OnBase Guide – Create Document Packet Template

Goal: To create a document packet template.

Complexity Level: Departmental Administrative Users

11/6/2020

Contents

Background

Document Packets allows users to generate a single PDF document from multiple source documents within OnBase. Before the document is published, documents and pages can be rearranged, duplicated, or removed from the final output, offering end users flexibility and a high level of customization.

A packet can include a dynamic header, footer, and table of contents. The resulting packet is indexed and saved in OnBase, so it can be treated like any other OnBase PDF document—shared, routed, and edited using your existing processes.

Beginning with OnBase version EP3, packets can be created without the use of a template. This functionality is available to all level 2-4 users. If your department will only be using this method of ad-hoc packet creation based on user selection of documents, no configuration is necessary. For more information on creating non-template packets, refer to the applicable portions of the Unity client/web client MRG.

Document Packet Templates allow you to further automate the packet generation process. Templates can be used to define the header and footer details and use a pre-defined set of documents which allow consistent packet creation that doesn't rely on user interaction (can be scheduled or automated using workflow).

Prerequisites & Resources

This process will require use of both OnBase Configuration and OnBase Studio clients. Refer to the OnBase Client Guides for instructions on installation.

A premium subscription training for Document Packaging is available through Hyland, please complete this brief course before proceeding.

Also refer to the Document Packets MRG for more information if needed and contact UIS_DM_Support@cu.edu for help.
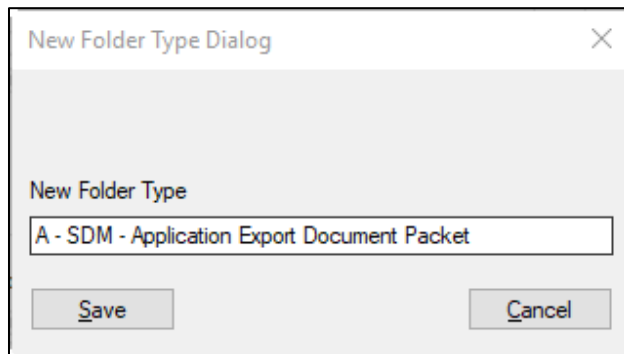
Configuring a Folder

We will work from the bottom up to configure your document packet template, starting with configuring a folder.

In Configuration, go to **Document** > **Folder Types**. In the window that appears, right-click in the empty area on the left side, and select **New** from the menu that appears.

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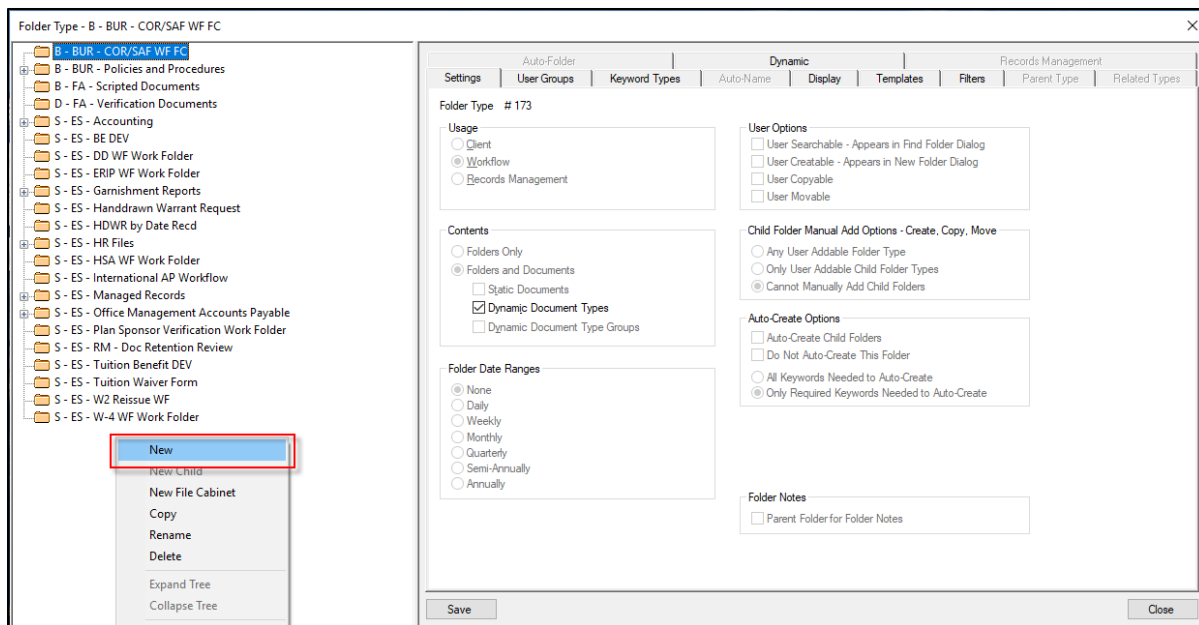
Name the folder with appropriate naming conventions. Ensure you end the name with "Document Packet." Click **Save**.


Configuring the folder is fairly straightforward. On the **Settings** tab, select **Workflow** in the **Usage** section.
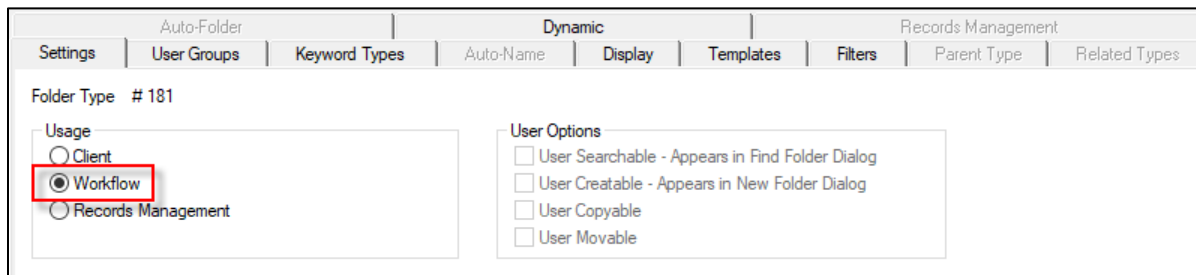
Go to the **User Groups** tab, and assign appropriate user groups to the folder. These are the groups that will be able to create the document packet. Find the desired group(s) in the Available list and move them to the Selected list using the **Add** button or by double clicking. Make sure to include the "MANAGER" group!

