OnBase®
Foundation EP5

Unity Forms

Reference Guide

Includes:

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Document Name.....Unity Forms

Department/Group..... Documentation

Revision Number .....Foundation EP5

OVERVIEW

INSTALLATION GUIDE

INSTALLATION

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UNITY FORMS CONFIGURATION

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FORMPOP

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CREATING A SHARED FORM INTEGRATION URL

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UNITY CLIENT USAGE

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WEB CLIENT USAGE

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Understanding Unity Forms

The Unity Forms Designer is a tool that allows you to easily create Unity Forms. This designer provides a point-and-click interface that makes creating Unity Forms simple, yet provides a robust feature set for form configuration. The Unity Forms Designer was designed to provide users with limited technical experience the ability to create forms that are useful and aesthetically appealing, while providing users with a great wealth of technical knowledge the ability to create forms in a fraction of the time they would have previously spent. The designer provides the advanced features necessary for their business processes with no custom scripting. It also provides the ability to create standard form fields as well as form fields that are linked directly to OnBase Keyword Types. This tight integration with OnBase ensures easy configuration for building expansive and easily maintained OnBase solutions.

Form Data Validation

Form validation allows users to ensure that data saved or submitted in a form is valid. Integrity of data is greatly improved by natively providing data validation and by signaling to users that values need to be edited to comply with expected data type values and to ensure that useful data has been entered into the form.

Editing Submitted Forms

Submitted forms can be retrieved for viewing and edited to update information on a form. Either the form will be updated or a new revision of the form will be created, depending on whether the Document Type is configured as revisable. Also, entering information in a repeating section is supported, allowing easy data entry for Multiple Instance Keyword Type Groups values.

Designer

The Forms Designer allows the easy creation of useful, user-configured and error-free form templates that will not require custom scripting, making forms easy to maintain. This designer includes drag and drop control creation for form fields, including Keyword Type value fields. Also, repeating sections with Multi-Instance Keyword Type Group values can be easily configured.

In the Designer, multiple page forms can be created. This allows you to group pertinent information onto a page and control who can access the page, adding another layer of security to a form. In addition, the Designer provides layout flexibility. Using panels, columns can be created to format data, adding an additional layer of layout control within pages.

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The Designer has also added the ability to store data in non-keyword fields. Using XML, users can store data on a form without having to map each value to a Keyword Type.

Field validation can be defined in the Designer. This allows the form designer to configure what type of value a field should contain and then can be validated in the Client. Field validation can be configured for the following data types: currency, dates, numeric values, and alphanumeric values.

Test Driving

Test driving a form allows you to render the form in a browser and "use" the form in the same way you would in the Client within the Designer during configuration. You can test drive a form as different user groups to assess configured form security as well. This allows you to edit a form without publishing it and then having to republish if changes need to be made.

Publishing

Once forms are published from the Designer, the forms are available for use in the Client. There is no need to import template files into a Document Type as the E-Forms module requires. In this way, Unity Forms provides one-click publishing.

Applications

Many customers use OnBase Unity Forms in conjunction with OnBase Workflow to implement paperless business processes, whereby standardized internal documents, such as expense reports and vacation requests, are created, stored, and routed entirely within OnBase. The addition of OnBase Web Server to this configuration enables the submission of online forms, such as order forms and membership applications, making OnBase a vehicle for facilitating e-commerce.

Unity Forms can be used for request processes that may require several levels of verification. For example: Before approval, a Human Resources department's vacation request process may require that one or more managers approve the request.

Example Applications:

- Requesting purchase orders
- Ordering office supplies
- Reporting software bugs and requesting software enhancements
- Submitting online questionnaires
- Creating shipping requests

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Unity Forms functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

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If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 3.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 3.

Simplified Licensing

The Standard User or Premier User license is required.

Legacy Licensing

A Unity Forms license is required. Please contact your first line of support for further information regarding this license.

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The following sections outline requirement information specific to Unity Forms in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Unity Forms and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Operating System Requirements
- Unity Client Platform Requirements
- Database Requirements
- Microsoft .NET Framework Requirements
- Microsoft Visual C++ Requirements
- Miscellaneous Requirements

Note: The OnBase System Assessment Tool can be used to ensure that your workstation meets the minimum system requirements for the Foundation EP5 OnBase Unity Forms. For more information on this tool, see System Assessment Tool on page 206.

Unity Forms Supported Browsers

Fully supported browsers for forms include the following major browsers. For the best experience with these forms, one of the following browsers is recommended:

- Microsoft Internet Explorer 11
- Microsoft Edge on Chromium 89 and greater
- Google Chrome 89 and greater
- Mozilla Firefox 87 and greater
- Apple Safari 14.0 and greater

While other browsers and older versions of the above browsers can be used for submitting Shared Forms, full testing is recommended as some features may not be available and functionality may be degraded.

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Installation

The Unity Forms Designer is installed with the Unity Client. There are no additional installation steps necessary to install Unity Forms. See the Unity Client Module Reference Guide for information on installation. See User Rights on page 13 for information about granting rights to users to allow them to access the Unity Forms Designer.

Note: Viewing Unity Forms is not supported when using the remoting protocol.

Application Server Web.config Settings

The Application Server's Web.config file contains the following Unity Forms specific setting:

UnityFormsToggleMaxFormWidth

UnityFormsToggleMaxFormWidth - When the **UnityFormsToggleMaxFormWidth** setting is set to **true**, the form will not expand the width of the form to match the width of the largest element in the form.

```
<add key="UnityFormsToggleMaxFormWidth" value="false" />
```

FormSaveToTiffTimeout

This sets the timeout (in seconds) for how long the Application Server can take when performing **Save to File** using Default / Tiff format or the **Store Copy as Image on Initial Submit** option. If the timeout is exceeded, the task will be canceled and the image rendering of the form will fail. A message will be logged to the Diagnostics Console stating that the timeout was exceeded. The default timeout is 60 seconds.

```
<add key="FormSaveToTiffTimeout" value="60" />
```

Troubleshooting

Publishing Forms

When publishing forms, if you receive a message stating **Publish failed. Your changes were not saved.**, check to see that the disk group you are using is accessible. In addition, ensure you have rights to the SYS HTML Document Type.

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Signatures

In some browsers, a signature control may not display and a red X may display instead. If you are using Mozilla Firefox 3.5 or earlier, you need to install Adobe Flash Player on the workstation.

Failure to Load Revision or Template List

If a list of revisions fails to load, an error message saying **An error occurred while retrieving the list of revisions.** is displayed. This error message can be displayed when a list of revisions fails to load in one of the following locations:

- When accessing the **Revisions** tab of the **Advanced** tab of the **Open Form Template** dialog box.
- When selecting **Original Revision** in the **Form Instance Update** dialog box.
- When selecting **Specific Revision** in the **Form Instance Update** dialog box.

If the list of form templates in the **Open Form Template** dialog box fails to load, an error message saying **An error occurred while retrieving the list of form templates.** is displayed.

If one of these errors occurs, check the connection to the Application Server. If the Application Server is not the issue, contact your first line of support.

Upgrade Considerations

When using Unity Forms in an IPUP system configuration, new features created for releases may not be backwards compatible with previous versions of the software that you are running in parallel.

The following features were added that are not backwards compatible and if used in a previous version could produce unexpected results or will not function at all and could potentially cause data integrity issues if used in a previous version:

- New **Add Repeater Row** custom action.
- New theme parts added to the **Theme Designer**.
- The **Store Copy as Image on Initial Submit** option.
- Newly enhanced attachment control.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.

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- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

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Configuration Overview

The following steps are necessary to configure a Unity Form template:

1. Create a Document Type to associate with the form template. See Configuring Document Types with Unity Forms on page 11 for more information.
2. Configure User Rights for Unity Forms. See User Rights on page 13 for more information.
3. Access the Designer. See Accessing the Designer on page 14 for more information.
4. Create the form template. See Creating Form Templates on page 15 for more information.
5. Configure form security. See Global Settings on page 135 for more information.
6. Publish the form template. See Publishing Templates on page 168 for more information.

Note: Unity Forms can be created, retrieved, viewed, and modified in the Unity Client and Web Client only and only when licensed for Unity Forms. Unity Form templates can only be designed in the Unity Client Form Designer.

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Configuring Document Types with Unity Forms

There are some specific things that need to be configured related to Document Types before configuring a form template.

- A specific default file format is not required for Document Types that are associated with Unity Forms. The Unity Forms engine does not rely on any specific default file format to be configured at the Document Type level.
- All Keyword Types and Keyword Type Groups that will be needed on a form should be configured on the Document Type that will be used in conjunction with the form. AutoFill Keyword Sets used in Unity Forms also need to be configured and assigned to the appropriate Keyword Types in the Configuration module.

Note: If the Keyword Types assigned to a Document Type associated with Unity Forms are changed, the values on existing Unity Forms associated with Keyword Types that are no longer assigned to the Document Type will be saved as non-keyword data.

Note: If the Keyword Types assigned to a Document Type associated with Workflow Unity Forms are changed, the fields associated with Keyword Types no longer associated with the Document Type will no longer be tied to the Keyword Types. You may need to reconfigure your Workflow solution accordingly.

Note: If the Keyword Types assigned to a Document Type associated with Workflow Unity Forms are changed, the fields associated with Keyword Types need to be removed from the template and added again to sync with the changes made at the Keyword Type level.

- At the time of form template configuration in the Unity Forms Designer, a form template is associated with a Document Type.

Configuring Document Types for Similar Forms

In some cases, multiple forms that have similar purposes, but differ slightly, need to be routed through the same business process. Here are a few examples of when this may occur:

- A form can be slightly different depending on which state invoices were generated in. State laws and taxation can require different data and calculations from state to state to be incorporated on a form. In this scenario, a form template would be created for each state involved in the process tailored to the data requirements for that state.
- A form needs to be available on an external web site, as well as internally in a company. The external form needs to have more instructions and has a fewer number of fields on it than the internal version. The forms follow the same exact process.

If all of the forms follow the same process that is defined in a Workflow Life Cycle, it would not make sense to create a Workflow Life Cycle for each form when these similar forms follow the exact same process.

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In this scenario, it would be most efficient to associate all of the similar form templates with the same Document Type. Multiple form templates can be configured and associated with a single Document Type. Multiple templates should be associated with a single Document Type only when all of the templates are used for the same purpose.

When using multiple templates within a single Document Type, it is recommended to use a Keyword Type to clearly identify what template a document is using and to configure an auto-name string that will clearly identify it.

Configuring Document Types to Not Prompt for New Forms

Upon completion and submission of a form, the system's default behavior is to ask users if they want to create an additional form of the same type. If you do not wish for this message to be displayed for a Unity Form, in the Document Type associated with the form, check the **Don't prompt for new form after submit** check box. This is particularly useful for organizations that have no need to submit the same form consecutively.

To configure a Document Type to not prompt for a new Unity Form after submission:

1. In the Configuration module, select **Document** | **Document Types**.
2. Select the appropriate Document Type.
3. Click **E-Form**.
4. Select the **Don't prompt for new form after submit** check box.
5. Click **Apply**.
6. Click **Close**.

Caution: The **Don't prompt for new form after submit** setting applies to all revisions of the form.

Configuring Icons for Unity Forms

When configuring a Document Type that will be used for a Unity Form template, you can configure an icon that will be displayed next to the Unity Form name during form creation in the Unity Client. To define the icon used for the Unity Form in the Unity Client:

1. In the Configuration module, select **Document** | **Document Types**.
2. Select the Document Type.
3. Click **Icon**.
4. Select the icon you want to associate with the Unity Form from the **Icon** drop-down select menu.
5. Click **Save**.

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User Rights

User Rights Required for Submitting Unity Forms

In order to create and fill out forms, users must have product rights to HTML Forms. To assign product rights:

1. In the Configuration module select **Users | User Groups/Rights**. The **User Groups & Rights** dialog box is displayed.
2. Select the **User Group Name**.
3. Click **Product Rights**. The **Assigning Product Rights for <name> Group** is displayed.
4. Select the **HTML Forms** check box.
5. Click **Save**.

User Rights Required for Publishing Templates

In order to publish form templates, a user must have rights to SYS HTML Forms Document Type. When a template is published, it is stored in the SYS HTML Forms Document Type.

Granting User Rights for Form Templates

In order to grant user groups the rights to use specific sections or pages within a form template or to configure form visibility, there are rights a user must have.

In order for a user to grant rights to other users that belong to their user group(s), a user must belong to a user group that has the **Usergroup Security** in the **Configuration Rights** dialog box, granted at the user group level. If a user belongs to a user group that has this right granted, the user can configure user groups rights on form templates for all the user groups to which he or she belongs.

In order for a user to grants rights to all user groups, the user must have the **User Group Administrator** right granted in the **User Settings** dialog box.

Configuring User Groups the Right to Configure Form Templates

In order for user groups to have the ability to configure form templates, they must be granted the **Unity Forms** Configuration right. If a user group does not have this right granted, users in the user group will not have access to the **Forms | Designer** menu. To grant user groups the right to configure form templates:

1. In the Configuration module, select **Users | User Groups/Rights**.
2. Select the user group you want to grant rights to.
3. Click **Configuration Rights**.
4. Select the **Products** tab.

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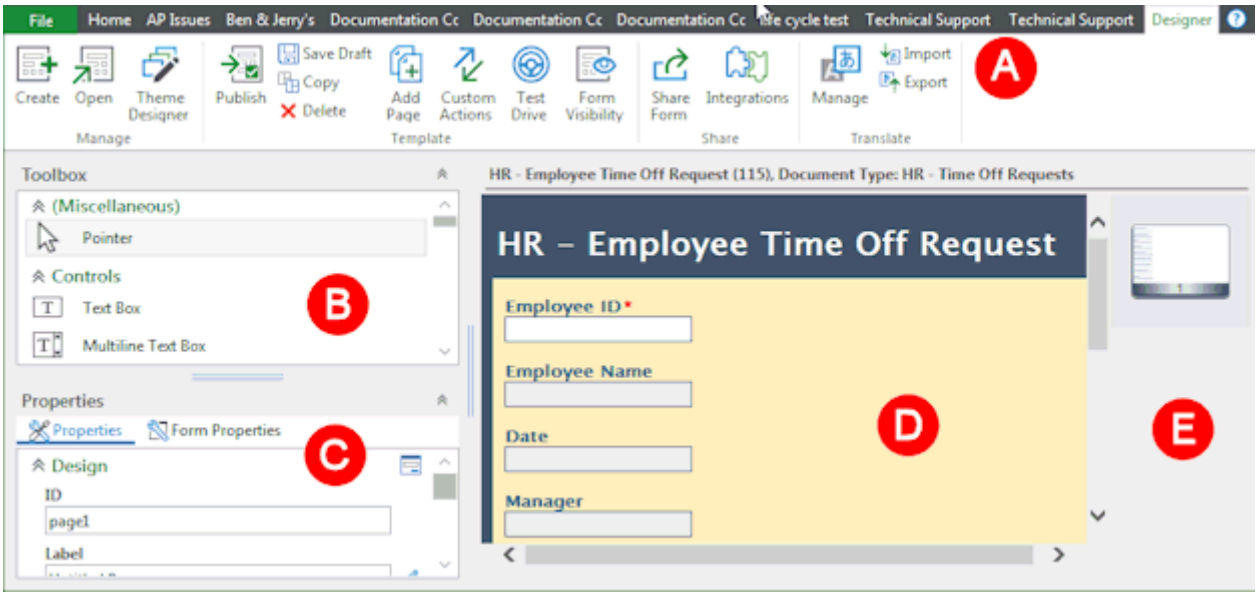
5. Select **Forms Designer**.
6. Click **Save**.

Accessing the Designer

From the **File** menu in the Unity Client, select **Administration** | **Forms Designer**. The **Designer** tab is displayed in the Unity Client.

Layout of Forms Designer

The following is the layout of the Forms Designer.



A

The **Designer** ribbon contains the buttons that allow you to accomplish the following actions:

- create a new form template
- open an existing form template
- publish a template
- test drive a template before publishing
- add pages to the template.

In addition to the **Designer** ribbon, a ribbon is displayed for the selected control in the form. In the example above, a text box is selected, which is accessed by clicking on the **Text Box** tab.

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The **Toolbox** window contains all of the form controls that can be placed on a form. All controls can be added to the form by clicking on the control in the **Toolbox** window and then clicking within the design area or by clicking on the control in the **Toolbox** window and dragging it to the design area.

The **Properties** window contains the **Properties** and **Form Properties** tabs.

The **Properties** tab contains all of the properties that can define a visual display of a control. Each control has different property options. The **Properties** tab also allows you to customize fields for validation and masking. In addition, field requirements and AutoFill Keyword Sets field configuration can be configured in this tab.

The **Form Properties** tab contains the properties of the form, such as the template name and form theme. Users can rename the Unity Form template or apply a different theme in this tab.

The **Design your form** area is the area of the screen where you design the layout of the form. The design area displays the page that is selected in the page pane.

When you are working on a saved draft, **Editing Draft** will display in the header of the design area to designate that you are working on a draft and not a published version of the form.

The page pane contains all of the pages the form contains. In the Client, each page is displayed as a tab.

Creating Form Templates

Creating form templates allows administrators to customize the layout and design of a form at its initial creation and then publish that form template so that every user who has access to the form will see the same form every time they access it.

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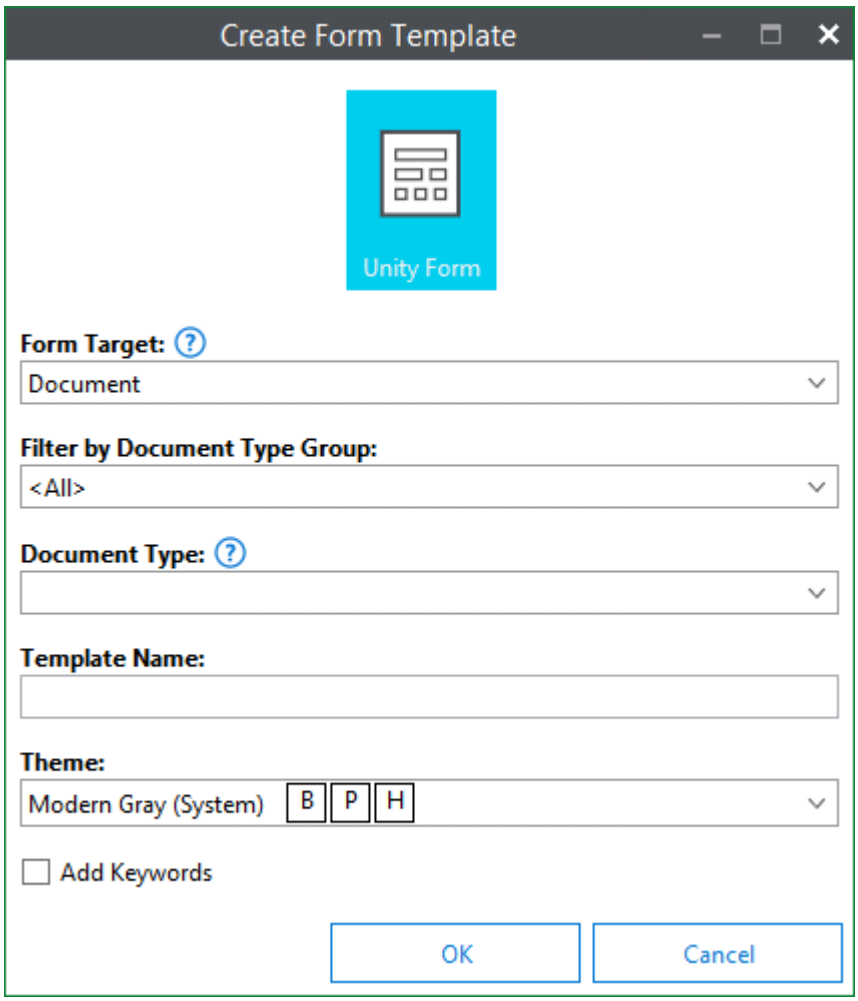
To create a form template:

1. Select the **Designer** tab.
2. Click **Create** in the **Manage** ribbon group. The **Create Form Template** dialog box is displayed.



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3. From the **Form Target** drop-down list, select the type of object that is created when an end user submits a form of this form template type.

Note: If you are not licensed for Workflow, the **Form Target** drop-down list is not displayed since only the **Document** form template is available to use.

   - Select **Document** to configure the form template to create forms as documents.
   - Select **Workflow** to configure the form template to create forms as Workflow objects.

     Note the following limitations related to this type of form template:
     - To be able to configure Workflow form templates, you must be licensed for **Workflow** and have either the **All Life Cycles** or **Assigned Life Cycles Workflow Configuration** User Group configuration right. For more information on licensing and rights, see the **System Administration** module reference guide.
     - Workflow forms can only be configured within the **Create HTML Form (Unity Form)** Workflow action in OnBase Studio. For more information, see the **OnBase Studio** module reference guide.
4. Select a Document Type Group from the **Filter by Document Type Group** drop-down list to narrow the Document Types available for selection.
5. Select the Document Type from the **Document Type** drop-down list. This is the Document Type forms that originate from this form template are stored in.
6. Enter a template name in the **Template Name** field. A value for this field is required and is limited to 80 characters.
7. Select a theme from the **Theme** drop-down list to apply to the new form template. By default the **Modern Gray (System)** theme is selected. There are various system preset themes available.

   Also, user-configured themes are available for selection. For more information on designing a custom theme, see Configuring Themes on page 129.
8. Select **Add Keywords** to add all of the Keyword Types assigned to the selected Document Type as fields on the form template.
9. Click **OK** to create the new form template.

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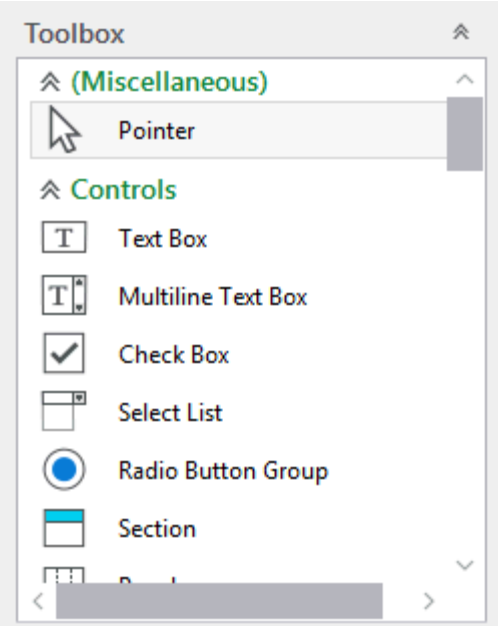
Creating Form Controls

Field options are available in the **Toolbox** window. With two simple clicks, form fields can be added to a form. Select a control from the **Toolbox** and click in the design area to place the field in the location desired.



You can filter what controls are visible in the **Toolbox** by entering text in the **Find** field. To clear the filter, click the **Clear** button to the right of the field.

Keywords and Keyword Type Groups fields are automatically mapped to the appropriate OnBase Keyword. No additional configuration or coding is necessary.

Once an HTML template is created, you can add controls to a form.

Form controls can be added in one of three ways: Select and Click, Drag and Drop, and Double-Click.

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Select and Click

To add a control to a form:

1. Select the control you want to add in the **Toolbox** window.
2. Place your cursor where you want to drop the control. The control will be dropped into the form in the area that is highlighted. The cursor will display as a cross when the cursor is in an area where a control can be placed.

3. Click in the form editor in the position you want the control placed.

Drag and Drop

You can add controls to a form by clicking on the control and dragging it to the area of the form you want to place the control. A cursor with an arrow will display and the area of the form where the control will be placed will be highlighted in yellow. The following is what the cursor will look like when the selected control can be dropped into an area.

Double-Click

Alternately, you can double-click on the control in the **Toolbox** and the control will automatically be added to the bottom of the form.

Controls

The following controls are available for selection in the **Toolbox** window:

Control Name	Description
Pointer	Select existing form fields for editing and deleting.

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Control Name	Description
Attachment	Inserts an attachment control that allows users to upload a document from the Unity Form interface. Multiple upload fields for different Document Types can be configured within a single attachment control. If the uploaded file's extension is the same as the extension of the attachment's Document Type file type, that Document Type's file type will be used. If the uploaded file's extension does not match the Document Type's file format, but does match a file type configured in OnBase, it will use the file type it matches. If the uploaded file's extension is not associated with any file types in the system, the Document Type's default file type with be used. **Note:** This control currently is not supported in the Unity Briefcase. If an attachment control is configured as required, new forms can still be submitted using the Unity Briefcase. When a form created within the Unity Briefcase with a required attachment field is uploaded to the Unity Client and viewed in the Unity Client, an attachment will need to be added before the form can be re-submitted. **Note:** Attachments controls cannot be placed in a repeating section or table control. **Note:** The attachment control is not supported in iOS versions prior to iOS 6. **Note:** This feature is not supported on devices using Android OS 4.4, 4.4.1, or 4.4.2. **Note:** The Attachment control is not supported in Workflow forms.

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Control Name	Description
Bar Code Reader	Inserts a bar code reader control in which a bar code is read and the data captured from that bar code populates a form field. **Note:** In order for this control to function, the Hyland Bar Code Recognition software must be installed on the Application Server. For more information see the Bar Code Process Module Reference Guide. **Note:** This control currently is not supported in the Unity Briefcase. **Note:** This feature is not supported on devices using Android OS 4.4, 4.4.1, or 4.4.2.
Calculated Field	Inserts a calculated field control into the form that defines an expression for that field to determine the calculated result. Calculated fields can be placed within panels, repeating sections, sections, tables, and the body of the form. Calculated fields can also be placed in headers and footers.
CAPTCHA	Inserts a CAPTCHA control on a form that requires users to verify they are people when filling out the form. Each form can only have one CAPTCHA control configured for it. **Note:** This field is always set as required on a form. **Note:** CAPTCHA controls cannot be added to repeating sections, tables, or nested tables. **Note:** CAPTCHA controls can only be used in the **Field is Empty / Not Empty** and **Set Element Visibility** conditions and actions. **Note:** CAPTCHA fields cannot be accessed via the Unity API. **Note:** CAPTCHA fields are not functional in offline Unity Forms. **Note:** CAPTCHA fields cannot be used in expressions. **Note:** The CAPTCHA control is not supported in Workflow forms.

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Control Name	Description
Condition Button	Inserts a condition button control that can be used in conjunction with the **Condition Button Clicked** custom action. If a button is on the form, but it is not referenced by a **Condition Button Clicked** custom action, the form cannot be published. If you want to place a condition button in a nested table, you must select a field within the nested table and change the **Control Type** option to **Condition Button** within the **Properties** tab. See Condition Button Clicked on page 144 for more information.
Check Box	Inserts a check box control that can be edited by users when forms are created. Check boxes can be placed within panels, repeating sections, sections, tables, and the body of the form. **Note:** Check boxes cannot be mapped to date or currency formatted fields.
Drawing	Inserts a drawing control where users can draw or place text. An image can be used as a background for the drawing area and users can then draw on top of an image. **Note:** If you are using a browser that does not support the drawing control, the control will display **Your browser does not support the drawing control**. **Note:** Drawing controls cannot be placed in a repeating section or table control. **Note:** The Drawing control is not supported in Workflow forms.
Image	Inserts an image control that allows you to place an image that is stored in **SYS - System Bitmaps** on a form. **Note:** Images can be placed within panels, repeating sections, other sections, and the body of the form.

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Control Name	Description
Keyword Type Groups	Inserts a Keyword Group control when the Document Type selected to save the template in has Multi-Instance Keyword Type Groups configured. You can place a Multi-Instance Keyword Type Group in a repeating section or a table. When a Multi-Instance Keyword Type Group is placed in a template and **Repeater** is selected, a repeating section is created and automatically associated with the group. Only the Multi-Instance Keyword Type Group can be placed in this repeating section. No other controls can be added. When a Multi-Instance Keyword Type Group is placed in a template and **Table** is selected, a table is created and automatically associated with the group. Only the Multi-Instance Keyword Type Group can be placed in this table. No other controls can be added. **Note:** Sections and panels can be added to repeating sections created for Multi-Instance Keyword Type Groups. You cannot drag a section or panel that contains a Multi-Instance Keyword Type Group out of a Multi-Instance Keyword Type Group repeating section. **Caution:** If a configuration change is made to a Keyword Type in the Configuration module, in order to ensure your form reflects the change, remove the Keyword field from your form, add the Keyword field back onto your form, and publish the form to finalize the change.

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Control Name	Description
Keywords	Inserts Keyword controls when the Document Type selected to save the template in has Keyword Types or Single-Instance Keyword Type Groups configured. **Note:** Only one instance of a Keyword Type can be placed within a form. If a form is a multiple-page form, only one instance of a Keyword Type can exist among all of the pages. **Note:** Encrypted Keyword Types and Specific Currency Keyword Types are not available for selection in the Forms Designer. **Note:** If you are using a Keyword Type configured to be **Invisible** and you place the Keyword Type on a form, you must use Unity Forms security to hide the field. Otherwise, the Keyword Type will display on the form. **Caution:** If a configuration change is made to a Keyword Type in the Configuration module, in order to ensure your form reflects the change, remove the Keyword field from your form, add the Keyword field back onto your form, and publish the form to finalize the change.
Lookup Button	Inserts a lookup button control on the form. The button is configured to use a specific AutoFill Keyword Set to fill configured associated fields on the form. The lookup control is only available when the Document Type associated with the form has the primary Keyword Type and at least one secondary Keyword Type assigned to an AutoFill Keyword Set. See Configuring Lookup Buttons on page 60 for more information. **Note:** If using Unity Forms in conjunction with the Unity Briefcase, the lookup button control is disabled when forms are opened in the Briefcase application. **Note:** Lookup buttons cannot be placed in a repeating section or table control.
Multiline Text Box	Inserts a multiline text box control that allows multiple lines of text that can be edited by users when forms are created and contains a scroll bar. Multiline text boxes can be placed within panels, repeating sections, sections, tables, and the body of a form.

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Control Name	Description
Nested Table	Inserts a nested table control that can be used when a list item has several list items associated with it. Each top level list item can have secondary list items associated with it. Nested tables do not use Keyword Type or Keyword Type Group fields. A nested table can placed in a pane, section or the body of a form. In addition, you cannot place other controls in a nested table outside of the nested table wizard. Likewise, you cannot remove controls from a nested table outside of the nested table wizard. See Configuring Nested Tables on page 91 for more information. **Note:** The Nested Table control is not supported in Workflow forms.
Panel	Inserts a panel control that functions as a container element that can be used to group other elements. Any control type can be placed within a panel. Panels can be placed within panels, repeating sections, sections, and the body of a form. A panel control containing a calculated field, paragraph, image, lookup button, or submit control can be placed in a header or footer. If a panel contains any control not in this list, it cannot be placed in a header or footer. Once a panel is in a header or footer, any control not listed above cannot be added to the panel.
Paragraph	Inserts a paragraph control. The paragraph is defined in the designer. This option is used to present read-only information to users when a form is being created. Paragraphs can be placed within panels, repeating sections, sections, and the body of the form.
Print Button	Inserts a print button control that allows users to print a form. **Note:** Print buttons cannot be placed within repeating sections or tables. **Note:** Print buttons are not supported for Workflow forms.

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Control Name	Description
Radio Button Group	Inserts a radio button group control that allows you to place a group of radio buttons with configured values associated with each selection option. **Note:** Radio Button Groups can be placed within panels, repeating sections, sections, tables, and the body of the form.
Repeating Section	Inserts a repeating section control. **Note:** When configuring Multi-Instance Keyword Type Groups as a repeating section, the following controls can be placed in a Multi-Instance Keyword Type Group's repeating section: sections, panels, paragraphs, images, and calculated fields. You must create a standalone repeating section for other controls. For more information, see Repeating Section and Table on page 43. Repeating sections can also contain check boxes, multiline text boxes, panels, paragraphs, sections, and text boxes. Section controls can be placed within a repeating section control. Repeating sections can be placed within panels, sections, and the body of the form. **Note:** Only Keyword Types that belong to a Multi-Instance Keyword Type Group can be added to a repeating section. **Note:** Repeating Sections cannot be placed in another repeating section control.
Section	Inserts a section control. A section can have other controls dropped into it and can be configured to be collapsible. A section divider line is also inserted. Any control type can be placed within a section. Sections can be placed within panels, repeating sections, other sections, and the body of the form.
Select List	Inserts a field for which a self-configurable data set can be configured. A drop-down list is available in the Client. Select lists can be placed within panels, repeating sections, sections, tables, and the body of the form.

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Control Name	Description
Signature	Inserts a signature control. In the Client, signatures can be signed on a form using a mouse or, on a touchpad interface, using a stylus. In addition, a properly installed Topaz signature pad can be used with this signature control. In order to use this with forms, you must install the SigWeb driver provided by Topaz, available from https://www.topazsystems.com/sigweb.html. You must configure the fields associated with a signature field. See Configuring a Signature Field on page 74 for more information. **Note:** Signature controls cannot be placed in a repeating section or table control. **Note:** The Signature control is not supported in Workflow forms.
Submit Button	Inserts a submit button control. Submit buttons can be placed within panels, sections, or the body of the form. **Note:** Submit buttons cannot be placed in a repeating section control.
Table	Inserts a table control that allows you to render data in a table format. Text boxes, multiline text boxes, and check boxes can be added to tables. Tables can be placed within panels, sections, and the body of the form. **Note:** Tables cannot be placed in a repeating section control.
Text Box	Inserts a text box control that can be edited by users when forms are created. Text boxes can be placed with panels, repeating sections, sections, tables, and the body of the form.

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Control Name	Description
Properties	Inserts a system property control. See Available Property Controls on page 28 for more information. **Note:** Properties cannot be placed in a repeating section or table control.

Available Property Controls

Property	Description
Created By	The user who brought the document into the system. When used in a Workflow form, this property will display who created the work item that form is interfacing with.
Created By User's Email Address	The email address associated with the user who brought the document into the system. The email address is configured at the user level in the Configuration module. If no email address is configured for the user who submitted the form, the field will not display a value. When used in a Workflow form, this property will display the email address of the user who created the work item that form is interfacing with.
Created By User's Real Name	The real name associated with the user who brought the document into the system. The real name is configured at the user level in the Configuration module. If no real name is configured for the user who submitted the form, the field will not display a value. When used in a Workflow form, this property will display the name of the user who created the work item that form is interfacing with.
Current User's Display Name	The display name of the currently logged in user, based on the Global Client Setting in the Configuration module. If the Global Client Setting is set to show the user's real name, and no real name has been configured, this property will display the OnBase user name. **Note:** This property will populate upon form creation.
Current User's Email Address	The email address of the currently logged in user. **Note:** This property will populate upon form creation.

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Property	Description
Current User's ID	The User ID of the currently logged in user. **Note:** This property will populate upon form creation.
Current User's Locale	The user locale of the currently logged in user's session on the form. It will be displayed in the format "language-region." For example, the United States English locale would be displayed EN-US. **Note:** This property will populate upon form creation.
Current User's Name	The OnBase user name of the currently logged in user. **Note:** This property will populate upon form creation.
Current User's Real Name	The real name of the currently logged in user, which is specified in the Configuration module. If no real name has been specified, this property will be left blank. **Note:** This property will populate upon form creation.
Date Stored	The date when the document was imported into the system. If an invoice from December 28, 1996, was brought into the system on March 11, 1997, December 28, 1996 is the document date and March 11, 1997 is the date stored. Documents cannot be searched based on the date stored. When used in a Workflow form, this property will display the date the work item was stored that the form is interfacing with.
Document Date	The document date. The document date is assigned to a document at the time of import. **Note:** This property is not available for Workflow forms.
Document Handle	The document handle, which is the unique number that identifies a document in the database. **Note:** This property is not available for Workflow forms.
Form Revision	The form template revision that is used for the displayed form. When a form template is edited and republished, the form revision is incremented by 1.

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Property	Description
Time Stored	The time when the document was imported into the system. When used in a Workflow form, this property will display the time the work item was stored that the form is interfacing with.
Work Item Date	The document date of the work item the form is interfacing with. The document date is assigned to a document at the time of import. **Note:** This property is only available for Workflow forms.
Work Item ID	The document handle, which is the unique number that identifies a document in the database, of the work item the form is interfacing with. **Note:** This property is only available for Workflow forms.

Properties

Each control type has a set of properties that can be used to define a control.

You can edit the properties of an added control. To edit the properties of a control:

1. Select the **Pointer** option in the **Toolbox** window.
2. Click on the control in the editor that you want to edit.
3. The **Properties** window will display the properties options available for the type of control that was selected.
4. Make the appropriate property changes.

The following properties are available for all control types:

Property	Description
ID	The ID name for the field. This ID value should be unique. The following limitations apply for entering ID values: • You cannot paste into the ID field. • You cannot type more than 75 characters into ID field. • You cannot type spaces into the ID field. • You cannot type characters not allowed in the current language you have selected for naming an HTML field. • Valid characters for IDs: [a-z][A-Z][0-9]. • ID names must start with [a-z] or [A-Z]. • Special characters cannot be entered as part of an ID name.

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Each field control has the following option:

Property	Description
Control Type	The type of control associated with the field. You can change a field's control type by selecting an option from this drop-down list.

Fields that data is entered into have the following properties available. Some properties are dependent on the Data Type selected for the field:

Property	Description
Data Type	The data type associated with the field. The options are: **Text**, **Numeric (Up to 9 Digits)**, **Numeric (Up to 20 Digits)**, **Floating Point**, **Date**, or **Currency**. **Note:** This property is not editable for fields configured as System Properties.
Date Range	**Note:** Available when configuring a Date field. The range of dates the field can accept as a valid date. To configure this range, click the ellipse button next to the field. See Date Fields on page 67 for more information.
Default Value	The value associated with the field by default. The maximum number of characters respects the character length of the Keyword Type associated with the field or the value of the **Max Length** field property, depending on the field's configuration. **Note:** When configuring a check box, enter the value of the **Check Value** property in the **Default Value** property field if you want the check box to be selected by default. Entering any other value will leave the check box not selected by default. When using Workflow forms, default values will be loaded when a field that has a default value configured does not have a value. In addition, The **Fill form fields with keyword and property values** option, within the **Display HTML Form (Unity Form)** action, must be selected for default values to be populated.

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Property	Description
Display Size	**Note:** This is available for the following controls: Calculated Field, Text Box, Keywords, Properties, and Select List. The width of a field. When a control is added to a form, the value is 0. 0 represents the default size for a browser's input field size. The minimum value that can be entered is 1. The maximum value is dependent on the size of the container the control is within. If a value greater than the maximum size allowed for a container is entered, the control width will adjust to the maximum value allowed for the container. The number entered is approximately the number of characters the control can contain. Depending on the font used in the control, more or less characters than the number specified can be entered in the control.

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Property	Description
Field Source	The storage location for a field value. If the field is a non-keyword field, **Disk Group (XML)** is displayed. If the field is a keyword field, the Keyword Type is displayed. If the field is a System Property field, the System Property name is displayed. When configuring a Workflow form, the **Field Source** will default to **Workflow Property**. This allows you to use a Workflow property to populate the field. You must specify the name of the property you want to use in the **Property Name** field. Only non-array values are supported. **Note: Workflow Property** fields cannot be configured with a repeating section. **Note:** A Workflow property can only by used in one field within a form. **Note:** If the Workflow property you use contains an array, the first value in the array is the value that will be used in the form. After the user submits the form, if the new array is made up of only 1 element, then it will be converted to a string. If the field in a Workflow form is not tied to a Workflow property, select **Temporary** for the **Field Source**. Fields configured as **Temporary** will not store or load data in the form. The fields are to be used in conjunction with custom actions, unity scripts, and calculated fields to drive dynamic functionality on the form. You can edit the field source by selecting the appropriate option from the drop-down list. Keyword Types that are available for the form and are currently not used on the form will be available for selection. If no Keyword Types are available, **No Available Keywords** is displayed in the drop-down list. When a change to the **Field Source** is made to a Keyword Type, the data type will also be updated to reflect the data type the Keyword Type is configured for. When a data type is changed, applicable properties for the field will also update based on the data type configured. **Note:** The **Field Source** for **System Property** fields cannot be edited. **Note:** The **Field Source** cannot be edit for fields in tables, repeaters, or nested repeaters. The **Field Source** cannot be edited for fields configured with auto-numbering.

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Property	Description
Field Source (continued)	**Note:** If a field source is edited, test all calculated field and custom action configurations the field impacts. In addition, if your form uses AutoFill Keyword Sets or Data Sets, test your form's configuration in test drive after editing field sources. **Note:** When changing the field source to a new Keyword Type, if the current **Max Length** is 0 or set to a number greater than the Keyword Type's maximum length, the field's **Max Length** is set to the Keyword Type's maximum length. **Note:** When changing the field source to a new Keyword Type, if it has a mask, the mask is copied to the **Mask** property field. If the new Keyword Type does not have a mask configured, the current value for the **Mask** property is retained. **Note:** When changing the field source, the **Full Field Entry Required**, **Required**, and **Value Must Exist in Data Set** property fields will retain the Keyword Types setting, if set to true, within the property field. If the newly selected Keyword Type is not set to true for these settings, the property fields' values will be retained for each setting not set to true. **Note:** When changing the field source to a currency Keyword Type, the currency format from the Keyword Type, if it has one, is set in the **Currency** property field if there is no format currently configured for the property. If the **Currency** property is already configured, the value will be retained.
Property Conversion Error Action	**Note:** This option is only available when configuring a field configured with a **Field Source** of **Workflow Property**. You can select either **Hide property value** or **Display property value** from the drop-down list. When **Hide property value** is selected, values that do not meet the field requirements that exist in the specified Workflow property is not displayed. If a user adds a value to the field manually, it will overwrite the value stored. When **Display property value** is selected, values that do not meet the field requirements that exist in the specified Workflow property is displayed in the field. In this case, the field is invalid after the form loads.

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Property	Description
Full Field Entry Required	**Note:** Available when configuring an alphanumeric data type. This is not available for **Multiline** fields. When this property is selected on a field configured for masking, full values must be entered into the field. Partial or blank values are not valid entries when this option is set and the form cannot be saved until the full value is entered. **Note:** Fields configured with masking previous to this enhancement will have this option selected by default. This will persist until the option is deselected and the form is republished.
Mask	**Note:** Available when configuring a Text field. This property is only available when configuring text box and select list controls. The masking configured for a field. To configure a mask for an alphanumeric or numeric data field, click the edit button next to the property. See Alphanumeric Fields on page 70 or Numeric Fields on page 68 for more information.
Max Length	**Note:** Available when configuring a Text field. This property is only available for text box and select list controls. The maximum number of characters allowed in the field. See Alphanumeric Fields on page 70 for more information.
Numeric Range	**Note:** Available when configuring a Numeric or Floating Point field. This property is only available for text box and select list controls. The range of numeric values in which the field can accept as a valid value. To configure this range, click the ellipse button next to the field. See Currency Fields on page 65 for more information.

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Property	Description
Read-Only	The selected form control is displayed as read-only. Fields, sections, and pages can be set to display as read-only. **Note:** Marking a field mapped to a Keyword Type as read-only will not prevent a user from altering the values in the keyword panel. Keyword Types must be set as read-only at the Document Type level to prevent users from altering values in the keyword panel. **Note:** Expanding AutoFill Keyword Sets will fill Keyword Types fields configured as read-only even if the user does not have the **Access Restricted Keywords** privilege.
Required	The field is required. When this property is not selected, the field is not required. **Note:** This property is not available for fields configured as a System Property field. **Note:** If a field is added that is associated with a Keyword Type which is required on the Form's Document Type, the **Required** property is selected by default. **Caution:** If a field is configured to be both read-only and required, the required setting is ignored. In the event the field is not populated automatically, the form would not be able to be submitted if the required option was respected because the field could not be edited so that it contained data.

Attachment Control

Property	Description
Attachment Configuration	Click the **Attachment Configuration** button to open the **Attachment Configuration** dialog box that allows you to configure which file types can be attached to the form. For more information, see Configuring the Attachment Control on page 83.
Allow Attachments After Submission	Select this option to allow users to attach documents to the form after it is submitted.

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Property	Description
Allow Attachment Removal After Submission	Select this option to allow users to remove attachments from the form after it is submitted.
Display Attachments in a Single Sortable List	Select this option to display all attachments in the control in a single list that can be arranged by dragging and dropping.
Label	Enter text to use as the label for the attachment control. **Note:** If you edit the format of the label to something different than the default formatting, the attachment count will not be displayed at runtime.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Bar Code Reader Control

Property	Description
Bar Code Reader Configuration	The field that will be populated from data captured from the bar code. Clicking on the edit button opens the **Bar Code Reader** screen.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Calculated Field

Property	Description
Display Style	Defines how the value of a calculated field is displayed. If **Text Box** is selected, the calculated field value will be displayed in a standard text box. If **Label** is selected, the calculated field will be displayed as text and will not be inside a standard text box.
Expression	Defines the expression used to determined the value of the selected calculated field. Clicking on the edit button opens the **Expression** screen, allowing you to define the expression.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

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CAPTCHA

Property	Description
Visible On New Forms Only	If you only want the CAPTCHA control displayed on a form when the form is new, select this option.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Check Box

Property	Description
Checked Value	The value that is stored when the check box is selected.
Label	The text that is used as the label for the check box control.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Condition Button

Property	Description
Label	The text that is used as the label for the condition button control.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Drawing

Property	Description
Label	The text that is used as the label for the drawing control.

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Property	Description
Background Image	The background image to the drawing control's drawing area. Images stored in the **SYS System Bitmap** Document Type can be used as a background image for this control. Click the edit button next to the property field and select an image from the displayed list and click **Finish**. If you choose an image smaller than the defined width and height, the image will be tiled. **Note:** JPEG, PNG, and BMP file formats are supported. JPEG and PNG are recommended for compression.
Width	The width of the control, measured in pixels.
Height	The height of the control, measured in pixels.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Image

Property	Description
Alternative Text	Enter the text you want to be read to a user to describe the image displayed who is using screen reading software.
Source	The image that is displayed in the form. You can click the edit button to edit the image that is displayed on a form.

Keywords

Property	Description
Label	The text that is used as the label for the keywords control.
Autofill	This property is available when a Keyword Type is associated with an AutoFill Keyword Set. See AutoFill Keyword Sets in Unity Forms on page 58 for more information.
Create Autofill record on create	This property is available when a Keyword Type is associated with an AutoFill Keyword Set. See AutoFill Keyword Sets in Unity Forms on page 58 for more information.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

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Lookup Button

Property	Description
Reverse Lookup Configuration	The AutoFill Keyword Set that is associated with a lookup button. See Configuring Lookup Buttons on page 60 for more information.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Multi-Instance Keyword Type Groups (Repeating Section and Table)

The following table lists the properties available for the Keyword Type Group control:

Property	Description
Label	Enter text to use as the label for the Keyword Type Group control.
Keywords	Select the **Keywords** button to open the **Keyword Type Configuration** dialog box for the selected Keyword Type Group. This dialog box allows you to add or remove Keyword Types on the form. For information on configuring Keyword Types, see the **System Administration** module reference guide.
Default Row Count	Enter the number of rows that are displayed by default when a new form is displayed. A row in a Keyword Type Group repeating section or table equates to a single instance of a Keyword Type Group. When configuring a Workflow form and a Keyword Type Group is within a repeating section, default rows are displayed when the Keyword Type Group has no values. When the Keyword Type Group has values, only those value sets are displayed, regardless of the number of default rows.
Default Rows Cannot be Removed	Select this option to not allow users to remove the default number of rows in the Keyword Type Group repeating section or table on the form. The default number of rows is configured in the **Default Row Count** property.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

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Multiline Text Box

Property	Description
Automatically Expand Height	Allows you to set the field to automatically resize when text is entered into the field that exceeds the current height of the field. **Note:** If a form has many multiline text boxes, enabling this option for all of these fields will impact performance. **Note:** It is recommended to set maximum lengths for fields that use this option to avoid users adding excessive amounts of text to the fields.
Label	The text that is used as the label for the multiline text box control.
Rows	The number of text rows that are displayed on the form for the selected multiline field. The number of rows can be set from 0-1000. If set to 0, the default number of 2 rows will be used.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Nested Table

Property	Description
Label	The text that is used as the label for the nested table control.
Nested Table Configuration	Click the **Nested Table Configuration** button to open the **Nested Table Configuration** dialog box. For more information, see Configuring Nested Tables on page 91.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Panel

Property	Description
Duplicate Panel Layout	Allows you to create a panel with a duplicated configuration for the panel and columns of the selected panel and places it on the form.

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Property	Description
Columns	The number of columns in the panel. You can select 1 to 10 columns and the width of each column. Clicking the **Column** edit button will open the **Panel Designer** dialog box.
Collapse Empty Columns	When selected, empty panels will be collapsed.
Orientation	When a column is selected within a panel, this property is displayed. This property allows you to define how you want the fields in the column organized, which coincides with the tabbing direction. You can format a column to either be **Horizontal** or **Vertical**. See Configuring Columns on page 64 for more information.
Width (%)	When a column is selected within a panel, this property is displayed. This property displays the defined width of the column and is read-only. In order to edit the width, you must click the edit button next to the property in order to open the **Panel Designer** dialog box.

