



University of Colorado

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# OnBase Guide - Workflow - Real-Time Checklist

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**Goal:** To use the Real-Time Checklist Workflow Functionality in OnBase

**Complexity Level:** Departmental Workflow Developers

3/20/2019



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## Background

OnBase and PeopleSoft Campus Solutions have been integrated to provide real-time checklist creation and updates. This guide will provide the requirements for utilizing the real-time checklist functionality in OnBase workflow.

In OnBase workflow, a document can live in multiple life cycles at the same time. The checklist update process takes advantage of that ability to have the document stay in the original life cycle while simultaneously also being processed in the checklist update life cycle.

The basic process for invoking the real-time checklist update process boils down to three discrete steps.

1. Add the document from the original life cycle to the Base Checklist Update Life cycle, but not remove the document from the original life cycle. The document stays in the same queue in the original life cycle until the checklist process is complete.
2. Run a timer in the original life cycle to determine when the Base Checklist Update Life cycle process has completed.
3. Check for any errors and handle as necessary.

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## Prerequisites

To create and configure the components for this integration you will need to use the following OnBase tools:

1. OnBase Configuration
2. OnBase Studio
3. OnBase Unity Management Console

Please reference other [UIS guides](#) for installation instructions and configuring each of the products. The Workflow and Unity Scheduler MRGs also provide further details. Contact [UIS\\_DM\\_Support@cu.edu](mailto:UIS_DM_Support@cu.edu) for assistance if needed.

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## Steps to Complete in OnBase Configuration

To use the OnBase Checklist Update functionality, there are some configuration steps you need to complete in OnBase Configuration. Refer to the System Administration MRG for additional information if necessary.

1. Create a Document Type for the original document (if it does not already exist).
2. Apply the *X - ICS - Basic Student Info* keyword type group to the document type (if it is not already). This will apply the basic student keywords for student documents.

3. Apply the *X - CL - Checklist Keywords (EIS)* keyword type group to the document type. This will apply the keywords necessary for the integration to work.

NOTE: If you have already applied any of the keywords from the 'X - CL - Checklist Keywords (EIS)' keyword group to the document type, you can add

the rest individually as needed. The following keyword types all need to be present for the integration to work.

- Checklist Admin Function
- Checklist Code
- Checklist Item
- Checklist Item Status
- Checklist External Organization ID
- Document Handle
- EIS Integration Status

4. Add any additional keyword types that are necessary (depending on the Checklist Admin Function) to the document type.

Keywords for ADMA:	Keywords for FINA:	Keywords for FINT:
Academic Career	Aid Year	Aid Year
Student Career Number		Term Code
Application ID		

5. If desired, reorder the keyword types using the **Move Up** and **Move Down** buttons.
6. You can also preset default checklist keyword values for documents added to the document type and/or make some of the keywords hidden to end users if you wish.

Alternatively, you can skip to the next step and set the checklist keyword values in your own workflow prior to submitting the document to the Base Checklist Life cycle.

- a. To set the default checklist keyword values for the document type, select the **Options** button below the list of selected keyword types.

- b. Click in the **Default Keyword Value** column to the right of the keyword type you wish to set a default value for and type the default value.

Keyword Type	UNQ	REQN	REQR	EXDB	EXIDC	HID	RO	Default Keyword Value
Academic Career	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Aid Year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Application ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Campus Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CUBLD
Checklist Admin Function	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINA
Checklist Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GLABEL
Checklist External Organization ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Checklist Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GLABEL
Checklist Item Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Document Handle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
EIS Integration Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

UNQ - Keyword is used to determine uniqueness of new documents  
 REQN - Keyword field is required for new documents  
 REQR - Keyword field is required for Retrieve Dialog Queries  
 EXDB - Exclude from double blind indexing  
 EXIDC - Exclude from Interactive Data Capture  
 HID - Hidden unless the user has Access Restricted Keywords privilege  
 RO - Read only unless the user has Access Restricted Keywords privilege

- c. If you are concerned about these keywords being visible to your users, you can choose to hide the checklist keywords as well. Just check the “HID” box next to each keyword type as desired.

Keyword Type	UNQ	REQN	REQR	EXDB	EXIDC	HID	RO	Default Keyword Value
Academic Career	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Aid Year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Application ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Campus Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CUBLD
Checklist Admin Function	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FINA
Checklist Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	GLABEL
Checklist External Organization ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Checklist Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	GLABEL
Checklist Item Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Document Handle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
EIS Integration Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- d. Click **Close** when done.

7. Once all of your keyword type changes are complete, click **Save**.

Keyword Type Selection

Available

Keyword Type

- # of Credits Remaining
- # of Installments
- A - SOM - Department
- A - SOM - Division
- A - SOM - Rank
- A - SOM - Status
- ABA
- Academic Unit
- Academic Year
- Account #
- Account Code
- Accounting Period
- ACCTG - Cash Receipt Type
- Action Type
- ADM Application on File?
- ADSASS ID
- Advisor

Keyword Type Group

- D - BUR - 3rd Party KW Group
- S - ES - Basic Employee Info
- S - ES - Ticket Update Data
- X - CL - Checklist Variables (EIS Form)
- X - FIN - Capital Construction
- X - FIN - FOPPS
- X - FIN - Journal Entries
- X - HCM - Basic Employee Info

AutoFill Keyword Set

X - ICS - Basic Student Info AFKS

Selected

Keyword Type / Keyword Type Group

- X - ICS - Basic Student Info
- Academic Career
- Student Career Number
- Application ID
- Aid Year
- Term Code
- X - CL - Checklist Keywords (EIS)

All Keywords

- Student ID
- First Name
- Middle Name
- Last Name
- Date of Birth
- Campus Code
- Academic Career
- Student Career Number
- Application ID
- Aid Year
- Term Code
- Checklist Admin Function
- Checklist Code
- Checklist Item
- Checklist Item Status
- Checklist External Organization ID
- Document Handle

Options Cascading Data Sets

Migrate To Keyword Type Group

Save

New Keyword Type

Clear

Cancel

This completes all configuration steps necessary in OnBase Configuration.

