OnBase Guide - ShareBase Integration with Workflow

Goal: To use ShareBase functionality within OnBase workflow

Complexity Level: Departmental Workflow Developers

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Table of Contents

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Background

ShareBase is a cloud-based file-sharing product by Hyland, similar to products like OneDrive or Google Docs but with improved organizational control over the content. This allows for sharing content within and outside an organization.

Since ShareBase is a Hyland product, it can be integrated with OnBase to allow sharing of content that is currently stored in OnBase and this can become an automated part of your business process. Content uploaded to ShareBase by external users can also be imported to OnBase document types automatically, including keyword values based on the ShareBase folder the content was uploaded to.

There are 4 workflow actions related to ShareBase to enable these features:
- Create ShareBase folders
- Add existing OnBase documents to ShareBase folders
- Set a property value with the ShareBase folder path (to include in a notification)
- Delete ShareBase folders when they are no longer needed.

With this workflow integration, a link to a ShareBase folder can be sent to students, parents, faculty/staff or others without OnBase access (external users) in a workflow notification to provide them with:
- Access to documents added to the ShareBase folder, with the following options:
    - Password protection on the ShareBase folder
    - Expiration of access to the ShareBase folder at a specified time
    - Allow or disallow download of documents in the ShareBase folder
- The ability to upload documents to the folder, which will then be imported to OnBase in the specified document type (and can inherit keyword values or be routed to a scan queue)

This will require an existing document in OnBase that can be routed through the workflow.

While the terminology is similar, ShareBase folders are not related to the Folders & Filing Cabinets functionality in OnBase.

There is not a limit to the number of folders that can be created or the number of documents that can be uploaded in ShareBase. There is a 5 GB file size limit per file.

Prerequisites, Training and Resources

In order to configure a workflow integration with ShareBase, you must be a member of the *Functional - Developer - Workflow* user group and familiar with workflow

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configuration. You'll also need to have OnBase Studio installed (refer to the [OnBase Client Guides](#) for instructions).

Before configuring a workflow integration with ShareBase, complete the [OnBase Interaction with ShareBase](#) training course (approximately one hour).

As always, be sure to configure and test in non-production OnBase prior to [migration](#) to production OnBase. There is only one ShareBase environment, more details are below.

For more information, you can reference:
- [ShareBase Community Page](#)
- OnBase Interaction with ShareBase MRG
- [ShareBase training course](#)
- ShareBase MRG
- Workflow MRG

Contact UIS_DM_support@cu.edu for assistance or with any questions.

Configuration in ShareBase

Libraries within ShareBase are containers for ShareBase folders and can only contain folders. ShareBase folders are containers for documents and for other folders.

Each department will have their own Library within ShareBase (this should roughly align with OnBase disk groups and the same name can be used for both if desired).

Getting a Departmental ShareBase Account

Each department will have a ShareBase account to use for interaction with OnBase, this allows for department-specific reporting within ShareBase based on activity from each user account.

UIS will need to set up the account, please contact UIS_DM_Support@cu.edu with the email address you want to use for the account and we will create your account. Once your account is created you will be able to log in to ShareBase directly and manage your library.
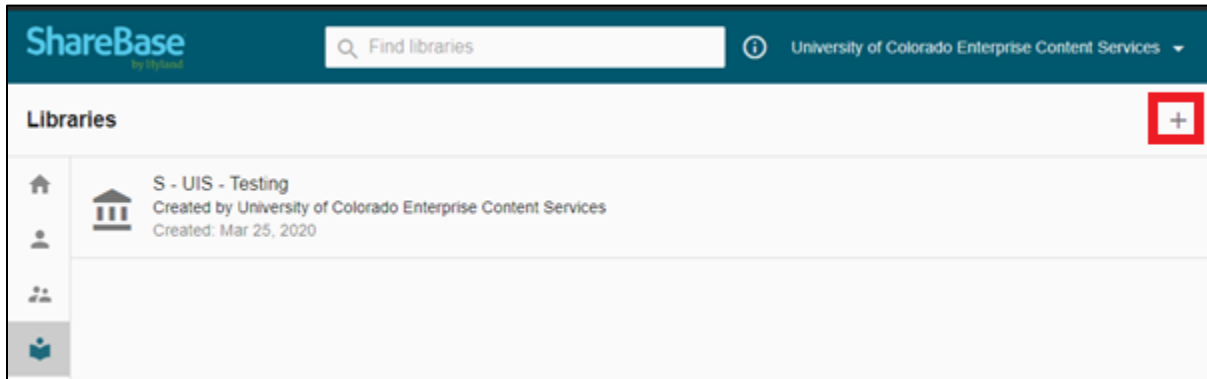
External users accessing ShareBase folders using a link sent by workflow do not need a ShareBase account.