Paragraph

Property	Description
Content	The paragraph of text that is displayed in the form as read-only. Paragraph fields can be formatted by clicking on the edit button next to the **Content** field.

Radio Button Group

Property	Description
Label	The text that is used as the label for the radio button group control.
Orientation	The orientation of radio buttons, organized vertically or horizontally.
Button Label Position	Allows you configure where the labels for each radio button will display in relation to their corresponding radio button. You can select **Left**, **Right**, **Top**, or **Bottom** to determine where the label is placed.

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Property	Description
Radio Button Group Configuration	Click the **Radio Button Group Configuration** button to open the **Radio Button Group Configuration** dialog box. For more information, see Configuring Radio Button Groups on page 56.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Repeating Section and Table

Property	Description
Label	The text that is used as the label for the repeating section control.
Default Row Count	The number of rows that are displayed in a repeating section when a new form is displayed.
Default Rows Cannot be Removed	Allows you to display no less than the default number of rows specified in the **Default Row Count** property.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Section

Property	Description
Default Visual State	The default view of the selected section. Options are **Expanded** or **Collapsed**.
Is Collapsible?	Defines whether or not the selected section can be expanded or collapsed. Options are **true** or **false**.
Label	The text that is used as the label for the section control.

For information on the Security properties, see Global Settings on page 135.

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Select List

Property	Description
Label	Enter text that is used as the label for the select list control.
Data Set	Select the Data Set to be used in the select list. You can configure a Self Configured Data Set to associate with the field by clicking the **Data Set** button that opens the **Data Set Editor** dialog box. For more information, see Configuring Self Configured Data Sets on page 67.
Maximum Results	Specify the maximum number of values displayed in the drop-down list at a time. If the value is set to **0**, all available values will be returned. **Note:** Since type-ahead filtering is not available for use when using External Keyword Data Sets, ensure that your limit will return all the values necessary for selection.
Value must exist	Select this property to require that the value must exist in the Data Set associated with the Keyword Type in order to save data in the field. Deselect this option if the value does not need to exist in the Data Set in order to be saved. This property overrides the **Keyword Must Exist** setting in the Configuration module. **Note:** Data Set value comparison is case insensitive.
Allow original values	Select this property to ensure values that are no longer in the Data Set associated with the select list will still be valid selections in the select list on the form. **Note:** The **Value must exist** property must be selected for the **Allow original values** property to be available.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Submit Button

Property	Description
Label	The text that is used as the label for the submit button control.

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Property	Description
Close Standalone Window	If selected, forms that open in a window that is separate from the main OnBase interface window to close when the **Submit** button is clicked. **Note:** When used in the context of DocPop or FormPop, this option is only supported when using Internet Explorer.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Text Box

Property	Description
Label	The text that is used as the label for the text box control.
Maximum Length	The maximum length of the value entered in the selected text box field.
Tab Index	The tab index order value for the control. For more information on tab index order, see Tab Index Order on page 137.

Identifying Unity Form Name and Associated Document Type

When working in the Unity Forms Designer, you can identify what the name of the form is, the document ID number of the form template, and the Document Type the form template is associated with. This information is displayed above the design space. The following is an example:

First, the name of the Unity Form is displayed. Next, the document ID number of the form template is displayed in parentheses. If the form template has not been published, the document ID is 0. Last, the Document Type that the form template belongs to is displayed.

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Tabbed Form Layout

To create forms with a tabbed layout, multiple pages are configured. The number of pages corresponds to the number of tabs in a form. The pages are displayed in the page pane in the designer.

In the Client, the pages are displayed as tabs. The above Designer configuration looks like the following in the Client:

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You can click on another tab to access different information. Clicking **Application Info** displays the following fields:

Each tab can have separate security. This allows pertinent information to be grouped together on a page and security can control what users see a page, adding another layer of security to a form.

Creating Multiple Page Forms

To add another page to an HTML form, with a template open in the designer, click **Add New Page** on the **Designer** tab. A new page is displayed. Once the new page is created, you can add form controls to the page.

You can navigate from one page to another by clicking on the page thumbnails in the **Pages** pane.

You can also reorder pages of a form. To reorder pages, click on a page's thumbnail and drag it to the correct position in the sequence.

Deleting Pages

You can also delete a page by hovering over the page thumbnail and clicking the red X button that appears in the upper right-hand corner of the thumbnail that corresponds to the page.

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Assigning a Theme to a Form

Once a theme is configured, it can be applied to a form. To apply a theme to a form:

1. With a form open in the Designer, select the **Form Properties** tab in the **Properties** pane.
2. Select a theme from the **Theme** from the drop-down list. Alternatively, you can click the corresponding edit button to launch the **Theme Designer** and edit the selected theme.

   System themes cannot be edited. Only user-configured themes can be edited. Preset themes have names followed with (System). These system-defined themes cannot be edited, but can be duplicated to create a user-configured theme that is based on the preset theme. For more information about creating themes, see Theme Designer on page 128.

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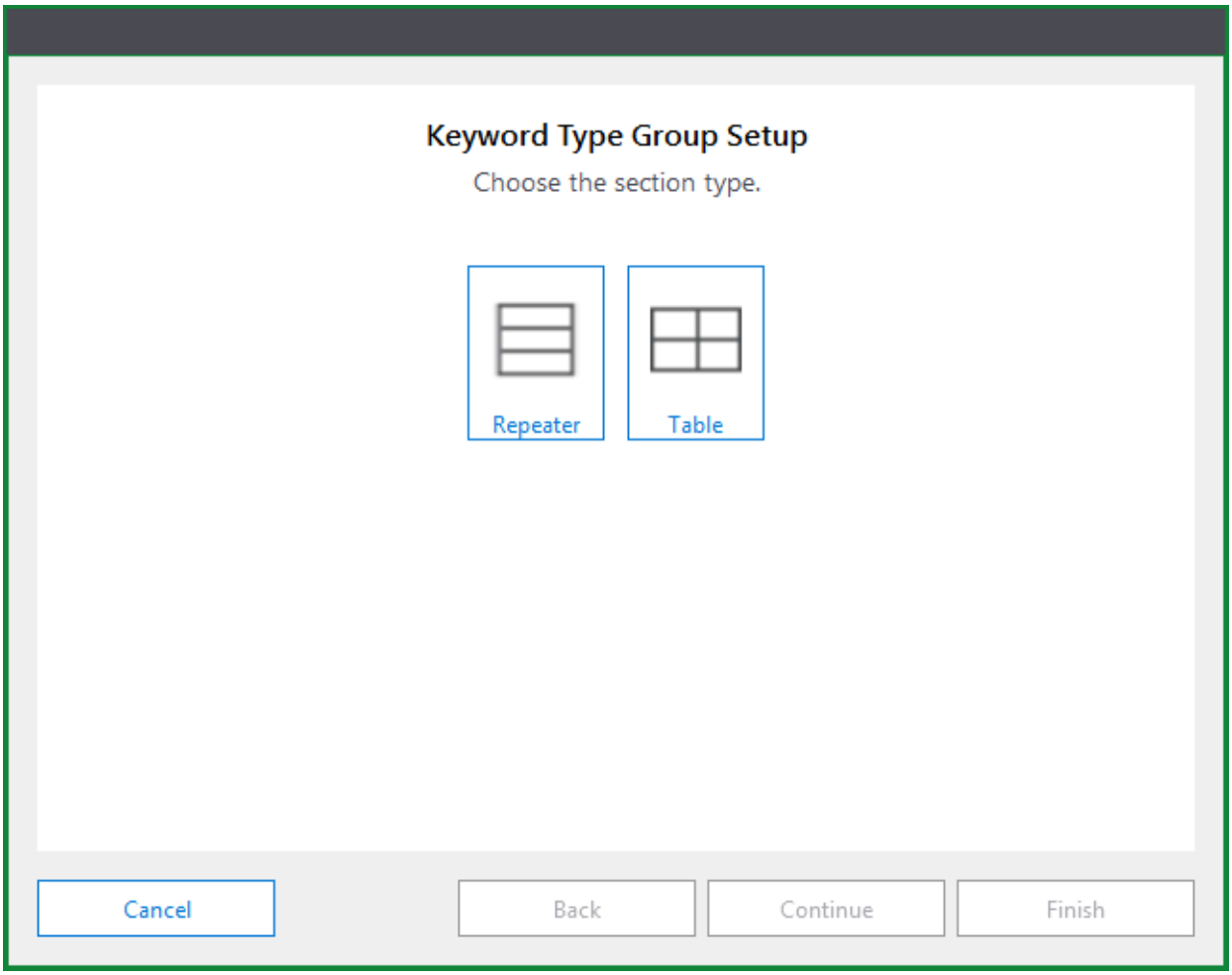
Adding Keyword Type Groups to a Form

To add a Multiple Instance Keyword Type Group to a form:

1. Select a Keyword Type Group from the **Keyword Groups** toolbox.
2. Click in the location on the form where you want to place the control. The **Keyword Group Setup** screen is displayed.



3. Click **Repeater** if you want to place the Keyword Type Group in a repeating section, or click **Table** to place the Keyword Type Group in a table control.
4. Click **Finish** to place the Keyword Type Group on the form template, automatically including all the Keyword Types in the Keyword Type Group.

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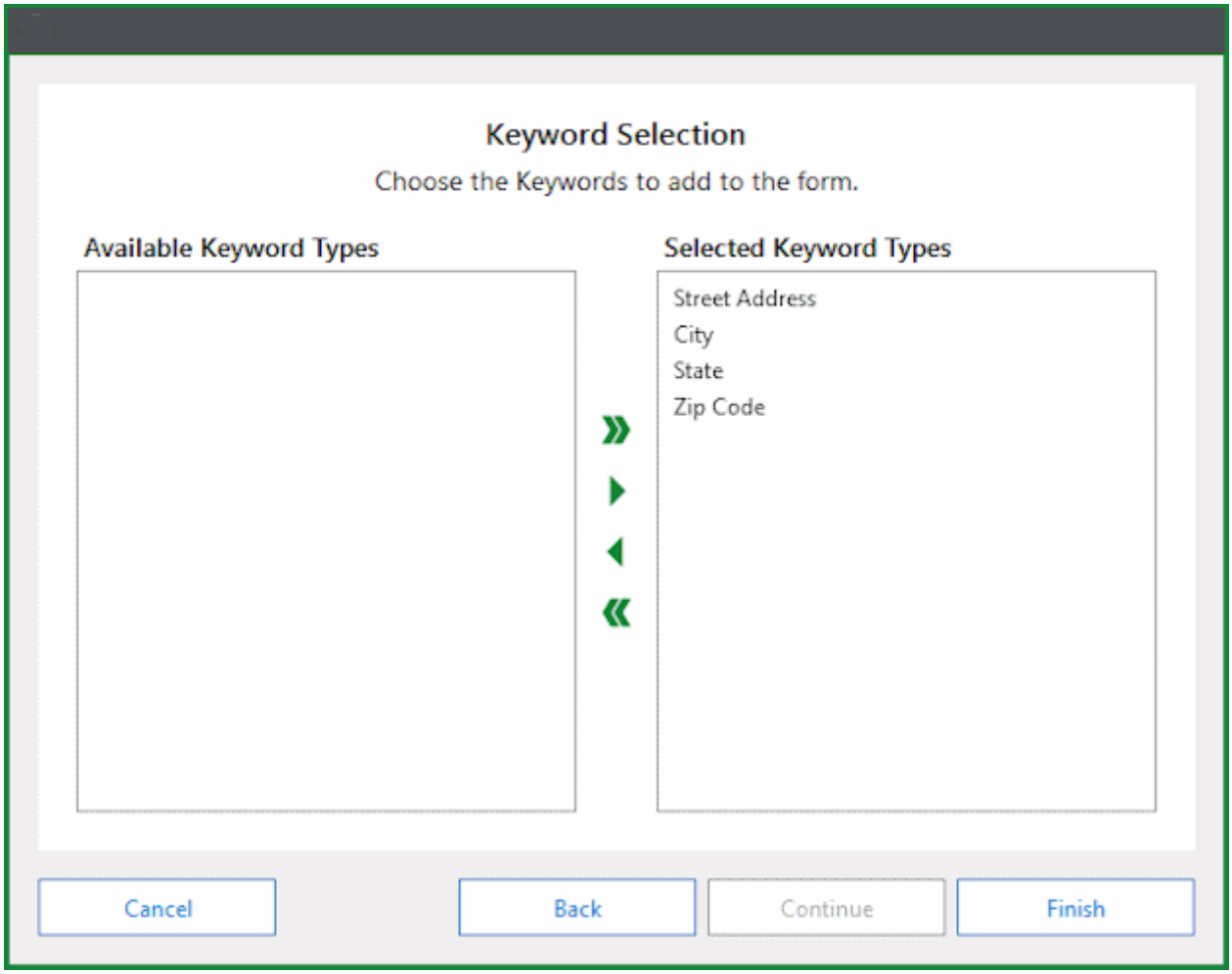
5. Click **Continue** to manually select the Keyword Types that are placed on the form template. The **Keyword Selection** screen is displayed.



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6. By default, all Keyword Types are in the **Selected Keyword Type** box. If you do not want a Keyword Type placed in the control, you can select it and click **Remove Selected Items**. Alternately, you can double-click on a Keyword Type to remove it. Repeat this step for each Keyword Type you would like to remove.

Note: You can select multiple Keyword Types at one time by pressing **Ctrl** on the keyboard while selecting Keyword Types. You can select a block of Keyword Types at one time by pressing **Shift** on the keyboard, selecting the first Keyword Type in the list that you want to remove, and then selecting the last Keyword Type in the list that you want to remove.

If you want to remove all of the Keyword Types from the form, click the **Remove All Items** button.

Note: You can use the **Add Selected Items** button to add a Keyword Type from the **Available Keyword Types** box or click **Add All Items** to add all of the Keyword Types.

7. Click **Finish**.

Note: You can edit the Keyword Types placed in the repeating section/table by clicking the edit button next to the **Keywords** property.

Configuring Non-Keyword Text Fields

When a text box is placed on a form, by default it is configured as a non-keyword field that will store the data entered as XML in the post information on the disk group. This allows data to be stored in a form without requiring fields to be mapped to Keyword Types. To verify that a field is configured as a non-keyword field:

1. Select the field on the form.
2. In the **Properties** pane, the **Field** property should display as **Disk Group (XML)**.

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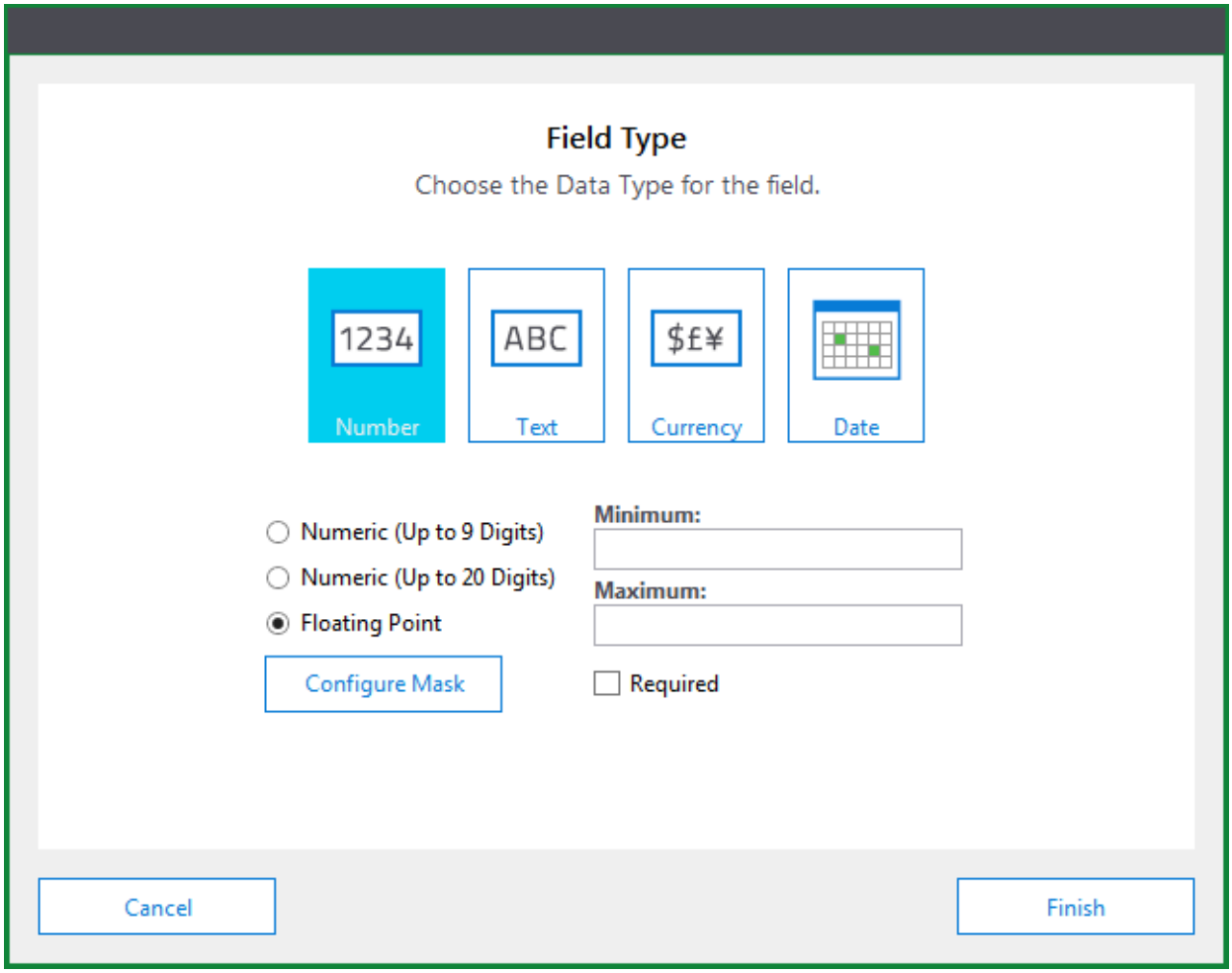
3. To select the data type associated with the field, click the edit button next to the Data Type property field.



4. Select the data type for the field. You can select **Number**, **Text**, **Currency**, or **Date**.
5. Click **Finish**.

To add Keyword Type fields to a form template, place the appropriate **Keyword** control on the form.

Formatting Paragraph Fields and Field Labels

You can format text in Paragraph fields and field labels, when the edit button is available.

To format a Paragraph field or a Label for a field:

1. Select the field you want to format in the Designer.
2. In the **Properties** pane, click the edit button next to the **Content** field or **Label** field.

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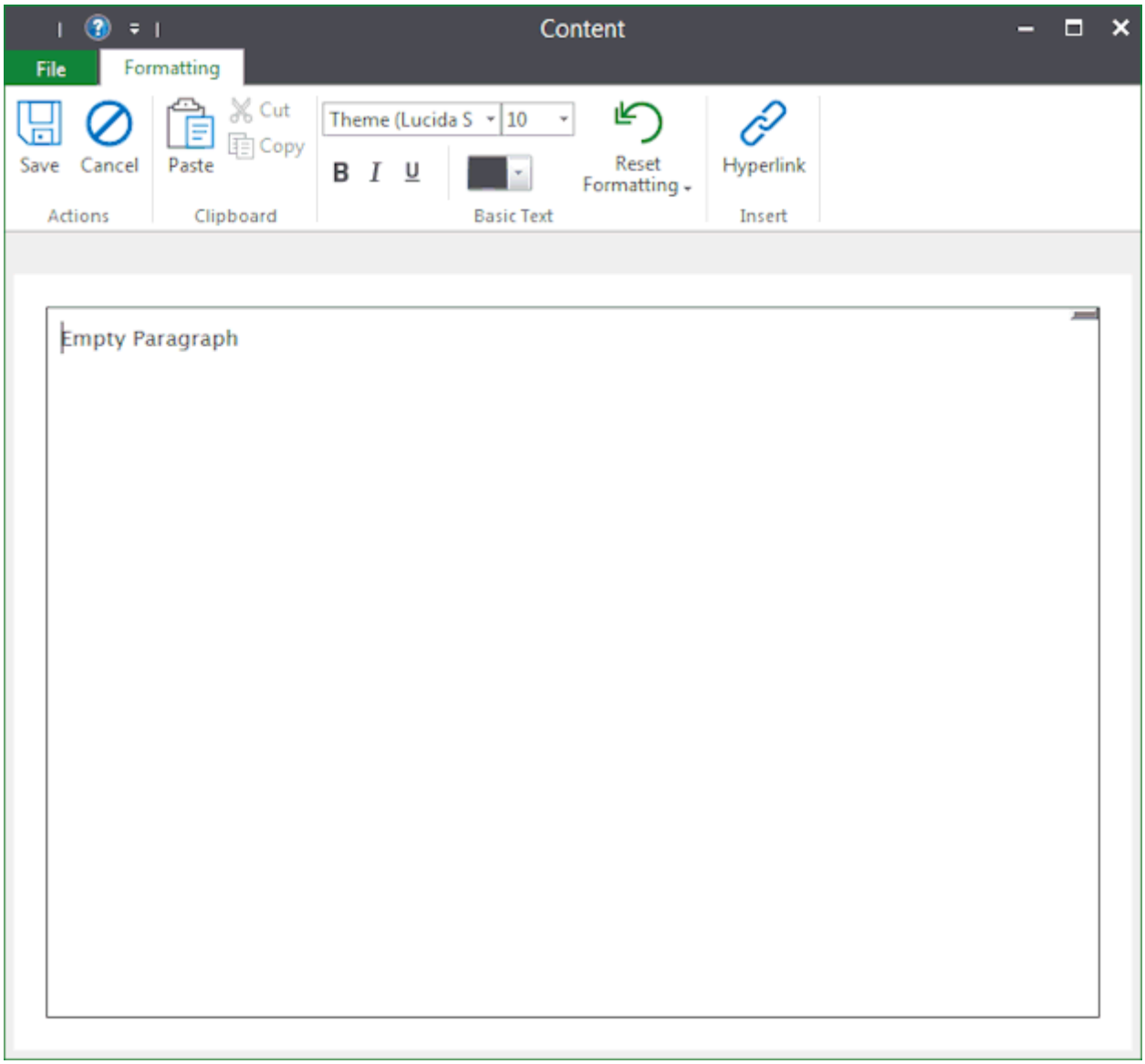
3. The **Content** dialog box or **Label** dialog box is displayed.



4. In this dialog box, you can enter the text you want to include in the paragraph field and use the **Formatting** ribbon to format the text appropriately. See Formatting Options on page 54 for information about the formatting options,
5. When text is formatted as desired, click **Save**. You can also click **Cancel** to discard your changes.

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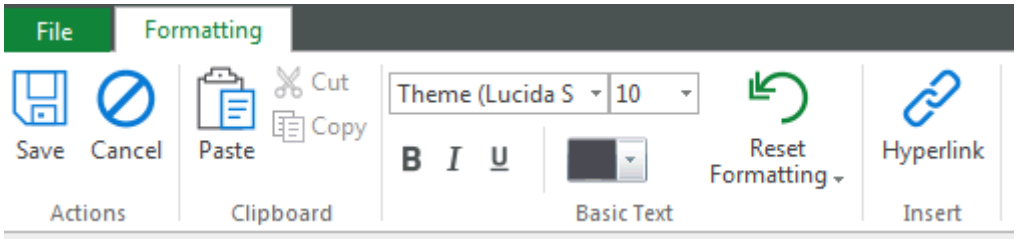
Formatting Options

Within the **Formatting** ribbon, there are several formatting options you can use for text for Paragraph controls and the labels of many other control types.



Using the Clipboard

In the **Clipboard** group, click **Paste** to paste information that you have copied to the field. Likewise, you can **Cut** or **Copy** text from the field.

Formatting Text

In the **Basic Text** group, you can select the font from the first drop-down list and you can select the font size from the second drop-down list.

You can select text and apply **Bold**, **Italic**, and/or **Underline** formatting using the appropriate button(s). You can also select the color of the selected text from the third drop-down list.

You can reset the text back to its default font, size, and color using the **Reset Formatting** menu.

To return to the default font, size, and color, click the **Reset Formatting** button or select **Reset Formatting | Reset Formatting**.

To reset only the font use to the default font, select **Reset Formatting | Reset Font**.

To reset only the size of the text to the default size, select **Reset Formatting | Reset Font Size**.

To reset only the color of the text to the default color, select **Reset Formatting | Reset Font Color**.

The default font, size, and color is determined by the configuration of the theme part from which the control is formatted.

Note: If bold, italic, or underline is applied to text, resetting formatting will not remove these text properties. You must select the text and then toggle the **Bold**, **Italic**, or **Underline** button to off to remove this type of formatting.

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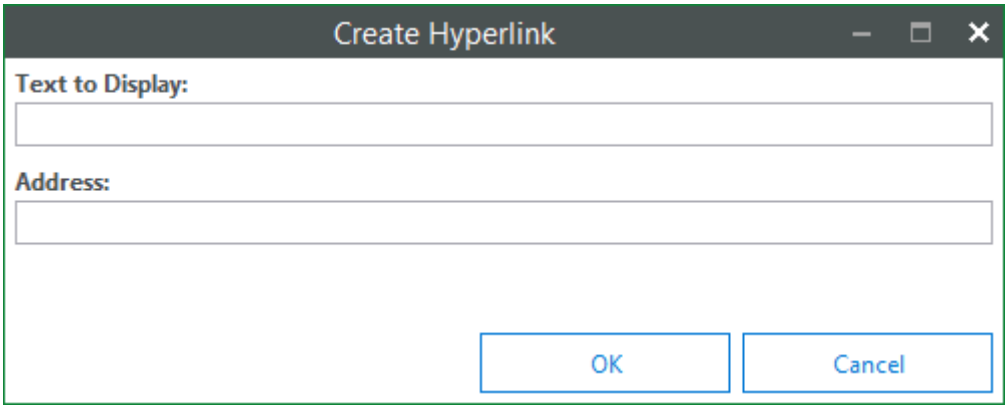
Inserting Hyperlinks

You can insert a hyperlink in the text. To insert a hyperlink:

1. Click the **Hyperlink** button or right-click in the text field and selecting **Create Hyperlink**. The **Create Hyperlink** dialog box is displayed.



2. Enter the text that you want to display in the **Text to Display** field.
3. Enter the URL you want the hyperlink to open in the **Address** field.
4. Click **OK**.

Note: The following are valid hyperlink schemes: http, https, file, mailto, onbase, onbasemobile, and upop.

Formatting Shortcuts

The following shortcuts keys are available when formatting text in a paragraph or label:

Shortcut	Description
Ctrl + C	Copies selected text.
Ctrl + V	Pastes copied text.
Ctrl + X	Cuts selected text.
Ctrl + U	Underlines selected text.
Ctrl + B	Applies bold to selected text.
Ctrl + I	Applies italic to selected text.
Ctrl + H	Opens the **Create Hyperlink** dialog box to create a hyperlink.

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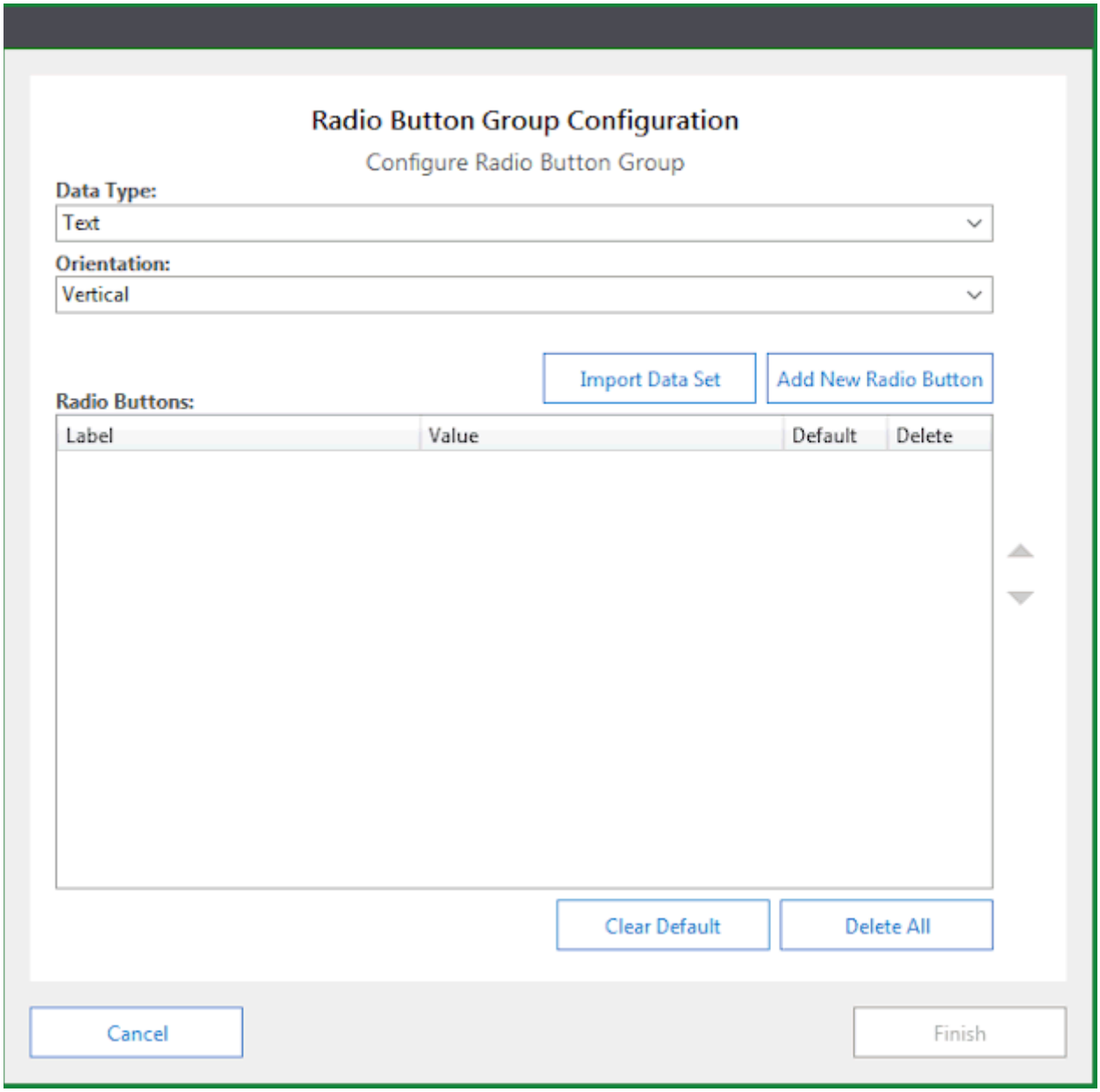
Configuring Radio Button Groups

Radio Button Groups can be configured to have specific values associated with the radio button options. To configure a Radio Button Group:

1. Select the **Radio Button Groups** control in the toolbox and drag it to the location in the form where you want it to be inserted and release the mouse click. The **Configure Radio Button Group** dialog box is displayed.



2. Select the **Data Type** that will be associated with the Radio Button Group from the drop-down list.

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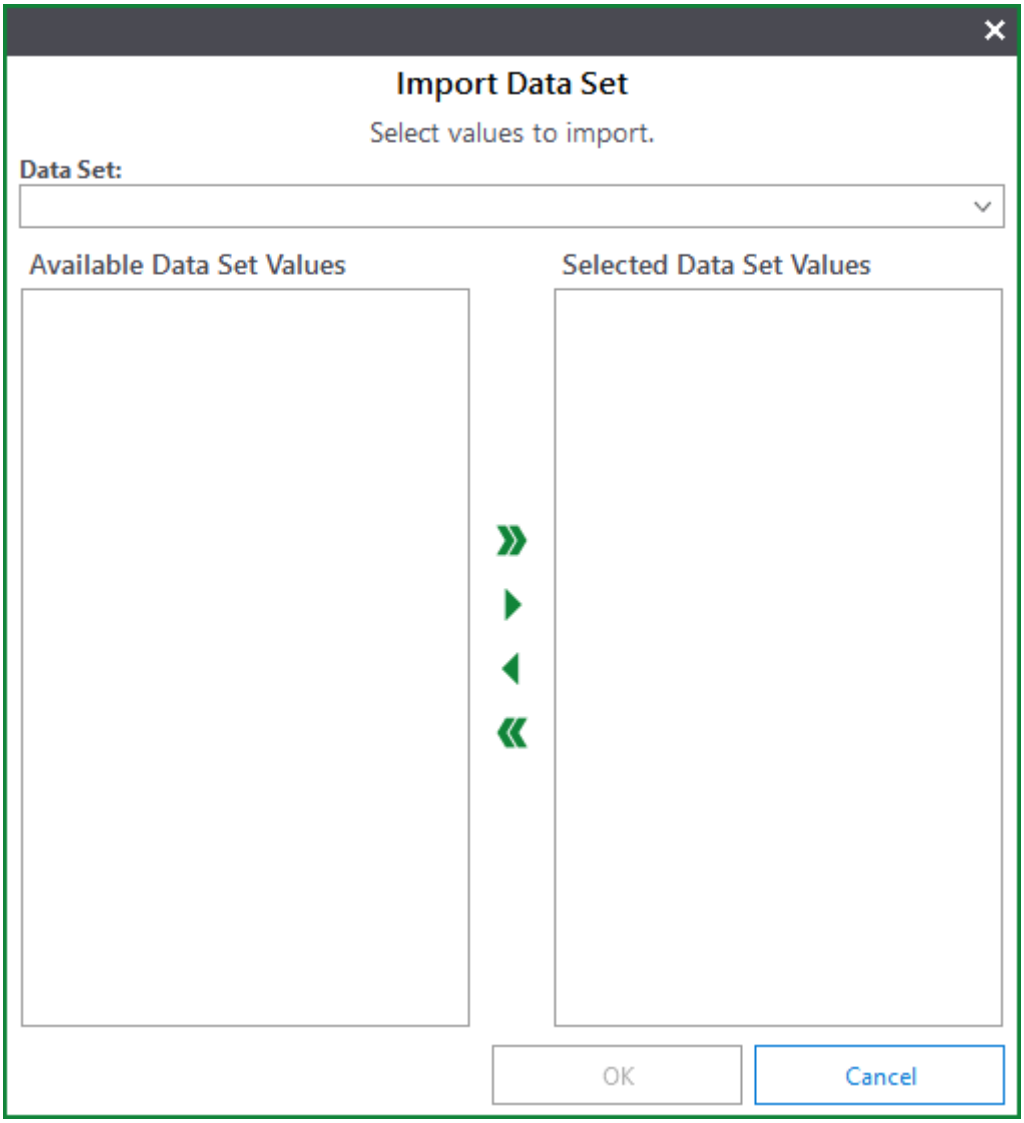
3. Select the **Orientation** for the radio buttons from the drop-down list. You can choose to orient them vertically or horizontally.
4. If you have a Unity Forms data set configured that you would like to use the values as radio button selections, click **Import Data Set**.



Select the appropriate **Data Set** from the drop-down list. The values configured in the selected data set are displayed for selection in the **Available Data Set Values** box.

You can select specific values and click **Add Selected Items** or you can click **Add All Items** to select all values in the data set for the radio button group. You can remove selected values by selecting the value(s) and clicking **Remove Selected Items** or remove all values by clicking **Remove All Items**.

Click **OK**. The values will be added as **Radio Buttons**.

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5. You can also configure radio buttons manually. To add a radio button manually, click **Add New Radio Button**. A new radio button is added to the **Radio Buttons** table.

   Double-click under the **Label** column. Enter the label you want to use for the radio button.

   Double-click under the **Value** column. Enter the value you want associated with the radio button group when the radio button is selected.

Note: Values are case insensitive.

   If you want to specify a radio button that is selected by default, select the corresponding radio button under the **Default** column.
6. You can order radio buttons by selecting a radio button and clicking the up and down arrow buttons. You can delete a radio button by clicking the corresponding **X** button. You can clear the radio button configured as the default by clicking **Clear Default**. You can delete all of the radio buttons by clicking **Delete All**.
7. When you are done configuring the radio button group, click **Finish**.

Note: If multiple radio buttons in the group have the same value, when a form is submitted and reopened, the first instance of the value will be selected regardless of the radio button that was originally selected. This will occur regardless of if the value is configured as the default value.

Note: When a radio button value is set via the Set Field Value action or the API and the value that is being set does not correspond to an available radio button value, the current value is not overwritten.

Note: If a Radio Button Group is backed by a masked Keyword Type, the radio button values must be unmasked strings.

AutoFill Keyword Sets in Unity Forms

AutoFill Keyword Set configuration is simple. All that is needed is to select an AutoFill Keyword Type Set for a primary Keyword Type from a drop-down list. All Keyword Types belonging to a AutoFill Keyword Set are automatically filled with values when the primary value is entered and **Tab** is pressed.

Note: Unity Forms configured as Workflow forms function as existing Unity Forms do. When using Unity Forms in a Workflow process, if the form inherits a keyword value from a work item and the value is for a primary Keyword Type within an AutoFill Keyword Set, the AutoFill will not be expanded.

Any AutoFill Keyword Set that is configured in OnBase can be used. This includes AutoFill Keyword Sets that are linked to external data sources. For more information about AutoFill Keyword Sets, please see the AutoFill Keyword Sets Module Reference Guide or help files.

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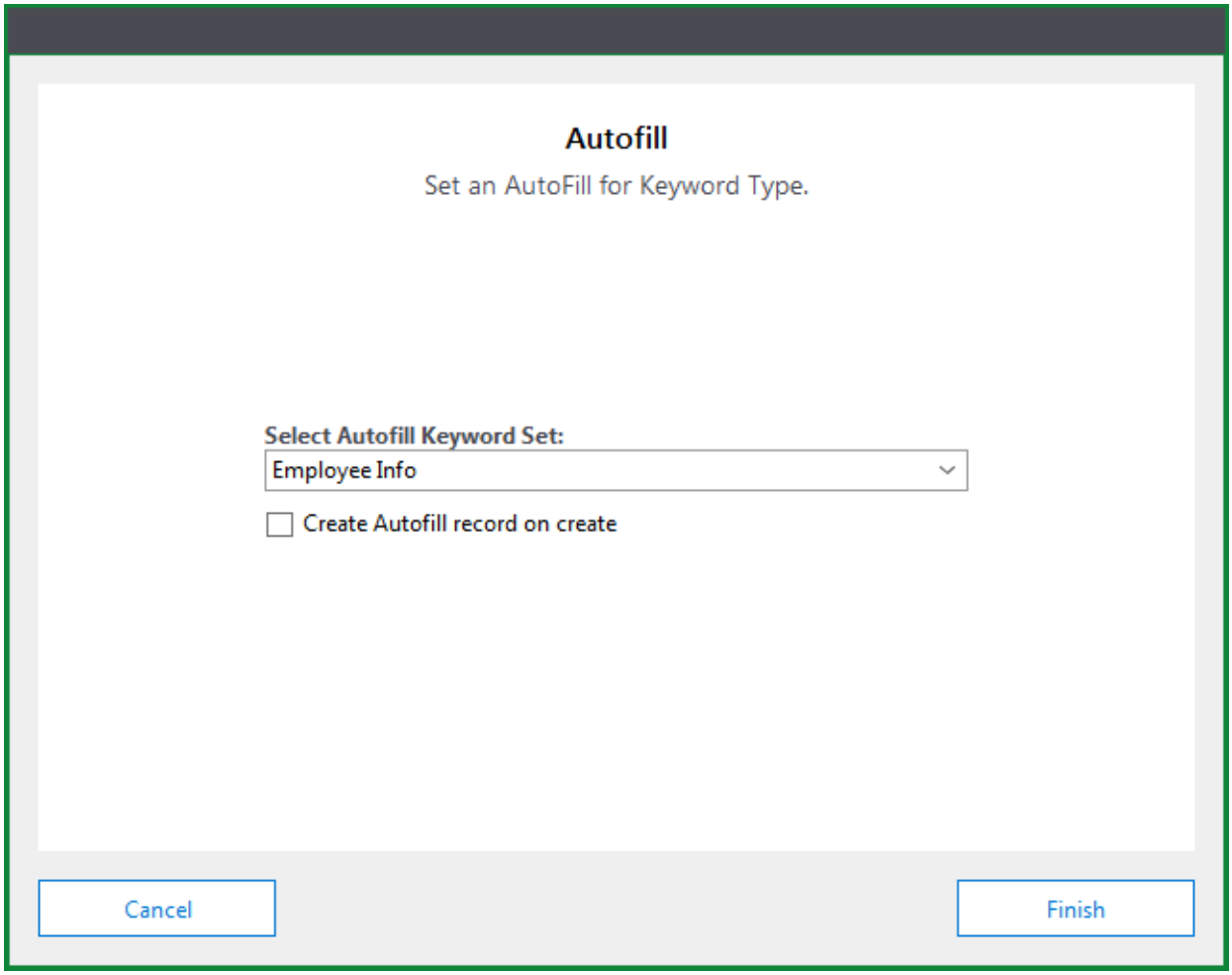
Configuring AutoFill Keyword Sets on a Form

To configure an AutoFill Keyword Set on a form:

1. In the Designer, place the Keyword Types that are a part of the AutoFill Keyword Set on the form.
2. Select the primary Keyword Type field.
3. In the **Properties** pane, select the edit button next to the **Autofill** property.



4. On the **AutoFill Keyword Set** screen, select the appropriate AutoFill Keyword Set from the **Select AutoFill Keyword Set** drop-down list.
5. With the **Create Autofill record on create** option selected, when a new form of this form template type is created and the primary value entered does not exist in the associated AutoFill Keyword Set, a new AutoFill Keyword Set record will be created for the primary value.
6. Click **Finish**.

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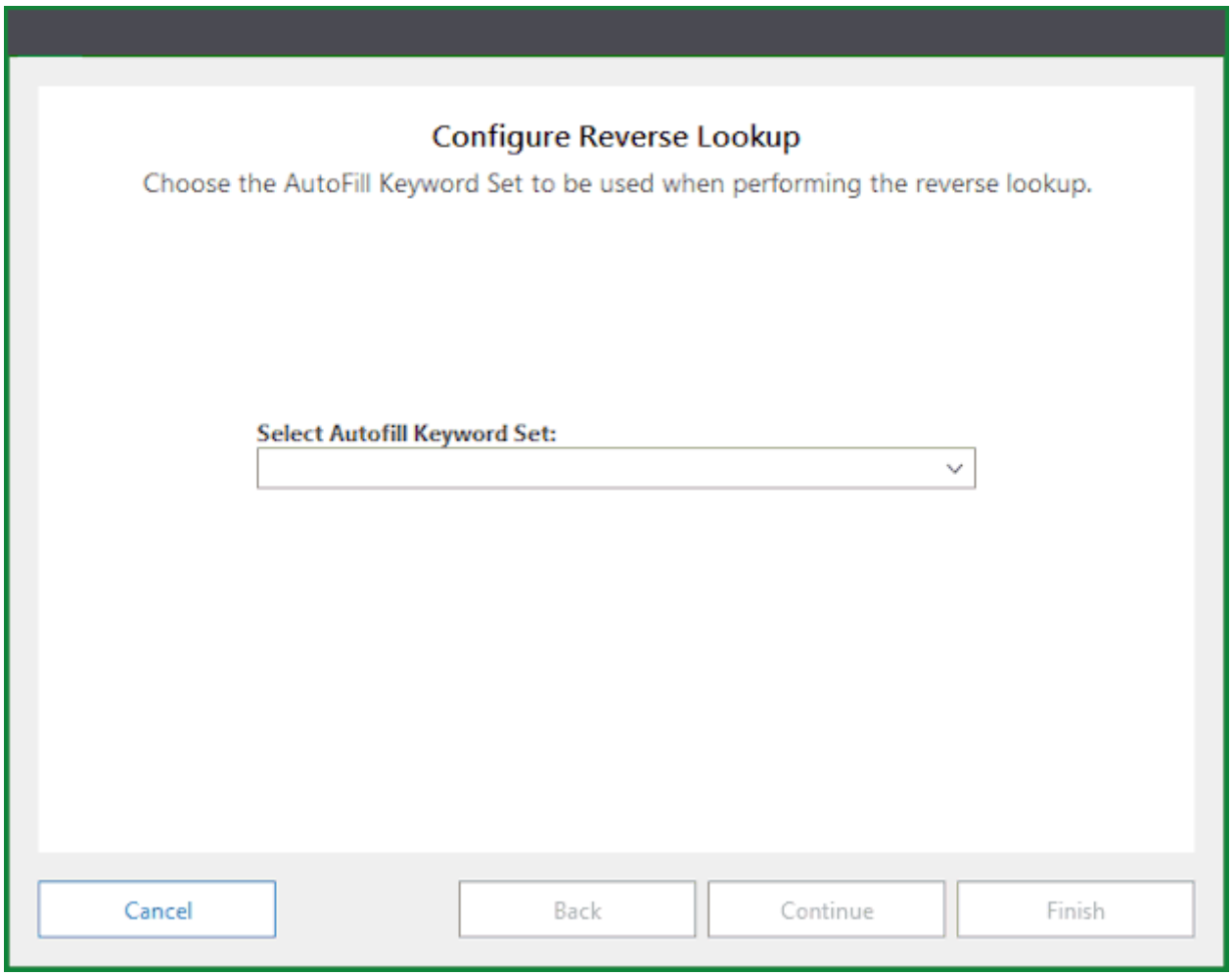
Configuring Lookup Buttons

If you want users to be able to find an AutoFill Keyword Set based on specific values associated with the set other than the primary value, you can configure a lookup button. To configure a lookup button:

1. In the Designer, place the **Lookup Button** control on the form.

Note: The **Lookup Button** can only be placed in repeating sections or tables when the repeating section or table contains fields from a Multi-Instance Keyword Type Group that is associated with an AutoFill Keyword Set.

2. Select the lookup button in the form.
3. In the **Properties** pane, select the edit button next to the **Reverse Lookup Configuration** property.



4. Select the AutoFill Keyword Set you want to be associated with the button from the **Select Autofill Keyword Set** drop-down list. Only AutoFill Keyword Sets that correspond to the Document Type your form belongs to are displayed for selection.

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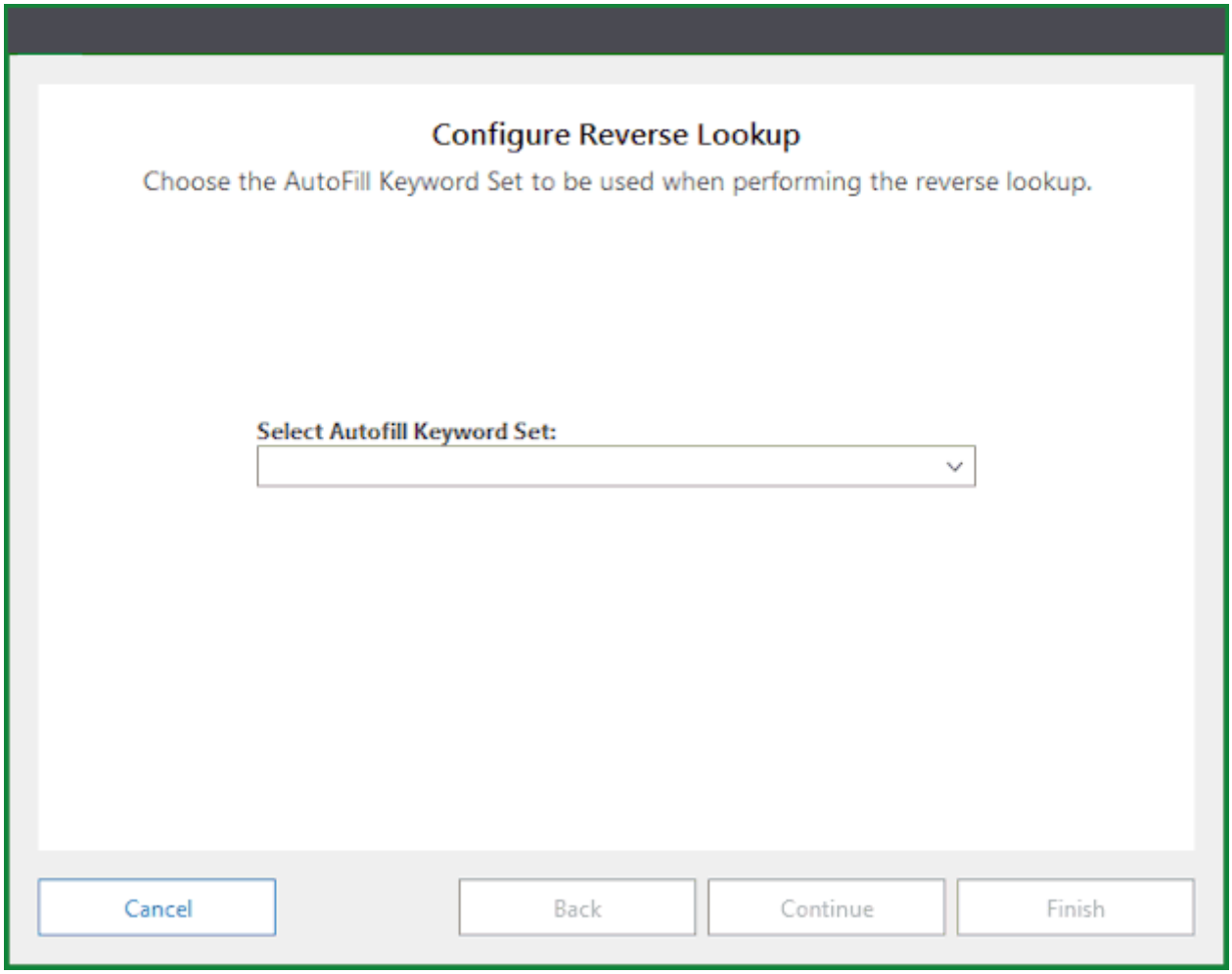
5. Click **Continue**.



