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OnBase by Hyland

OnBase Guide - Unity Script - Reverse AFKS Search

Goal: To find the primary value in an AutoFill Keyword set based on one or more secondary values, using a Workflow script.

Complexity Level: Departmental Workflow Developers

8/16/2022

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Background

AutoFill Keyword Sets use a primary value (for example, student ID) to populate other, secondary keyword values (for example, first name, last name and date of birth) when indexing documents.

Reverse AutoFill Keyword Sets allow users to search for the primary value based on the secondary value(s). However, there is not an existing Workflow action to perform this function. Instead, a Unity script exists to provide this option in your processing.

This script is not meant to be a replacement for Search Match processing, which is much more robust. If you have a use case appropriate for Search Match, please use that instead.

Prerequisites

You must have OnBase Studio installed and know how to configure a life cycle. Refer to the OnBase Client Guides for instructions on installation and to the Workflow MRG for more details as necessary.

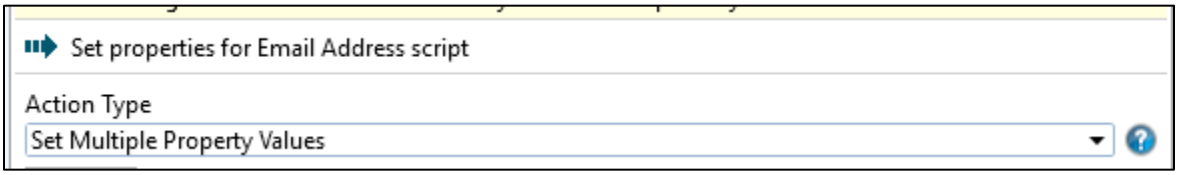
Refer to the handbook for general information on Unity script usage in Workflow and more information on properties.

Contact UIS_DM_Support@cu.edu for assistance if needed.

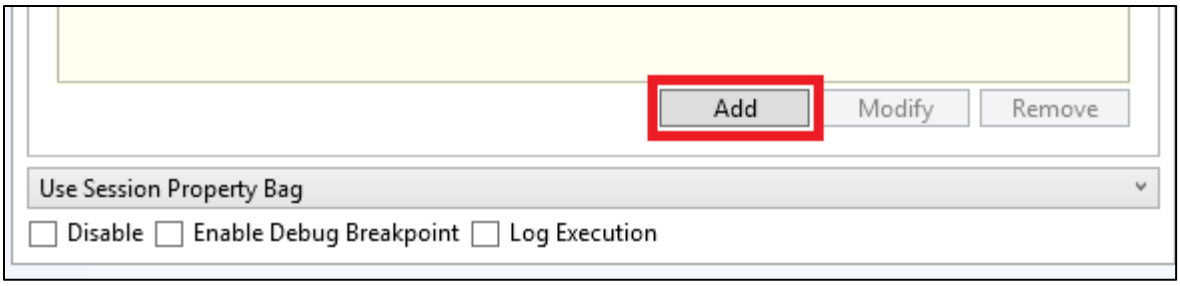
Workflow Configuration

Set Property Values Needed for the Script

Create an action and choose the **Set Multiple Property Values** action type.



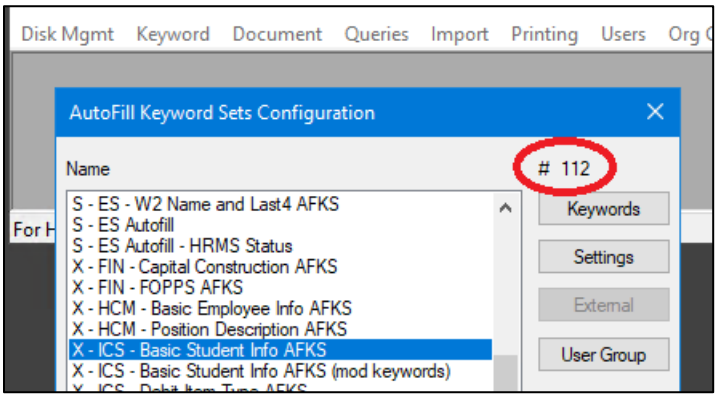
Click **Add** at the bottom of the panel at the right side to add each new property value.



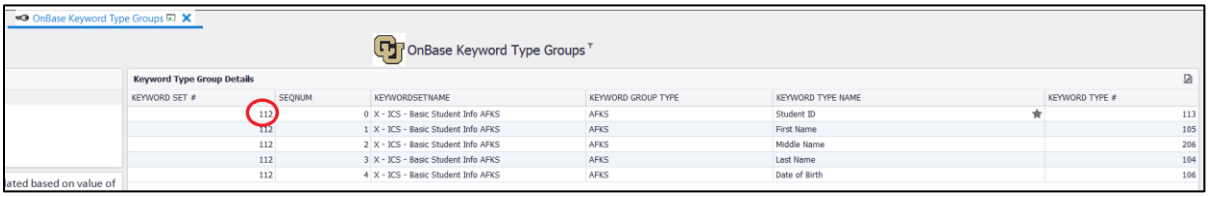
Three inputs are required for the Reverse AFKS script to run.

- propAFKSnum
- propSearchKWType
- propSearchKWValue

The **propAFKSnum** property needs to be set to the unique ID assigned to the AFKS in Configuration. You can find the ID by going to Configuration > Keywords > AutoFill Keyword Sets then selecting the desired AFKS. The ID will appear in the upper right corner.



Alternatively, you can use the OnBase Keyword Type Groups dashboard in the Configuration - Keywords category.



Keep in mind that with new AFKS, the ID may be different between environments.

