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OnBase by Hyland

# OnBase Guide - WorkView for Unity Form Reporting

**Goal:** To report on non-keyword fields on Unity forms using Reporting Dashboards via WorkView

**Complexity Level:** Departmental WorkView Administrative Users

**6/3/2020**

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## Background

Reporting Dashboards can be configured to display keyword data for OnBase documents, but non-keyword (XML) Unity form fields are not available for direct reporting using this Document Query data provider method. However, using workflow to create WorkView objects with the information from the form allows for reporting on the WorkView objects to display this information.

As this is a complex process, please consider whether it is better to store the form values as keyword values in order to report on keyword values directly. In most cases it is recommended to use keyword values, but in some cases (like fields containing more than 250 characters) creating WorkView objects will be a better option.

## Pre-Requisites

You will need to have Studio installed, refer to the OnBase Studio - Installation and Setup guide if needed.

You'll also need to be comfortable with Reporting Dashboard, Workflow and WorkView configuration and have the necessary administrative user groups assigned to your account. Refer to the WorkView Configuration Guide and the Reporting Dashboards, Workflow and WorkView MRGs for more detailed information than what is included in this guide.

The Unity form will need to be configured. Make sure the fields have been given a descriptive ID so you can easily identify the desired fields. Refer to the Unity Form MRG for more information if needed.

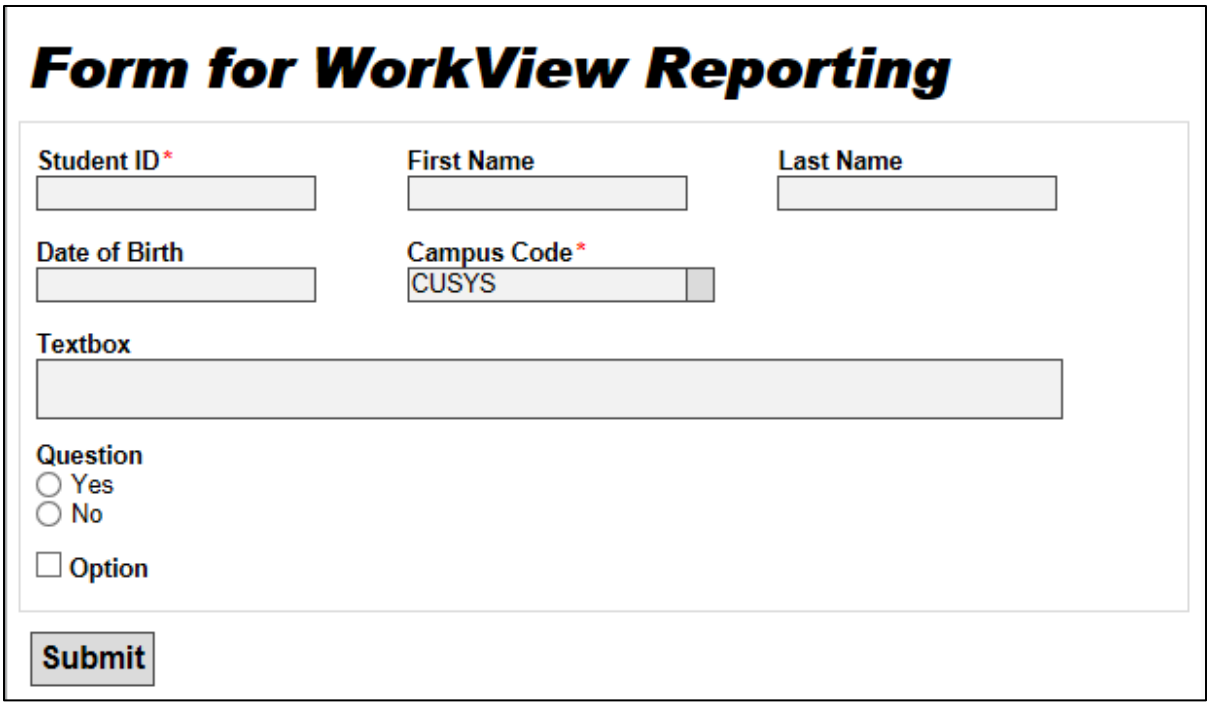
Once the form is configured and your reporting needs are defined, the WorkView application can be planned and configured. Then the workflow can be configured to support the process of creating objects. Finally, you can configure Module Associations and the dashboard.

Contact UIS_DM_Support@cu.edu for assistance if needed.

