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OnBase Guide - Unity Form - Sharing for Public Use (Basic URL)

Goal: To share a Unity Form such that department, campus, and internet users can access and fill out the form from a URL without needing to authenticate to an OnBase account.

Complexity Level: Departmental Administrative Users, Departmental Unity Form Developers

7/7/2023

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Background

Unity forms can be submitted 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 a URL for this use case.

If you create a new URL once one has been created for the form template, the original URL will continue to work with the settings it was created with.

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.

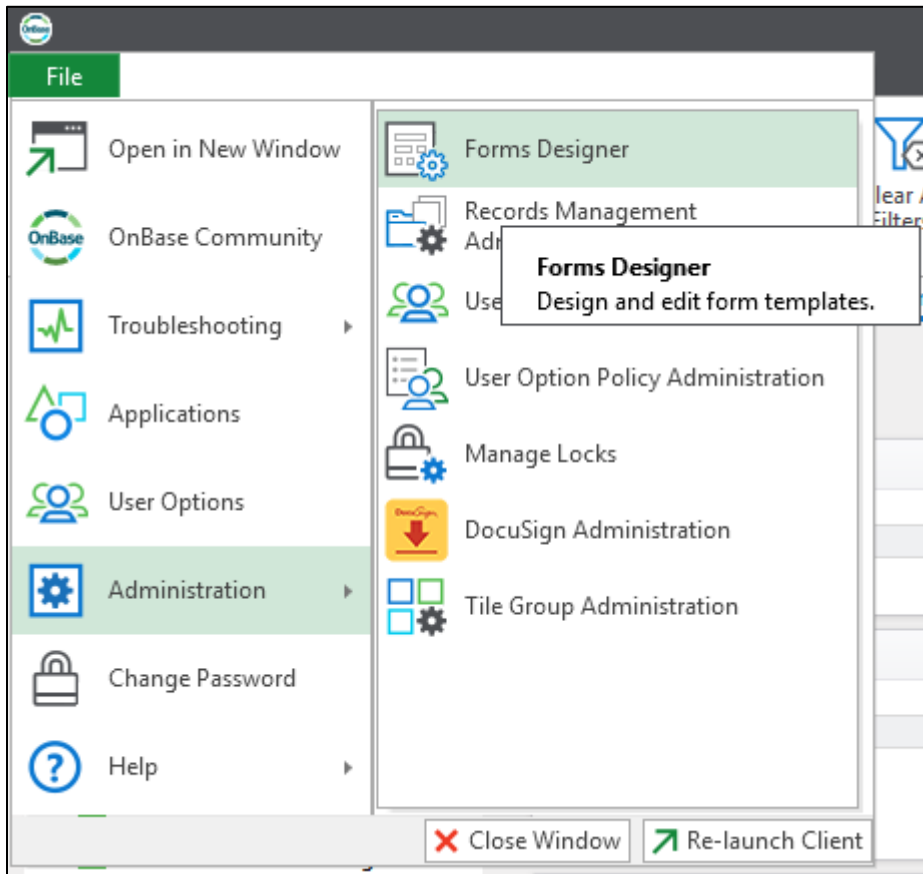
The document type used to store the Unity form must already be created in Configuration, with any desired keyword types assigned to the document type, prior to creating the Unity form template.

The Unity form template must be created, tested, published and ready for public use before the URL is 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.

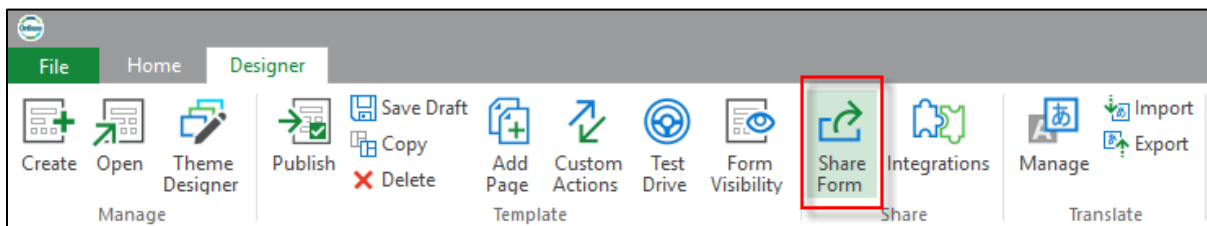
In the OnBase Unity Client

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.