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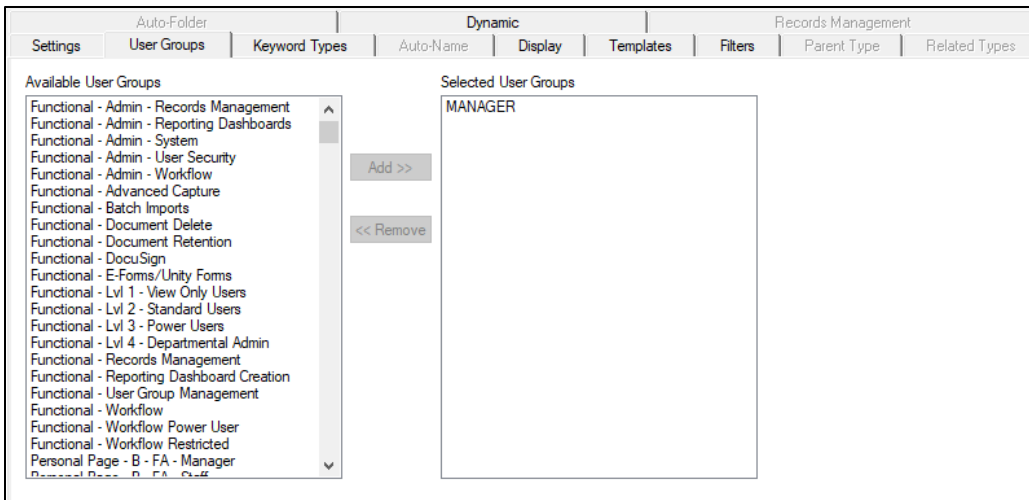
Go to the **Keyword Types** tab. Move the "Student ID" keyword (or another keyword type common to all document types that will be included in the packet; this guide will use Student ID as an example) from the Available list to the Selected list using the **Add** button or by double clicking.
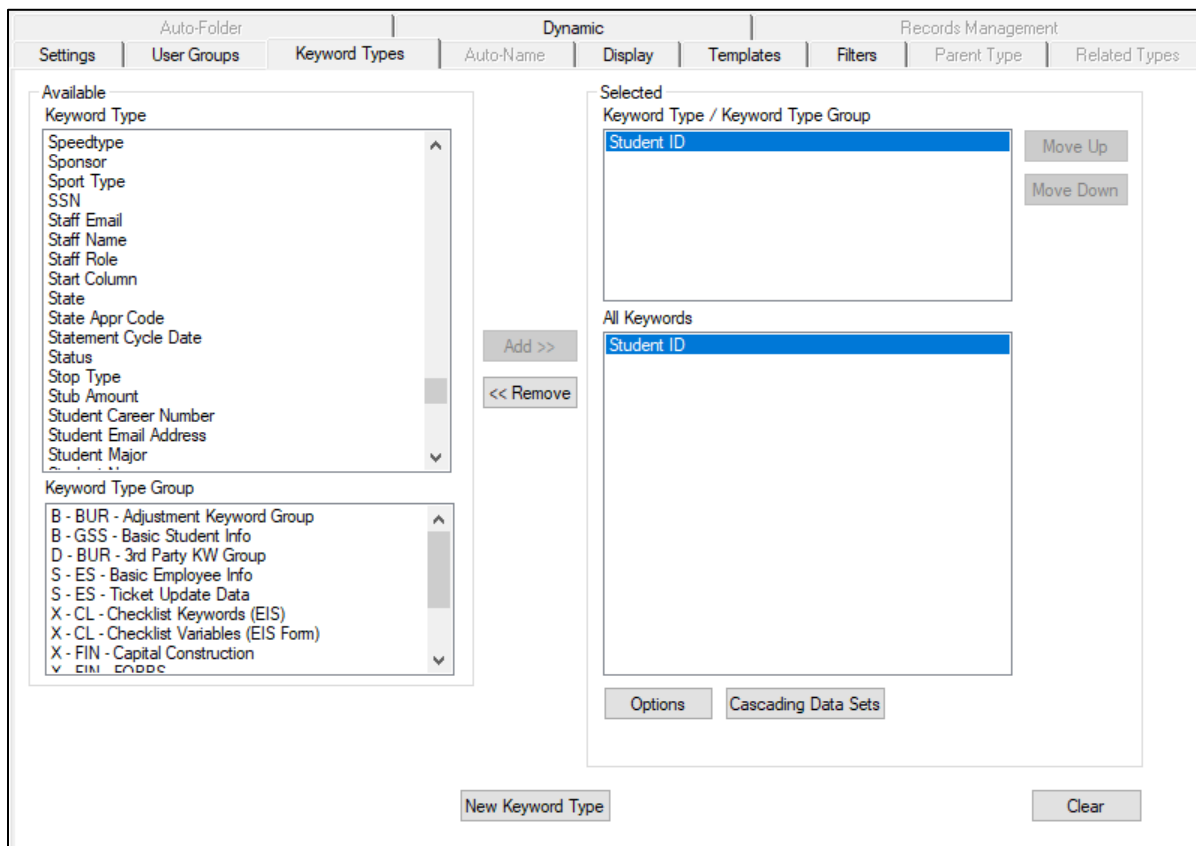

Go to the **Dynamic** tab. This is where you will select the document types you want to include in the document packet template by default when you create a new document packet.

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Find the desired document types in the Available list and move them to the Selected list using the **Add** button or by double clicking. Once you select each document type, the Keywords window will appear. Select "Student ID" on the left and click **Add**. Then click **Save**.
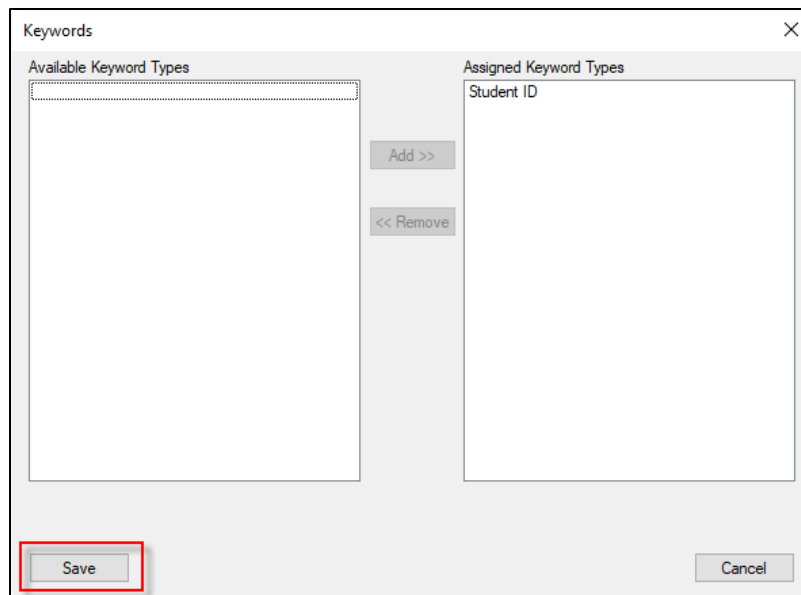
Repeat the process for each document type you want to add to the template.
To reorder the document types, select the document type you want to change, and click the **Up** or **Down** button.

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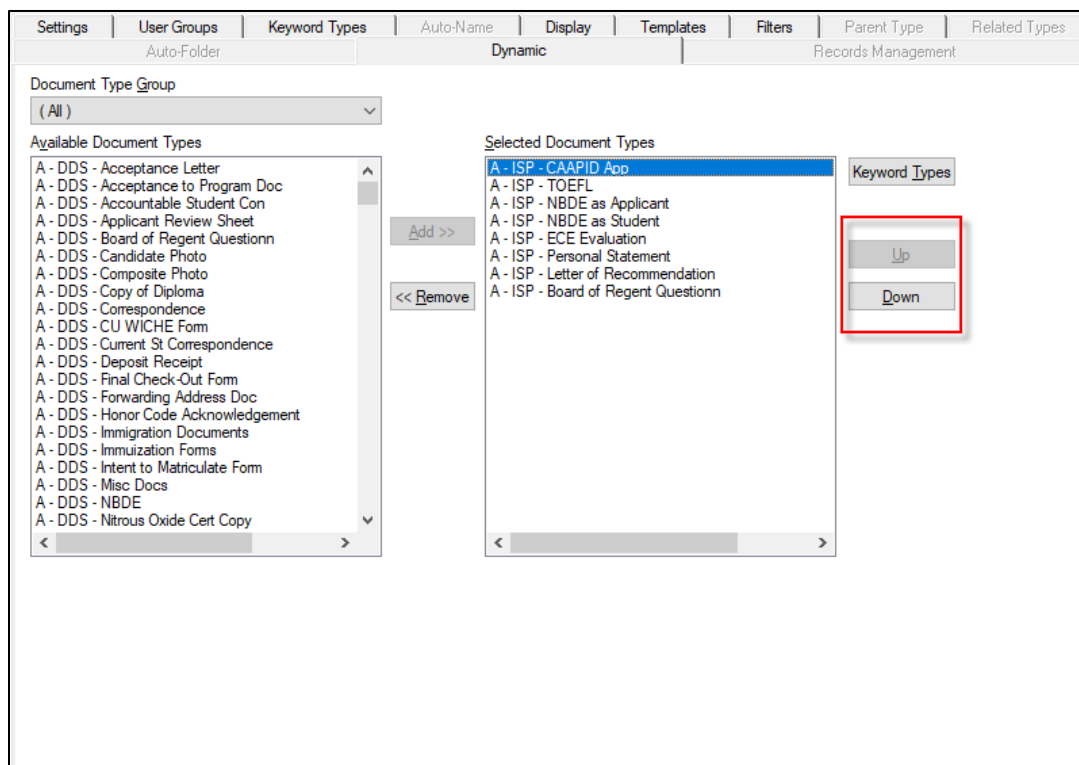
Click **Save**, and close the folder configuration window.

Configuring a Portfolio Relation

We now need to associate the folder we created with a Portfolio Relation. This is done in Studio. Open Studio and connect to the same environment that you built the folder in.