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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 necessary configuration to prepare documents for processing and add them to the primary checklist life cycle is described below. However, instead of configuring this yourself, you may instead opt to copy the configuration from the [Example Checklist life cycle](#). Either way, this processing should be added to a queue in the life cycle for your business process, referred to throughout the guide as the “Original life cycle”.

### 0. Prepare the document for processing.

If you did not set default values for all checklist-related keyword types based on the document type, set these values using workflow rules and actions.

Since the Base Checklist Update Life cycle does check for the existence of the required keyword values, you will not have to build that into your original life cycle unless you really want to. However, doing so may reduce delays in checklist processing due to missing keyword values.

1. **Add the document from the original life cycle to the Base Checklist Update Life cycle (*X – CL – Checklist Update Integration (EIS)*), but do not remove the document from the original life cycle.**

The screenshot shows the configuration window for the 'Add Item to Other Life Cycle' action. The 'Action Type' is set to 'Add Item to Other Life Cycle'. The 'General' tab is selected, and the 'Documentation' sub-tab is active. The 'Target' is set to 'Current Item'. The 'Life Cycle' is set to 'X - CL - Checklist Update Integration (EIS)'. There is an unchecked checkbox for 'Get Life Cycle from this Property'. The 'Queue' is set to 'CL - Initial'. There is an unchecked checkbox for 'Get Queue from this Property (leave blank to use Initial Queue)'. There is also an unchecked checkbox for 'Use Initial Queue if Property does not exist'.

The document stays in the original life cycle queue until the checklist process is complete (as determined by a timer on the queue). This “Add Item to Other life cycle” allows the document to stay in the original life cycle while also being processed in the *X – CL – Checklist Update Integration (EIS)* life cycle.





This is what triggers the checklist update with PeopleSoft. Once a document has completed its processing in the *X – CL – Checklist Update Integration (EIS)* life cycle, the 'EIS Integration Status' keyword will contain the results of the integration. Here are some examples of the values you can expect to see in the 'EIS Integration Status' keyword:

- SUCSS: Checklist Added
- SUCSS: Checklist Updated
- ERROR: Checklist Admin Function KW Value Missing
- ERROR: Checklist Code KW Value Missing
- ERROR: Checklist Item KW Value Missing
- ERROR: Checklist Item Status KW Value Missing
- ERROR: Academic Career KW Value Missing
- ERROR: Aid Year KW Value Missing
- ERROR: Application ID KW Value Missing
- ERROR: Student Career Number KW Value Missing
- ERROR: Term Code KW Value Missing
- ERROR: Emplid is not Aid Year Activated
- ERROR: (91.37) - Error saving Component Interface.  
{CU\_HY\_CHKLIST\_MNGMNT\_CI} (91.37)
- ERROR: (91.34) - Error changing value.  
{CU\_HY\_CHKLIST\_MNGMNT\_CI.PERSON\_CHK\_ITEM(1).ITEM\_STATUS} (91.34)

The last two status reflect issues on the Campus Solution side where the Checklist Item and or Admin functions were just not correct at all.

## **2. Run a timer in the original life cycle to determine when the Base Checklist Update Life cycle process has completed.**

We cannot guarantee how long the real-time checklist update process will take (usually around 1 second), so we need to have a timer look at the 'EIS Integration Status' keyword value to know when it is okay to continue forward.

NOTE: Each Life cycle you configure for checklist updates will need to have its own timer. Timers in OnBase cannot be shared outside of a life cycle. If you have one checklist life cycle where you do all of your checklist processing, then you may only need one timer, but if you have multiple life cycles where you do checklist processing you'll need a timer for each life cycle.

The 'EIS Integration Status' keyword will have two primary values after being processed in the Base Checklist Update life cycle:

1. SUCSS\*
2. ERROR\*

In the example life cycle, we provide a method that looks for a SUCSS\* status in the 'EIS Integration Status' keyword and if true, send the document on its way to the next step or queue in your original life cycle.

Properties

CL01 - EIS Integration Status = Success? ID: 3871

Created 6/30/2017 12:40:42 PM (Alan Vidmar - CUSYS UIS DM Project Manager)

Modified 6/30/2017 12:40:42 PM (Alan Vidmar - CUSYS UIS DM Project Manager)