6. Uncheck the check box(es) next to the Keyword Type(s) you do not want to allow users to lookup by. By default, all Keyword Types listed are selected to be used in the lookup.
7. Click **Finish**.

Note: If a lookup button is not configured correctly, you cannot test drive or publish the form until the lookup button configuration is corrected.

Tip: If you want to visually indicate to users what fields are designated lookup fields, configure the field color settings for lookup fields in the Theme Designer. See Theme Designer on page 128 for more information.

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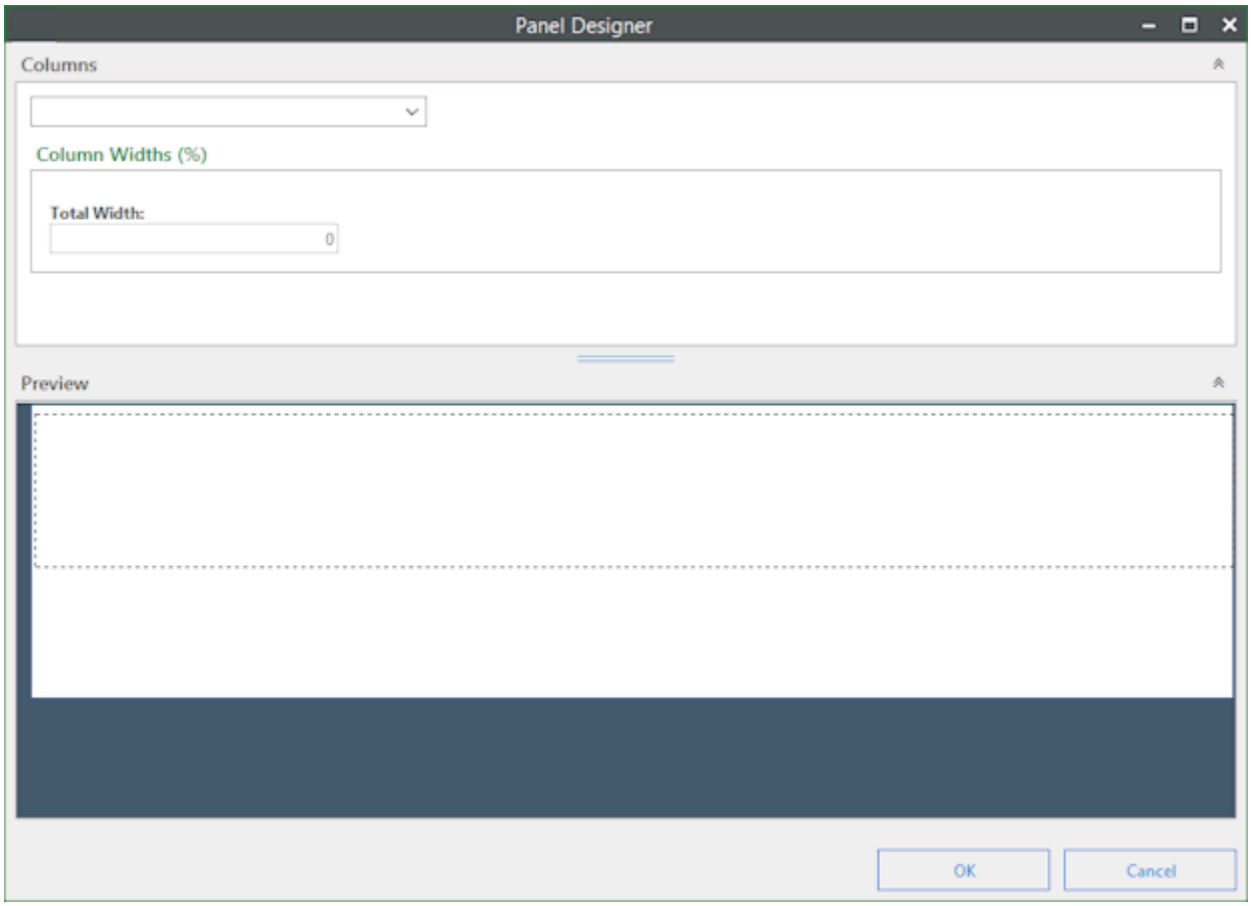
Auto Number Keyword Types

Auto number Keyword Types can be placed on a Unity form. The Keyword Type must be configured appropriately for auto incrementing in Configuration module. See the System Administration documentation for more information.

Configuring Panels

When a panel is created, the default number of columns is one. You can configure a panel to have multiple columns in a form. To configure a panel for multiple columns:

1. In the **Designer**, select a panel within the form.
2. In the **Properties** pane, click the edit button next to the **Columns** property.



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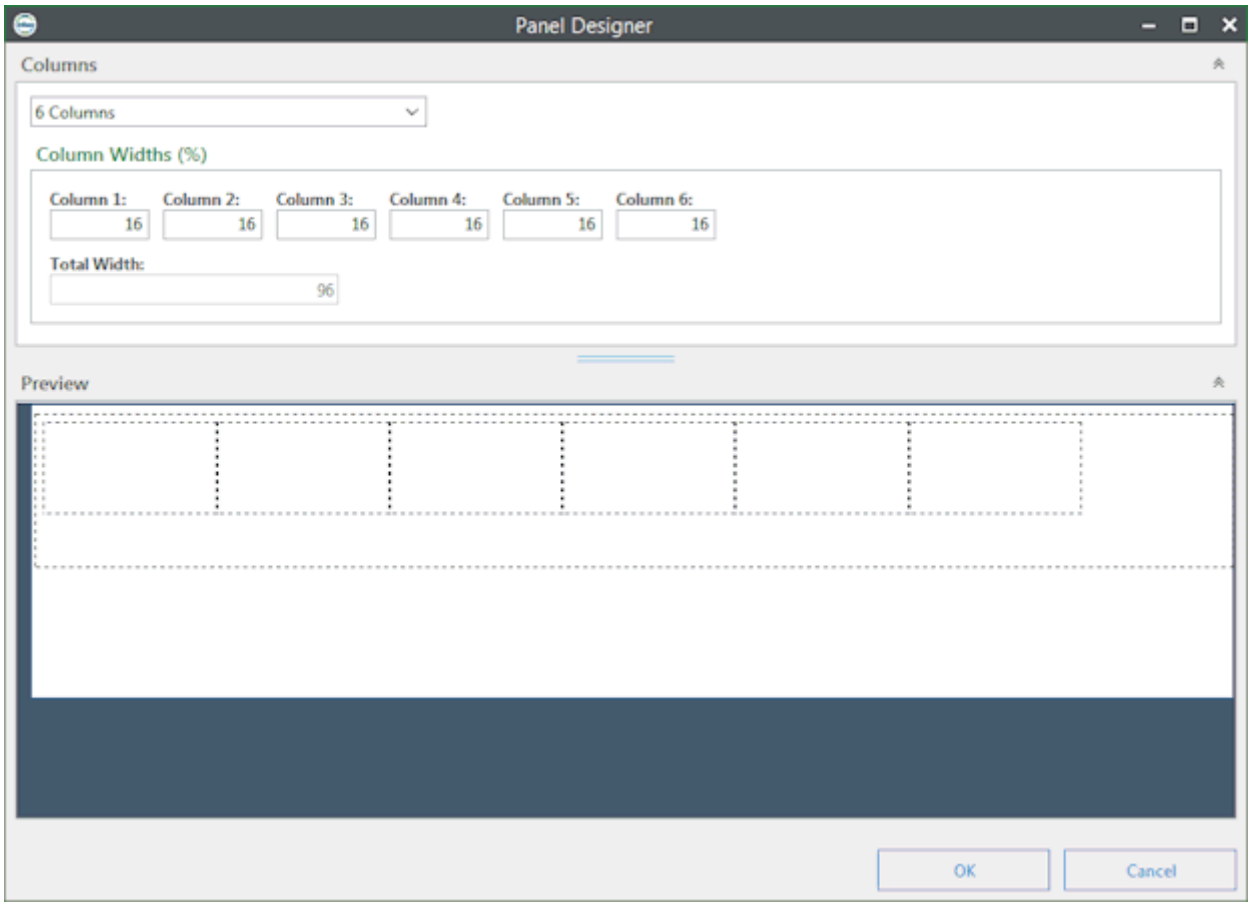
3. Select the number of columns you want the panel to contain from the drop-down list. You can configure the panel to have 1 to 10 columns. Upon selecting a number of columns, fields to configure the width of the columns is displayed.



4. Enter the percentage of the total width of the panel that you want each column to occupy in each column's field. The **Total Width** field automatically calculates the percentage of the panel that the columns occupy and must total less than or equal to 100 percent. A preview of your column configuration is displayed.

Note: If you add additional columns after initially picking a smaller number of columns, the existing columns will maintain their configured width and the **Total Width** field may be over 100 until you modify the column widths to be in range.

5. When you are done configuring the number and width of the columns in a panel, click **OK**.

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Configuring Columns

Once you have defined the number of columns in a panel, you can define how you want the column formatted. To format a column:

1. Select the column within the panel that you want to format.
2. In the **Properties** pane, select the appropriate **Orientation**. You can select **Horizontal** to allow fields to be placed side by side across the column. You can select **Vertical** to allow fields to be placed beneath each other down the column. This setting also controls the tab direction within the column. Tabbing will either move horizontally or vertically, depending on the option you select.

Duplicating Panels

You can make a panel with a duplicate configuration within a form. To duplicate a panel:

1. Select the panel within the form.
2. In the **Properties** pane, click the **Duplicate Panel Layout** button. A duplicate of the panel will be inserted into the form.

Note: This will only duplicate the configuration of the panel and columns. It will not duplicate anything placed within the panel or columns.

Using Repeating Sections and Tables

Repeating sections and tables can be used outside of the scope of Multi-Instance Keyword Type Groups. Other controls that are not tied to Keyword Types can be formatted and organized using repeating sections and tables.

Repeating sections can contain check boxes, multiline text boxes, panels, paragraphs, sections, and text boxes. Repeating sections can be placed within panels, sections, and the body of the form.

Tables can contain text boxes, multiline text boxes, and check boxes. Tables can be placed within panels, sections, and the body of the form.

Adding controls to repeating sections and tables allow users to create multiple instances of the controls.

Configuring Field Validation

You can configure validation of a field by selecting the field and clicking on the edit button next to the **Data Type** property in the **Properties** pane. Each data type has different validation options.

All data types can be set to be required by selecting the **Required** check box.

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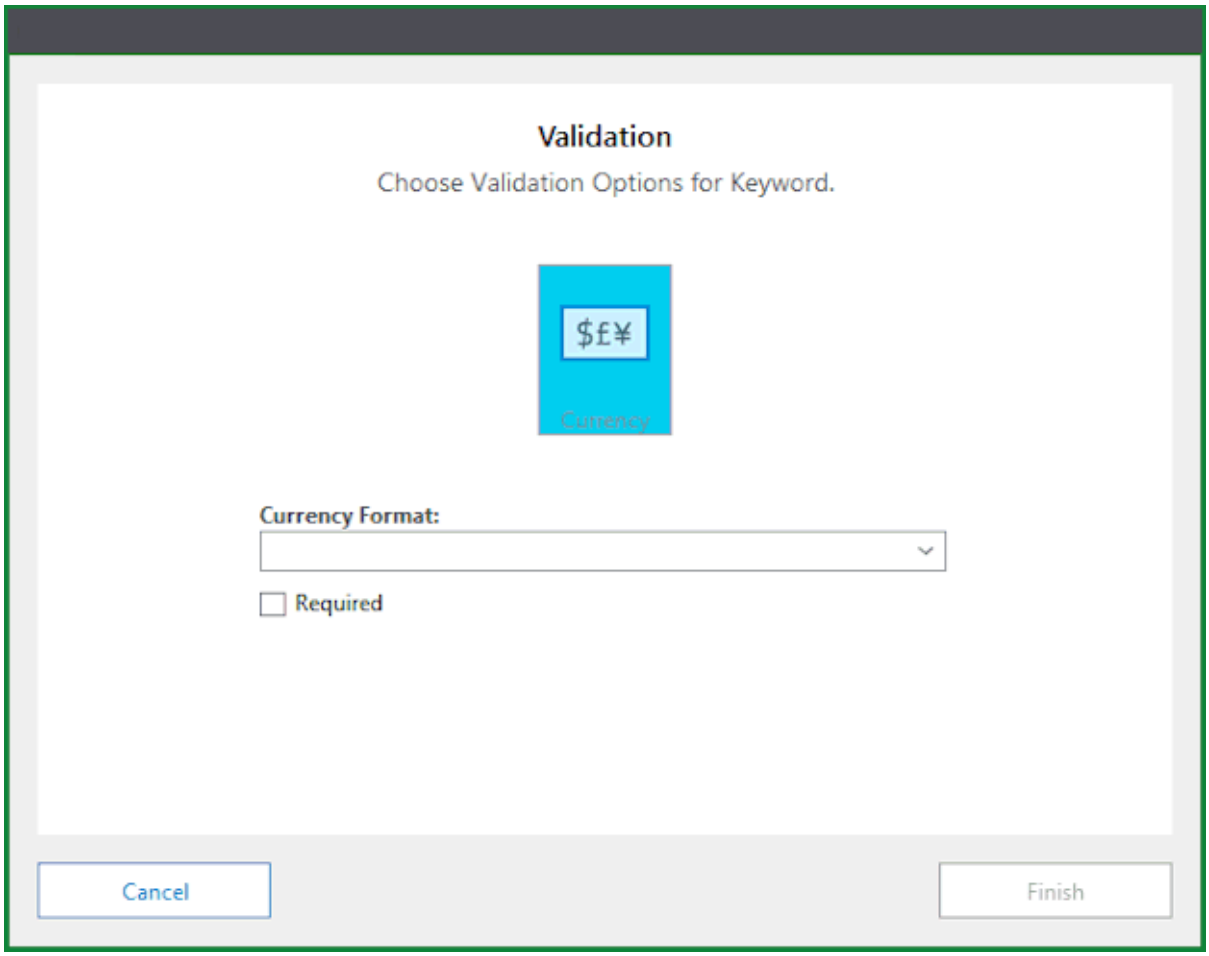
Currency Fields



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Currency fields pull the currency format directly from the configuration of the Keyword Type in the Configuration module. A currency format must be assigned to a field. When a certain format is not specified at the Keyword Type level, a **Currency Format** must be selected from the drop-down list to associate a currency format to the field. The currency formats available in the drop-down list are the currency formats configured in the Configuration module. Alternately, the **Currency Format** property can be configured in the **Properties** pane to define the appropriate currency format.

Caution: When using the **Create Autofill record on create** option, if a currency Keyword Type is used, the currency format assigned to the form field must exactly match the currency format configured at the Keyword Type level in order for the currency value to be a valid value for future use in forms. In addition, secondary Keyword Types that use a currency format within an AutoFill Keyword Set must also match the currency format configured in the form for that Keyword Type or the value will be invalid. This means that if a Keyword Type is configured to use **Workstation Regional Settings** and a field is set to use a certain currency format, the current value stored will not be a valid value.

Caution: Specific currency-formatted Keyword Types are not supported in Unity Forms.

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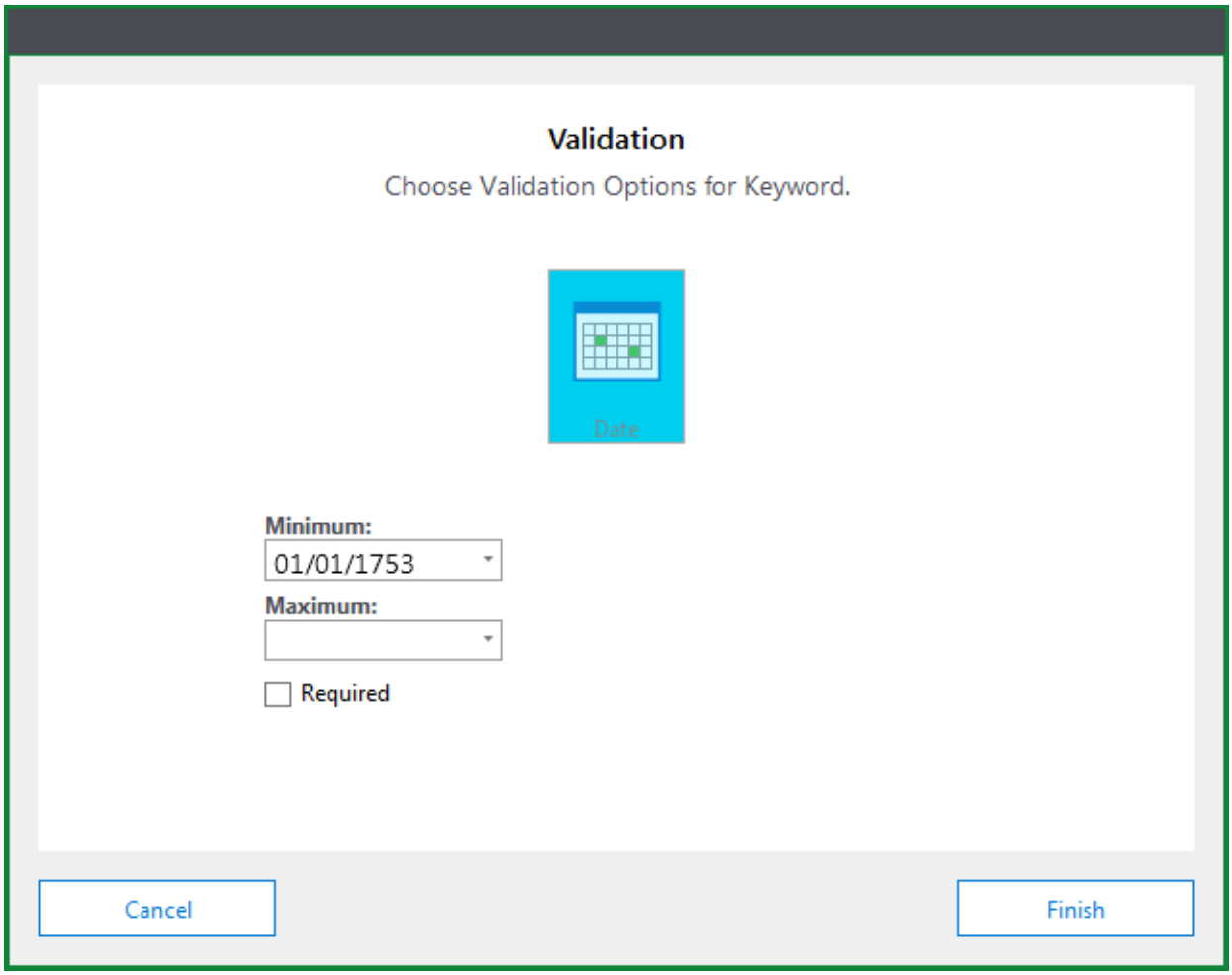
Date Fields



Date fields can be configured to only accept a date from within a configured date range. In the **Minimum** field, enter the earliest day that can be entered in the field in the Client. In the **Maximum** field, enter the latest date that can be entered in the field in the Client. If a date does not fall between the **Minimum** and **Maximum** date values, the date cannot be entered into the field in the Client. Blank fields are still valid.

Note: When configuring a field associated with a Date Keyword Type, a **Minimum** date of 1/1/1753 is displayed. This is displayed because it is the absolute minimum date that can be entered in the system.

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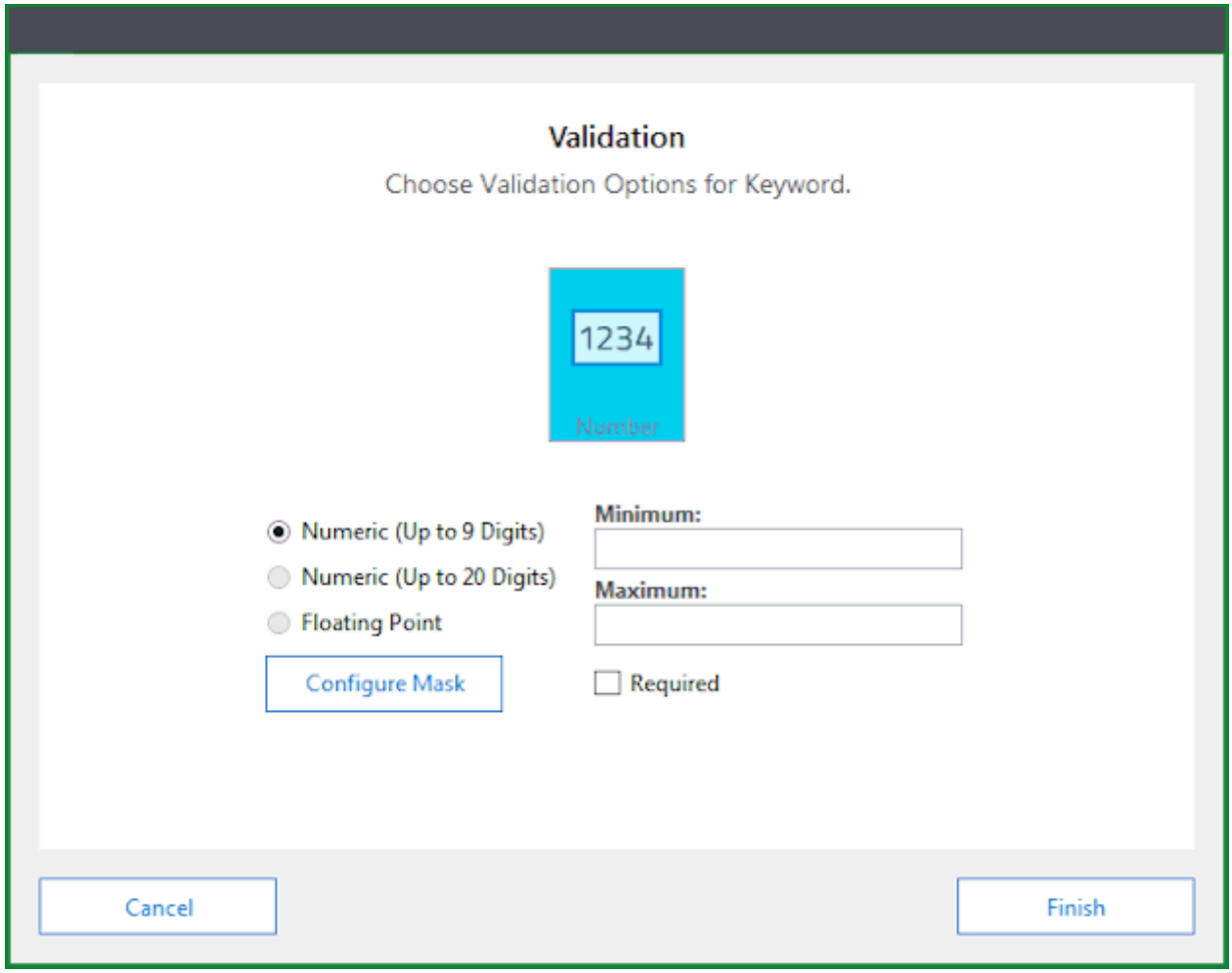
Numeric Fields



For a numeric field, the **Numeric (Up to 9 Digits), Numeric (Up to 20 Digits),** or **Floating Point** radio button indicates the type of numeric field that is selected.

In the **Minimum** field, you can enter the minimum value that can be entered in the field in the Client.

In the **Maximum** field, you can enter the maximum value that can be entered in the field in the Client.

Note: Decimals can only be entered when using **Floating Point**. Floating point **Minimum** and **Maximum** values can have up to 6 decimal places.

Note: The **Minimum** and **Maximum** options are not available for Multiline Text Box configuration.

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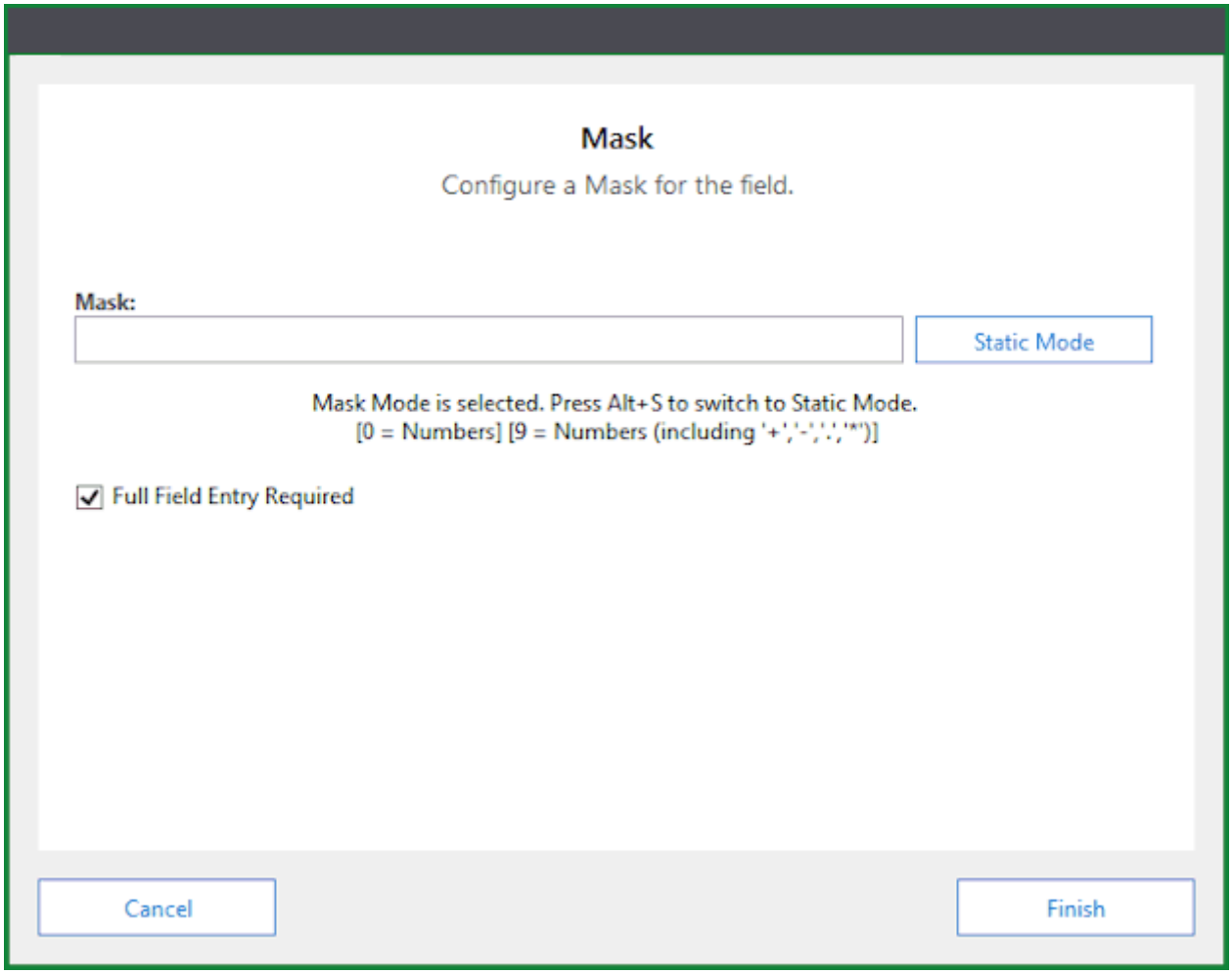
If you want to configure masking, click the **Configure Masking** button. The following screen is displayed:



In Mask Mode, characters to represent the type of data that is allowed to be entered in the Client. Character placeholders that are entered in Mask Mode are black during configuration.

The following key characters are used for masking in Mask Mode:

Key Character	Usage
A	The expected character is alphabetic.
X	The expected character is alphanumeric.
0	The expected character is numeric.
9	The expected character is numeric with a possibility of a special symbol (+, -, ., *).

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In Static Mode, enter specific characters that will be used as a mask in the Client. The characters entered will be the exact characters displayed in the Client. Characters entered in Static Mode will display in blue during configuration.

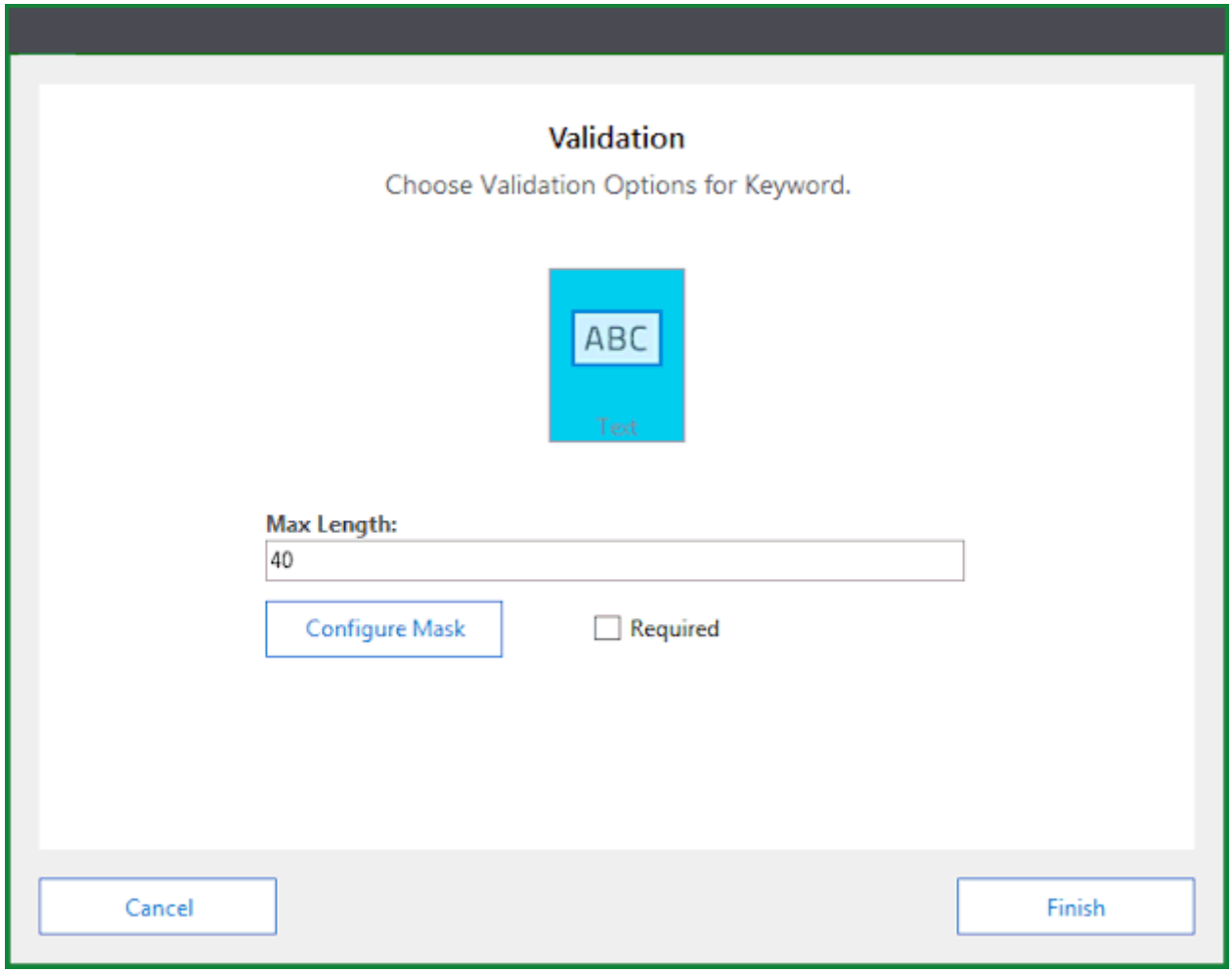
Note: Masking formats should match the mask format configured for the Keyword Type in the Configuration module.

Note: The **Mask** option is not available for Check Box and Multiline Text Box configuration.

If you want to require that values entered adhere to the formatting and character requirements specified in the mask, select **Full Field Entry Required**.

Note: When **Full Field Entry Required** is selected, spaces cannot be entered in a numeric field. If the **Full Field Entry Required** option is not selected, spaces can only be entered at the end of a numeric field.

Alphanumeric Fields



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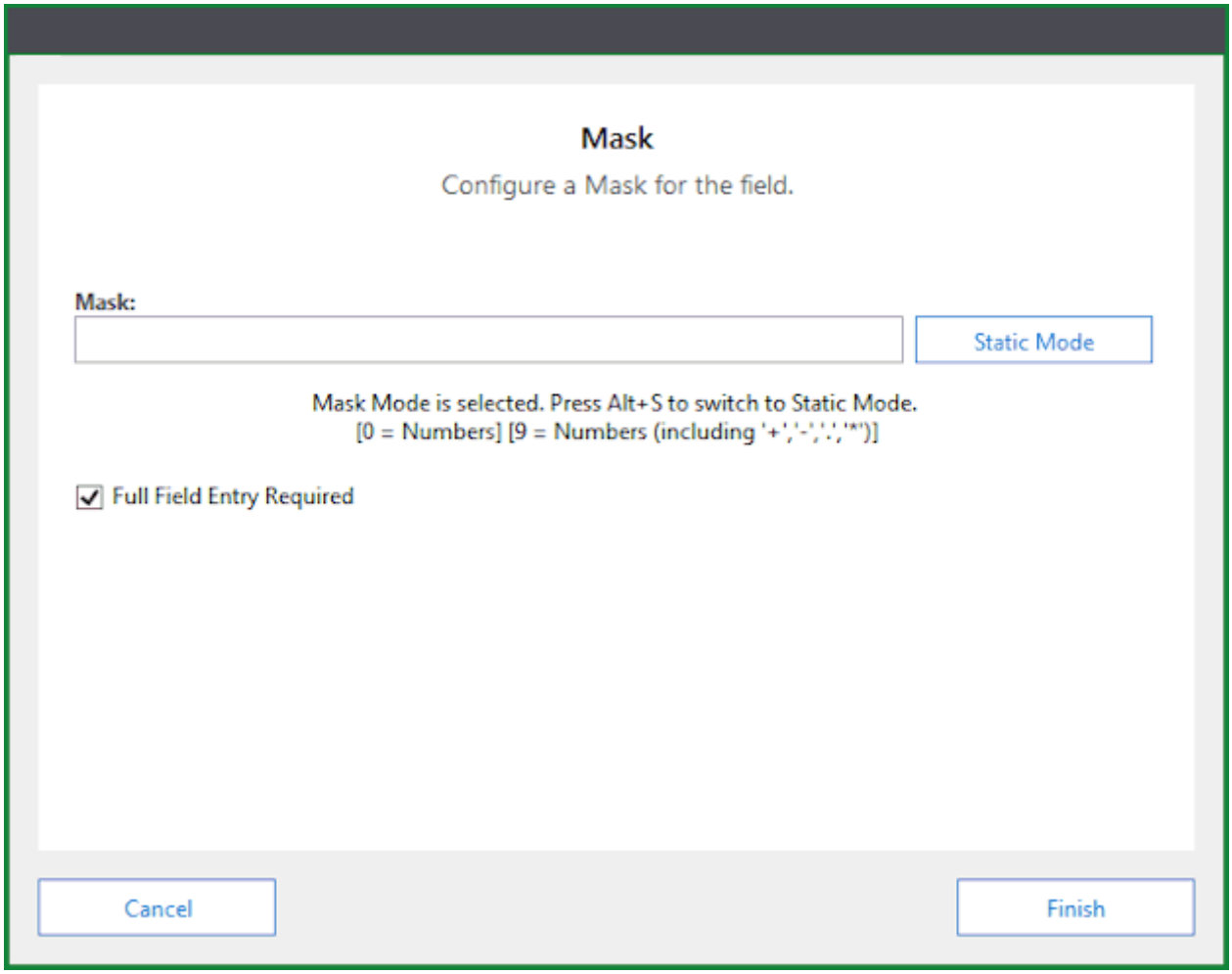
When configuring alphanumeric Keyword Type fields, you can specify the maximum number of characters for a field in the **Max Length** field. This value cannot exceed the maximum characters allowed for the Keyword Type.

Note: Non-keyword multiline fields have a default value of 0, which means the characters are unlimited. If you want to set a character as limited, specify a value for the **Max Length** property.

Note: If the field has masking configured, the number of characters is limited at the time of submission.

Note: The **Max Length** option is not available for Check Box field configuration.

Masking can be configured by clicking the **Configure Mask** button. The **Mask** screen is displayed.



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Masking can be toggled using the **Static Mode**/**Mask Mode** buttons. In addition, the entry mode can be changed by pressing **Alt + s** on the keyboard. In order to successfully configure masking for a field, you must toggle back and forth between Mask Mode and Static Mode to enter all of the necessary character placeholders in the proper format.

In Mask Mode, characters represent the type of data that is allowed to be entered in the Client. Character placeholders that are entered in Mask Mode are black during configuration.

The following key characters are used for masking in Mask Mode:

Key Character	Usage
A	The expected character is alphabetic.
X	The expected character is alphanumeric.
0	The expected character is numeric.
9	The expected character is numeric with a possibility of a special symbol (+, -, ., *).

In Static Mode, enter specific characters that will be used as a mask in the Client. The characters entered will be the exact characters displayed in the Client. Characters entered in Static Mode will display in blue during configuration.

Note: Masking formats should match the mask format configured for the Keyword Type in the Configuration module.

Note: The **Mask** option is not available for Check Box and Multiline Text Box configuration.

If you want to require that values entered adhere to the formatting and character requirements specified in the mask, select **Full Field Entry Required**.

Note: When the **Full Field Entry Required** option is selected, spaces cannot be entered at the end of an alphanumeric field.

Click **Finish** when the mask is appropriately configured.

Configuring Values for Check Box Fields

A value can be associated with a check box. When the check box is checked, the value configured for the field is associated with the check box on the form. If the check box is not checked, no value is associated with the field on the form.

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Once a check box has been placed on a form, you can configure the value associated with it. To configure a value for a check box:

1. Select the check box on the form.
2. In the **Properties** box, enter the value you want to associate with the check box when the check box is checked in the **Checked Value** field.
3. Click **Ok**.

Setting Default Values for Check Box Fields

You can configure the default value that a check box field has upon creating a form. To configure a default value for a check box:

1. Select the check box on the form.
2. In the **Properties** box, enter the value of **Check Value** property in the **Default Value** property field if you want the check box to be selected by default. Entering any other value will leave the check box not selected by default.

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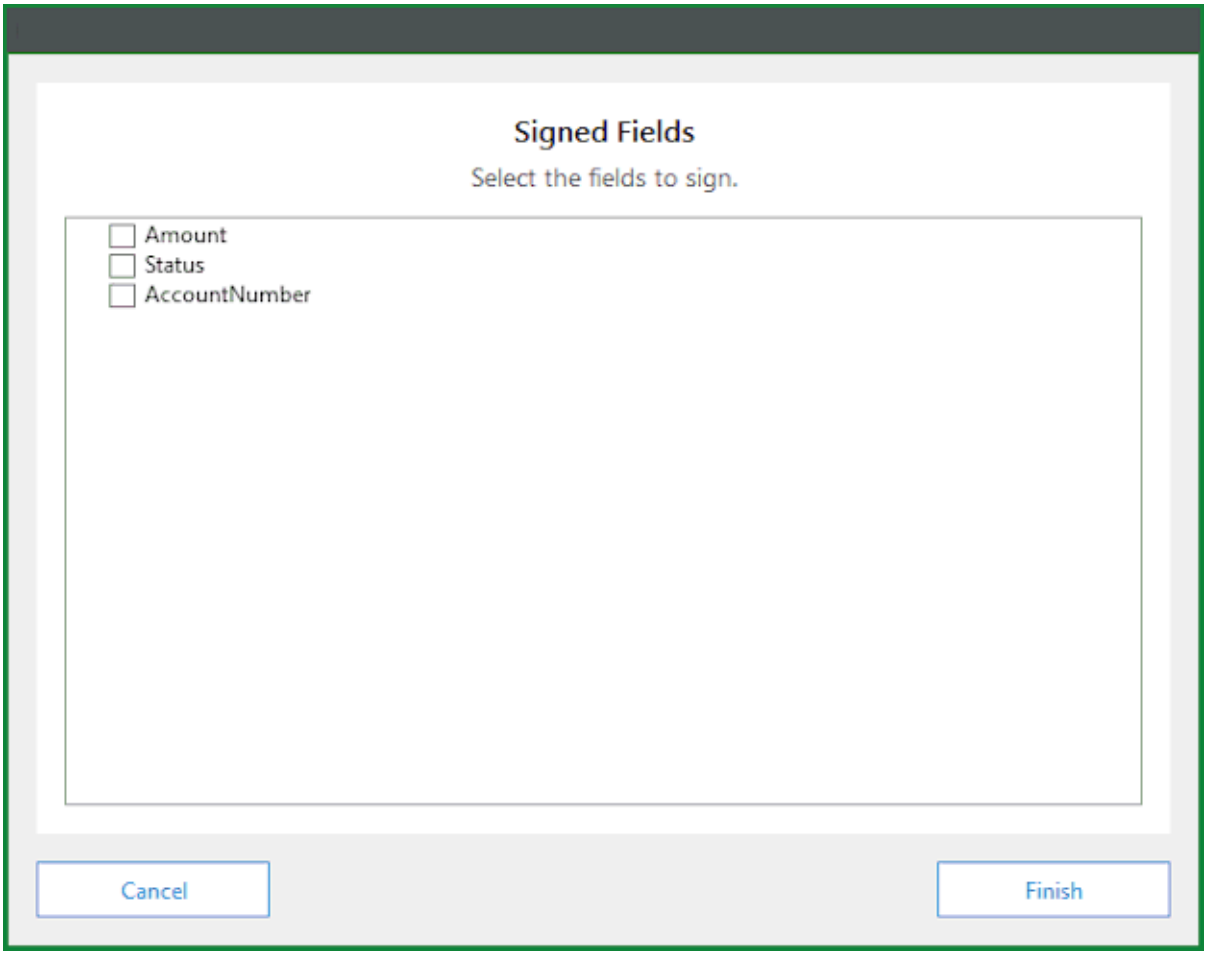
Configuring a Signature Field

You can specify what fields are validated by a signature field. To configure a signature field:

1. After inserting the signature field the from the **Toolbox** window, select the signature field.
2. In the **Properties** pane, click the edit button next to **Configure Signed Fields**. The **Signed Fields** screen is displayed.



3. Select the check box(es) next to the fields that you want to designate as signed fields and associate with the signature. If changes are made to designated signed fields after the form is signed, the signature will be invalid.
4. Click **Finish**.

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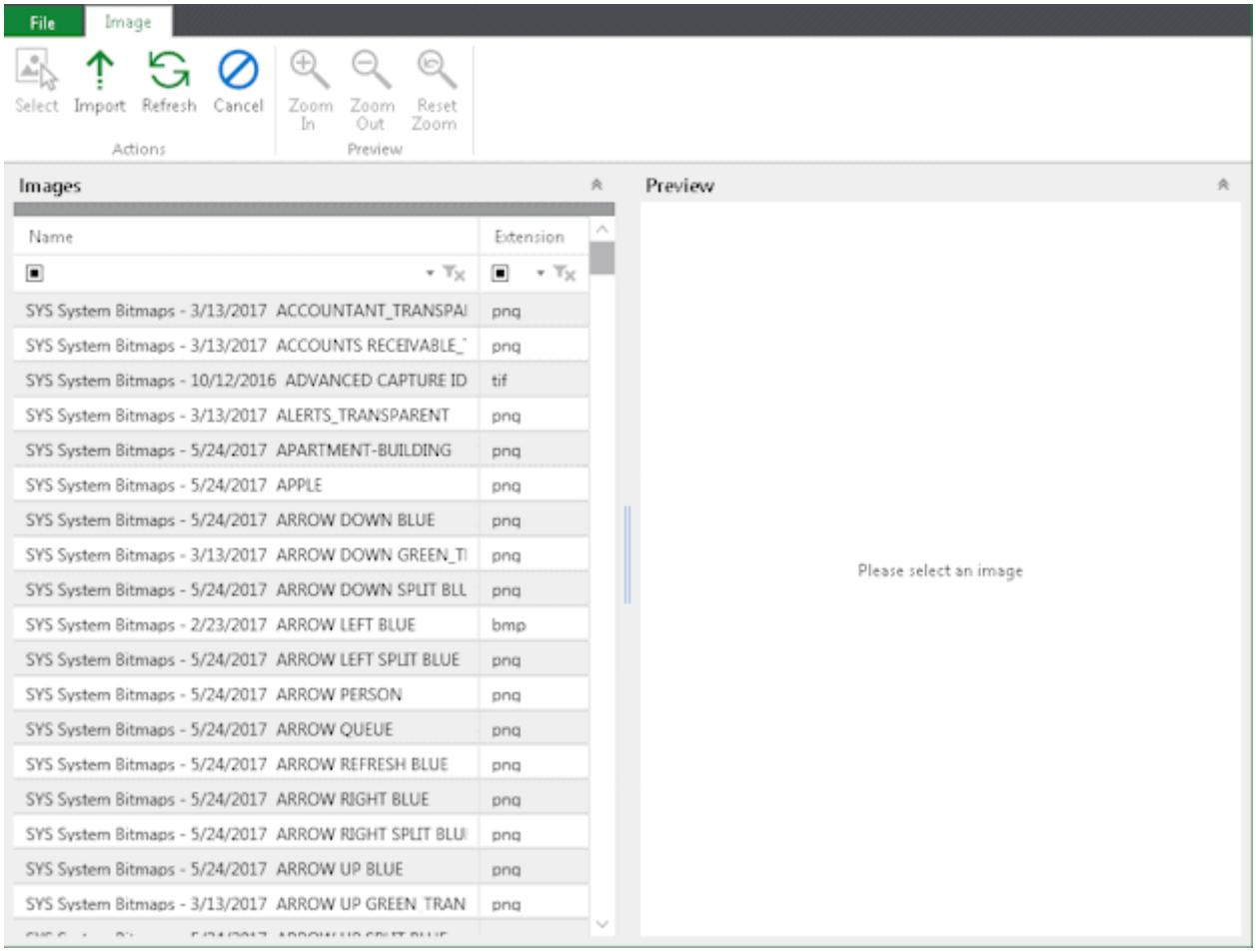
Placing an Image on a Form

Note: Images placed on Unity Forms must be imported as SYS System Bitmaps Document Types before they can be used on a form.

Note: If an image is deleted from OnBase, the Unity Form template will continue to display the image until it is removed from the template. If the image is removed from the template, previously created forms will continue to display the image. Forms created after removing the image and republishing the template will no longer display the image. If the image is updated or changed on the Unity Form template, forms created previous to the edit will display the old image, and the forms created after the edit and republishing will display the new image.

To place an image on a form:

1. In the Designer, select the **Image** control in the **Toolbox**. The following dialog is displayed:



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2. You can refresh the list of images by clicking **Refresh** in the **Actions** section of the ribbon.
3. You can close the dialog without adding an image by clicking **Cancel** in the **Actions** section of the ribbon.
4. Select an image from the list of images to preview it in the **Preview** pane.
5. With an image selected, you can perform the following actions:
   - Zoom in on an image by clicking **Zoom In** in the **Preview** section of the ribbon.
   - Zoom out on an image by clicking **Zoom Out** in the **Preview** section of the ribbon.
   - Restore the image to its original magnification by clicking **Reset Zoom** in the **Preview** section of the ribbon.
6. To add the image to the form, with an image selected, click **Select** in the **Actions** section of the ribbon. The dialog is closed and the image is added to the form.

Searching for Images

You can search the list of images by entering text in the filter bar above the list.

When you select the drop-down list under a column header, you will be able to select values that you want to display. The following options are available:

- **(Custom)**: This option opens the **Custom Filter Selection** dialog box, which allows you to configure conditions for the search.
- **(Blanks)**: This option displays items that have a blank value for the column being searched.
- **(NonBlanks)**: This option displays items that have a value for the column being searched.
- **<Value>:** All values currently displayed in the results are displayed and can be selected to only show items with the selected value.

When you click under the column header, you will be able to type values to search on.

Column Search Options

The following are search type options available when searching on a column. You can access the search type option drop-down list by single-clicking under on the icon on the left side of the field under the column. The following options are available.

Option	Description
Equals	Displays all items that exactly match the value provided.
Not equals	Displays all items that do not match the value provided.
Less than	Displays all items with values less than the value provided.
Less than or equal to	Displays all items with values less than or equal to the value provided.

