OnBase Guide - Unity Script - Update Email Address (ICS/HCM)

**Goal:** To use a script in Workflow or on a Unity form to retrieve the email addresses from Campus Solutions or HCM.

**Complexity Level:** Departmental Workflow Developers, Departmental Unity Form Developers

7/29/2021
# Table of Contents

Background .................................................................................................................................................. 3
Email Address Types ..................................................................................................................................... 3
  Campus Solutions ....................................................................................................................................... 3
  HCM ......................................................................................................................................................... 4
Prerequisites .................................................................................................................................................. 4
Using the Workflow Scripts ....................................................................................................................... 4
  Using the ICS Workflow Script .................................................................................................................. 4
    Set Property Values Needed for Script ..................................................................................................... 5
    Run the Script ......................................................................................................................................... 10
    Use the Script Results ............................................................................................................................. 10
  Using the HCM Workflow Script .............................................................................................................. 11
    Set Property Values Needed for Script ..................................................................................................... 11
    Run the Script ......................................................................................................................................... 16
    Use the Script Results ............................................................................................................................. 16
  Troubleshooting Scripts in Workflow ...................................................................................................... 17
Using the Unity Form Scripts .................................................................................................................... 18
  Configuring Form Fields ............................................................................................................................ 18
  Troubleshooting Form Scripts .................................................................................................................. 19
  Custom Action to Execute Script ............................................................................................................... 19
**Background**

Scripts are available (one for Workflow, one for Unity forms) to retrieve the email address for a student from Campus Solutions.

It is a best practice to check for the existence of all input values before running the script (ex. if you intend to use the Employee ID keyword as an input to get HCM addresses, check that the Employee ID keyword has a value before attempting the script).

When using email addresses to send notifications, it is also a good idea to validate the email address before attempting the notification send (to ensure that whatever keyword/property value being used as a recipient is a valid email address). More information about validating email addresses is available for workflow in the [Commonly Used Expressions](#) guide and for Unity forms in [Validating Field Values with RegEx](#).

**Email Address Types**

You will need to specify which email type to retrieve from either source. The available options are:

**Campus Solutions**

<table>
<thead>
<tr>
<th>Address Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BLD</td>
<td>Boulder</td>
</tr>
<tr>
<td>CONT</td>
<td>Continuing Ed</td>
</tr>
<tr>
<td>CUCS</td>
<td>CU Student Preferred</td>
</tr>
<tr>
<td>DENH</td>
<td>UC Denver</td>
</tr>
<tr>
<td>FAST</td>
<td>Faculty Staff</td>
</tr>
<tr>
<td>ISIR</td>
<td>Financial Aid ISIR</td>
</tr>
<tr>
<td>PRCU</td>
<td>Pre CU Enrollment</td>
</tr>
<tr>
<td>PRIR</td>
<td>Parent ISIR</td>
</tr>
<tr>
<td>PRNT</td>
<td>Parent ISIR</td>
</tr>
<tr>
<td>PSCU</td>
<td>Post CU Enrollment</td>
</tr>
<tr>
<td>UCCS</td>
<td>UCCS</td>
</tr>
</tbody>
</table>


Information on inputs and outputs of all Unity scripts are available on the OnBase Unity Script Inputs and Outputs administrative reporting dashboard in the Configuration category.

**Prerequisites**

For Workflow:

You must have OnBase Studio installed and know how to configure a life cycle. Refer to the OnBase Client Guides for instructions on installation and to the Workflow MRG for more details as necessary. Contact UIS_DM_Support@cu.edu for assistance if needed.

For Unity Forms:

You must be a member of the Unity form developer user group and be familiar with creating form templates and configuring custom actions.

**Using the Workflow Scripts**

When using script in workflow, input values should be set and/or validated, then an action runs the script to retrieve output values. You can then use the output values with any of the actions/rules available for properties.

**Using the ICS Workflow Script**

This script takes a student ID and the email type you provide and outputs the appropriate email address to a property value, which you can then copy to a keyword value, or use in another manner.
Certain values are required for the script to retrieve the desired email address:

- Student ID (keyword value)
- UnityScriptResult (property)
- ScriptError (property)
- EmailAddressType (property)
- EmailKWToUpdate (property)

When setting any property values to run a script, be sure to note which property bag is being used and be consistent with this selection.

**Set Property Values Needed for Script**

Create an action and choose the **Set Multiple Property Values** action type.

Click **Add** at the bottom of the panel at the right side to add a new property value.

Enter the following values to set the **UnityScriptResult** property:

- Property Name: UnityScriptResult
- Constant Value: Initialized
Then click OK.

Click Add at the bottom of the panel at the right side to add a new property value and enter the following values to set the ScriptError property:

- Property Name: ScriptError
- Constant Value: [leave blank]
Then click **OK**.

Click **Add** at the bottom of the panel at the right side to add a new property value and enter the following values to set the **EmailAddressType** property:

- Property Name: EmailAddressType
- Constant Value: [enter desired “Field Value” from chart above]
Then click **OK**.

Click **Add** at the bottom of the panel at the right side to add a new property value and enter the following values to set the **EmailKWToUpdate** property:

- **Property Name**: EmailKWToUpdate
- **Constant Value**: Initialized
Then click **OK**. Overall, the Set Multiple Property Values action should look like this when complete:
Run the Script
Create a “Run Unity Script” action. Select “GEN – ICS – Update Email Address” from the list of available scripts. Check the box to Refresh item after script has executed.

