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OnBase
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OnBase Guide - DIP to Virtual E-Form

Goal: To use DIP to import an index file (spreadsheet) and create a new virtual e-form document for each record in the file.

Complexity Level: Departmental Administrative Users, Functional End Users

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Background

DIP (Document Import Processor) typically uses an index file paired with a set of documents in order to import the documents using keyword values from the index file. However, DIP can also be used without documents using only an index file. This imports the keyword values to the database without storing a document to the disk group.

In order to view this content in the clients, an HTML form is configured for the document type. When this content is retrieved, the keyword values are displayed using the HTML form and this is known as a virtual e-form.

Once these e-form documents are created, they can be routed through workflow or used in any of the other ways you would interact with a document in OnBase. For example, you could create Unity forms that can then be sent out using formpop to collect more information or perform processing on related documents for the same student/employee/etc.

Prerequisites

You will need to have the Configuration client installed and have the appropriate user privileges to configure the document type and DIP process.

You will need to be familiar with basic HTML to create the form document.

You will also need a license for DIP. We own a limited number of DIP licenses. Please contact UIS_DM_Support@cu.edu if you do not already have access to a license.

As always, this process should be configured and tested in non-production prior to migration to production.

Resources

More information can be found in the following MRGs:
- E-Forms
- Document Import Processor (DIP)

Through our premium subscription, you have access to a DIP to Virtual E-Form Solutions course in addition to a variety of DIP trainings including a hands-on lab and some E-Form trainings.

If you would like to schedule the DIP, refer to our Scheduled DIP/DRIP Setup guide.

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Document Type Configuration

Create your document type according to the [OnBase Naming Conventions](#) and complete any other necessary configuration (user group access, auto-name string, etc.). The default file format for the document type should be "Virtual Electronic Form."

Each value you want to save from your index file will need to be assigned to a keyword value, so assign the necessary keyword types to your document type. Make sure to include the Campus Code keyword type with a default value and to check whether any existing keyword types can be used before creating new ones.

Create your HTML form according to the guidelines in the E-Forms MRG with a field for each value. This can be a very simple form, for example:

```
<html>
<head>
<title>Form Name</title>
</head>
<body>
<form method="POST">
<p><input type="text" name="OBKey__113_1" size="9"></p>
<p><input type="text" name="OBKey__909_1" size="20"></p>
</form>
</body>
</html>
```

You will need to know the keyword type numbers for the keyword types assigned to your document type. There are reporting dashboards available in the Configuration category that will make this easier:

- OnBase Keyword Type List
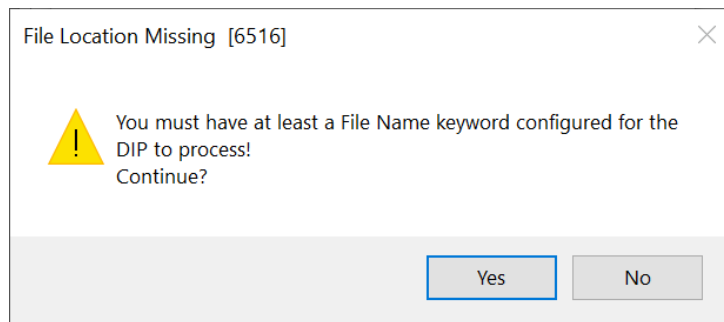- OnBase Keyword Types & Options per Document Type

Import the HTML form to the SYS HTML Forms document type. Add a description in the Description keyword value so you can identify your form within the document type.

Then, go back to your document type configuration, click the E-Form button and choose the HTML form you just imported from the list of available forms.

DIP Configuration

Configure your DIP format as described in the DIP MRG. This configuration will vary greatly based on your index file, how it is being created, and your desired outcome. The DIP configuration is the same for e-forms as for any other documents.

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If you see this message when saving your DIP configuration, it can be dismissed and ignored.

When you are ready to test your DIP configuration, you can do so in the Thick client.

If you would like to schedule the DIP, refer to our Scheduled DIP/DRIP Setup guide.