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Option	Description
Greater than	Displays all items with values greater than the value provided.
Greater than or equal to	Displays all items with values greater than or equal to the value provided.
Contains	Displays all items that contain the value provided.
Does not contain	Complement of **Contains**.
Like (wildcards)	Displays matching items when the value provided contains wildcards (* and ?).
Not like (wildcards)	Complement of **Like**.
Match (regular expression)	Displays all items matching the value provided, where the value provided is a regular expression. A regular expression is a specially formatted search string that uses symbols to represent complex matching patterns. For example, a vertical bar (|) can be used to separate alternatives. The string **failed|error** would return all rows containing either **failed** or **error**. For information about regular expressions, consult a programming reference guide.
Does not match (regular expression)	Complement of **Matches Regular Expression**.
Starts with	Displays all items that start with the value provided.
Does not start with	Complement of **Starts with**.
Ends with	Displays all items that end with the value provided.
Does not end with	Complement of **Ends with**.

Importing Images

If you need to ad hoc import an image, you can do so from the image import dialog.

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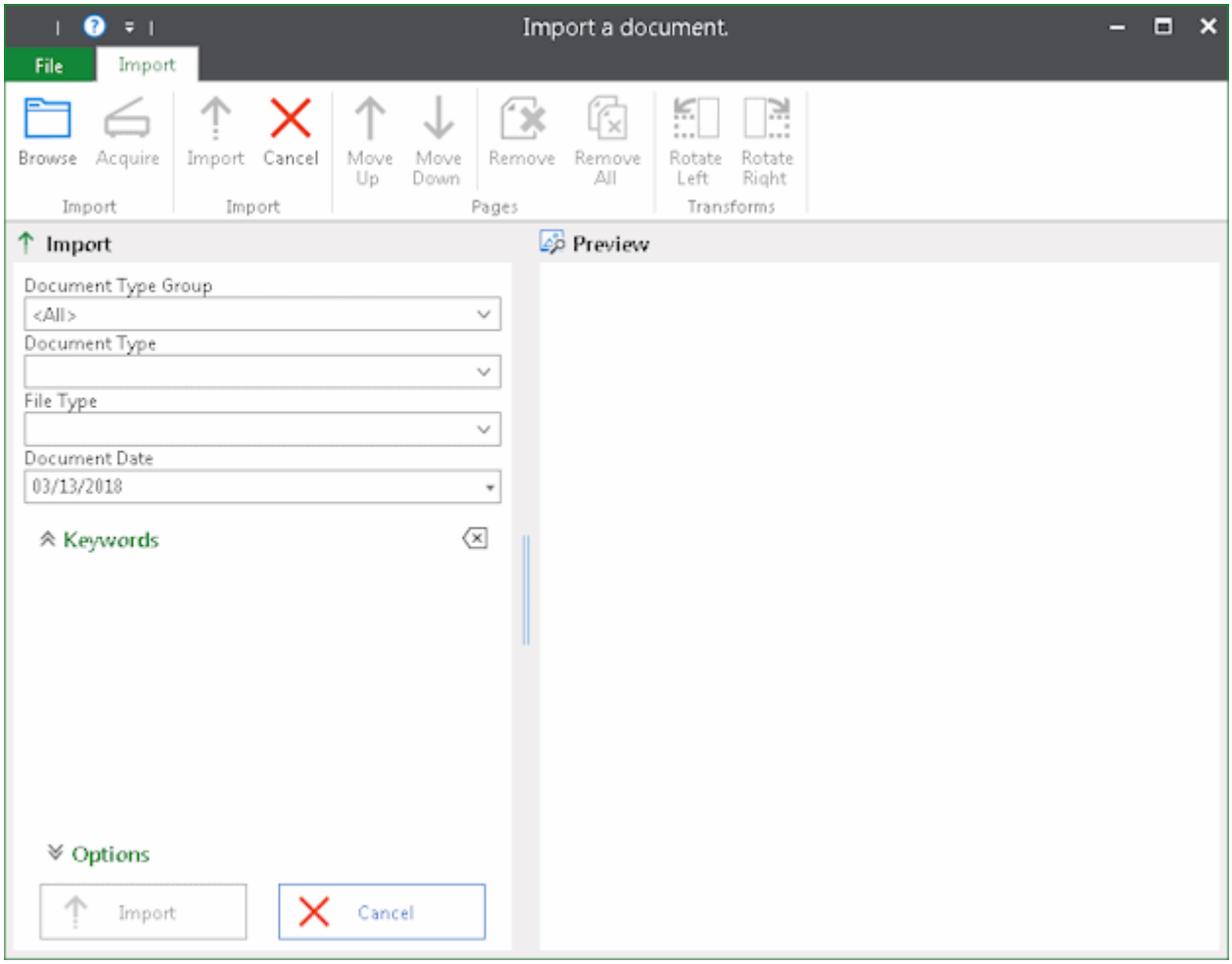
To import an image:

1. In the **Actions** section of the ribbon, click **Import**. The **Import a document.** dialog is displayed.



2. In the **Document Type Group** drop-down list, ensure **System Documents** is selected.
3. In the **Document Type** drop-down list, ensure **SYS System Bitmaps** is selected.
4. In the **File Type** drop-down list, ensure **Image File Format** is selected.
5. In the ribbon, click **Browse** to display the file browser and select an image document. Click **Open** once you have selected the document.
6. The document will be displayed in the preview pane.
7. In the **Description** field, enter a description for the document.
8. When finished, click **Import**. The imported document will be displayed in a new window.
9. You can close the **Import a document.** dialog when finished.

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Creating Data Set Fields

When a field is created on a form that is linked to a Keyword Type configured to use a Data Set, the Data Set is automatically associated with the field in the Designer and the Data Set is available in the Client to use for value selection. The following is an example of a Keyword Type field associated with a data set in the Designer:

Additionally, if a Keyword Type with a Data Set is configured with the **Keyword Must Exist** option in the Configuration module, by default the **Value must exist** property is selected, and the value must exist in the Data Set associated with the Keyword Type in order to save data in the field. If the **Value must exist** option is unchecked, the value does not have to exist in the Data Set in order to be saved. This will override the **Keyword Must Exist** setting in the Configuration module.

Configuring Self Configured Data Sets

When there is a select list field or a Keyword Type field configured with a Data Set, a self configured Data Set can be configured for a field. A self configured Data Set is a list of Data Set values that can be created and associated with a field on an ad hoc basis. Self configured Data Sets can be used by multiple fields in multiple forms.

To configure a self configured Data Set for a field:

1. Select a field in the Designer that has a drop-down control.
2. In the **Properties** pane, click the edit button next to the **Data Set** property field.
3. Select either select an existing Data Set or a new Data Set.

   If you select **Existing**, select the Data Set from the box that you want to associate with the field.

   If you select **New**, enter a name for the Data Set in the field.
4. If you selected **Existing**, click **Finish**. If you selected **New**, click **Continue**.
5. Enter a value in the **New Dataset value** field. Click the **Add** button. Repeat this step for each value you want to enter.

   You can arrange the values by selecting a value and using the **Up** and **Down** buttons to move the value to the desired position in the list of values. You can also sort values in the list by clicking **Sort Ascending** or **Sort Descending** buttons. You can also delete a value from the list by selecting the value and clicking **Remove**.
6. Click **Finish**.

If you have a Keyword Type field associated with a Keyword Type that has a Data Set configured for it in the Configuration module, any self configured Data Set that is configured in the Form Designer for a field will override the Keyword Type's Data Set for that specific field.

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If you decide you do not want to override a Data Set configured at the Keyword Type level, you can revert back to the Data Set configured at the Keyword Level:

1. Select the field you have created a data set override upon.
2. Click the edit button next to the **Data Set** field.
3. Select **None**.
4. Click **Finish**. The **Data Set** field will display **Using Keyword Data Set**.

You can specify that the value has to exist in the configured Data Set in order to submit the form by selecting the **Value must exist** property.

Field Requirements for Self Configured Data Sets

In order to configure a self configured Data Set for a field, one of the following requirements must be met:

- The field was initially created using the **Select List** control.
- The field is associated with a Keyword Type that has a Data Set configured for it in the Configuration module.
- The field is associated with a Keyword Type that has a Data Set configured for it in the Configuration module within a Multi-Instance Keyword Type Group.

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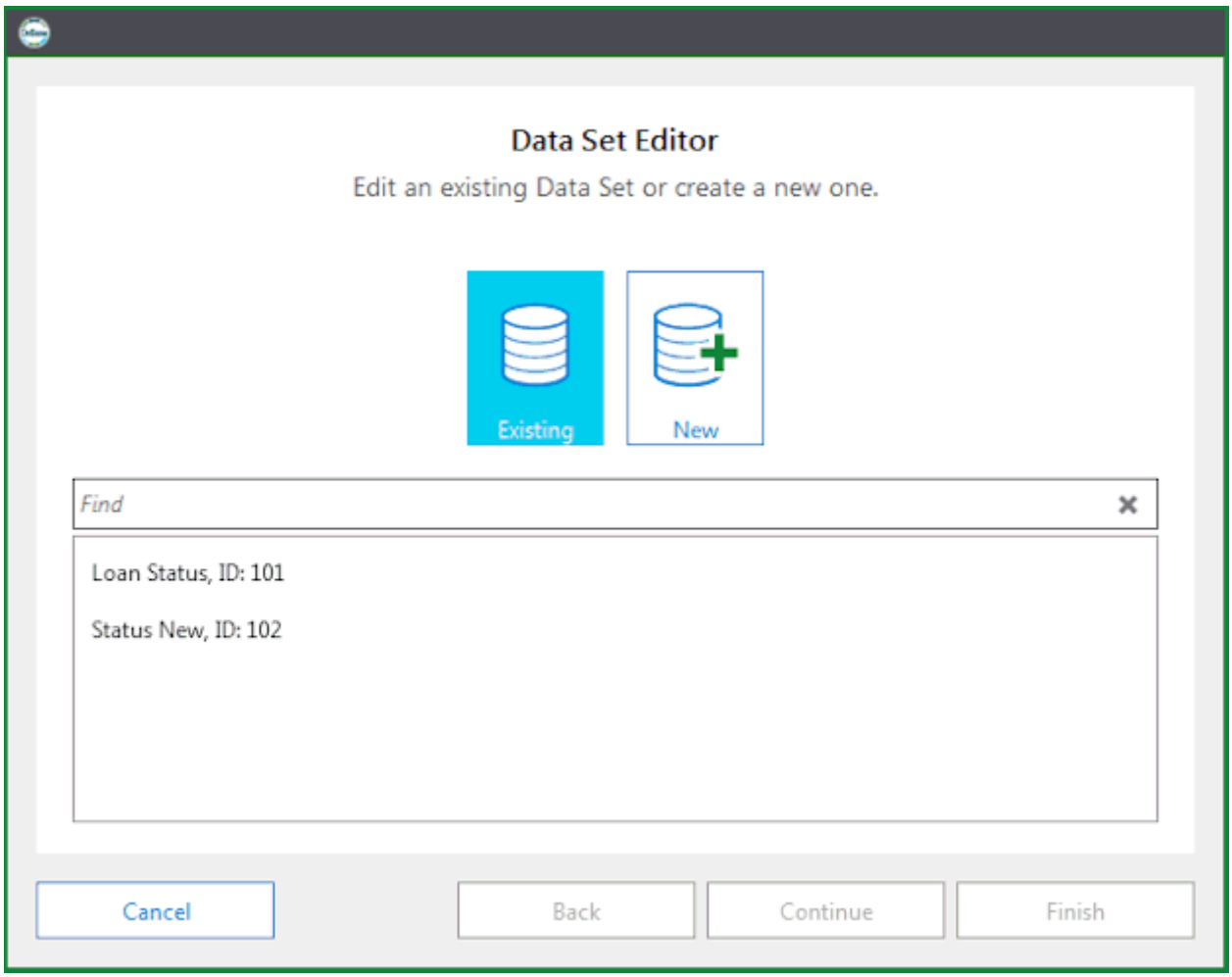
Changing the Name of a Data Set

You may want to edit the name of a data set. To edit the name:

1. Select a field in the Designer that has a drop-down control.
2. In the **Properties** pane, click the edit button next to the **Data Set** property field. The **Data Set Editor** is displayed.



3. Select the data set for which you would like to change the name. If you want to narrow the data sets displayed for selection, in the **Find** field, enter text that is contained in the name of the data set you want to create.
4. Click the **Edit** button next to the data set name.
5. Enter the new name.

Caution: Do not select another data set after making a change. Changes will be reverted if this occurs. Only one name change can be administered at a time.

6. Click **Finish**. You can also click **Continue** if you want to add values to the data set or configure the sorting of the values.

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Using Cascading Data Sets in Unity Forms

In order for Cascading Data Sets to function in a Unity Form, the Cascading Data Set must be configured as described in the Configuration documentation and assigned to the Document Type that will be used to store the Unity Form. To configure a Cascading Data Set on a form, place the keywords which belong to the Cascading Data Set on the form. Keyword Types may be located anywhere on the form, but for any level placed on the form, all higher levels must appear as well so that cascading can occur correctly.

The parent or root Keyword Type must be placed on the form. In order to maintain a Cascading Data Set's functionality, neither the parent/root or child/secondary Keyword Type's control type should be changed.

When using Cascading Data Sets, Unity Forms specific data sets cannot be used in conjunction with Keyword Type defined data sets. Cascading Data Sets must be configured in the Configuration module at the Keyword Type level. Overriding a Keyword Type field with a Unity Forms specific data set will disable cascading data set functionality. If you override the parent/root data set, the children/secondary data sets will not populate based on the parent/root keyword value selection. Each keyword in the Cascading Data Set within the form must have the **Use Keyword Data Set** option selected in order to maintain the integrity of a Cascading Data Set as a whole.

When using a Cascading Data Set, in order to place a child/secondary Keyword Type on the form, it's parent/root Keyword Type must exist on the form. If a child/secondary Keyword Type is placed on the form, and its parent/root Keyword Type does not exist, you cannot publish or test drive the form.

In the Client, in order to access data set values from a child/secondary Keyword Type, the parent/root Keyword Type must be populated first on the form.

Filtering External Data Sets in Unity Forms

In order to use filtering with external data sets based on a value entered on the form by a user, you must configure the external data set in a specific way using a Unity Script. In order for this functionality to work for an external data set, the external data set must have the Unity Script option selected with a script selected from the drop-down list and the **Send existing Keyword values from Unity Forms** option selected in the **External Keyword Data Set Configuration** dialog box.

For more information about configuring external data sets, see the System Administration documentation.

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Creating Drop-Down Fields

When a field is created on a form that is linked to a Keyword Type configured to use a drop-down list, the field automatically has a drop-down control associated with it and the Data Set field displays **Using Keyword Data Set**. This is displayed even if the Keyword Type is only configured to use a drop-down list and does not have a data set configured. Keyword Types configured with the **Allow Drop-Down Lists** option selected, but not configured to use a Data Set, display all keyword values currently associated with the Keyword Type.

If you want to limit the number of values displayed in the drop-down list at once, enter the maximum number of values you want to display in the **Maximum Results** setting for the field in the Forms Designer. If this setting is set to 0, all available values will be returned.

If the **Value must exist property** option is selected, the value must exist as a value associated with the Keyword Type in order to save data in the field. If the **Value must exist** option is unchecked, the value does not have to exist as a value in order to be saved.

Setting a Form Element to Read-Only

Fields, sections, and pages can be set to display as read-only through the Properties pane. To set a field, section, or page to read-only:

1. Select the control you want to set to read-only in the form in the Designer.
2. In the **Properties** pane, select the **Read-Only** check box. Selecting this option makes the control read-only for all user groups.

Configuring the Attachment Control

You can configure the attachment control to allow users to attach documents to a form.

Note: Users cannot upload attachments larger than the configured **maxRequestLength** setting in the Application Server's web.config file for the Unity Client and the Web Server's web.config file for the Web Client. For more information, see the **Application Server** or **Web Server** module reference guide.

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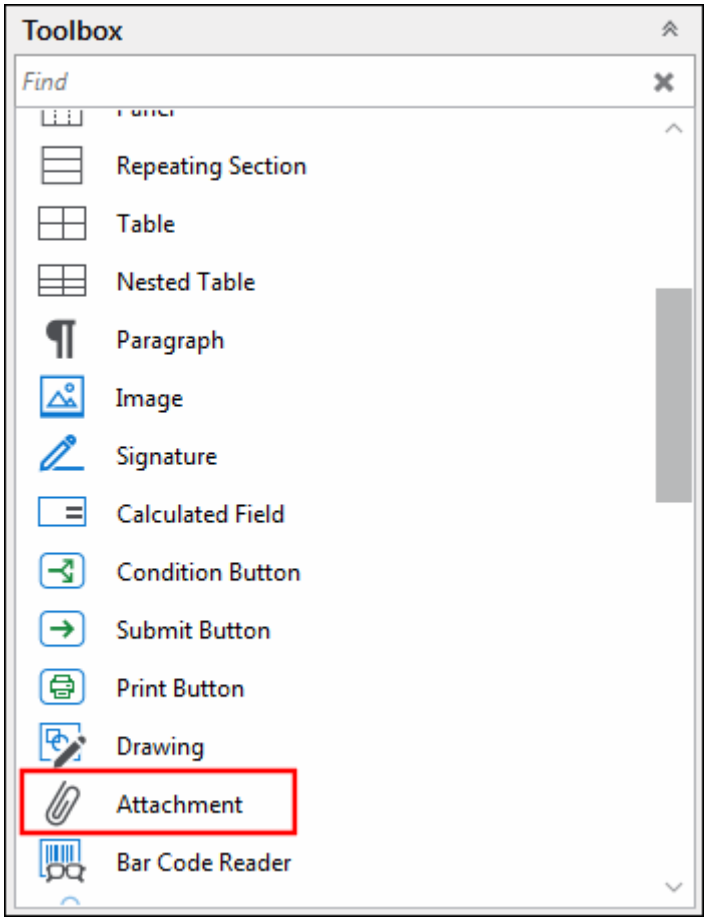
To configure the attachment control:

1. Locate the attachment control from the **Toolbox** window and place the control on the form.



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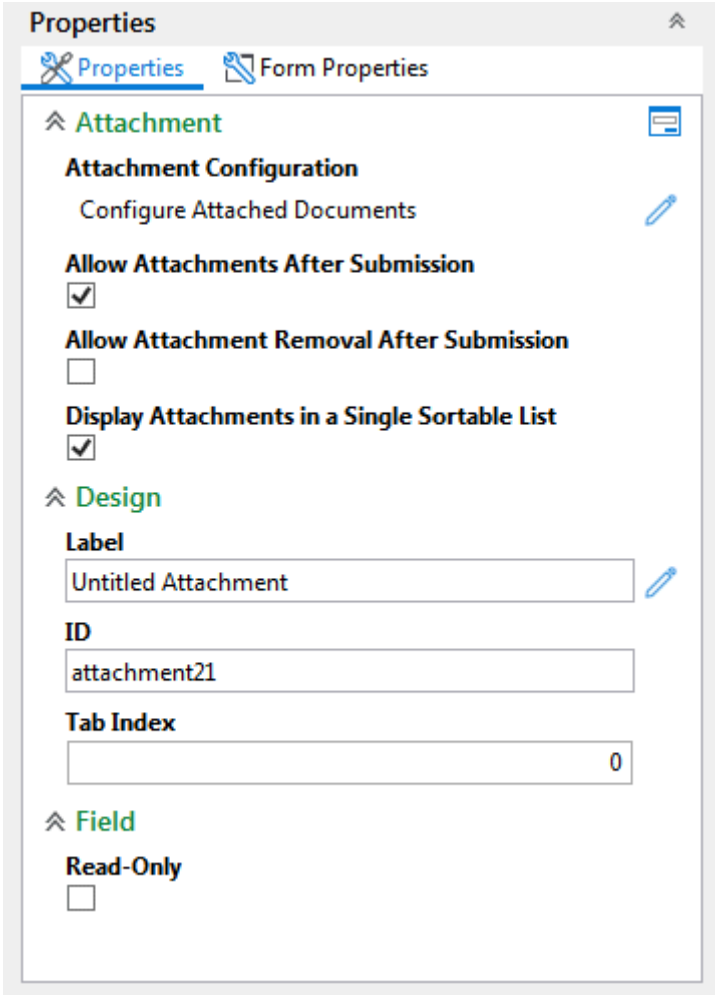
2. Select the new attachment control on the form template.The **Properties** window for the control is displayed when the control is selected.



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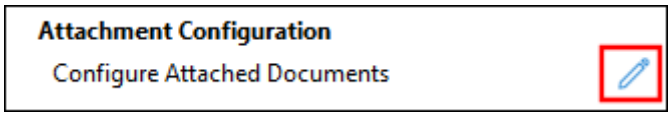
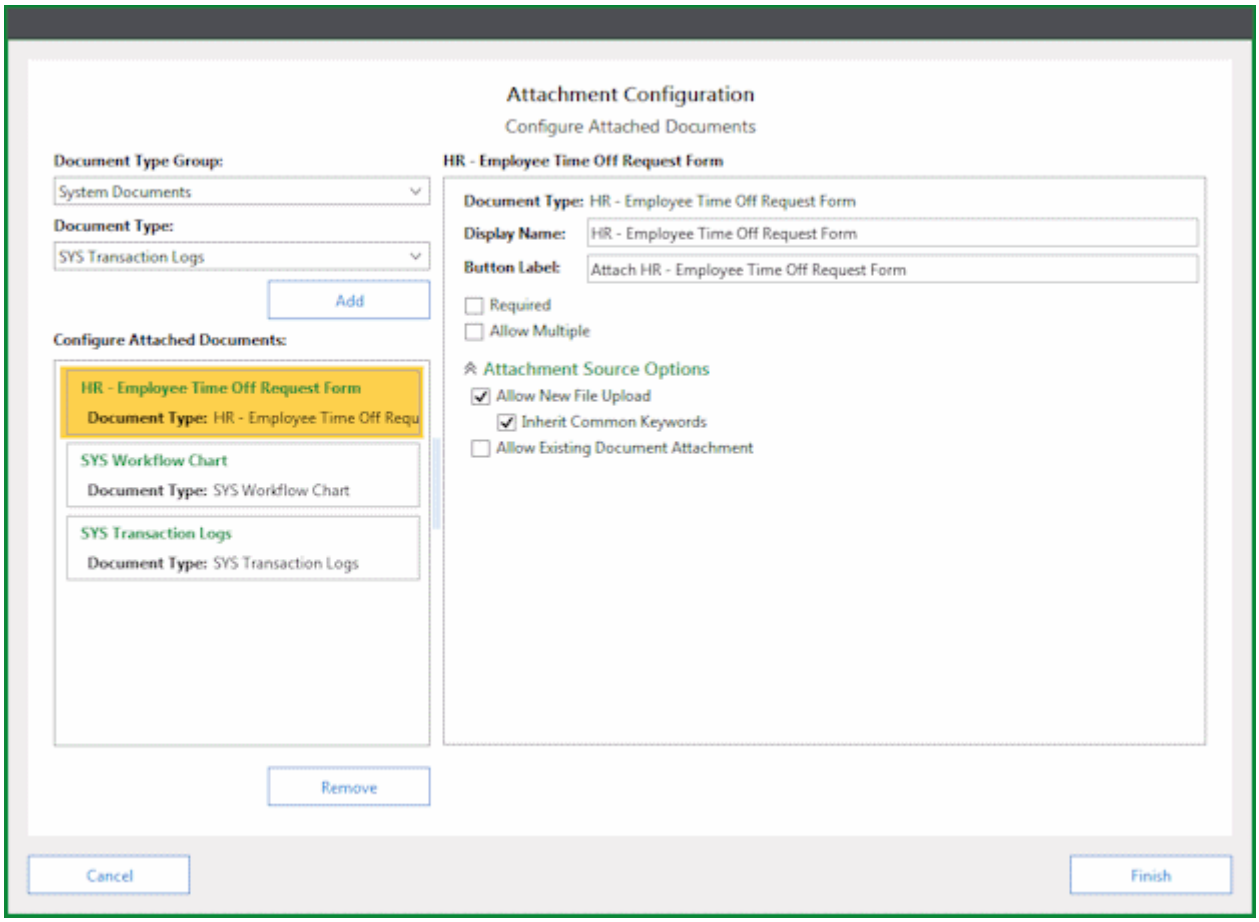
3. In the **Properties** tab, click the edit button next to **Configure Attached Documents**.



The **Configure Attached Documents** dialog box is displayed.



4. Select a Document Type Group from the **Document Type Group** drop-down list to narrow the Document Types available.
5. Select the Document Type from the **Document Type** drop-down list that the attachment is associated with when it is imported.
6. Click **Add**. The Document Type is displayed in the **Configure Attached Documents** section.
7. Enter a display name in the **Display Name** field to display text above the attachment button.
8. Enter a button label in the **Button Label** field to display text within the attachment button.
9. Select **Required** to require users to attach at least one document of the selected Document Type before submitting the form.

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10. Select **Allow Multiple** to allow users to attach multiple documents of the selected Document Type before submitting the form.
11. Select the **Allow New File Upload** option to upload files from a local directory and have them added to OnBase as new documents and then attached to the form. This option is selected by default.
12. Select the **Inherit Common Keywords** option to inherit values from Keyword Types that are associated with both the form and the Document Type to the attached document. This option is selected by default. If this option is deselected, the **Keyword Mapping** link is displayed next to the option description. For more information on keyword mapping, see Configuring Keyword Mappings on page 87.
13. Select the **Allow Existing Document Attachment** option to allow existing documents in OnBase to be used as attachments.
14. Select the **Restrict to this Document Type** option to only allow existing documents of the attachment's Document Type to be attached. This option is only displayed when the **Allow Existing Document Attachment** option is selected.

    This option is selected by default. Deselecting this option allows users to attach any documents they have rights to.

Note: At least one option within the **Attachment Source Options** section must be selected to complete the attachment configuration. If these options are deselected, the **Finish** button is disabled**.**

15. Repeat this process for each Document Type you want to associate with an attachment control.

    Click **Remove** to remove a Document Type that is configured for an attachment control in the **Configure Attached Documents** list.
16. Click **Finish**.

Configuring Keyword Mappings

If a Document Type's configuration has the **Inherit Common Keywords** option deselected and therefore is not automatically inheriting common Keyword Type/Multi-Instance Keyword Type Group values on the form, you can map Keyword Types/Multi-Instance Keyword Type Groups associated with the attachment's Document Type to Keyword Types/Multi-Instance Keyword Type Groups associated with the form's Document Type.

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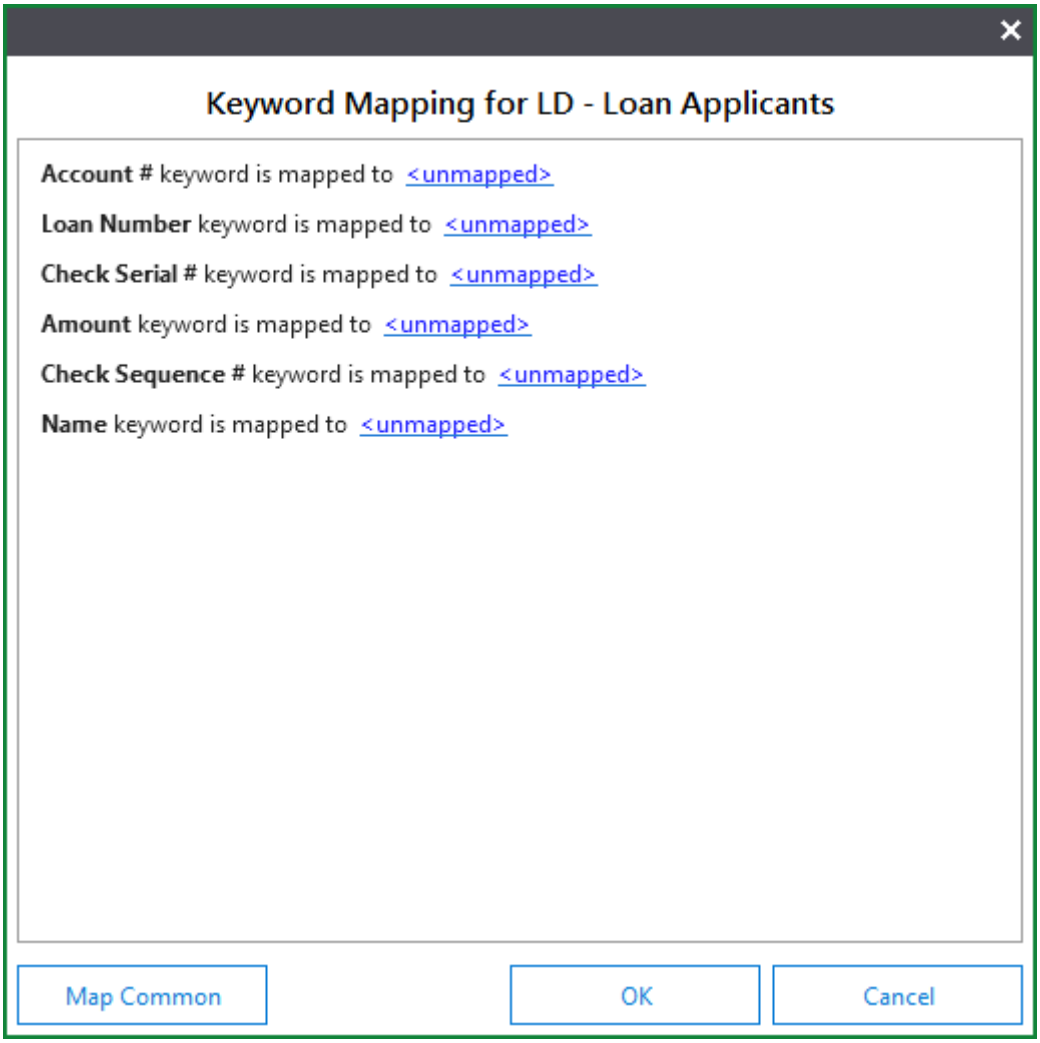
To configure keyword mappings:

1. Click the **Keyword Mapping** link to map Keyword Types. The **Keyword Mapping for [Document Type]** dialog box is displayed.



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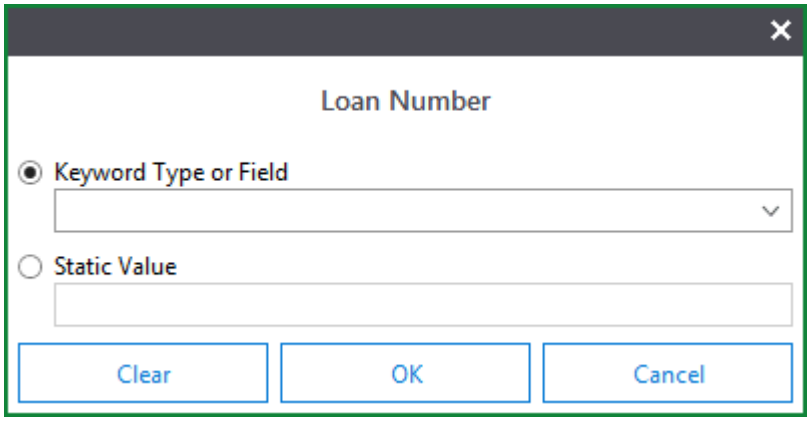
2. Next to the Keyword Type you want to map, click on the **<unmapped>** link. A dialog box for the Keyword Type is displayed.



3. Select **Keyword Type or Field** or **Static Value.**
   - When the **Keyword Type or Field** option is selected, the drop-down list is enabled. Select a Keyword Type, the **<Attachment Name>**, the **<Document Handle>**, or **<none>** from the drop-down list.
   - When the **Static Value** option is selected, enter the static value you would like to map to the Keyword Type.
4. Click **OK**. The change to the Keyword Type mapping is displayed in the **Keyword Mapping for [Document Type]** dialog box.
5. If the form contains a Multi-Instance Keyword Type Group and you want to map it to the same Multi-Instance Keyword Type Group on the attachment's Document Type, click the **unmapped** link. The link will update to **mapped**, indicating the Multi-Instance Keyword Type Group is now mapped.

Note: When a Multi-Instance Keyword Type Group on a form is mapped, all the Keyword Types in it are automatically mapped to the matching Keyword Types in the attachment's Multi-Instance Keyword Type Group. Keyword Types in Multi-Instance Keyword Type Groups cannot be individually mapped.

6. To map all the Keyword Types that are common between the form and the Document Type, click **Map Common**. The links next to the Keyword Type names are updated to reflect the changes made by selecting this option.
7. When the desired Keyword Types/Multi-Instance Keyword Type Groups are mapped, click **OK.** If any Keyword Type/Multi-Instance Keyword Type Group is left unmapped, it will not map to the form's Document Type.

Note: When Keyword Types/Multi-Instance Keyword Type Groups are mapped from a Document Type to a form, values that are associated with the form are mapped, regardless of whether or not the value is displayed on the form itself. For example, if a Keyword Type exists in the **Keywords** section of the **Toolbox** window for the form but does not have a field on the form, the value is still mapped to the new attached documents.

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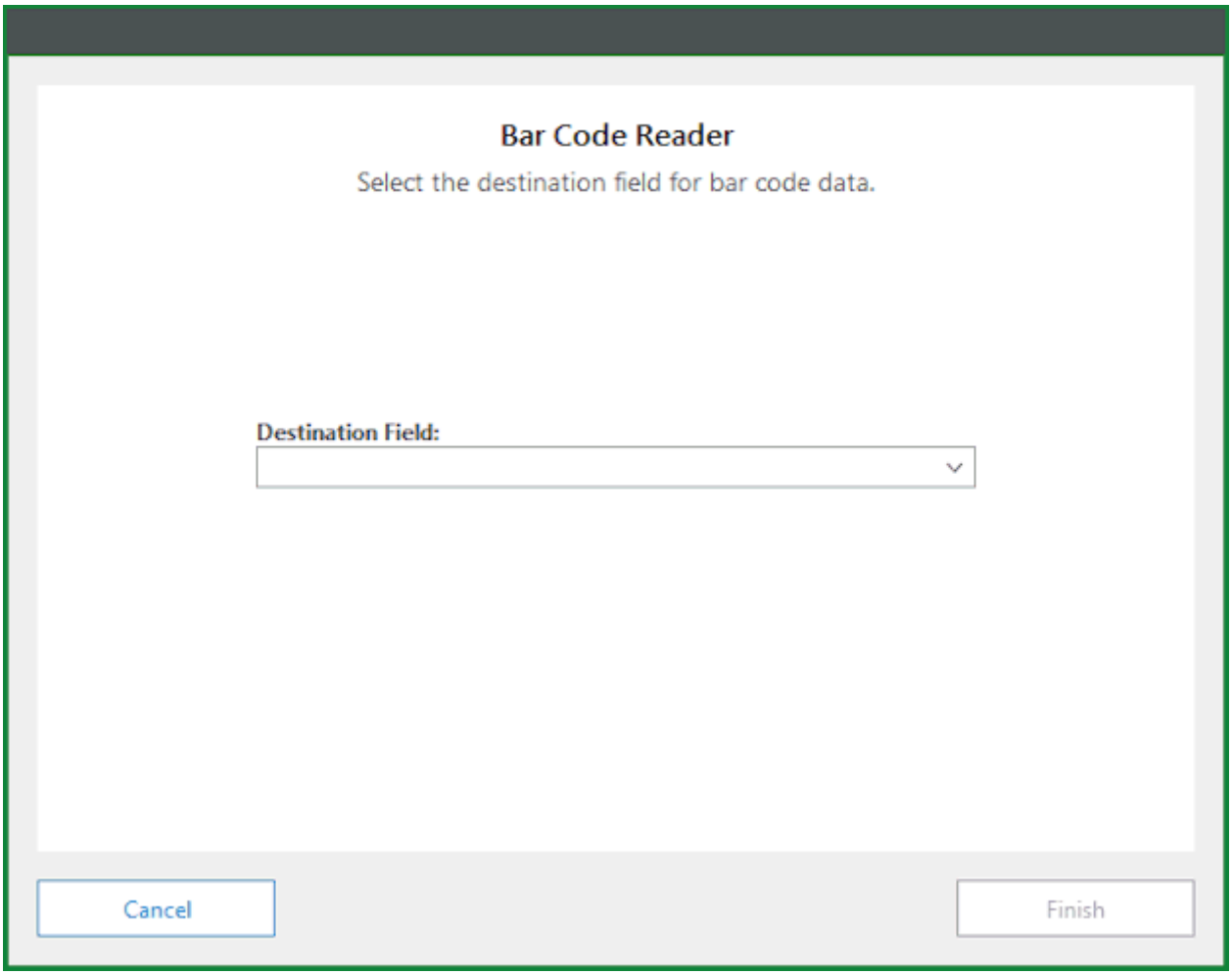
Configuring the Bar Code Reader

The Bar Code Reader control will allow you to read a value from a bar code and populate that value into a specified field. To configure the control:

1. Place the control on the form.
2. Select the control.
3. In the **Properties** tab, click the edit button next to **Bar Code Reader Configuration**. The **Bar Code Reader** screen is displayed.



4. From the **Destination Field** drop-down list, select the field you want to populate with the data captured from the bar code.
5. Click **Finish**.

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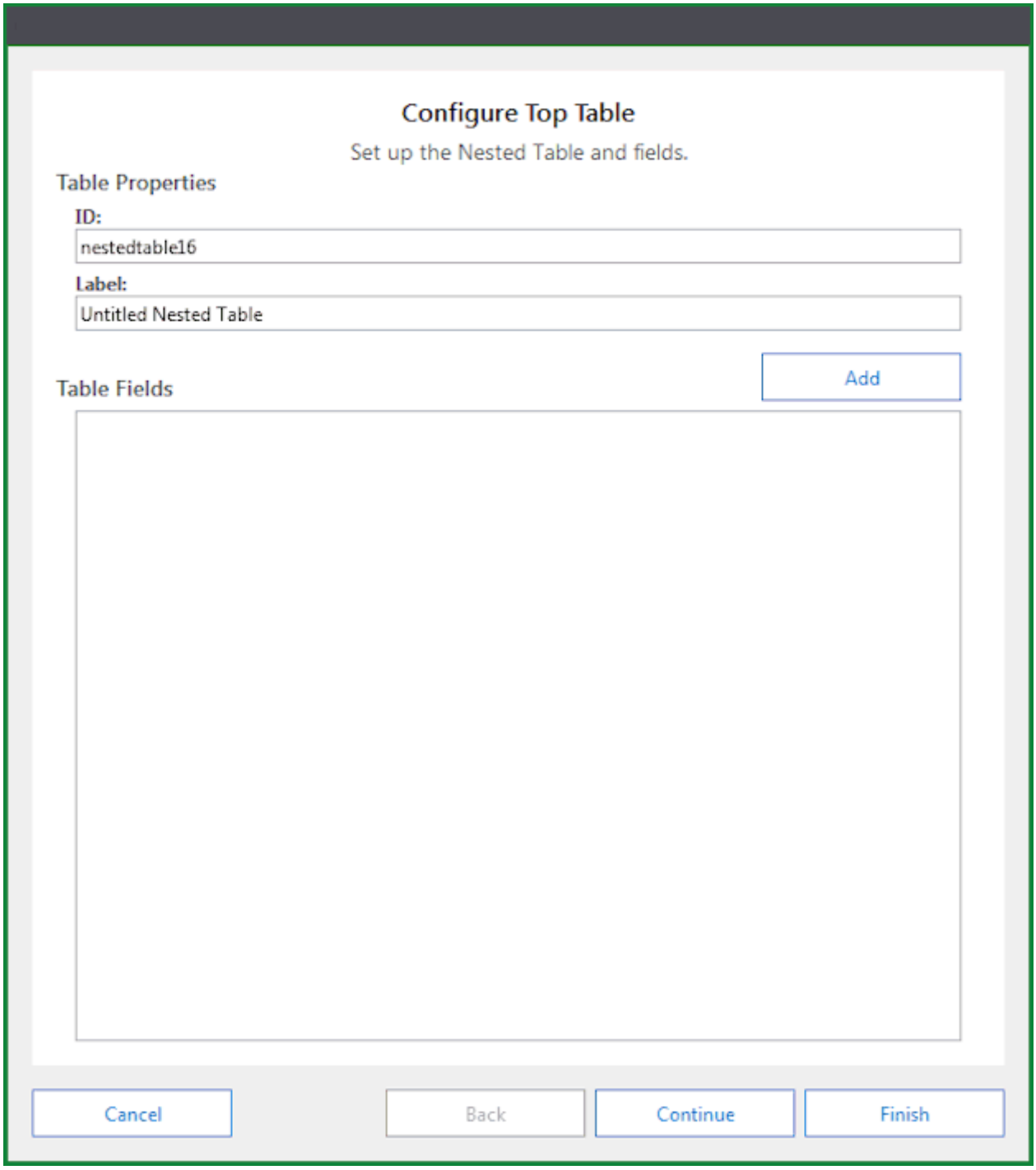
Configuring Nested Tables

A nested table allows you to create a top-level table that contains data and each line item can have a secondary table of data associated with it. To configure a nested table:

1. Place the control on the form. The **Configure Top Table** wizard is displayed.



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2. If you would like to edit the ID of the table, enter the new ID name in the **ID** field.
3. Enter the **Label** you want associated with the table.
4. Click **Add** to add a field to the top-level table.
5. If you would like to edit the ID of the field, enter the new ID name in the **ID** field.
6. Enter the **Label** you want associated with the field.
7. Add as many fields as you need.

Note: You can click and drag a field to move the field to a different position in the displayed field order.

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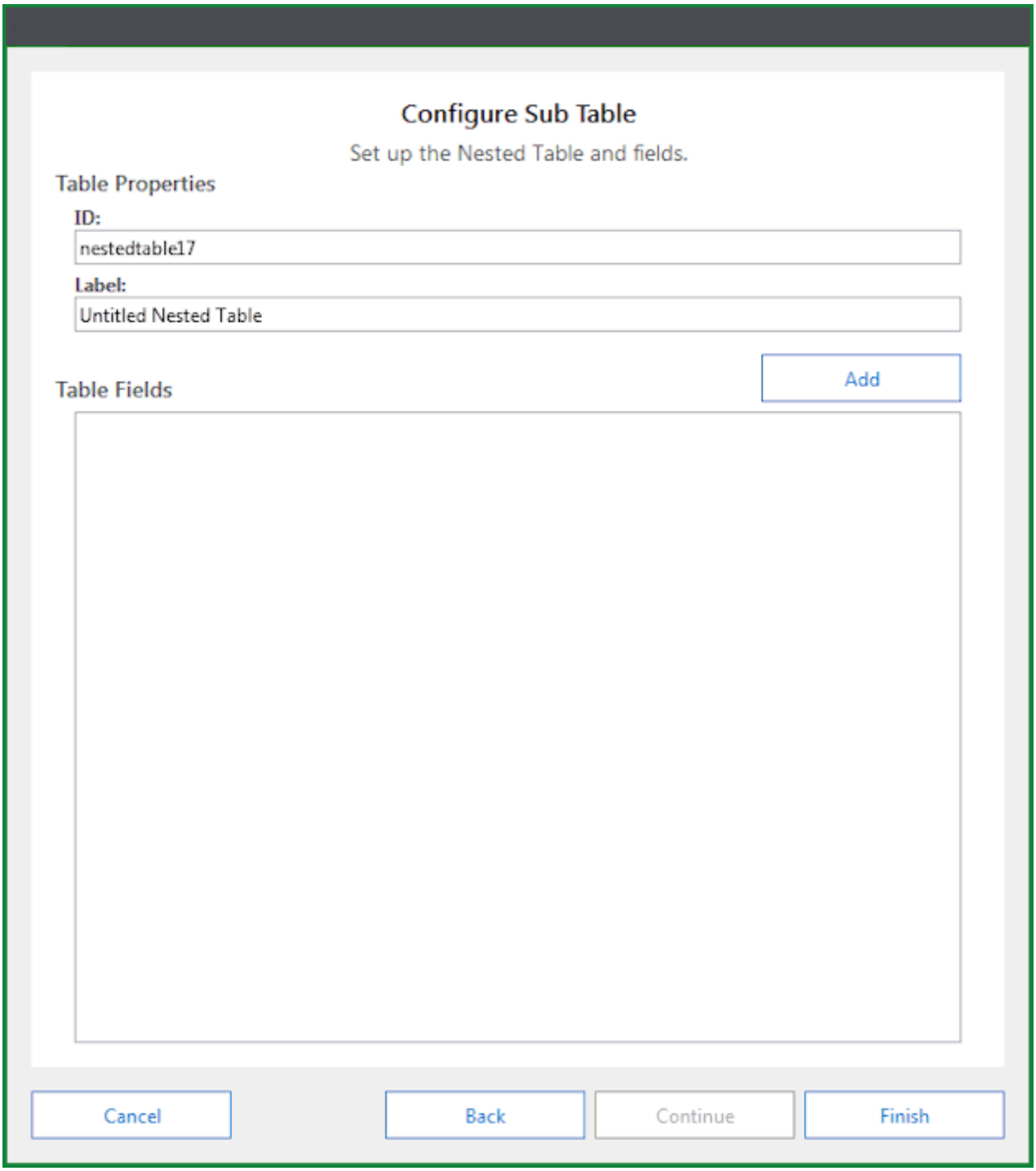
8. Click **Continue**. The **Configure Sub Table** screen is displayed.



9. If you would like to edit the ID of the table, enter the new ID name in the **ID** field.
10. Enter the **Label** you want associated with the table.
11. Click **Add** to add a field to the sub-level table.
12. If you would like to edit the ID of the field, enter the new ID name in the **ID** field.

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13. Enter the **Label** you want associated with the field.
14. Add as many fields as you need.

Note: You can click and drag a field to move the field to a different position in the displayed field order.

15. Click **Finish**.

Alternately, you can add fields by placing your cursor in the table **ID** or **Label** fields and pressing **Alt + Insert** on your keyboard.

You can remove a field by clicking the **Remove** button that corresponds to that field or select a field within the field's box that you want to delete and press **Alt + Delete** on your keyboard.

You can edit a nested table by selecting the table level you want to change in the Designer and clicking the edit button by the **Nested Table Configuration** option in the **Properties** tab.

Configuring Fields within a Nested Table

Once your nested table is configured, you can configure a field by selecting it in the table and configuring its properties. You can convert a field to a specific control type by selecting the appropriate **Control Type** property option. The following control types are available: **Check Box**, **Text Box**, **Select List**, **Multiline Text Box**, and **Calculated Field**. Once you change the control type, configure the field as appropriate for the type of control you selected.

Creating Calculated Fields

A calculated field can be created from the **Toolbox**. The **Calculated Field** control allows you to insert a field into the form and define an expression for that field to define the calculated result. These calculated fields can be added as a stand-alone field or within a repeating section or table (including repeating sections and tables bound to a Multi-Instance Keyword Type Group). The values are not stored, but calculated in real time.

Calculated fields are automatically configured as read-only fields. Calculated fields cannot be changed to other control types and cannot be linked to Keyword Types.

A stand-alone calculated field may reference any other stand-alone field on the form. It may not reference any fields contained inside repeating sections or tables.

A calculated field contained inside a repeating section or table may reference any field within that repeating section/table or any stand-alone calculated field on the form. It may not reference any fields contained within other repeating sections or tables.

Calculated field concatenation works with all data types supported by the Forms Designer, including: Numeric(9), Numeric(20), Text, Date, Currency, and Floating Point.

