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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 an existing document

Complexity Level: Departmental Workflow Developers

1/6/2025

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Background

This guide covers the process of setting up Workflow notification templates to include a DocPop or WorkflowPop URL to provide the recipient of the notification with a link directly to an existing document.

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.
 - If the user receiving the DocPop notification does not have access to the document type, they will not be able to see the document.
 - 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.

Environment Usage

Different server address values are used for each of our OnBase environments. The Pop URL created and inserted into a notification will only work for the environment referenced in the URL.

This can pose an issue for testing, migrating, and refreshing amongst different environments so takes some additional consideration and configuration. However with a little extra work up front, it is possible to have configuration that will work in any environment with no additional maintenance/adjustments between environments.

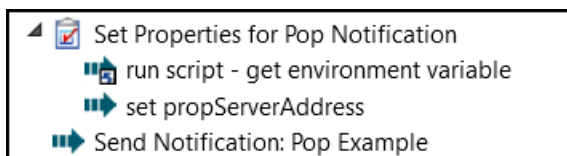
One option (previously recommended) is to have a separate template per environment and use rules/actions to send the template that corresponds to the current environment. The downside to this approach is having to create and maintain 4x as many templates and when testing in non-production, you aren't testing the template that will actually be used which can lead to issues.

Our current recommendation (outlined in this guide) is to substitute the server address value in the URL with a property value, so that the value can be set dynamically.

Either approach will require using a script to determine the current OnBase environment. See the [OnBase Guide - Unity Script - How to use the Read Environment Variable Script](#) guide for more information on how to use this script to determine the OnBase environment.

OnBase Studio - Workflow Configuration

You'll need to ensure the environment property value is set prior to sending any notification using DocPop/WorkflowPop. Since there are a couple steps, it's recommended you use a task list for consistency and ease of maintenance.



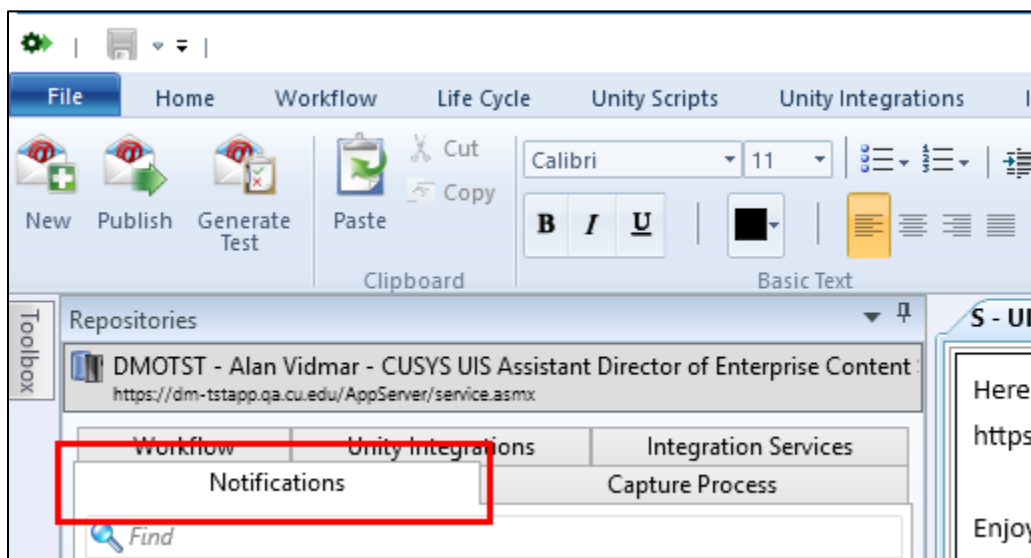
1. Get the value of EnvironmentPropertyName using the script.
 - a. Action Type: Run Unity Script
 - b. Script name: GEN – OnBase – Read Environment Variable
2. Set the server address value based on the EnvironmentPropertyName value.
 - a. Action Type: Set property to expression
 - b. This is where you'll use the values from the section below.
 - c. Expression, in this example property is called propServerAddress:

```
iif(%VEnvironmentPropertyName = "DMOPRD";"dm.prod.cu.edu";
iif(%VEnvironmentPropertyName = "DMOSTG";"dm-stg.qa.cu.edu";
iif(%VEnvironmentPropertyName = "DMOTST";"dm-tst.qa.cu.edu";
iif(%VEnvironmentPropertyName = "DMODEV";"dm-dev.dev.cu.edu";
"")))))
```

3. Send the notification.
 - a. Action Type: Send Notification
 - b. The template configuration below needs to be completed, with the template published to be available for selection.
 - c. Make sure you are using the appropriate property bag to have the property value for the server address (and any other property values) filled into the template.