Rule Type

Check Keyword Value

General Documentation

Target

Current Item

Keyword Type

EIS Integration Status

Currency Format

Operator

=

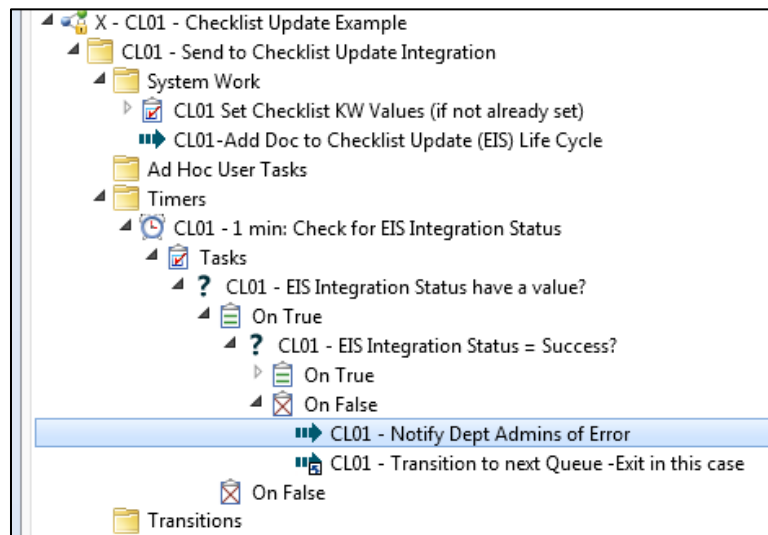
Compare To

☒ Allow Wildcards

SUCSS\*

### 3. Check for any errors and handle as necessary.

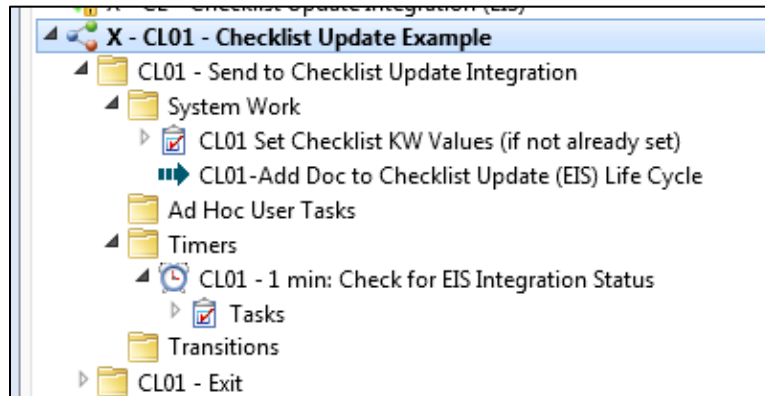
On the error handling side, once the Timer sees an ERROR\* value in the EIS Integration Status' keyword, the example workflow sends a workflow notification, but you can configure this to your own needs, such as having another Queue where you route the original document for manual re-indexing and then re-submission to the Base Checklist Update Life cycle.



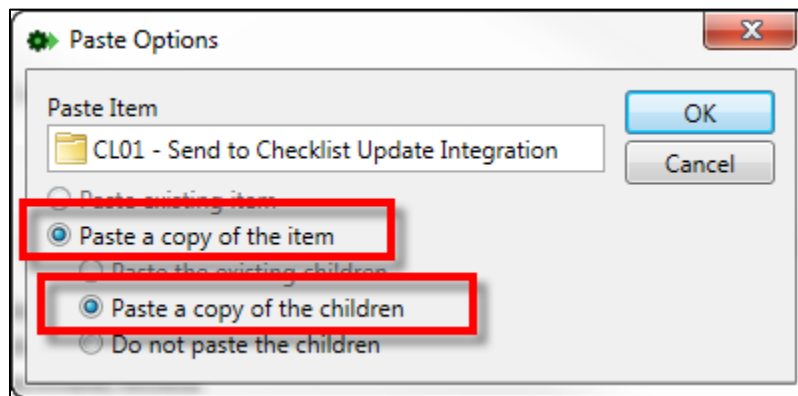
## Example Checklist Life Cycle

In Studio, we have provided an example life cycle that can be used as a reference and copied into your own life cycles where needed.

This example life cycle is called *X - CL01 - Checklist Update Example*. This life cycle has two queues, but only the first one is necessary, as the second queue would be the next step in your original life cycle for your business process.



If you want to copy the example *X - CL01 – Checklist Update Example* queue, please make sure that you use the 'Paste a copy of the item' and 'Paste a copy of the children' options so that you do not disturb the example life cycle.



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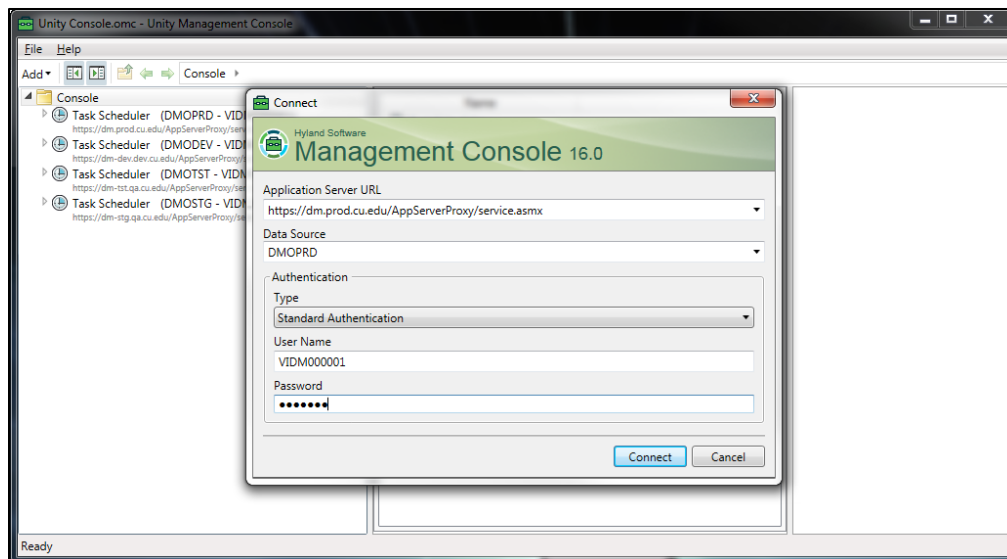
## Steps to Complete in OnBase Unity Management Console

Once you have created your timer in your life cycle, you will need to also create a new timer task in the OnBase Unity Management Console and tie them together.

