OnBase Guide - Workflow - Service Indicator Integration

**Goal:** To use OnBase to place and/or release Service Indicators in Campus Solutions using OnBase workflow

**Complexity Level:** Departmental Workflow Developers

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Background
This process exists in order to place and release Service Indicators on student accounts in Campus Solutions.

This guide outlines the processing performed by a shared life cycle that completes the processing using a web service to update CS and an example life cycle that you can copy from to incorporate this into your department’s life cycles.

The basic process is:
1. Departmental life cycle creates a Unity form that supplies the necessary information for the SI placement/release.
2. The form is processed by a shared life cycle configured and maintained by UIS. A web service uses the information from the form to perform the requested action.
3. The departmental life cycle checks the result of the web service processing to determine if it was successful.
4. The form used for processing is purged after 10 minutes.

There are many options for how to customize this in your life cycle, so use this guide as a starting point to build a solution that fits your department’s needs.

NOTE: This process will allow workflow users to initiate placement/removal of service indicators without the limitations of their Campus Solutions SACR/access. Please be aware of this and use caution.

Service Indicators placed using this web service will have a Placed Process/Released Process of “ONBASE.”

These transactions can also be reviewed in Audit Service Indicators.

Prerequisites
You will need to use OnBase Studio and be familiar with workflow design and configuration, in addition to having the necessary permissions to do so.

Please reference other UIS guides for installation instructions and configuring each of the products. The Workflow and System Administration MRGs also provide further details. Contact UIS_DM_Support@cu.edu for assistance if needed.
Steps to Complete in OnBase Studio & Example Life Cycle

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

Service indicator processing may be incorporated into one of your existing life cycles or done in a separate life cycle from the rest of the business process depending on the circumstances. Here we will walk through the example life cycle available in Studio. You can copy all or portions of this life cycle and modify to fit your need.

In our example life cycle, X - SI01 - Service Indicator Example (SIE), the placement and release are initiated by an ad hoc task. This allows the user completing the tasks an opportunity to supply values (ex, the service indicator type, comments to add to the service indicator) for processing. If the values can all be set without user interaction, the processing can be initiated by system or time work.

In Studio, check the “Documentation” tab for more details about each rule, action, task, etc.

The following steps must be configured:

1. Clear property values (so that each item processed has its own values and none carry over between documents).
2. Set static property values that do not require user input.
   - A property value **must** be set to the Operator ID for the current user.

   ![Set Property Value](image)

   - The example for adding a SI also sets a start date to the current date and an end date 120 days from now. These steps are optional, but note that certain values are required for setting/releasing a SI (a value will need to be provided for either the Start Date or Start Term).
3. Create the processing form.
   - Create a "Create Form" action and choose the **S - UIS - Service Indicator Place/Release** form.
   - Inherit Keywords from the originating document to the form where applicable. At minimum, this should include the Student ID and Campus Code.
Select the option to “Fill Document Handle Keyword(s)”

Map the Operator ID property set in step 2 to the OperID keyword on the form.

For adding a service indicator, set the Service Indicator Action form keyword value to a constant value of “N”. For removing a service indicator, set this constant value to “Y”.

- Only one service indicator can be removed per request. If more than one service indicator exists on the student’s account with the specified code/reason, an error will be returned that the removal must be done manually.

Map any other keyword/property values that are set on the document to the applicable form field.

OPTIONAL: If using an ad hoc task to initiate processing, check the “Display for input” box if the user should be given an opportunity to add values to the form directly.

- Any fields with values pre-set by rules/actions will remain read-only on the form.
4. Check for response.
   - It is recommended this is done using a timer to allow the web service time to process (this should take less than a minute). The processing form is only kept for 10 minutes.
   - A successful placement/release will result in the response of “SUCCS”.
   - The response is stored as a keyword value on the form, so you’ll need to check the value from the related document.
   - In the example life cycle, non-successful responses are copied to a property to be added to a note to determine what needs to be done for re-processing.
• If you are adding or removing more than one SI, we recommend you also use the GEN - ICS - Check for SI script to verify whether each specific SI was successfully added or removed prior to continuing with your processing. Please note this script uses mview data on a 10 minute delay.

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**Processing Life Cycle**

The web service processing is completed by the X - SI - Service Indicator Integration (SI) life cycle. This life cycle can only be modified by UIS. Contact UIS_DM_Support@cu.edu if you need assistance or if modification may be necessary.

When forms are created in the S - UIS - Service Indicator Integration Form document type, they are added to this life cycle for processing.

1. Forms will be routed to either the Processing - Add SI queue or Processing - Remove SI queue depending on which action is being performed.

2. At that point, values are replaced if needed.
   - The Operator ID used for processing will be set to PRDSVSY if the form was created by an OnBase service account.
   - If the Campus Code value is CUAMC, it will be replaced with CUDEN.

3. For SI Removals only, a script (GEN - ICS - Get SI Release Properties) will be run to get the active date/time for the specified service indicator (set to property SISetDate). If this fails, the Web Service Response keyword value will be set to “ERROR: COULD NOT OBTAIN SI SET DATE” and processing will end.

4. A rule will check that all required values have been supplied. If any required values are missing, the Web Service Response keyword value will be set to “ERROR: KEYWORD/PROPERTY VALUES MISSING” and processing will end.
   - Add:
     - Student ID
     - SI Code
     - SI Reason
     - Campus Code
     - Start Date or Start Term
     - Operator ID
   - Remove:
     - Student ID
     - SI Code
     - SI Reason
     - Campus Code
5. Once all values are set and validated, the web service will be run according to which environment is in use.

6. The response will appear on the processing form and be saved as a keyword on the processing form so that it can be checked in a related item rule from the primary document.

7. Every 10 minutes, a timer checks for items that have been in the queue longer than 10 minutes and purges those processing forms.

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**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.

Feel free to create your own Item Generators to suit your needs with your own document types, life cycles, queues and values.