In the top ribbon, on the far right, click the **Portfolio Relations** button in the Portfolios section of the Home tab of the menu.
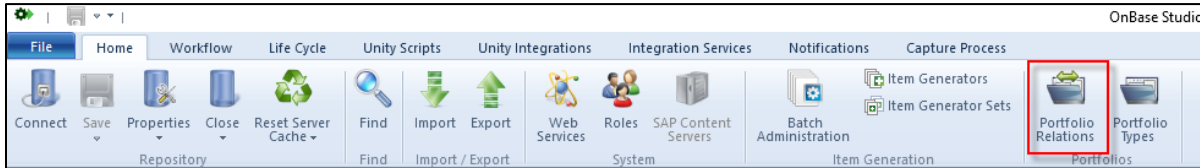

Click the **Add** button on the new screen that appears.
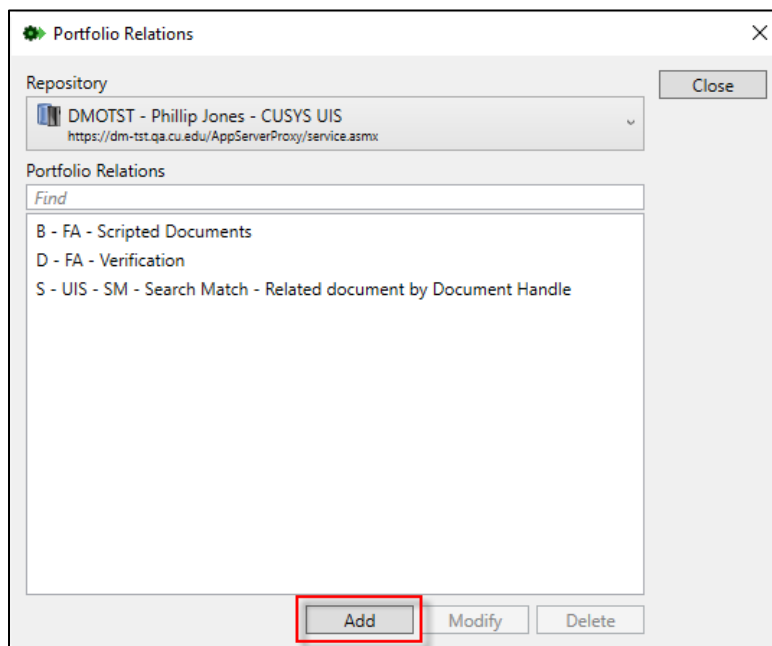
Name the portfolio relation the same as you named the folder. This will keep it clear what this relation is connected to and what is connected to it. Leave the **Content Type** and **Related Content Type** fields set to "Documents" and click **Next**.

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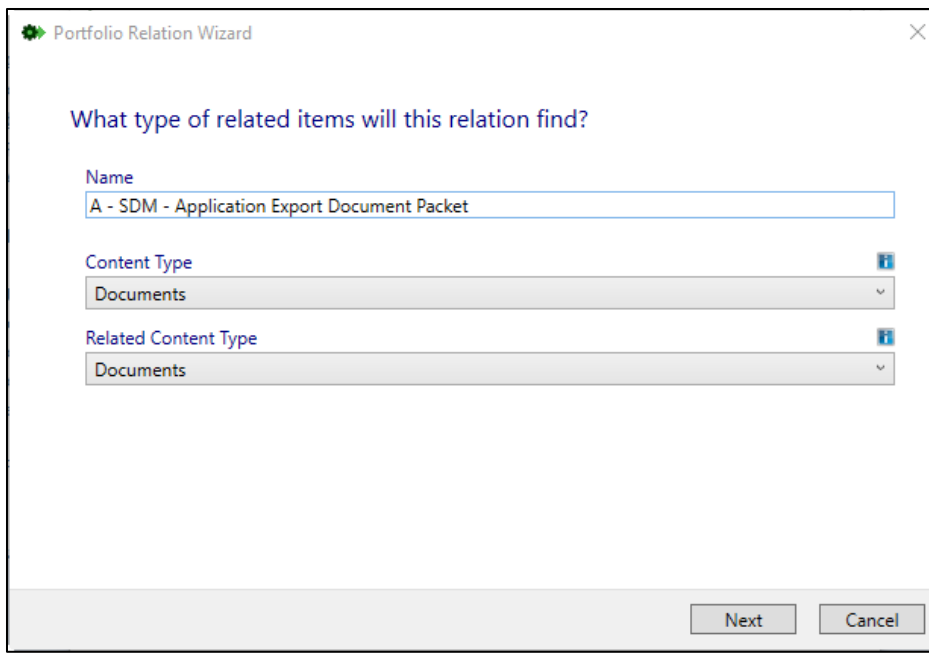
On the next screen, simply click **Next**.

On the following screen, you will want to select **Folder Type**, and select the folder you created earlier. Click **Next**, then **Finish**.
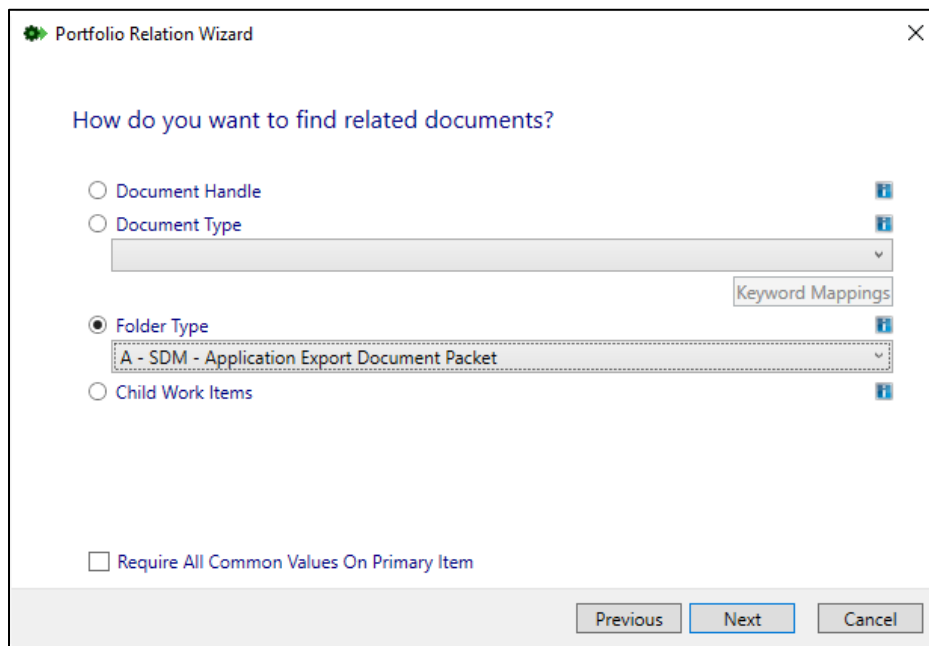

Configuring a Document Packet

To configure the Document Packet itself, you will need to move back into the Configuration client. To be safe, if you didn't close it while configuring your portfolio relation, you may want to relaunch the client, to ensure the changes you made are picked up.

