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

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**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](mailto: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 (http://<dmsVirtualRoot>/docpop/docpopURLCreator.aspx) 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.

### 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.
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).
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)
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 wherever you want!