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![OnBase by Hyland]

OnBase Guide - Workflow in Microsoft Outlook

Goal: To utilize the Workflow features and functionality available in Microsoft Outlook

Complexity Level: Departmental Workflow Developers, Functional End Users

4/21/2020

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Background

There are a variety of Workflow features available to users in Microsoft Outlook or which can be used in conjunction with Outlook when used to receive emails.

Some of these features require the Outlook Integration for OnBase. Users can install this without administrator privileges. Refer to the OnBase Web URLs and Unity Client ClickOnce URLs document for further details.

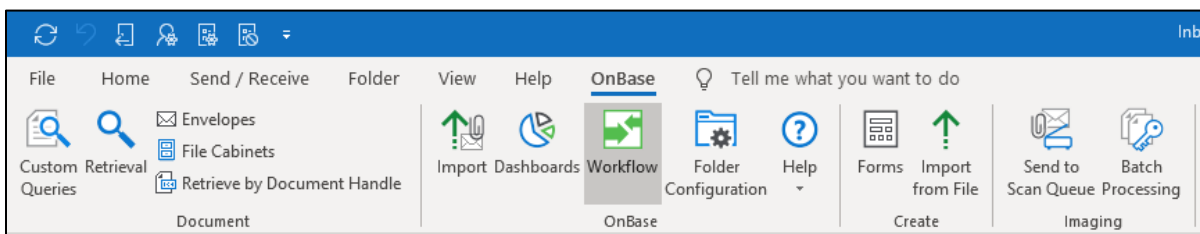For more information on any of these features, refer to the OnBase Training page and the applicable MRGs.

WorkflowPop

WorkflowPop can be used to send a link to a user in a notification, which will direct them to a specific life cycle and queue and (if desired) a specific document within that queue. WorkflowPop uses a web viewer for display, this does not require any installation of the Outlook integration.

More information on WorkflowPop is available in the Workflow - Notifications - DocPop/WorkflowPop guide.

Open Workflow Layout

Once logged in to the Outlook integration, users can open the Workflow layout in a new window by clicking the Workflow button on the OnBase tab of the menu. From here, regular workflow functionality will be available as if they had gone to workflow from the Unity client.

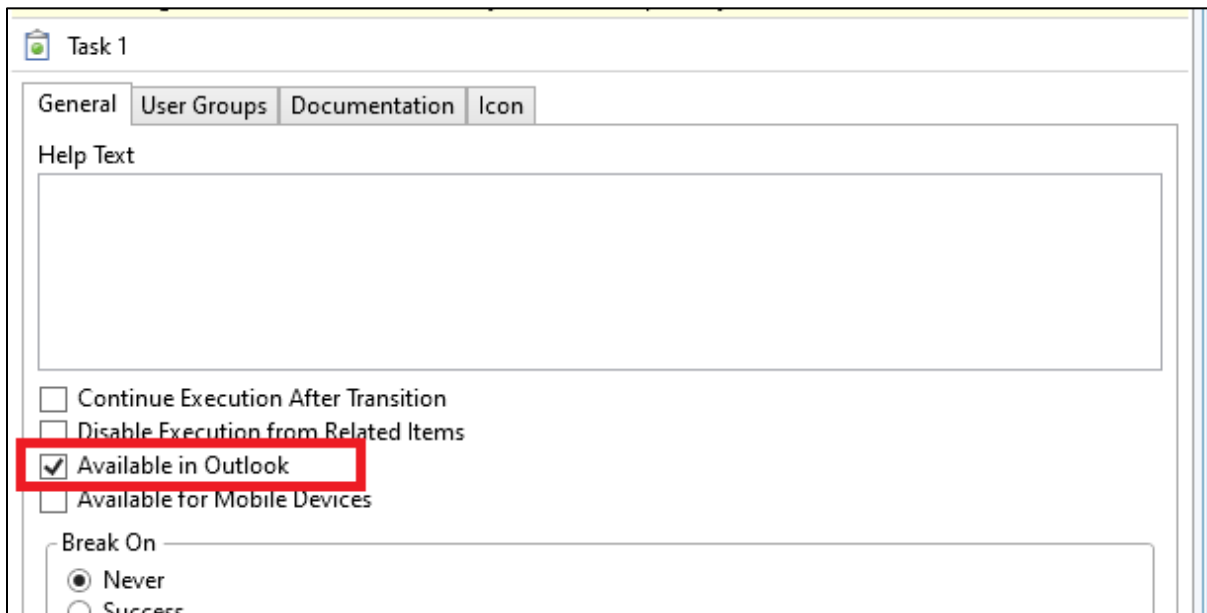# Executing Tasks within an Email Notification

