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OnBase Guide - Workflow - Setting up Inbox Filters

Goal: To configure filters on the Workflow inbox in the client to allow easier review, sorting, filtering and grouping of items in the inbox

Complexity Level: Departmental Administrative Users, Departmental Workflow Developers

6/5/2020

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Background

The default Workflow inbox view lists the document name and entry date (when the document entered the queue). If a filter has been configured, users can use the filter to change this display to show columns for each of the keyword types assigned to the filter. These values can then be used to filter, group or sort the inbox according to those values.

Workflow filters are configured using Custom Queries. Please keep in mind that custom queries cannot be deleted.

New configuration should be created and tested in non-production and [migrated](#) after testing.

Prerequisites

You will need to use OnBase Configuration and 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 for Configuration and Studio.

The Workflow and System Administration MRGs also provide further details. Contact UIS_DM_Support@cu.edu for assistance if needed.

Steps to Complete in Configuration

Begin by creating a Custom Query in configuration (Queries > Custom Queries). Follow the naming conventions for your department and please include “WF” as part of the name to easily identify the custom query as workflow filter in the list.

Assigning User Groups

Only “Workflow” user groups should be used for Custom Queries used as Workflow filters. Be sure to also add the MANAGER user group. Refer to the [Expectations and Tips for Certified Admins](#) for more information on user group types and usage.

Custom Query Options



Custom Query Options - S - UIS - WF - Inbox Filter Example

Instructions

Custom Query Type

- ☒ By Document Type
 - ☐ Sort by Document Type
 - ☐ Restrict by Rights
- ☐ By Document Type Group
- ☐ By Folder Type
 - ☐ Sort by Folder Type
 - ☐ Restrict by Rights
- ☐ By Keyword
- ☐ Custom Written SQL Edit SQL
- ☐ Full Text

Advanced Options

- ☐ Exclude Duplicate Documents

Usage

- ☒ Workflow Filter Assign
- ☐ Folder Filter
- ☐ Mobile Device Accessible

Optional Controls

- ☐ Keyword Edit Fields
 - ☐ Keyword Select List
 - ☐ Value Operators
 - ☐ Binary Operators
- ☐ Text Search Button
- ☐ Use HTML Form

...
- ☐ Use OR for duplicates

Retrieval Options

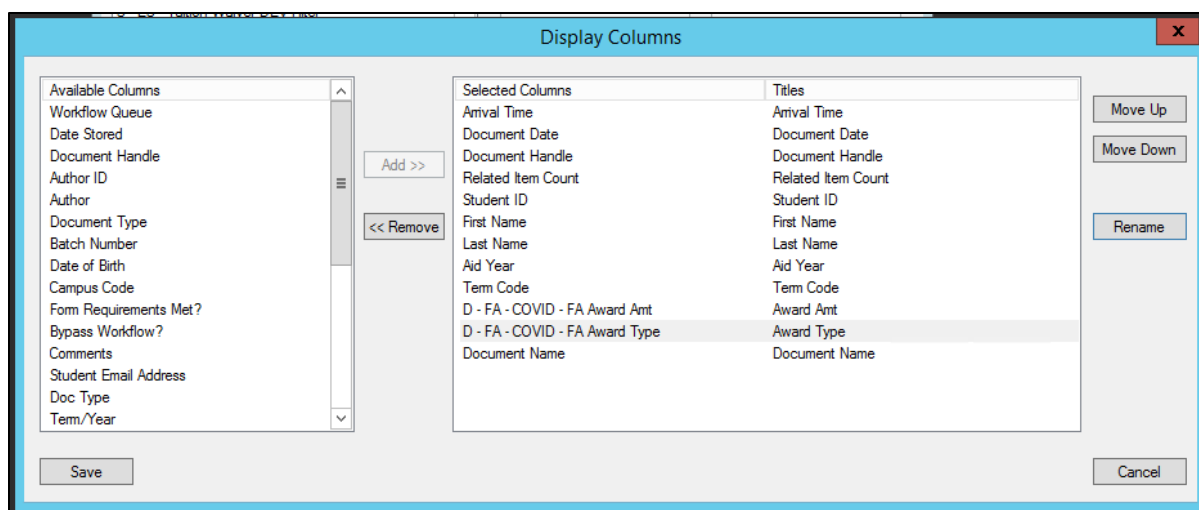
- ☒ View Documents
- ☐ View Selection List
- ☐ Return Reference

Date Search Options

- ☒ No Date
- ☐ Single Date
- ☐ Date Range

Save Cancel

- Since this will be a workflow filter, it is not necessary to enter instructions (they won't be visible to users).
- Keep the default setting of "By Document Type."
- Mark the checkbox for "Workflow Filter" under usage.
 - At this point, if the queues have been created, you can click the Assign button to assign the filter to the desired workflow queues. A good naming convention on queues will be very beneficial at this step.
- From the Custom Query menu, click Document Type Query and select the relevant document types. The same filter can be used for multiple document types/life cycles for shared keyword types.
- You do not need to configure Retrieval Keywords or an icon as these won't be presented to users.
- In Display Columns, choose the keywords and properties you want to display in the Workflow Inbox. Here you can arrange the order and display names that will appear to users.



