



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus



OnBase Guide - Creating OnBase Related Content links in PeopleSoft

Goal: To create an integration between PeopleSoft and OnBase to allow users to retrieve OnBase content from PeopleSoft

Complexity Level: Departmental Administrative Users

2/3/2023

Table of Contents

Background	3
Define the Search Method in OnBase	3
Creating the Related Content Service in PeopleSoft	4
Manage Related Content.....	5



Background

PeopleSoft and OnBase can be integrated using a PeopleSoft function called Related Content and Related Actions. PeopleSoft Related Content/Actions allows you to create a service that will use a URL to a third party application that can be evoked from within PeopleSoft while passing PeopleSoft data elements in the URI string to the third party.

The data element passed is usually the primary key on most PeopleSoft pages. IE: Student ID, Employee ID, External Org, etc. The result of executing a Related Content/Action link is the third party web application executing a function (document search in the case of OnBase) and displaying the results inside or alongside of PeopleSoft.

When this method is used to search for documents in OnBase, SSO is used to identify the user account in OnBase and only return content that the user has access to otherwise. So users will still only see the document types and documents they have access to in the Unity and web clients.

Prerequisites

This process will require use of OnBase Configuration. Refer to the [OnBase Client Guides](#) for instructions on installation.

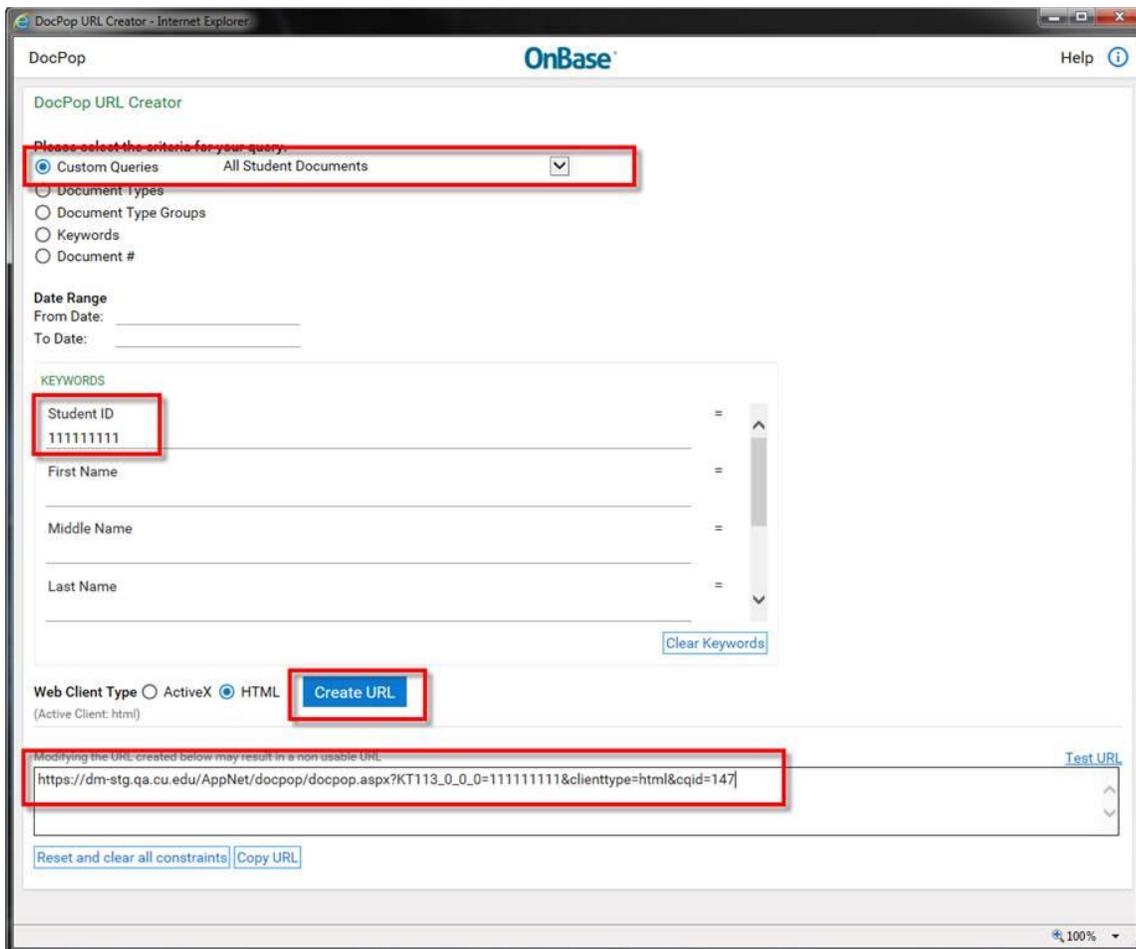
Also refer to the System Administration MRG for more information if needed and contact UIS_DM_Support@cu.edu for help.