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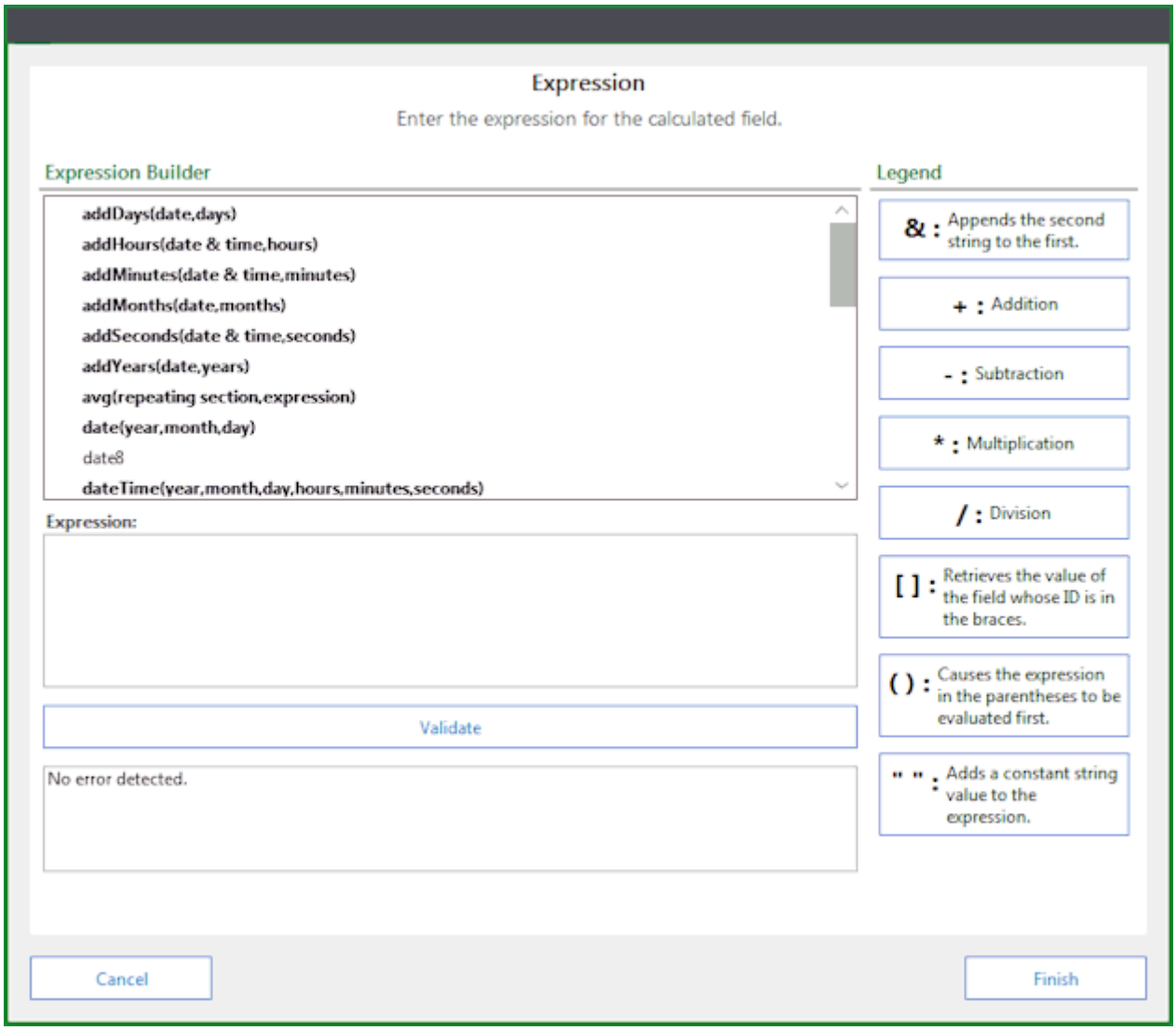
Expression Screen

The **Expression** screen allows you to define how a calculated field is determined. The **Expression Builder** section lists all of the fields currently placed on the form as well as functions. You can double-click on fields and functions to add them to the expression. The **Legend** lists operators that can be used to define an expression and corresponding buttons. Clicking on a button will insert the operator in the **Expression** field for further configuration.



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The top field contains fields that are currently placed on the form as well as functions that can be used in expressions. The following are the available functions:

Function	Description
addDays(date,days)	Adds the specified number of days to the date or date/time. Example: addDays(date(2011,12,2),30) This example adds 30 days to the date specified.
addHours(date & time, hours)	Adds the specified number of hours to the date & time value. Example: addHours([dateTime], 5) This example adds 5 hours to the date/time specified.
addMinutes(date & time, hours)	Adds the specified number of minutes to the date & time value. Example: addMinutes[dateTime], 10) This example adds 10 minutes to the date/time specified.
addMonths(date,months)	Adds the specified number of months to the date or date/time. Example: addMonths(date(2011,12,2),2) This example adds 2 months to the date specified.
addSeconds(date & time, seconds)	Adds the specified number of seconds to the date & time value. Example: addSeconds[dateTime], 45) This example adds 45 seconds to the date/time specified.
addYears(date,years)	Adds the specified number of years to the date or date/time. Example: addYears(date(2011,12,2),5) This example adds 5 years to the date specified.
avg(repeating section,expression)	Calculates the average of the fields of the field type specified in the specified repeating section or table. Example: avg([repeatername],[fieldname])
date(year,month,day)	Creates a date with the specified year, month, and day. Example: date(2011,12,2)
day(date)	Populates the field with the day of the month specified for date or date/time Example: day(date(2011,12,2)) In this example, 2 is populated because this is the second day of the month.
daysBetween(beginDate,endDate)	Calculates the days between the dates specified. The following example compares a specified date to a field on the form: daysBetween(date(2013,2,22),[datefield])

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Function	Description
dateTime(year,month,day,hours,minutes,seconds)	Gets the date & time value from the given parameters. The time parameter values are expected to be in the range 00:00:00 – 23:59:59
month(date)	Populates the month of the specified date as a number for date or date/time. Example: month(date(2011,12,2)) In this example, 12 is populated because this is the 12th month of the year.
newline()	**Note:** This should only be used in conjunction with a **Multiline Text Box** field. Using this with any other field type could produce unexpected results. This will place a line break in a **Multiline Text Box** field.
now( )	Populates the field with the current date and time.
round(numeric value,decimal places)	Rounds the number up or down using the decimal place number specified. This rounds the number up when the value of the place after the decimal place number specified is 5 or greater. If the value has a decimal value less than 5, the value will not be rounded up. The value is rounded down when the decimal value is less than 5. For example, if you have **round(1.25,1)**, the value would be rounded up to 1.3 because the second place is 5.
roundDown(numeric value,decimal places)	Rounds the number down using the decimal place number specified. For example, if you have **roundDown(1.25,1)**, the value would be rounded down to 1.2.
roundUp(numeric value,decimal places)	Rounds the number up using the decimal place number specified. For example, if you have **roundUp(1.25,1)**, the value would be rounded up to 1.3.
sum(repeating section,expression)	Calculates the sum total of the fields of the field type specified in the specified repeating section or table. Example: sum([repeatername],[fieldname])
today( )	Populates the field with the current date.
year(date)	Populates the field with the year of the specified date or date/time. Example: year(date(2011,12,2))

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Enter the calculation in the **Expression** field. You can validate the expression by clicking the **Validate** button. Errors in the expression are displayed below the **Expression** field.

Syntax

Symbol	Description
[ ]	Use brackets to reference fields you want to calculate within the expression. Reference the field by its ID found in the property grid when the field is selected.
" "	The value within quotation marks is a static value used in the calculated field.
&	This operator combines two (or more) values as one string value.
+	Adds numeric values together.
-	Subtracts numeric values from each other.
*****	Multiplies numeric values.
/	Divides numeric values.
( )	Parentheses are used to group expressions and define the precedence of operations within the expression.

Examples

The following is an example of a string expression:

```
"Hello "&[firstName]&“ “&[lastName]
```

This calculated field would create a value such as: Hello John Adams

The following is an example of a numeric expression:

```
([amountfield1]+[amountfield2])x[quantityfield]
```

This calculated field would create value of the sum of amoundfield1 and amountfield2 multiplied by the quantityfield value.

Order of Precedence in Expressions

When building expressions, operators have the following precedence: * and / have the highest precedence, followed by + and -, and & has the lowest precedence. ( ) can be used to make a sub-expression have higher precedence. Functions always have higher precedence over any other operator.

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Date Calculations

For date calculations, the minimum possible date is 01/01/0001 and the maximum possible date is 12/31/9999. If adding or subtracting a value from a date causes it to pass the maximum or come before the minimum limit, the date reverts to the maximum value or minimum value.

When fractions are used, the decimal part of the value is discarded and only the whole number is used for the calculation. For example, addDays(date(2011,11,22), 3.74) adds 3 days to the given date.

Multiple date values can also be added together as a string using the ampersand (&) operator.

International Requirements

The parameter separator is locale-specific with respect to international users. In all non-English locales, the parameter separator is a semicolon (;) instead of a comma (,). In Arabic, the parameter separator is the dash (-). For example, if the expression used is sum([repeatername],[fieldname]) in English, it would be sum([repeatername];[fieldname]) in Spanish.

When calculating date fields, non-English locales use semicolons (;) is used to separate date values in functions. For example, in English the function would be date(2011,11,22). In a non-English locale, it is date(2011;11;22). In case of non-Gregorian calendars, the date calculations are only updated after the form is submitted. The date selection control is not supported for non-Gregorian calendars. A masked field is available for entering dates in non-Gregorian calendars instead.

Using Calculated Fields with Repeating Sections or Tables Repeaters

Unity Forms designers can configure a field with an expression that involves the aggregation of repeating data. Sums and averages can be calculated from repeating data.

For sums, the syntax is sum([repeatername],[fieldname]) where repeatername is the control ID of the repeater (table or repeating section), and fieldname is the control ID of the field within that repeater.

For example, if you have a repeater called LineItem and a field within that repeater called Price, my sum function for that field would be sum([LineItem],[Price]). This would calculate the sum of the values of Price for each item in the repeater.

For averages, the syntax is avg([repeatername],[fieldname]) where repeatername is the control ID of the repeater (table or repeating section), and fieldname is the control ID of the field within that repeater.

For example, if I have a repeater called LineItem and a field within that repeater called Price, my average function for that field would be avg([LineItem],[Price]). This would calculate the average of the values of Price for each item in the repeater.

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Fields involved in aggregate functions must be numeric. Aggregate functions, just like numeric operations, are executed against keyword and non-keyword fields of the following data types: Numeric 9, Numeric 20, Floating Point, and Currency. Aggregate values are calculated in real time as necessary.

Moving Fields Related to Calculated Fields In and Out of Repeating Sections

Under the following conditions, the calculated field expression will be cleared:

- The calculated field is moved out of a repeating section and the fields referenced in the expression are not moved.
- A field referenced in a calculated field expression is moved into a repeating section.

If the calculated field and all of its referenced fields are within a container, moving the container in or out of a repeating section will not alter the calculated field's expression.

Direct Field References and Scope Types

There are three scopes when dealing with calculated field expressions. The first scope is the global scope. Fields anywhere on the form (in a page, section, or any container) are considered global scope as long as they are not in a repeater field or nested table. The second scope is the repeater scope. This scope is in a repeater field or the top level of a nested table. The last scope is the sub repeater scope. This scope is the second level of a nested table.

From a field in the global scope, fields in the repeater and sub repeaters cannot be directly referenced in an expression unless it uses an aggregate. See Using Calculated Fields with Repeating Sections or Tables Repeaters for more information about aggregates.

Fields in the repeater scope can directly reference fields within the repeater scope within the same repeater/nested table and the global scope. Fields in the repeater scope cannot directly reference fields in the sub repeater scope unless it uses an aggregate. See Using Calculated Fields with Repeating Sections or Tables Repeaters for more information about aggregates.

Fields in the sub repeater scope can directly reference fields within the sub repeater scope, within the same nested table, the repeater scope within the same repeater/nested table, or the global scope.

If a direct reference is made that is supported as described above, the expression will not be valid.

Adding Keyword Type Groups to a Unity Form

When adding Multi-Instance Keyword Type Groups to a form during form design, only one instance of a Multi-Instance Keyword Type Group can be placed in the same repeater section or table in the Designer. Additional instances of a Multi-Instance Keyword Type Group are added in the Client when data is entered into a form.

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When adding Keyword Types that belong to a Single Instance Keyword Type Group to a form in the Designer, only one instance of these types of Keyword Types can be added to a form.

Note: It is best practice to always add Keyword Types that are not in a Multi-Instance Keyword Type Group to a Workflow form's Document Type as standalone keywords and not as part of a Single-Instance Keyword Type Group.

Enforcing Keyword Modification Privileges

By default, when you modify a keyword value on an existing form, the value will be saved regardless of keyword modification rights and settings in the Configuration module. These settings include if a Keyword Type is set to read-only or if the logged in user does not have the **Modify Keywords** privilege. If you want to enforce the keyword modification configuration for the Keyword Types on a form, you must configure the form to not override those Keyword Type privileges and settings. To enforce keyword modification privileges:

1. With the form for which you want to configure open, select the **Form Properties** tab within the **Properties** pane.
2. Select **Enforce Keyword Modification Privileges**.

This setting will only affect forms that use that specific template revision. Enabling **Enforce Keyword Modification Privileges** on an existing form template will not make previously submitted forms enforce the keyword privileges.

When **Enforce Keyword Modification Privileges** is set and users do not have modify rights or do not have the **Access Restricted Keywords** privilege, set in the Configuration module, users that do not have access to modifying keyword values will not be able to submit the form when keyword values are changed. Depending on the Keyword Type's configuration, the user may need both the **Modify Keywords** and **Access Restricted Keywords** privilege to be able to modify keyword values when the **Enforce Keyword Modification Privileges** options is selected. See the System Administration documentation for information about Keyword Type configuration.

Scaling Form for Screen Sizes

If the form you are configuring will be accessed on a mobile device, you can configure it so the form will scale to fit the device that is accessing the form, making it easier for users to read and use forms on smaller device screens. To configure a form for scaling, on the **Form Properties** tab, select **Scale Viewport to Screen Size**. For newly created forms, this option is selected by default.

Configuring CAPTCHA Controls

If you want to verify that a person is interacting with the form and that the form is not being programmatically submitted while unattended, you can configure a form to include a CAPTCHA control. The CAPTCHA field available for Unity Forms uses the Google reCAPTCHA service. For more information about this service, see the following:

https://www.google.com/recaptcha/intro/index.html

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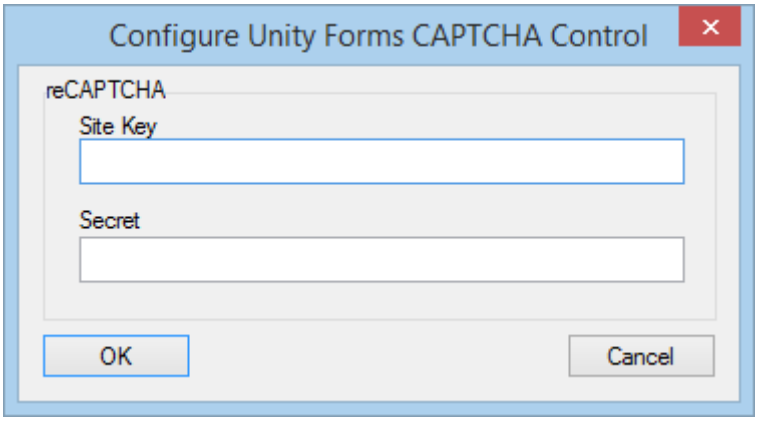
In order for the CAPTCHA control to be added to a form, a few setup steps are required:

1. When using Unity Forms within the Unity Client, the Application Server must be registered with the Google reCAPTCHA service.

   When using Unity Forms within the Web Client or when using a Unity Form as a Shared Form, the Web Server must be registered with the Google reCAPTCHA service.

   For information on registering with the Google service, see the following:

   https://developers.google.com/recaptcha/docs/start
2. Once you have obtained a site key and secret from you registration, you must specify the site key and secret within the Configuration module. In the Configuration module, select **Utils | Configure Unity Forms CAPTCHA Control**. The **Configure Unity Forms CAPTCHA Control** dialog box is displayed.



3. Enter the **Site Key** and **Secret**.
4. Click **OK**.

Once these steps have been completed, CAPTCHA controls can be added to Unity Forms.

To add a CAPTCHA control to a Unity Form:

1. From the appropriate form in the form designer, double-click on the **CAPTCHA** control in the **Toolbox**. The control will be added to the form and will automatically be configured to be required. You cannot configure this control to not be required.
2. If you want the control to only be visible when a new form is created, select the **Visible On New Forms Only** check box in the **Properties** pane.

Note: The CAPTCHA control is not supported when Microsoft Internet Explorer's Compatibility View is used.

Note: CAPTCHA controls are not rendered when natively printing a Unity Form or creating an image of a Unity Form from the **Send to | File** Unity Client option and then using the **Default/ TIFF Format** option.

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Headers and Footers

When using a Standard or Multi-Page template layout for Unity Form, header and footer controls are inserted by default. Headers and footers can contain Table, Repeater Section, Section, Radio Button Group, Select List, Text Box, Multiline Text Box, Check Box, Paragraph, and Submit Button controls. Keyword fields and Multi-Instance Keyword Groups can also be added to headers and footers.

When configuring a Workflow Form, Workflow Property fields can be placed in headers and footers.

Moving Form Controls

To move a control within a form in the Designer:

1. Hover over the control that you want to move until it is highlighted. An icon with four arrows will display when you hover on a control that can be moved.
2. Click the control and drag the control to the desired location in the form.

   The location where the control will be moved is denoted by a yellow area surrounded by a dashed line border. Release the mouse click when the control is in the correct location. The control will be moved to the new location.

To move a control within a table, you must perform the move action at the header of a column. The Move icon displays next to the header. By clicking the Move icon and dragging the header to a new location, the whole column will move to the new location.

When working with tables and repeating sections, controls within them cannot be moved outside of the repeating section or table they are in. They can only be moved within the repeating section or table.

Deleting Form Controls

To delete a control from a form:

1. Hover over the control that you want to delete until it is highlighted.
2. Click the Delete icon on the right-hand side of the control.

3. A message asking **Are you sure you want to delete the selected item?** is displayed. Click **OK** to complete the deletion. Click **Cancel** to abort the deletion.

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Saving a Draft of a Form Template

If you have worked on a Unity Form form template and you are not ready to publish it, but you want to save the progress you have made in designing the form template, you can save a draft of the form template. To save a draft of an open form template:

1. From the **Designer** ribbon, click **Save Draft**.
2. Enter a **Comment** about the draft in the field. There is a maximum of 250 characters allowed in this field.
3. Click **Save Draft**.

If you are working on a draft from an already published form template, to create a new draft of the form template:

1. From the **Designer** ribbon, click **Create Draft**.
2. Enter a **Comment** about the draft in the field.
3. Click **Create Draft**.

Note: All of the form template's elements must be valid in order for the draft to be saved.

Caution: If the **Template Name** or the **Ignore Change Prompt on Load** properties are edited in a draft of a form template, this will persist to the published version of the form template.

Discarding a Draft of a Form Template

You can discard a draft of a form template you no longer want to keep. When you discard the draft, the draft will be deleted and will not be available for use.

Note: If only a draft exists for the form template and the form template has never been published, the form template will be deleted completely when the draft of the form template is discarded.

To discard a draft:

1. Open the draft version of the form template for which you want to delete the draft.
2. Click the **Discard Draft** button in the ribbon. A message stating **You are about to discard the current form template draft. Discarding the draft will remove it from the designer and it will no longer be available to users editing the form. Are you sure you would like to discard the current draft?** is displayed.
3. Click **Discard** to discard the draft. Upon discarding a draft that has a corresponding published version, the published form template will be displayed in the designer.

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Renaming Form Templates

You can rename form templates. To rename a form template:

1. With the form template open, select the **Form Properties** tab.
2. Enter the new name of the form template in the **Template Name** field. A value for this field is required.
3. Republish the form template.

Adding Page Breaks for Image Conversion

You can configure a form to have a page break between configure form pages during image conversion and when printing. To configure page breaks between each page tab configured for a form during image conversion and printing:

1. With the form template open, select the **Form Properties** tab.
2. Select **Add Page Breaks During Image Conversion**.

Identifying the Form Target Type for a Form Template

If you need to identify what form target type a form template is using, you can view this in the **Form Properties** tab. A read-only **Form Target** property displays the form target used for the form template.

Copying Form Templates

An existing form template can be copied and used as the base for a new form template.

Note: You cannot change the theme of the form template that is created from the original form template. The theme of the original form template is used as the theme for the copied form template.

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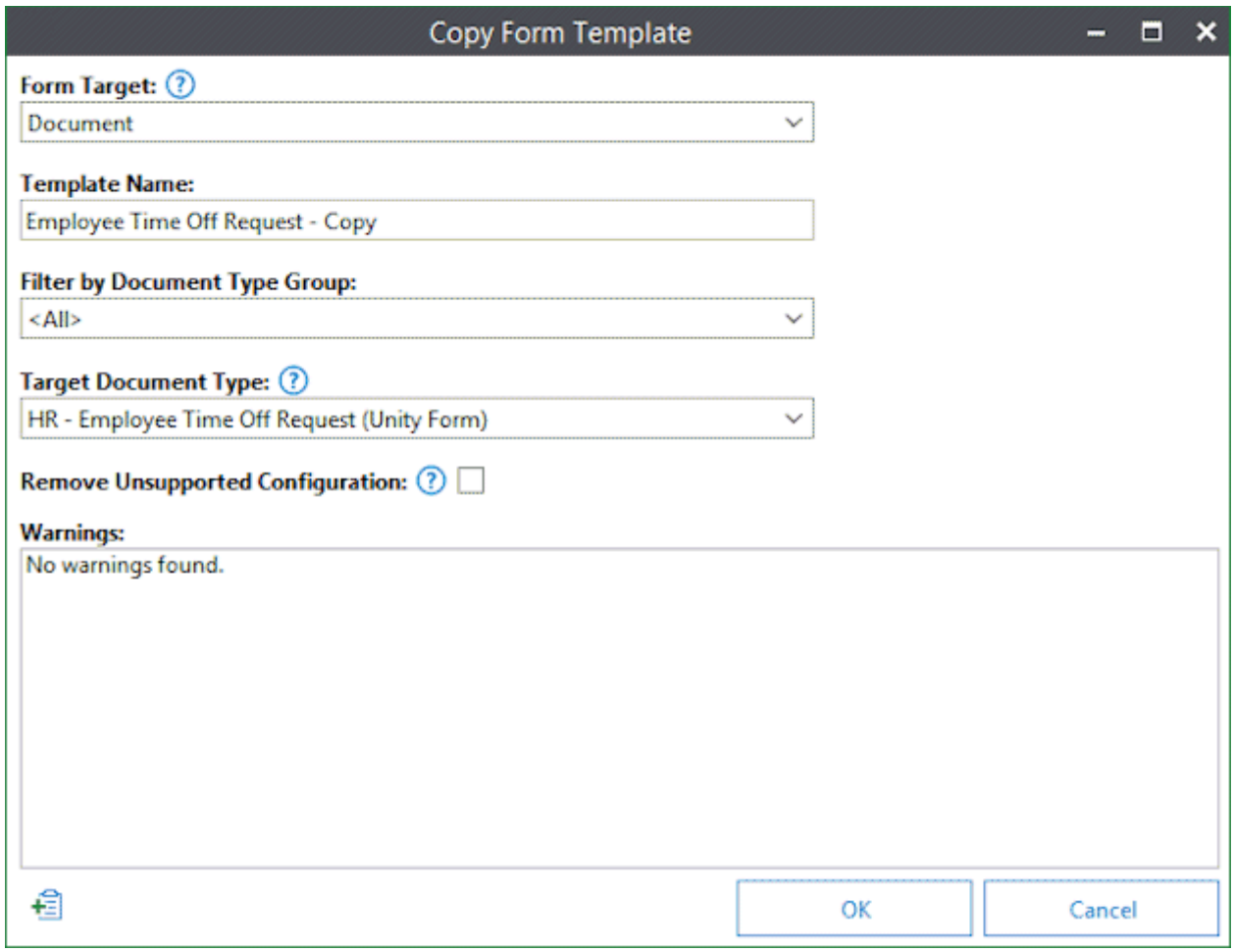
To copy a form template:

1. Open the form template that you want to copy.
2. Click **Copy** in the **Template** ribbon group. The **Copy Form Template** dialog box is displayed.



3. From the **Form Target** drop-down list, select the type of object that is created when an end user submits a form of this form template type.

Note: If you are not licensed for Workflow, the **Form Target** drop-down list is not displayed and the **Form Target** is set to **Document**.

- Select **Document** to configure the form template to create forms as documents.
- Select **Workflow** to configure the form template to create forms as Workflow objects.

Note the following limitations related to this action:

- To be able to configure Workflow form templates, you must be licensed for Workflow.
- You must have either the **All Life Cycles** or **Assigned Life Cycles Workflow Configuration** User Group configuration right. For more information, see the **System Administration** module reference guide.

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- Workflow forms can only be configured within the **Create HTML Form (Unity Form)** Workflow action in OnBase Studio. For more information, see the **OnBase Studio** module reference guide.

4. Edit the name of the form template in the **Template Name** field to reflect the name of the new form template. The default **Template Name** is the name of the form that you copied with the suffix **- Copy**.

Note: This field is limited to 80 characters of user input.

5. Select a Document Type Group from the **Filter by Document Type Group** drop-down list to narrow the Document Types available for selection.
6. Select the Document Type from the **Target Document Type** drop-down list. This is the Document Type forms created from the form template are archived under.

Note: If you change the Document Type, the Keyword Types and Multi-Instance Keyword Type Groups that were assigned to the original form template may not be assigned to the copied form template. For more information, see Considerations for System Property and Field Source Conversions on page 107 .

7. Select **Remove Unsupported Configuration** to automatically remove controls copied from the original form template that are not supported on this form template. Controls that are children of the unsupported control as well as references to the unsupported control will be removed.
8. Correct any warnings that are displayed in the **Warnings** section of the **Copy Form Template** dialog box before copying the form template.

   To copy the warning text to the clipboard, click the **Copy to Clipboard** icon in the bottom-right corner of the dialog box.
9. Click **OK**. The original form template is copied to a new form template with the configured changes.

Note: Form visibility settings are not copied from the original template to the newly created template and the **Display for creation for all user groups** option is reset. To change the visibility settings of a form template, see Setting Form Visibility on page 175.

Considerations for System Property and Field Source Conversions

If you copy a form template and the target type changes from the original template's form target, system properties and field sources are automatically converted.

When copying a form template from a **Workflow** form target to a **Document** form target, the **Work Item ID** system property will be converted to the **Document Handle** system property and the **Work Item Date** system property will be converted to the **Document Date** system property. When copying from a **Document** form target to a **Workflow** form target, The **Document Handle** system property is converted to the **Work Item ID** system property and the **Document Date** system property is converted to the **Work Item Date** system property.

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When copying a form template from a **Document** form target to a **Workflow** form target template, if a field or repeating section has a field source of **Disk Group (XML)**, it will be converted to the **Temporary** field source. When copying a form template from a **Workflow** form target to a **Document** form target, if a field or repeating section has a field source of **Temporary**, it will be converted to the **Disk Group (XML)** field source.

If you are copying a form template and you change the Document Type associated with the new copy, all of the same Keyword Types/Multi-Instance Keyword Type Groups may not be assigned to the new form template's Document Type. When a field source is a Keyword Type/Multi-Instance Keyword Type Group that does not exist in the Document Type selected, these Keyword Type/Multi-Instance Keyword Type Group fields will be converted to the **Temporary** field source for **Workflow** form templates and the **Disk Group (XML)** field source for **Document** form templates.

Note: Auto-increment Keyword Types cannot be converted and will be identified as unsupported controls.

Considerations for Copying Custom Actions

If you copy a form template using another form target type and a custom action contains a condition that is not supported by the new form template's form target type, a warning message is displayed. If **Remove Unsupported Configuration** is selected, the unsupported condition is automatically removed when the form template is copied. If an unsupported condition is within a group, the entire group is removed if there is not another valid condition in the group.

Removing unsupported conditions using the **Remove Unsupported Configuration** option could cause custom actions to become invalid. If a custom action that contains an unsupported condition is still a valid custom action in the new form target type, the custom action is copied to the new form template without a condition. It is a best practice to review and test custom actions after unsupported conditions are removed before publishing the new form template copy.

Editing and Publishing Forms

You can edit a previously published form template and republish it or edit a draft of a form template. When a template is open, it is locked and cannot be edited by another user. Only the user who currently has the template open will be able to modify the template until they close the template, close the forms Designer, or release the lock manually via the **Manage Locks** function within the Unity Client.

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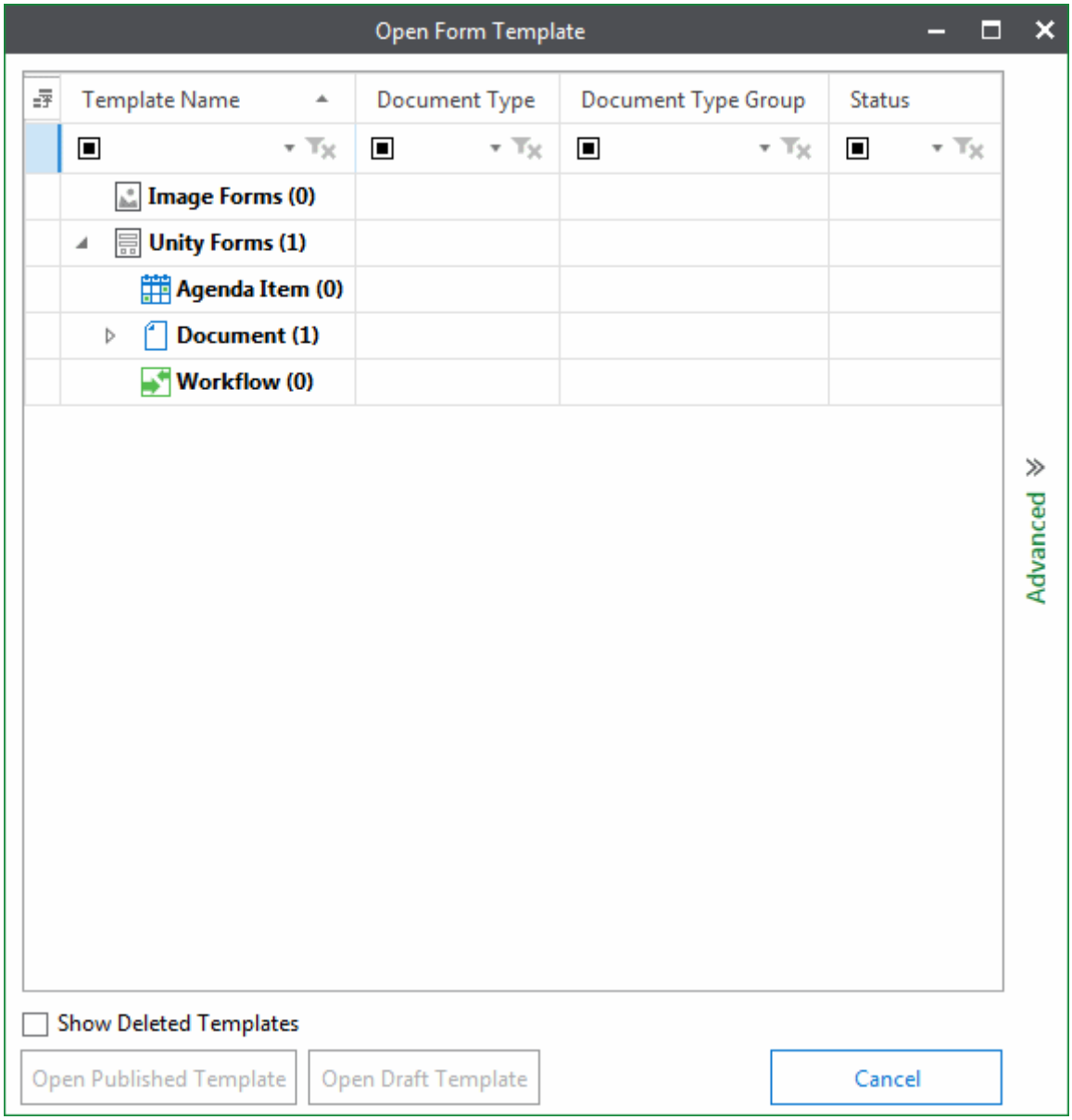
Opening Form Templates

In order to make any changes to existing forms, you must open the form you want to work on. To access an existing form:

1. In the **Designer** tab, click **Open**. The **Open Form Template** dialog box is displayed.



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2. Expand the form type category to see the form templates configured within that category.

   The form type categories you can choose from under the **Unity Forms** category are **Document**, **Workflow**, and **Agenda Item**.

Note: You must be licensed for Image Forms, Agenda Items, or Workflow for their respective categories to be displayed in the **Template Name** column of the **Open Form Template** dialog box.

3. Select the form template you want to access.
4. Click **Open Published Template** or click **Open Draft Template**. depending on what status of the form you want to access. See Understanding Available Form Statuses on page 110.

   Alternately, you can double-click on the form template name to open the form template. If there is a published version of the form template, it is opened. If there is no published version of the form template, the draft version is opened. Upon opening the form template, you can edit it. For more information on editing and republishing, see Editing and Republishing Form Templates on page 116

Note: In order to create a new form from the newly published form template, the Client must be restarted.

Understanding Available Form Statuses

If you only have a published version of the form template available, the **Open Draft Template** button is disabled. If you only have a draft version of the form template available, the **Open Published Template** button is disabled. If both buttons are available for the selected form template, you can select either one depending on if you want to work on the published version of the form or the draft version of the form.

In the **Status** column, an icon is displayed for each version type the form has. If a draft version is available, the **Draft** icon is displayed.

If a published version is available, the **Published** icon is displayed.

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If the **Show Deleted Templates** option in the bottom-left corner of the **Open Form Template** dialog box is selected, deleted form templates are displayed. The **Deleted** icon is displayed for deleted form templates.

Note: Deleted form templates are also distinct due to their darker background as compared to active form templates, which have white backgrounds.

Using Columns to Find Form Templates

You can enter text in the fields above each column to locate specific templates. You can use columns to find form templates in the following ways:

- Enter text that is contained in the form's **Template Name**, **Document Type**, **Document Type Group,** or **Status** to find a form. The form templates displayed are narrowed to those templates containing the entered text.
- Click the arrow to the right of the text field to display a drop-down list that contains predefined search options.
- Change the search parameters by clicking the icon next to the text field above a column. Clicking the icon displays a drop-down list that contains search parameters that further narrow the search. The default parameter is set to **Contains**.
- You can resize columns to show more or less of the text in the columns. When the **Open Form Template** dialog box is closed, the changes made to the size and visibility of the columns are saved.
- To show or hide columns, click on the **Column Chooser** icon in the top-right corner of the **Open Form Template** dialog box. The **Column Chooser** dialog box is displayed to the left of the **Open Form Template** dialog box. You can select or deselect columns in order to show or hide them. All columns are selected by default.

Note: You cannot hide the **Template Name** column.

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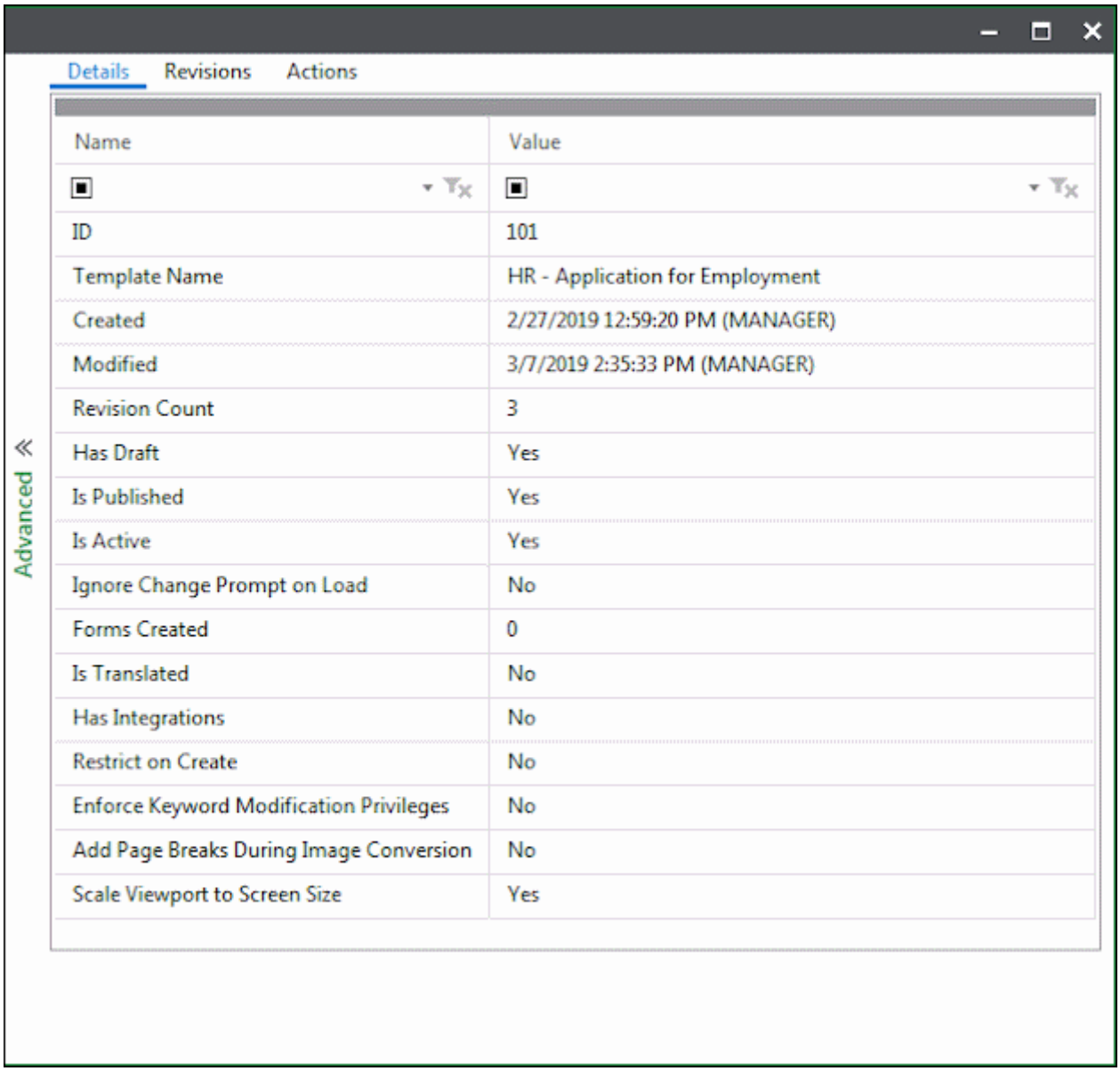
Accessing Form Template Details, Revisions, and Performing Actions

For more options when working with form templates, you can click on the double arrows above **Advanced** on the right side of the **Open Form Template** dialog box. The **Open Form Template** dialog box is expanded to the right to display the **Advanced** tab.



The **Details**, **Revisions**, and **Actions** tabs are contained within the **Advanced** pane. These tabs contain information and the ability to perform specific actions on form templates.

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Viewing Form Template Details

This tab displays information about the selected form template. There are two columns in this tab: the **Name** column and the **Value** column. The **Name** column contains the name of the property. The **Value** column displays how its corresponding property is configured.

Viewing Revisions

This tab displays a list of revisions for the selected form template. When a form template is published or saved as a draft, it is given a revision number. The revisions list is in descending order by default so that the most recent revision is the first revision listed. You can change the revisions list order when needed. The most recent published revision is the revision that users can access. The published revision that users can access to create forms is also shown under the form template name in the **Open Form Template** dialog box.

Five columns are displayed in this tab: **Revision**, **Status**, **Created By**, **Created**, and **Comment**. These columns can be shown or hidden by clicking the **Column Chooser** icon in the top-left corner of this tab. In the **Column Chooser** dialog box, you can show or hide columns.

Note: If no comment was written for a revision, you can add one by clicking the **Click to add a comment.** link in the **Comment column**. A dialog box is displayed where you can write a comment for that revision.

Double-click on a revision from the revisions list to open it in the **Designer** pane.

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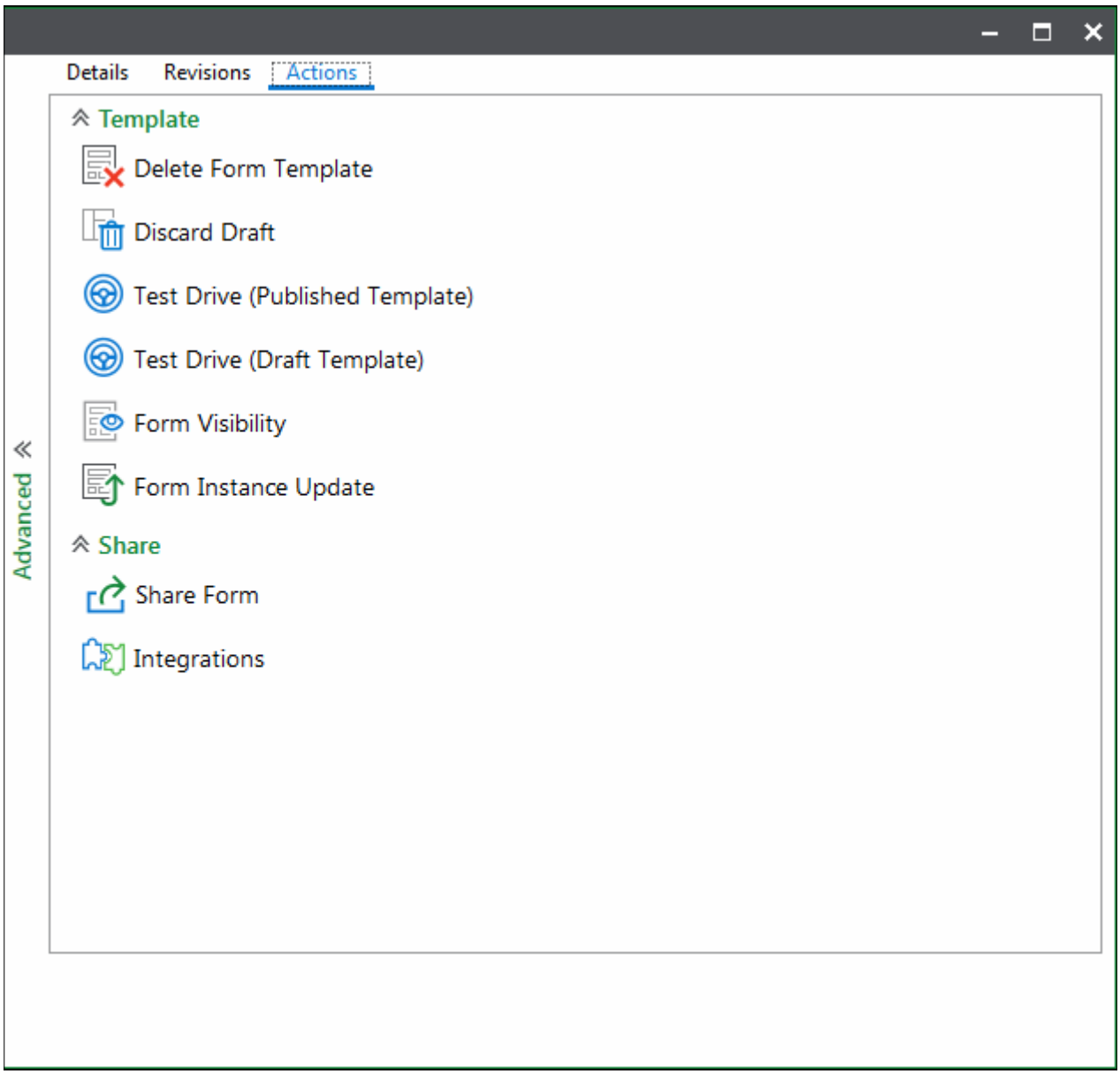
Performing Actions on Form Templates

The **Actions** tab displays buttons allowing you to perform certain actions on the selected form template from the **Open Form Template** dialog box. There are two collapsible sections in this tab: the **Template** section and the **Share** section.

Tip: You can hover over each action to see a tooltip that briefly explains what that action does. Tooltips are also displayed when you hover over disabled actions that explain why the certain action is disabled.



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Deleting Form Templates

The **Delete Form Template** action deletes the selected form template. The deleted form template is no longer available to users creating new forms. To delete a form template:

1. In the **Open Form Template** dialog box, select the form template you want to delete.
2. In the **Advanced** pane, click **Delete Form Template**.
3. Before the form template is deleted, a message stating **You are about to Delete the current form template. Deleting a form template will remove it from the designer and it will no longer be available to users filling out new forms. Are you sure you would like to Delete the form template?** is displayed. Click **Delete** to delete the form template.

Restoring Template

The **Restore Template** action restores a form template from having a status of **Deleted**. This action is only displayed when the selected form template has a status of **Deleted**.

To be able to select and restore deleted form templates, select the **Show Deleted Templates** option in the bottom-left corner of the **Open Form Template** dialog box.

To restore a form template:

1. In the **Open Form Template** dialog box, select the form template you want to restore.
2. In the **Advanced** pane, click **Restore Template**.

Discarding Drafts

The **Discard Draft** action discards the selected form template draft. The published version of the form template is still available to edit. To discard a draft of a form template:

1. In the **Open Form Template** dialog box, select the form template for which you want to discard the current draft.
2. In the **Advanced** pane, click **Discard Draft**.
3. Before the draft is deleted, a message stating **You are about to discard the current form template draft. Discarding the draft will remove it from the designer and it will no longer be available to users editing the form. Are you sure you would like to discard the current draft?** is displayed. Click **Discard** to discard the draft.

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Test Driving Published Templates

The **Test Drive (Published Template)** action opens the **Test Drive** dialog box and displays the selected published form template. You can test the form functionality and security settings of the published form template from this dialog box.

For more information on test driving form templates, see Test Driving Forms on page 165.

Test Drive (Draft Template)

The **Test Drive (Draft Template)** action opens the Test Drive dialog box that displays the saved draft of the selected form template. You can test the form functionality and security settings of the saved draft of the form template without publishing the draft.

For more information on test driving form templates, see Test Driving Forms on page 165.

Form Visibility

This action opens the **Form Visibility** dialog box. From this dialog box, you can manage user access to forms. For more information on Form Visibility, see Setting Form Visibility on page 175.

Form Instance Update

This action opens the **Form Instance Update Configuration** dialog box. For more information on configuring form instance updates, see Updating Form Instances on page 117

Share Forms

This actions opens the Share Form dialog box. For more information on sharing forms, see Sharing Forms on page 170.

Integrations

This actions opens the Integrations dialog box. For more information on configuring form integrations, see Configuring Unity Form Integrations on page 176.

Editing and Republishing Form Templates

You can edit and republish a revision of a form template. In some cases, you may want to have a previously published form template used to create the new published form template that users can access to create forms.

To republish a form template:

1. With the appropriate form template opened and after making the appropriate changes, click **Publish** from the ribbon.
2. Click **Publish** to republish the form template.

When you republish a form template, a new revision of the form template is created. All new forms that users create use the latest revision of the form template. Any forms that were created using an older revision of the format template are displayed using the revision of the form template they were created with.

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If you attempt to publish a template that has been locked by another user, a message stating **Publish failed. Your changes were not saved.** is displayed. You cannot publish a form template when another user is publishing the same form template.

If you attempt to publish a form template from a published version of a form template that has a draft version of the template, a message stating **This form contains a saved draft. Publishing the form will overwrite the saved draft. Are you sure you would like to publish the form?** is displayed. Upon clicking **Publish,** the draft is removed.

Updating Form Instances

You can update the revision of a form template that forms are using for display. Before updating form instances, ensure that the template is not locked. In addition, any form document that is locked cannot be updated with a form instance update.

Caution: It is recommended that you backup your database in the event you need to roll back your updates. It is also recommended that updates be run at off hours for optimal performance.

To access the Form Instance Update functionality:

1. In the **Designer** tab, click **Open**. The **Open Form** Template dialog box is displayed
2. Click on the double arrows above **Advanced** on the right side of the **Open Form Template** dialog box. The **Open Form Template** dialog box is expanded to the right to display the **Advanced** tab.
3. Select the **Actions** tab.

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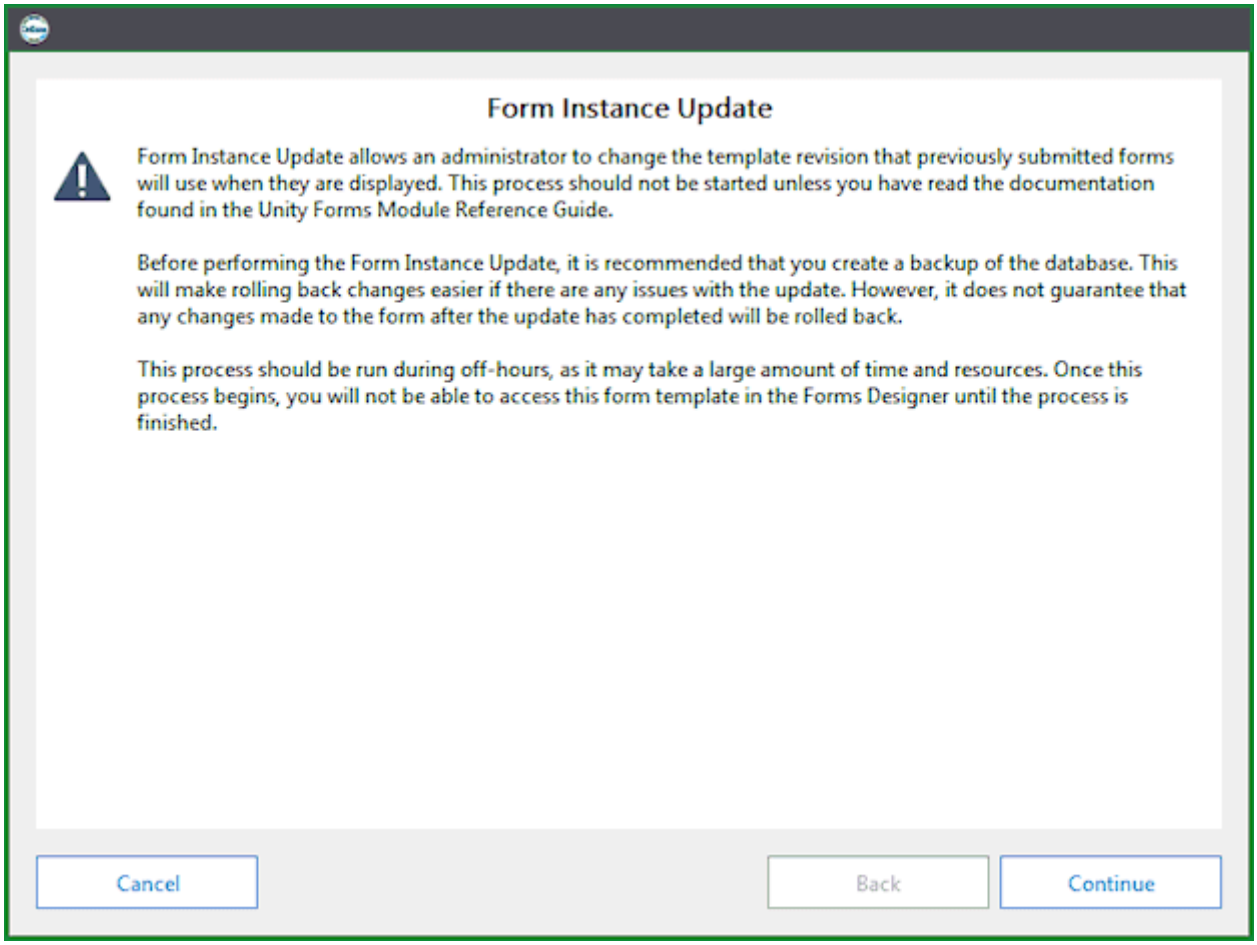
4. Select **Form Instance Update**. The **Form Instance Update** wizard is displayed.