### *Creating your ShareBase Library*

This step only needs to be completed once. For more details, refer to the ShareBase MRG.

1. Log in to [ShareBase Administration](#)
2. Select Libraries

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3. Click the "+" in the upper right corner.

4. Enter the name of your library. Make sure to follow the OnBase Naming Conventions. IE: libraries should be called "B - ADM - Admissions", "D - FA - Financial Aid", etc.
5. Click Create.
6. From the Libraries list, open your library and whitelist the desired file types, then save your changes.
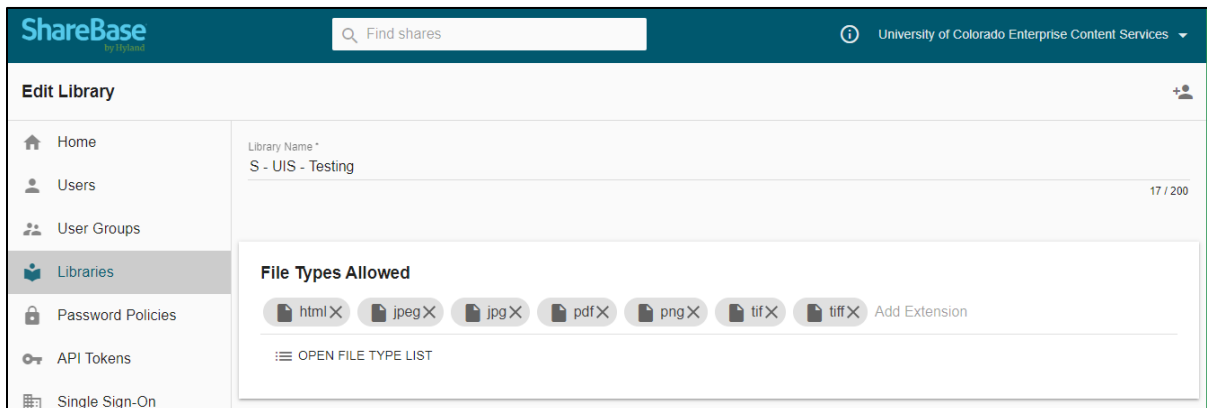
ShareBase Folder Structure

Before configuring any workflow actions, consider the desired folder structure for your department's library.

You do not need to actually create the folder structure in ShareBase (folders can be created by workflow), but you will need to plan to maintain a consistent method of organizing the content to only grant access to view/upload to the correct folders, be able to identify incoming content, and be able to identify folders that should be deleted.

Because we have only one ShareBase environment, it is required that the corresponding OnBase environment be part of the folder path. You can accomplish this using the Read Environment Variable Unity script; this will allow you

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to migrate your configuration between OnBase environments without needing to make changes for environment-specific configuration. This should be the highest-level folder within your library, then all other folder structure will be within these environment folders.

Where possible, your folder path/folder name should use an Employee ID or Student ID. If neither of those values are relevant, be sure to use another value to create a unique path/folder name. The examples below reference students, but this can be substituted as needed.

You'll also need to consider how to identify folders that are no longer needed so they can be removed. For this, you may want to use something like a year > month, or academic year > term, etc.

We also recommend labelling the purpose of the folder in the folder path, i.e. "Share" or "Upload".

