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## OnBase Guide - Workflow - Real-Time Checklist

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**Goal:** To use the Real-Time Checklist Workflow  
Functionality in OnBase

**Complexity Level:** Departmental Workflow Developers

2/18/2025



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## Background

OnBase and PeopleSoft Campus Solutions have been integrated to provide real-time checklist creation and updates. This guide will provide the requirements for utilizing the real-time checklist functionality in OnBase workflow.

In OnBase workflow, a document can live in multiple life cycles at the same time. The checklist update process takes advantage of that ability to have the document stay in the original life cycle while simultaneously also being processed in the central Checklist Update life cycle managed by UIS. This central life cycle performs the processing and can be used by departments rather than reconfiguring all those steps elsewhere.

The basic process for invoking the real-time checklist update process boils down to three discrete steps.

1. Add the document from the original life cycle to the central Checklist Update life cycle, but do not remove the document from the original departmental life cycle. The document stays in the same queue in the original life cycle until the checklist process is complete.
2. Run a timer in the original life cycle to determine when the Checklist Update life cycle process has completed.
3. Check for any errors and handle as necessary.

**NOTE:** Web services perform updates in the Campus Solutions environment corresponding to the OnBase environment (DMODEV connects to ICSDEV, DMOTST to ICSTST, etc.). Certain conditions may need to exist in the corresponding Campus Solutions environment for successful testing.

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## Notes about PeopleSoft Checklists

PeopleSoft Checklists are made up of multiple distinct sets of values to function correctly. If any one of these is not set up correctly the checklist integration will not function.

All the values listed below are set with OnBase Keywords prior to executing the Checklist Integration workflow. Those keywords are defined later in this document.

- Checklist Admin Function
  - ADMA, FINA, FINT, SENR, etc.
- Checklist
- Checklist Item
- Checklist Item Code
  - A Processing
  - C Completed



- F Incomplete
- G Signature Required
- I Initiated
- N Notified
- O Ordered
- P Paid Off
- R Received
- S Second Notification
- T Returned
- W Waived
- X Cancelled
- Variable Data Elements
  - Aid Year, Term Code, Academic Career, Student Career Number, etc.
- Standard Data Elements:
  - Student ID
  - Academic Institution (CUBLD, CUDEN, CUSPG)

The **Checklist** itself is the primary “parent” configuration, the **Checklist Items** are the “children” of those parents. You can have many **Checklist Items** setup under a single **Checklist**.

- Most often what you will see is a single **Checklist Item** under a **Checklist**, both with the same name.

**Checklist Items** can have several statuses as seen above, but the **Checklist** itself only has two, “Complete” and “Initiated” (incomplete).



## Updating existing Checklists/Checklist Items

This integration is not directly updating the Checklist status itself, its only updating the Checklist Item status. The Checklist will get updated based upon the following conditions.

- When you use this integration to update a Checklist Item to “complete” and all other Checklist Items under that Checklist are complete. PeopleSoft will update the Checklist to “complete” as well.
- If a Checklist Item has been updated as “complete” but all other Checklist Items are not in a “complete” status, the Checklist itself will stay in an “Initiated” (incomplete) status.
- All Checklist items must be in a “complete” state before the Checklist will be set to “complete”.

## Creating new Checklists/Checklist Items

If a Checklist and Checklist Item do not exist for a student, this integration will create both the Checklist and Checklist item and set the Status for both the Checklist Item and the Checklist per the rules above.

- IE: All Checklist Items must be “complete” for the Checklist to be marked as “complete”, otherwise the Checklist will be set as “Initiated” (incomplete).

Below is an example of a Checklist with two Checklist Items assigned to it. Since both Checklist Items are in a “Initiated” status, the Checklist itself is in an “Initiated” (incomplete) status.

Home > Build Community > Checklists > Use > Checklist Management - Person

Checklist Management 1 Checklist Management 2

Hashim Bali ID: FA0138

Checklist Date Time: 02/10/2000 9:14:18AM

Administrative Function: Loan Status: Initiated

Academic Institution: PeopleSoft University Status Date: 02/10/2000

Checklist Code: Direct Loan Promissory Note Due Date: 02/10/2000

**Checklist Items**

*Sequence	*Item	*Status	*Status Date	*Due Date	
100	PNOTE P Note	Initiated	02/10/2000	02/10/2000	+ -
Responsible ID: <input type="text"/>		Name: <input type="text"/>			
200	TIL TIL	Initiated	02/10/2000	02/10/2000	+ -
Responsible ID: <input type="text"/>		Name: <input type="text"/>			