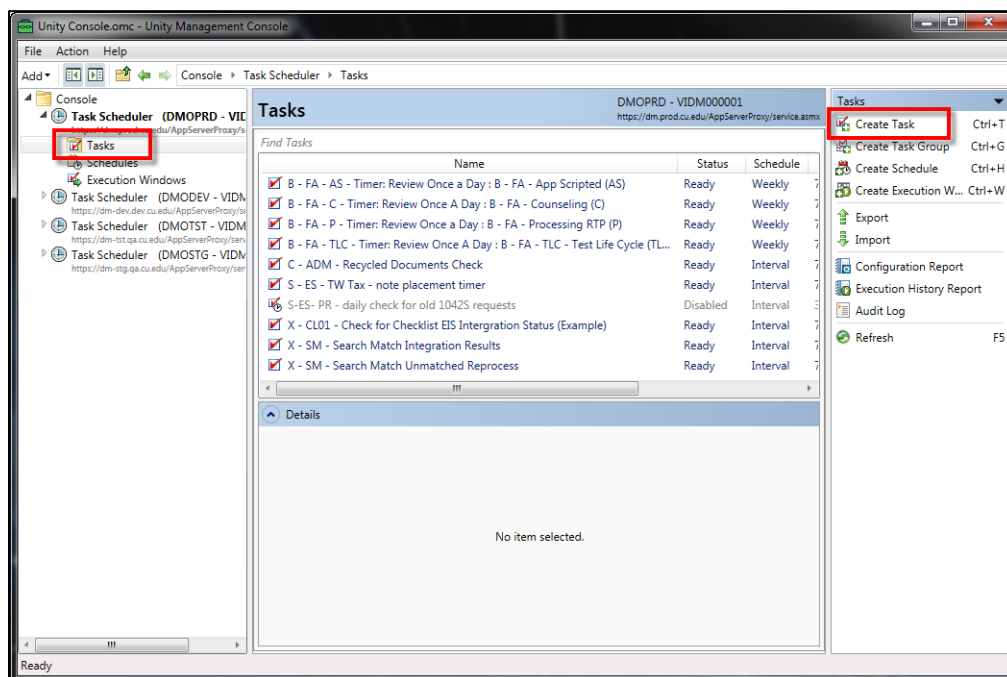
NOTE: Each Life cycle you configure for checklist updates will need to have its own timer. Timers in OnBase cannot be shared outside of a life cycle. If you have one checklist life cycle where you do all of your checklist processing, then you may only need one timer, but if you have multiple life cycles where you do checklist processing you'll need a timer for each life cycle.



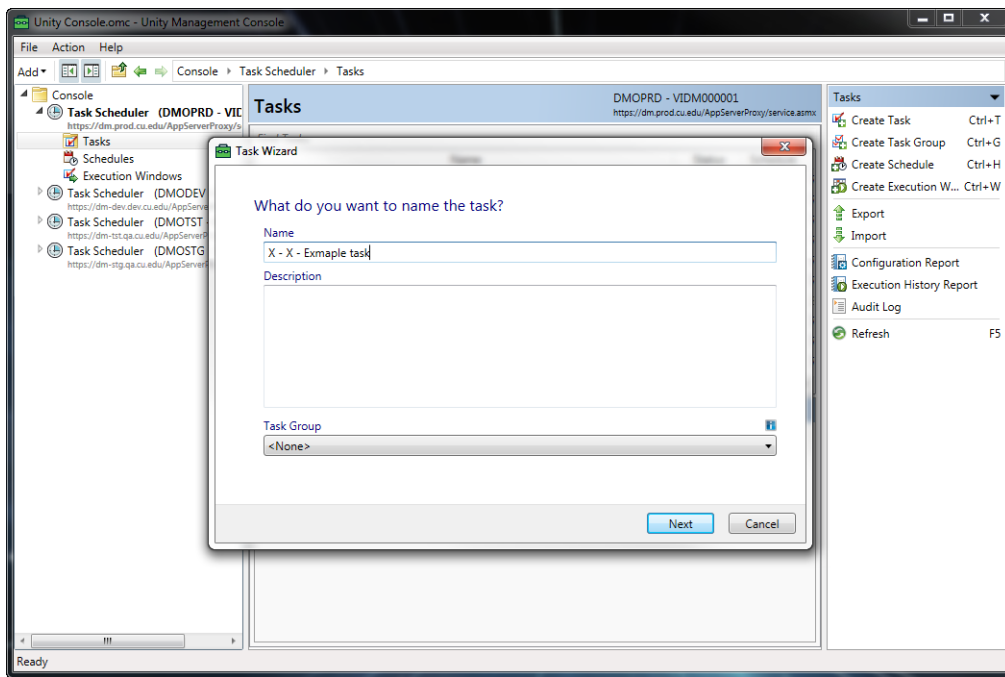
1. Launch the OnBase Unity Management Console and open your saved console file.
2. Select the environment you will be working in and log in.



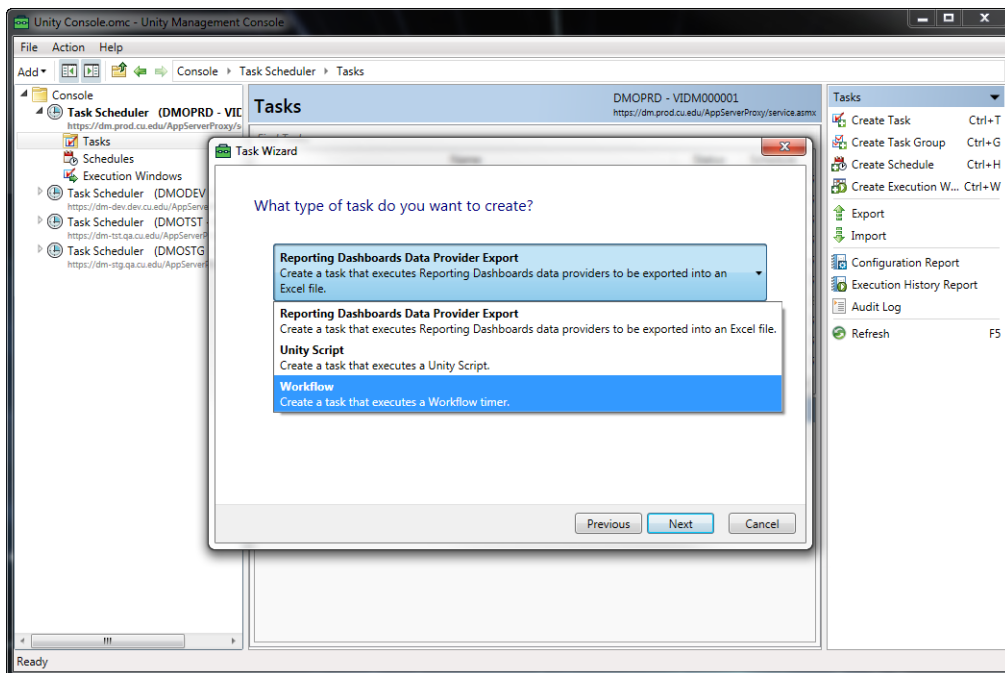
3. Select the **Tasks** tree option on the left and then select the **Create Task** option on the right.



