OnBase Guide - Unity Form - Sharing for Public Use (Portal)

Goal: To share a Unity Form such that department and campus users can access and fill out the form from within the portal (or after using portal authentication). The portal authentication can then provide information to fill form fields.

Complexity Level: Departmental Administrative Users, Departmental Unity Form Developers

4/30/2025

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Background

Unity forms can be accessed and utilized from within the OnBase Unity and web clients, but they can also be “shared” such that users outside of OnBase can fill them out as well. This can be done with a “basic” URL that does not pre-fill any information or use any authentication.

Alternatively, you can create “Integrations” for the form that will allow certain field/keyword values to be filled in by the PeopleSoft portal (or any other Identity management system that can authenticate users and process JavaScript code) based on the account used to log in to the portal. This guide covers the steps to setup a “portalized” form URL that will prompt users to authenticate to the portal using their campus credentials and pass the student (CS) and/or employee (HR) ID associated with their credentials to the applicable form field(s).

At this time, you will only be able to pull in one (or both) of the following fields for pre-population from portal data:

- Employee ID (HR Emplid)
- Student ID (CS Emplid)

To automatically fill other values, such as the name and DOB data based on the Employee ID or Student ID, you will need to add an auto-fill keyword set and/or Unity scripts to the form.

You will need to set up the integration **BEFORE** you create the share URL, as the integration will add additional fields that need to be populated on the Share URL screen.

Please keep in mind that each portal link will have to be individually configured by the portal team so it is important to get the OnBase configuration correct up front. Additionally, you will need to configure the form and the integration in all environments (DEV, TST, STG, and PRD) where the form will be used and tested. Once the next refresh occurs, whatever configuration exists in production will exist in the lower environment, so it’s not always necessary to do every environment up front. Typically DMOTST and DMOPRD are requested.

If necessary, you can also have a tile set up in the portal for your form. However, most forms do not have a tile in the portal and are accessed directly using the URL.

Prerequisites

The Unity client must be installed and your user account must be in the *Functional - Developer - Unity Forms* user group. If you do not see the Forms Designer menu option, please contact one of the OnBase Certified Department Administrators to grant that access.

The document type used to store the Unity form must already be created in Configuration, with any desired keyword types assigned to the document type, prior to creating the Unity form template.

The Unity form template must be created, tested, published and ready for public use before the integration or URL are created. This guide does not cover creation of Unity Forms. Please refer to the Unity Client MRG and various Unity Form training videos, including [Unity Forms: Introduction](#) (34 mins).

Contact UIS_DM_Support@cu.edu for assistance.

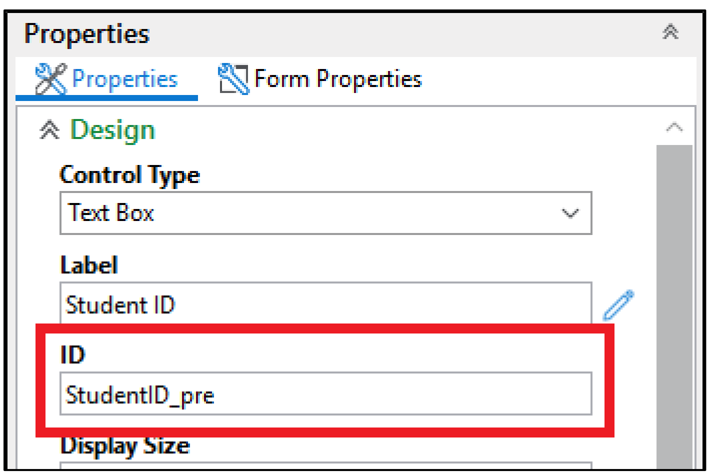
Unity Form Integration Setup

Form Field Setup

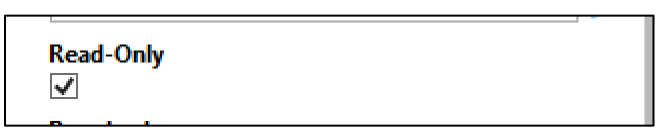
Use the following field **ID** on the form field(s) so that the portal teams will have consistent values to implement. You can change the form field ID without modifying anything else of the form. The **Label** (visible on the form) can be whatever you like but the ID should be one of these:

```
EmployeeID_pre
StudentID_pre
```

This is configured in the Properties panel:



You will also need to mark those fields as **Read-Only** by checking the box in the Properties panel or by using a custom action.



Values that are pre-filled on the form by an integration **cannot** be modified before submission. If the value is changed or exceeds the maximum character length for the form field/keyword type, the form submission will fail, so it's important that every pre-filled field be set to read-only to prevent issues with submission.

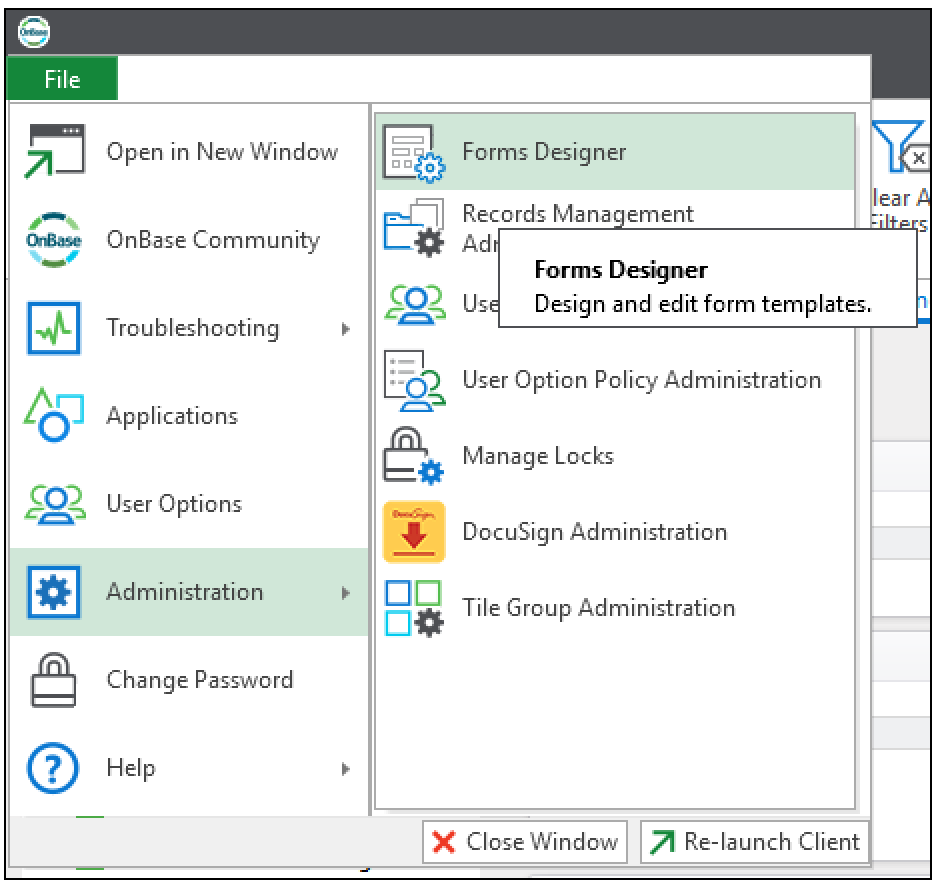
Integration Setup

An "integration" here in OnBase is essentially just a token that will be used to validate the parameters provided in the URL. If the validation fails, the form cannot be submitted.

The existing set of integrations (tokens) should suffice for all current needs. However, if desired, each department may create **one** department-specific integration. Integrations should not be form-specific or process-specific without extenuating circumstances to support that need.