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Once you are ready, go to **Document** > **Document Packets**. Type in the name of your packet, and click **Create**. Again, it is helpful if you keep the name same as the folder and Portfolio Relation.
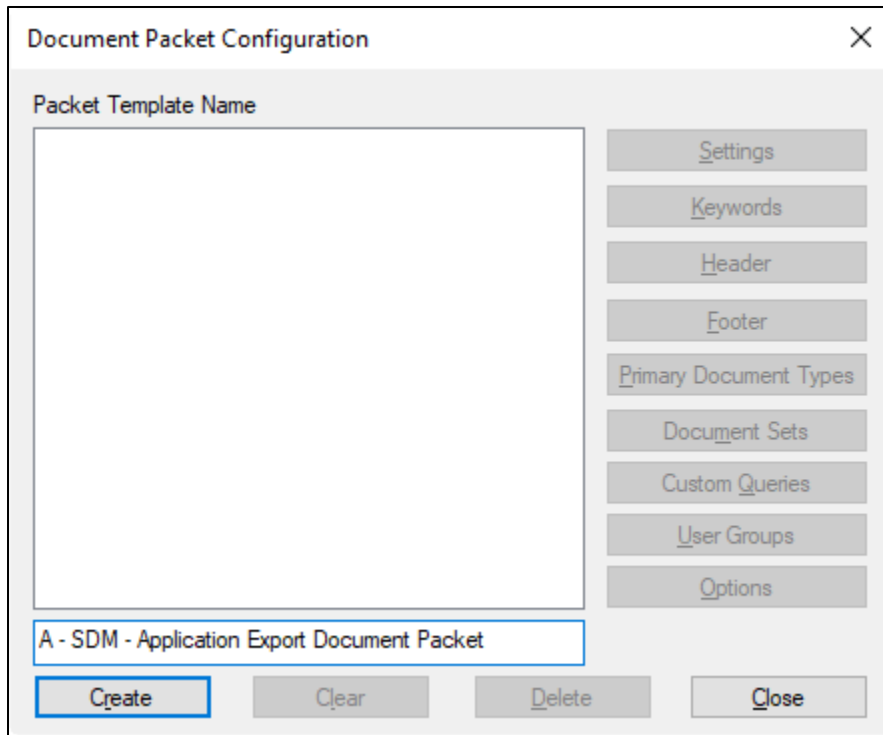
On the following screen, you will need to select the **Document Type** that you want the packet to be stored in once it is complete. Select the document type, and click **Save**. Keep in mind that if you want to use a new document type to store completed packets, it will need to already be configured in order to choose it from this list.
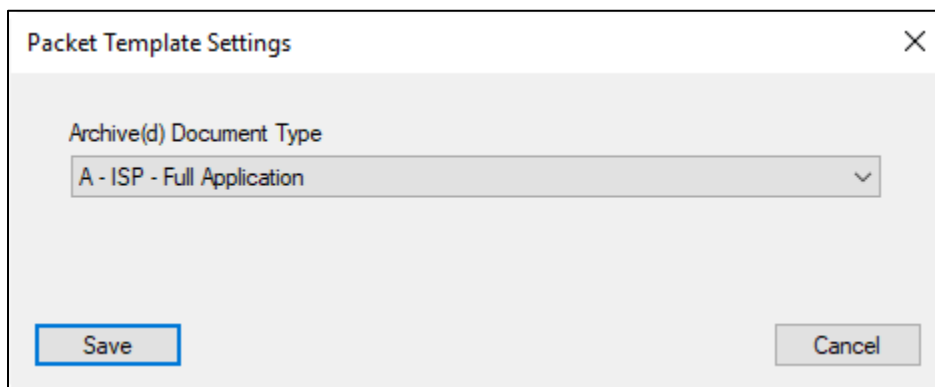
Choose the same user groups that were assigned to the folder, making sure to also include the MANAGER group. Find the desired group(s) in the Available list and move them to the Selected list using the **Add** button or by double clicking. Then **Close** the window.

From the Document Packet Configuration window, click the **Keywords** button.

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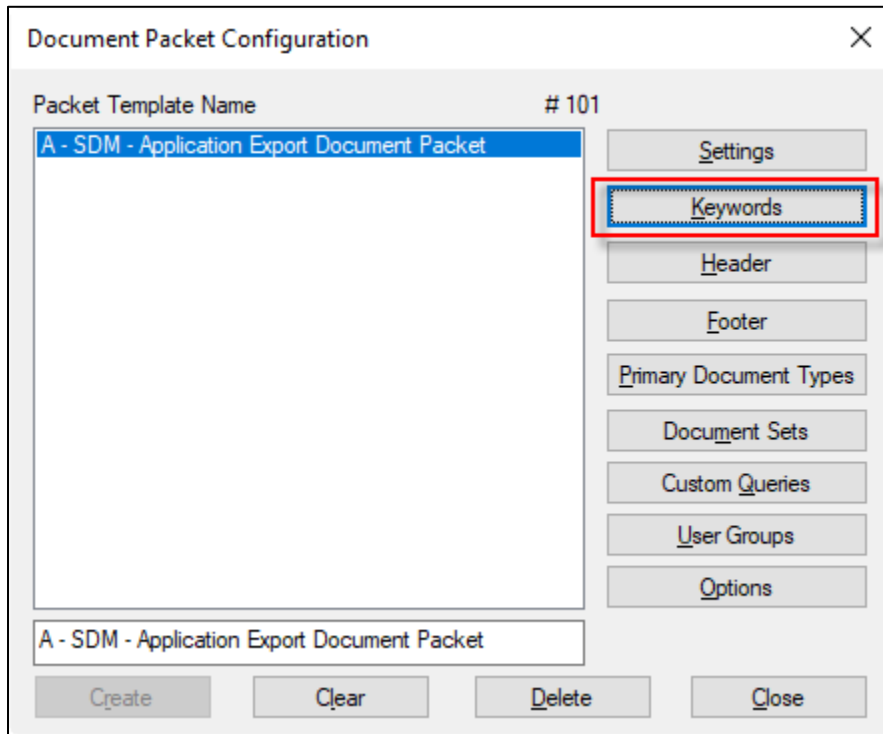
This screen will allow you to configure what keywords you want to be present on the document packet when it is stored in the specified document type. Select the keywords you want from the list on the left.

- Click **Do Not Inherit Keyword Value**, or double-click a Keyword Type, to add the Keyword Type to the packet template without automatically setting a value.
- Click **Inherit Keyword Value** to add the Keyword Type to the packet template and automatically set its value to the corresponding Keyword Value for the primary document.

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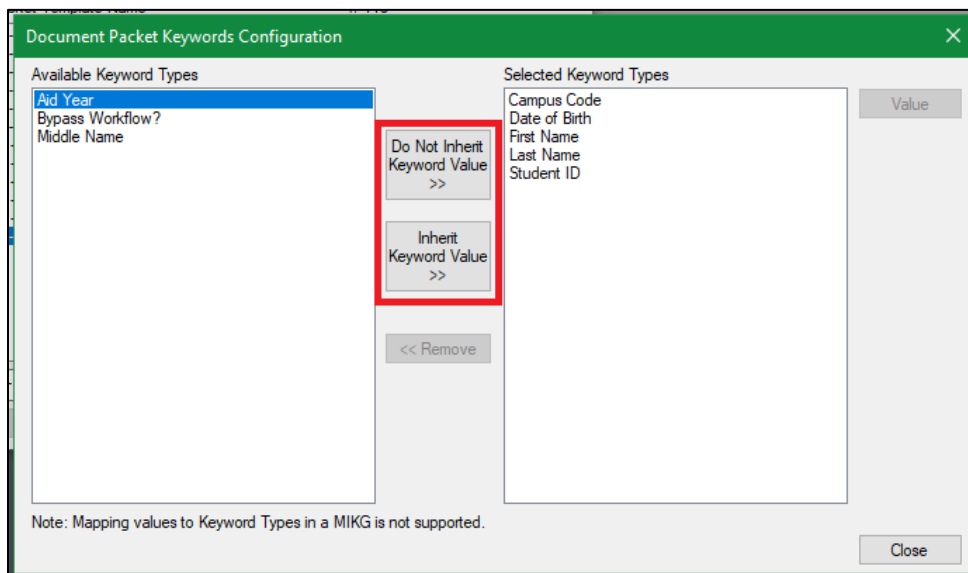
To configure the value for an assigned Keyword Type, select the Keyword Type in the **Selected Keyword Types** list and click the **Value** button.

NOTE: This will already be done for any items selected using the **Inherit Keyword Value** option in the last step, but you can use this to modify those values if necessary.

Enter any combination of static text or available variables into the **Keyword** field. Use the available variable buttons to insert a variable. You can also manually type the variable symbols into the Keyword field or use the Keyword Type drop-down menu and select the keyword you want to use. These should have a one-to-one relationship, e.g. Student ID configured to Student ID, First Name configured to First Name, etc.

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Once the values are configured as desired, click **Save**.

When all keywords have been configured, click **Close**.

From the Document Packet Configuration window, click the **Primary Document Types** button.

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Here, you will select the document types that you want to be able to create a document packet from. This means whenever you are viewing a document of this type, you can either right-click on it or go to the Document tab to create the packet. Many times, this list will be the same as the document types you configured in your folder.