Folder Structure Example for Sharing Content

If you will be sharing documents, you could have a folder for each student that contains multiple documents and/or folders. When you share the link to the student's folder, they will have access to all documents in the folder, other folders in the folder, and the contents of those folders.
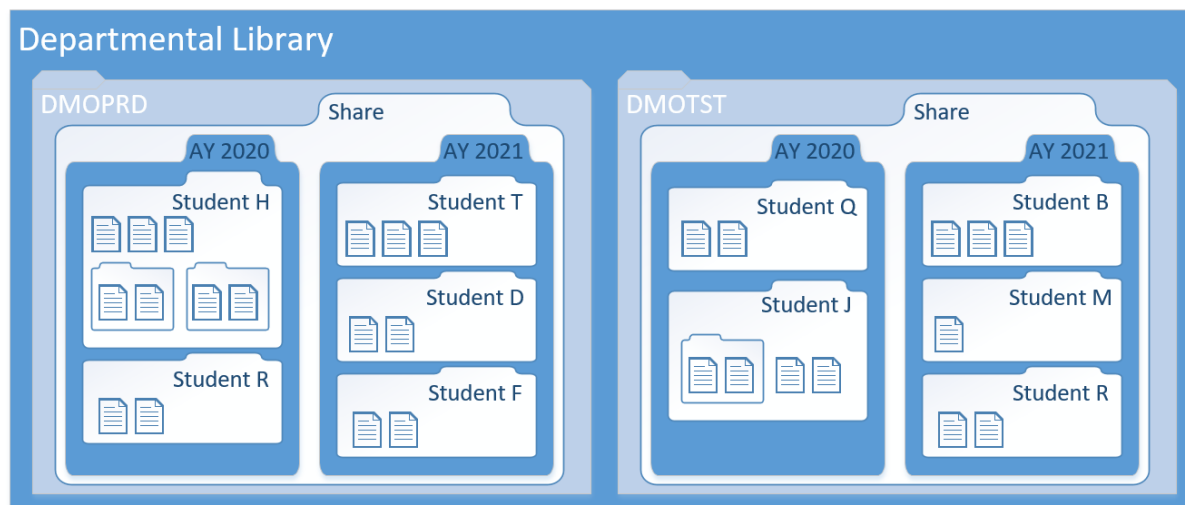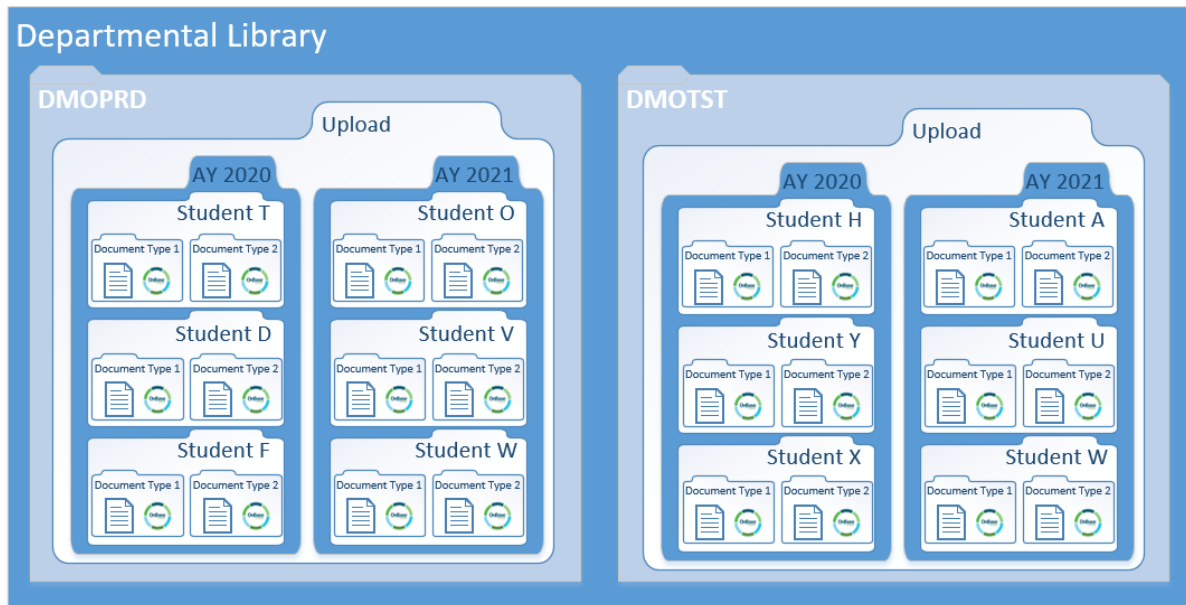

Folder Structure Example for External Users to Upload Content

When requesting documents for upload, you will need to direct the user to the exact folder where they will upload the document. If you have a student folder with child folders for different document types and send a link to the student folder, any uploads will go to the student folder and not the individual document type folders. So to have uploads to multiple document types, you would need to create multiple folders and send multiple links (which can be in the same notification).

