Goal: To configure WorkView Applications within the CU OnBase environment

Complexity Level: Departmental WorkView Administrators

11/12/2019
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Background
WorkView is a module that enables rapid development of applications suited for case management. These applications are based on relational database tables allowing for one-to-many or many-to-many relationships between objects where applicable. Since this is within the OnBase database, this also allows for integration with Unity forms and Workflow, and documents. WorkView applications are accessed through the Unity and web clients users are already familiar with.

CU has 10 concurrent licenses, meaning 10 users can be using developed WorkView applications at any time. Developers configuring in Studio do not count toward this limit.

Prerequisites
OnBase Studio must be installed to configure WorkView (and any related Workflow processes). OnBase Configuration is needed to create user groups (and any document types or keyword types related to your application).

Refer to the OnBase Client Guides for installation instructions.

Required Trainings
Prior to receiving access to configure WorkView, the following trainings must be completed:

- Work View | Case Manager Hands On Lab
- Work View | Case Manager: Building Your First Solution
- Work View | Case Manager: Intermediate
- Work View | Case Manager: Advanced
- Work View | Case Manager: Troubleshooting

Hyland also offers a WorkView Certification and hands-on sessions during the first two training days at CommunityLive. These are not required but are recommended due to the complexity and potential impact of WorkView configuration.

Resources
For more information, refer to:

- the WorkView MRG
- the Application Builder Community
- the WorkView | Case Manager Community

If you need assistance from UIS, please contact UIS_DM_SUPPORT@cu.edu.
User Groups & Access

Two functional groups exist to support WorkView usage:

- **Functional - WorkView User**: Required to access WorkView applications the user has been granted access to through “WorkView” user groups. Add any users who will be using your applications to this group.

- **Functional - Developer - WorkView**: Required to configure WorkView in Studio (see Required Trainings)

No WorkView configuration (applications, classes, etc.) should be assigned to these functional groups; they exist only to provide access to WorkView functionality.

All other configuration should be assigned to “WorkView” user groups as outlined in Expectations and Tips for Certified Admins. No functional permissions should be assigned to these groups in Configuration, just create the group and add members. Then, assign only WorkView configuration (applications, classes, views, filter bars, etc.) in Studio.

Please add MANAGER to all WorkView configuration items.

Do not enable the “Always On” option for the MANAGER group. This option can be selected for your other “WorkView” groups as needed.

You can review a group’s access to an application by right clicking the application and choosing “Master Security”. There you can copy access between groups, eliminate all access for a group, or grant access to an entire application to a group.

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WorkView Configuration Guidelines

All WorkView configuration must conform with the [OnBase Naming Conventions](#). Some items cannot include spaces or non-letter characters in their names so the naming convention is modified accordingly.

All configuration must be developed in the DMOTST environment and thoroughly tested prior to migration to DMOPRD.

WorkView requires careful consideration of the requirements and desired outcome before configuration.

**Classes**

1. It can be difficult to remove relationships between classes once they are established. Carefully plan which classes will be needed, how they might relate to each other, and what type of relationship(s) would exist (one to one, one to many, many to many) in order to configure the correct type of classes and relationships between them.

2. **Do not** configure Shared classes between applications.
• Changes made to a shared class in one application also changes the class in all other applications using the class.
• Shared classes also cause all other applications using the class to be included in any export files upon migration.
• Password protection on an application affects other applications using the shared class.

3. To use existing employee and/or student data (from AutoFill Keyword Sets), configure External Classes as follows:
• Create a new class and choose External Class.
• Enter the class name.
• Choose Local or Linked Server.
• Set Server as local and the Database as the environment name (DMOPRD, DMOSTG, DMOTST or DMODEV).
  i. For student information, enter HSI.KEYSETDATA112 as the table name.
  ii. For employee information, enter HSI.KEYSETDATA117 as the table name.
• Assign the appropriate user groups (including MANAGER).
• For student information, configure attributes as follows. You can exclude any attributes you do not need but must include KEYSETNUM and Student ID.