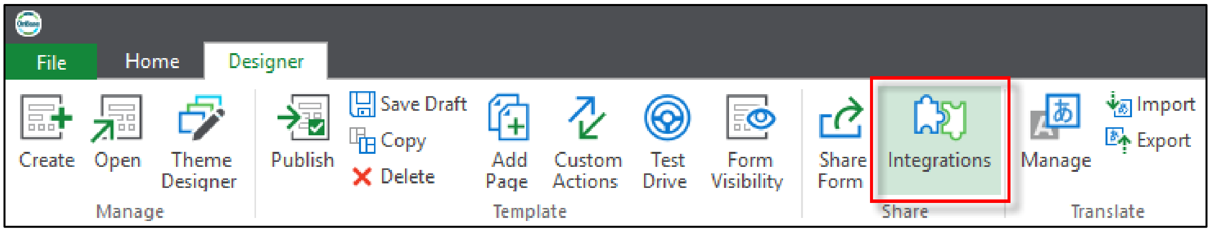
1. Log into the Unity client with an account that has the *Functional - Developer - Unity Forms* group permission tied to it so that you can access the Forms Designer.

2. Click **File**, go to the **Administration** menu option, and then select **Forms Designer**.

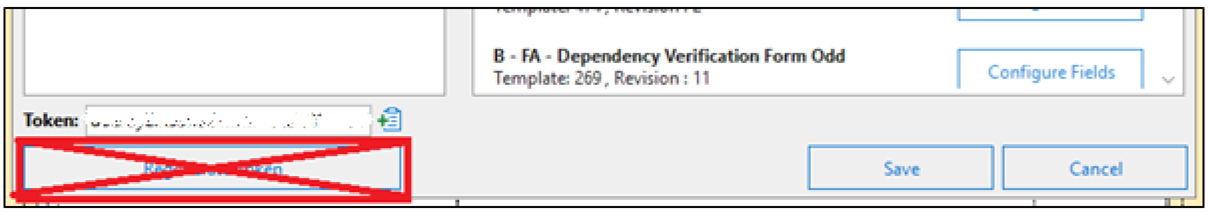


3. **Open** the desired template from the list. Integrations should only be created for "document" Unity forms (not "workflow" Unity forms).

4. Click the **Integrations** button on the Sharing tab of the menu.

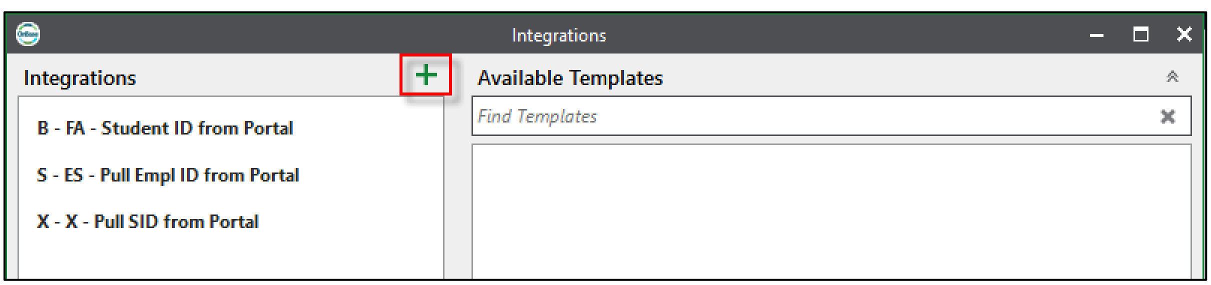


5. A new window will open. **NEVER** click the **Regenerate Token** button at the bottom. Regenerating the token will cause all URLs relying on the token to fail validation and none of those forms can be submitted.

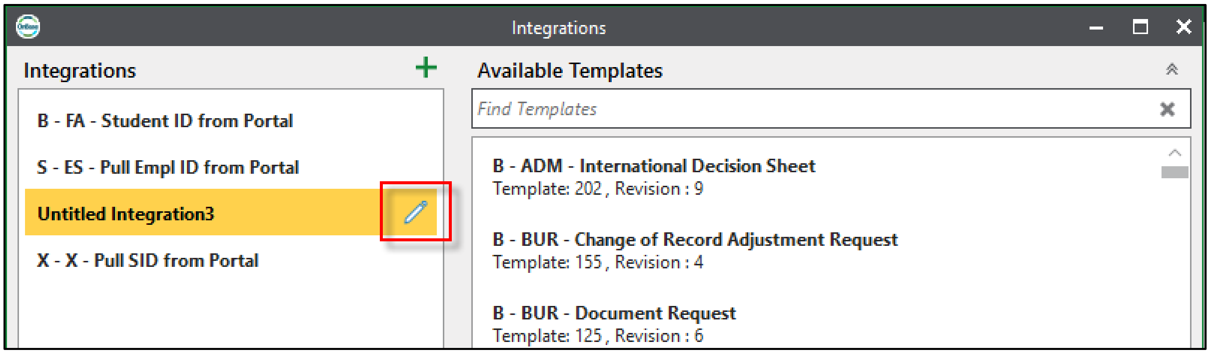


6. If you are using an integration which already exists (**this should be true in most situations**), select it from the list at the left. Skip step 7 and proceed to Step 8.

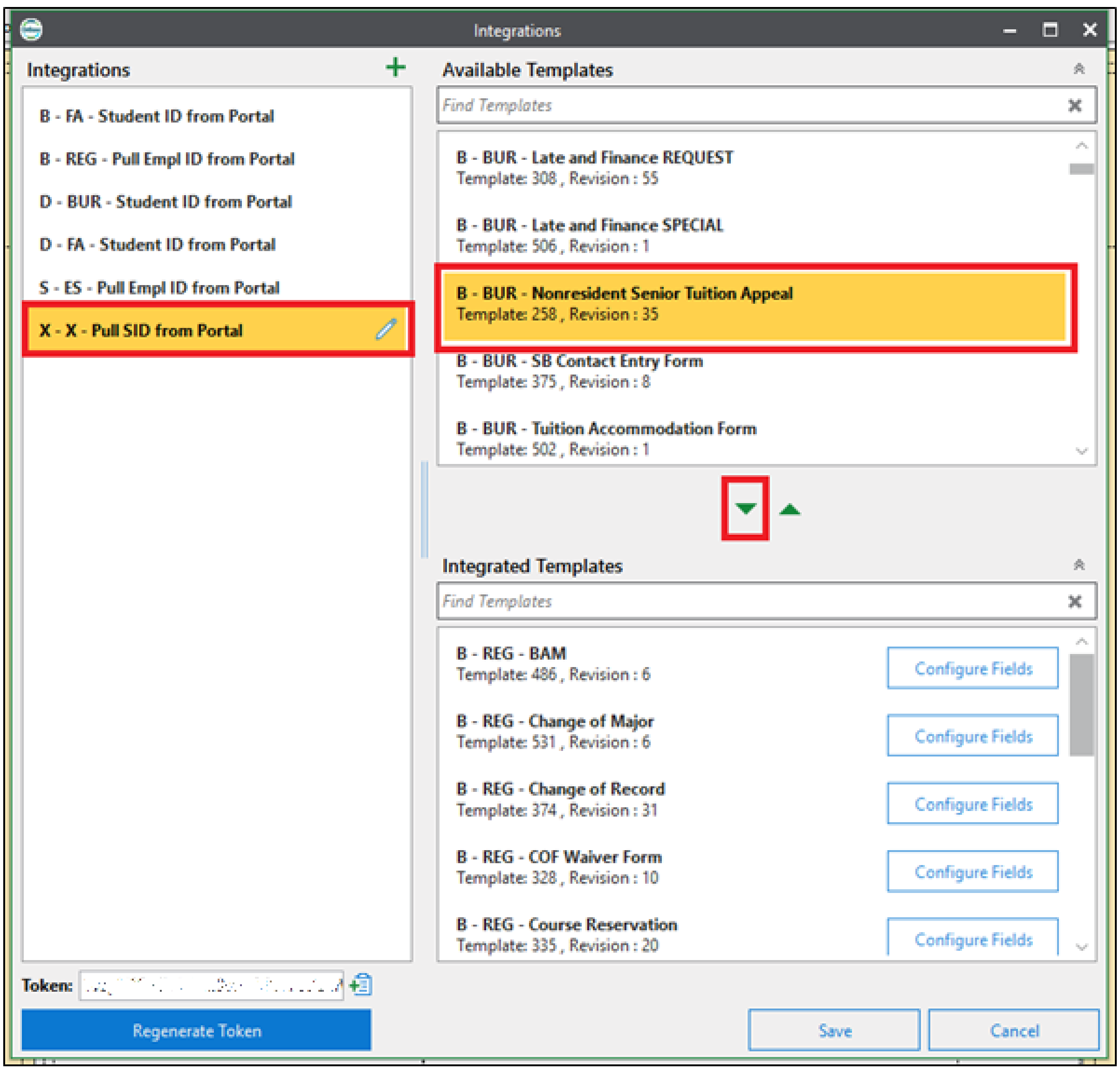
7. If you are creating a new integration (rare), click the plus (**+**) button next to the Integrations section header.



