OnBase Guide - Document Composition

Goal: To use the Document Composition module in OnBase to create documents based on a template

Complexity Level: Certified Departmental Admins, Document Composition Admins, Departmental Workflow Developers

7/28/2023

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Background

The Document Composition module facilitates generation of documents that are customized based on configurable templates. They can aggregate information from multiple sources, including user or database input, scripts, WorkView attributes, E-Form data, images, Keyword Values, or other values stored in OnBase (not including Workflow property values).

Templates are created directly in Microsoft Word. Once configured, templates can be used to create new documents based on information already stored in OnBase. Users can preview or edit these documents after creation. Documents can be stored in OnBase and e-mailed to recipients.

Workflow can be used to automate the document creation process (and/or the delivery of the composed document) or this can be done manually on an ad hoc basis. Either way, documents must be **composed from the Unity client.**
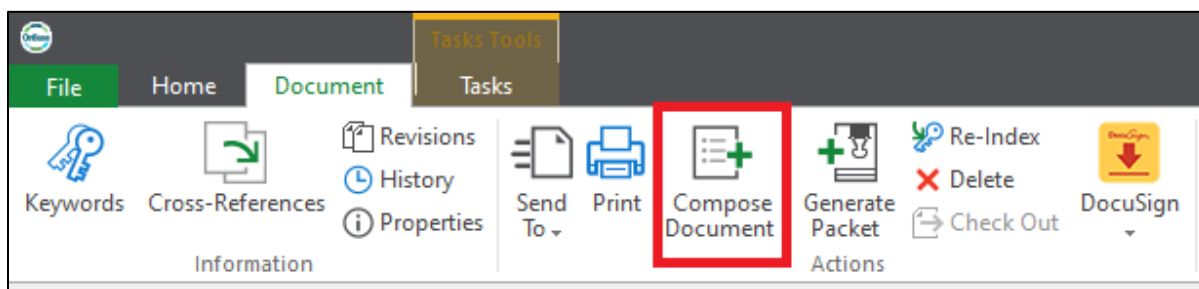
Prerequisites

To configure Document Composition, you will need to utilize the following tools:
1. Microsoft Word. The clickonce MS Office add-ins (including the Document Composition Template Builder) are for **32-bit Office** installs only.
2. OnBase Template Builder Add-in for Microsoft Word
   - Install with clickonce; open these links in **Edge.**
     - DMOPRD
     - DMOSTG
     - DMOTST
     - DMODEV
   - NOTE: Only one environment's template builder can be installed/active at any time.
3. OnBase Configuration (if document type configuration is necessary)
4. OnBase Studio (if using Workflow to generate or send composed documents)

Please reference other UIS guides for installation instructions for Configuration and/or Studio.

In order to configure templates, users will need to be members of either the **Functional - Admin - System (Certified Only)** or **Functional - Doc Comp Admin** user group. To limit configuration rights to certain users, create a "Doc Comp" user group with the appropriate members and assign the user group to your template groups (at the "Template Group Security" prompt).

Functional level 2-4 users can compose documents using templates they have been granted end-user access to.

NOTE: Templates are not limited to creation from certain document types. Users can compose documents using any template(s) they have access to from any source document.

Contact UIS_DM_Support@cu.edu for assistance if needed.

Training and Resources

The following trainings and resources are available to familiarize yourself with Document Composition:
- Document Composition MRG
- Document Composition Community page
- Document Composition Hands-On Lab

Steps to Complete in OnBase Configuration

Before configuring the Document Composition template, the document type where the composed documents will be stored should be configured in OnBase Configuration. Any keyword types that should inherit values from the source document should be configured on this destination document type.

The source document/content item will also need to have all values that will be used as the source of information for the generated document in order to fill those values. This can include keyword types on document types, fields on Unity forms, etc.

Refer to the System Administration MRG for additional information if necessary.

Configuring the Template

- All Document Composition configurations (template groups, templates, fragments, etc.) **must** follow the OnBase Naming Conventions. Composed documents must also have a value for the Campus Code keyword.
- Make sure you know which environment you are in! The template builder can be in use for a different environment than the primary Word plugin. To check the template builder environment, click the Export button on the Template Builder tab.

