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

8/1/2019
# Table of Contents

Background ..................................................................................................................... 3  
Prerequisites .................................................................................................................... 3  
Unity Form Integrations: Pre-filling keywords from the PeopleSoft portal ............ 3  
Adding an Auto-fill to your Unity Form ....................................................................... 14  
Creating the URL ........................................................................................................... 16  
In the OnBase Configuration Client .............................................................................. 20  
Testing ............................................................................................................................ 22
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. Below are the steps to setup that external use case.

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 Integrations: Pre-filling keywords from the PeopleSoft portal
Once you have created the Unity Form, you can create the “Integrations” for the form that will allow certain keyword values to be filled in by the PeopleSoft portal (or any other Identity management system that can authenticate users and process JavaScript code).

Please keep in mind that you will need to create 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.

Additionally, at this time, you will only be able to pull in one of the following fields for pre-population from portal data:
   a. Employee ID
   b. Student ID

To automatically fill the name and DOB data based on the Employee ID or Student ID, you will need to add an auto-fill to the form.
We *strongly recommend* using the following naming convention on the form fields so that the portal teams will have consistent coding to implement. You can change the form field names without modifying anything else of the form.

EmployeeID_pre  
StudentID_pre

This is configured as the **ID** for the field element in the Properties panel:

![Properties panel](image)

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

![Read-Only](image)

If any value that is being pre-filled on the form exceeds the maximum character length for the form field/keyword type, this will cause the integration to fail.

Please keep in mind that each portal link will have to be hand crafted/coded by the portal team so it is important to get this correct up front. Additionally, you will need to build the integration in all environments (DEV, TST, STG, and PRD) for the portal team.

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.
6. If an integration already exists, select it from the list at the left.

7. If the integration does not already exist, 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.

8. 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.
9. Next to your form in the list of Integrated Templates, click the Configure Fields button.
10. Select the field (Student ID or Employee ID) 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.
11. Click **OK** on the Form Fields dialog, then click **Save** in the Integrations dialog.

12. Open the **Integrations** window again from the menu, as you did to start the process.
13. Click the **Copy Token** button to copy the token. Paste the token in another place, as you will need to give it to the portal team.
14. Click **Save**.

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

A share form dialog will appear and include a new “Integration” field.
16. Fill out the form as described below but also check the **Use Integration** box and select the integration from the drop-down menu.
Provide the information below to your campus portal team by emailing portalhelp@cu.edu. You can use the following example as a template.

<table>
<thead>
<tr>
<th>Information Needed by Portal Team</th>
<th>Example Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requesting Campus</td>
<td>CUBLD</td>
</tr>
<tr>
<td>Requesting Office</td>
<td>UCB Bursar</td>
</tr>
<tr>
<td>Form Name in Portal &amp; Description</td>
<td>Change of Record Adjustment Request/Detail account adjustments to a student bill due to retroactive enrollment change.</td>
</tr>
</tbody>
</table>

**Share URL (DEV, TST, STG, PRD)**

- **DEV**
  - https://dm-devunityform.dev.cu.edu/UnityForms/UnityForm.aspx?d1=AUycsuCeokNPI3hyIzByKCPX3IrBfnqurfNd2fy2z0LgKwu5I4PDHj8UZ1D3Vbguceu1qee0oqw019vxxH3SvKzhkfKwGJnX4jikb7xU30PuoK10utoBnOyxTNSijBAJdRaeBNvM3VwM4RFNKV6Jp4H7KvXleHui5BYrLdUPT9v95RpxoCdoHAIyCsd71tPWFgQ8%2fX5LcE1cGew%3d%3d

- **TST**
  - https://dm-tstunityform.qa.cu.edu/UnityForms/UnityForm.aspx?d1=AYQkJCGGJL%2fsmR30cYKwrrZtd1M9p4ACArqU4D571hAhUII1uXMoYVRqS5btzodU77dhHzMaDE3iUXsivSKxKk1zMfsFNER6en62of2y10kwP0YWn56Hecl8U1h7yE9nDLciiOA%2brzhCexxRNC8seAE0atpif%2bQyLb96kHRs5g8vGyXVvZKhKRGhEZYuCTkC%2fKID%2bXE5laxaaxCfg%2bshyqGbca4KVCmL1WyPwIXifY62y2:jXIk8bD20roWcw%3d%3d

