



# 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 <u>"basic" URL</u> 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 <u>add an auto-fill keyword set and/or Unity</u> <u>scripts to the form</u>.

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 <u>OnBase Certified Department Administrators</u> 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 <u>Unity Forms: Introduction</u> (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:

Properties	*
X Properties 📉 Form Properties	
	^
Control Type	
Text Box 🗸	
Label	
Student ID	1
ID	1
StudentID_pre	
Display Size	•

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.

Read-Only ✓	

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.

٢												
File Create		me D Theme Designer	Publish	Save Draft	Add Page	Custom Actions	(Solution) Test Drive	Form Visibility	C Share Form	(A) Integrations	Manage	र्थेे Import िर्के Export
	Manag	je			Temp	ate				Share	Tra	nslate

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.

	B - FA - Dependency Verification Form Odd Template: 269 , Revision : 11	Configure Fields 🗸 🧹
Token: 🗤 🕹 and the state of t		
Same and a second second	Save	Cancel

- 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.

9		Integrations	- 🗆	×
Integrations	+	Available Templates	3	~
B - FA - Student ID from Portal		Find Templates	2	¢
S - ES - Pull Empl ID from Portal				
X - X - Pull SID from Portal				

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.

9	Integrations		- 0	×
Integrations +	Available Templates			*
B - FA - Student ID from Portal	Find Templates			×
B - REG - Pull Empl ID from Portal D - BUR - Student ID from Portal D - FA - Student ID from Portal S - ES - Pull Empl ID from Portal X - X - Pull SID from Portal	B - BUR - Late and Finance REQUEST Template: 308, Revision : 55 B - BUR - Late and Finance SPECIAL Template: 506, Revision : 1 B - BUR - Nonresident Senior Tuition A Template: 258, Revision : 35 B - BUR - SB Contact Entry Form Template: 375, Revision : 8 B - BUR - Tuition Accommodation Form Template: 502, Revision : 1			, in the second
	Integrated Templates Find Templates			*
	<b>B - REG - BAM</b> Template: 486 , Revision : 6	[	Configure Fields	Î
	B - REG - Change of Major Template: 531 , Revision : 6		Configure Fields	
	B - REG - Change of Record Template: 374, Revision : 31	[	Configure Fields	]
	B - REG - COF Waiver Form Template: 328 , Revision : 10		Configure Fields	]
	B - REG - Course Reservation Template: 335 , Revision : 20		Configure Fields	_
Token: 🗤 🗇 🖓 🖓 🖉 🖓 Token: 🖓 🔁				
Regenerate Token		Save	Cancel	



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## Adding Fields to the Integration

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

	Integrations	- 🗆
ntegrations +	Available Templates	3
B - ADM - Pull Empl ID from Portal	example	>
B - EA - Student ID from TDS B - FA - Student ID from Portal	S - UIS - Example - Form for WorkView Reporting Template: 771 , Revision: 3	
B - REG - Form Source	S - UIS - Example - SMS Notification Template: 859 , Revision: 3	
B - REG - Pull Empl ID and Student ID from Port		
B - REG - Pull Empl ID from Portal		
C - BUR - Student ID from Portal		
C - HR - Employee Separation		
C - HR - Separation		
D - BUR - Student ID from Portal		
D - FA - Student ID from Portal	▼ ▲	
D - REG - Student ID from Portal	Integrated Templates	
S - ES - Pull Empl ID from Portal	example	>
S - HR - Performance Rating from Portal	S - UIS - Example - Multiple Regex Validation	Configure Fields
X - X - Pull CS and HR Emplid from Portal	Template: 1511 , Revision: 2	
X - X - Pull Empl ID from Portal		
X - X - Pull SID from Portal		

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.





- 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.



	B - FA - Dependency Verification Form Template: 269, Revision : 11	Odd (	Configure Fields
Token: 🗤 a gla astrody a to a shift 👘 🕥			
		Save	Cancel
1			1 11

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 <u>"basic" URL</u> <u>configuration</u> as it includes a new "Integration" field.