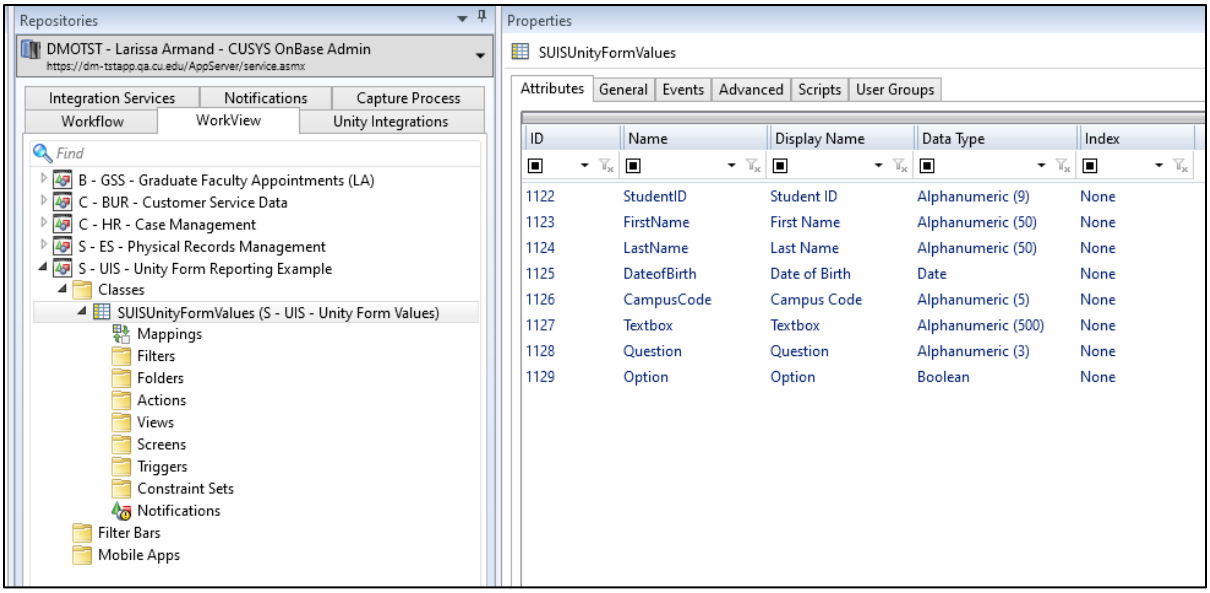
## Steps to Complete in WorkView (Studio)

A WorkView application will need to be created in order to store the data from the Unity forms as WorkView objects. Any data that you want included in the dashboard will need to be attributes on a class in the application. Then filters for the classes will be the basis for the Module Associations to use the objects in reporting dashboards.

For example, we want to report on the non-keyword values in the multi-line textbox, radio button and checkbox on this form template, in addition to the student keyword information.

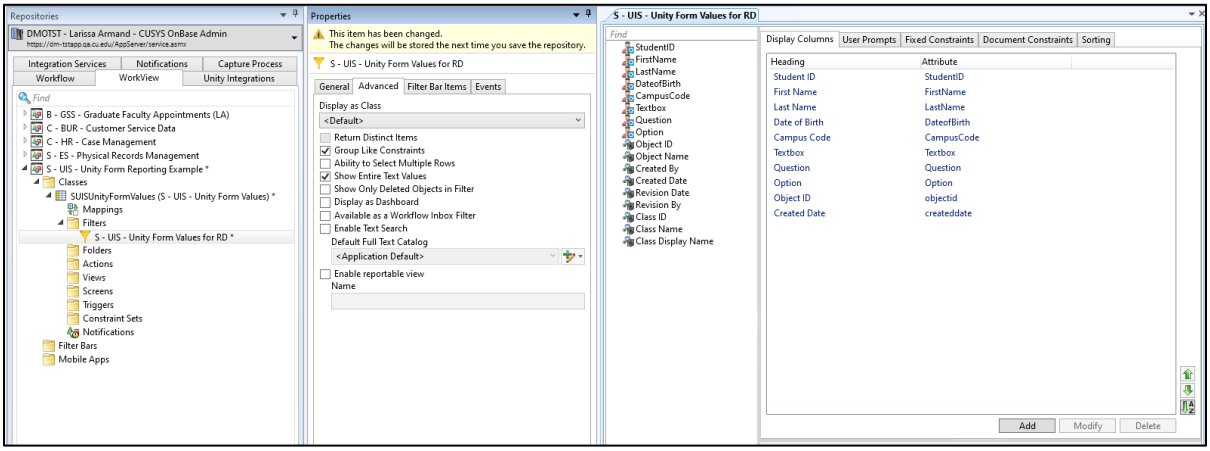



This will be done using one class in an application created for this purpose. Each form field that will be included in the dashboard has a corresponding attribute in the class.



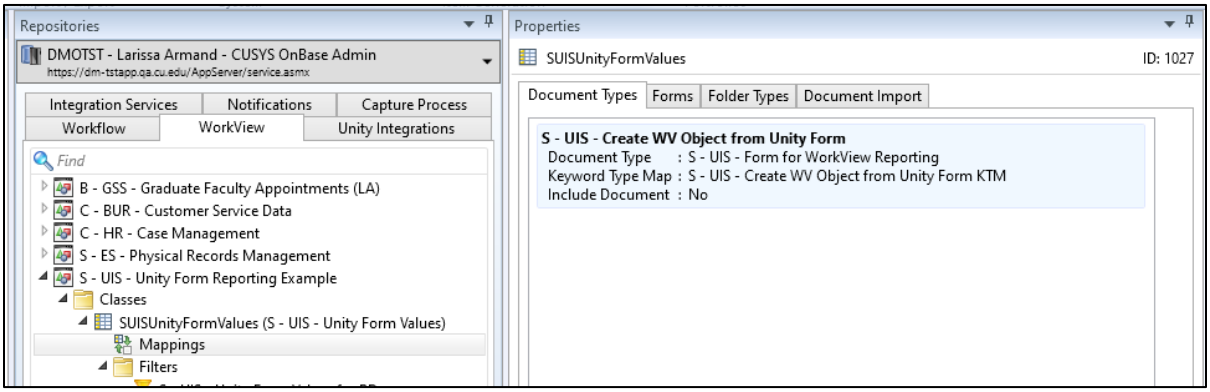

NOTE: It's recommended to disable direct creation of objects in the class(es) and set user group access accordingly if objects should only be created from Unity forms through the workflow process.