Find the desired document types in the Available list and move them to the Selected list using the **Add** button or by double clicking. Then click **Close**.
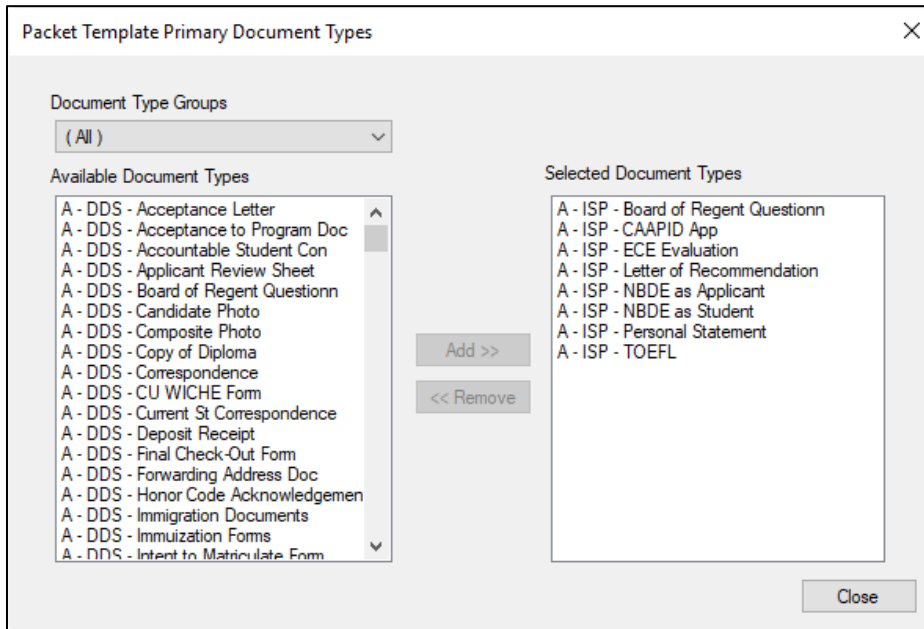
From the Document Packet Configuration window, click the **Document Sets** button.

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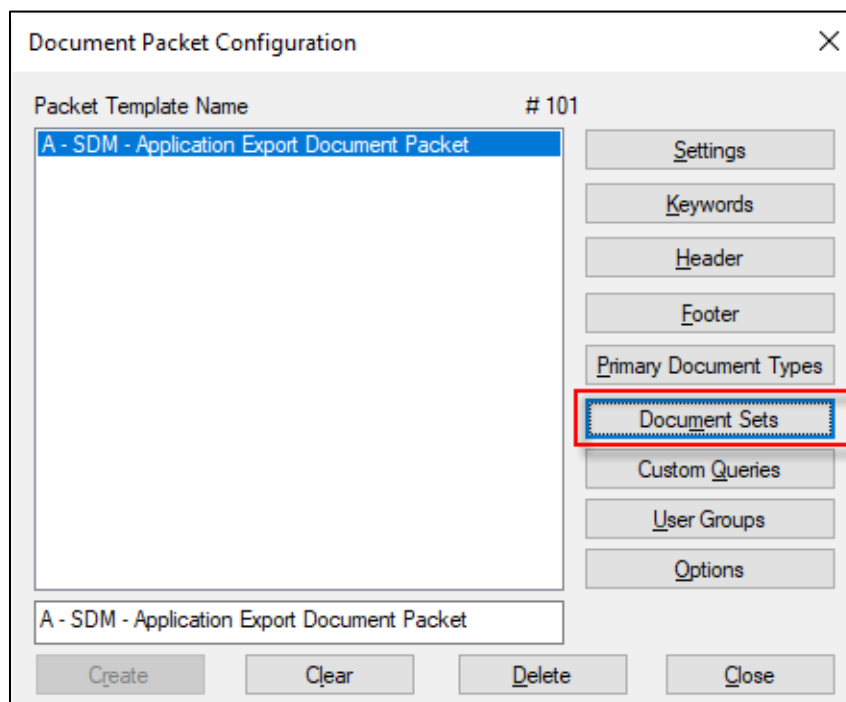
At the screen that appears, click **Create**.
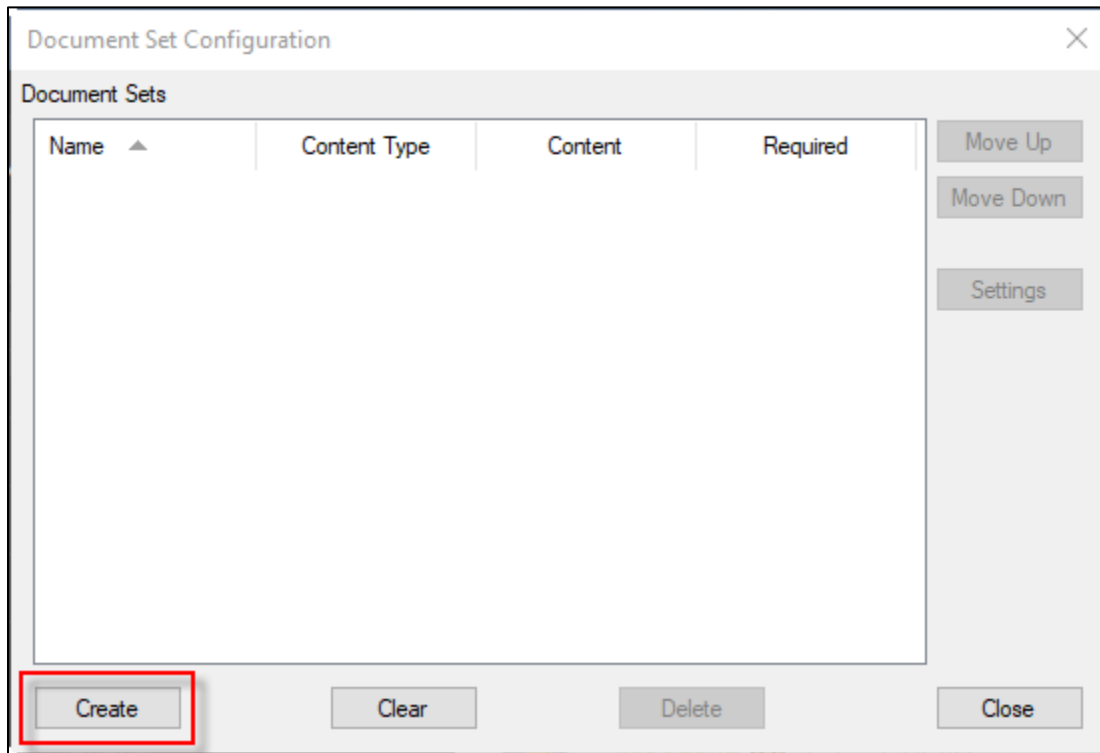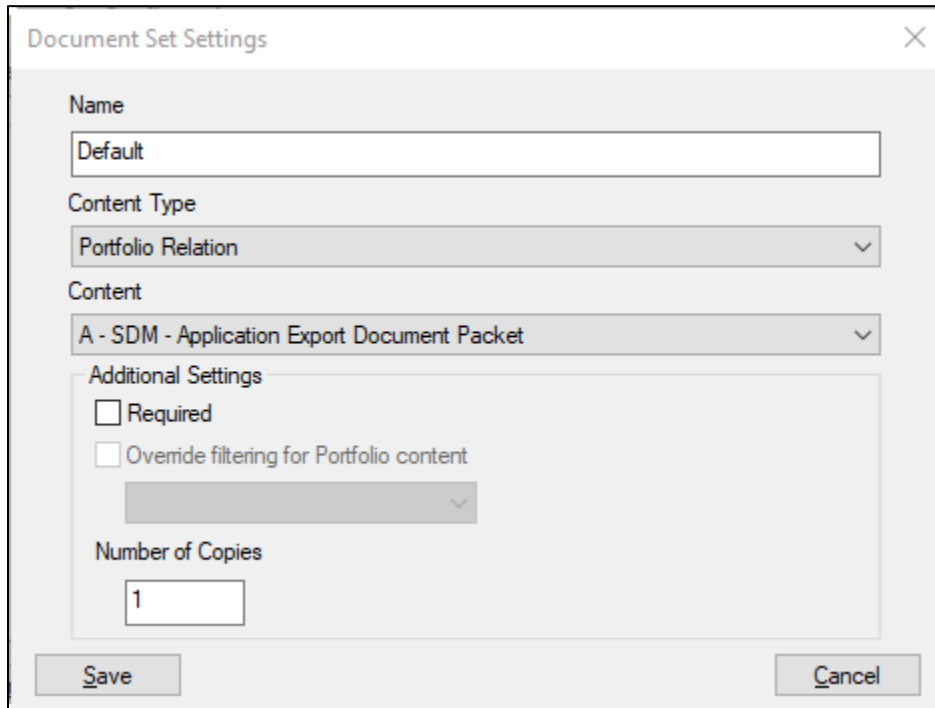
Give your document set a name. You do not need to use a naming convention here.
Set the **Content Type** to "Primary Item." You can leave the other settings as is. Click
Save.