9	Share Form		– 🗆 ×
Server Information			
✓ Use Encrypted Connection Server:			
Data Source:			
Authentication			
Use Fixed Credentials 📀			
User Name:			
Password:			
Options			
Target URL:			
Embed Form			
1024 x 768 320x240	640x480	800x600	1024x768
Use Integration			~
Result			
<missing information="" required="" server=""></missing>			-
			Close

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			
	<sup>11</sup> University of Colorado			

#### 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 reconfiguration 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.

Share Form	- 🗆 ×
Server Information	
✓ Use Encrypted Connection Server:	
dm-devunityform.dev.cu.edu/UnityForms	
Data Source:	
Authentication	
✓ Use Fixed Credentials ② User Name:	
S_UNITYFORMS	
Password:	
ABCRT12394HHTS	
Options	
Target URL:	
https://www.cusys.edu/EP/EPPRODSHARED/Singularity/thankyou.html	
Embed Form	
	1024x768
Use Integration X - X - Pull SID from Portal	~
Result	
%2fj1F5%2bJIJGFO5hf7QvN4suh12wI7ZHERuQhCNWwxQ7TUNhDQ7bRYeADUA2fX6UHW	/aka6CA%3d%3d 🗐
Γ	Close

- 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 <u>portalhelp@cu.edu</u>. 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)	<ul> <li><u>DEV</u>: https://dm- devunityform.dev.cu.edu/UnityForms/UnityForm.aspx?d1=AUy csuCoekNPI3hyIzBySDFHR3IrfCntCuQwfvdXr%2fulBf2yyzrpbV1Kb RVKHBJHNrbe%2fiaBUSeKmsdwvN03TIRtcnQ%2fz0LgKwh5IlPDHj8UZ lDJVbgucEulQeOoqw0i9VxxHJBSKzhklRwGJNx4j</li> <li><u>TST</u>: https://dm- tstunityform.qa.cu.edu/UnityForms/UnityForm.aspx? d1=AUycsuCoekNPI3hyIzBySDFHR3IrfCntCuQwfvdXr%2fulBf2yyzr pbV1KbRVKHBJHNrbe%2fiaBUSeKmsdwvN03TIRtcnQ%2fz0LgKwh5IlP DHj8UZlDJVbgucEulQeOoqw0i9VxxHJBSKzhklRwGJNx4j</li> <li><u>STG</u>: https://dm- stgunityform.qa.cu.edu/UnityForms/UnityForm.aspx? d1=AUycsuCoekNPI3hyIzBySDFHR3IrfCntCuQwfvdXr%2fulBf2yyzr pbV1KbRVKHBJHNrbe%2fiaBUSeKmsdwvN03TIRtcnQ%2fz0LgKwh5IlP DHj8UZlDJVbgucEulQeOoqw0i9VxxHJBSKzhklRwGJNx4j</li> <li><u>PRD</u>: https://dm- unityform.prod.cu.edu/UnityForms/UnityForm.aspx? d1=AUycsuCoekNPI3hyIzBySDFHR3IrfCntCuQwfvdXr%2fulBf2yyzr pbV1KbRVKHBJHNrbe%2fiaBUSeKmsdwvN03TIRtcnQ%2fz0LgKwh5IlP DHj8UZlDJVbgucEulQeOoqw0i9VxxHJBSKzhklRwGJNx4j</li> <li><u>PRD</u>: https://dm- unityform.prod.cu.edu/UnityForms/UnityForm.aspx? d1=AUycsuCoekNPI3hyIzBySDFHR3IrfCntCuQwfvdXr%2fulBf2yyzr pbV1KbRVKHBJHNrbe%2fiaBUSeKmsdwvN03TIRtcnQ%2fz0LgKwh5IlP DHj8UZlDJVbgucEulQeOqw0i9VxxHJBSKzhklRwGJNx4j</li> </ul>
Token (DEV, TST, STG, PRD)	<ul> <li>DEV: pfGd]q*Ejycasdfas8qtgszc{sf+237huxbM?jZ7zJzbujs</li> <li>TST: pfGd]q*Ejycasdfas8qtgszc{sf+237huxbM?jZ7zJzbujs</li> <li>STG: pfGd]q*Ejycasdfas8qtgszc{sf+237huxbM?jZ7zJzbujs</li> <li>PRD: pfGd]q*Ejycasdfas8qtgszc{sf+237huxbM?jZ7zJzbujs</li> </ul>
Form Field(s)	StudentID_pre
Intended Audience	Students
(Students or Staff)	
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 <u>certified departmental administrator</u> or <u>UIS\_DM\_Support@cu.edu</u> for assistance.