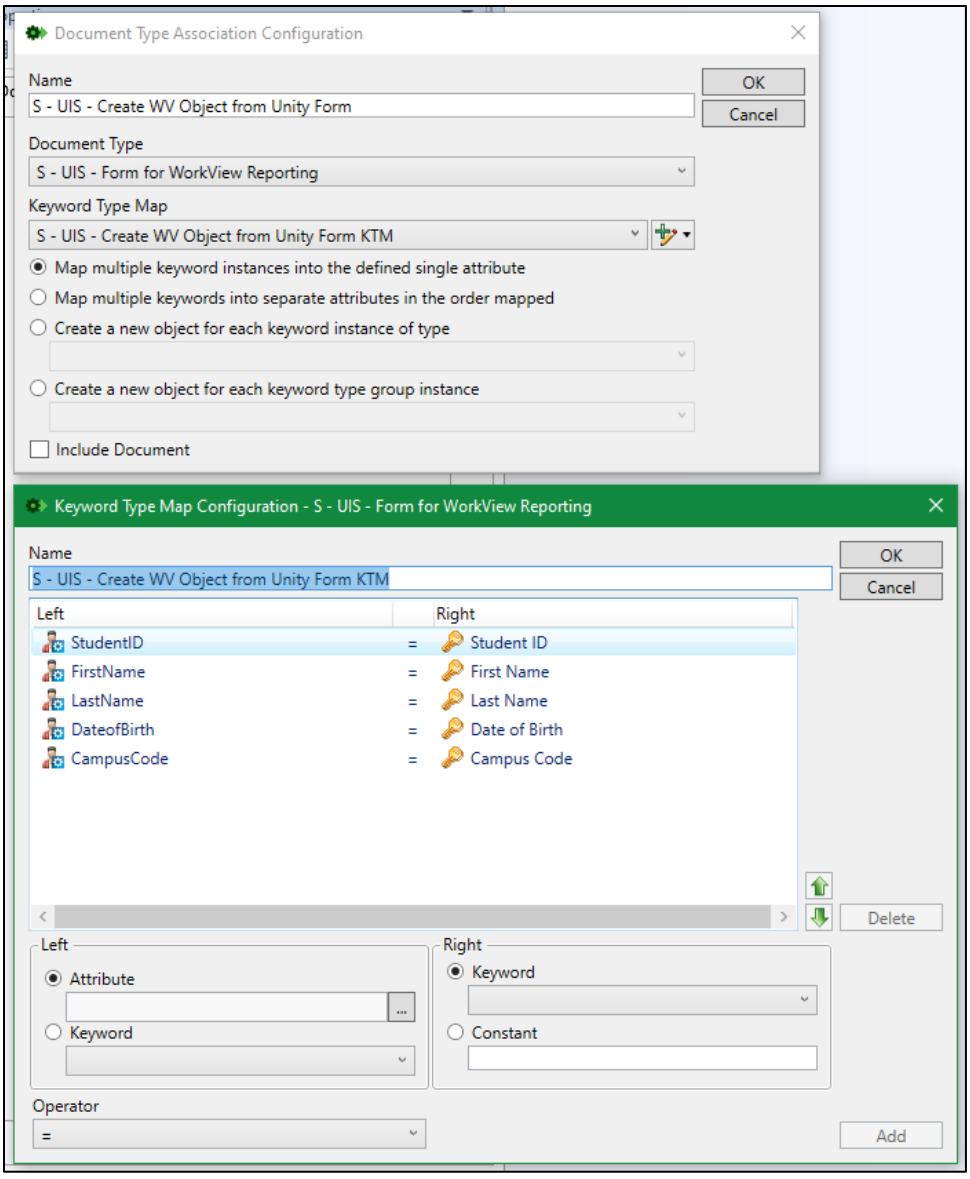
A filter also needs to be created to display all the class attributes, plus some object metadata attributes are included. All attributes that should be in the dashboard need to be included in a filter.




NOTE: In order to view all objects directly as an administrator, you'll also need to create a filter bar and assign the filter and your administrative "WorkView" user group.

Finally, a Document Type Association is needed in order to map the document keyword values to the WorkView attributes. This is used in the workflow action to create objects.