Click the pencil icon next to the new "Untitled Integration". This will allow you to rename it as needed. These should follow the standard naming convention of a campus and department prefix.

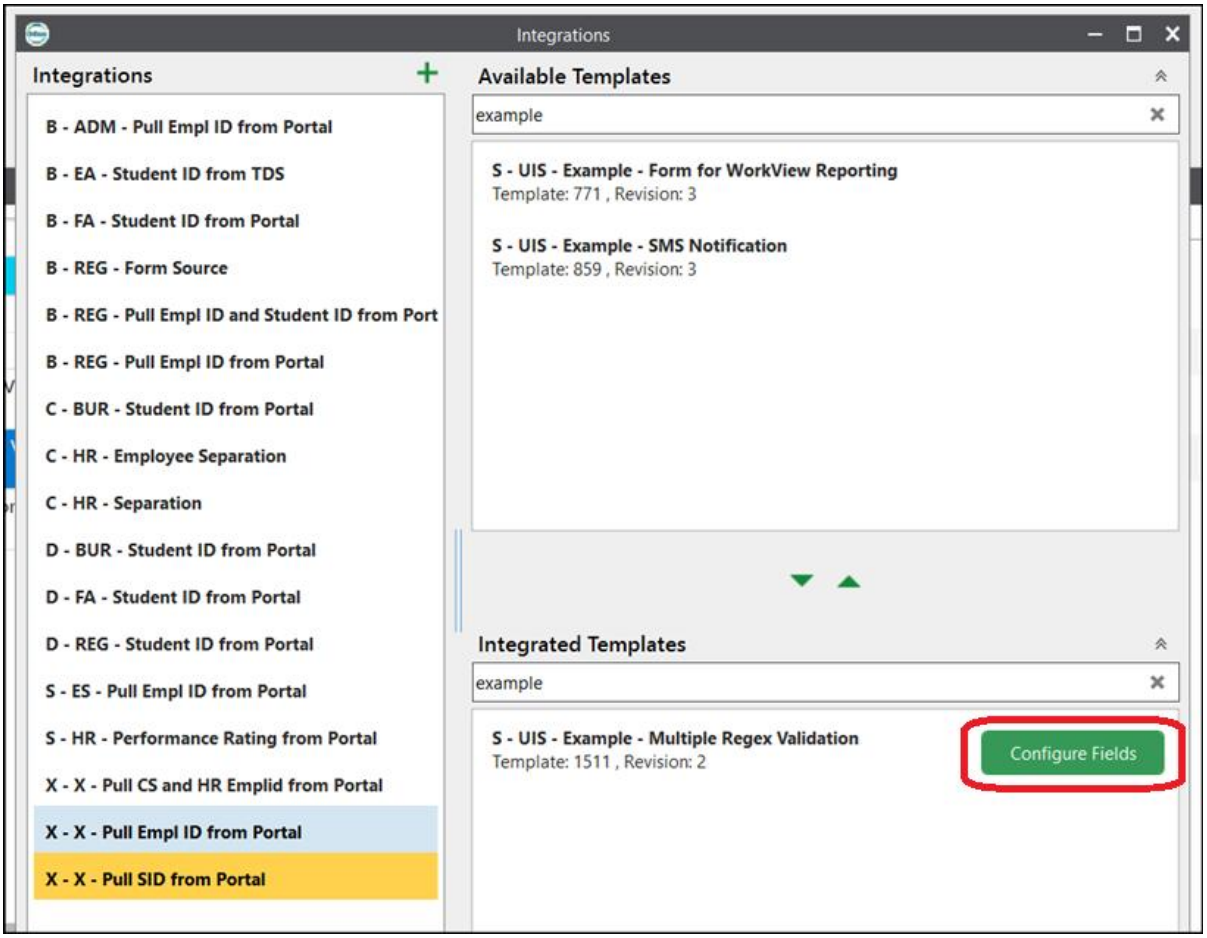


8. After selecting the integration from the list, locate the form template in the list of *Available Templates* and use the arrow button to move the form into the list of *Integrated Templates*. You can use the search bar above the list of available templates to narrow down the list.



Adding Fields to the Integration

9. Next to your form in the list of *Integrated Templates*, click the **Configure Fields** button.



10. Select the field (StudentID_pre or EmployeeID_pre) you wish to pre-populate in the *Available Form Fields* column and add it to the *Pre-populated Form Fields* column by clicking the indicated right arrow.