5. Click **Continue**.

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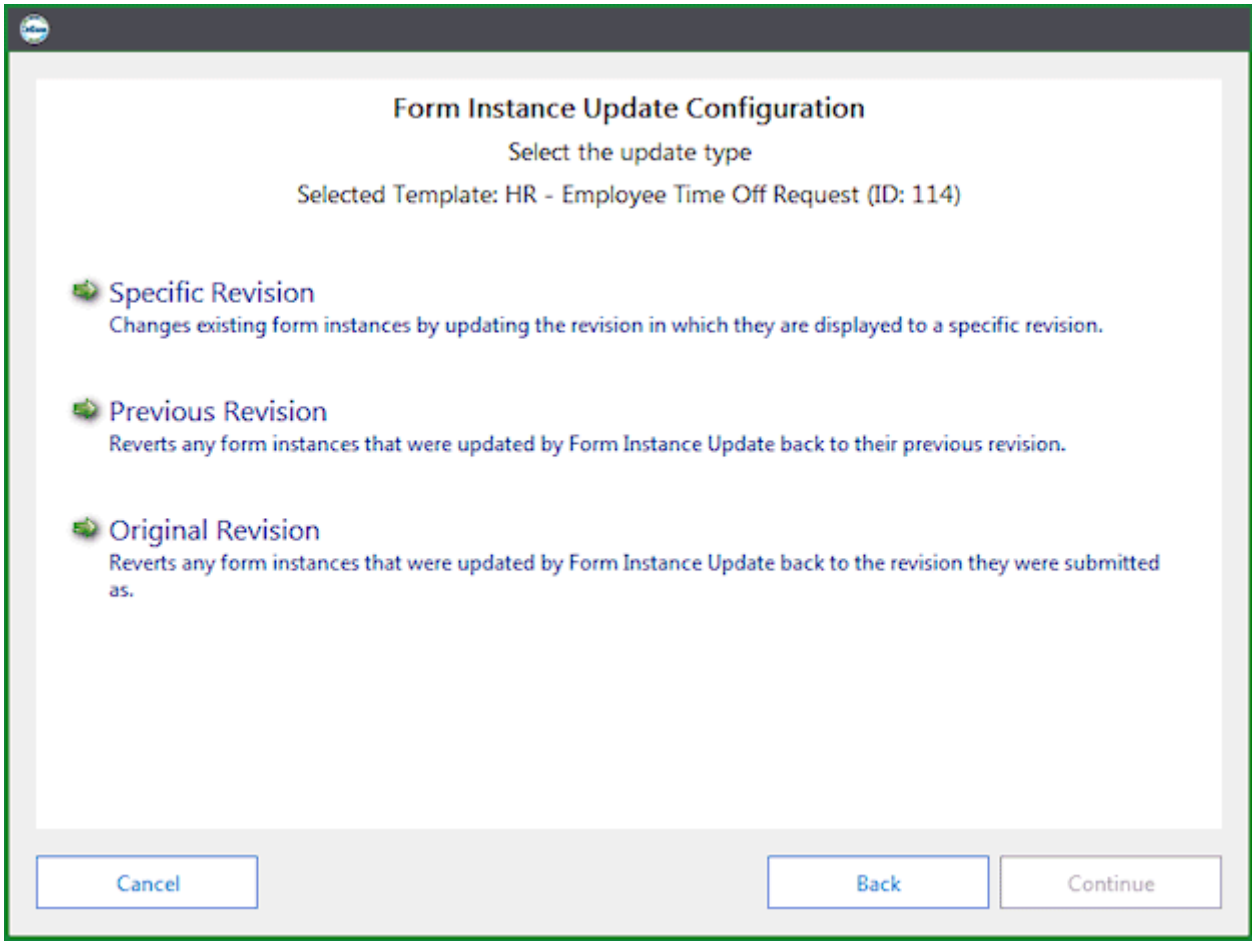

6. From the Form Instance Update wizard, you can perform the following actions:
   - Updating to a Specific Revision on page 120
   - Updating to a Previous Revision on page 123
   - Updating to the Original Revision on page 125

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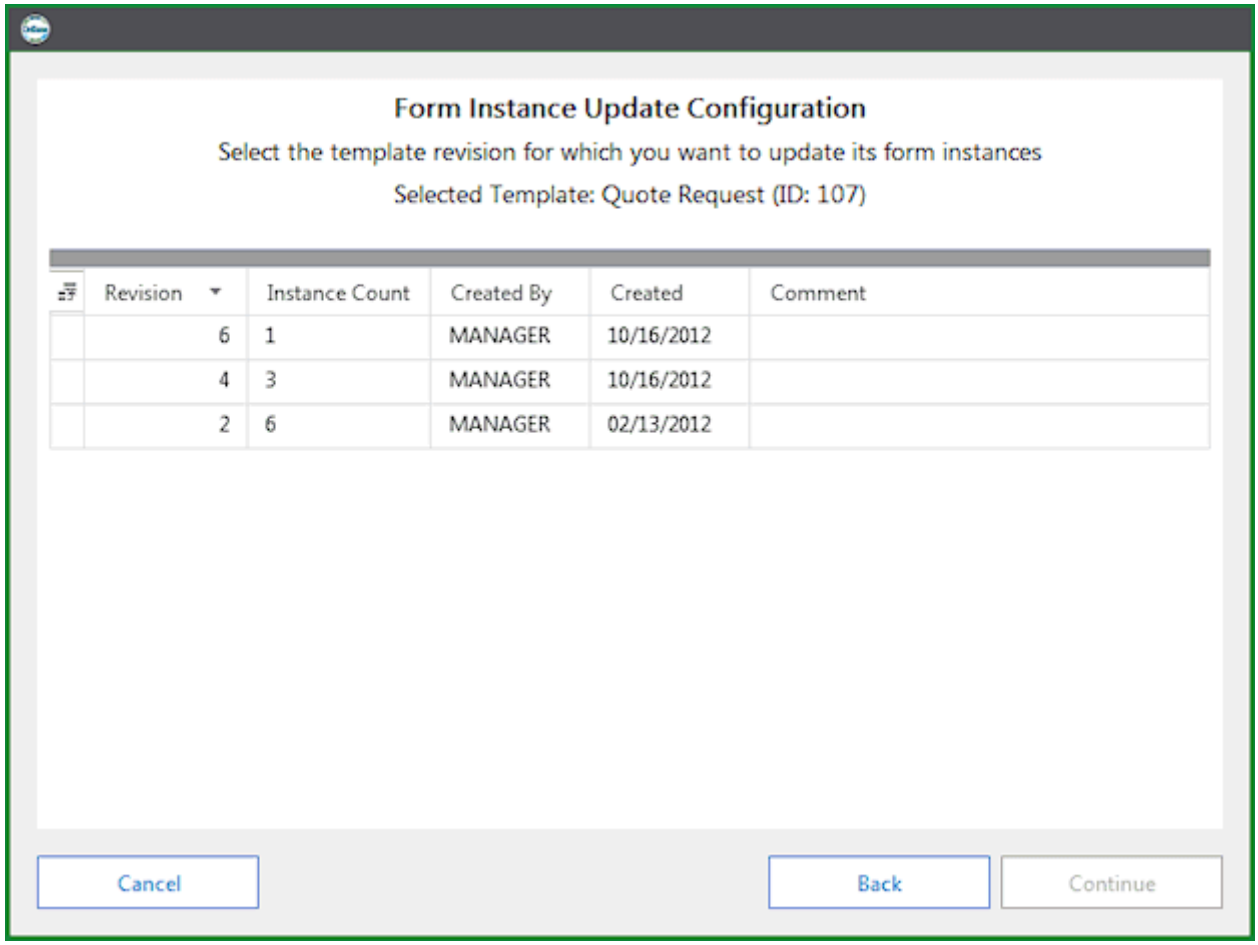
Updating to a Specific Revision

You can pick specific form instances to update to a specific version of a form template. To update instances to a specific form template:

1. From the **Form Instance Update Configuration** wizard, click **Specific Revision**.



2. Select the form template revision for which you would like to update its instances.

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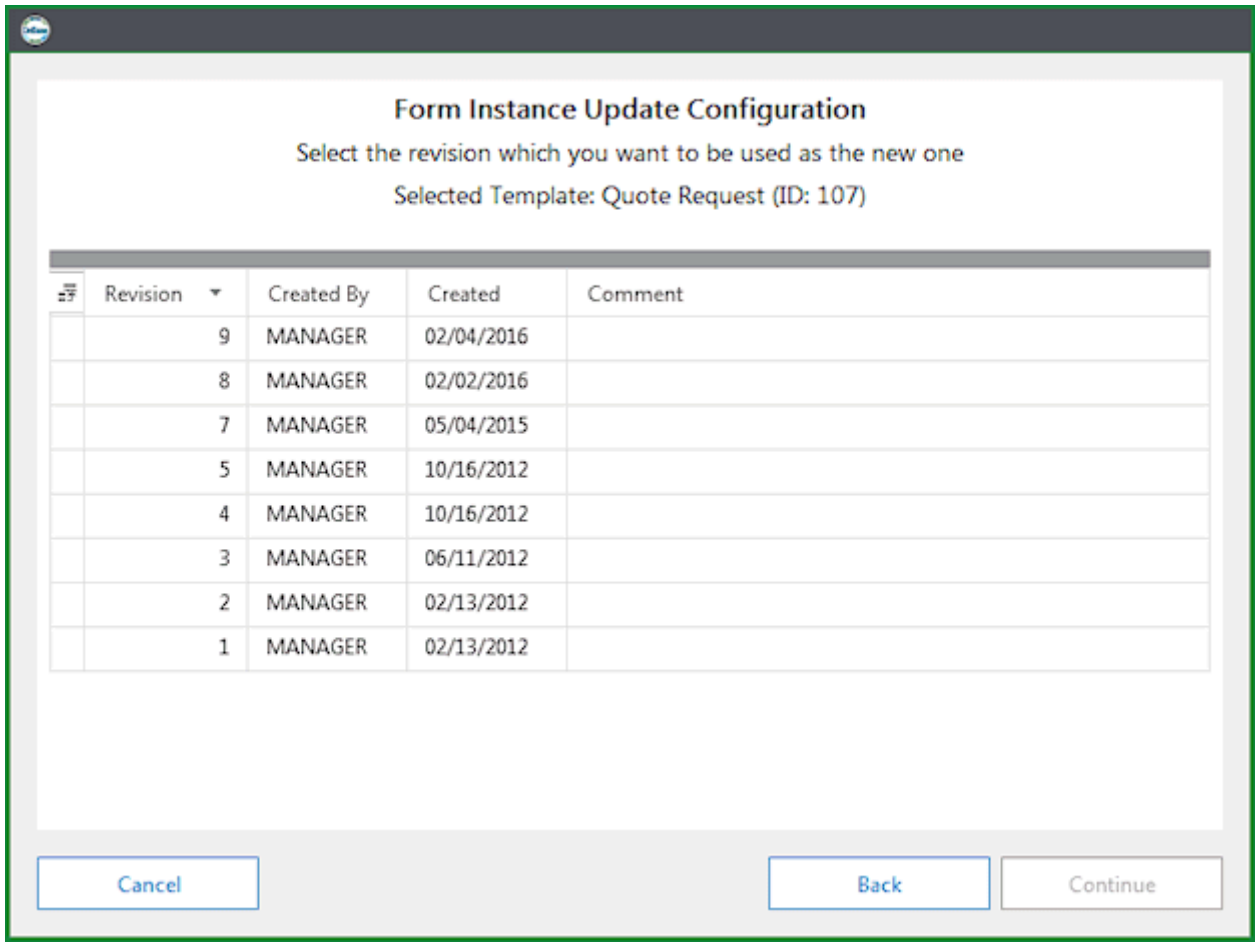
3. Click **Continue**.



4. Select the form template revision you want to use to update the selected instances.
5. Click **Continue**.
6. A **Validation** screen will display any warnings or errors that are encountered while trying to update the selected form instances. If you encounter an error, you will not be able to complete the update. You can continue with warnings, but review these warnings to ensure these changes are acceptable for your solution. If no issues were found, a message stating **No issues were found for this form instance update process.** is displayed.

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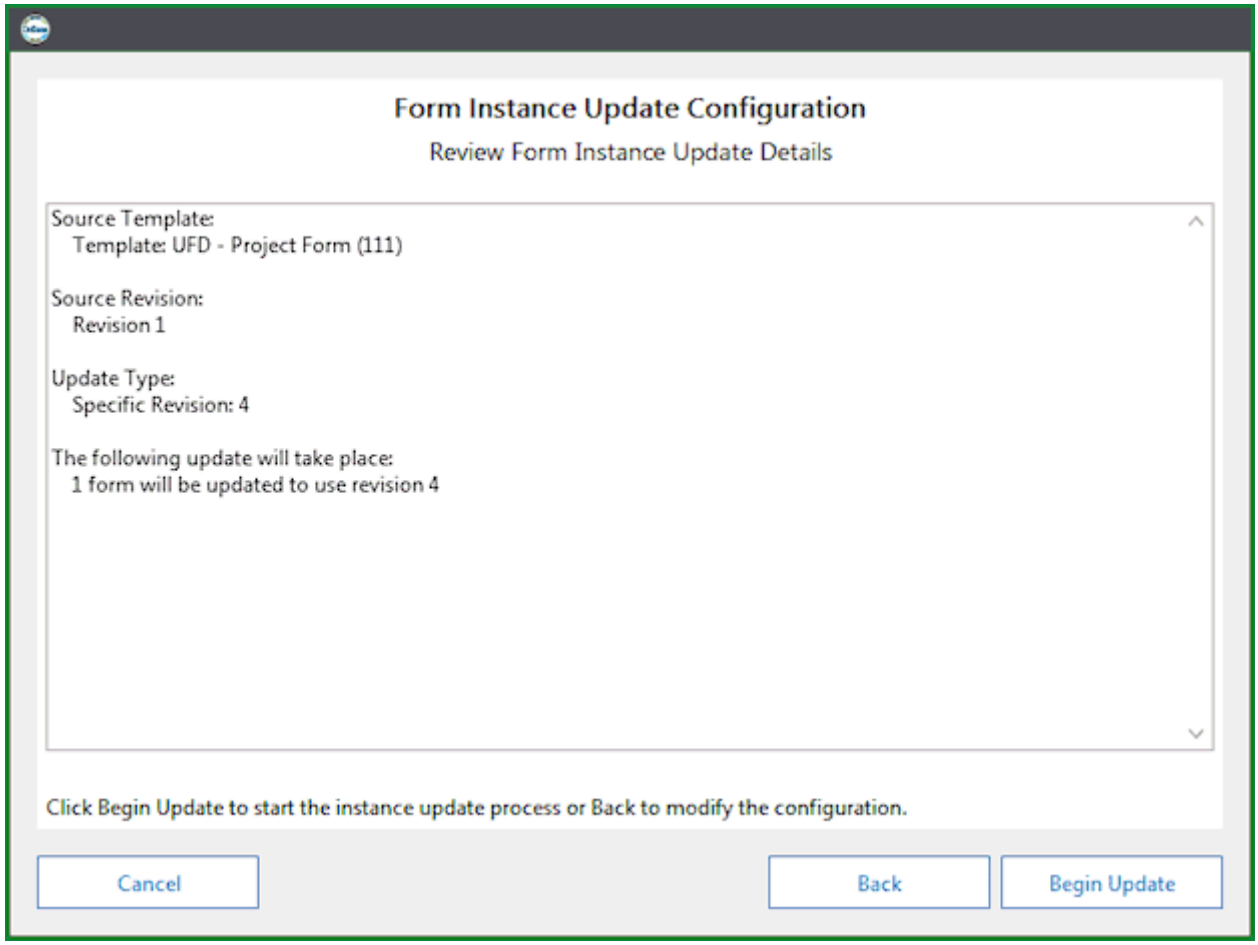
7. Click **Continue**. A review screen is displayed. If you need to edit your update parameters, click **Back**.



8. To complete the update, click **Begin Update**.
9. Upon successful completion, a screen displayed noting the process is complete and a provides a link to the verification report for the process. Click on the link to access the verification report.
10. When finished, click **Finish**.

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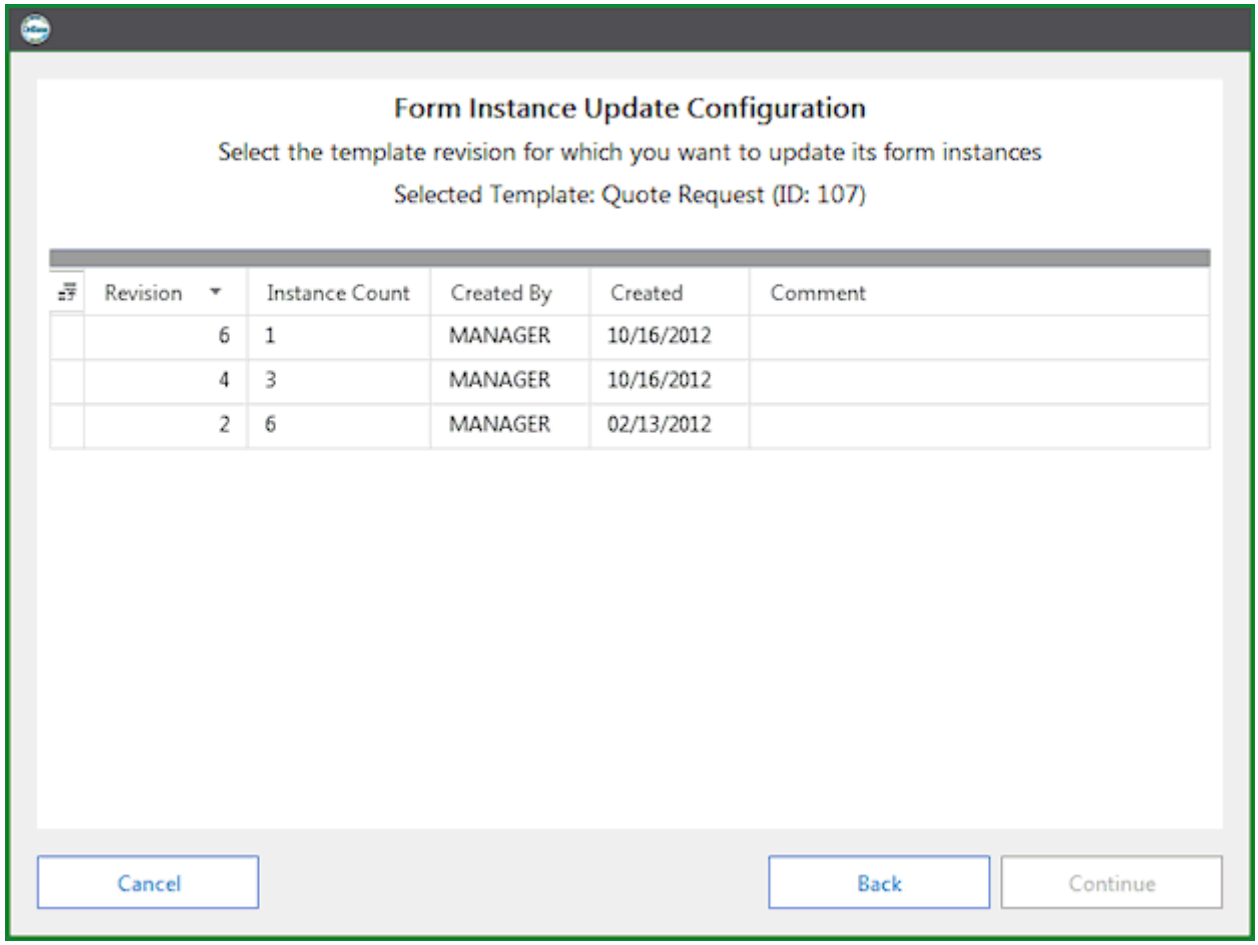
Updating to a Previous Revision

You can pick specific form instances to revert to the previous version of a form template. To update instances to the previous form template:

1. From the **Form Instance Update Configuration** wizard, click **Previous Revision**.
2. Select the form template revision for which you would like to update its instances to their previous template revision.



3. Click **Continue**.
4. A **Validation** screen will display any warnings or errors that are encountered while trying to update the selected form instances. If you encounter an error, you will not be able to complete the update. You can continue with warnings, but review these warnings to ensure these changes are acceptable for your solution.If no issues were found, a message stating **No issues were found for this form instance update process.** is displayed.

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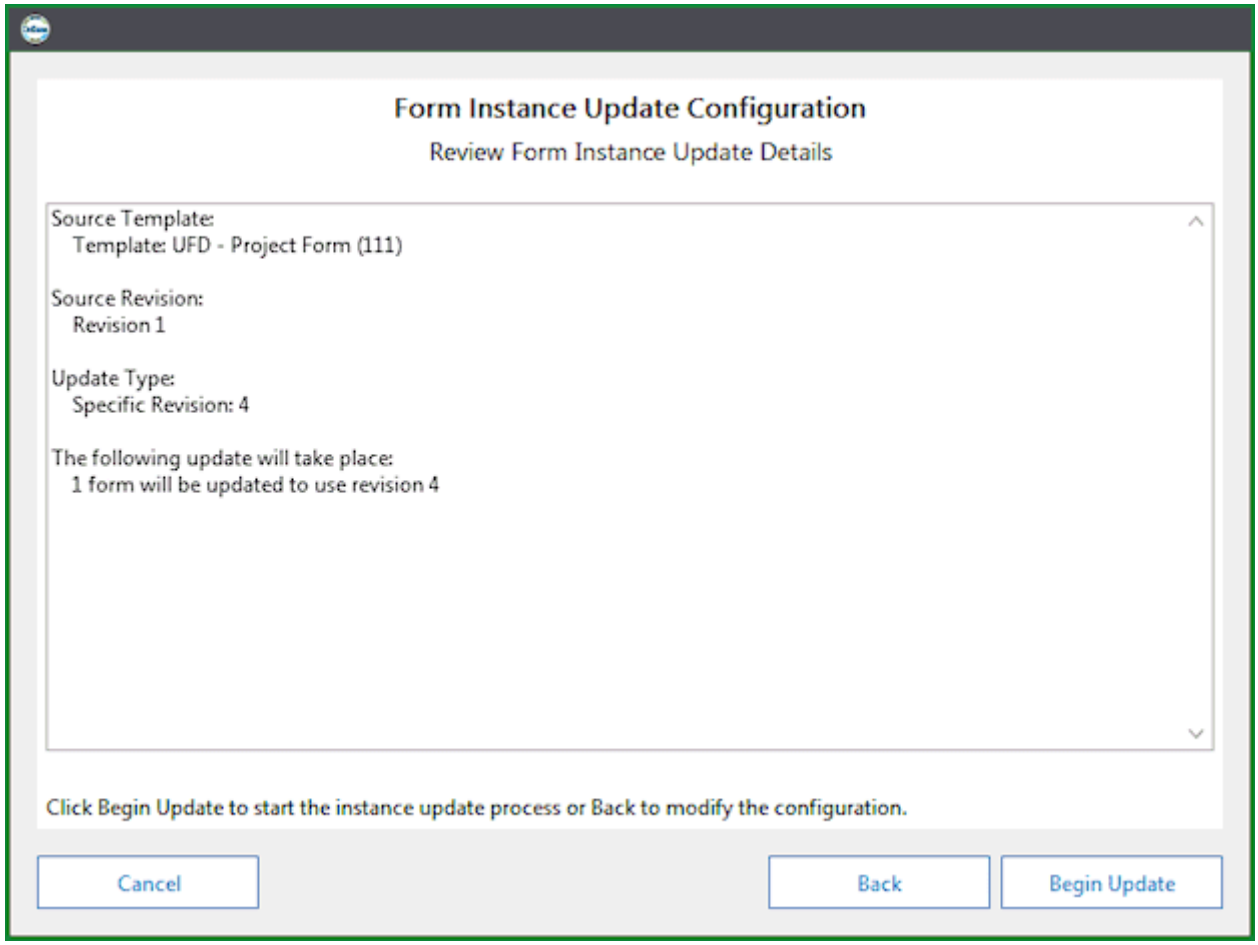
5. Click **Continue**. A review screen is displayed. If you need to edit your update parameters, click **Back**.



6. To complete the update, click **Begin Update**.
7. Upon successful completion, a screen displayed noting the process is complete and a provides a link to the verification report for the process. Click on the link to access the verification report.
8. When finished, click **Finish**.

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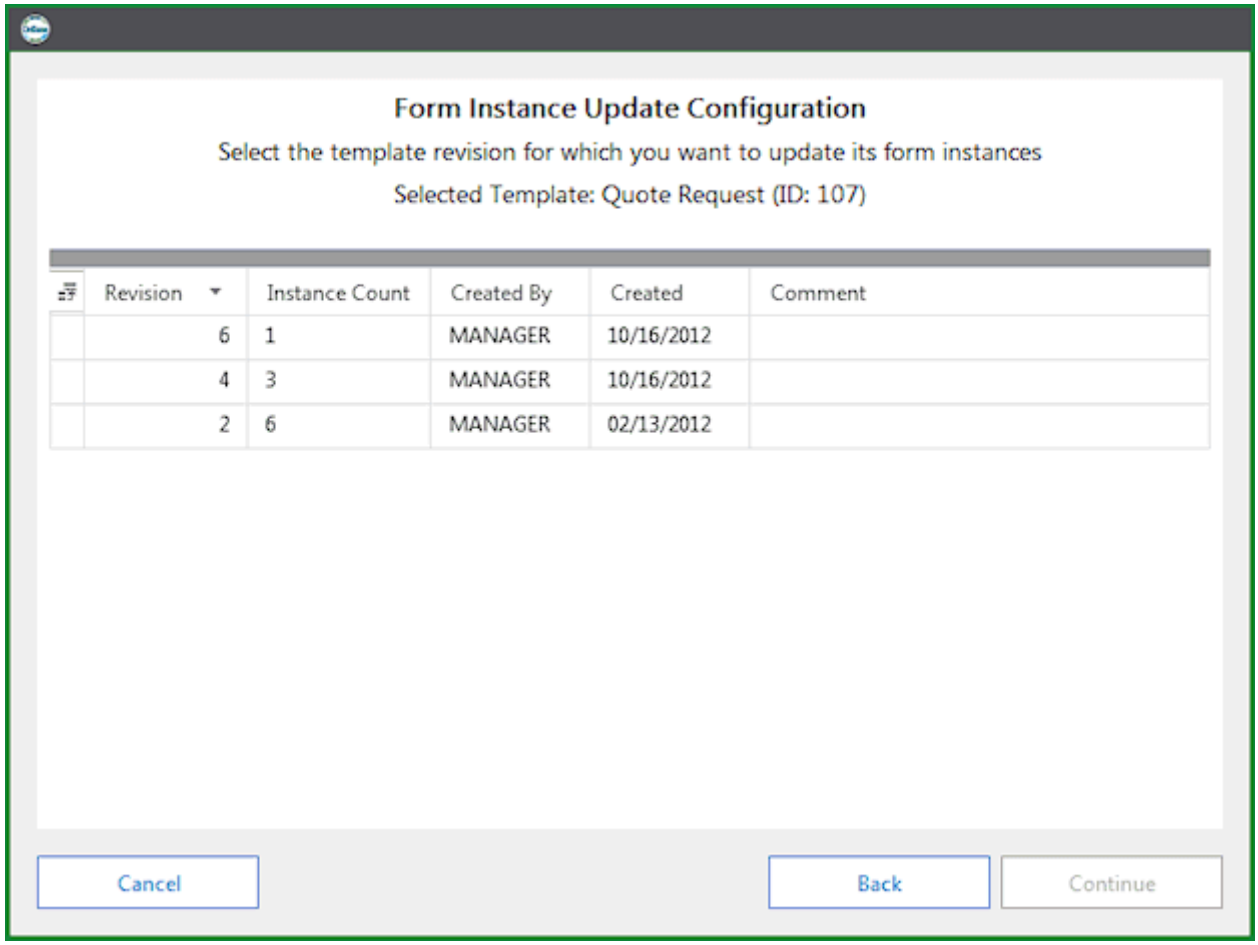
Updating to the Original Revision

You can pick specific form instances to update to update them to the original form template. To update instances to their original form template:

1. From the **Form Instance Update Configuration** wizard, click **Original Revision**.
2. Select the form template revision for which you would like to update its instances to their original template revision.



3. Click **Continue**.
4. A **Validation** screen will display any warnings or errors that are encountered while trying to update the selected form instances. If you encounter an error, you will not be able to complete the update. You can continue with warnings, but review these warnings to ensure these changes are acceptable for your solution.If no issues were found, a message stating **No issues were found for this form instance update process.** is displayed.

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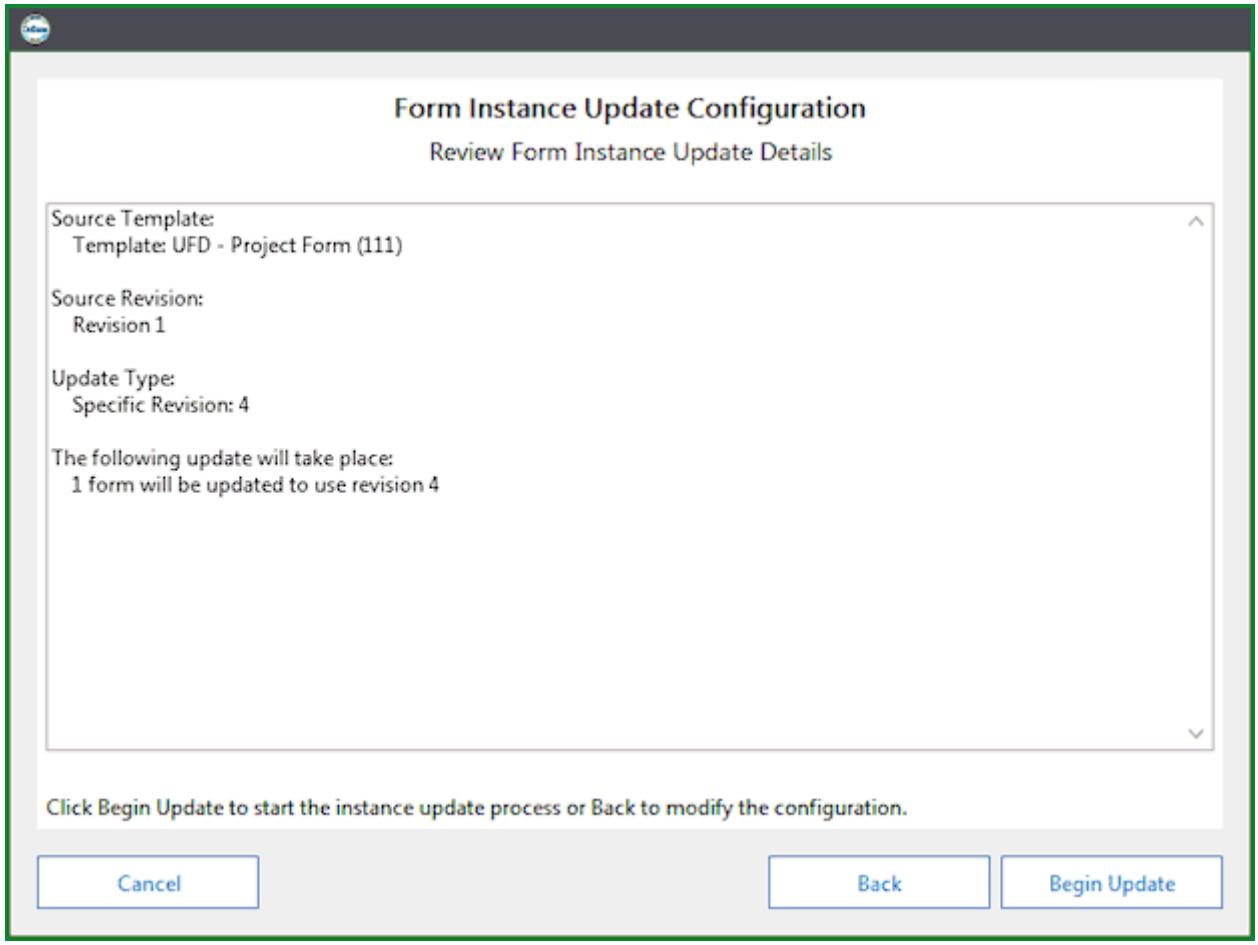
5. Click **Continue**. A review screen is displayed. If you need to edit your update parameters, click **Back**.



6. To complete the update, click **Begin Update**.
7. Upon successful completion, a screen displayed noting the process is complete and a provides a link to the verification report for the process. Click on the link to access the verification report.
8. When finished, click **Finish**.

Deleting Templates

If you no longer need a template, you can delete it. Once a template is deleted, new forms cannot be created using the deleted template.

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To delete a template:

1. Open the template that you want to delete in the Forms Designer.
1. In the ribbon, click **Delete**. A message stating **You are about to Delete the current form template. Deleting a form template will remove it from the designer and it will no longer be available to users filling out new forms. Are you sure you would like to Delete the form template?** is displayed.
2. To continue with the deletion, click **Delete**. The form will be deleted and will not be available.

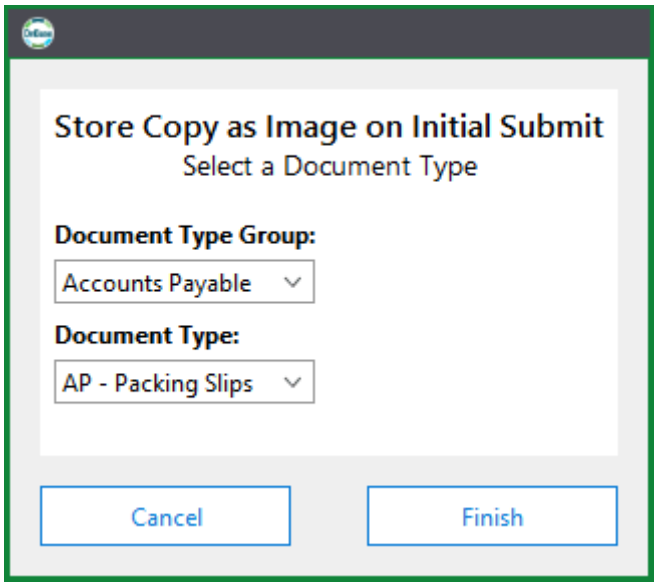
Note: If a template is deleted that is associated with a shared form, the shared form will not be accessible.

Note: When a draft of a template is open or you have just saved a draft of the opened published template, the **Delete** button is not enabled.

Storing Copies of Forms as Images

You can configure a Form template to store a copy of submitted forms as images within OnBase. To configure a Form template to store an image copy:

1. With the form open, select the **Form Properties** tab.
2. Select **Store Copy as Image on Initial Submit**.
3. If you would like to stop the form submission if the image copy conversion fails and cannot be stored, select **Stop Form Submission on Error**.
4. You can change the Document Type in which the image is stored in by clicking the edit button next to the **Document Type** field.



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5. Select the **Document Type Group** that contains the Document Type you want to store the image copies within.
6. Select the **Document Type** you want to store the image copies within.
7. Click **Finish**.

Ignoring Automatic Changes

Some forms may be configured with actions that run upon loading the form. When the form is retrieved and opened, the form will run the conditions and run actions that may change the values of fields on the form. When this happens, the user is prompted to save changes automatically made to the form, even if they didn't make any manual changes to the form. You can have the form ignore the automatic changes and not prompt the user. To configure a form to ignore automatic changes and not prompt a user to save the form:

1. With the form open, select the **Form Properties** tab.
2. Select the **Ignore Change Prompt on Load** option.
3. Republish the form.

Note: This setting will affect all revisions of a form.

Theme Designer

The Theme Designer allows you to define the colors used for various form parts.

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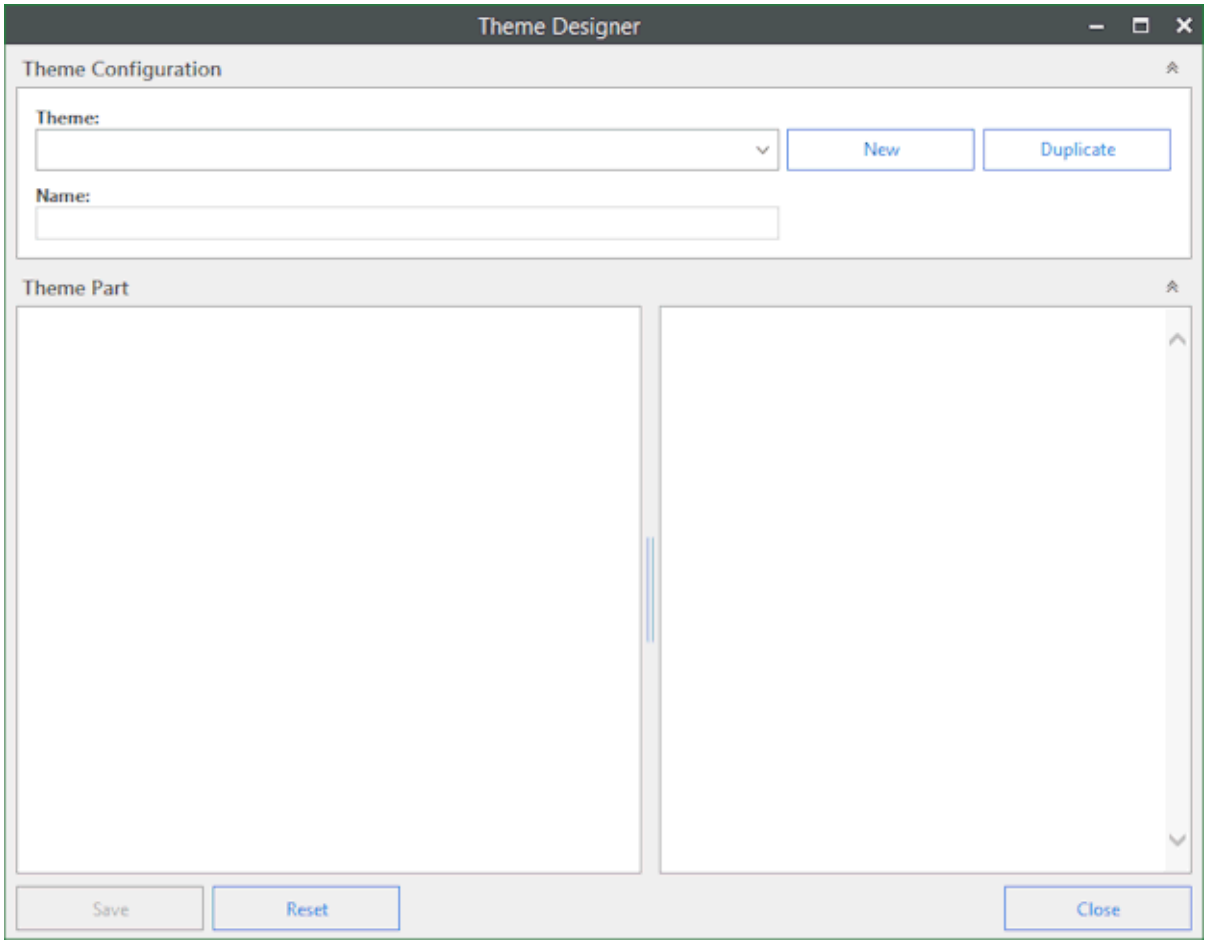
Configuring Themes

To create and configure themes:

1. In the **Designer** tab, click **Theme Designer** in the **Manage** Ribbon Group. The **Theme Designer** dialog box is displayed.for more information about theme part options



2. Click **New** to create a new theme. Alternatively, you can select a theme from the **Theme** drop-down list and click **Duplicate** to create a copy of an existing theme that you can change.

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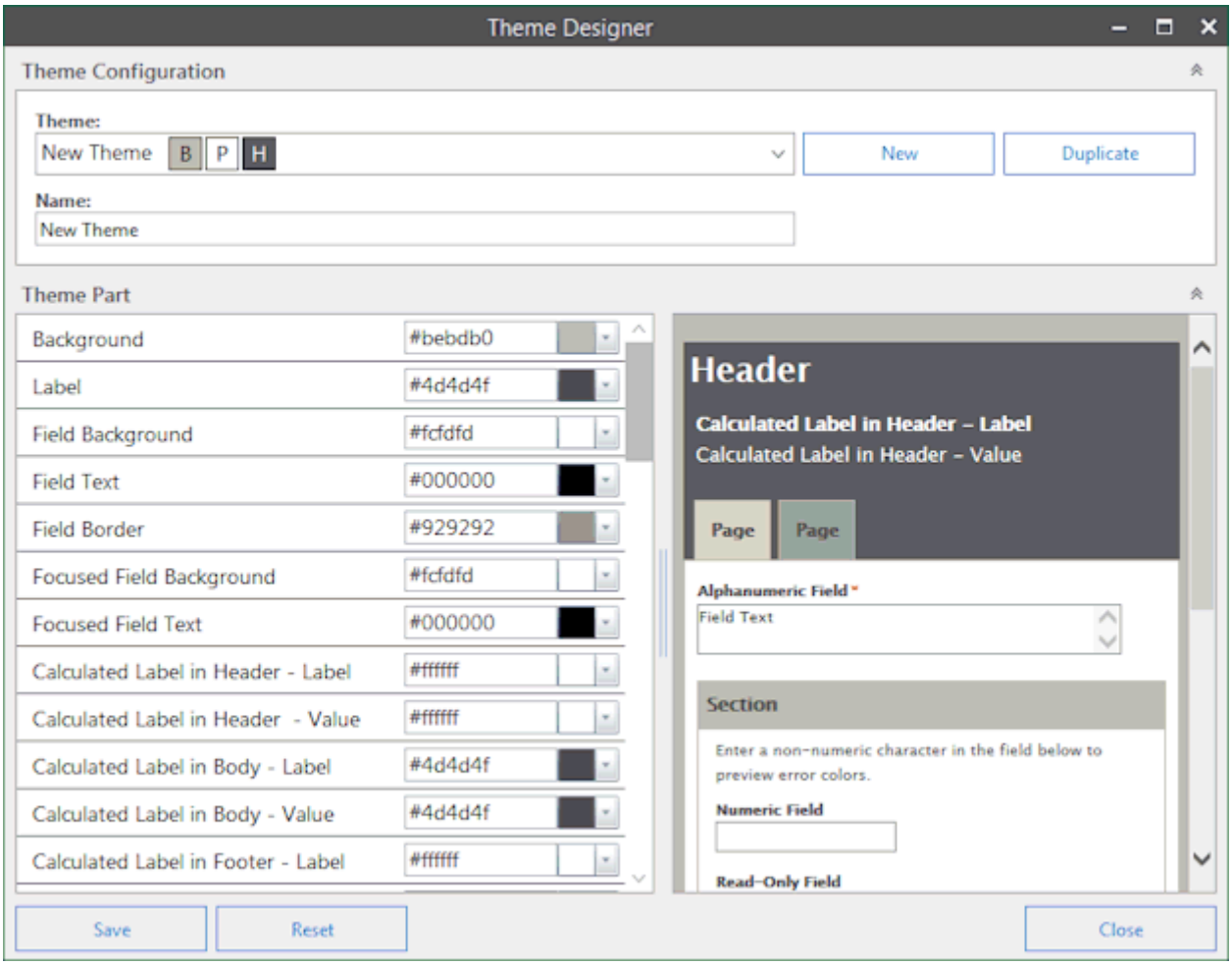
3. **New Theme** is displayed in the **Theme** drop-down list and a set of default colors is loaded into the designer window.



4. Enter a descriptive name for the theme in the **Name** field.
5. Select the appropriate color for each theme part in the **Theme Part** window. The preview pane shows a preview of the way the form will look using the configured theme part colors. For more information about theme part options, see Available Theme Parts on page 132.
6. When you have finished configuring the theme, click **Save**.
7. Click **Close** to exit the Theme Designer.

Tip: Click **Reset** to revert your changes back to the last saved version of the theme.

If you want to edit an existing theme, select it from the **Theme** drop-down list, make the appropriate changes, and save the theme.

Note: You cannot edit system themes. You can create a new theme based on a system theme by duplicating the system theme and then editing it appropriately.

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You can rename a theme by changing the value of the **Name** field and save the theme.

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Available Theme Parts

The following theme parts are available for configuration:

Theme Part	Description
Background	The blank space on a form that does not have a section, page, header, or footer on it. Attachment controls will also use this setting when they are highlighted by a custom action.
Label	The text used for field labels, attachment type labels, and attached file text.
Field Background	The background color of a non-selected, editable field.
Field Text	The text color in a non-selected, editable field.
Field Border	The color of the border line around all fields and the border of attachment buttons.
Focused Field Background	The background color of the field that currently has the focus and in which the cursor is active.
Focused Field Text	The text color in the field that currently has the focus and in which the cursor is active.
Calculated Label in Header - Label	The color of the calculated field label when a calculated field is placed in the header of the form and the calculated field is using the **Label Display Style**.
Calculated Label in Header - Value	The color of the calculated field value when a calculated field is placed in the header of the form and the calculated field is using the **Label Display Style**.
Calculated Label in Body - Label	The color of the calculated field label when a calculated field is placed in the body of the form and the calculated field is using the **Label Display Style**.
Calculated Label in Body - Value	The color of the calculated field value when a calculated field is placed in the body of the form and the calculated field is using the **Label Display Style**.
Calculated Label in Footer - Label	The color of the calculated field label when a calculated field is placed in the footer of the form and the calculated field is using the **Label Display Style**.
Calculated Label in Footer - Value	The color of the calculated field value when a calculated field is placed in the footer of the form and the calculated field is using the **Label Display Style**.
Lookup Field Label	The color of the label associated with fields configured to work with a lookup button control.

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Theme Part	Description
Lookup Field Background	The color of the background of a field configured to work with a lookup button control when the field is not selected.
Lookup Field Text	The color of the text in a field configured to work with a lookup button control when the field is not selected.
Lookup Field Border	The color of the border of a field configured to work with a lookup button control when the field is not selected.
Focused Lookup Field Background	The color of the background of a field configured to work with a lookup button control when the field is selected.
Focused Lookup Field Text	The color of the text in a field configured to work with a lookup button control when the field is selected.
Button Background	The color of buttons.
Button Label	The color of the text on buttons. This also controls the color of the arrow displayed on a drop-down button. It also controls the arrow color on the calendar arrow buttons.
Radio Button Label	The color of the text label for the radio button.
Header Background	The background color of headers.
Header Label	The color of text of the header and footer.
Section Header Background	The background color of sections headers, repeating sections headers, table headers, and attachment control headers.
Section Header Label	The color of text of the sections as well as the text within the calendar control.
Nested Top Table Header Background	The color of the header and buttons for the top level of a nested table.
Nested Top Table Header Label	The color of the header label and buttons for the top level of a nested table.
Nested Sub Table Header Background	The color of the header and buttons for the sub level of a nested table.
Nested Sub Table Header Label	The color of the header labels and buttons for the sub levels in nested table.
Footer Background	The background color of footers.
Page Background	The color of the background of a selected page.
Active Page Tab	The color of the background of a selected page tab.
Active Page Label	The color of the text of a selected page label.

