action: Run Unity Script**
Get the environment variable | Action Type
Run Unity Script
General Documentation

Target
Current Item

Script
GEN - Read Environment Variable
☑ Refresh item after script has executed | |

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Rule: Check Property Value Check if DMOPRD	Rule Type Check Property Value General | Documentation Property Name EnvironmentPropertyName Operator Type = ☐ Case insensitive Compare To ⓘ All values in the property will Keyword Type <None> Constant value DMOPRD
On True: Send Notification Send PRD version of template	Action Type Send Notification ▼ ❓ General | Tracking | Documentation Attachment None ˅ Notification S - UIS - FormPop - DMOPRD ˅ ✚▾ Do Not Show Global Notifications ☑ ☐ Get Notification from Property
Rule: Check Property Value Check if DMOSTG	Rule Type Check Property Value General | Documentation Property Name EnvironmentPropertyName Operator Type = ☐ Case insensitive Compare To ⓘ All values in the property will be compar Keyword Type <None> Constant value DMOSTG
On True: Send Notification Send STG version of template	Action Type Send Notification ▼ ❓ General | Tracking | Documentation Attachment None ˅ Notification S - UIS - FormPop - DMOSTG ˅ ✚▾ Do Not Show Global Notifications ☑

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Rule: Check Property Value Check if DMOTST	Rule Type Check Property Value General | Documentation Property Name EnvironmentPropertyName Operator Type = ☐ Case insensitive Compare To ⓘ All values in the property will be co Keyword Type \<None> Constant value DMOTST
On True: Send Notification Send TST version of template	Action Type Send Notification　▾ ❓ General | Tracking | Documentation Attachment None　⌄ Notification S - UIS - FormPop - DMOTST　⌄ ➕▾ Do Not Show Global Notifications ☑
Rule: Check Property Value Check if DMODEV	Rule Type Check Property Value General | Documentation Property Name EnvironmentPropertyName Operator Type = ☐ Case insensitive Compare To ⓘ All values in the property will be cc Keyword Type \<None> Constant value DMODEV
On True: Send Notification Send DEV version of template	Action Type Send Notification　▾ ❓ General | Tracking | Documentation Attachment None　⌄ Notification S - UIS - FormPop - DMODEV　⌄ ➕▾

Testing

You will want to test these notifications to make sure the URL is accessible and the process functions as expected.

Refer to the [handbook section on workflow notifications](#) for more information about testing workflow notifications.

You won't be able to use the **Generate Test** button on the Notification tab in Studio as the docID and checksum/life cycle ID/queue ID portions of the URL won't generate unless real content is used to populate them when sending the notification.

Instead, use the **Item Generators** on the Home tab in Studio to create test content. Refer to the Studio MRG for more information on using Item Generators.