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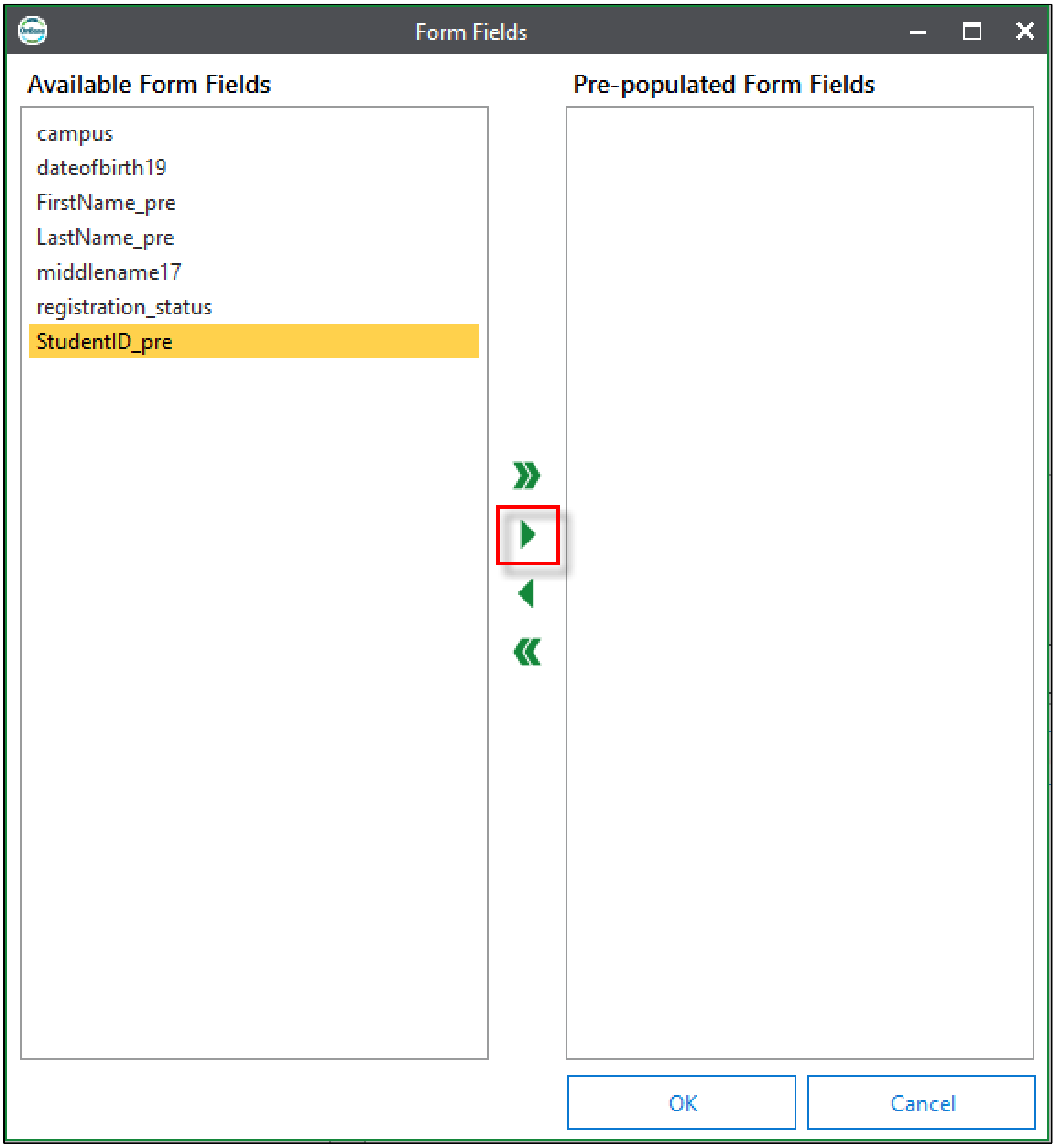
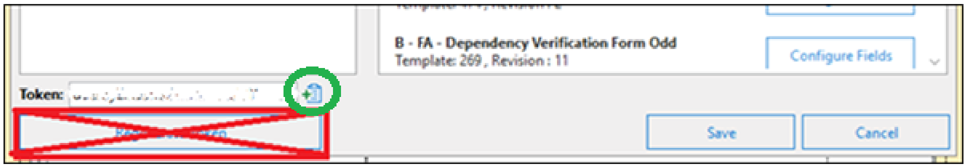


11. Click **OK** on the Form Fields dialog, then click **Save** in the Integrations dialog.

12. From the **Integrations** window, use the **Copy Token** button to copy the token.

    NEVER click the **Regenerate Token** button at the bottom. Regenerating the token will cause all URLs relying on the token to fail validation and none of those forms can be submitted.

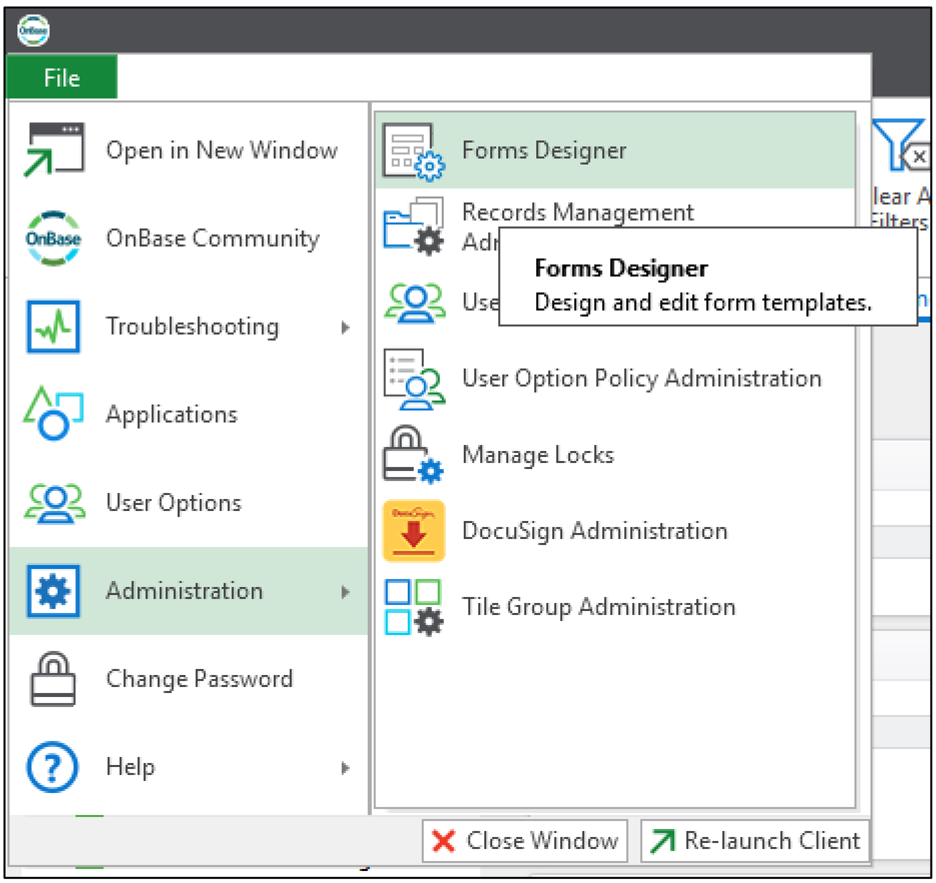
    Paste/save the token in another place, as you will need to give it to the portal team.



13. Click **Save** and you can close this window.

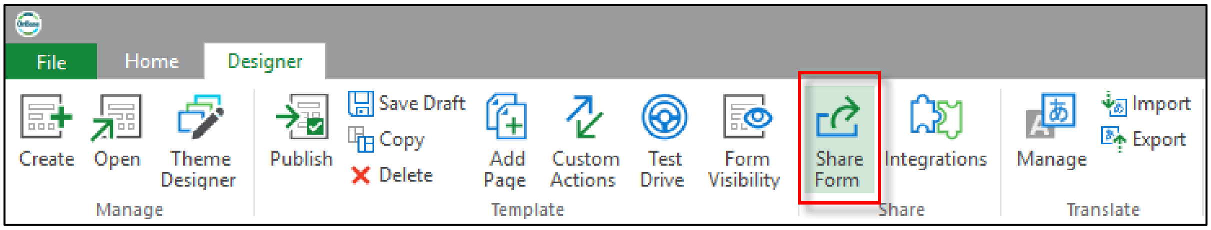
Creating the URL

14. Log into the Unity client. Go to **File**, choose the **Administration** menu option, and then select **Forms Designer**.