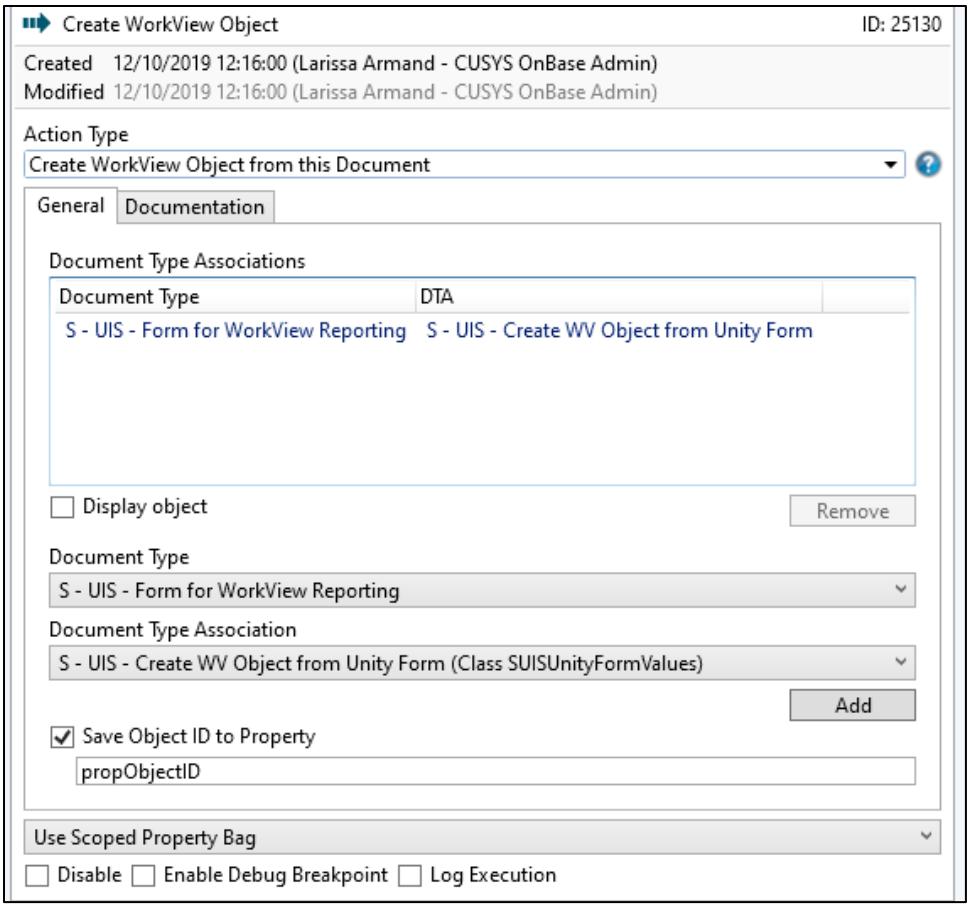

## Steps to Complete in Workflow (Studio)

For this process, the Unity forms will need to be directed to a Workflow life cycle which creates WorkView objects. The life cycle will need to be a Unity life cycle to create the relationship between the form and a WorkView object. You could:

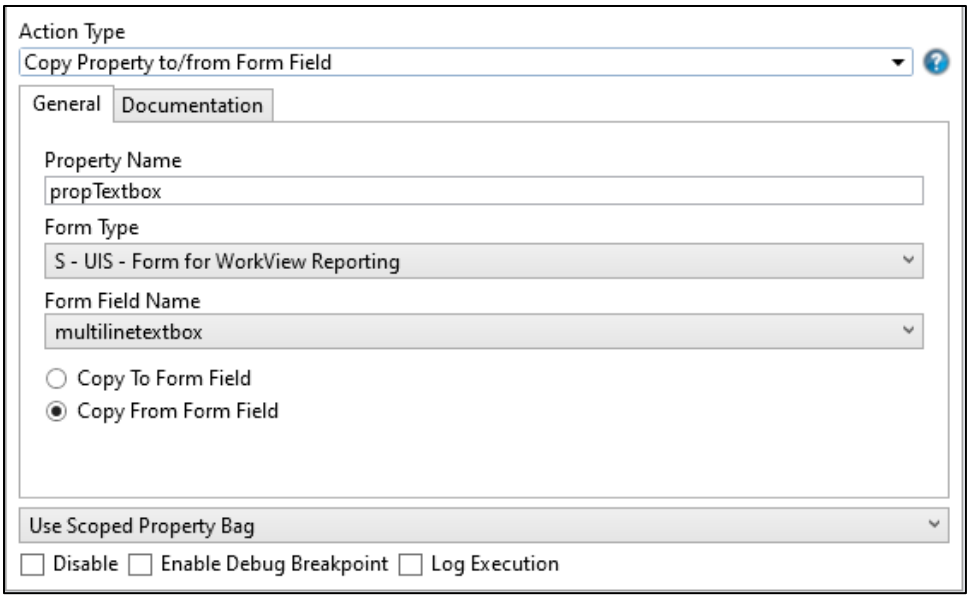
- Create a life cycle for the appropriate document type to create objects upon form submission
- Create a life cycle and direct forms there from another life cycle after they are processed
- Add a queue or actions to an existing Unity life cycle

In this example, the forms will be directed to a life cycle upon submission and the life cycle will only create WorkView objects.