Users with the integration installed can execute tasks and view the associated document within an email notification.
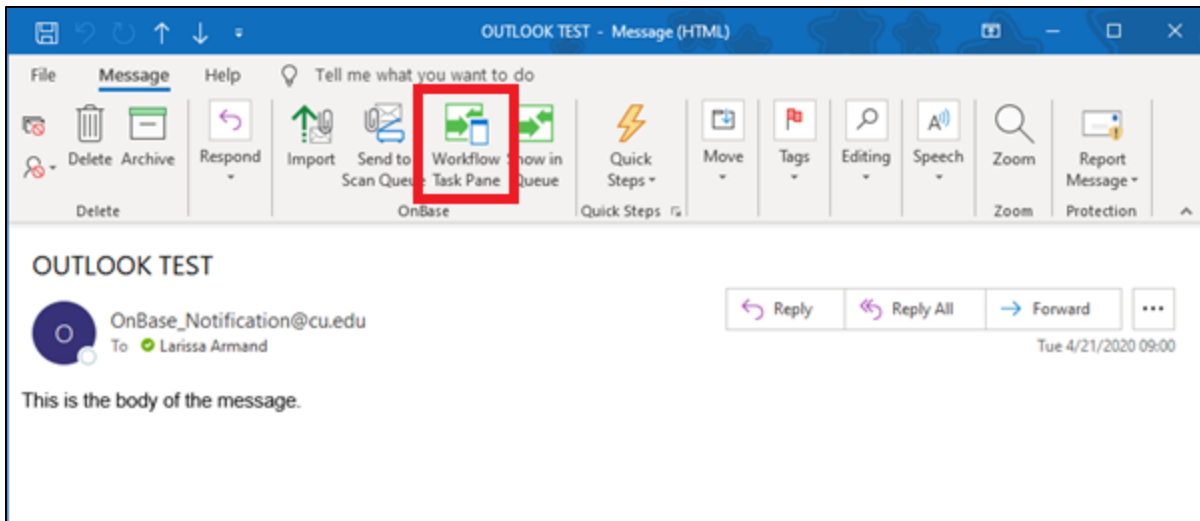
To enable this, in Studio:
- Check the box for "Add Outlook Header" on the Settings tab of the Notification configuration.