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

6. Leave the **Data Source** blank.

7. Enter credentials. There are three options at this point:

- 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 such as students and parents (or anyone else without an OnBase account) do not need to authenticate to access the form.

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.

- 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. Users will be prompted to log in and will need to be in user groups with sufficient privileges to submit the form.

NOTE: If you use the Unity Form-specific URLs above without fixed credentials, users will be presented with the default OnBase login page. They will need to know their OnBase login credentials and be set up to allow standard authentication.

If you want users to use their campus credentials to log in to OnBase to access the form by URL, use these values instead:

DEV	dm-dev.dev.cu.edu/AppNet
TST	dm-tst.qa.cu.edu/AppNet
STG	dm-stg.qa.cu.edu/AppNet
PRD	dm.prod.cu.edu/AppNet

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.

<https://www.cusys.edu/EP/EPPRODSHARED/Singularity/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.

The screenshot shows a window titled "Share Form" with the following sections:

- Server Information**
 - Use Encrypted Connection
 - Server: dm-devunityform.dev.cu.edu/UnityForms
 - Data Source: (empty field)
- Authentication**
 - Use Fixed Credentials
 - User Name: S_UNITYFORMS
 - Password: ABCRT12394HHTS
- Options**
 - Target URL: https://www.cusys.edu/EP/EPPRODSHARED/Singularity/thankyou.html
 - Embed Form
 - 1024 x 768
 - 320x240
 - 640x480
 - 800x600
 - 1024x768
- Result**
 - URL: https://dm-devunityform.dev.cu.edu/UnityForms/UnityForm.aspx?d1=AU2%2fO6BMWplNMMqw7w1fal5 (with a copy icon)
 - Close button

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**.

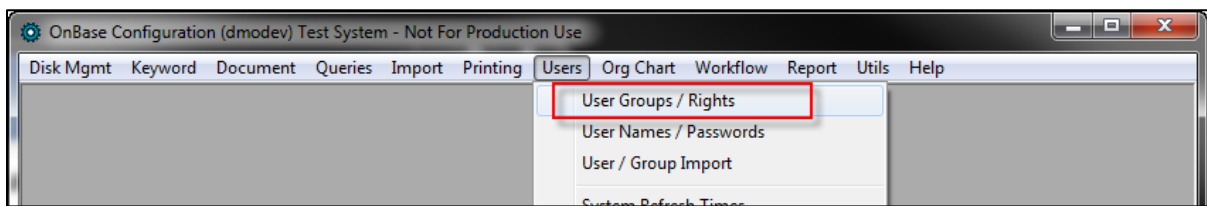
In the OnBase Configuration Client

If you are using the above 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.