- Once the display columns are configured, you can set a default sort order and grouping (this is optional).

At this point, users with access to the Custom Query and queues the filter was assigned to will be able to see and use the filter (after the app server cache has been reset). However, there are some settings in Studio that will provide a better experience to users.

Steps to Complete in Studio (Optional)

Connect to the repository in Studio after the app server cache has been reset.

To assign the filter to life cycle queues, check out the life cycle(s). Any filter settings you choose will need to be configured on each applicable queue. Select the queue and go to the Filters tab.

Use only selected filters

By default, users can apply any filters they have access to on any queues they have access to. This can lead to confusing results (for example, if a user applies a filter to a queue that does not contain any documents in the document type(s) for the filter, the inbox will appear empty).

Therefore, it's recommended (potentially even if you're not using workflow filters) to enable the "Use only selected filters" option on your queues. This will limit the filters that users can apply on the queue to those that are assigned to the queue.

Modified: 6/2/2020 10:10:11 (Edit) (Print) (Close) (Help)

Coverage	Advanced	Titles	Documentation	Icon
General	User Groups	Load Balance	Filters	

☒ Use only selected filters

S - UIS - WF - Inbox Filter Example

Remove

Available Filters

B - AAH - WF - Archive Indexing Filter

Add

Default Filter

<None>

☐ Display HTML Form used by Filter

☐ Display Filtered Document Count

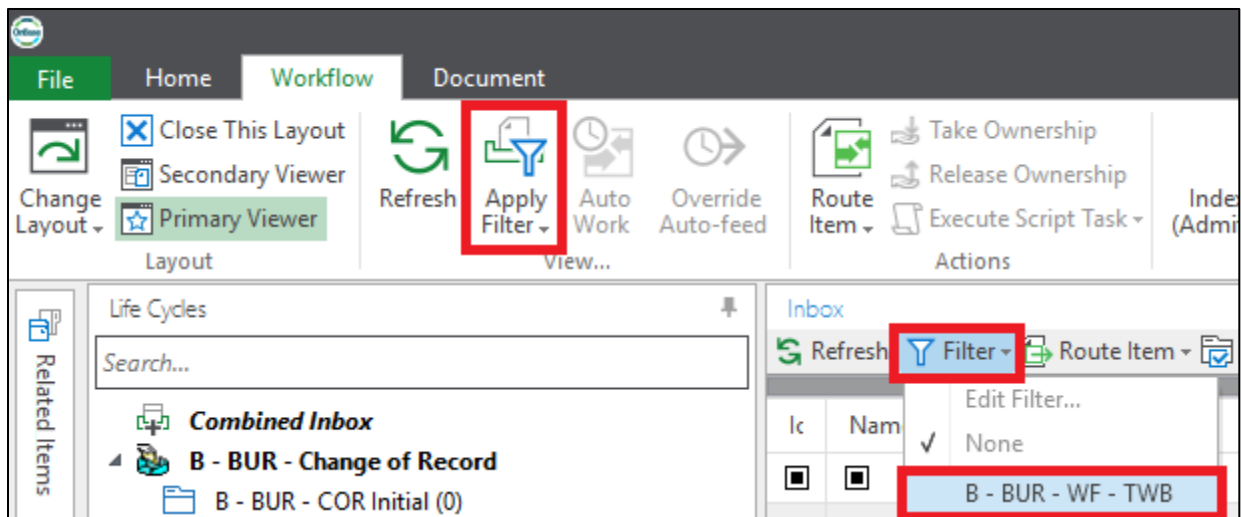
After checking the box, add any filters that are appropriate for the queue to the list. Items you assigned in Configuration will already be listed. Users will only see these in the client instead of the full list of filters.