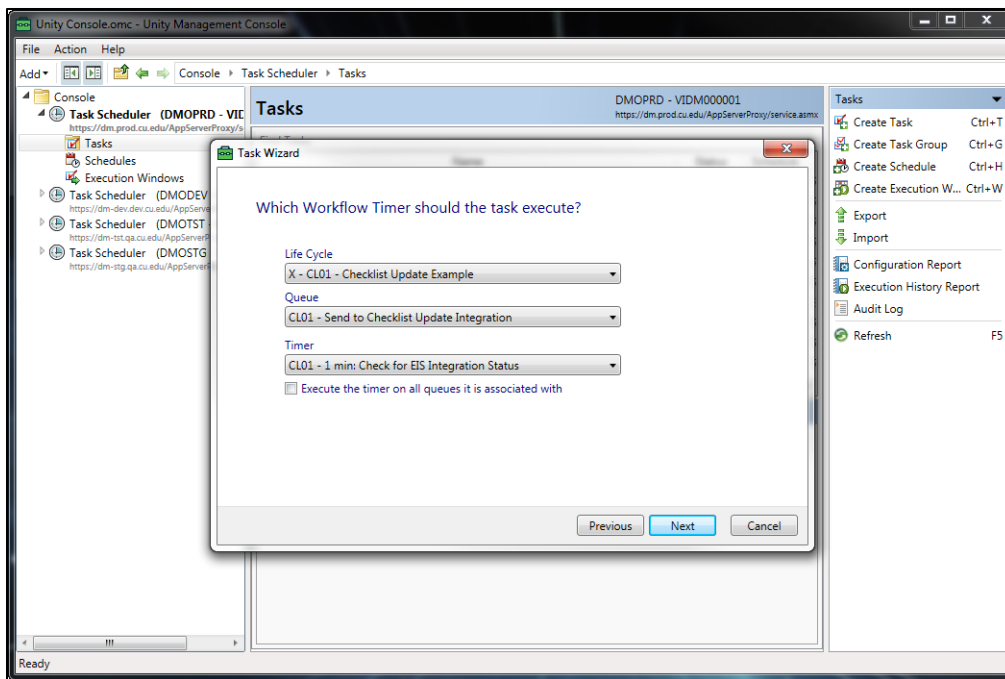
4. **Name** the new task according to the OnBase naming conventions. Do not select anything on the **Task Group** drop down.



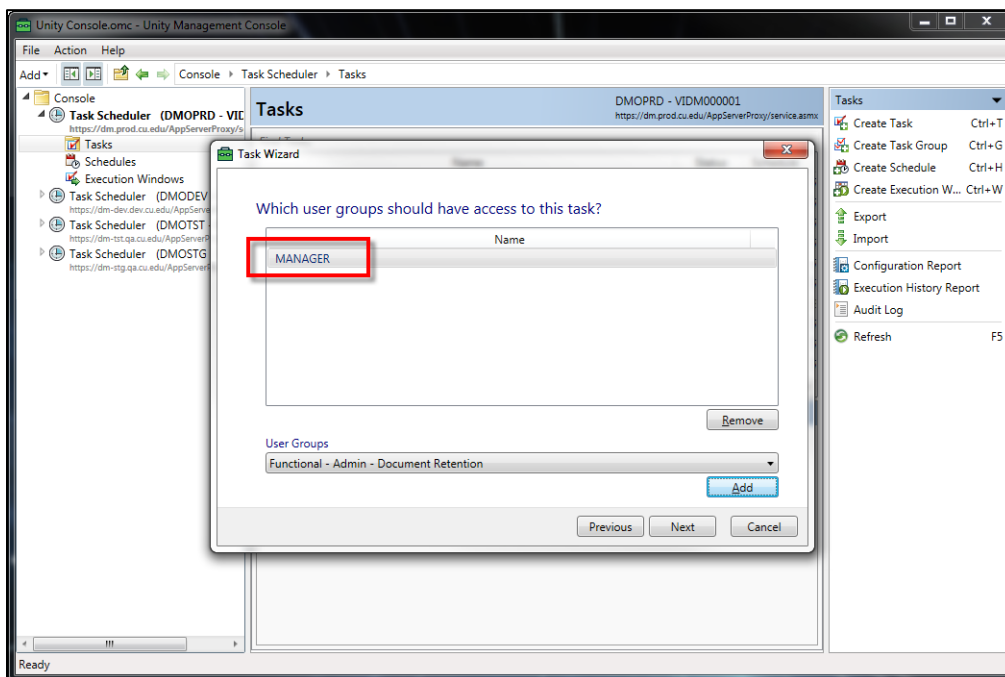
5. Select **Workflow** as the type of task to create.