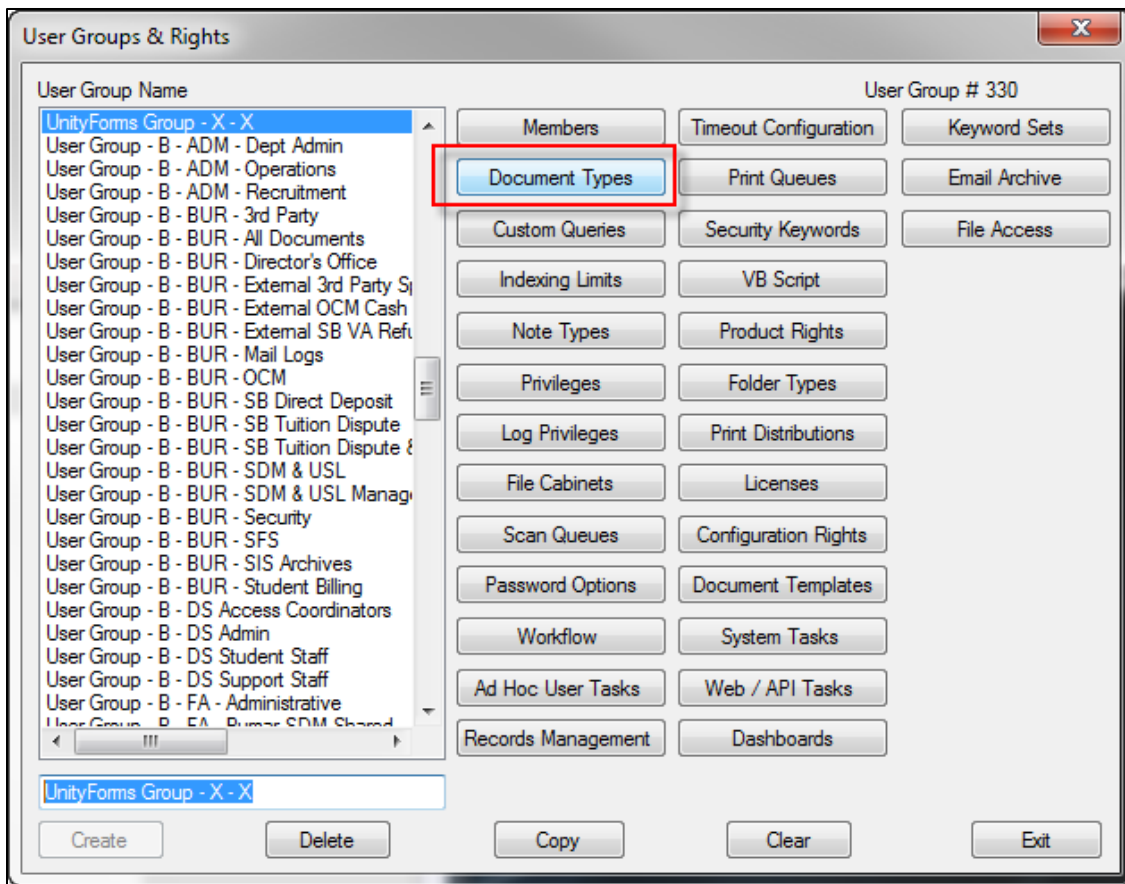
If not using fixed credentials, the users who will submit the form will need to be in a user group with access to the document type for the form.

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.

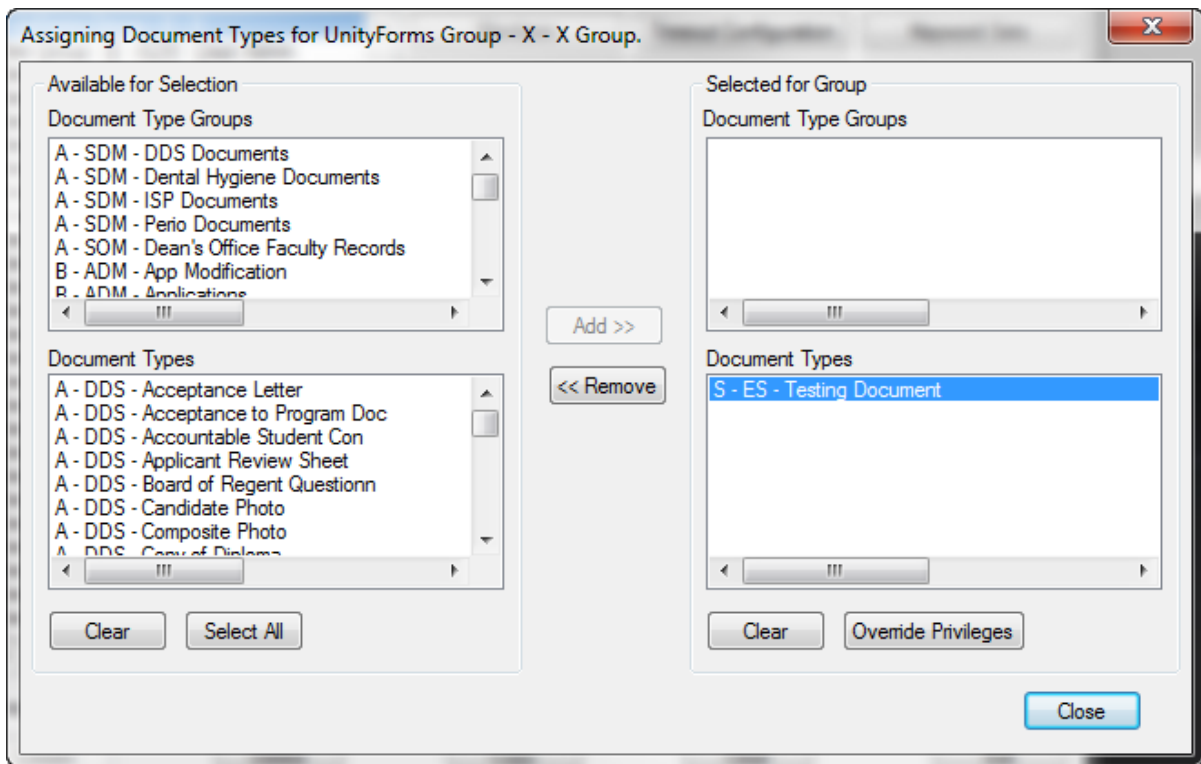
1. Log into the OnBase Configuration Client.
2. Select **Users** then **User Groups/Rights**.