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Alternatively, you can link to one folder so all items are imported to one document type and re-index items in a scan queue or workflow.

It's recommended to review any content imported through ShareBase regardless of the folder structure, to ensure content is stored in the correct location and that the correct content has been provided.

Folder Structure Example for Both Sharing and Uploading

If you will be both sharing content with and requesting documents from external users, your first level of folders should be for each environment, then within that a Share folder and Upload folder, then within each of those, the structure that makes the most sense based on your content and folder cleanup plan.

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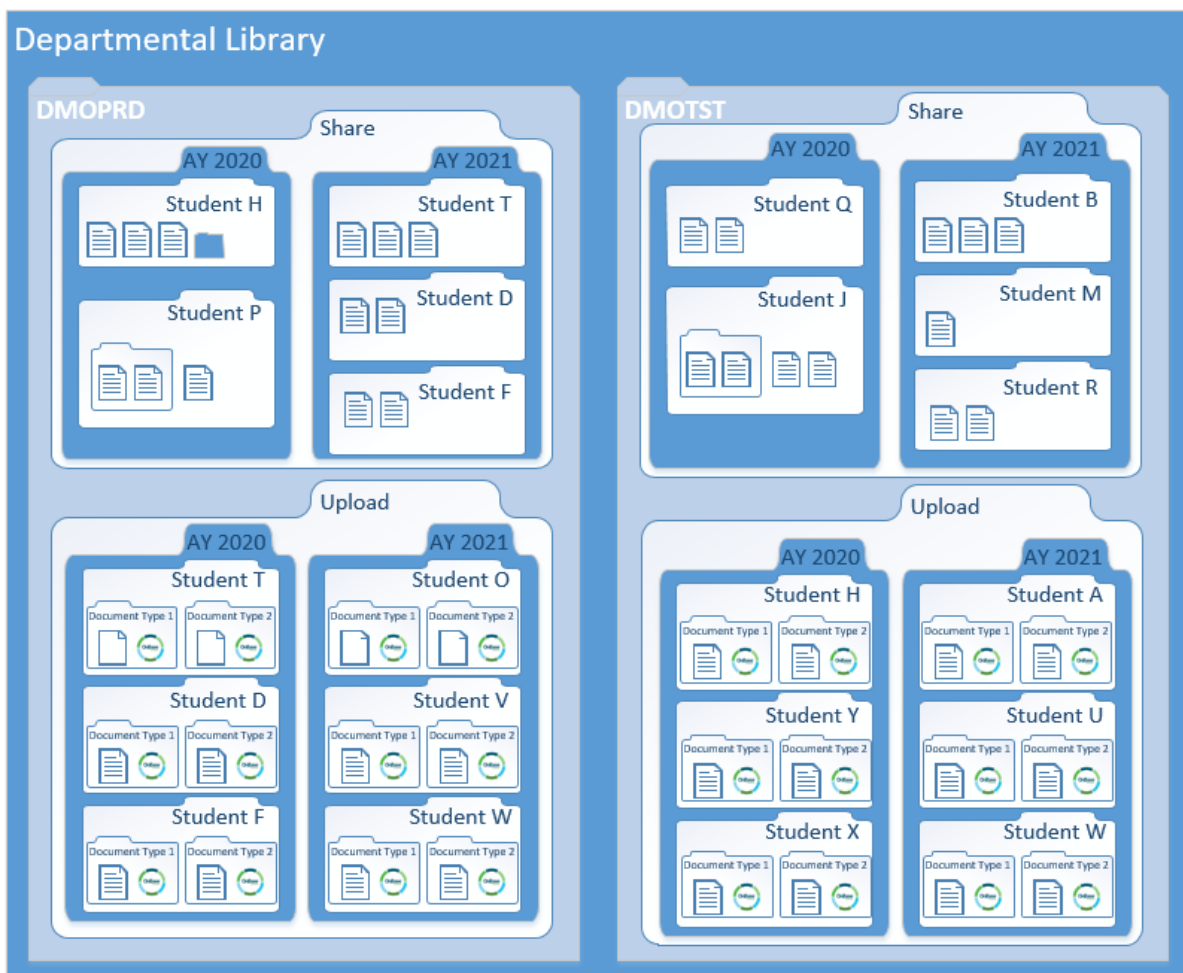
Creating your API Token

This step only needs to be completed once. For more details, refer to the ShareBase Interaction MRG.