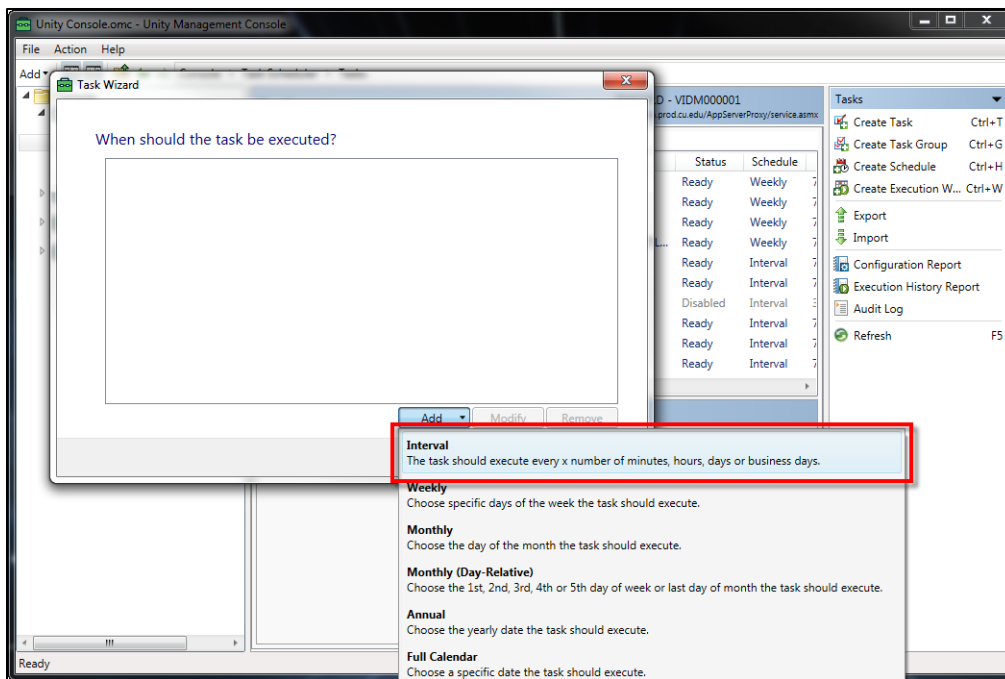
6. Select the **Life Cycle**, **Queue** and **Timer** that you have created to handle the Checklist Update steps in your original workflow.



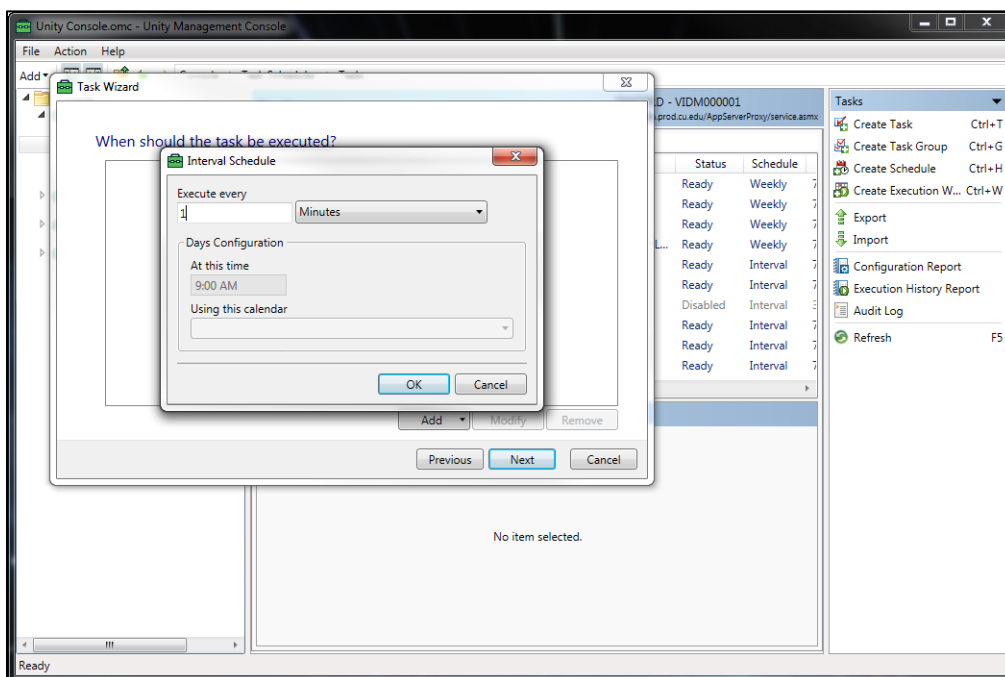
7. Add the **MANAGER** group (required!!!) and any other groups that you would like to be able to access the task.



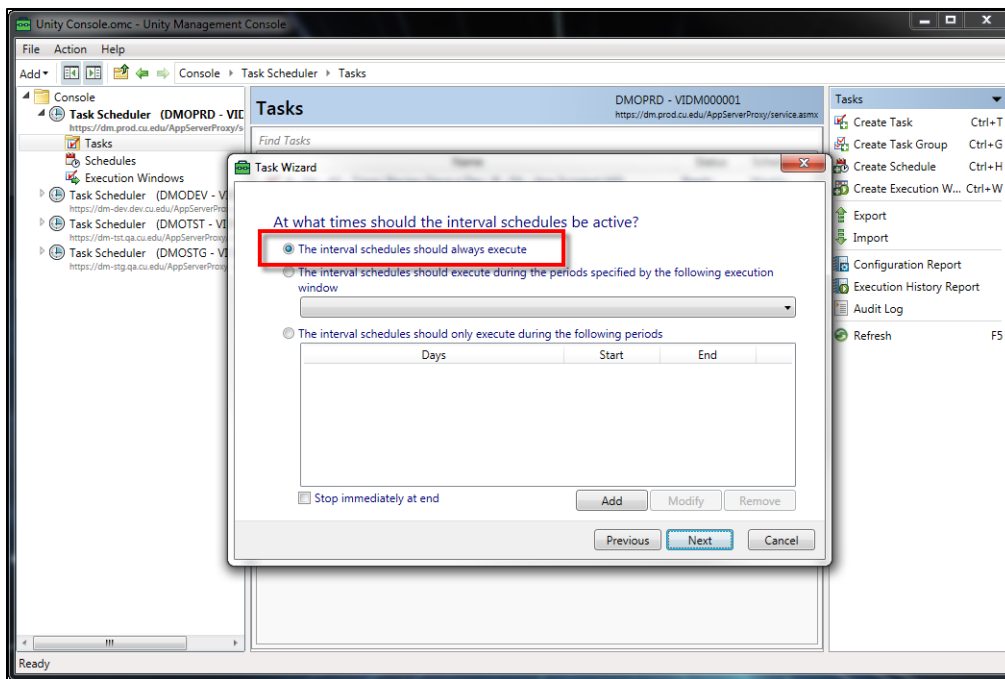
8. Click **Add** and choose an **Interval** type of schedule.