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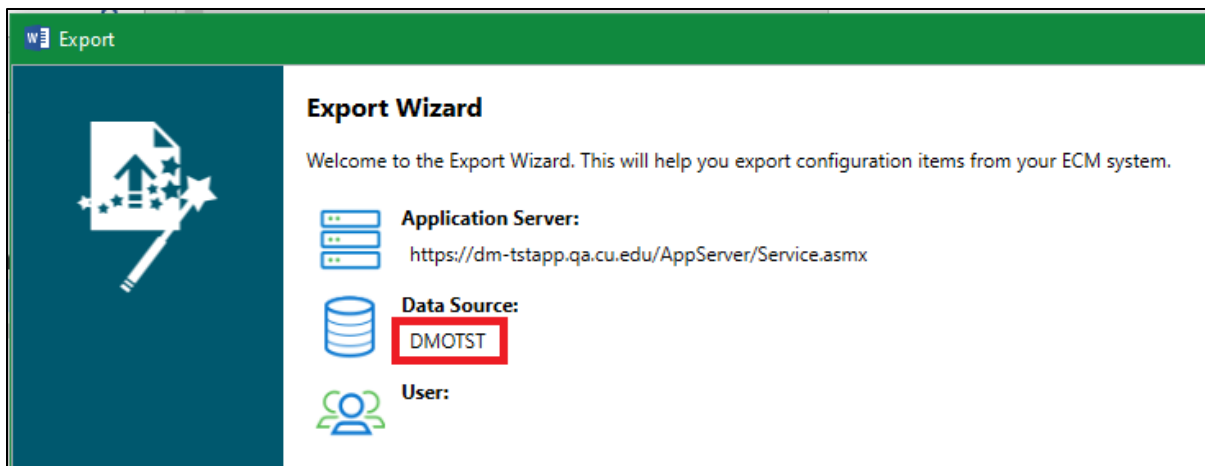
- Build and test templates in increments. Save often! Make sure to save the template using the **Save Template** button on the Template Builder tab.
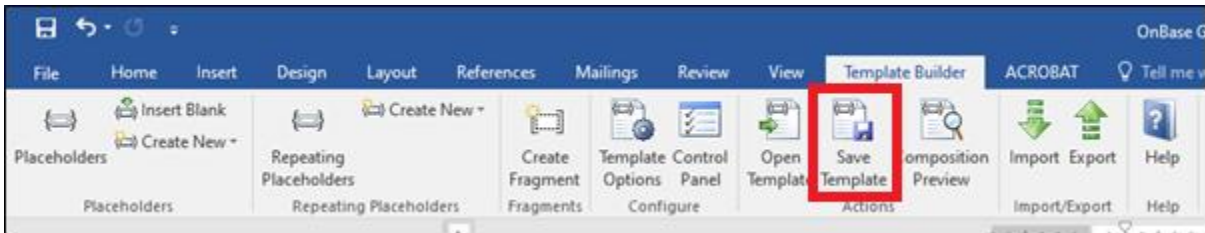
- When creating a new template, you can start from scratch or start with an existing Word document.
- When creating placeholders, do not copy and paste. Use the menu buttons to create and insert placeholders.
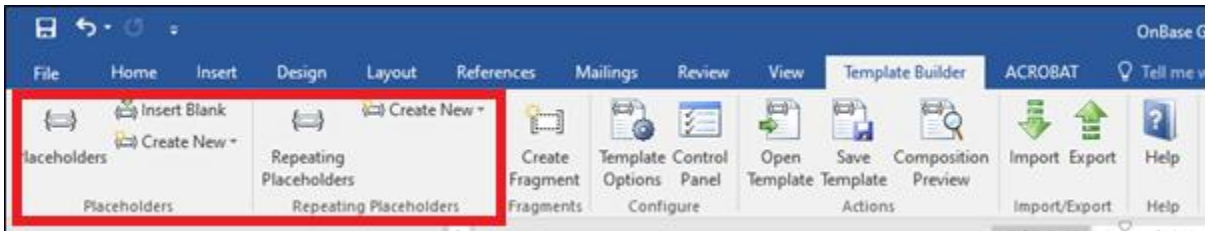
- Resize images that will be included in the template before adding them to the template.
- Changes to the template do not require a cache reset or client re-launch to take effect.
- If the composed document needs to be emailed, we recommend this is done using workflow (more information below).
  - Configuring email settings on the template only allows for static email addresses and message content, and users composing the document are not able to tell this is configured.
  - When composing documents ad hoc, users are given an option to email the document. If using workflow processing to send documents, advise users not to use this option in order to avoid duplication and ensure consistency.
- Considerations for user prompts:

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o If using user prompts for placeholders, documents cannot be composed by workflow except in ad hoc tasks so that the user will be prompted to enter those values. The Compose Document action will fail if used in system or timer work when the template requires user input.
o If a user enters a value for a prompt that is stored to a keyword value and the length of their entry exceeds the size of the keyword, the document will not be created.