Save Return to Search Next in List Previous in List Add Update/Display



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## Prerequisites

To create and configure the components for this integration you will need to use the following OnBase tools:

1. OnBase Configuration
2. OnBase Studio
3. OnBase Unity Management Console

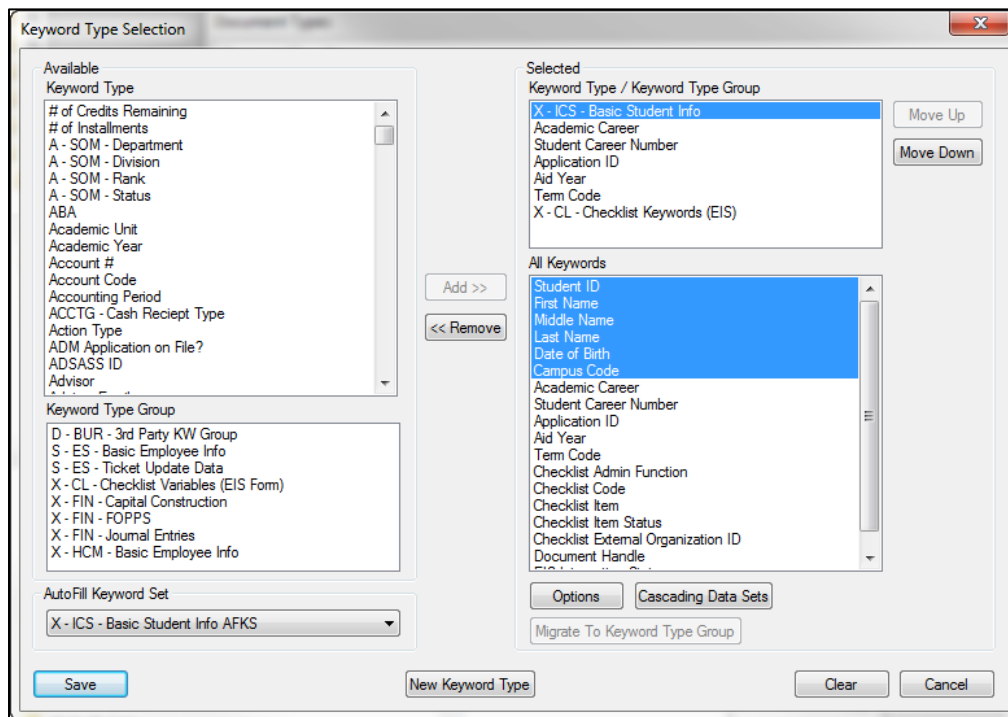
Please reference other [UIS guides](#) for installation instructions and configuring each of the products. The Workflow and Unity Scheduler MRGs also provide further details. Contact [UIS\\_DM\\_Support@cu.edu](mailto:UIS_DM_Support@cu.edu) for assistance if needed.

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## Steps to Complete in OnBase Configuration

To use the OnBase Checklist Update functionality, there are some configuration steps you need to complete in OnBase Configuration. Refer to the System Administration MRG for additional information if necessary.

1. Create a Document Type for the original document (if it does not already exist).
2. Apply the *X - ICS - Basic Student Info* keyword type group to the document type (if it is not already). This will apply the basic student keywords for student documents.



3. Apply the *X - CL - Checklist Keywords (EIS)* keyword type group to the document type. This will apply the keywords necessary for the integration to work.

NOTE: If you have already applied any of the keywords from the 'X - CL - Checklist Keywords (EIS)' keyword group to the document type, you can add the rest individually as needed. The following keyword types all need to be present for the integration to work.

- Checklist Admin Function
- Checklist Code
- Checklist Item
- Checklist Item Status
- Checklist External Organization ID
- Document Handle
- EIS Integration Status

4. Add any additional keyword types that are necessary (depending on the Checklist Admin Function) to the document type.

Checklist Type	Required Keyword Values
ADMA	<ul style="list-style-type: none"> <li>• Academic Career</li> <li>• Student Career Number</li> <li>• Application ID</li> </ul>
FINA	<ul style="list-style-type: none"> <li>• Aid Year</li> </ul>
FINT	<ul style="list-style-type: none"> <li>• Aid Year</li> <li>• Term Code</li> </ul>



SENR	<ul style="list-style-type: none"> <li>• Academic Career</li> <li>• Term Code</li> <li>• Class Number</li> </ul>
SPRG	<ul style="list-style-type: none"> <li>• Academic Career</li> <li>• Student Career Number</li> <li>• Term Code (OPTIONAL)</li> <li>• ICS Checklist Origin (OPTIONAL)</li> </ul>

5. If desired, reorder the keyword types using the **Move Up** and **Move Down** buttons.
6. You can also preset default checklist keyword values for documents added to the document type and/or make some of the keywords hidden to end users if you wish.