Default Filter

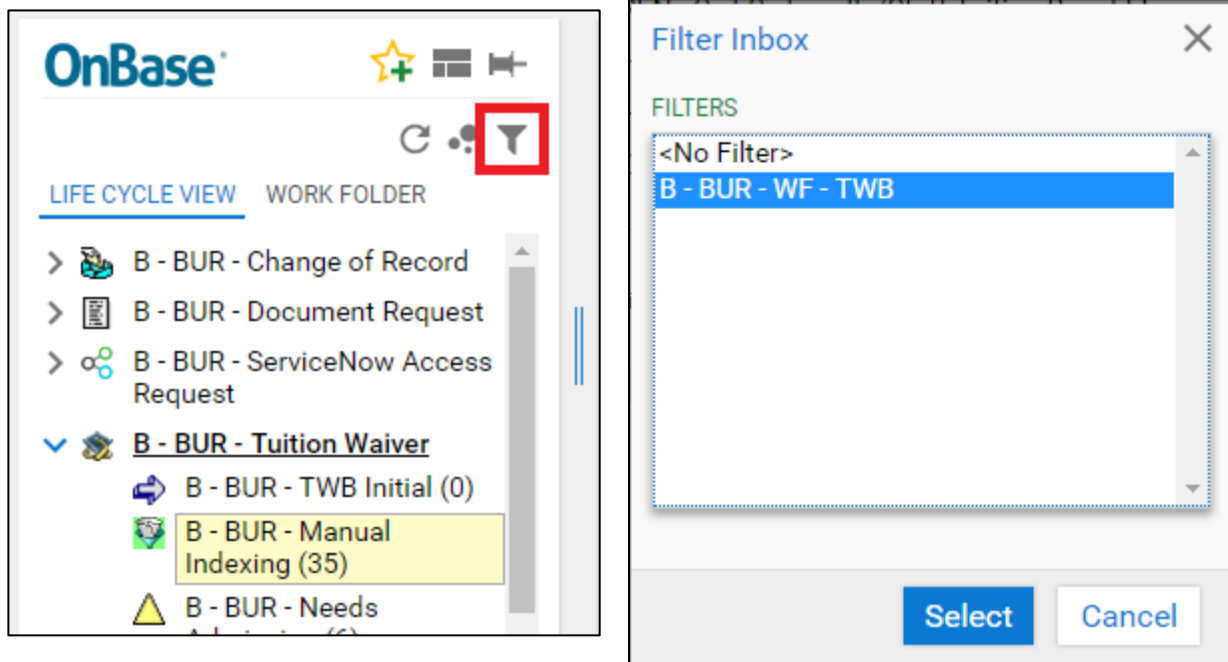
If you would like to automatically apply a filter to the queue when users access the queue, you can specify a default filter. Users can still turn the filter off, but by default the filter will show instead of the standard inbox view.

Using Inbox Filters in the Client

Click the Filter button on the Inbox menu bar or Apply Filter on the Workflow tab of the menu and choose the desired filter.



In the web client, click the Filter Inbox icon, then select the desired filter. You must be viewing a queue to see the filter icon.



The configured keywords will then display in columns. These columns can be sorted and searched.

Inbox							
Refresh Filter Route Item Tasks Execute Script Task							
ic	Employee	Employee First Na	Employee Last Na	Student ID	Student First Na	Student Last Na	Waiver Type
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 102	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				102			FACULTY DEPEND
				8102			FACULTY
				102			FACULTY DEPEND

To remove the filter and go back to the default view, either go back to the Filter button (in the main menu ribbon or in the Inbox viewer) and choose None or click the “X” with the filter name below the list.

The screenshot shows the 'Document' ribbon with the 'Apply Filter' button highlighted. Below it, the 'Inbox' viewer shows a table with columns: ic, Emp, Employee Last Na, Student ID, Student First Na, Student Last Na, Waiver Type, Term, and E. The 'Filter' button is highlighted, and a dropdown menu is open showing 'Edit Filter...' and 'None'. The table data includes rows for MICHAEL, SETH, and SUSAN, all with Student ID 102 and Waiver Type FACULTY DEPEND. The filter 'B - BUR - WF - TWB' is applied to the Student ID column.

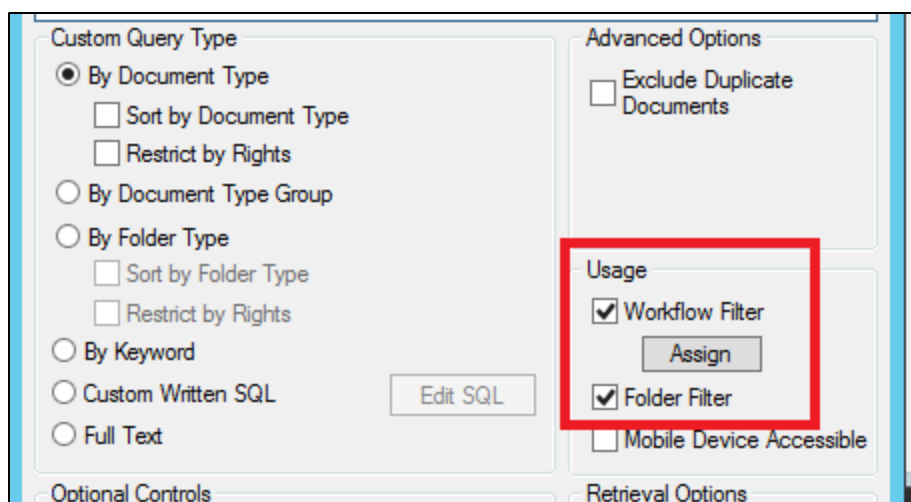
In the web client, click the Filter Inbox icon, select <No Filter> and click Select.