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Theme Part	Description
Inactive Page Tab	The color of the background of inactive page tabs.
Inactive Page Label	The color of the label of inactive page tabs.
Error Background	The background color of a field that has a data validation error.
Required Field Indicator	The color of the asterisk that denotes a required form field.
Error Text	The color of text in a field that has a data validation error or in the header for a URL error.
Error List Background	The color of the pop-up box that displays for a field that has a data validation error or in the header for a URL error.
Validation Failed Text	The color of the text that describes the error in the pop-up box that displays for a field that has a data validation error.
Validation Passed Text	The color of the text that describes the parameters that were met in the pop-up box that displays for a field that has a data validation error.
Read Only Background	The background color for read-only fields.
Read Only Text	The color of text in read-only fields.
Hover Background	The color that appears when the cursor is placed on a clickable object or area.
Hover Label	The color of the text that appears when the cursor is placed on a clickable object or area.
Attachment Link	The color of the attachment preview link.
Attachment Remove Link	The color of the **Remove** button for the attachment.
Field Font	The font type and size for the text entered in fields.
Section Header Font	The font type and size for the section headers and page tab labels.
Title Font	The font type and size for the header of the form.
Label Font	The font type and size for field label text.
Paragraph Font	The font type and size for static text entered in Paragraph controls.
Button Font	The font type and size for text on Submit Button controls.
Radio Button Font	The font type and size of radio button labels.

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Note: When choosing fonts, select fonts that will be available on your users' systems. If a font you choose is not available on a user's system, the font will be substituted with an available font.

International Considerations

To ensure that characters display correctly, there are the following font recommendations:

- When using a Japanese locale, it is recommended that **MS Gothic (Japanese)** is used for fonts within the theme.
- When using a Chinese locale, it is recommended that **SimSun (Chinese)** is used for fonts within the theme.
- When using a Korean locale, it is recommended that **Gulim (Korean)** is used for fonts within the theme.

Global Settings

You can set global settings that affect the entire form template.

To access global settings, click **Global Settings** in the **Manage** ribbon group. The **Global Settings** dialog box is displayed.

Default Theme Selection

You can set the default theme that is used when creating new form templates. To set the default theme, select a theme from the **Default Theme Selection** drop-down list.

To create a new theme, click on the icon to the right of the **Default Theme Selection** drop-down list. The **Theme Designer** dialog box is displayed. For more information on designing a new theme, see Theme Designer on page 128.

Configuring Form Security

You can assign security to the form template at the page or section level.

To set form security:

1. Select the form container, page container, or control in the Designer.
2. To enable security select the **Is Secured** check box in the **Properties** pane.

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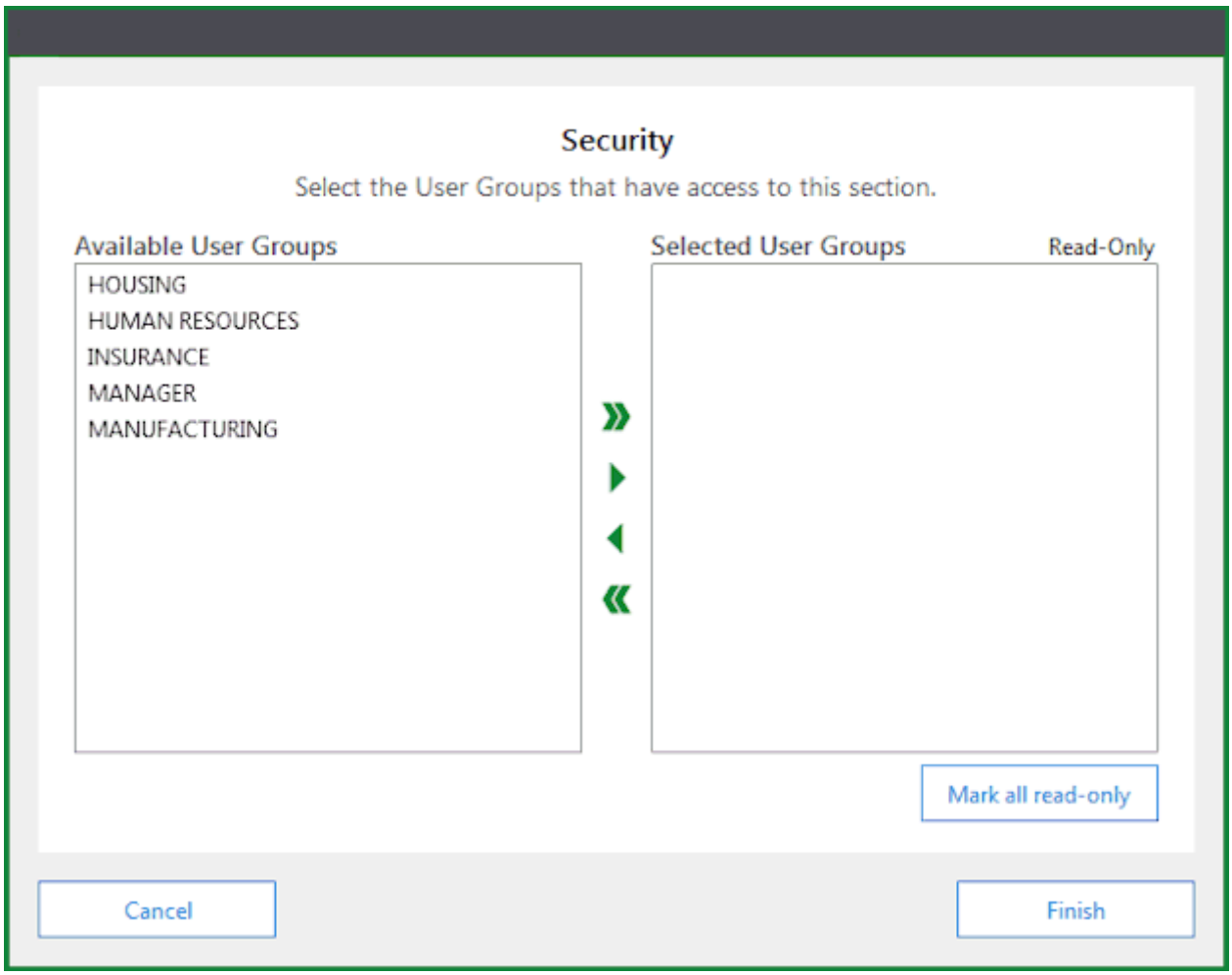
3. In the **Properties** pane, click the edit button next to **User Groups**. The security window is displayed.



4. Select the user group you want to assign rights from the **Available User Groups** box. You can select multiple user groups at a time if you want to assign the same rights to multiple groups.
5. Click **Add Selected Items**. Alternately, you can click **Add All Items** to add all user groups at once.

Note: You can remove user groups by selecting the user groups in the **Selected User Groups** box and clicking **Remove Selected Items**. You can remove all user groups by clicking **Remove All Items**.

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6. If you want to grant read-only access to the selected form item, select the **Read-Only** check box next to the user group.

Note: You can set all user groups to have read-only privileges by clicking **Mark all read-only**. All user groups listed in the Selected User Groups box will be set for read-only access.

7. When finished configuring security, click **Finish**.

Tip: You can double-click on user groups to move them to and from the **Available User Groups** and **Selected User Groups** boxes.

Note: Configured form template security for sections and pages within the form is respected in Workflow, regardless of permissions and overrides granted at the Workflow level.

Note: When security is enabled for a section or page and there are controls within it that have read-only properties enabled, the most restrictive setting for a user group is respected.

Tab Index Order

You can set the tab index order of the form template.

To set the tab index order of a page on the form template:

1. In the **Template** ribbon group, click **Tab Index Order** to display the **Tab Index Order** pane to the right of the **Pages** pane.
   The **Tab Index Order** window displays every control in the selected page and the tab index order that is assigned to each control.

Note: The default value for the controls listed in the **Tab Index Order** pane is **0 (zero)**. If you assign higher values to controls, the tab index order starts with the controls that still have a value of **0 (zero)**.

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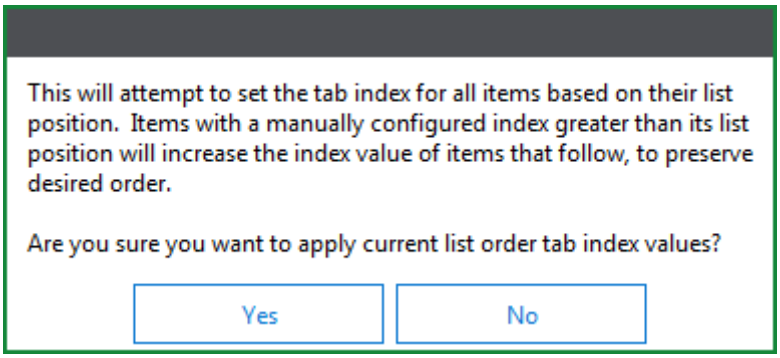
2. To change the tab index order of the controls on a page, enter the appropriate value in the text box under the ID of each control.

Tip: When you select a control, the control is highlighted in the **Tab Index Order** pane and the Designer. You can move up and down the list of controls either by using the up and down arrows on the keyboard or by clicking the appropriate arrow in the top-right corner of the **Tab Index Order** pane.

You can remove a control from the tab index order by assigning it a value of **-1**. A control that has this value is no longer able to be accessed when selecting controls using the **Tab** key.

Note: When using the **Tab** key to navigate through the tab index order, the controls with a tab index value of **0 (zero)** are navigated to first. After all the controls with a tab index value of **0 (zero)** are navigated to, the tab index order continues to the next lowest non-zero tab index value until it reaches the highest tab index value. Once the highest tab index value is reached, the controls with a tab index value of **0 (zero)** are navigated to again.

3. Click **Apply** to apply the changes made to the tab index order. A dialog box is displayed.



Click **Yes** to apply the new tab order index to the form template.

4. Click **Reset** to reset all of the controls on the selected page to a value of **0 (zero)**. A dialog box with a message saying **Are you sure you want to reset all tab index values to 0?** is displayed. Click **Yes** to reset the values of all the controls on the selected page.
5. To display the tab index order of a different page, select another page in the **Pages** window. The **Tab Index Order** pane updates to display the newly selected page's controls and their tab index order.
6. Click **Close** to close the **Tab Index Order** pane.

The following limitations apply when working with the tab index order:

- The maximum tab index value that can be assigned to a control is 32767.
- The **Tab Index** property is not available for sections, panels, paragraphs, or images.
- The **Tab Index** property is not available for controls that are placed inside of a repeating section, table, or nested table. These controls inherit the tab index value of their containers.

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Configuring Custom Actions

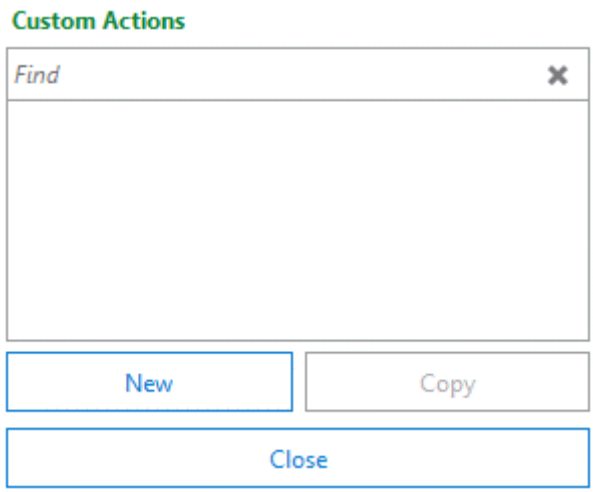
You can configure custom actions for forms. Custom actions allow you to configure a set of conditions and a set of actions that execute based on those conditions.

Note: Custom actions are only executed once a form is opened or before a Unity Form is saved as an image from the right-click **Send to** menu. When saving a Unity Form as an image, AutoFill Keyword Sets and Unity Scripts cannot be executed before the image is created.

Note: If a custom action is configured to execute in relation to a radio button selection, the custom action will execute immediately after the radio button option is selected.

To configure custom action:

1. With a form open, click **Custom Actions** in the **Designer** ribbon. The **Custom Actions** pane is displayed.



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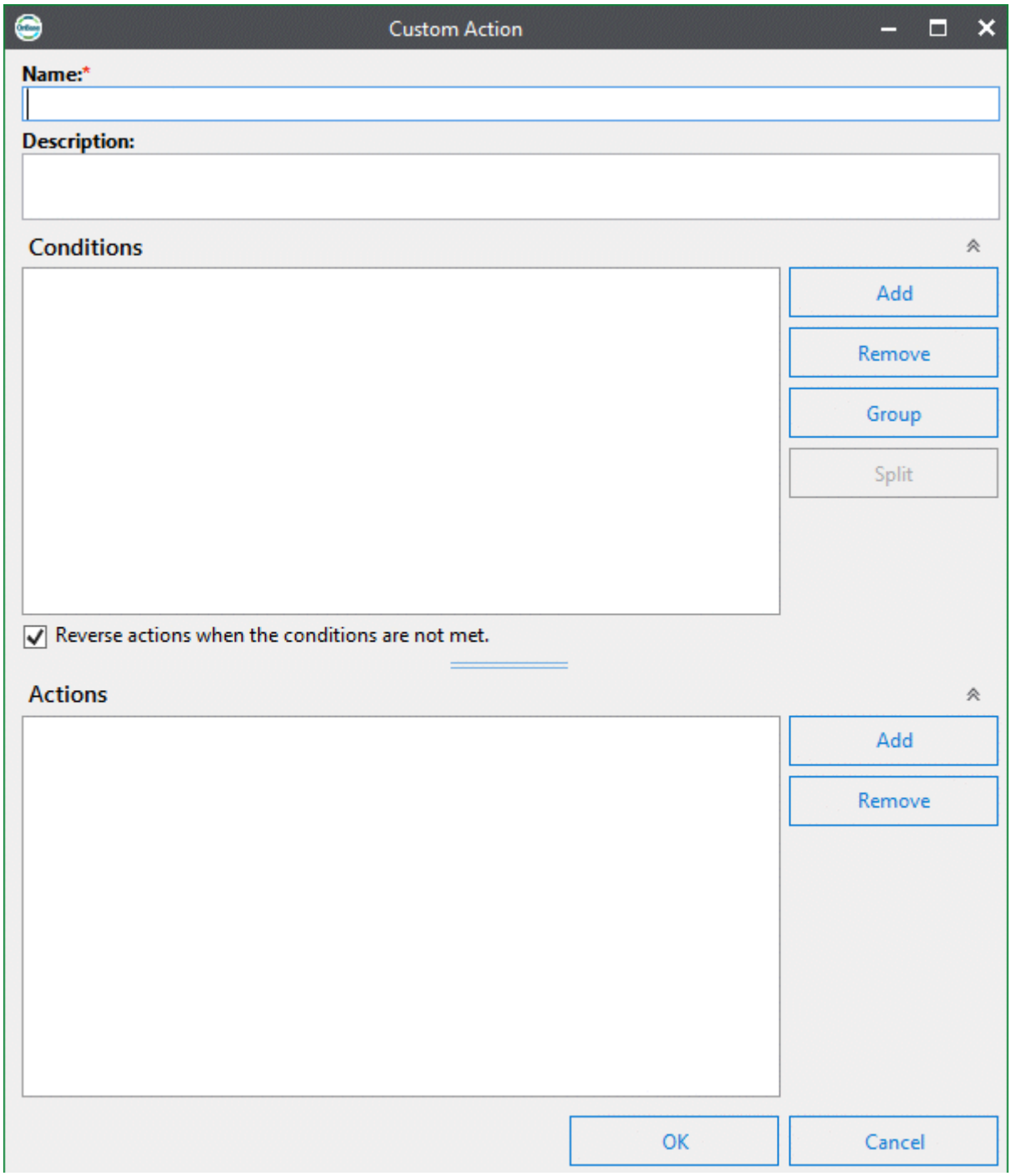
2. Click **New**. The **Custom Action** dialog box is displayed.



3. Enter a **Name** for the custom action.
4. Enter a **Description** for the custom action.

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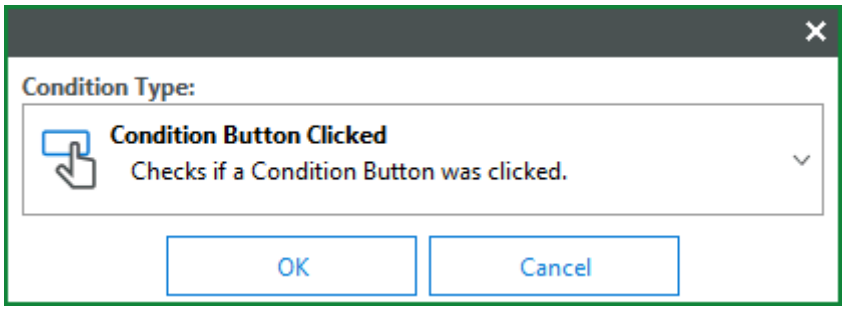
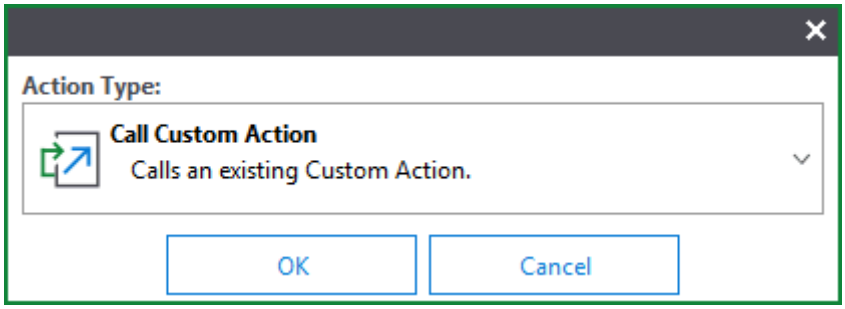
5. Click **Add** next to the **Conditions** box. The **Condition Type** drop-down list is displayed.



6. Select the appropriate condition and click **OK**.
7. Configure the condition appropriately.
8. Repeat Steps 5 to 7 for each condition you want to configure for this custom action. For more information on each condition type and grouping conditions, see Configuring Conditions on page 143.
9. If you want to group two or more conditions, select the conditions you want to group together and click **Group**. You can remove a grouping by selecting the group and clicking **Split**.
10. If you want to execute the inverse of the configure actions when the conditions are not met, select **Reverse actions when the conditions are not met**. For example, if you have an action that hides a field when the condition is met and you select this option, the field will be shown when the condition is not met.

Note: The **Set Field Value**, **Execute Unity Script**, and **Focus Field** actions do not support the **Reverse actions when the conditions are not met** option. When the Condition Button Clicked condition is configured, the Reverse actions when the conditions are not met option is disabled and cannot be used.

11. Click **Add** next to the **Actions** box. The **Action Type** drop-down list is displayed.



12. Select the appropriate action and click **OK**.
13. Configure the action appropriately.

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14. Repeat Steps 11 to 13 for each action you want to configure for this custom action. For more information on each action type, see Configuring Actions on page 150.

Note: You can remove an action or condition by selecting it and clicking the corresponding **Remove** button.

15. Click **OK** to finish creating custom actions.

Note: Visibility security configured on a form overrides any visibility setting configured in a custom action. For all other configuration types, the custom action will override what is configured on the form.

Note: Thoroughly test custom actions using test drive. Not all actions and conditions will be validated at the time of configuration.

Note: When using multiple custom actions, custom actions are evaluated in the order they are listed in the form designer.

Creating a Copy of a Custom Action

If you want to create a copy of an action to insert at a different point in the custom actions list or you want to use a copy of action as the basis for another action, you can accomplish this by copying the existing custom action.

To copy a custom action:

1. In the **Custom Actions** pane, select the custom action you want to copy.
2. Click **Copy**.
3. The **Custom Action** dialog box is displayed and all information from the original action is copied except the **Name** of the new custom action.
4. Specify the **Name** for the custom action. The name must be unique.
5. If necessary for your solution, edit the custom action to customize the copy you have created. For more information about options, see Configuring Custom Actions on page 139.
6. Click **OK**.

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Moving Conditions and Actions

You can move conditions and actions within the **Custom Action** dialog box by clicking and dragging. Select a condition or action and drag it to the appropriate location in the condition or action list to organize the configuration. When configuring conditions, you can click and drag conditions in and out of groups. You cannot drag a group within another group, however. When dragging groups, ensure that you have the group highlighted and not just a single item within the group.

Note: If you have entered characters in the **Find** field, drag and drop is disabled until the **Find** field is cleared.

Editing a Custom Action

A custom action can be edited by clicking the **Custom Actions** button in the **Designer** ribbon and then double-clicking on the custom action within the **Custom Actions** pane. You can search for a specific custom action by entering the name of the custom action in the **Find** field. You can clear the characters entered in the field by clicking the corresponding **x** button.

Configuring Conditions

The following conditions are available for custom actions.

Note: Conditions that evaluate data within a repeating section, table, or nested table may perform an action based on the result of the condition on any field within the same instance within that repeater/table. It may not perform an action on any element contained within other repeating sections or tables, in other instances within the same repeater/table, or any element outside of the repeating section/ table. In addition, nested tables allow you to create a condition on the top level of a table that will initiate an action within the second level of the table. When dealing with repeater fields and nested tables, conditions cannot be set on lower level because there are multiple instances of fields and the condition would not know which field should be determining whether or not an action should execute.

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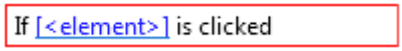
Condition Button Clicked

This condition allows you to define a button that, when clicked, will execute the configured actions.

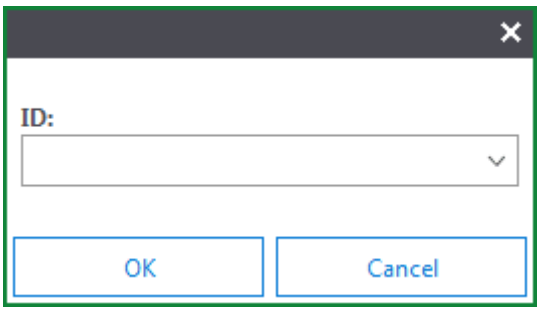
Note: Actions that do not change field values do not persist when the form is accessed again.

Note: When the Condition Button Clicked condition is configured, the **Reverse actions when the conditions are not met** option is disabled and cannot be used.

1. When this condition is selected, the following is displayed:



2. Click the **[<element>]** link. The following is displayed:

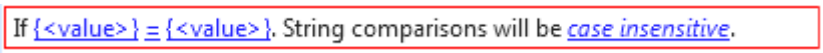


3. Select the appropriate configured condition button from the drop-down list.
4. Click **OK**.

Expression is True

This condition allows you to evaluate an expression to check if it is true. To configure this condition:

1. When this condition is selected, the following is displayed:



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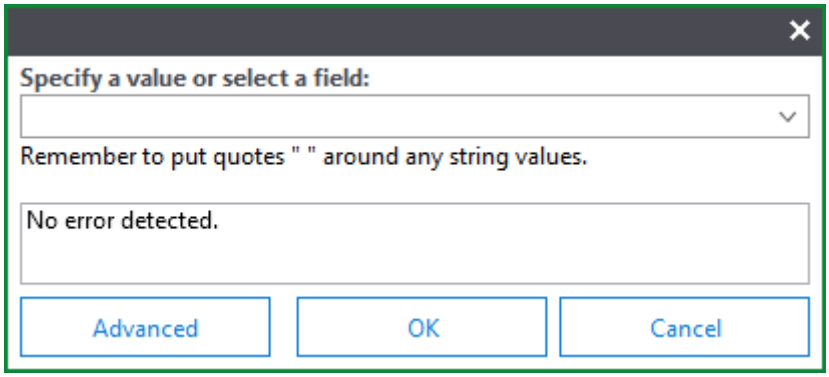
2. Click the first **{<value>}** link. The following is displayed.



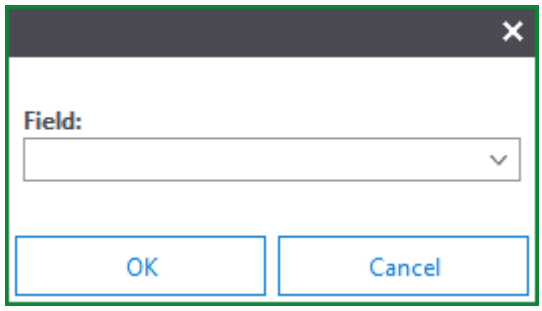
3. Either enter a value or select a field from the drop-down list. If you need to build a complex expression, you can click the **Advanced** button to access the expression screen. For more information on the expression options, see Expression Screen on page 95. You can return to the drop-down list by clicking **Basic**.
4. Click **OK**.
5. Repeat steps 2 to 4 for the second **{<value>}** link.
6. Click the operator to toggle to the appropriate operator for the expression.
7. If you want the condition result to be based on case sensitivity, toggle from **case insensitive** to **case sensitive**. If you want the condition to not be based on case sensitivity, toggle from **case sensitive** to **case insensitive**.

Field is Empty / Not Empty

This condition allows you to evaluate a field based on whether the field is empty or contains data. To configure this condition:

1. When this condition is selected, the following is displayed:

2. Click on the **[<field>]** link. The **Field** drop-down is displayed.



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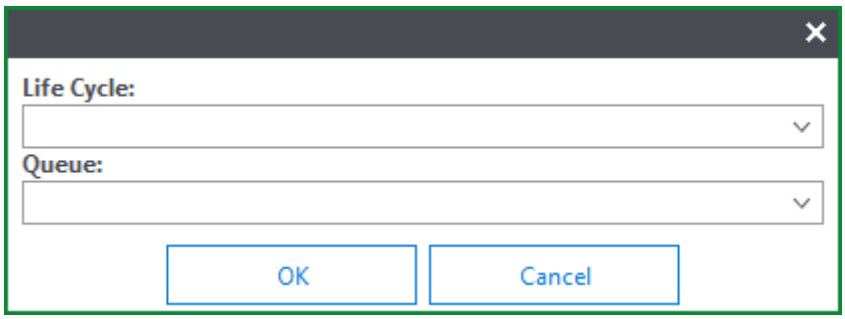
3. Select the field you want to check for data and click **OK**.
4. Click on the **Empty** link to toggle to **Not Empty**. If the link is **Empty**, the condition will evaluate true when there is no data in the field. If the link is **Not Empty**, the condition will evaluate true when there is data in the field.

Form is in / not in Queue

This condition allows you to evaluate whether or not the form is in the specified queue. To configure this condition:

1. When this condition is selected, the following is displayed:

2. Click on the **in** link to toggle to **not in**. If the link is **in**, the condition will evaluate true when the form is in the queue specified. If the link is **not in**, the condition will evaluate true when the form is not in the queue specified.
3. Click on the **<queue>** link.The following dialog box is displayed.



4. Select the **Life Cycle** and **Queue** that you want to evaluate against from the drop-down lists and click **OK**.

Form is Loading

This condition allows you to determine if the form is initializing. If the form is loading, the condition will evaluate true. The form is initialized when it is first created or opened. Once you have selected this as a condition, there are no additional steps for configuring this condition.

Form is New / Not New

Note: This condition is not available for Workflow forms.

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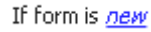
This condition allows you to evaluate whether a form is new or an existing form. To configure this condition:

1. When this condition is selected, the following is displayed:



2. Click on the **New** link to toggle to **Not New**. If the link is **New**, the condition will evaluate true when the form is new. If the link is **Not New**, the condition will evaluate true when the form already exists.

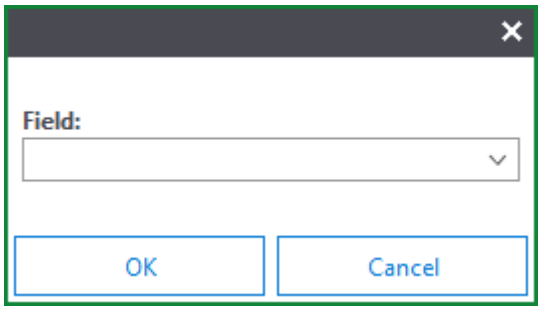
Signature is Signed / Not Signed

Note: This condition is not available for Workflow forms.

This condition allows you to check to see if a signature field on the form is signed. If the signature is cleared when creating a new form or a new revision of an existing form is created with the signature field cleared, the condition will evaluate as if the form was not signed. This condition does not check to see if the form was changed since the form was signed. To configure this condition:

1. When this condition is selected, the following is displayed.

2. Click on the **<signature>** link. The **Field** drop-down is displayed.



3. Select the signature field you want to evaluate.
4. Click **OK**.
5. Click on the **not signed** link to toggle to **signed**. If the link is **not signed**, the condition will evaluate true when the signature field is not signed. If the link is **signed**, the condition will evaluate true when the signature field is signed.

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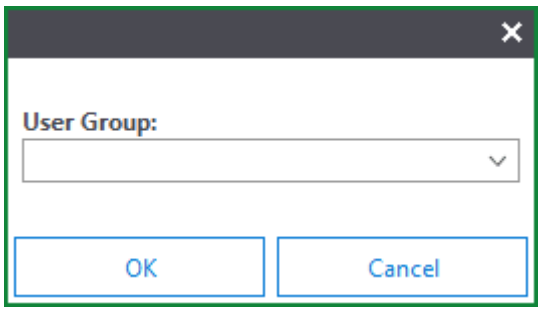
User is in / not in Group

This condition allows you to evaluate whether the currently logged in user is a member of a specified user group. To configure this condition:

1. When this condition is selected, the following is displayed:

2. Click on the **in** link to toggle to **not in**. If the link is **in**, the condition will evaluate true when the user is in the user group specified. If the link is **not in**, the condition will evaluate true when the user is not in the user group specified.
3. Click on the **<user group>** link. The **User Group** drop-down is displayed. All user groups configured in OnBase are available for selection.

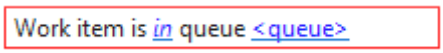


4. Select the user you want to evaluate against from the drop-down list and click **OK**.

Work item is in / not in Queue

This condition allows you to evaluate whether or not a Workflow form is in the specified queue. To configure this condition:

1. When this condition is selected, the following is displayed:



2. Click on the **in** link to toggle to **not in**. If the link is **in**, the condition will evaluate true when the form is in the queue specified. If the link is **not in**, the condition will evaluate true when the form is not in the queue specified.

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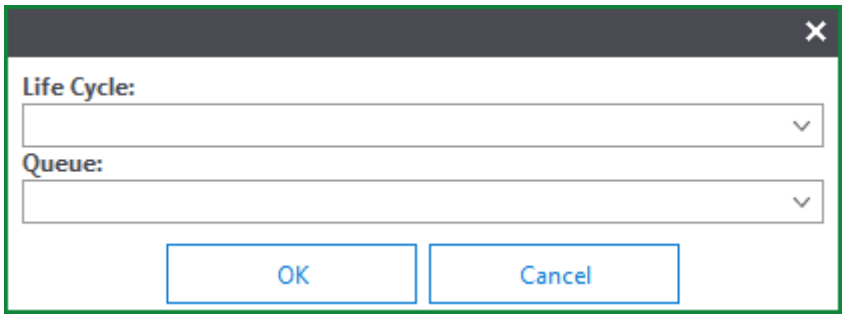
3. Click on the **<queue>** link.The following dialog box is displayed.

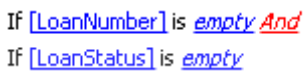


4. Select the **Life Cycle** and **Queue** that you want to evaluate against from the drop-down lists and click **OK**.

Combining and Grouping Conditions

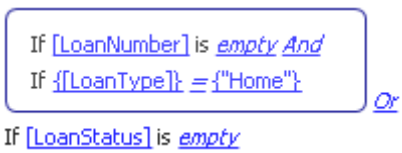
Conditions can be combined and grouped like any other expression. This is achieved by using the **And** or **Or** operators, condition groups, or a combination of the two.

When multiple conditions are added to a custom action, you use the **And** operator to require all conditions to be met or you can use the **Or** operator to accept either condition on either side of the operator. The operator is set by clicking on the operator link. Clicking on the link toggles between **And** and **Or**. In the following example, the operator link is red and is displaying **And**:



In some cases, you may have more complex condition requirements. When this occurs, you can group related conditions. You can do this by selecting the conditions that are related using and clicking **Group** once all the related conditions are selected. You can select conditions by pressing **Ctrl** on the keyboard and clicking on the conditions you want to group. You can also select conditions that are consecutively listed by pressing **Shift** on the keyboard and clicking on the first and last condition that you want grouped together.

Once conditions are grouped, they will be enclosed within a box and an operator link will be available between the grouped items and the next condition in the list, as well as between the conditions in the group. The following example has two conditions grouped, followed by the **Or** operator and another condition:



This condition set will execute the configured actions when either the grouped conditions are met or the other condition is met.

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Configuring Actions

An action is a component of a custom action that is executed when the conditions of the custom action are met. For more information on creating custom actions and using the **Custom Action** dialog box to configure them, see Tab Index Order on page 137.

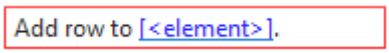
The following types of actions can be added to a custom action:

Add Repeater Row

The **Add Repeater Row** action automatically adds a row to a repeating section or table.

To configure an **Add Repeater Row** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Add Repeater Row** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:



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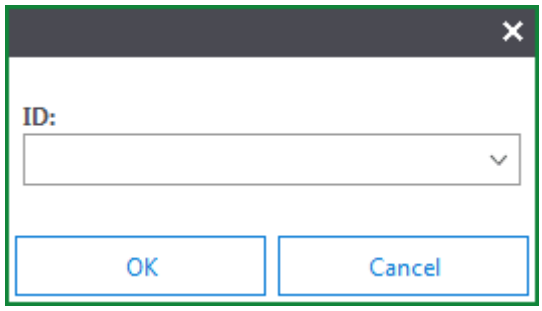
4. Click the **[<element>]** link. The **ID** drop-down list is displayed.



5. Select the ID of the element you want to add a row to from the **ID** drop-down list.
6. Click **OK**.

Call Custom Action

The **Call Custom Action** action calls another custom action that is already configured for the current form. This action allows you to reuse actions that are already configured.

Note: When this action is used to call another action, the conditions and the **Reverse actions when the conditions are not met.** setting configured for that called custom action are not applied. Only the actions configured in that called custom action are utilized. The actions configured for the called custom action will execute based on the conditions set in the **Call Custom Action** configuration.

To configure a **Call Custom Action** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Call Custom Action** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

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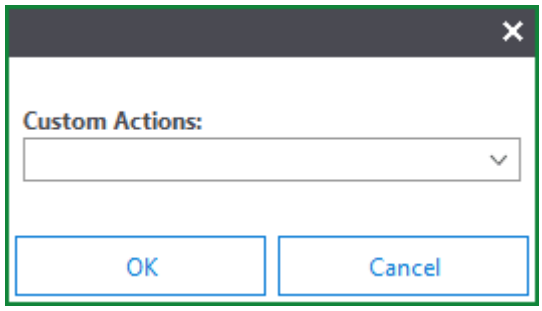
4. Click the **[<custom action>]** link. The **Custom Actions** drop-down list is displayed.



5. Select the custom action that you want to call from the **Custom Actions** drop-down list.
6. Click **OK**.

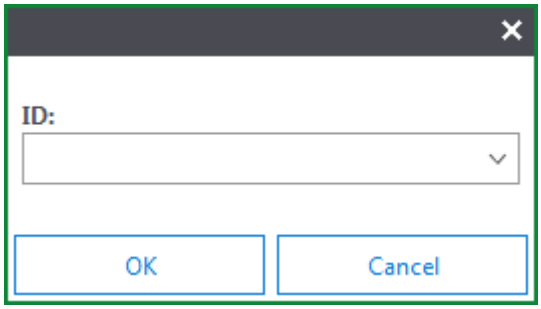
Change Element Editability

The **Change Element Editability** action alters whether a form element can be edited.

To configure a **Change Element Editability** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Change Element Editability** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

4. Click the **[<element>]** link. The **ID** drop-down list is displayed.



5. Select the ID of the element that you want to change the edit state of from the **ID** drop-down list.

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6. Click **OK**.
7. Click on the **read-only** link to toggle to **read-write**. If the link is **read-only**, the element will be read-only and cannot be edited when the condition is met. If the link is **read-write**, the element will be editable when the condition is met.

Note: This action will not override read-only settings configured at the form level or user group security configured at the form level.

Note: Controls within container elements will inherit the settings set by the custom action for its container.

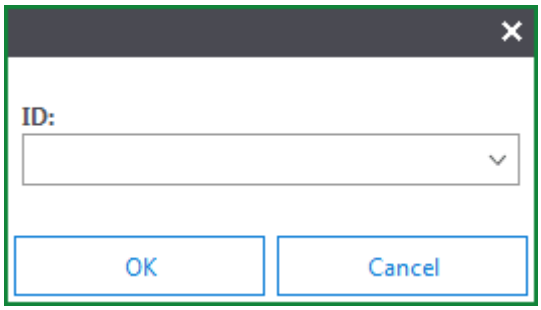
Change Element Visibility

The **Change Element Visibility** action shows or hides a form element when the configured conditions are met.

To configure a **Change Element Visibility** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Change Element Visibility** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

4. Click the **[<element>]** link. The **ID** drop-down list is displayed.



5. Select the ID of the element that you want to change the visibility of from the **ID** drop-down list.
6. Click **OK**.
7. Click the **Hidden** link to toggle to **Visible**. If the link is set to **Hidden**, the element will be hidden when the condition is met. If the link is set to **Visible**, the element will be shown when the condition is met.

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Change Label Name

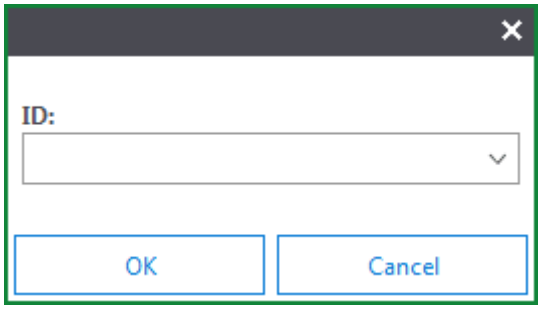
The **Change Label Name** action changes the label of a control when the configured conditions are met.

Note: This action cannot be used to change labels for panels, paragraphs, images, headers, or footers.

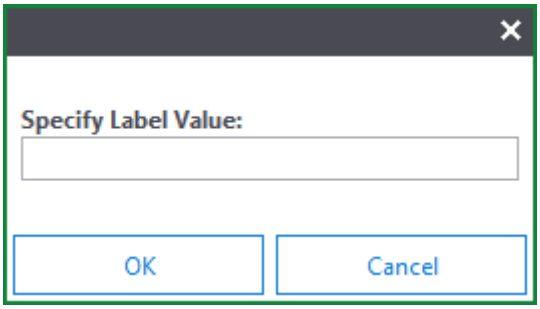
To configure a **Change Label Name** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Change Label Name** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

4. Click the **[<element>]** link. The **ID** drop-down list is displayed.



5. Select the ID of the element you want to change the label name for from the drop-down list and click **OK**.
6. Click the **{<value>}** link. The **Specify Label Value** drop-down list is displayed.



7. Enter the value you want to use for the label when the conditions are met in the **Specify Label Value** field.
8. Click **OK**.

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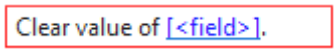
Clear Field Value

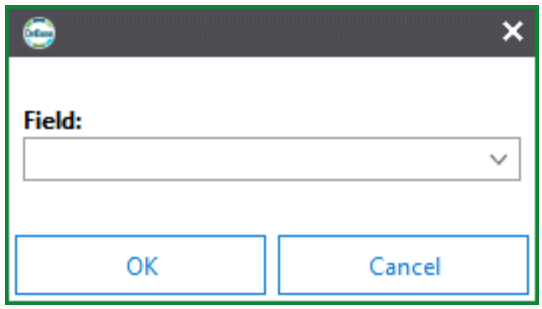
The **Clear Field Value** action clears the specified field.

To configure a **Clear Field Value** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Clear Field Value** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:



4. Click the **[<field>]** link. The **Field** drop-down list is displayed.



5. Select the field you want to clear the value for from the **Field** drop-down list.
6. Click **OK**.

Enable / Disable Repeater Buttons

The **Enable / Disable Repeater Buttons** action disables or enables either the **Add** or **Remove** button within a repeating section when the configured conditions are met.

To configure a **Enable / Disable Repeater Buttons** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Enable / Disable Repeater Buttons** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

4. Click the **Disable** link to toggle to **Enable**. If the link is toggled to **Disable**, the selected button will be disabled. If the link is toggled to **Enable**, the selected button will be enabled.

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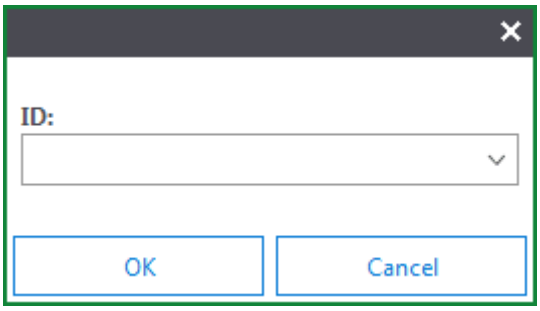
5. Click the **[<element>]** link. The **ID** drop-down list is displayed.



6. Select the ID of the repeating section that you want to disable or enable a button within from the **ID** drop-down list.
7. Click **OK**.
8. Click the **Add** link to toggle to **Remove**. Toggle the link to **Add** if you want to enable or disable the **Add** button within the selected repeating section. Toggle the link to **Remove** if you want to enable or disable the **Remove** button within the selected repeating section.

   If you toggle the link to **Remove** and have an element selected in the **[<element>]** link, the option to ignore or maintain the **Default Rows Cannot be Removed** setting is displayed. Toggle the link to **Ignore** to ignore the setting. Toggle the link to **Maintain** to respect the setting.

Note: This action is secondary to actions that execute on the entire repeating section, such as the **Change Element Editability** action, which would make the entire repeating section read-only.

Execute Unity Script

The **Execute Unity Script** action executes a specified script when the configured conditions are met.

Note: For a script to be available in this custom action, you must configure and publish a script using **IUnityFormCustomActionEventScript** in OnBase Studio. The Unity Automation API license is required to configure Unity scripts in a database. For more information on configuring scripts, see the **OnBase Studio** module reference guide.

Note: When using Test Drive, the Unity Script will not have access to unpublished form template changes.

To configure an **Execute Unity Script** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Execute Unity Script** from the **Action Type** drop-down list.

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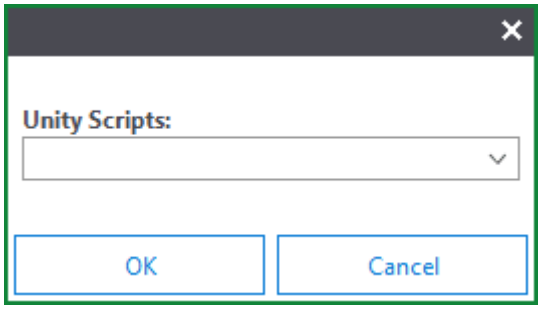
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

4. Click the **[<Unity Script>]** link.



5. Select the Unity Script that you want to use from the **Unity Scripts** drop-down list.
6. Click **OK**.

Note: The **Execute Unity Script** action is not supported in the Unity Briefcase while offline. This action requires connectivity.

Expand / Collapse Section

The **Expand / Collapse Section** action expands or collapses a section or an attachment control when the configured conditions are met.

To configure an **Expand / Collapse Section** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Expand / Collapse Section** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

4. Click the **Expand** link to toggle to **Collapse**. If the link is toggled to **Expand**, the section will be expanded. If the link is toggled to **Collapse**, the section will be collapsed.

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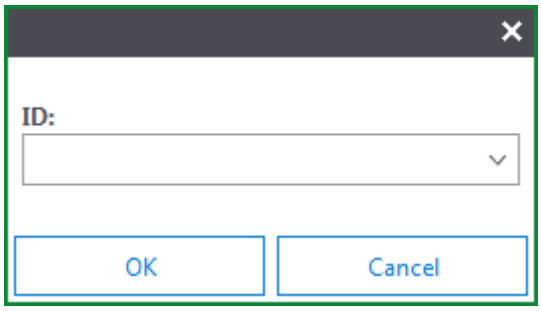
5. Click the **[<element>]** link. The **ID** drop-down list is displayed.



6. Select the ID of the section that you want to expand or collapse from the **ID** drop-down list.
7. Click **OK**.

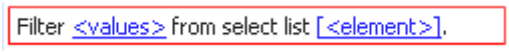
Note: When the **Is Collapsible?** property is not selected for the section configured for this action, the custom action will override the **Is Collapsible?** property configuration when the condition is true. Users still will not be able to expand or collapse the section via a mouse click in the form.

Filter Select List

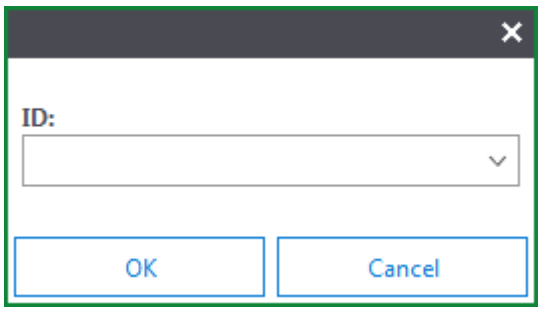
The **Filter Select List** action removes a specific set of the value from a select list when the configured conditions are met.

To configure a **Filer Select List** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Filter Select List** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:



4. Click the **[<element>]** link. The **ID** drop-down list is displayed.



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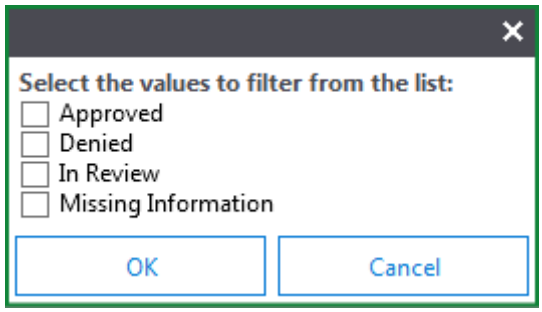
5. Select the ID of the select list from which you want to remove values from the **ID** drop-down list.
6. Click **OK**.
7. Click the **<values>** link. A list of values associated with the selected select list is displayed.



8. Select the options next to the values that are removed from the list of available values in the select list when the condition is met and click **OK**.

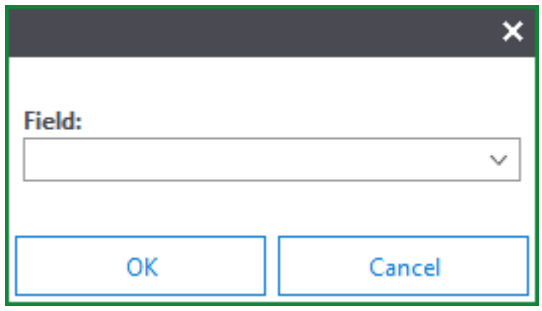
Focus Field

The **Focus Field** sets the focus on a specific field when the configured conditions are met.

To configure a **Focus Field** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Focus Field** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

4. Click on the **[<field>]** link. The **Field** drop-down list is displayed.



5. Select the field you want to set the focus on from the **Field** drop-down list.
6. Click **OK**.

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Highlight Element

The **Highlight Element** highlights an element when the configured conditions are met.

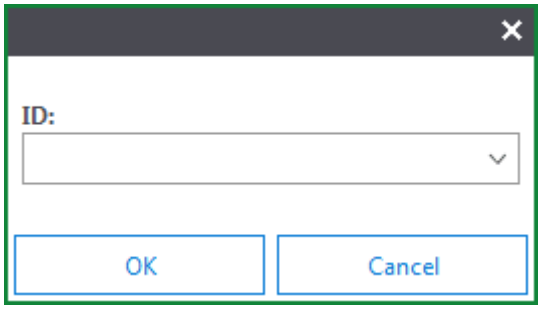
The following form elements can be highlighted using this action:

- pages
- sections
- repeating sections
- nested tables
- fields
- buttons
- signatures
- attachments

To configure a **Highlight Element** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Highlight Element** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

4. Click the **[<element>]** link. The **ID** drop-down list is displayed.



5. Select the ID of the element that you want to highlight from the **ID** drop-down list.
6. Click **OK**.

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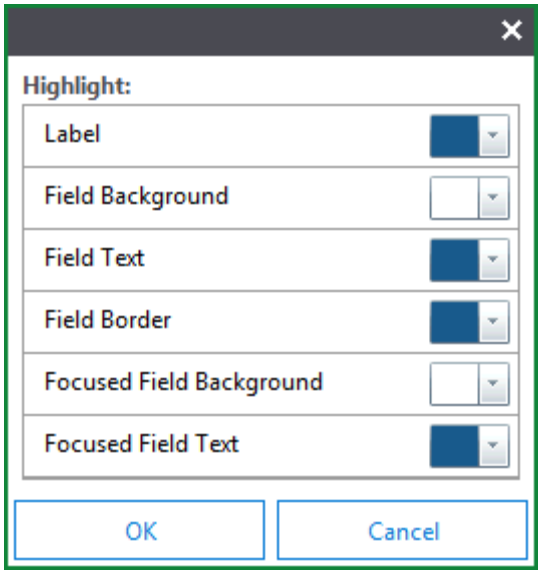
7. Click the **Highlight** link. Depending on the element you selected, you have different options to configure. The following is an example of the dialog box for a field.



8. Configure the proper highlight options and click **OK**.

Invalidate Field

The **Invalidate Field** action makes a specific field invalid and does not allow the form to be submitted when the configured conditions are met.

Note: If a field is set to become invalid and the current user does not have access to it or the field is read-only, the form will not be prevented from being submitted.