- **STG**
  - https://dm-stgunityform.qa.cu.edu/UnityForms/UnityForm.aspx?d1=AdlwITtBwysts%2b7HCxjJiJiJiD2QvmXT8I7kIUEwly3wpCbgXM27jH7b8x05yKxmy1w30PXpiv%2bFsdVS54REy1Y0ikm8tpHxAyP%2bd3nqpoERgssitterqZJGRIRL2f97DsMzd1CAU78EF2fzWzEGSxcHPrxQzFq4t6STIDM390j3xkxjwslFbJ11%2bF8xUhm5f35YBAQY2U3j0qao1exzTiA2z1xqVQKpdeuw1LUA8Cdc61wFmd88DApfew5aSxejnQ%3d%3d

- **PRD**
  - https://dm-unityform.prod.cu.edu/UnityForms/UnityForm.aspx?d1=AQwqIfeqAFGanNyXzu%2bO3dRFYyExfBm4cYS8nnefic1SHNJ3J1hF6PbMgp4yUfzkf1FB3k73gnBN9rTiyEwa1WQocCdV1IP9nsCabcD0k6ZP%2bYk%2bJ3f2bqF3J484tmUNeWvGvG0IXaczp6segauSogndL4%2bpmmnXHrmB61IRqcJAOvYbb3rXsGbmTPF2f2v1tveMvfmLBxvTME7kvX910hpxzIztLDbp221S11ItFS40M6xGbLoExu41ALxkGgQ5tfQ%3d%3d

**Token (DEV, TST, STG, PRD)**

- **DEV**
  - pfGd]q*Eyjcwsez8qtgscz{sf+237huxbM?jZ7zJzbujs

- **TST**
  - pfGd]q*Eyjcwsez8qtgscz{sf+237huxbM?jZ7zJzbujs

- **STG**
  - pfGd]q*Eyjcwsez8qtgscz{sf+237huxbM?jZ7zJzbujs

- **PRD**
  - pfGd]q*Eyjcwsez8qtgscz{sf+237huxbM?jZ7zJzbujs

**Form Fields**

- StudentID

**Portal Type**

- myCUinfo

**Location in the Portal**

- Student Tab

**Intended Audience (Students or Staff)**

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

Adding an Auto-fill to your Unity Form

Adding an auto-fill to your form is fairly simple. This 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.
2. Select the appropriate **Autofill Keyword Set** from the dropdown menu.

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

**Creating the URL**

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.

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

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

3. Click the **Share Form** button on the Designer tab of the menu.
4. A new dialog will appear with a number of fields to complete.

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

<table>
<thead>
<tr>
<th>Environment</th>
<th>Server URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEV</td>
<td>dm-devunityform.dev.cu.edu/UnityForms</td>
</tr>
<tr>
<td>TST</td>
<td>dm-tstunityform.qa.cu.edu/UnityForms</td>
</tr>
<tr>
<td>STG</td>
<td>dm-stgunityform.qa.cu.edu/UnityForms</td>
</tr>
<tr>
<td>PRD</td>
<td>dm-unityform.prod.cu.edu/UnityForms</td>
</tr>
</tbody>
</table>

6. The **Data Source** field does not need to be filled out as the Web server will handle this element.
7. Check the **Use Fixed Credentials** box and type in these credentials. These credentials will be used to log into an OnBase account when the shared URL is used to submit the form, so that users such as students and parents do not need to authenticate to access the form.

<table>
<thead>
<tr>
<th>User Name</th>
<th>S_UNITYFORMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td>ABCRT12394HHTS</td>
</tr>
</tbody>
</table>

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

You may choose to use other credentials for your Unity Forms. If you do so, please make sure that the user account has access to the document type that the Unity form is configured on, with permission to create documents in that document type.

Alternatively, if the user should be required to provide credentials for an OnBase account to access the form, do not check the box and leave the User Name and Password fields blank.

8. 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.

   ![URL](https://www.cusys.edu/EP/EPPRODSHAREDSingularity/thankyou.html)

9. In most cases, the **Embed Form** options are not used.
10. This is what the “Share Form” should look like when completed.

11. 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**.
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.
Testing
You will want to test this Unity Form to make sure it can be processed correctly. Enter the URL in a browser, fill out the form, and submit it.

NOTE: Only the Production Unity Forms URI can be accessed off campus. All of the Unity Forms URIs can be accessed on campus networks.