1. Log in to ShareBase Administration
2. Select API Token
3. Click the "+" in the upper right corner.
4. Enter the username and password for your department's account and choose Bearer.
5. Click Create.
6. Copy the token to create the ShareBase Profile in Studio. You can use the Copy button to do this. If you highlight the text, make sure to include "Bearer" at the beginning.

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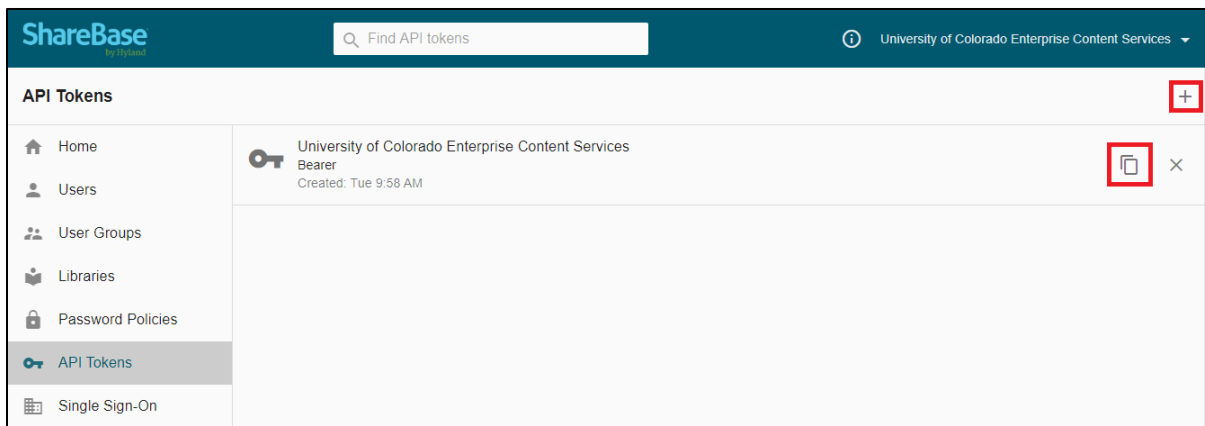
Configuration in Studio (ShareBase Profile)

To connect OnBase workflow with your ShareBase library, you need a ShareBase profile in OnBase Studio.

This step only needs to be completed once per environment. For more details, refer to the ShareBase Interaction MRG.

You will need the API Token from ShareBase.

1. On the Workflow tab, choose ShareBase profiles.
2. Click Add.
3. Enter a name for the profile. Make sure to follow the OnBase Naming Conventions, this can be the same name as your library.
4. Enter the data center URL:

   https://app.sharebase.com/sharebaseapi

5. Paste the API token from ShareBase administration (this should include "Bearer" at the beginning).
6. Choose your department's library as the default library (you may need to refresh).
7. Click OK.