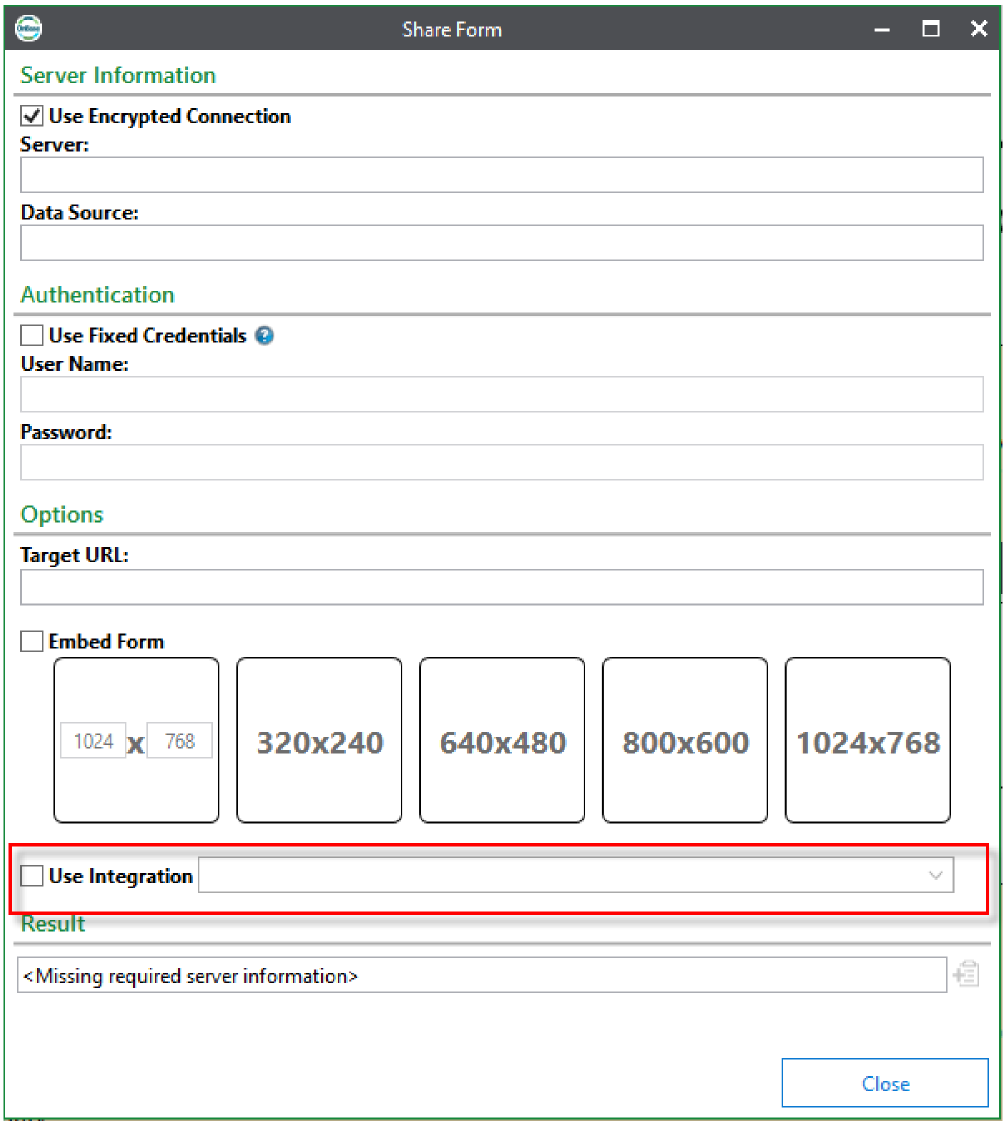


15. **Open** the desired template from the list. Creating the share URL should only be done for "document" Unity forms (not "workflow" Unity forms).

16. Click the **Share Form** button on the Designer tab of the menu.



17. A new dialog will appear. This will be slightly different than [“basic” URL configuration] as it includes a new “Integration” field.



18. Enter the appropriate value for the current environment in the **Server** field.

DEV	dm-devunityform.dev.cu.edu/UnityForms
TST	dm-tstunityform.qa.cu.edu/UnityForms
STG	dm-stgunityform.qa.cu.edu/UnityForms

PRD	dm-unityform.prod.cu.edu/UnityForms

19. Leave the **Data Source** field blank. Entering a value here will pose issues after configuration is refreshed from production to non-production.

20. Check the **Use Fixed Credentials** box and use these credentials for our standard service account. These credentials will be used to log into an OnBase account when the shared URL is used to submit the form, so that users without an OnBase account do not need to authenticate to access the form.

    While users are logging into their portal account, they are not logging in to their OnBase account (if they even have one). They are essentially borrowing this account for purposes of submitting the form. The integration steps in this guide allow their portal account to pass information to the form so we have some idea who was logged in even though we don’t get any OnBase account information for them.

User Name	S_UNITYFORMS
Password	ABCRT12394HHTS

    This account will have only the most basic privileges in OnBase and will only exist in a special group called *UnityForms Group - X - X* that will have the permissions and document types tied to it.

21. Enter the desired **Target URL**. This is the page that will load after the form is submitted.

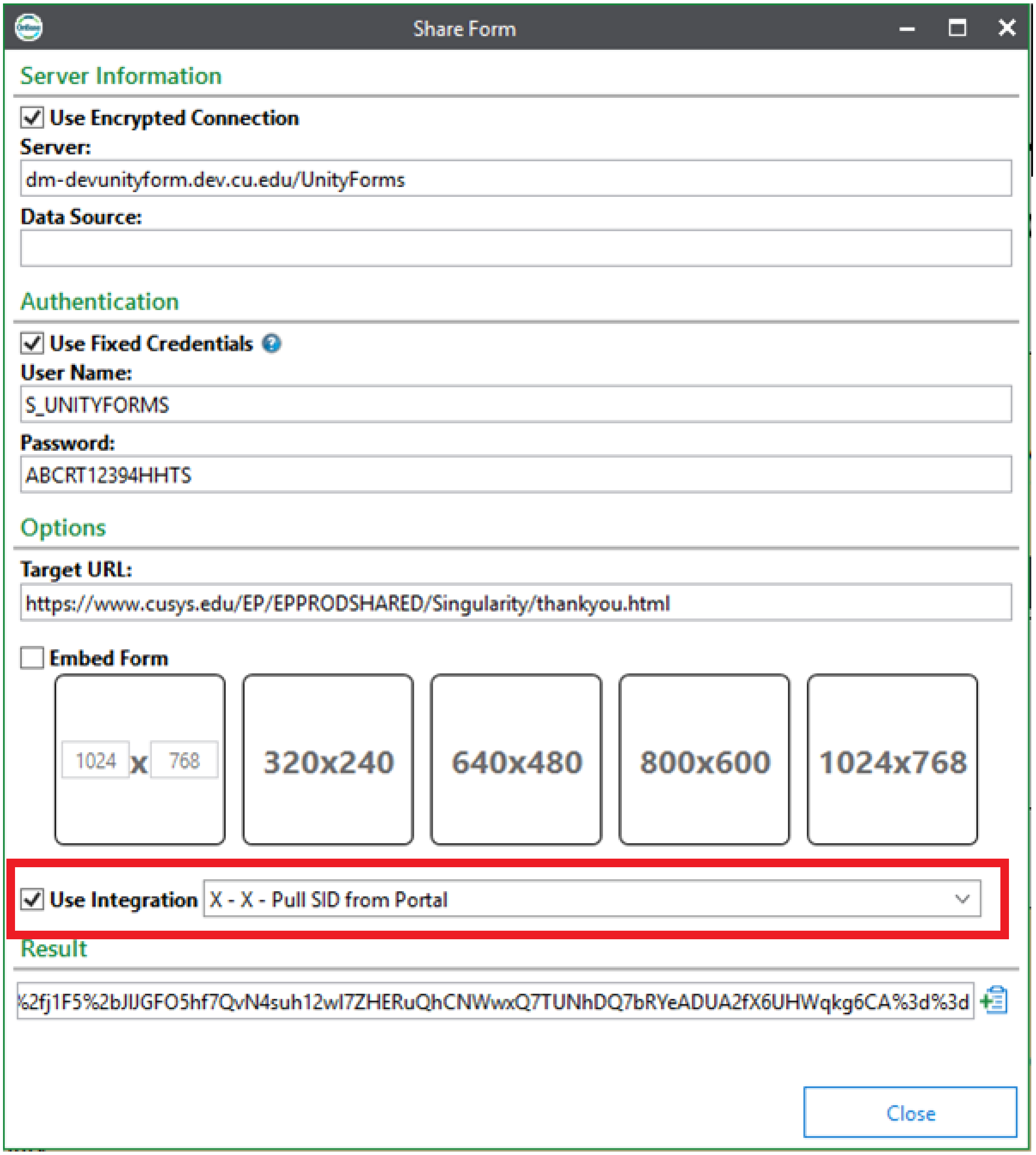
    You can use the following address, or another page of your choosing. Note that if you use something else and this URL changes, that will require re-configuration of the portal URL by the portal team.