Alternatively, you can skip to the next step and set the checklist keyword values in your own workflow prior to submitting the document to the Base Checklist life cycle.

- a. To set the default checklist keyword values for the document type, select the **Options** button below the list of selected keyword types.





**Keyword Type Selection**

**Available**

Keyword Type

- # of Credits Remaining
- # of Installments
- A - SOM - Department
- A - SOM - Division
- A - SOM - Rank
- A - SOM - Status
- ABA
- Academic Unit
- Academic Year
- Account #
- Account Code
- Accounting Period
- ACCTG - Cash Receipt Type
- Action Type
- ADM Application on File?
- ADSASS ID
- Advisor

Keyword Type Group

- D - BUR - 3rd Party KW Group
- S - ES - Basic Employee Info
- S - ES - Ticket Update Data
- X - CL - Checklist Variables (EIS Form)
- X - FIN - Capital Construction
- X - FIN - FOPPS
- X - FIN - Journal Entries
- X - HCM - Basic Employee Info

AutoFill Keyword Set

X - ICS - Basic Student Info AFKS

**Selected**

Keyword Type / Keyword Type Group

- X - ICS - Basic Student Info
- Academic Career
- Student Career Number
- Application ID
- Aid Year
- Term Code
- X - CL - Checklist Keywords (EIS)

**All Keywords**

- Student ID
- First Name
- Middle Name
- Last Name
- Date of Birth
- Campus Code
- Academic Career
- Student Career Number
- Application ID
- Aid Year
- Term Code
- Checklist Admin Function
- Checklist Code
- Checklist Item
- Checklist Item Status
- Checklist External Organization ID
- Document Handle

Options Cascading Data Sets

Migrate To Keyword Type Group

Save New Keyword Type Clear Cancel

- b. Click in the **Default Keyword Value** column to the right of the keyword type you wish to set a default value for and type the default value.

**Keyword Options**

Keyword Type	UNQ	REQN	REQR	EXDB	EXIDC	HID	RO	Default Keyword Value
Academic Career	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Aid Year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Application ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Campus Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CUBLD
Checklist Admin Function	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINA
Checklist Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GLABEL
Checklist External Organization ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Checklist Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GLABEL
Checklist Item Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Document Handle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
EIS Integration Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Hide Descriptions Close

UNQ - Keyword is used to determine uniqueness of new documents  
 REQN - Keyword field is required for new documents  
 REQR - Keyword field is required for Retrieve Dialog Queries  
 EXDB - Exclude from double blind indexing  
 EXIDC - Exclude from Interactive Data Capture  
 HID - Hidden unless the user has Access Restricted Keywords privilege  
 RO - Read only unless the user has Access Restricted Keywords privilege

- c. If you are concerned about these keywords being visible to your users, you can choose to hide the checklist keywords as well. Just check the "HID" box next to each keyword type as desired.



Keyword Type	UNQ	REQN	REQR	EXDB	EXID	HID	RO	Default Keyword Value
Academic Career	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Aid Year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Application ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Campus Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CUBLD
Checklist Admin Function	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FINA
Checklist Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	GLABEL
Checklist External Organization ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Checklist Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	GLABEL
Checklist Item Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Document Handle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EIS Integration Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Buttons: Show Descriptions, Close

d. Click **Close** when done.

7. Once all of your keyword type changes are complete, click **Save**.

**Keyword Type Selection**

**Available**

Keyword Type

- # of Credits Remaining
- # of Installments
- A - SOM - Department
- A - SOM - Division
- A - SOM - Rank
- A - SOM - Status
- ABA
- Academic Unit
- Academic Year
- Account #
- Account Code
- Accounting Period
- ACCTG - Cash Receipt Type
- Action Type
- ADM Application on File?
- ADSASS ID
- Advisor

Keyword Type Group

- D - BUR - 3rd Party KW Group
- S - ES - Basic Employee Info
- S - ES - Ticket Update Data
- X - CL - Checklist Variables (EIS Form)
- X - FIN - Capital Construction
- X - FIN - FOPPS
- X - FIN - Journal Entries
- X - HCM - Basic Employee Info