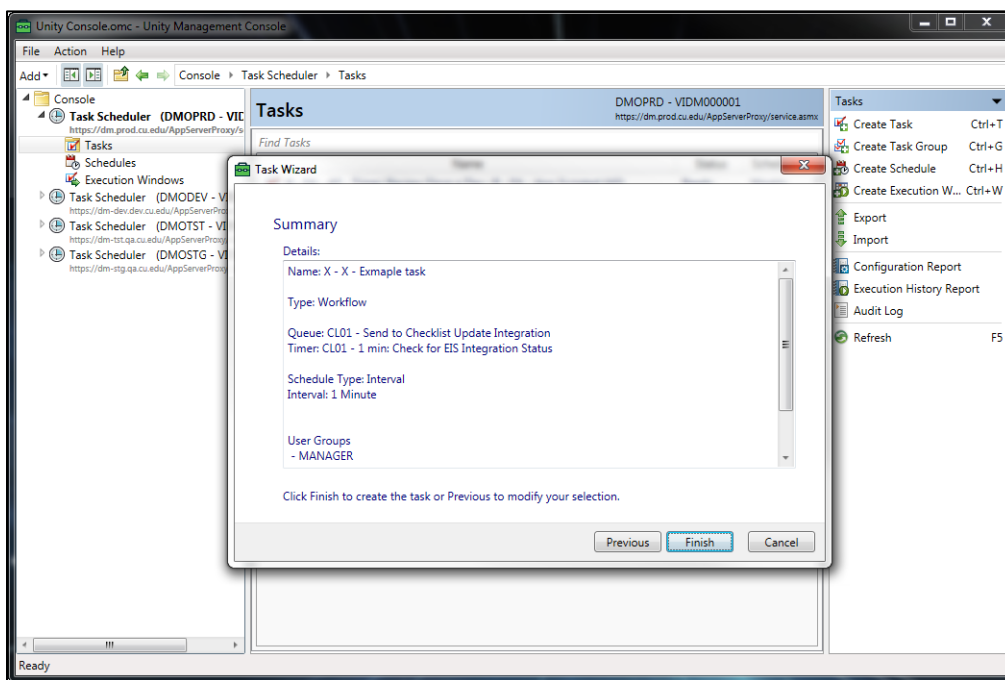
9. Set the interval to execute every 1 minute.



10. Set the schedule to always execute.



11. Click on the **Finish** button at the Summary screen.

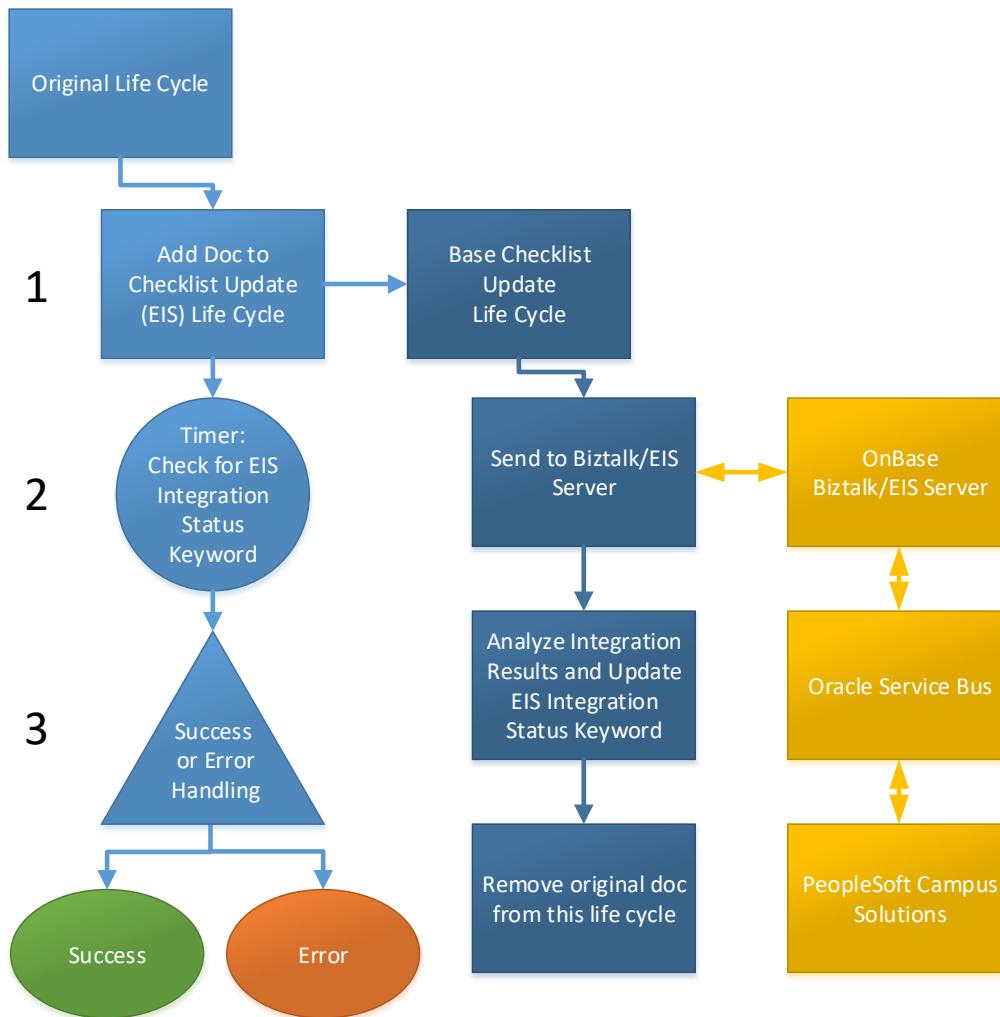


12. The new task will now show up in the Tasks list.

**IMPORTANT NOTE:** Any new Tasks will not be recognized or processed until the next day after the Unity Scheduler Service has reset overnight.