https://www.cusys.edu/EP/EPPRODSHARED/Singularity/thankyou.html

22. Skip the **Embed Form** options; these should not be used.

23. Check the box for **Use Integration** and select the same integration you assigned to the form (only one should be available in this list).

24. This is what the “Share Form” should look like when completed.



25. At the bottom of the form is a small “Copy” button next to the URL (indicated by the arrow above). This is the URL that can be entered into a browser to submit the form. **Please save these URLs** in a place you can keep track of (such as a spreadsheet), as they are **not stored in OnBase in any way**.

26. Test that the URL loads your form in a browser before proceeding with a request to the portal team. If it does not work, make the necessary corrections before proceeding.

Request Configuration from the Portal team

Please allow at least a week for the portal team to complete their configuration.

27. Provide the information below to your campus portal team by emailing portalhelp@cu.edu. You can use the following example as a template.

Information Needed by Portal Team	Example Values
Requesting Campus	CUBLD
Requesting Office	Bursar's Office
Requested Completion Date	02/28/2021
Description	Change of Record Adjustment Request/Detail account adjustments to a student bill due to retroactive enrollment change.
Share URL (DEV, TST, STG, PRD)	• **DEV**: https://dm-devunityform.dev.cu.edu/UnityForms/UnityForm.aspx?d1=AUycsuCoekNPI3hyIzBySDFHR3IrfCntCuQwfvdXr%2fulBf2yyzrpbVlKbRVKHBJHNrbe%2fiaBUSeKmsdwvN03TIRtcnQ%2fz0LgKwh5IlPDHj8UZlDJVbgucEulQeOoqw0i9VxxHJBSKzhklRwGJNx4j • **TST**: https://dm-tstunityform.qa.cu.edu/UnityForms/UnityForm.aspx?d1=AUycsuCoekNPI3hyIzBySDFHR3IrfCntCuQwfvdXr%2fulBf2yyzrpbVlKbRVKHBJHNrbe%2fiaBUSeKmsdwvN03TIRtcnQ%2fz0LgKwh5IlPDHj8UZlDJVbgucEulQeOoqw0i9VxxHJBSKzhklRwGJNx4j • **STG**: https://dm-stgunityform.qa.cu.edu/UnityForms/UnityForm.aspx?d1=AUycsuCoekNPI3hyIzBySDFHR3IrfCntCuQwfvdXr%2fulBf2yyzrpbVlKbRVKHBJHNrbe%2fiaBUSeKmsdwvN03TIRtcnQ%2fz0LgKwh5IlPDHj8UZlDJVbgucEulQeOoqw0i9VxxHJBSKzhklRwGJNx4j • **PRD**: https://dm-unityform.prod.cu.edu/UnityForms/UnityForm.aspx?d1=AUycsuCoekNPI3hyIzBySDFHR3IrfCntCuQwfvdXr%2fulBf2yyzrpbVlKbRVKHBJHNrbe%2fiaBUSeKmsdwvN03TIRtcnQ%2fz0LgKwh5IlPDHj8UZlDJVbgucEulQeOoqw0i9VxxHJBSKzhklRwGJNx4j
Token (DEV, TST, STG, PRD)	• DEV: pfGd]q*Ejycasdfas8qtgszc{sf+237huxbM?jZ7zJzbujs • TST: pfGd]q*Ejycasdfas8qtgszc{sf+237huxbM?jZ7zJzbujs • STG: pfGd]q*Ejycasdfas8qtgszc{sf+237huxbM?jZ7zJzbujs • PRD: pfGd]q*Ejycasdfas8qtgszc{sf+237huxbM?jZ7zJzbujs
Form Field(s)	StudentID_pre
Intended Audience (Students or Staff)	Students
Needed in Portal	Yes / No (only need Portal URL)
- If the Above is "Yes"	
- Which Portal	MyCUinfo / UCD Access / MyUCCS / System (CU Resources)
- Location in Portal	Homepage name
- Name in Portal	(30-character limit)

NOTE: If configuring URLs and integrations in non-production for items created since the last refresh, these may need to be reconfigured after the next refresh from production in order to continue to work properly.

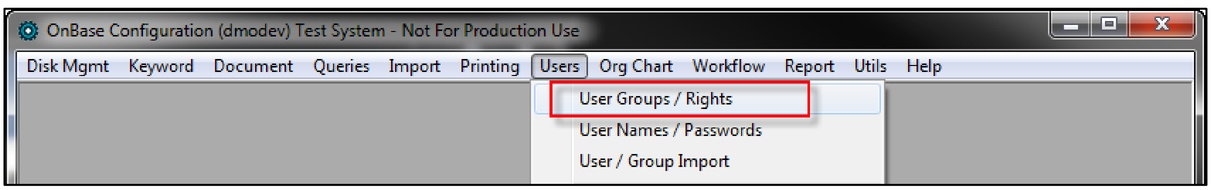
The UIS ECS team coordinates with the portal team during a refresh of DMOTST or DMODEV, but cannot guarantee continuity of functionality for all URLs.