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<tr>
<th>Name</th>
<th>Display Name</th>
<th>Data Type</th>
<th>Index</th>
<th>External Data Column</th>
</tr>
</thead>
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<td>Unique</td>
<td>KEYSETNUM</td>
</tr>
<tr>
<td>StudentID</td>
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<td>KS113</td>
<td></td>
</tr>
<tr>
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<td>Alphanumeric (50)</td>
<td>KS105</td>
<td></td>
</tr>
<tr>
<td>MiddleName</td>
<td>Middle Name</td>
<td>Alphanumeric (50)</td>
<td>KS206</td>
<td></td>
</tr>
<tr>
<td>LastName</td>
<td>Last Name</td>
<td>Alphanumeric (50)</td>
<td>KS104</td>
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</tr>
<tr>
<td>DateofBirth</td>
<td>Date of Birth</td>
<td>Date</td>
<td>KS106</td>
<td></td>
</tr>
</tbody>
</table>
• For employee information, configure attributes as follows. You can exclude any attributes you do not need but must include KEYSETNUM and Employee ID.

<table>
<thead>
<tr>
<th>Name</th>
<th>Display Name</th>
<th>Data Type</th>
<th>Index</th>
<th>External Data Column</th>
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<tbody>
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</table>

4. Extension Classes
• For sibling classes to share attributes, the attributes must be on the base class.
• For objects that will be converted to another class (ex. Base class = Person with extension classes of Applicant and Employee, and objects converted from Applicant to Employee), create relationships on the base class.

5. Association classes allow for many to many relationships.
• Create the association class to relate to classes. Ex. CustomerXCase
• Create a filter for each class related to the association class.
• Embed each filter on a view for the opposite class. For example, put the customer filter on the case view and the case filter on the customer view.
• Advanced associations allow for attributes to be added, otherwise no attributes can be added to a standard association class.

6. Disable direct object creation on classes where applicable (where users should never be able to create objects or where users should only create objects from within an embedded filter or through another defined process).

7. WorkView folders are easier to configure than File Cabinet Folders, but do not have a hierarchical structure. Either type of folder can be added to a view once it is configured, in order to show documents related to the object.

8. Limited actions are available directly within WorkView Actions.
• For more advanced functionality, add objects to workflow to use the full set of rules and actions available there.
• If an action is configured as a button on a view, it will no longer appear in the Tasks menu ribbon (it will only be available in one place).
9. Create Mappings before Triggers. When configuring mapping for object creation or document import, map as many attributes as you can. When configuring mapping for searching for existing items, it’s better to use fewer attributes (since AND logic is used to identify items).

10. Use Triggers when calculating values that will need to update or be used elsewhere. Calculated attributes are only evaluated once and are not as widely available for use within the application.

**Filters and Filter Bars**

1. Ensure all filters accessible to users in the clients have criteria or required prompts to limit the result list.

2. Naming filters with a prefix (along with the standard CU naming convention) makes it easier to identify where and how each filter should be used. It can also help to add the class name and the view name if applicable.
   - UI - User interface, likely used in filter bars
   - EMB - Embedded (within a view)
   - LU - Lookup (for in a view)

3. Set a User Defined Filter Bar for the application to allow users to create their own filters.

**Views**

1. Consider which fields should be required and/or read-only for your process.

2. Making the layout narrower makes it easier to read and use, a width of 85% works well.

3. Multiple views can be configured which will appear as tabs across the screen so that users do not need to scroll as much.

4. Any embedded items will run queries to load the items within, which can delay the load time. Embedded items such as folders may be better suited to their own views to improve load time.

**Application Creation Excelerator**

This feature enables WorkView application creation based on a template created in MS Excel. This can reduce the time needed for development of applications.

Pre-defined ACE files are available on Community. A blank template can also be created from Studio.
Refer to *Application Creation Excelerator* in the WorkView MRG for more details.

**Testing**

Resetting the app server cache is not sufficient for most WorkView changes to take effect in the Unity and/or web client; an app pool recycle is needed. However, recycling the app pool disrupts any other users in the environment, so it is necessary to wait until the next day to verify changes in the client. This includes, but is not limited to:

- Class creation/modification
- Permission modification
- Filter/Filter bar creation/modification

In general, plan to wait until the next day to test changes in WorkView.

Test data can be imported from an Excel or CSV file using the WorkView menu in Studio. Refer to *Exporting and Importing Data* in the WorkView MRG for more information.

Item generator can also be used to create objects or documents used to create objects. Refer to *Configuring Item Generators* in the Studio MRG for more information.

**Migration**

Refer to the *Exporting and Importing Configurations* guide for details on migration. Note that the Data Import/Export options on the WorkView menu in Studio cannot be used for WorkView configuration migration; this only imports or exports data for objects.