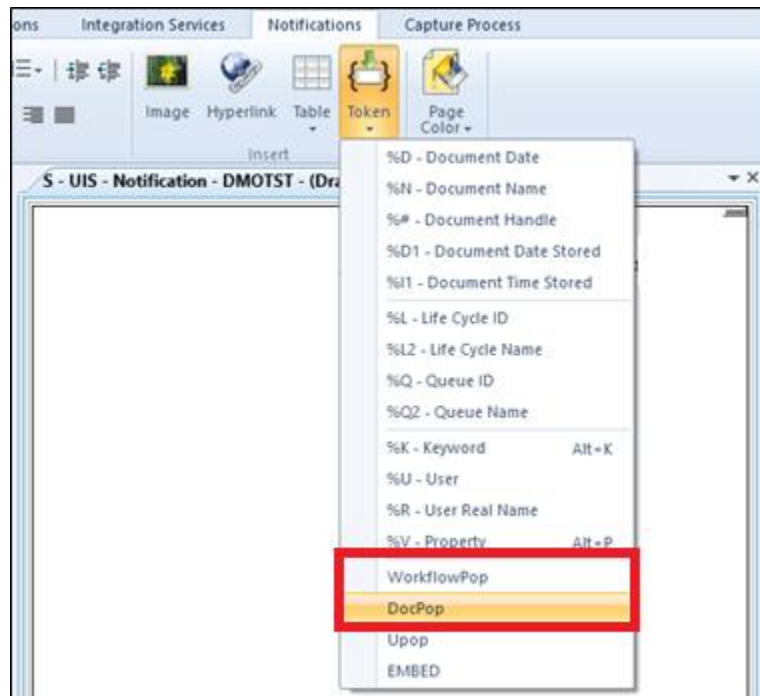
OnBase Studio – Notification Template Configuration

1. Click on the **Notifications** tab within the desired repository.

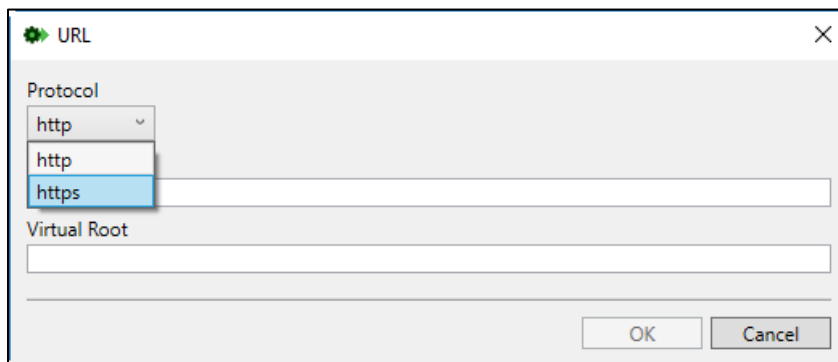


2. Either create a new notification or navigate to the desired notification if it already exists and check it out. Refer to the Workflow MRG for more information if needed.

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



- 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**.



- These are the values that should be used depending on the OnBase environment. **See section on [Environment Usage](#) for more information before completing configuration with hard-coded values.**

Make sure your entries do not include any leading or trailing spaces! Studio will not trim them out and your URL will not work if it includes any spaces

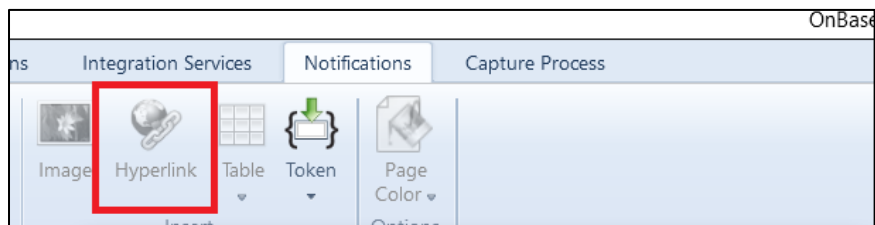
	SERVER	VIRTUAL ROOT
DEV	dm-dev.dev.cu.edu	AppNet
TST	dm-tst.qa.cu.edu	AppNet
STG	dm-stg.qa.cu.edu	AppNet
PRD	dm.prod.cu.edu	AppNet

Instead of hardcoding these values, this is where we suggest using the property value for the server name/address.

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

- If you would like to display the FormPop URL as a hyperlink, with “friendly” display text, check the **Insert Hyperlink** box.

Once the FormPop URL is inserted in the template as a hyperlink, select it and then use the **Hyperlink** button on the menu to modify the display text. Enter the desired display text in the **Content** field.



- This is an example of what the notification URL looks like in a template for DMOTST.
 - DocPop

`https://%VpropServerAddress/AppNet/docpop/docpop.aspx?docid=%#&chksum=%S`

- WorkflowPop

<https://%VpropServerAddress/AppNet/Workflow/WFLogin.aspx?LifeCycleID=%L&QueueID=%Q&DocID=%#>

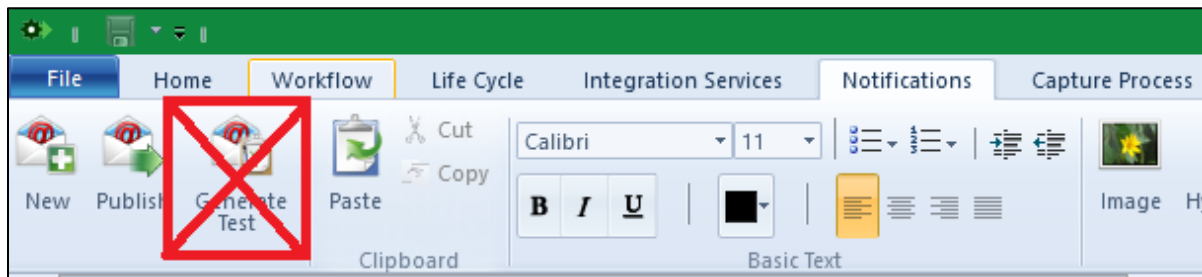
- i. If you'd like to use a WorkflowPop link to direct the user to the queue and not to a specific document in the queue, you can delete the last portion of this URL (“&DocID=%#”).
- ii. If you'd like the user to only see the specific document triggering the notification (and not be able to then navigate to other documents in the queue), you can add “hideLCQ=true” to the URL.

Testing

You will want to test these notifications to make sure the URL is functional, the content 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.