AutoFill Keyword Set

X - ICS - Basic Student Info AFKS

**Selected**

Keyword Type / Keyword Type Group

- X - ICS - Basic Student Info
- Academic Career
- Student Career Number
- Application ID
- Aid Year
- Term Code
- X - CL - Checklist Keywords (EIS)

**All Keywords**

- Student ID
- First Name
- Middle Name
- Last Name
- Date of Birth
- Campus Code
- Academic Career
- Student Career Number
- Application ID
- Aid Year
- Term Code
- Checklist Admin Function
- Checklist Code
- Checklist Item
- Checklist Item Status
- Checklist External Organization ID
- Document Handle

Buttons: Add >>, << Remove, Move Up, Move Down, Options, Cascading Data Sets, Migrate To Keyword Type Group, Save, New Keyword Type, Clear, Cancel

This completes all configuration steps necessary in OnBase Configuration.



## Steps to Complete in OnBase Studio

OnBase Studio is the tool where you can create Workflow life cycles, queues, tasks, actions, timers and notifications for your business processes.

The necessary configuration to prepare documents for processing and add them to the primary checklist life cycle is described below. This processing should be added to a queue in the life cycle for your business process, referred to throughout the guide as the “original life cycle”.

### 0. Prepare the document for processing.

If you did not set default values for all checklist-related keyword types based on the document type, set these values using workflow rules and actions.

Since the central Checklist Update life cycle does check for the existence of the required keyword values, you will not have to build that validation into your original life cycle unless you really want to. However, doing so may reduce delays in checklist processing due to missing keyword values.

1. Add the document from the original life cycle to the central Checklist Update life cycle (***X – CL – Checklist Update Integration (EIS)***), but do not remove the document from the original life cycle.

The screenshot shows the configuration window for the 'Add Item to Other Life Cycle' action. The 'Action Type' is set to 'Add Item to Other Life Cycle'. The 'General' tab is selected. The 'Target' is set to 'Current Item'. The 'Life Cycle' is set to 'X - CL - Checklist Update Integration (EIS)'. There is an unchecked checkbox for 'Get Life Cycle from this Property'. The 'Queue' is set to 'CL - Initial'. There is an unchecked checkbox for 'Get Queue from this Property (leave blank to use Initial Queue)'. There is also an unchecked checkbox for 'Use Initial Queue if Property does not exist'.

The document stays in the original life cycle queue until the checklist process is complete (as determined by a timer on that queue). The “Add Item to Other life cycle” action allows the document to stay in the original life cycle while also being processed in the ***X – CL – Checklist Update Integration (EIS)*** life cycle.

This is what triggers the checklist update with PeopleSoft. Once a document has completed its processing in the ***X – CL – Checklist Update***

*Integration (EIS)* life cycle, the 'EIS Integration Status' keyword will contain the result returned by the web service. Here are some examples of the values you can expect to see in the 'EIS Integration Status' keyword for checklists:

- SUCSS: Checklist Added
- SUCSS: Checklist Updated
- ERROR: Checklist Admin Function KW Value Missing
- ERROR: Checklist Code KW Value Missing
- ERROR: Checklist Item KW Value Missing
- ERROR: Checklist Item Status KW Value Missing
- ERROR: Academic Career KW Value Missing
- ERROR: Aid Year KW Value Missing
- ERROR: Application ID KW Value Missing
- ERROR: Student Career Number KW Value Missing
- ERROR: Term Code KW Value Missing
- ERROR: Emplid is not Aid Year Activated
- ERROR: (91.37) - Error saving Component Interface.  
{CU\_HY\_CHKLIST\_MNGMNT\_CI} (91.37)
- ERROR: (91.34) - Error changing value.  
{CU\_HY\_CHKLIST\_MNGMNT\_CI.PERSON\_CHK\_ITEM(1).ITEM\_STATUS} (91.34)
- ERROR: (91.50) - No rows exist for the specified keys. {CU\_HY\_CHKLIST\_MNGMNT\_CI} (91.50)
  - Can indicate missing SACR for the account used

The last few result values indicate issues on the Campus Solution side where the values were not valid or access was missing.

## **2. Run a timer in the original life cycle to determine when the Checklist Update process has completed.**

We cannot guarantee how long the real-time checklist update process will take (usually around 1 second), so we need to have a timer look at the 'EIS Integration Status' keyword value to know when it is okay to continue forward.