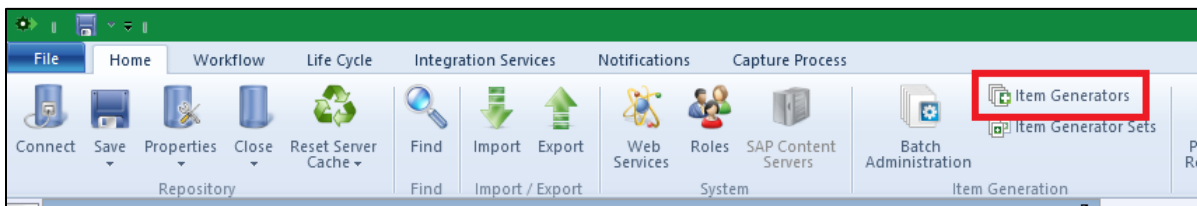


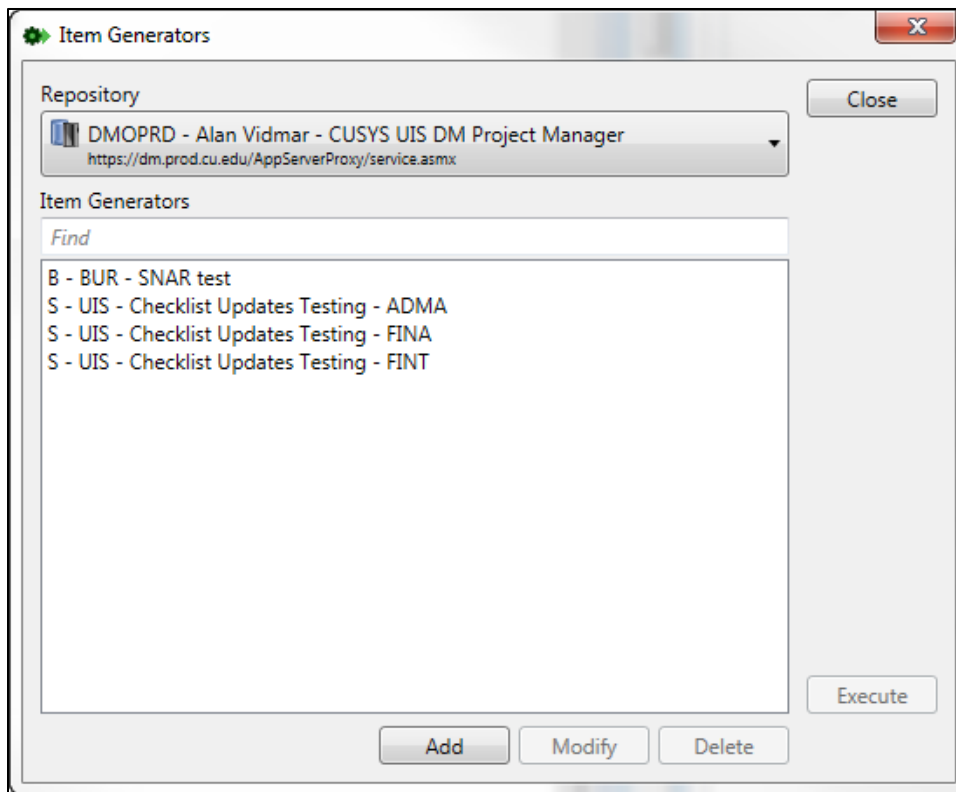
## OnBase Checklist Update Flowchart



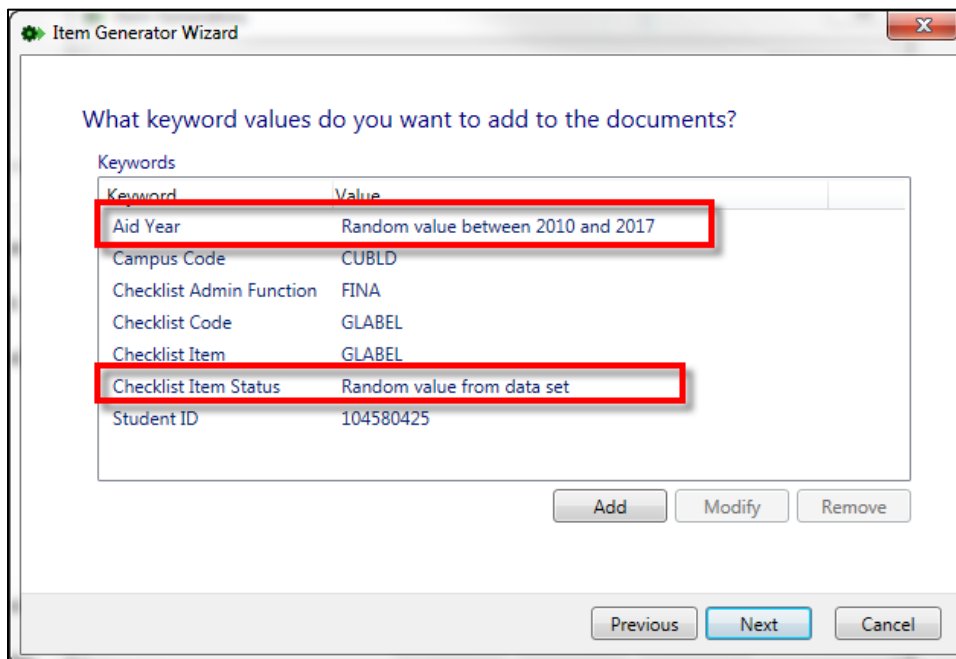
## Testing the Solution

To test the checklist integration, we have created multiple **Item Generators** in OnBase Studio. These let you test life 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.





Please note that we have set these up to generate multiple documents at the same time and to generate random values for some of the Checklist keywords.



Feel free to modify these or create your own Item Generators to suit your needs with your own document types, life cycles, queues and values.



Please do not run these in DMOPRD unless you use test IDs as this will update Checklists in Campus Solutions Prod.

You can monitor the testing status by looking at your original life cycle and specifically the 'EIS Integration Status' keyword value on each document while in Unity client workflow.