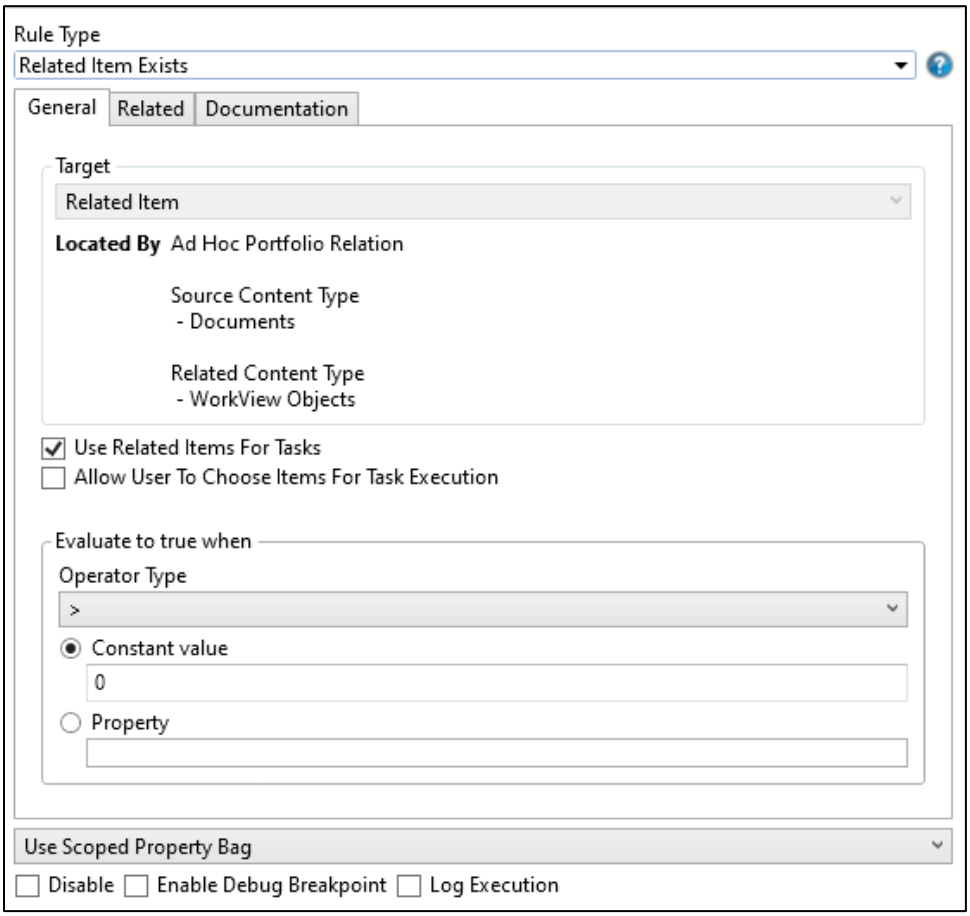
Add an action with the action type “Create WorkView Object from this Document.” Choose the document type and document type association you configured for the application. Check the box to save the object ID to a property. This will be needed to copy the non-keyword values from the document to the object.



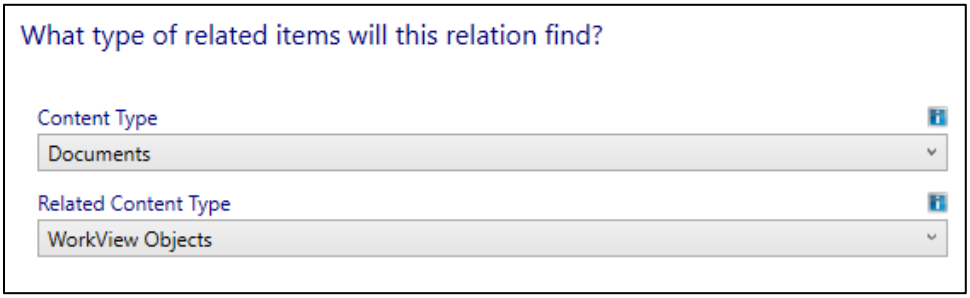

For any non-keyword values we want to include, we’ll need to copy those values from the form to a property. For example, we do the following for the textbox on the example form.



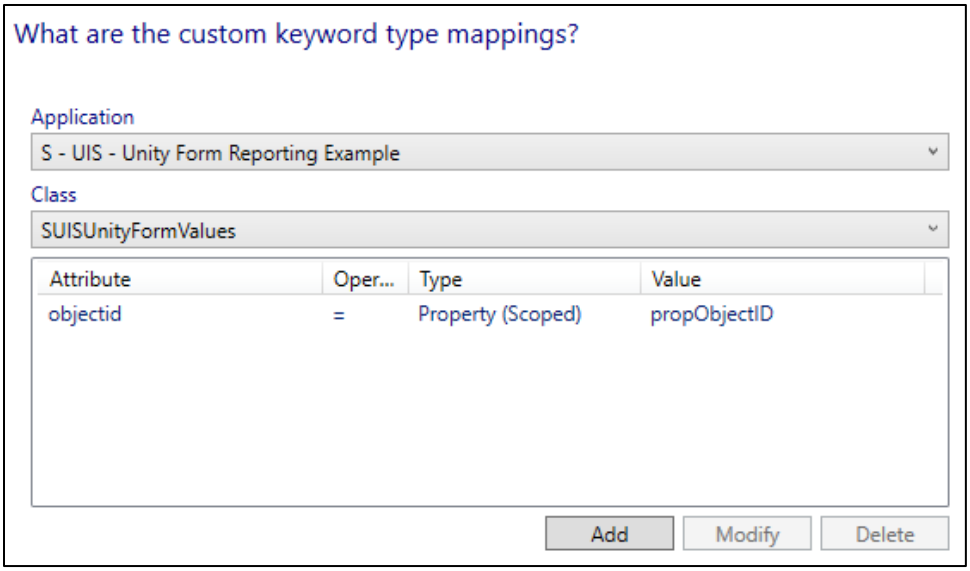

We then need to identify the related WorkView object to copy these properties to attributes on the object. We do so with a “Related Item Exists” rule.