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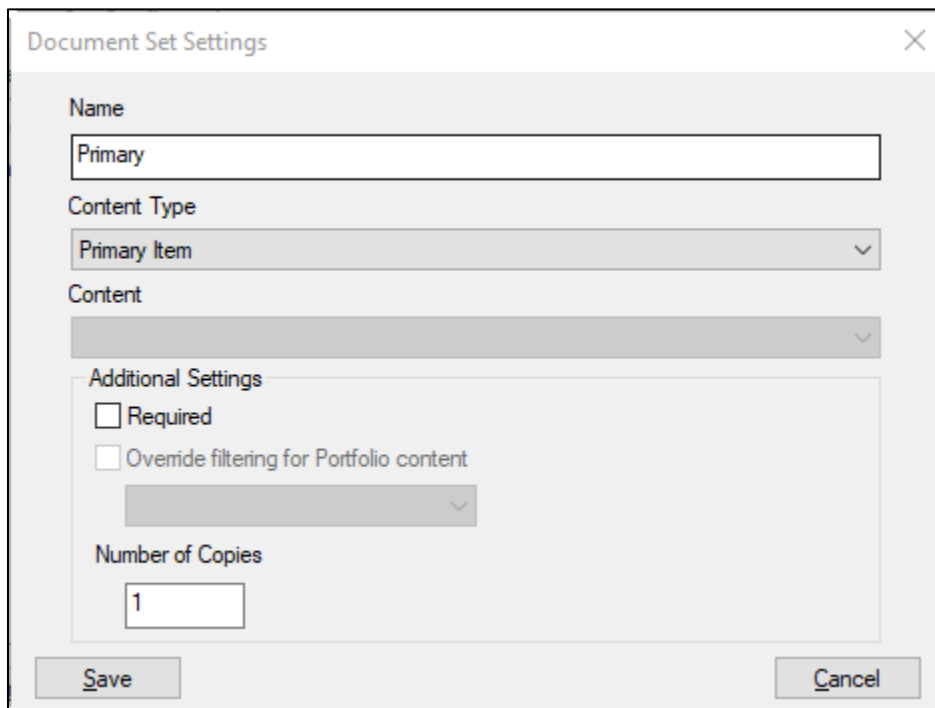
Click **Create** again. Give this set another name, different from your first set. Again, you do not need to use a naming convention.

This time, set **Content Type** to "Portfolio Relation," and set **Content** to the name of the Portfolio Relation you built in Studio. You can leave the other settings as is. Click **Save**, then click **Close**.

Document Set Settings   ✕

Name

Default

Content Type

Portfolio Relation ⌄

Content

A - SDM - Application Export Document Packet ⌄

Additional Settings

☐ Required

☐ Override filtering for Portfolio content

⌄

Number of Copies

1

Save   Cancel

If you know your users will frequently add "non-standard" documents to the packet, you can make it easier for them to find said documents by attaching a Custom Query to the packet. To do so, first create the custom query if it does not already exist. Refer to the System Administration MRG for more information if needed. Once the custom query is configured, click the **Custom Queries** button at the Document Packet Configuration window.

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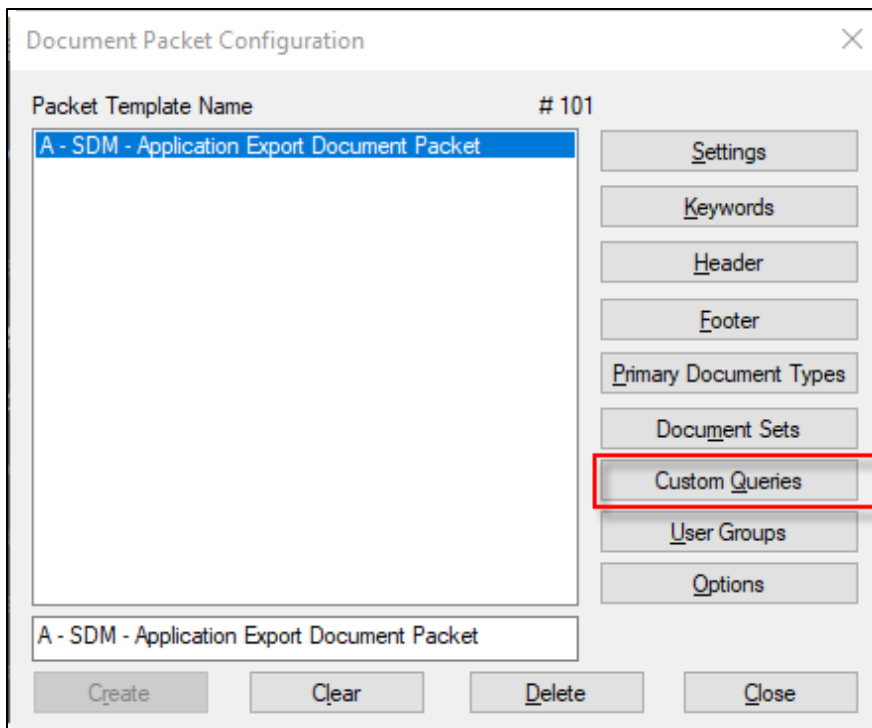
Find the desired custom query in the Available list and move it to the Selected list using the **Add** button or by double clicking. Then click **Close**.
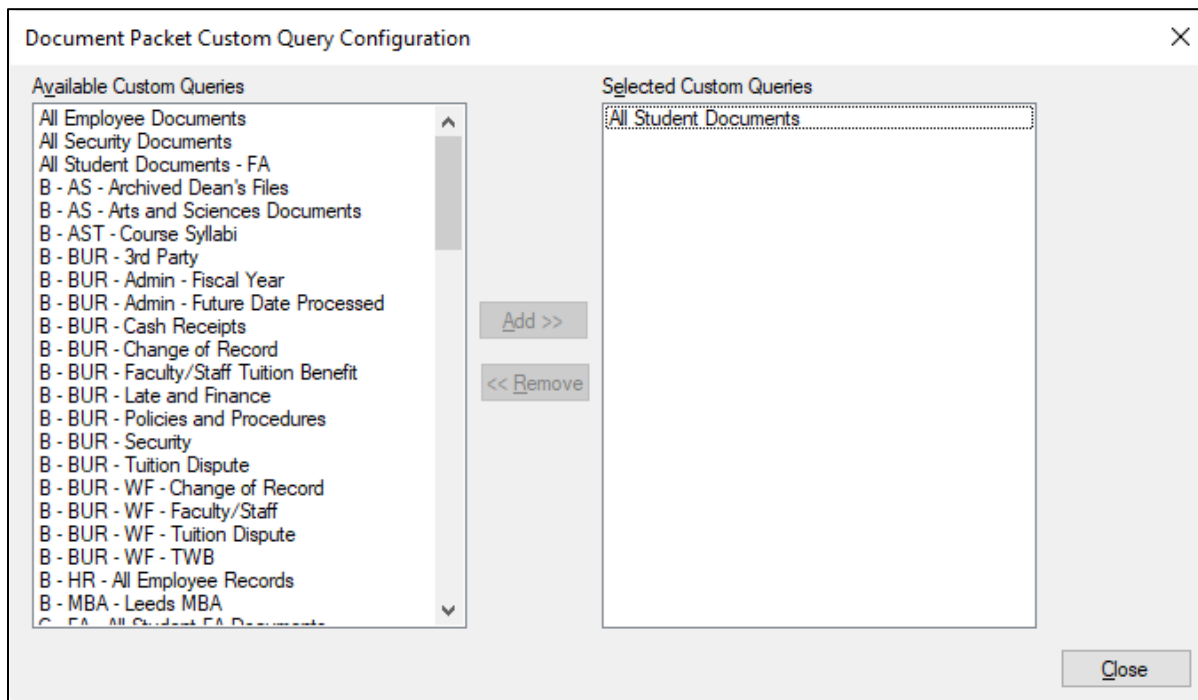

From the Document Packet Configuration window, click the **User Groups** button.