Define the Search Method in OnBase

Before you begin setting up the Related Content link in PeopleSoft, you have to decide what and how you want to conduct your search into OnBase (ex. DocPop, UnityPop, FolderPop, etc). We tend to use DocPop more than other methods.

Then you have to decide, which type of DocPop search are you going to use. We use the DocPop URL creator (see [SharePoint](#) for links for each environment) to help with this step, it can be done based on a custom query, document type, document type group, or keyword type.

Here we are using a **Custom Query** as the target and then put in a dummy SID into the DocPop URL creator to help define the format of the URL. Use OnBase Configuration to create your Custom Query if needed and it does not already exist.



This is the base URL that can be put into PeopleSoft. However, this uses the default web server AppNet, which needs to be replaced with “PS” for SSO from PeopleSoft.

After that, the URL should look like: `https://dm-stg.qa.cu.edu/PS/docpop/docpop.aspx?KT206_0_0_0=111111111&clienttype=html&cqid=147`

Creating the Related Content Service in PeopleSoft

When creating the Related Content Service, you need to think about this more as a general access method between PeopleSoft and OnBase. For example, you could call the Service “Checklist” but you really need to think more broadly than that, as this Related Content service can be applied to any PeopleSoft page, not just the Checklist page.

We call our Related Content Service for retrieving student documents “Search DMO All Student Docs” because we’re going to focus on the Student ID keyword as the link between the two systems.

As you'll notice in the screen shot below, we have to put our Student ID Keyword (KT113_0_0_0) into the "Service URL Parameters" field so that we can then later on map that field to individual pages in PeopleSoft.

Define Related Content Service

Service Information

Service ID: CUCS_ONBASE_ALL_STUDENTS

*Service Name: Search DM All Stud

Object Owner ID: []

Description: This Related Content link searches into the All Student Documents Custom Query of OnBase

*URL Type: Non-PeopleSoft URL

URL Information

Node Name: []

*External URL: https://dm-dev.dev.cu.edu/PS/docpop/DocPop.aspx?cqjd=147&clienttype=html

Post mapping definition data Escape URL Parameters

Note: parameter names are case-sensitive.

Service URL Parameters

*Parameter Name	Required Flag	*Description
1 KT113_0_0_0	<input checked="" type="checkbox"/>	CS EMPLID

Display Options

Refresh New Window

Select Security Options

Public Access Related Content Provider Security Related Content Consumer Security

App Class Required

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display

Manage Related Content

Once you've created the Related Content Service you'll then need to apply that service to the pages where you want it to appear. This is done with the "Manage Related Content" set of menus in PeopleSoft.

[Favorites](#) > [Main Menu](#) > [PeopleTools](#) > [Portal](#) > [Related Content Service](#) > [Manage Related Content Service](#)


User: VIDM000001 on Database: ICSDEV
Menu Search

[Content References](#) | [Pivot Grids](#)

Manage Related Content for Content References

Related Content services are assigned to the following application pages:

Search

Content References		Find View All 	First  1-20 of 76  Last
	Content Reference	Edit	Remove
1	Campus Community > Student Services 2 - Hidden > Academics Summary	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
2	Student Admissions > Application Entry > Add Application	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
3	Campus Community > Personal Information (Student) > Add/Update a Person	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
4	Campus Community > Personal Information > Add/Update a Person	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
5	Student Admissions > Application Maintenance > Additional CU Application Data	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
6	Campus Community > Student Services 2 - Hidden > Admissions Summary	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
7	Self Service > Advisor Center > Advisee Student Center	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
8	Financial Aid > Awards > Award Processing > Assign Awards to a Student	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
9	Student Admissions > Application Evaluation > CU AutoEvaluation Results > CU Application Evaluation	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
10	Student Admissions > Application Entry > Personal Information > CU Application Residency	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

At the bottom of that page you'll see an option for "Assign Related Content to an Application Page". You're then presented with a list of all pages in PeopleSoft that can support Related Content services. This is where you can find the "Checklists" pages (for example).