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9
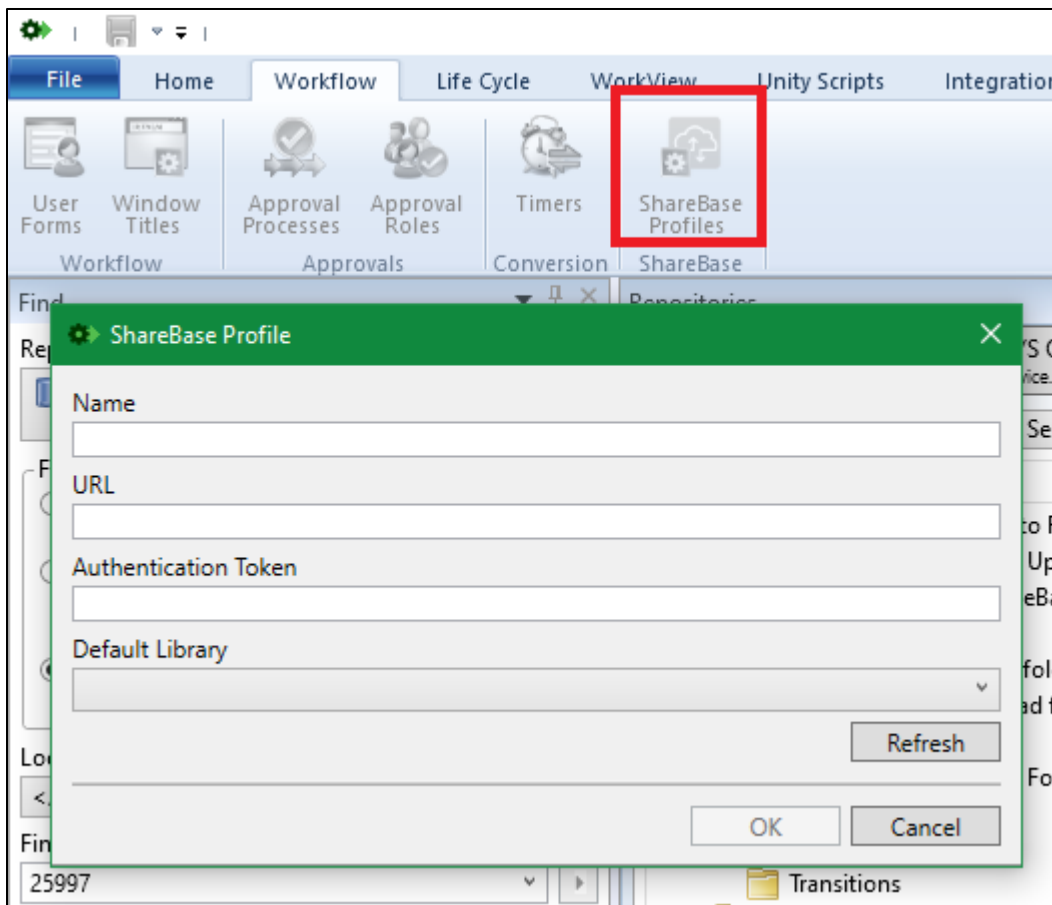
Note: If you migrate the workflow configuration using a ShareBase Profile to an environment where the profile is not configured, the profile will appear in that environment after the import but will need to be re-configured with the URL, Token and Default Library.

Workflow Action Configuration

The following workflow actions can be configured in OnBase Studio.

These steps can be inserted into an existing life cycle at the appropriate location or you can complete the ShareBase processing in a separate life cycle.

To use related items in this process, the life cycle must be a Unity life cycle. Refer to the Workflow MRG for more details on Unity life cycles and converting legacy life cycles to Unity life cycles.

The OnBase environment must be part of the ShareBase folder path; the Read Environment Variable Unity script will make this easy and allow you to migrate your configuration between OnBase environments without needing to make changes for environment-specific configuration.

Make sure to use a consistent property bag throughout the applicable actions.

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1. *Create the ShareBase folder.*
   - Create a new action with action type "**Create ShareBase Folder**".
   - Choose your department's **ShareBase Profile** to access the correct library.
   - Choose your department's **library**.
   - Enter the desired path to the **parent folder**. If the folder already exists, you can browse to it, or you can create it by entering a static name or a property value to use a dynamic value.
     - If using a property value for the parent folder name (to use a folder with a keyword or other property value), set the property value in a separate action prior to this action and use the same property bag.
   - Enter the desired **folder name**. You can enter a static name or use a property value to use a dynamic value.
     - If using a property value for the folder name (to use a folder with a keyword or other property value), set the property value in a separate action prior to this action and use the same property bag.
   - Choose options for the folder.
     - If content added to the folder by external users should be imported to OnBase, check the "**Monitor New Documents**" box.
       - This will enable the **Indexing** configuration tab which will also need to be completed to specify the document type and keyword values used for the content in OnBase.
       - A service imports ShareBase content to OnBase every 10 minutes. Items will remain in the ShareBase folder until they are imported to OnBase then they will be deleted from ShareBase.
       - You can choose to add content imported to OnBase this way to workflow life cycles associated with the document type.
       - Make sure to enable the Upload permission when sharing the link to the folder.