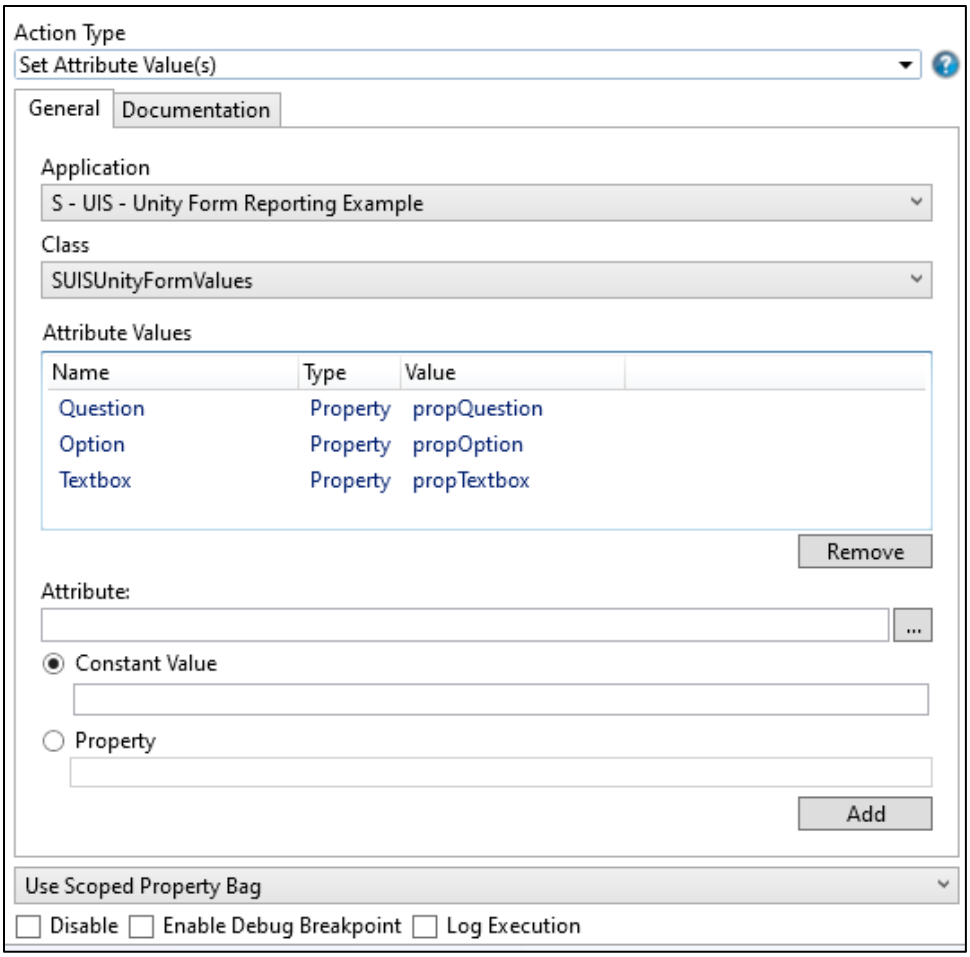

Then configure the relationship to map the object’s object ID to the object ID we stored as a property when creating the object. In this example, we’re using an ad hoc portfolio relation between the document and a WorkView object.




A custom keyword type mapping was used to map the object's object ID with the object ID stored as a property.

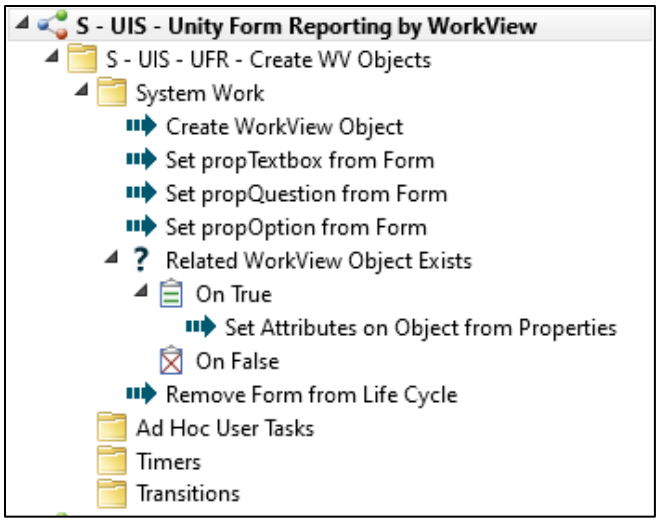



On the rule, select the checkbox to "Use Related Items for Tasks" then when create a "Set Attribute Value(s)" action for when the rule evaluates to true. This will set attribute values from the properties copied from the form.




After this step, the form is removed from our example life cycle.