Select a Content Reference

Click a content reference link to pick a content reference

Click "Cancel" to go back to Manage Related Content Service page.

Include hidden Crefs

Left | Right

- Root
 - + CU Conversions
 - + CU Portal
 - + CU Portal Administration
 - + Self Service
 - + Manager Self Service
 - + Recruiting
 - + Workforce Administration
 - + Benefits
 - + Compensation
 - + Stock
 - + Time and Labor
 - + Payroll for North America
 - + Global Payroll & Absence Mgmt
 - + Payroll Interface
 - + Workforce Development
 - + Organizational Development
 - + Enterprise Learning
 - + Workforce Monitoring
 - + Pension
 - Campus Community
 - + CU Campus Community Customs
 - + Personal Information
 - + Personal Information (Student)
 - + SEVIS
 - Checklists
 - Person Checklists
 - [Checklist Management - Person]
 - [Item Update - by Person]
 - [Item Update - by Item]
 - [Person Checklist Summary]
 - [Person Checklist Detail]
 - [Person Tracking Summary]
 - [Person Tracking Inquiry]
 - + Organization Checklists
 - + Event Checklists
 - + Mass Change - Checklists



Once you've selected a page, then you'll have to add the Related Content Service you created and then configure the service to map the Student ID from that page to the Variable Parameter (OnBase keyword)

[Favorites](#) > [Main Menu](#) > [PeopleTools](#) > [Portal](#) > [Related Content Service](#) > [Manage Related Content Service](#)


User: VIDM000001 on Database: ICSDEV

[Menu](#) Search [Advanced Search](#)

[Configure Related Content](#) | [Configure Related Actions](#) | [Configure Layout](#)

Assign Related Content

Assign content to be displayed within the Related Content Frame. Use the Configure link to define the parameter mappings and security settings for the service.

Portal Name EMPLOYEE
Content Reference [Checklist Management - Person](#)

Component Level Related Content

Assign Component Level Related Content to be added to the Related Content menu.

[Personalize](#) | [Find](#) | [View All](#) | [First](#) 1 of 3 [Last](#)

Enable	Service Type	Select	Service ID	Service Label	Configure
<input checked="" type="checkbox"/>	Service		CUCS_ONBASE_ALL_STUDENTS	Search DMO All Student Docs	Configure + -
<input checked="" type="checkbox"/>	Service		CUCS_SINGULARITY_ADM_DOCS	Search DMS Admissions Stud	Configure + -
<input checked="" type="checkbox"/>	Service		CUCS_SINGULARITY_ALL_STUDENTS	Search DMS All Student Docs	Configure + -

Page Level Related Content

Assign Page Level Related Content to be added to a field level contextual menu.

[Personalize](#) | [Find](#) | [View All](#) | [First](#) 1 of 1 [Last](#)

Enable	*Page	Service Type	Select	Service ID	Service Label	Page Field Menu	Configure
<input checked="" type="checkbox"/>	<input type="text"/>	Service	<input type="text"/>				Configure + -

[Return to Manage Related Content Configuration page](#)

[Save](#) [Notify](#)

[Configure Related Content](#) | [Configure Related Actions](#) | [Configure Layout](#)

Favorites ▾ Main Menu ▾ > PeopleTools ▾ > Portal ▾ > Related Content Service ▾ > Manage Related Content Service


 User: VIDM000001 on Database: ICSDEV
 Menu ▾ Search

Configure Service

Service ID CUCS_ONBASE_ALL_STUDENTS
 Service Label Search DMO All Student Docs

Map Parameters ?
Personalize | Find | View All |  First 1 of 1 Last

Parameter Name	Parameter Label	Required Flag	Mapping Type	Select	Mapping Data	Mapping Details	Refresh Service On Change	Is Value Required?
1 KT113_0_0_0	CS EMPLID	<input checked="" type="checkbox"/>	Key Field ▾		ID		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Service Filter ?
 Package 
 Path 
 Class ID 

Select Security Options
 Public Access

And that's basically it. Again, if you create a Related Content service that can be used over and over again, then you create it once and just keep applying it where ever you want!