In the OnBase Configuration Client

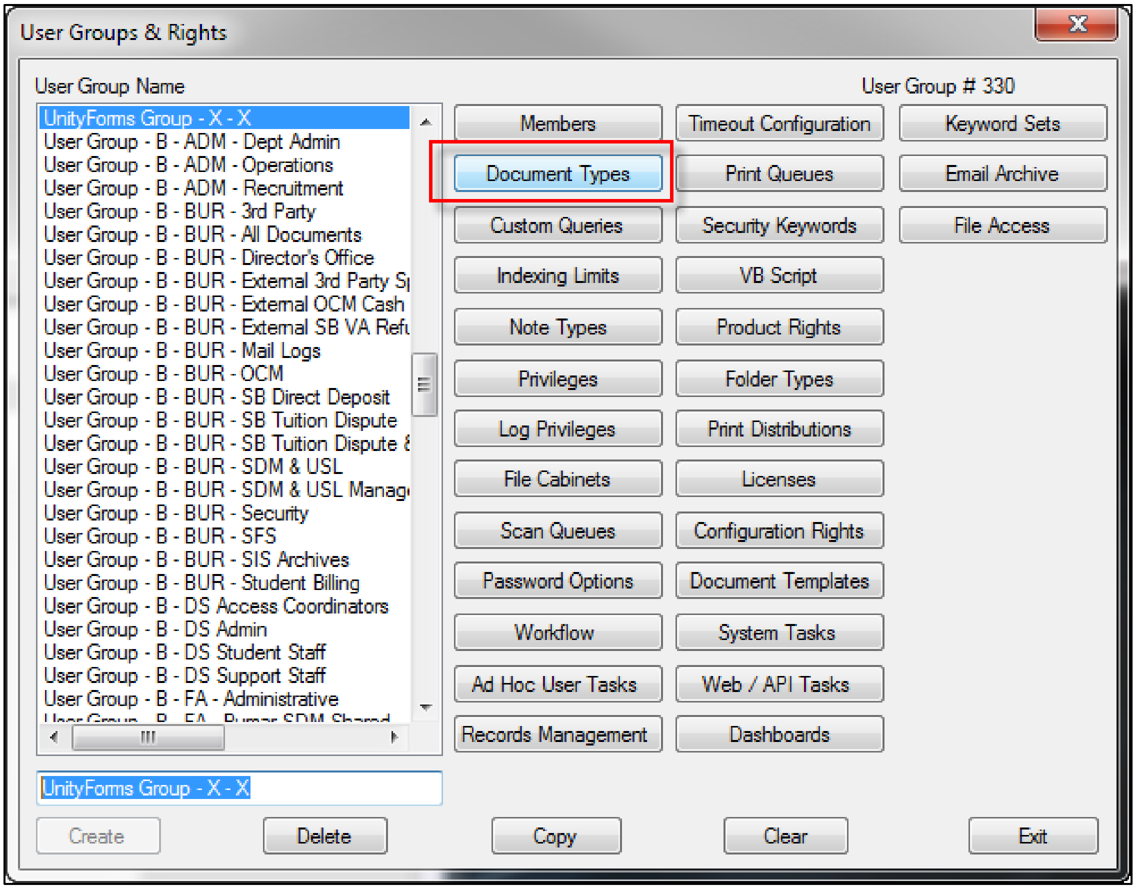
If you are using the above fixed credentials, please make sure that the *UnityForms Group - X - X* user group has access to the document type where the Unity form is configured. If using other fixed credentials, the same concept applies but will need to be adapted to grant the user account being used access to the appropriate document type.

Not all form developers will have the permissions necessary to perform this step. If you do not have access to User Groups/Rights in Configuration, contact your certified departmental administrator or UIS_DM_Support@cu.edu for assistance.

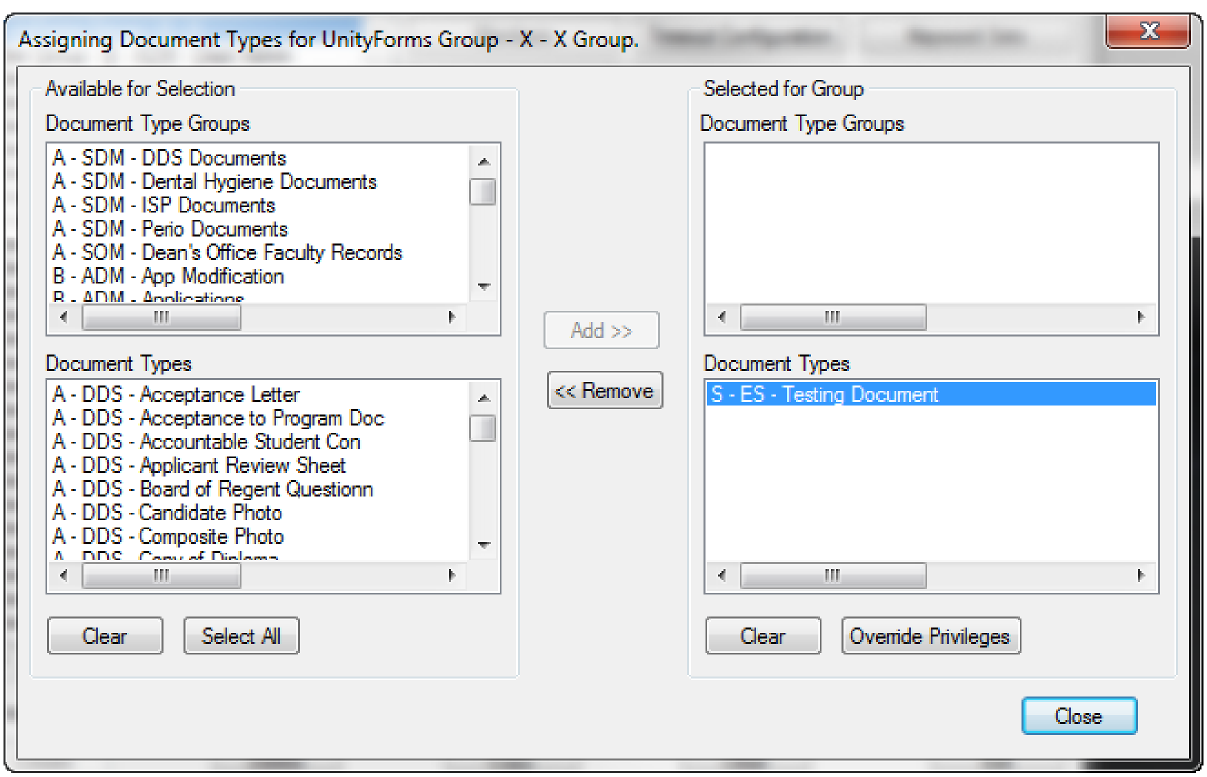
1. Log into the OnBase Configuration Client.
2. Select **Users** then **User Groups/Rights**.



3. Find the *UnityForms Group - X - X* group and select **Document Types**.



4. Add the appropriate document type to the group by finding it in the “Available” list and moving it to the “Selected” list using the **Add** button or double clicking.

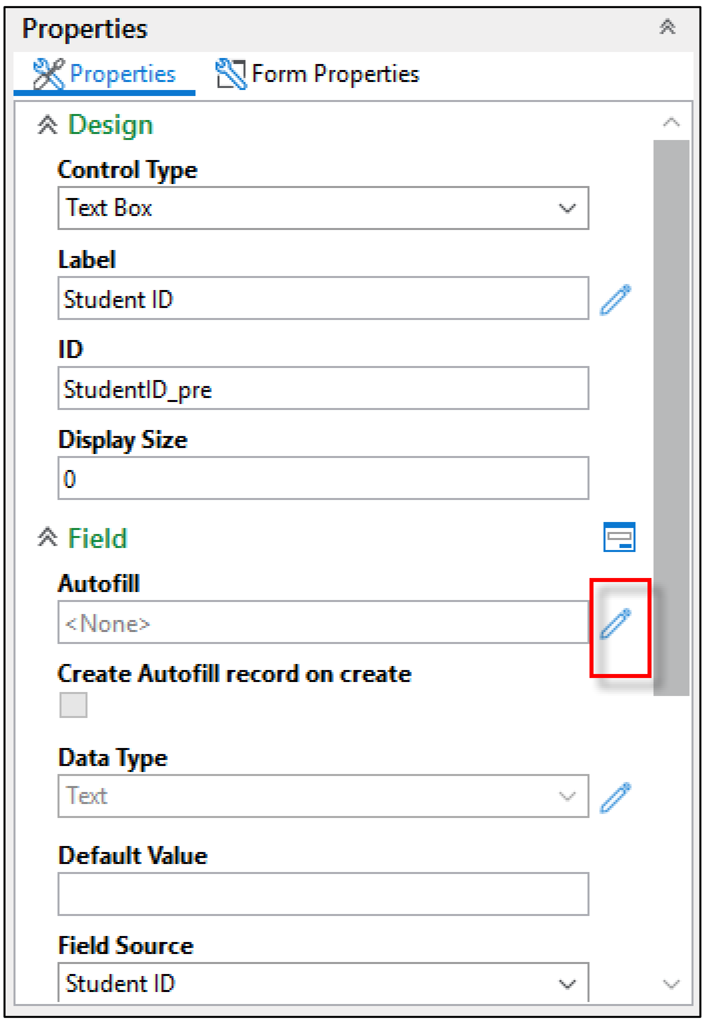


NOTE: If you are assigning form creation privileges to specific user groups (default is to allow any users with access to the document type and create privileges the ability to submit forms) through Form Visibility in the form designer, you will need to add this user group there as well.