Overall, the workflow looks like this:

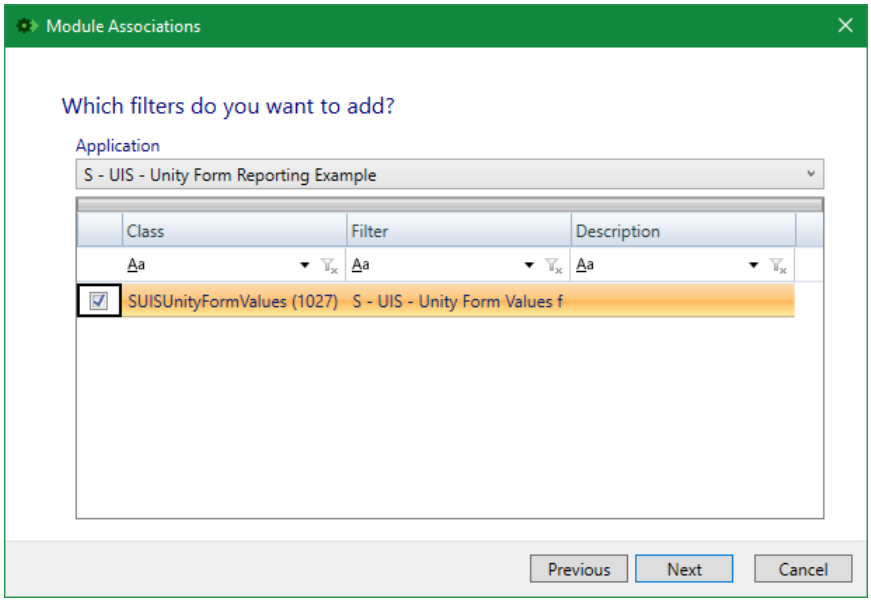



For production processing, it's recommended that initial system work be configured on a timer. This example has been simplified for clarity.

## Module Association (Studio)

Module Associations map filters from WorkView applications so that they can be accessed by data providers. Instructions for creating Module Associations are available in the WorkView MRG and in Section 2 of the Reporting Dashboards Beyond the Basics course on Premium.

On the WorkView tab in Studio, select **Module Associations** then click **Add** to create new. Choose **Reporting Dashboards**. Select the application and filter. Choose the desired user groups and finish.




## Steps to Complete in Reporting Dashboard Configuration (Unity client)

Instructions for creating a data provider from a WorkView module association and a dashboard using the data provider are available in the Reporting Dashboards MRG.

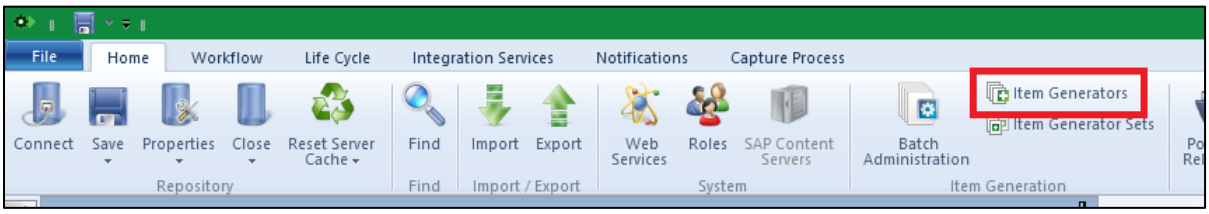
Create a new data provider, choose WorkView as the data provider type, then choose the desired Module Association. Keep in mind that the app pool will need to be recycled before the module association(s) will appear in the Unity client.

Once the data provider is configured, the rest of the dashboard configuration will be the same as if another data provider type had been used.

NOTE: Users who will access the dashboard will need to be granted access to the dashboard, data provider(s) and module association(s) involved.

## Testing the Solution

Item Generators can be configured to create Unity forms in the desired document types and with the desired keyword/field values. These let you test life cycles in a variety of ways and specify 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.

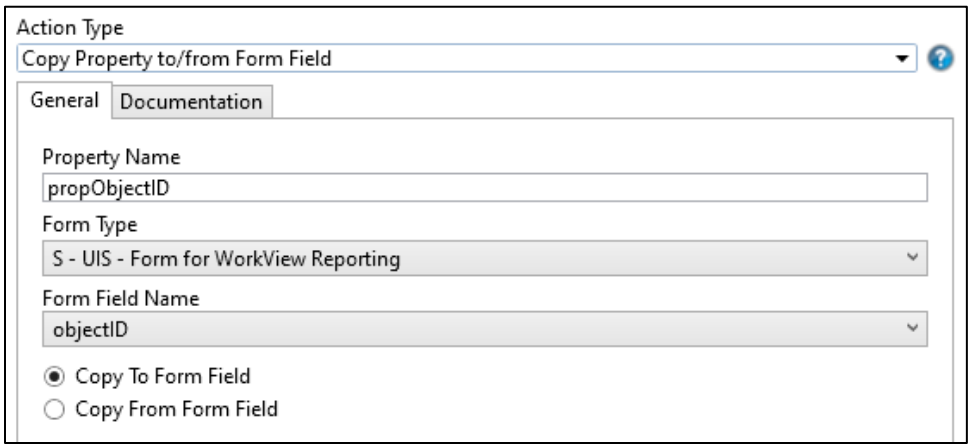
## Migration between Environments

There are special considerations for migrating projects involving WorkView, especially the reporting elements. The Exporting and Importing guide has further details.

