OnBase Guide – Workflow – FormPop Notifications

**Goal:** To configure a FormPop type of workflow notification

**Complexity Level:** Departmental Workflow Developers, Departmental Administrative Users

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**Background**
FormPop allows users to view and edit existing E-Forms and Unity Forms using a simplified Web Client viewer interface, without any extra OnBase functionality or access. This can be useful or necessary in a workflow process to collect additional information or obtain signatures or approvals. FormPop does not allow users to create new forms.

NOTE: Only the Production FormPop URLs can be accessed off campus. Please keep this in mind when testing.

**Prerequisites**
To create a FormPop Workflow Notifications, you must have OnBase Configuration and OnBase Studio installed. Refer to the OnBase Client Guides for installation instructions.

Typically only OnBase Certified Administrators have access to the OnBase Configuration Client. If you need assistance with the Configuration Client steps please contact UIS_DM_SUPPORT@cu.edu.

**OnBase Configuration Client - Add Document Type to User Group**
Add the document type that contains the Unity Form you wish to share via FormPop to the UnityForms Group - X - X group.

1. Log in to 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 list of available document types and moving it to the list of selected document types using the **Add** button or double clicking.
OnBase Studio - Create the Workflow Notification

1. Log into OnBase Studio with an account that has the *Functional - Developer - Workflow* group permission tied to it.

2. Click on the **Notifications** tab within the desired repository.

3. Either create a new notification or navigate to the desired notification if it already exists and check it out. Refer to the Workflow MRG for more information if needed.
4. Click in body text of your notification to place the cursor where you want the FormPOP URL to be.

5. Click on the **Token** button on the Notification tab of the menu and select **DocPop**.

6. You will be presented with a URL dialog that you can fill in with the OnBase environment information. Always make sure that the **Protocol** is changed to https.

7. These are the values that should be used depending on the OnBase environment.

<table>
<thead>
<tr>
<th>SERVER</th>
<th>VIRTUAL_ROOT</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEV</td>
<td>dm-devunityform.dev.cu.edu</td>
</tr>
<tr>
<td>TST</td>
<td>dm-tstunityform.qa.cu.edu</td>
</tr>
</tbody>
</table>
Click on **OK** to have the URL placed into your notification window.

8. The final step is to replace “docpop.aspx” in the resulting URL with “FormPop.aspx”. Simply use your mouse and keyboard to either type it in, or copy and paste.

9. This is an example of what the final FormPop notification URL looks like for DMOTST.

10. When creating a Unity Form “FormPop” notification you have to hardcode the server URL for the OnBase environment. You might want to create separate notifications for each OnBase environment and call the correct one based upon the current environment variable.

See the [OnBase Guide - Unity Script - How to us the Read Environment Variable Script](#) guide on how to setup and determine the OnBase environment.

Otherwise, you will need to update or recreate the URL after migrating the notification to a different environment.
Testing
You will want to test the Unity FormPop to make sure it can be processed correctly.

You won’t be able to use the Generate Test button on the Notification tab in Studio as the docid and checksum portions of the URL won’t generate unless real content is used to populate them when sending the notification.

Instead, use the Item Generators on the Home tab in Studio to create test content. Refer to the Studio MRG for more information on using Item Generators.

Securing FormPop content and links after usage
After a FormPop URL link has been send out via email there are a couple of ways you can secure the content from being viewed or accessed later on.

1. Move the document from the original document type to another document type that is not assigned to the UnityForms Group - X – X group.
2. Add Custom Actions to the Unity form to prevent the UnityForms Group – X – X group from viewing or making revisions to the form after the form has been processed.