The 'EIS Integration Status' keyword will have two primary values after being processed in the central Checklist Update life cycle:

1. SUCSS\*
2. ERROR\*

In the example life cycle, we provide an example rule that looks for a SUCSS\* status in the 'EIS Integration Status' keyword and if true, send the document on its way to the next step or queue in your original life cycle.

Properties

? CL01 - EIS Integration Status = Success? ID: 3871

Created 6/30/2017 12:40:42 PM (Alan Vidmar - CUSYS UIS DM Project Manager)

Modified 6/30/2017 12:40:42 PM (Alan Vidmar - CUSYS UIS DM Project Manager)

Rule Type

Check Keyword Value

General Documentation

Target

Current Item

Keyword Type

EIS Integration Status

Currency Format

Operator

=

Compare To

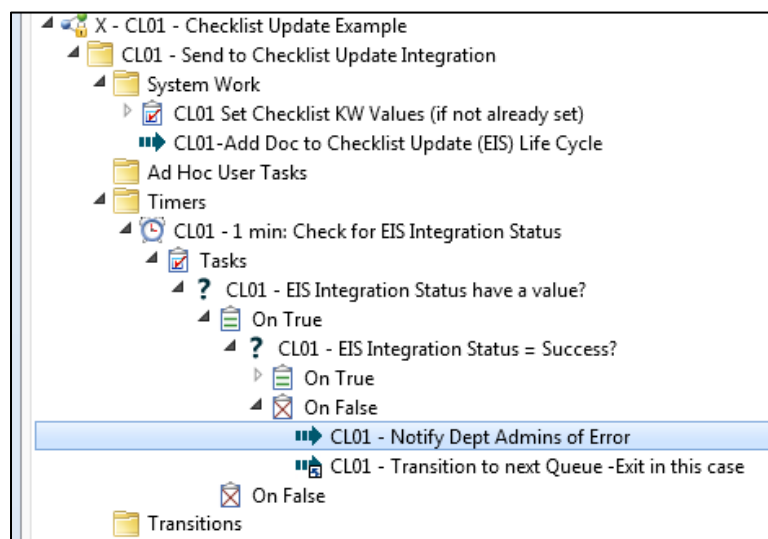
☒ Allow Wildcards

SUCSS\*

Refer to the [Unity Scheduler MRG](#) for more information on configuring scheduler tasks for timers.

### 3. Check for any errors and handle as necessary.

On the error handling side, once the timer sees an ERROR\* value in the EIS Integration Status keyword, the example workflow sends a workflow notification, but you can configure this to your own needs, such as having another queue where you route the original document for manual re-indexing and then re-submission to the central Checklist Update life cycle.