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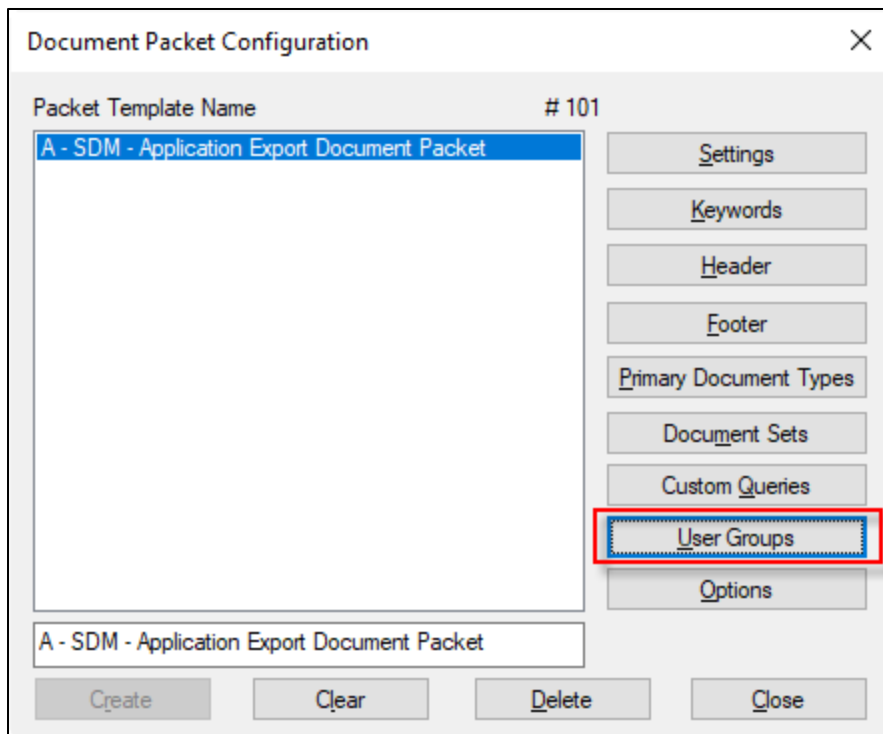
Here you will add who can actually create a document packet in the Unity Client. Find the desired group(s) in the Available list and move them to the Selected list using the **Add** button or by double clicking. Make sure to include the MANAGER group!
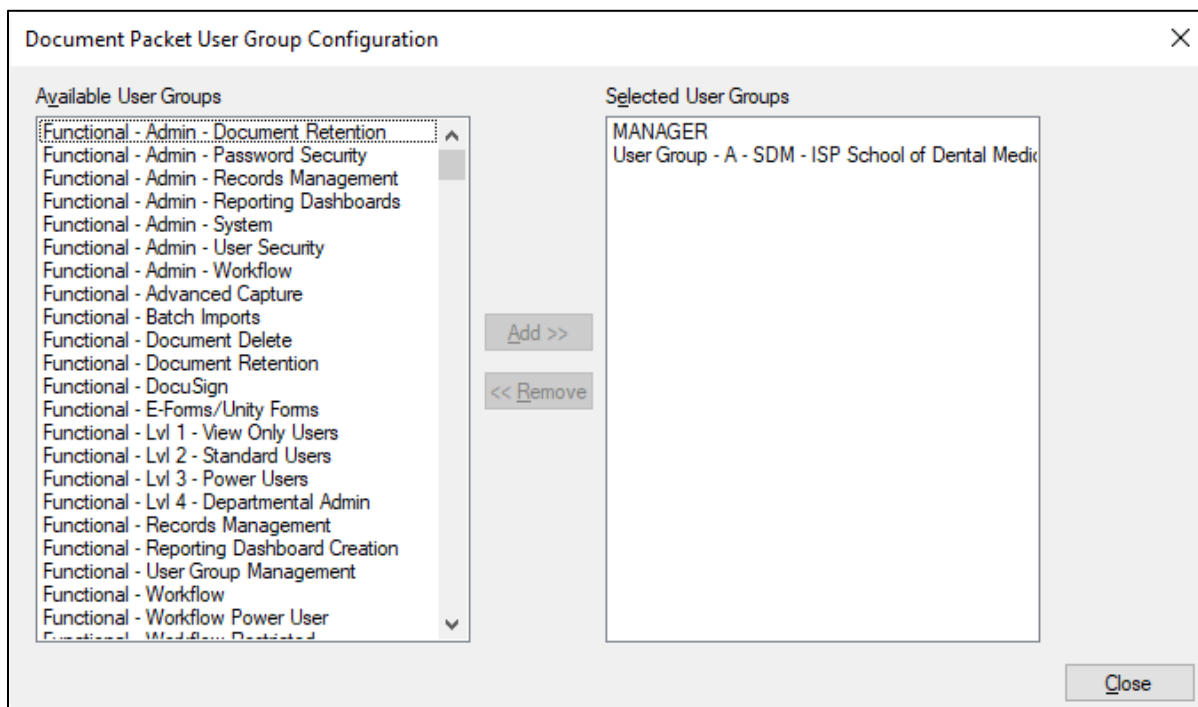
From the Document Packet Configuration window, click the **Options** button.

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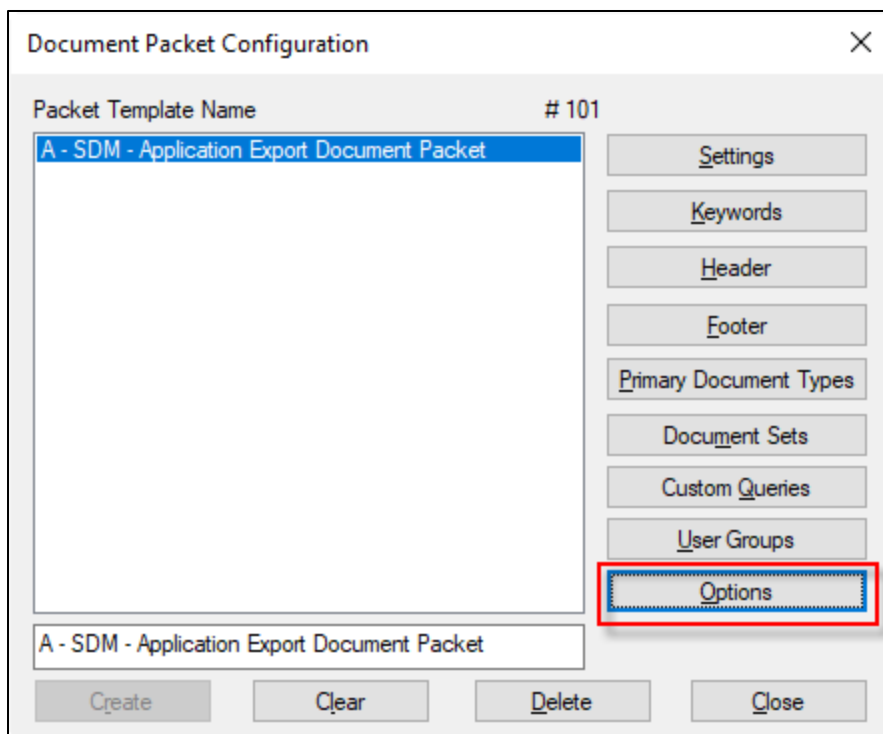
These options are for making it easier to create document packets. Below are the suggested options, but you can deviate from these if you would like. You can read about the various options in the Document Packets MRG.
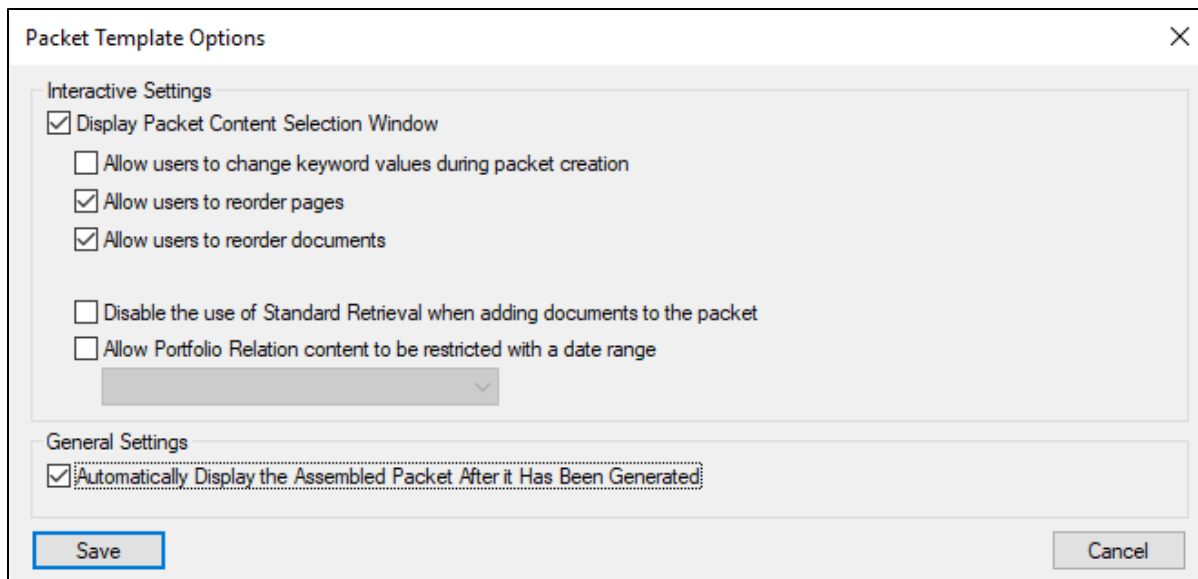
Generating a Document Packet

Document packets can only be created using the Unity Client.