## Deleting Objects Upon Form Deletion

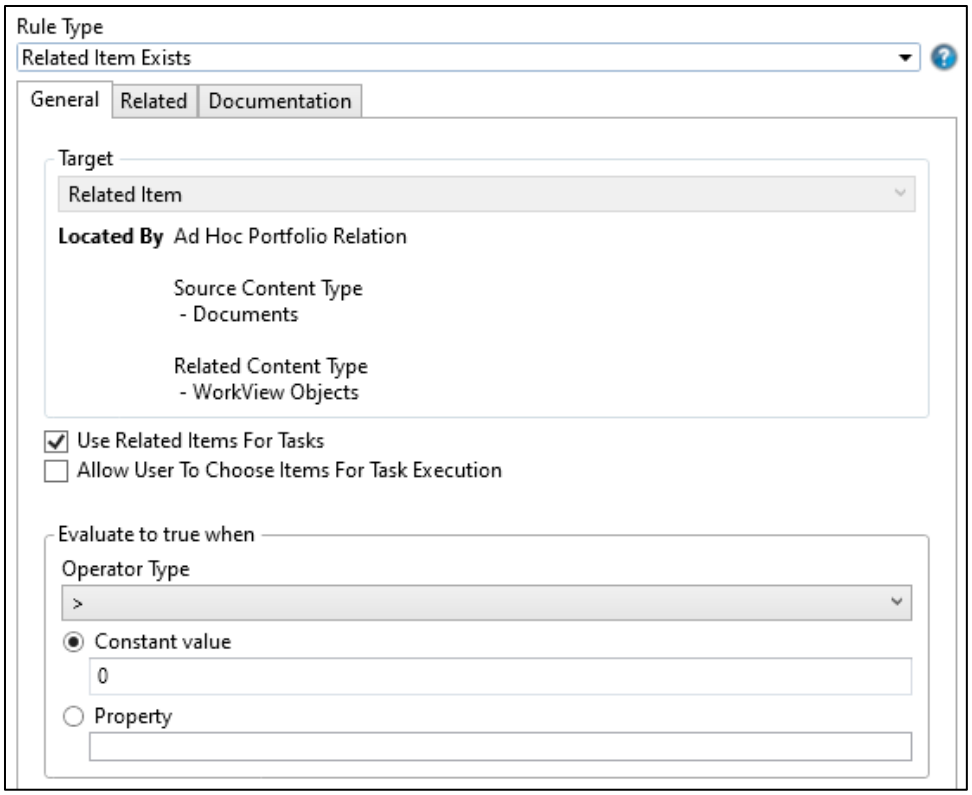
If you'd like to have objects that were created through this process deleted when the source form is deleted, add the following:

- A field on the form to hold the Object ID for the object related to the form.
- An action to copy the object ID property to that form field.

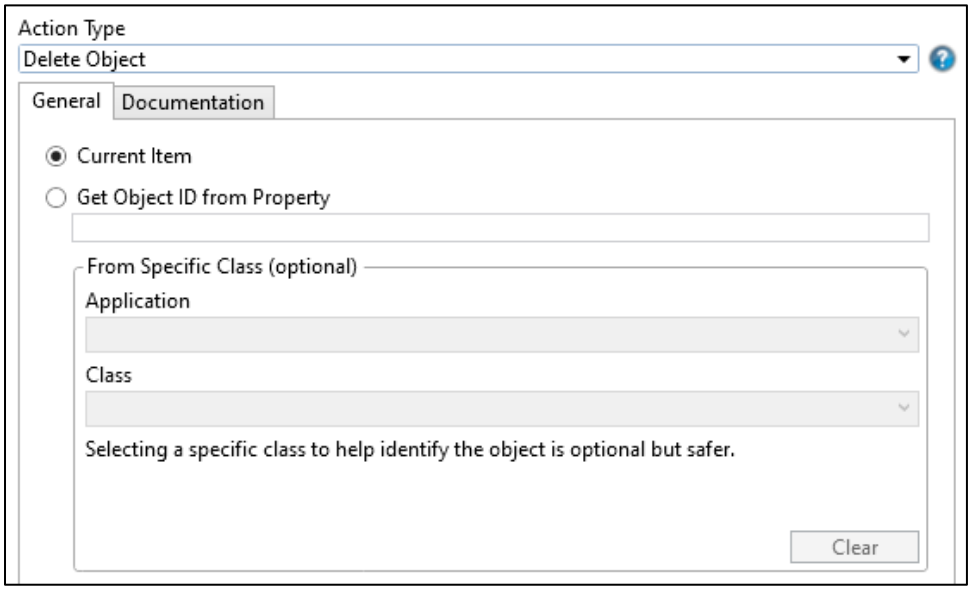



- A Unity system task that will delete the form and the related WorkView object. This will require that the system task is used to delete the form rather than the standard document delete function (document type overrides on the relevant user groups can enforce this).

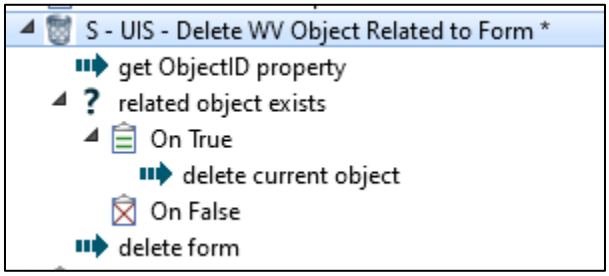
- Get the objectID property from the form.
- Identify the related WorkView object based on the property value. Use the same relationship as described above for copying property values to the object and select “Use Related Item for Tasks.”




- Delete the object.




- Delete the form.
- Overall, the system task looks like this:


S - UIS - Delete WV Object Related to Form *
get ObjectID property
related object exists
On True
delete current object
On False
delete form