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

ſ	😳 OnBase Configuration (dmodev) Test System - Not For Production Use												
	Disk Mgmt	Keyword	Document	Queries	Import	Printing	Users	Org Chart	Workflow	Report	Utils	Help	
								User Groups /	Rights				
							1000	User Names /	Passwords				
į								User / Group	Import				

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



ser Group Name			User	Group # 330
JnityForms Group - X - X Jser Group - B - ADM - Dept Admin	^	Members	Timeout Configuration	Keyword Sets
Jser Group - B - ADM - Dept Admin Jser Group - B - ADM - Operations Jser Group - B - ADM - Recruitment	ľ	Document Types	Print Queues	Email Archive
Jser Group - B - BUR - 3rd Party Jser Group - B - BUR - All Documents	1	Custom Queries	Security Keywords	File Access
Jser Group - B - BUR - Director's Office Jser Group - B - BUR - External 3rd Party Sj		Indexing Limits	VB Script	
Jser Group - B - BUR - External OCM Cash Jser Group - B - BUR - External SB VA Refu Jser Group - B - BUR - Mail Logs		Note Types	Product Rights	
Les Caula D. DUD. OCM	=	Privileges	Folder Types	
User Group - B - BUR - SB Tuition Dispute User Group - B - BUR - SB Tuition Dispute User Group - B - BUR - SDM & USL User Group - B - BUR - SDM & USL Manage User Group - B - BUR - SIS Archives User Group - B - BUR - SIS Archives User Group - B - BUR - Student Billing User Group - B - DS Access Coordinators User Group - B - DS Admin User Group - B - DS Atministrative User Group - B - DS Support Staff User Group - B - SS Support Staff User Group - B - FA - Administrative User Group - B - FA - Administrative		Log Privileges	Print Distributions	
	,	File Cabinets	Licenses	
		Scan Queues	Configuration Rights	
		Password Options	Document Templates	
		Workflow	System Tasks	
	_	Ad Hoc User Tasks	Web / API Tasks	
		Records Management	Dashboards	
JnityForms Group - X - X	٦			

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.

Available for Selection		Selected for Group	
A - SDM - Dental Hygiene Documents A - SDM - ISP Documents A - SDM - Perio Documents A - SOM - Dean's Office Faculty Records B - ADM - App Modification R - ADM - App Modification Comment Types A - DDS - Acceptance Letter A - DDS - Acceptance Letter A - DDS - Acceptance to Program Doc A - DDS - Accountable Student Con	Add >> <	Document Type Groups          Image: style s	4
A - DDS - Applicant Review Sheet A - DDS - Board of Regent Questionn A - DDS - Candidate Photo A - DDS - Composite Photo A - DDS - Composite Photo Clear Select All	~	Clear     Override Privileges	4
			Close

**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.

 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.

Properties	*
X Properties	
☆ Design	^
Control Type	
Text Box $\checkmark$	
Label	
Student ID	1
ID	
StudentID_pre	
Display Size	
0	
☆ Field	
Autofill	_
<none></none>	0
Create Autofill record on create	
Data Type	
Text ~	1
Default Value	
Field Source	
Student ID V	~



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



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

<b>e</b>		
А	utofill	
Set an AutoFil	ll for Keyword Type.	
Select Autofill Keyword Set:		
X - ICS - Basic Student Info AFK	S ~	
Create Autofill record on cre	ate	
Cancel	Finish	



#### 4. Click Finish.

Other information beyond what can be populated using AFKS is <u>available through</u> <u>Unity scripts</u>.

## 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.	<ul> <li>This message is generated by the Portal when it is unable to find configuration settings for the form. This would usually be if: <ul> <li>the URL is copied/entered incorrectly or incompletely</li> <li>the environment has been refreshed</li> <li>the portal integration was not configured for the environment</li> </ul> </li> </ul>



#### 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.