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To create a document packet, you will first need to find a document in one of the "primary" document types you configured above. You can find the document by searching either via custom queries or document retrieval. This guide will use custom queries.

Once you search for the individual's documents, and have the hit list in front of you, select the document you want to kick off the process. You can either right-click on the document and select **Generate Packet** from the context menu, or you can use the **Generate Packet** button on the Document tab of the menu.
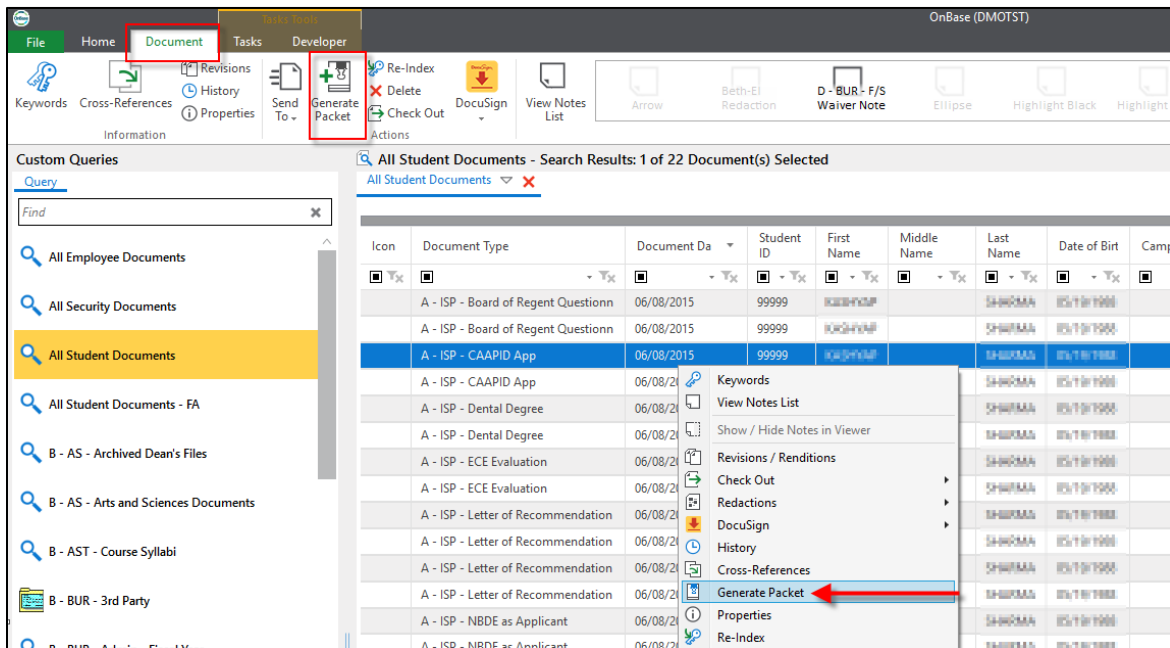
NOTE: Depending on how you configured the packet options, you may see different screens. The following steps are based on the recommended options listed above.

In the window that appears, there will be a list of document types for the student based on the configurations you built in your folder. You can click any of the documents to view the pages, reorder them by clicking and dragging the pages, or even de-select them using the checkboxes if you do not want to include them in the packet. You can also re-order the documents themselves, or de-select them as well.
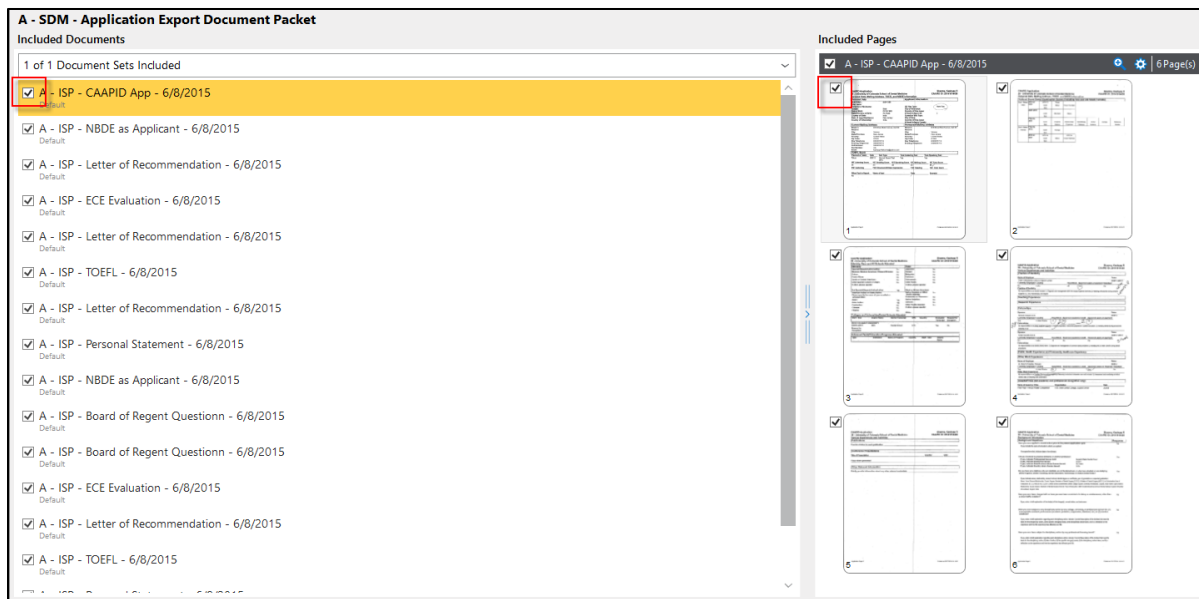
If you need to add additional documents to the packet, you can click the **Add Documents** button.
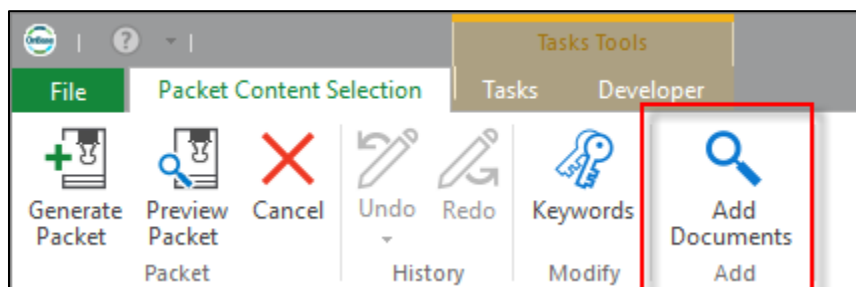
This will open a new window. You can search for documents using either the custom query you added to the packet, or you can use "Document Search," which is the same as Document Retrieval.
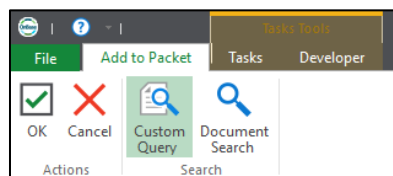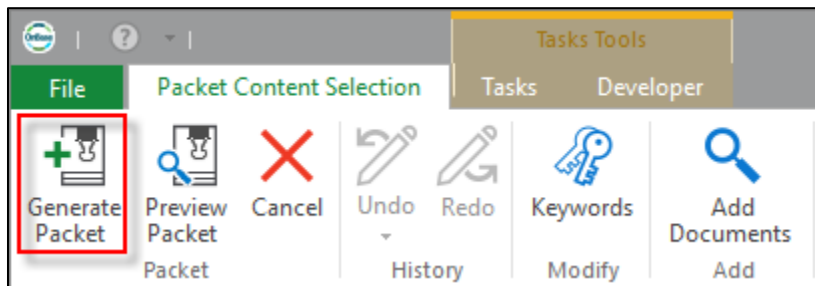

Once you select the document(s) from the search results list, click **OK**.

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Once you have all the documents necessary for your packet, click the **Generate Packet** button.

The packet will be created and stored in the specified document type with the specified keywords, and will open in a new window.

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