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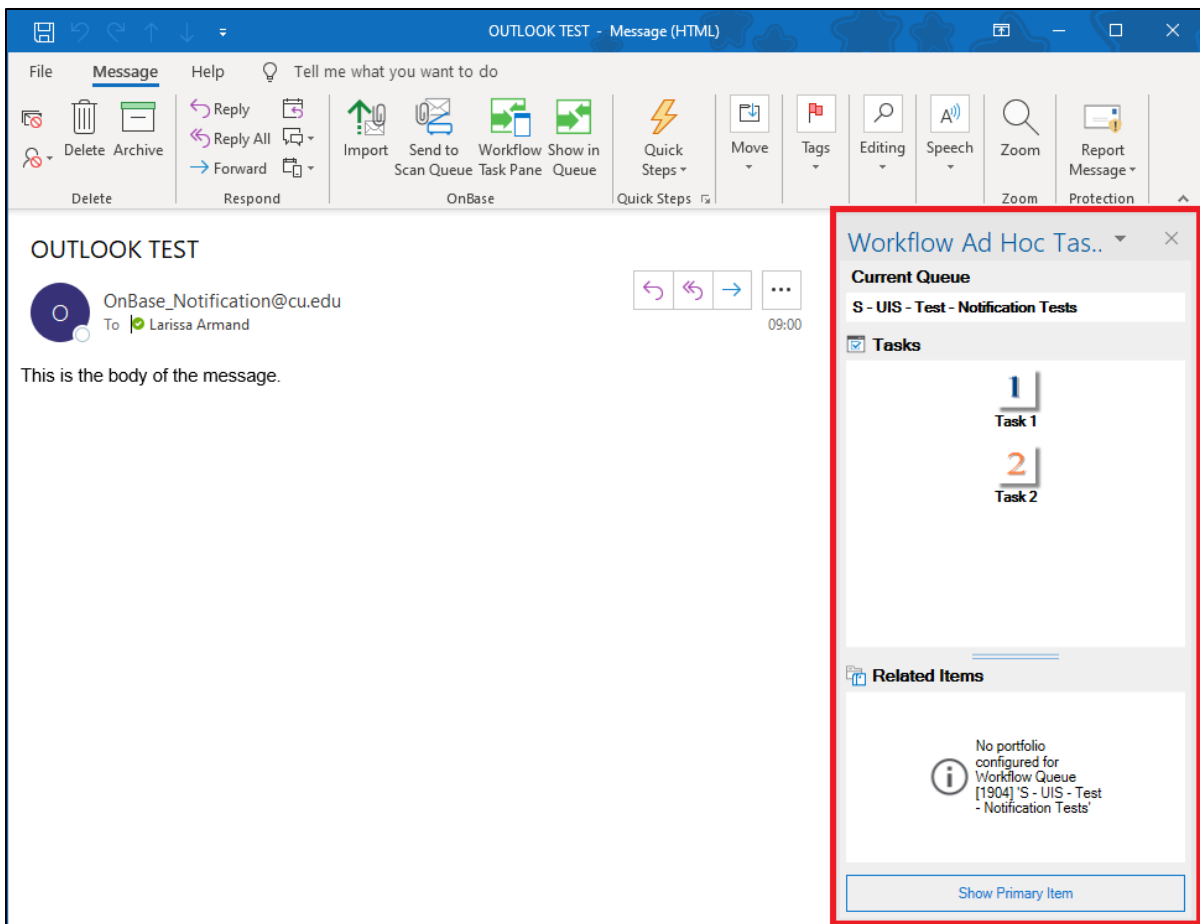Boulder | Colorado Springs | Denver | Anschutz Medical Campus

- Make sure the "Available in Outlook" option is selected on any applicable tasks (this should be selected by default).
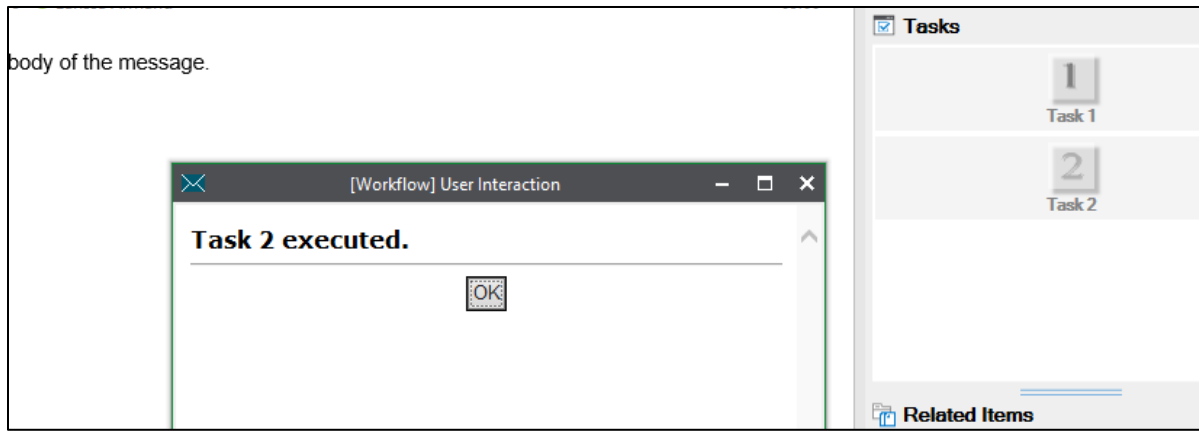

When the user receives the notification, they will need to open it (in its own window, not just in the message preview pane). They will then have an option to open the task pane where they can view the document or execute the available tasks:

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When the Workflow Task Pane opens, any available ad hoc tasks will be available. The user can also view related items or use the "Show Primary Item" button to view the item that generated the notification.

If the user performs a task that requires user interaction, a new window will open to display the user interaction pane.

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After executing a task, the activity is logged in the body of the email so that users can see which items in their inbox have already been processed.

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