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

8/1/2019
# Table of Contents

Background .................................................................................................................. 3
Prerequisites .................................................................................................................. 3
In the OnBase Unity Client ......................................................................................... 3
In the OnBase Configuration Client ............................................................................. 8
Testing ......................................................................................................................... 10
**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.

**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.

<table>
<thead>
<tr>
<th>Environment</th>
<th>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.


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 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](mailto:uis_dm_support@cu.edu) or [UIS_DM_Support@cu.edu](mailto: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.