The **propSearchKWType** property needs to be set to the name(s) of the secondary keyword type(s) you are using to search.

- If using more than one keyword type to search, separate the names with "|" (no space), ex: propSearchKWType = First Name|Last Name|Date of Birth.

The **propSearchKWValue** property needs to be set to the value(s) of the secondary keyword type(s) you are using to search.

- If using more than one keyword type to search, the number of keyword *values* must match the number of keyword *types*. Separate the values with "|" (no space). For example, with the propSearchKWType value above, you'd want propSearchKWValue to end up with a value like: John|Smith|1901-01-01. So your property would be set as: %K00105+"|"+%K00104+"|"+formatdatetime(%K00106; "yyyy-MM-dd")
- You can set the value of propSearchKWValue with an expression (instead of using "Set Multiple Property Values") if you prefer, or if necessary to get the correct formatting.
- Depending on how you set the value, you may need to mark the "parse tokens" option.
- To match date keyword values from AFKS using PeopleSoft data, use the format yyyy-MM-dd.

This set of input values:

- propAFKSnum = 112
- propSearchKWType = First Name|Last Name|Date of Birth
- propSearchKWValue = %K00105+"|"+%K00104+"|"+formatdatetime(%K00106; "yyyy-MM-dd")

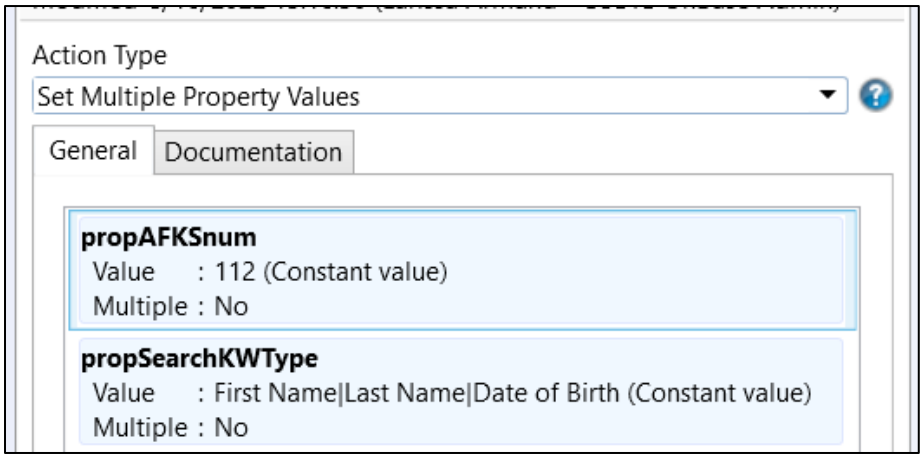
on a document with keyword values of:

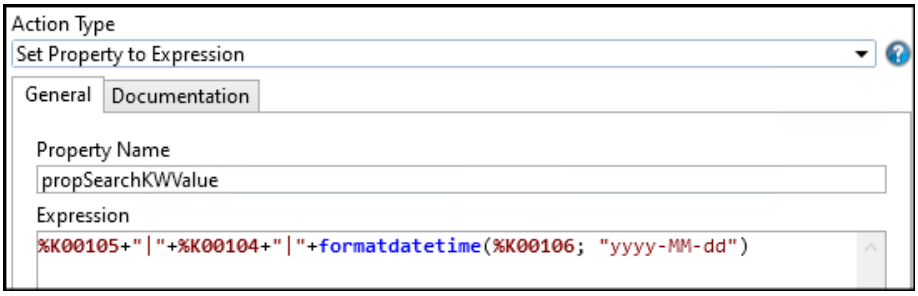
- First Name = John
- Last Name = Smith
- DOB = 1/1/1901

would result in:

- propSearchKWValue = John|Smith|1901-01-01

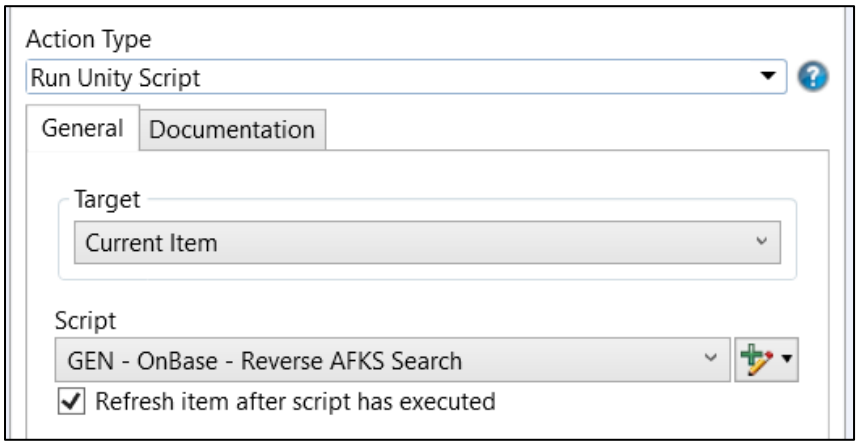
and would search the Basic Student Info AFKS for Student ID records where First Name = John, Last Name = Smith and Date of Birth = January 1, 1901.





Run the Script

Create a “Run Unity Script” action. Select “GEN - OnBase - Reverse AFKS” from the list of available scripts. Check the box to Refresh item after script has executed.



When the script runs, it will update the **propPrimaryKWValue** property value with the current environment name.

Use the Script Results

Once the script has set the output property value, **propPrimaryKWValue**, you can then use it in whatever rules or actions suit your process. That could mean setting a keyword value, checking if multiple values were returned, etc.

If the supplied criteria return more than one result from the AFKS table, they will be formatted in the same way as the input values, ex: value 1|value 2.