OnBase Guide - Using Preferred Names

**Goal:** To use employees’ and students’ preferred names in Unity forms and workflow processing in OnBase

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

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Background
A preferred name is one that differs from someone’s legal name.

If students or employees would rather be referred to on campus by a nickname, professional name, anglicized name or name that better aligns with their gender identity, they can provide their preferred name which will be stored in ICS (for students) and/or HCM (for employees).

In order to respect their wishes to be addressed by a preferred name, this information (preferred first name) can be obtained for use in Unity forms and workflow notifications.

This is done using a Unity script that will query for a preferred first name associated with the employee and/or student IDs on the document. If no preferred first name is identified, the primary first name will be populated in the keyword instead.

Prerequisites
To use preferred names in workflow processing, you will need to use OnBase Studio and be familiar with workflow design and configuration.

For Unity forms, you will need to have the required user group privileges to configure forms in the Unity client.

The appropriate keyword types will need to be assigned to the document type, which requires use of OnBase Configuration and membership in the certified administrator user group.

Please reference other UIS guides for installation instructions and configuring each of the products. The Workflow and System Administration MRGs also provide further details. Contact UIS_DM_Support@cu.edu for assistance if needed.

Steps to Complete in Configuration
To use the preferred name for students, add the Student Preferred First Name keyword type to the appropriate document type(s).

To use the preferred name for employees, add the Employee Preferred First Name keyword type to the appropriate document type(s).

Both can be used on the same document type.

Using Preferred Names in Workflow
Create an action using the Run Unity Script action type, and select the **GEN - GEN - Get Preferred First Name** script.

In notifications, insert the applicable preferred name keyword types instead of the standard first name keyword type.

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**Using Preferred Names in Unity Forms**

Create a field on the form for the Employee and/or Student ID that will be used to identify the preferred name(s). The fields must have the following IDs for the script to work:

- StudentID_pre
- EmployeeID_pre

Create a field on the form for each preferred name keyword that is being used. The fields must have the following IDs for the script to work:

- StudentPreferredName
- EmployeePreferredName

You may wish to hide or not include the primary first name field(s) on the form in order to only display the preferred name(s).

Configure a custom action to run the **GEN - GEN - Get Preferred First Name [UNITY SCRIPT]** script.

The following is an example, but can be adapted to fit your process. If both employee and student name are included and you want to retrieve the preferred name for both, you may need to run the script twice to account for the timing of when each ID number is entered.
Testing the Solution

Item Generators can be configured to create documents (including forms, or other items) in the desired document types and with the desired keyword values. These let you test life cycles in a variety of ways and even specify keyword and property values and the starting queue and entry date. Refer to the Studio MRG for more information on Item Generators.

Feel free to create your own Item Generators to suit your needs with your own document types, life cycles, queues and values.

The Test Drive feature in the Unity form designer is also helpful for testing. This can be used to view the form as if it is new or not new, as a member of various user groups, or as it will appear based on which life cycle queue it is in. Expand the Execution Log section to see details of each custom action’s execution. For more information, refer to the Unity Forms MRG.