Adding an Auto-fill/Script to your Unity Form

Adding an auto-fill to your form will allow for the First Name, Middle Name, Last Name and Date of Birth values to fill based on the Student ID or Employee ID.

1. Select the triggering field (either Student ID or Employee ID). Under the “Field” section in the field’s properties, click the **Edit** button next to the “Autofill” box.



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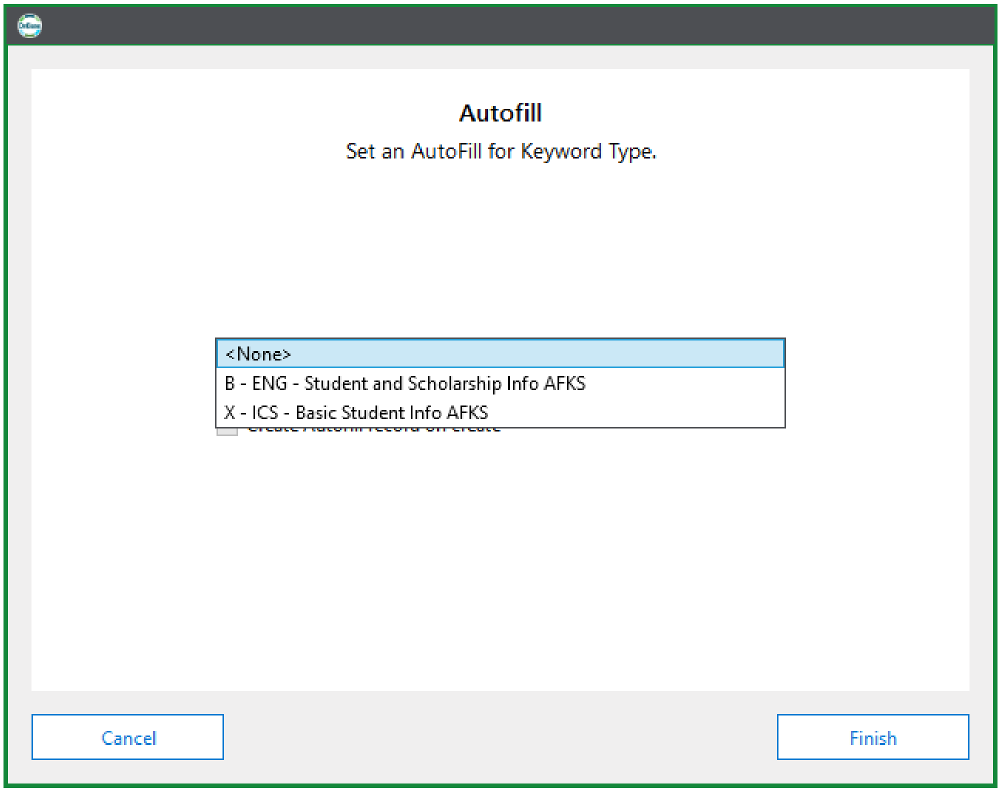
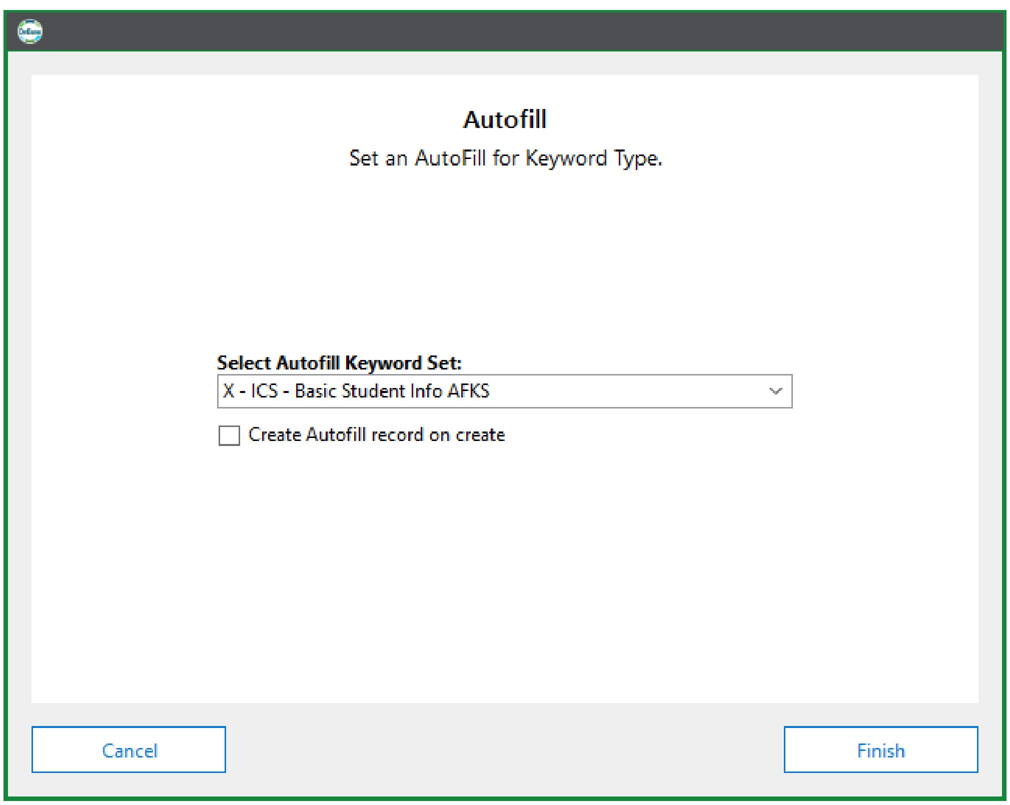
2. Select the appropriate **Autofill Keyword Set** from the dropdown menu.



3. Leave the **Create Autofill record on create** box unchecked.



4. Click **Finish**.

Other information beyond what can be populated using AFKS is [available through Unity scripts].

Testing

You will need to test this Unity Form to make sure it can be submitted and processed correctly. Enter the URL in a browser, fill out the form, and submit it.

NOTE: All of the Unity Forms URIs can be accessed on campus networks. Only the Production Unity Forms URI can be accessed off campus. For testing form URLs in non-production, you will need to be on a campus network or VPN.

Troubleshooting

Prior to the form loading:

Error Message	Resolution
Oops! We're not sure what went wrong, but we were unable to find your student/employee ID.	This message is generated by the Portal when it is unable to find the Student ID/Employee ID for the user (after they have authenticated into the Portal). Contact your campus OIT for assistance with verifying or updating the mapping between the campus credentials used to log in to the portal and the user's employee/student ID.
The form you requested has not been configured in this environment.	This message is generated by the Portal when it is unable to find configuration settings for the form. This would usually be if: • the URL is copied/entered incorrectly or incompletely • the environment has been refreshed • the portal integration was not configured for the environment

After the form has loaded:

Error Message	Resolution
The URL is invalid	Verify that the token used for the integration setup is correct and has not been changed. Verify that the correct field is assigned to the integration in the form designer integration settings.

Decommissioning Forms Shared by URL

Please refer to the Unity Form – Sharing for Public Use (Basic) guide for details.