When the script runs, it will update the EmailKWToUpdate property value with the student’s email address.

Use the Script Results
After the script runs, you can then copy the EmailKWToUpdate property value to whatever keyword you wish, or use it with a notification, or use it for anything else you can do with properties.

Use the “Set Keyword from Property Value” action type to copy the value to a keyword value.

The property value can also be used as a notification recipient.
NOTE: This requires the property to be stored as a Session property value, so be sure to configure the property accordingly if this is your intended use.

Using the HCM Workflow Script
This script uses the employee ID. If desired, you can also provide an email address type. When the script runs, the specified email address is set to a property value, which you can then copy to a keyword value, or use in another manner.

Certain values are required for the script to retrieve the desired email address:
- Employee ID (keyword value, or if no keyword value exists, the EmployeeID property value can be used instead)
- UnityScriptResult (property)
- ScriptError (property)
- EmailAddressType (property, optional input)
- EmailAddress (property, output)

If no email address type is specified, the output will be the person’s preferred email address.

When setting any property values to run a script, be sure to note which property bag is being used and be consistent with this selection.

Set Property Values Needed for Script
Create an action and choose the Set Multiple Property Values action type.
Click **Add** at the bottom of the panel at the right side to add a new property value.

Enter the following values to set the **EmailAddress** property:
- Property Name: EmailAddress
- Constant Value: [leave blank]

Click **Add** at the bottom of the panel at the right side to add a new property value and enter the following values to set the **EmailAddressType** property (optional):
- Property Name: EmailAddressType
- Constant Value: [enter desired “Field Value” from chart above]
Then click **OK**.

Click **Add** at the bottom of the panel at the right side to add a new property value and enter the following values to set the **UnityScriptResult** property:

- **Property Name**: UnityScriptResult
- **Constant Value**: [leave blank]
Then click **OK**.

Click **Add** at the bottom of the panel at the right side to add a new property value and enter the following values to set the **ScriptError** property:

- Property Name: ScriptError
- Constant Value: [leave blank]
Then click **OK**.

Then click **OK**. Overall, the Set Multiple Property Values action should look like this when complete:
Run the Script
Create a “Run Unity Script” action. Select “GEN – HCM – Update Email Address” from the list of available scripts. Check the box to Refresh item after script has executed.

When the script runs, it will update the EmailAddress property value with the person’s email address.

Use the Script Results
After the script runs, you can then copy the EmailAddress property value to whatever keyword you wish, or use it with a notification, or use it for anything else you can do with properties.

Use the “Set Keyword from Property Value” action type to copy the value to a keyword value.
The property value can also be used as a notification recipient.

NOTE: This requires the property to be stored as a Session property value, so be sure to configure the property accordingly if this is your intended use.

**Troubleshooting Scripts in Workflow**

If you encounter an issue, checking the values of the UnityScriptResult and ScriptError properties may provide helpful information for determining the cause of the issue.

While troubleshooting, it may be helpful to add a note or custom log entry to the document after the script is run in order to view the UnityScriptResult and ScriptError values.
Using the Unity Form Scripts

These form scripts do not directly update a keyword type but update a form field which may be mapped to a keyword type or stored as a non-keyword form field. The correct fields need to be configured, then a custom action runs the script.

Configuring Form Fields

Certain field IDs must be used for the email address scripts to work.

For the Campus Solutions script, you will need:

<table>
<thead>
<tr>
<th>Value</th>
<th>Field ID</th>
<th>Used as</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student ID</td>
<td>StudentID_pre</td>
<td>Input, required</td>
</tr>
<tr>
<td>Email Address</td>
<td>email_address</td>
<td>Output, required</td>
</tr>
<tr>
<td>Email Address Type</td>
<td>email_type</td>
<td>Input, required</td>
</tr>
</tbody>
</table>

The email address type field can be hidden. Set a value for the field (default value or set by custom action) for the field based on the email address types above.
For the HCM Script, you will need:

<table>
<thead>
<tr>
<th>Value</th>
<th>Field ID</th>
<th>Used as</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>EmployeeID_pre</td>
<td>Input, required</td>
</tr>
<tr>
<td>Email Address</td>
<td>email_addr</td>
<td>Output, required</td>
</tr>
</tbody>
</table>

The HCM script uses the employee’s preferred email address in HCM.

**Troubleshooting Form Scripts**

If you’d like to include error messages, you can add the following output fields (these are optional):

<table>
<thead>
<tr>
<th>Value</th>
<th>Field ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Error Message (all scripts)</td>
<td>error_message</td>
</tr>
<tr>
<td>Error Messages for the ICS email script only</td>
<td>error_message_GENUpdateEmailAddress</td>
</tr>
<tr>
<td>Error Messages for the HCM email script only</td>
<td>error_message_GENHCMGetEmailAddressUNITYFORM</td>
</tr>
</tbody>
</table>

**Custom Action to Execute Script**
A custom action is required in order to execute a Unity script. Create a custom action with the desired conditions, then add an action to execute the **GEN - ICS - Update Email Address [UNITY FORM]** or **GEN - HCM - Get Email Address [UNITY FORM]** script.

At a minimum, you should check for the Student ID and email address type field being populated if using the ICS script and the Employee ID field being populated if using the HCM script, but you may wish to add other conditions such as:

- Form is new (to prevent the script running every time the form is viewed after submission)
- Name fields being populated and valid, through whatever identity validation you are performing