2. *OPTIONAL: Add existing OnBase content (to share that content with an external user).*
   - Create a new action with action type "**Add Document to ShareBase**".
     - It is recommended to configure this action on a timer.
   - Choose whether to add the current document or related document(s).
   - Choose your department's **ShareBase Profile** to access the correct library.
   - Choose your department's **library**.
   - Enter the **path** to the desired folder (not including the folder name). This might be a static name or a property value to use a dynamic value.
     - If using a property value for the path (to use a path with a keyword or other property value), set the property value in a

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separate action prior to this action and use the same property bag.

- o Enter the desired **folder name**. You can enter a static name or use a property value to use a dynamic value.
  - If using a property value for the folder name (to use a folder with a keyword or other property value), set the property value in a separate action prior to this action and use the same property bag.

3. ***Send the link to the ShareBase folder to the desired recipients. They will use this link to access the folder and view/upload their content.***

- o Create a new action with action type "**Set Property to ShareBase Notification Link**".
- o Choose your department's **ShareBase Profile** to access the correct library.
- o Choose your department's **library**.
- o Enter the **path** to the desired folder (not including the folder name). This might be a static name or a property value to use a dynamic value.
  - If using a property value for the path (to use a path with a keyword or other property value), set the property value in a separate action prior to this action and use the same property bag.
- o Enter the desired **folder name**. You can enter a static name or use a property value to use a dynamic value.
  - Make sure you identify a specific folder appropriate for the recipient, as any child folders and their contents will also be included.
  - If using a property value for the folder name (to use a folder with a keyword or other property value), set the property value in a separate action prior to this action and use the same property bag.
- o Choose options for the link
  - Set the link to **expire** after a certain amount of time. This can be a static date, a number of days/hours/minutes after the current time, never, or based on a property value.
    - If using a property value for the link expiration, set the property value in a separate action prior to this action and use the same property bag.
  - Set **Security** for the link
    - Set a **password** for access to the folder.
      - o This password is separate from any OnBase or other campus account information and is only used to grant access to the specified ShareBase folder and its contents.
      - o You will need to provide the password to the user separately or tell them how to determine the

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password (ex. First four digits of student ID + first two letters of last name + 2-digit month and 4-digit year of birth date).

- o The Password must be at least 15 characters long.
- o If using this option, set the property value in a separate action prior to this action and use the same property bag.

- • Or you can use an Email Access Code. See the MRG or documentation in Studio for more information.
- ▪ Set **Rights** for user's interaction with the folder.
  - • Select **View** to share the documents in the folder with the user.
  - • If they should be able to download copies of the documents, select **Download**.
  - • Select **Upload** if you are requesting documents from the external user. Make sure monitoring was configured for the folder on the action that creates the folder.
- ▪ Enter a **name** for the property value in **Save ShareBase Link to Property**. This is the property that will hold the link and be inserted into your notification template.
- o Create a new action with action type "**Send Notification**"
  - ▪ A notification template will need to be configured with a token for the folder URL property set by the previous action. Make sure the appropriate property bag is used.
  - ▪ Make sure the email recipient can be set based on a keyword or property value.

4. ***Delete the ShareBase folder.***
   - o Create a new action with action type "**Delete ShareBase Folder**".
     - ▪ You may wish to have this action on a timer and/or within a rule to delete the folder once the link sent to the external user has expired or after the necessary action has been taken (even if the link has expired, the folder will remain the same and a new link could be created and sent).
   - o Choose your department's **ShareBase Profile** to access the correct library.
   - o Choose your department's **library**.
   - o Enter the **path** to the desired folder (not including the folder name). This might be a static name or a property value to use a dynamic value.
     - ▪ If using a property value for the path (to use a path with a keyword or other property value), set the property value in a separate action prior to this action and use the same property bag.
   - o Enter the desired **folder name**. You can enter a static name or use a property value to use a dynamic value.

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- If using a property value for the folder name (to use a folder with a keyword or other property value), set the property value in a separate action prior to this action and use the same property bag.
- o Choose whether to delete the folder "**only if empty**". By default, content in the folder will also be deleted (including child folders and their contents).