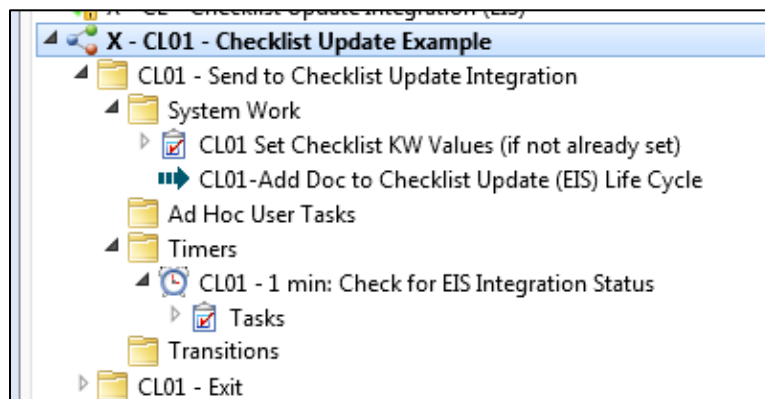


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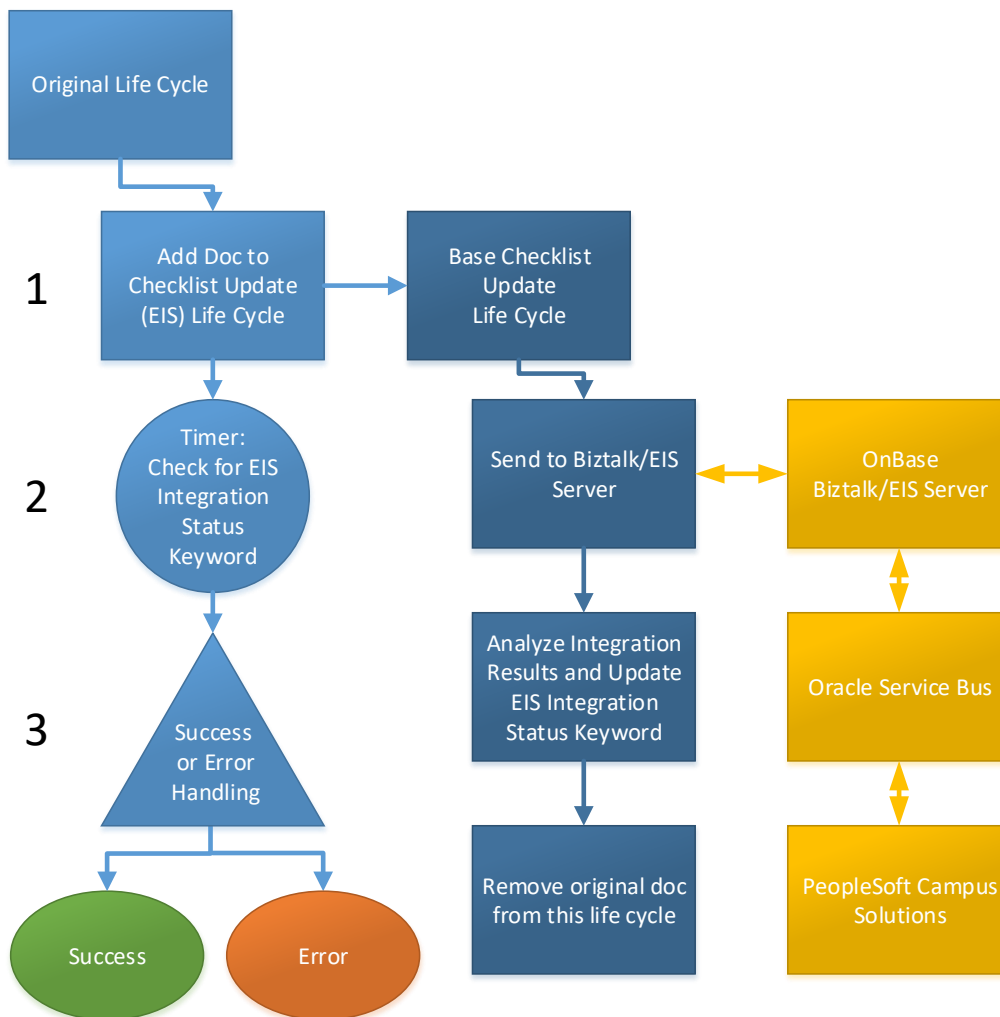
## Example Checklist Life Cycle

In Studio, we have provided an example life cycle that can be used as a reference and copied into your own life cycles where needed.

This example life cycle is called *X - ICS - Example - Checklist Update*. This life cycle has two queues, but only the first one is necessary, as the second queue would be the next step in your original life cycle for your business process.

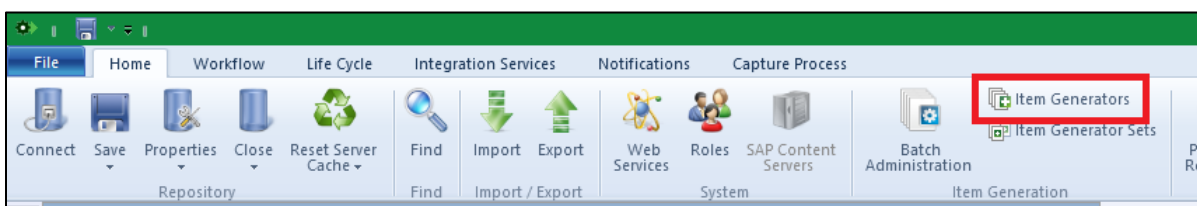


## OnBase Checklist Update Flowchart



## Testing the Solution

Item Generators can be configured to create documents (or other items) in the desired document types and with the desired keyword values. These let you test life cycles in a variety of ways and even specify keyword and property values and the starting queue and entry date. Refer to the Studio MRG for more information on Item Generators.



Certain conditions may need to exist in the corresponding Campus Solutions environment for successful testing.

Please do test in DMOPRD as this will update Checklists in the production Campus Solutions environment.

You can monitor the testing status by looking at your original life cycle and specifically the 'EIS Integration Status' keyword value on each document while in Unity client workflow.