Steps to Complete in OnBase Studio

If the composed document is entering workflow, ensure the initial queue(s) the document enters do not include system work. Include any necessary processing on a timer on the initial queue. Any problems encountered during system work will cause Document Composition to fail.

Refer to the Workflow MRG for more information on configuring Workflow if necessary.

Composing Documents Using Workflow

Use the Compose Document action to compose documents in Workflow. This can not be executed in the web client.

If using user prompts for placeholders, documents cannot be composed by workflow except in ad hoc tasks so that the user will be prompted to enter those values. The Compose Document action will fail if used in system or timer work when the template requires user input.

More information is available in the Workflow MRG (Compose Document) and the Document Composition MRG (System Interaction - Workflow)

Sending Composed Documents Using Workflow

Whether documents are composed ad hoc by users or by workflow processing, another life cycle can be used to send the composed document to the intended recipient(s).

Configuration considerations for sending composed documents using workflow:
- Consider how the recipient address will be determined. If you want to use a keyword value, you will either need to have this value on the source document so that the composed document can inherit the value, index the composed document with the value manually upon creation, or use a script to retrieve the email address based on Student ID.
- Do not configure email settings on the template. All the notification configuration should be done within workflow.
- The composed document will be sent as an attachment.

Steps to send composed document using Workflow:
1. Configure a life cycle with the destination document type for composed documents assigned to it.
   a. If other documents will be added to this document type (and they don't need to be sent), you'll need a method to distinguish them from the composed documents that need to be sent.
   b. Alternatively, it may be best to use a separate document type for the composed documents. They can be moved to a different document type after the notification is sent if desired.

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2. Don't put any processing in system work on the initial queue; initial queue processing should be done on a timer.
3. Configure a notification template with the desired recipient(s), subject line, and body text. The notification should be configured to include "This Document" as an attachment.
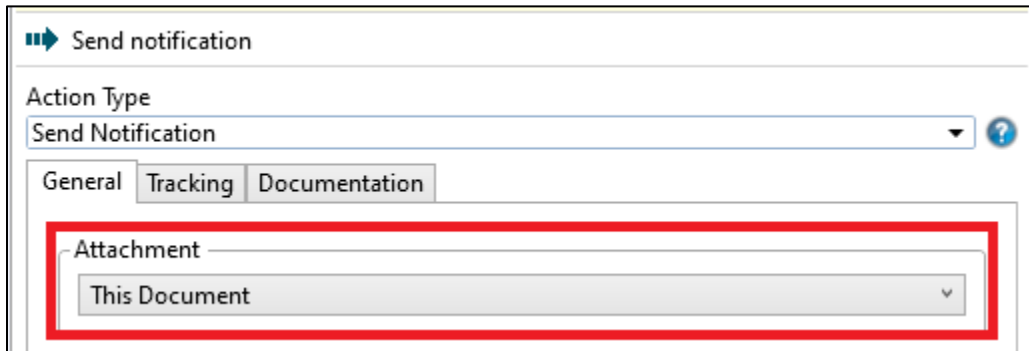
Testing Document Composition

The Template Builder has a built-in testing option, Composition Preview.
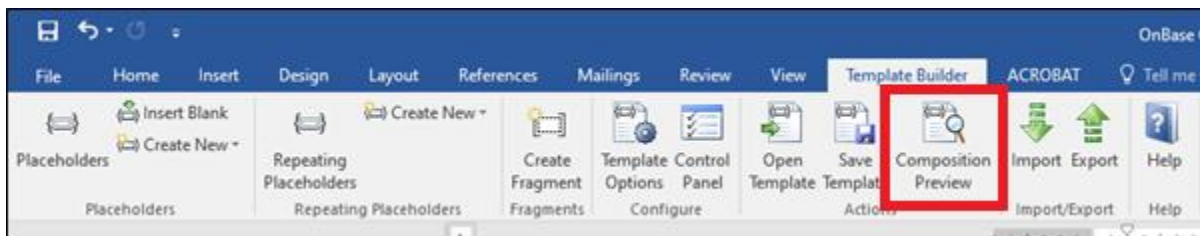
This can be used to test the template using existing documents from OnBase. When using this feature to test, the documents are not stored into OnBase, only viewed within Word.

You can also test by using the Compose Document button in the non-production Unity client. Any workflow configuration using the Compose Document action should also be tested prior to migration to production.

Migrating Templates

Templates can be imported and exported from the Template Builder tab in Word. However, only one environment's Template Builder can be enabled at one time. You can un-install and re-install the template builder or use Configuration or Studio to import to the destination environment.

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