Example Life Cycles

Example life cycles are available for your reference in OnBase Studio:
- **X - SB - ShareBase Example (Share and Upload):** This example is for a scenario where a department is sharing existing OnBase documents with a student using one ShareBase folder and requesting the student upload a document using another ShareBase folder. A notification is sent to the student with two links to each folder. Then, any content imported to the ShareBase upload folder is routed to a queue for review by staff.
- **X - SB - ShareBase Example (Share Only):** This example is for a scenario where a department is sharing existing OnBase documents with a student using one ShareBase folder.
- **X - SB - ShareBase Example (Upload Only):** This example is for a scenario where a department is requesting the student upload a document using a ShareBase folder. Then, any content imported to ShareBase is routed for review by staff.

Check the Documentation tab of each life cycle element (queue, rule, action) for more explanation on the configuration of the example.

These can be adapted to a variety of situations by either recreating the necessary rules and actions or copying/pasting then modifying.

ShareBase Tips

- In some cases, it will be better to use [FormPop](#) to collect additional form input and/or attachments from external users, for instance if you want to guide users with custom actions and data validation available in Unity forms.
- Convert Unity forms to an image or PDF prior to adding to a ShareBase folder. Unity form documents can be uploaded to ShareBase as an XML file (if you whitelist the XML file type) but can't be interacted with as a form in ShareBase.
- If using related items to import to ShareBase, be sure they are all whitelisted file formats. Failure of any item to import will cause the primary document not to proceed in the workflow.

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- The folder name and OnBase document names will be visible to any users who access the folder. The folder path is not visible, except where users have access to child folders.
- You can identify items created this way by checking the creator (the ShareBase service account, S_ShareBase Monitor Service) if content is being added to the document type from other sources in addition to ShareBase.
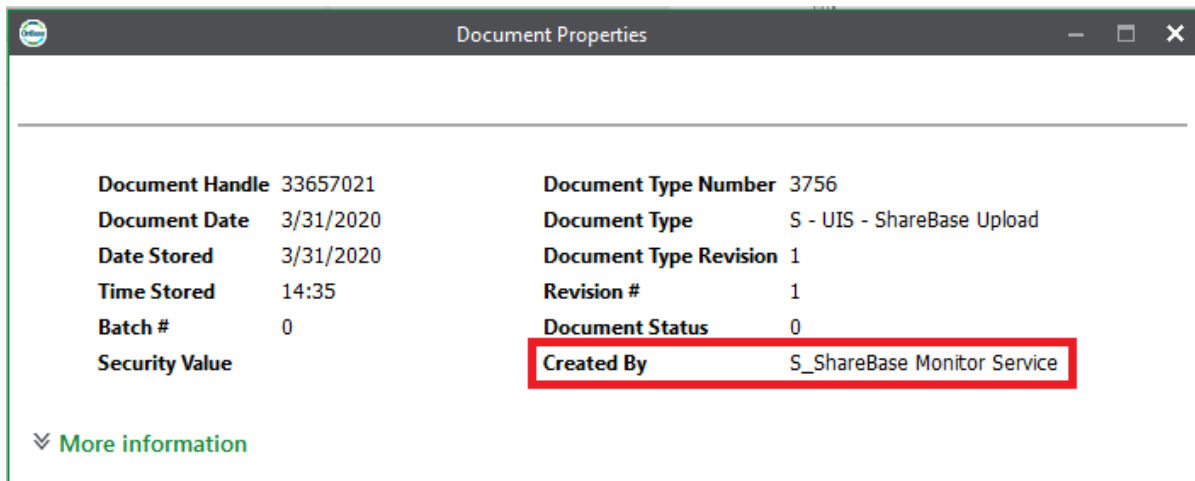
- CU branding appears for external users; our administrative view while logged in with ShareBase accounts will still use default colors.

ShareBase Reports

ShareBase includes a few pre-built report types to review the content that has been shared from your department.

To access these reports, log in to [ShareBase Administration](#) then choose Reports from the menu.

- User Activity Report
  - Choose your departmental user account and date range
  - Displays activity by user account for:
    - Creating folders
    - Deleting folders
    - Creating links to folders
    - Adding documents to folders
    - Purging folders
    - Viewing documents and logging in
- Share by Link Report
  - Choose a date range
  - Displays
    - Links to folders and documents
    - Link Creation/Expiration Date
    - View/Upload rights

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- Sort by the Created By user to find your items

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