Users can also customize the order of columns in the client to suit their preferences.

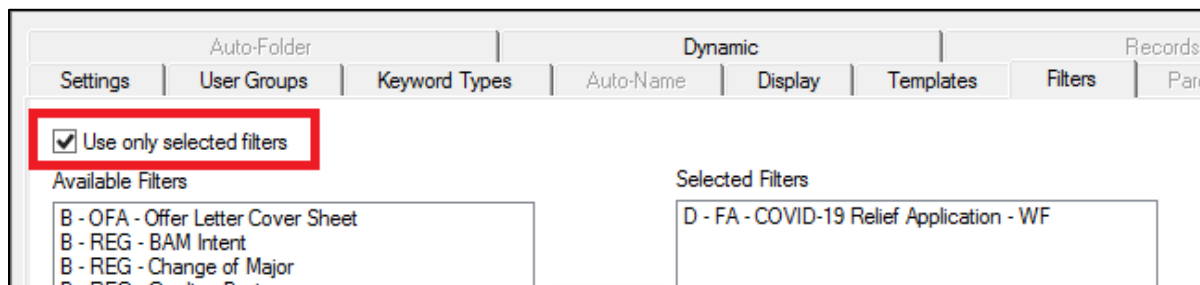
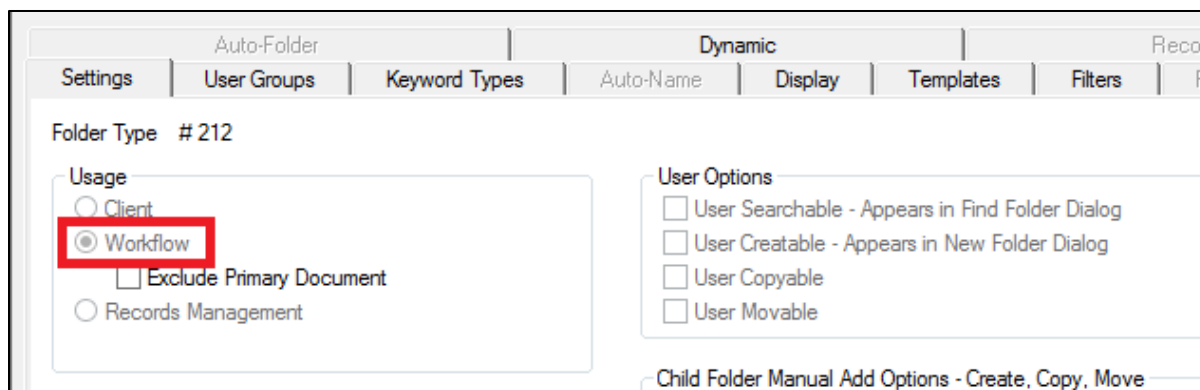
Using Workflow Filters on Related Items

In order to use a workflow inbox filter on the Related Items panel in the Workflow layout, the related items must be displayed based on a Work Folder (legacy life cycles) or a portfolio type that uses a portfolio relation based on a folder (for Unity life cycles). For more information on configuring Folders, refer to the Folders MRG.

When configuring the custom query, also select the Folder Filter option under Usage.



Then, when configuring the folder for related items, choose the “use only selected filters” option on the Filters tab and add the appropriate filters (custom queries). The folder type will need to be set to Workflow.



In Studio, create a portfolio relation using the folder. For more information on configuring portfolio relations and portfolio types, refer to the Workflow MRG.

Portfolio Relation Wizard

How do you want to find related documents?

☐ Document Handle

☐ Document Type

☒ Folder Type

☐ Child Work Items

Keyword Mappings

D - FA - COVID Relief Applicaiton Workflow Folder

Add the portfolio relation to a portfolio type. Then assign the portfolio type to the queue(s) on the Advanced tab.

D - FA - COVID Application - Awarded Holding ID: 3154

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General	User Groups	Load Balance	Filters
Coverage	Advanced	Titles	Documentation

Portfolio Type

D - FA - COVID Applications

Default Template

Users can then enable the filter on the Related Items panel in the client in the same way as for the inbox.