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.

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.

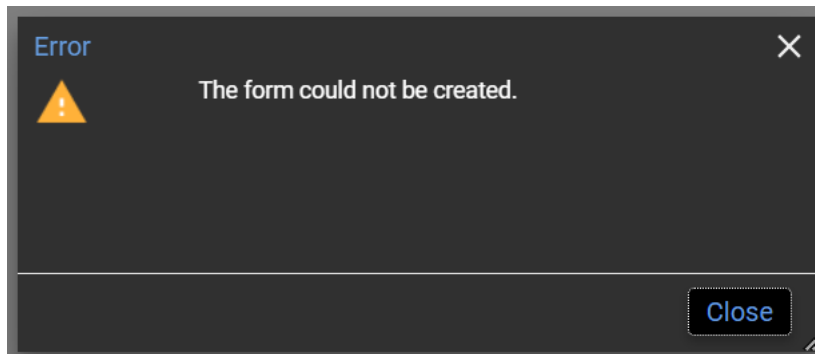
Decommissioning Forms Shared by URL

There is not any built-in functionality for managing URLs once they are created, and therefore not a default way to deactivate a URL.

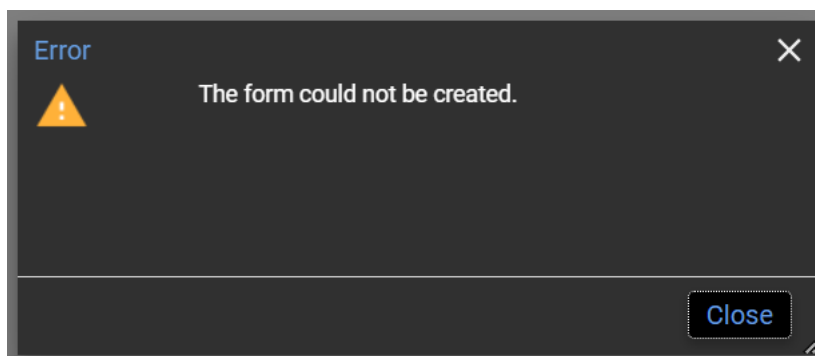
Even if links are removed from public web pages, users may have bookmarked the URL or may reference old materials to continue accessing the form.

There are a few options if you no longer want a URL to be used.

1. Remove the *UnityForms Group - X - X* user group from the document type for the form template.
 - a. This will prevent all public form submission, but users may still be able to submit forms through the OnBase Unity/web clients.
 - b. The group can be added to the document type in the future and the URL will work again.
 - c. Users will see an error message if they attempt to access the form using the URL.



2. Delete the form template.
 - a. This will prevent all form submission going forward.
 - b. Deleted templates can be restored if necessary and the URL will work again.
 - c. Users will see an error message if they attempt to access the form using the URL.



3. **Recommended:** Replace the contents of the form template with a message.
 - a. If the submit button is removed, this will prevent all form submission going forward.
 - b. Prior revisions of the form can be restored if necessary and the URL will direct to the most recent revision of the form.
 - c. Users will see your custom text, which can redirect them to more information.

Demo Form

This form is no longer available!

Please go to [this resource](#) for more information or contact person@cu.edu.