To configure an **Invalidate Field** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Invalidate Field** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:

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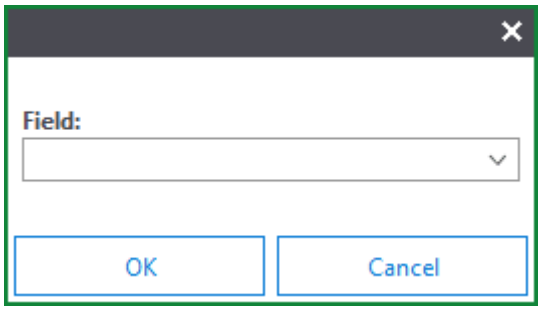
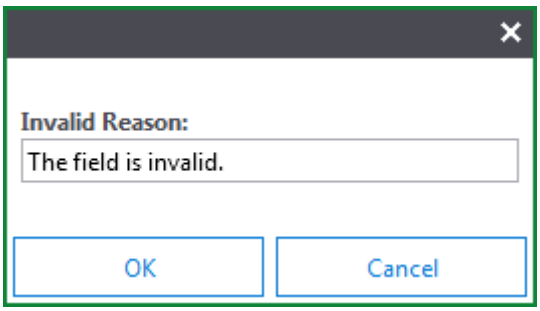
4. Click on the **[<field>]** link. The **Field** drop-down list is displayed.



5. Select the field you want to invalidate from the **Field** drop-down list.
6. Click **OK**.
7. If you want to customize the message for the reason the field is invalid, click the **'The field is invalid.'** link. The **Invalid Reason** field is displayed.



8. Enter the appropriate reason into the field and click **OK**.

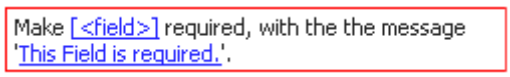
Make Field Required

The **Make Field Required** action makes a specific field required when the configured conditions are met.

Note: If the current user does not have rights to view the field that has been set as required by a custom action, the user will not be prevented from saving the form.

To configure a **Make Field Required** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select **Make Field Required** from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:



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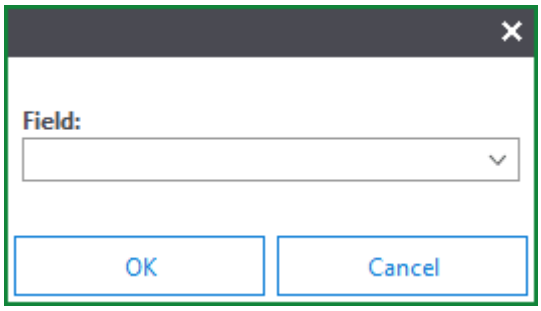
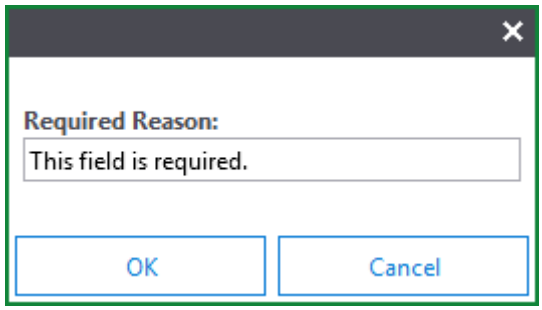
4. Click on the **[<field>]** link. The **Field** drop-down list is displayed.



5. If you want to customize the message for the reason the field is required, click **'The Field is required.'** link. The **Required Reason** field is displayed.



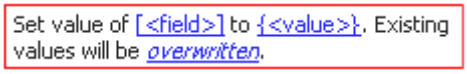
6. Enter the appropriate reason into the **Required Reason** field.
7. Click **OK**.

Set Field Value

The **Set Field Value** action sets the value of a field when the configured conditions are met.

To configure a **Set Field Value** action:

1. Click **Add** in the **Actions** section of the **Custom Action** dialog box.
2. Select from the **Action Type** drop-down list.
3. Click **OK**. The following text is displayed in the **Actions** field of the **Custom Action** dialog box:



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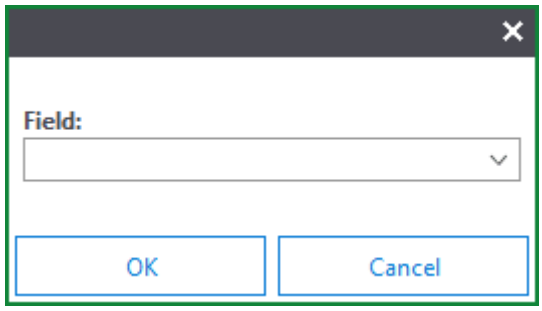
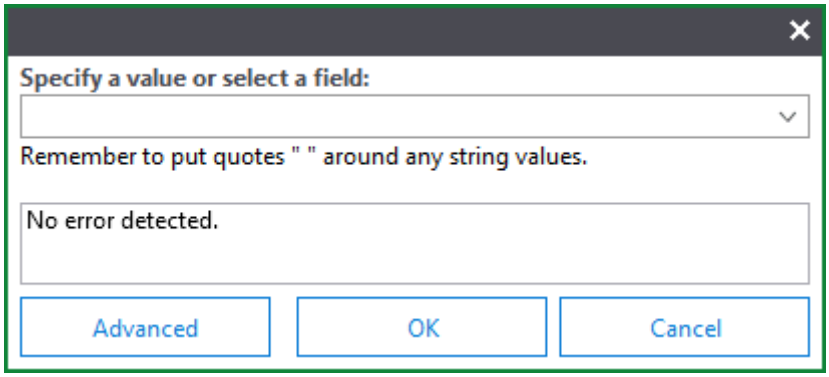
4. Click on the **[<field>]** link. The **Field** drop-down list is displayed.



5. Click the **{<value>}** link. The following dialog box is displayed.



6. Enter a value or select a field from the drop-down list. If you need to build a complex expression, you can click the **Advanced** button to display the **Expression Builder** dialog box. For more information on expression options, see Expression Screen on page 95. You can return to the previous dialog box by clicking **Basic**.
7. When a value is entered or a field is selected and no errors are displayed below the drop-down list, click **OK**.
8. Click the **overwritten** link to toggle to **kept**. If the link is toggled to **overwritten**, the current value of the field is overwritten by the action's value. If the link is toggled to **kept**, the current value of the field is retained.

Note: If the field already contains the value specified, no change is made to the field.

Note: Max field length values are respected when using this custom action. Characters that exceed the max length will be truncated.

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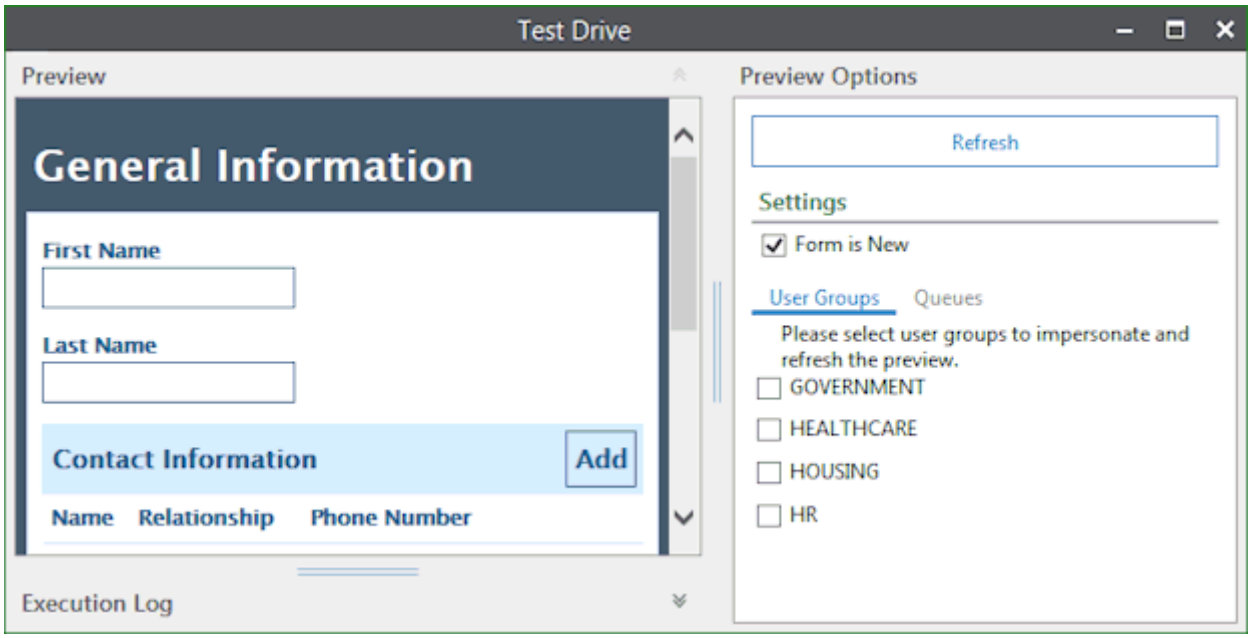
Test Driving Forms

The Designer allows you the ability to “test drive” forms before publishing them for public use. This allows you to use the form the same way a user would. You can test out the functionality of fields and tabs. In addition, you can test the security applied to pages, sections, and fields. You can run test drives as specific user groups to assure that the form is configured in a way that makes sense to the user and provides the appropriate data security.

The following is an example of a test drive session:



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You can test drive forms to view how they look and function on the Client side. To test drive a form:

1. With a form open in the Designer, on the **Designer** ribbon, click **Test Drive**. A viewer opens with the form displayed as it will appear in the Client.

   You can select the user group you would like to impersonate to preview the form in the right pane of the viewer within the **User Groups** tab. You can preview different user groups by selecting a different user group check box and clicking **Refresh**.

Note: When test driving a form as a specific user group, only the print privileges granted at the user group level in the Configuration module are respected. If there is an override at the Document Type level for printing, it will not be respected in test drive mode.

Note: The **Form is New** option is not available for Workflow Forms and the **Queues** tab is automatically enabled.

Note: When test driving a form that contains a CAPTCHA control, a placeholder image will be displayed for the control. In addition, the control will evaluate as empty / not completed in test drive.

   You can also select **Form Is New** to test drive the form as if it was a newly created form. This is most helpful when test driving forms with custom actions configured.

   When **Form Is New** is not selected, the **Queues** tab is enabled.

   If you have a custom action that uses the condition that evaluates whether a form is in a queue, you can select the **Queues** tab, expand the appropriate life cycle, and select the queue you want to test drive the form for. If the form belongs to a Document Type that is assigned to the life cycle and queue selected, the test drive will function as if the form is in the queue.

   Select the test drive options you would like to impersonate and click **Refresh**.
2. When you are finished test driving the form, exit the test drive window.

The **Execution Log** pane logs all of the activity taking place in test drive mode. This can be especially useful if you are test driving forms that have custom actions configured. You can view how the conditions are evaluated and the action(s) that are executed.

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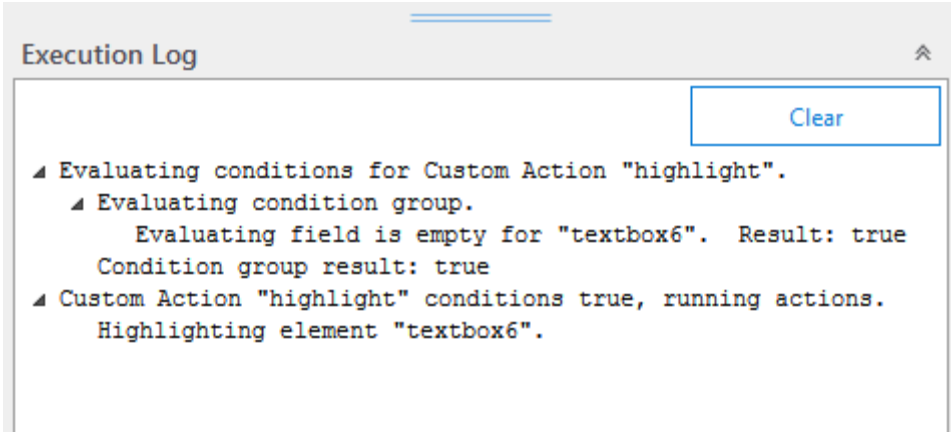
Click the down arrow next to **Execution Log** to view the pane. The following is an example of this pane.

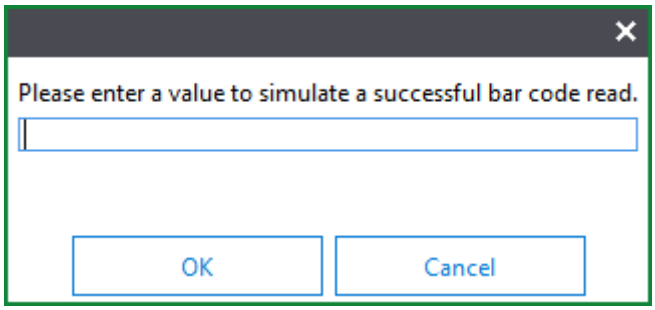


You can click **Clear** to clear the logged information.

Test Driving the Bar Code Reader Control

When you test drive a Bar Code Reader control, you cannot navigate to an image that contains the bar code. Test drive allows you to simulate capturing a value from a bar code in order to demonstrate which field is populated. To test drive the Bar Code Reader control:

1. In test drive mode, click the configured Bar Code Reader button. The following screen displays:



2. Enter a value that you want to use to simulate capturing a value from a bar code in the field.
3. Click **OK**. The value will populate in the configured field.

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Testing the CAPTCHA Control

If the Unity Form contains a CAPTCHA control, a **CAPTCHA is Completed** setting option is displayed in the **Preview Options** pane. In order to fully test forms with CAPTCHA controls, you must mark the control as complete because the CAPTCHA control is not fully functional in test drive mode and the form cannot be submitted if the CAPTCHA control is not complete. The CAPTCHA control will render as a placeholder image in test drive. If you change the **CAPTCHA is Completed** selection, you must click Refresh to test the form with that setting.

Publishing Templates

In order to make a form available in the Client for data entry, the form template must be published. Multiple form templates can be associated with a single Document Type. To publish a form template:

1. Once the form is configured appropriately, in the **Designer** ribbon, click **Publish**. A message stating **You are about to Publish the current form. Publishing a form saves the template into the repository and makes it available to users filling out forms. Newly created forms of this type will use the most recently published template. Are you sure that you would like to Publish the form?**
2. Enter a **Comment** about what changed in the template. Comments cannot be edited after publishing. There is a maximum of 250 characters allowed in this field.
3. Click **Publish** to continue with the publishing of the form. Click **Cancel** to abort publishing.
4. Upon clicking **Publish**, a status bar is displayed. When the status bar disappears, the form is published. In order to access a newly published form, the Client must be restarted.

Note: If you want to use a Unity Form on a web site, see Sharing Forms on page 170 for more information.

Note: If you have not published a form template, a message stating **You have not saved changes made to this form. Would you like to discard all changes?** is displayed when you navigate away from the form template in the Designer. Click **OK** to discard changes. Click **Cancel** to return to the form template and publish the form template.

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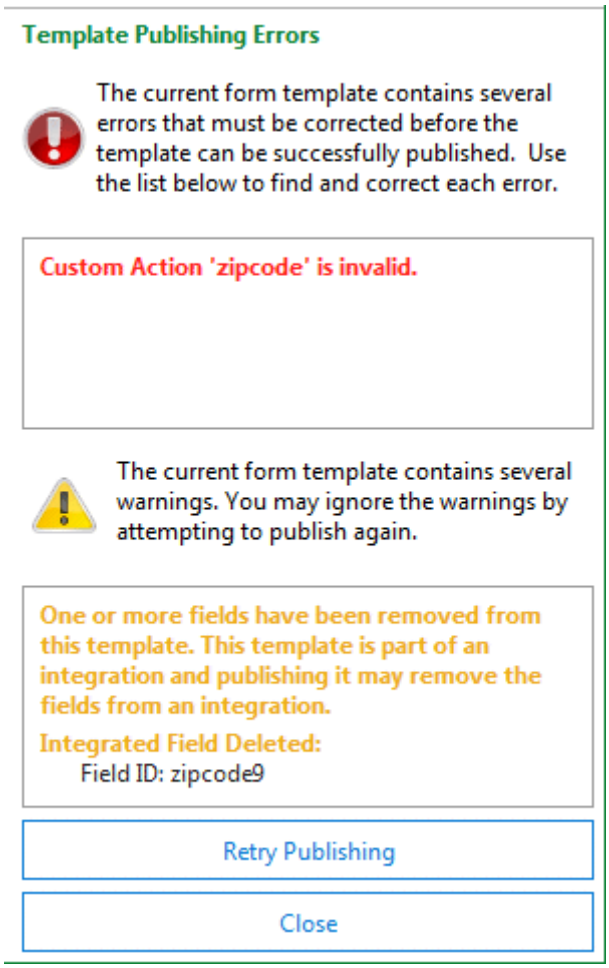
Template Publishing Errors

While designing your forms, you may perform an action, like removing a field from the form, that contradicts one or more configuration settings in the form. Upon clicking **Publish**, the **Template Publishing Errors** pane is displayed on the right side of the screen when these issues occur. The following is an example:



Errors are displayed in red text. Warnings are displayed in yellow text.

If you receive a warning, but no errors, you can still publish the form, although some of your configuration options may not function based on the issue described in the error pane. You can click **Retry Publishing** to publish the form. If you have errors in red, the form will not publish when this button is clicked.

Note: Upon clicking **Retry Publishing**, if you have a warning message about removing a field that is associated with an integration, the field will be removed from the integration if the form was opened after the integration was configured to contain the field. If the form was open before the integration was configured to include the deleted field and the form was republished, the field must be removed from the integration manually.

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Sharing Forms

You can use Unity Forms in external web sites to allow form creation and submission external to the OnBase system. Published form templates can be shared to an external site.

Note: Workflow forms are not supported in the Shared Forms feature.

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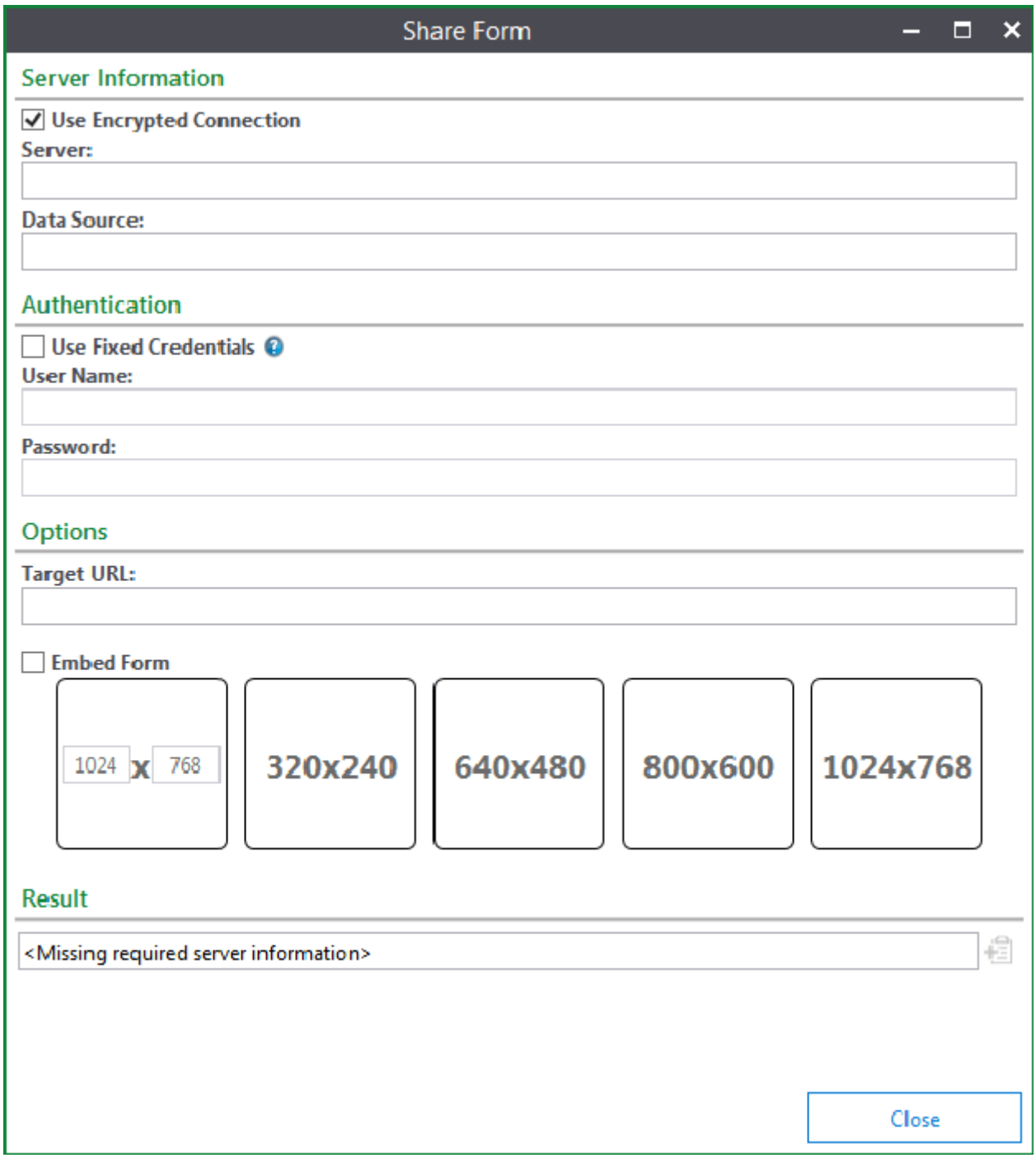
To share a form template:

1. Open a published form template.
2. Click **Share Form**. The **Share Form** dialog box is displayed.



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3. Select the appropriate options for your form. See Shared Form Options on page 172 for more information.
4. Click **Copy to Clipboard** next to the **Result** field.
5. Paste the generated text in the appropriate place in relation to the external web site. You can use a generated URL to open the form directly or you can use the code generated to embed the form into a web site page, depending on the options you selected.

Note: In order for shared forms to load properly, first-party cookies must be accepted on the client workstation. This is configured in the workstation's Internet Options. In addition, when using Firefox, Chrome, or Safari, shared forms cannot be accessed when private browsing mode is being used.

Note: A Web Server must be installed to use shared forms. This does not require a Web Server license, however.

Note: The **Share Form** button is disabled when working in a draft of a form.

Shared Form Options

The following options are available when configuring a shared form.

Server Information

Option	Description
Use Encrypted Connection	Select this option if you want the URL that is created to use an HTTPS binding. Your server must be configured for HTTPS binding. **Note:** This option will be selected by default. This option must be selected if you have **AllowInsecureConnection** set to **false** in the Application Server's web.config file.
Server	Enter the host name and virtual directory associated with the OnBase Web Server that is associated with the form template. Example: machinename/virtualdirectory **Note:** The server should match the Web Server specified in the OnBase Web Server's web.config file.

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Option	Description
Datasource	The datasource entered in this field will be used by the Web Server to access the OnBase system during form creation. The datasource entered here will override the datasource configured as the Web Server's default datasource. **Note:** This field is not mandatory. If a value is not specified, the datasource configured in the Web Server's web.config file is used.

Authentication

If you want to specify a user account that will always be used to automatically log in to the OnBase system in order to submit forms from an external site, select **Use fixed credentials**. Selecting this option enables the **User name** and **Password** fields. Enter the **User name** and **Password** for the account you want to be used for external form submission.

Caution: Service accounts cannot be used for authenticating a shared form.

Caution: When using the Hyland IdP in conjunction with shared forms, the Used fixed credentials option is not supported.

Target URL

In the **Target URL** field, enter the full URL of the site to which the user will be redirected after submitting the form.

Integration

If you want to use one of the configured integrations associated with the form you are sharing, select **Use Integration**. From the **Integration** drop-down list, select the integration you want to use. Only the integrations configured for the current form are displayed for selection.

Note: Fields pre-populated using an integration cannot be modified. If a pre-populated field from an integration is modified, the form cannot be submitted. As a best practice, is it recommended to configure these fields as read-only.

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Embed Form

If you want to embed the form into a Web site page, select **Embed Form**. You can then select the size of the embedded form. You can specify a custom size or select one of the following pre-defined sizes: 320x240, 640x480, 800x600, or 1024x768.

Note: By default, if you are embedding content from the OnBase Web Server into a web page, the page and the embedded content must be on the same domain. If your solution requires embedding Web Server content into a different domain, you can configure the Web Server to allow this. For more information, see the section on X-Frame-Options in the **Web Server** module reference guide.

Web Browsers

When configured correctly, shared forms allow users to submit forms.

Fully supported browsers for forms include the following major browsers. For the best experience with these forms, one of the following browsers is recommended:

- Microsoft Internet Explorer 11
- Microsoft Edge on Chromium 89 and greater
- Google Chrome 89 and greater
- Mozilla Firefox 87 and greater
- Apple Safari 14.0 and greater

While other browsers and older versions of the above browsers can be used for submitting Shared Forms, full testing is recommended as some features may not be available and functionality may be degraded.

License Consumption for Shared Forms

A form that is shared via a URL using the **Share Form** option will consume a license when the form is submitted into the OnBase repository.

For current licensing requirements, the user must have a Standard or Premier license assigned to be able to access and submit a Shared Form.

For legacy licensing, using a shared form requires that the system be licensed for either Unity Forms or Image Forms.

Concurrent Client license consumption will be held after the form is submitted until the normal timeout occurs.

For legacy licensing, when licensed for the Archival API server license, the concurrent license is released immediately without having to wait for the session timeout required with a standard concurrent license.

For legacy licensing, Named User Client licenses will be consumed and released immediately after form submittal.

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Setting Form Visibility

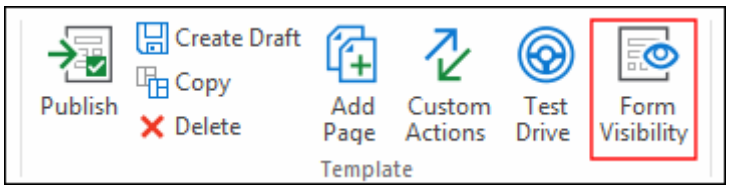
Once a form template has been published, you can set form visibility to further constrain which User Groups have rights to create a specific form. In order for a User Group to have rights to a form for creation in the OnBase Client, the User Group must have rights to the Document Type to which the form template belongs and rights to the form template itself. By default, all published forms are available to all User Groups that have rights to the Document Type.

For information on configuring rights to Document Types for User Groups, see the **System Administration** module reference guide.

Note: You cannot change form visibility for Workflow forms. Workflow forms are always available to all User Groups that have rights to the Document Type.

To set form visibility:

1. Open the desired published form template.
2. In the **Template** ribbon group, click **Form Visibility**.



3. Deselect **Display for creation for all user groups**.
4. Select the User Groups you would like to grant access to the form.

Tip: To easily find a User Group in a long list of User Groups, type-ahead searching is available. First, click on any User Group to highlight it and then start typing the name of the User Group you want to find. The list automatically narrows down in relation to the letters you type. The more letters of the User Group's name you type, the more the list narrows down to find the desired User Group. Type-ahead searching is available in both the **Available Groups** and **Selected Groups** columns.

5. Click **Add**.
6. Click **Save**.

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Disabling Specific E-Forms

In some cases you may need to disable an E-Form so users cannot create new E-Forms of a specific type. One of these situations is when you convert an existing E-Form to a Unity Form. Once a Unity Form is configured to replace an E-Form, you would want to disable the E-Form equivalent. To disable an E-Form:

1. In the Configuration module, select **Document | Document Types**. The **Document Types** dialog box displays.
2. Select the Document Type that is associated with the E-Form you want to disable.
3. Click **E-Form**.
4. Select the **Don't allow form creation** option. Selecting this option disables all revisions for an E-Form; you do not have to apply this option for each revision.
5. Click **Apply**.
6. Click **Close**.

Unity Forms and Revisions

When using document revisions with Unity Forms, keyword values can be changed in various ways throughout the software. When keyword values are changed other than by viewing and editing the form, these changes may not be reflected in revisions of the forms.

Specifically, when forms are created or modified from the Unity Briefcase, or created or revised through the API, the keyword values specified as part of those revisions will not be available after subsequent revisions have been created.

Additionally, the dynamic nature of forms may also affect what is shown on a form at the time a revision is created compared to what may be shown when a form revision is later retrieved. For example, if a form is using an external data source to populate a field and the external data has changed between when a revision is created and when it is viewed, the revision will display this updated external data instead of presenting the value shown when the revision was created.

Configuring Unity Form Integrations

You can pre-populate Unity Form fields with information from third-party systems. In order to accomplish this, you must configure an integration for the form's template.

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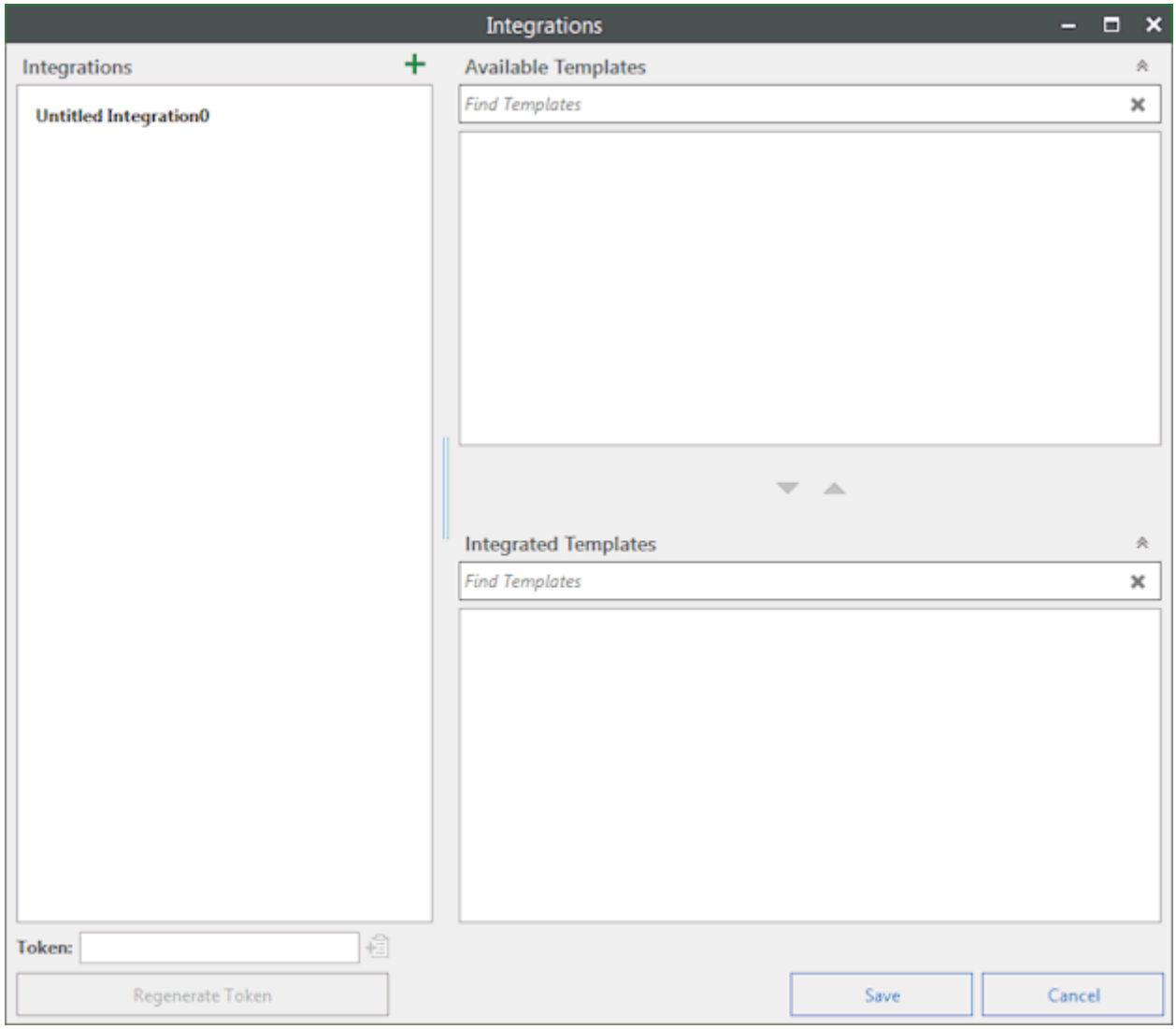
To configure an integration:

1. In the Forms Designer, click **Integrations** within the **Designer** ribbon. The **Integrations** dialog box is displayed.



2. Click the create button above the **Integrations** section.
3. To change the name of the integration, click the **Edit** button next to the integration and edit the appropriate name.

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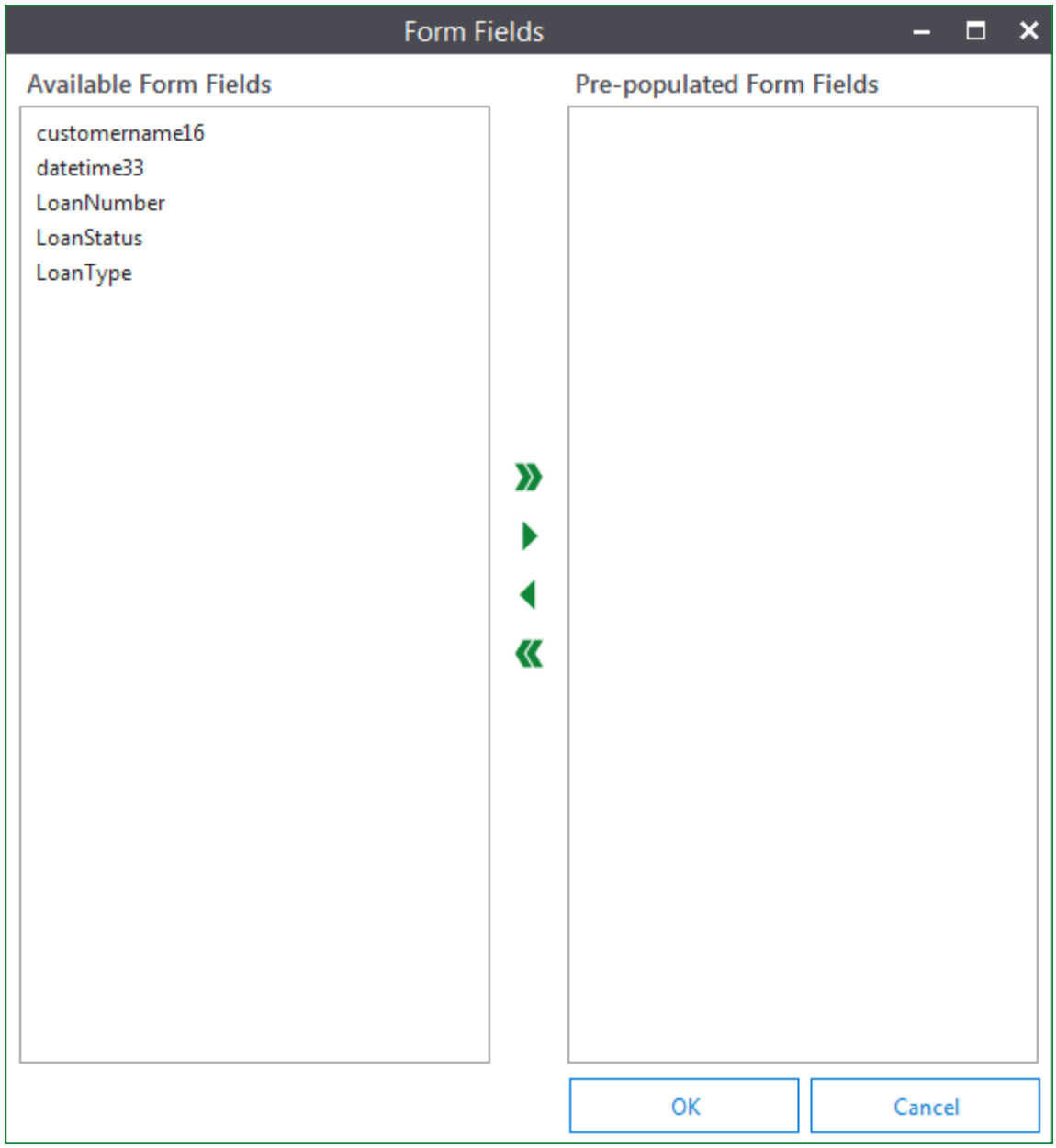
4. Select the template(s) you want to integrate with from the **Available Templates** box and click the **Add Selected Items** arrow to move the template(s) to the **Integrated Templates** box. You can use the **Find Template** fields to find the template(s) you want to use or templates you have already assigned to the integration.

Note: Only published versions of templates are available from this box.

Note: Workflow forms are not available for selection in the **Integrations** dialog box

5. Next to an integrated template, click **Configure Fields**. The **Form Fields** dialog box is displayed.



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6. Select the form field(s) from the **Available Form Fields** box and click the **Add Selected Items** arrow to move the field(s) to the **Pre-populated Form Fields** box. You can click the **Add All Items** arrow to move all fields to the **Pre-populated Form Fields** box.

Note: Only fields that are text boxes, check boxes, select lists, or multiline text boxes can be configured for an integration.

Note: Only fields that are on the latest published version will be available.

7. When all the appropriate fields are configured, click **OK**.
8. Configure the appropriate form fields for each template selected as an integration template.
9. When all templates are configured correctly, click **Save**.

Note: When you make a change to an integration while a form is open, the changes are saved upon clicking **Save** and is independent from publishing the form. If you change an integration associated with an open form, relaunch the form without publishing it to ensure changes to the integration configuration are respected.

You can delete an integration by clicking the **Edit** button to the right of the integration name in the **Integrations** box within the **Integrations** dialog box, then click the **Delete** button, and then click **Save**.

Editing Integrations

When you make a change to an existing integration, you must regenerate the token in order to appropriately update URLs that are used for the integration. To regenerate a token:

1. In the **Integrations** dialog box, select the integration from the **Integrations** box that you need to regenerate a token for.
2. Click **Regenerate Token**. A warning stating **If the token is regenerated, any URL that uses this integration will no longer work and will need to be manually updated to use the new token. Are you sure you would like to regenerate this token?** is displayed.
3. To continue with the token regenerations, click **Regenerate**. The integration in the **Integrations** box will display **The integration has a modified token.** to alert you that URLs must be updated.

   If you want to abort the regeneration process, click **Cancel**.
4. Click **Save**.

Note: The token and the changes are only saved after clicking **Save**. Regenerated tokens cannot be used until saved.

Once you regenerate the token, you must update the URLs associated with the integration. URLs using previous tokens will be invalid.

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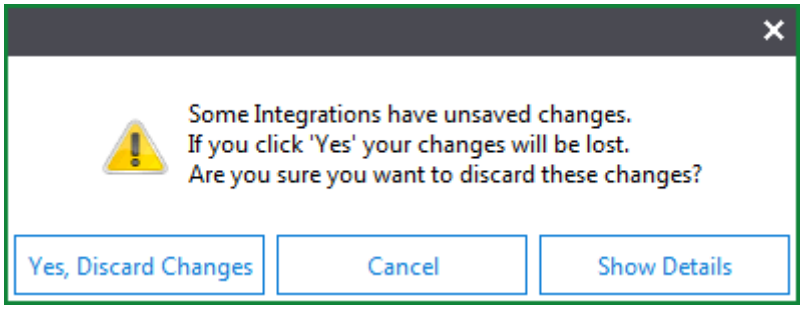
If you make a change to an integration and do not save the change before leaving the **Integrations** dialog box, the following is displayed:



If you click **Yes, Discard Changes**, the changes and generated token(s) will not be saved.

If you click **Cancel**, you will be returned to the Integrations dialog box.

If you click **Show Details**, details about what integration(s) changed and what specifically change in the integration(s).

Copying Tokens

Once a integration has a token and has been saved, you can copy it to use it in URL paths. To copy the token:

1. In the **Integrations** dialog box, select the integration from the **Integrations** box for which you want to copy the token.
2. Click **Copy Token**. The token is copied and can be pasted.

Designing Forms for Multiple Languages

When designing form templates in the Designer, the language used during configuration is the language that will be displayed in the Client during form creation. For example, if you configure a form in French in the Designer, when you open the form on any machine, regardless of locale settings, the form will be displayed in French.

Note: The database collation must support the language set on the workstation designing the Unity Forms.

In addition, you can use Interface Translation features available for Unity Forms to translate a form into multiple languages. In order to translate a form, you must do the following:

1. Identify and manage the forms that will be translated. See Managing Unity Form Translation on page 182 for more information
2. Export the forms that will be translated.
3. Have the export file translated into the appropriate language(s).

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4. Import the translated file into the system.
5. Translate the name of the form from within the Configuration module's Interface Translation feature. See the System Administration documentation for information about this feature.

Note: When a new revision is made for a translated form, the new revision will have the previous translations associated with the previously existing controls. New additions to the form will not be translated until the translation export and import process is run for the new revision.

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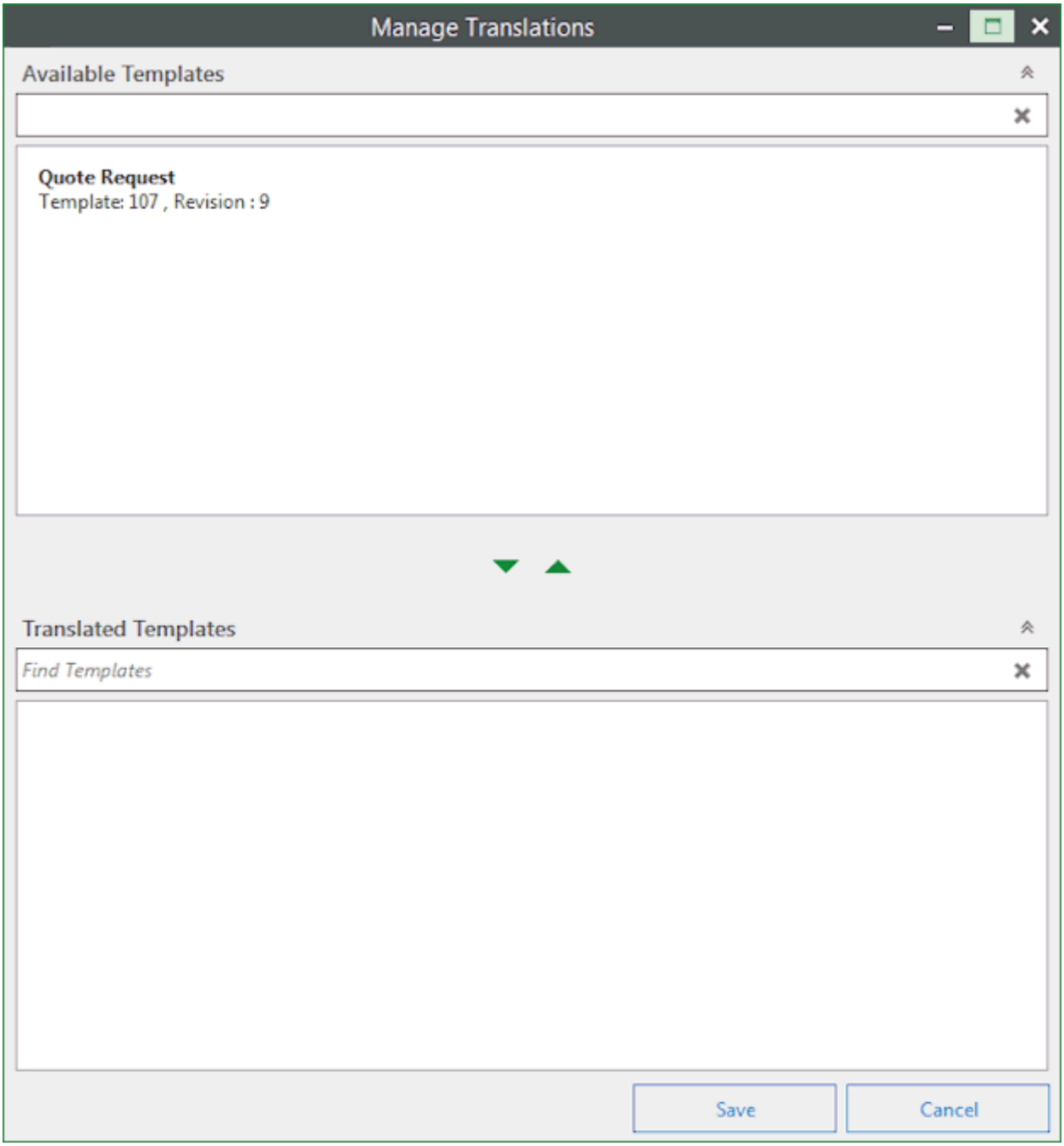
Managing Unity Form Translation

In order to translate Unity Forms, you must identify which forms are going to be translated. To manage Unity Form translation:

1. In the Unity Forms Designer, click **Manage** in the **Designer** ribbon.



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2. Select the form you want to translate in the **Available Templates** box and click the down arrow to move the template to the **Translated Templates** box. The forms in the **Translated Templates** box will be translated in the forms within the client when a translation for the language of the user's locale exists.

Note: Only published templates are available for selection.

Note: When using Firefox or Chrome, the language is determined by the language configured for the browser when using shared forms.

Tip: You can use the **Find Templates** box to search for a specific form.

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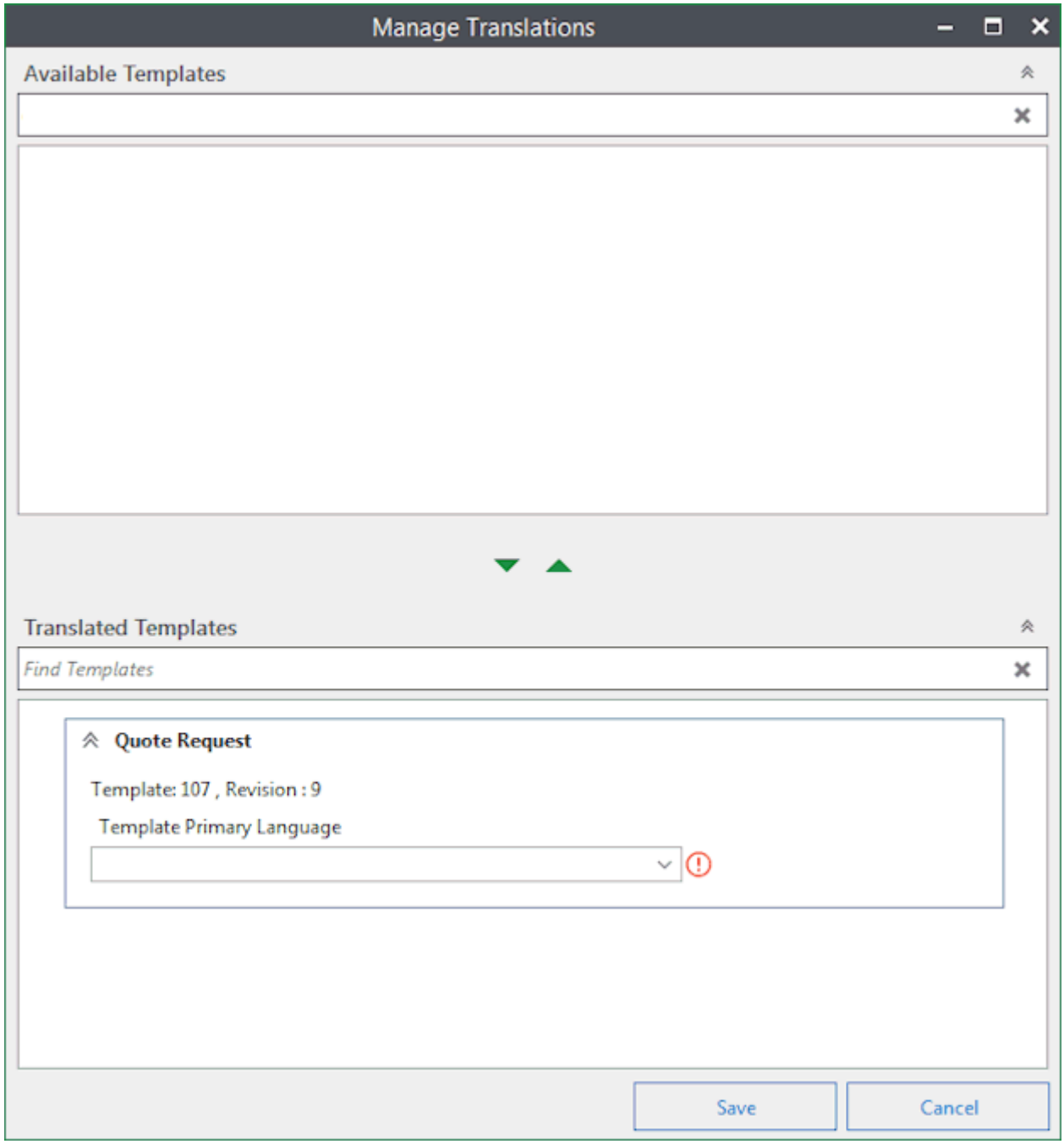

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3. Next, select the language in which the form was originally designed from the **Template Primary Language** drop-down list.

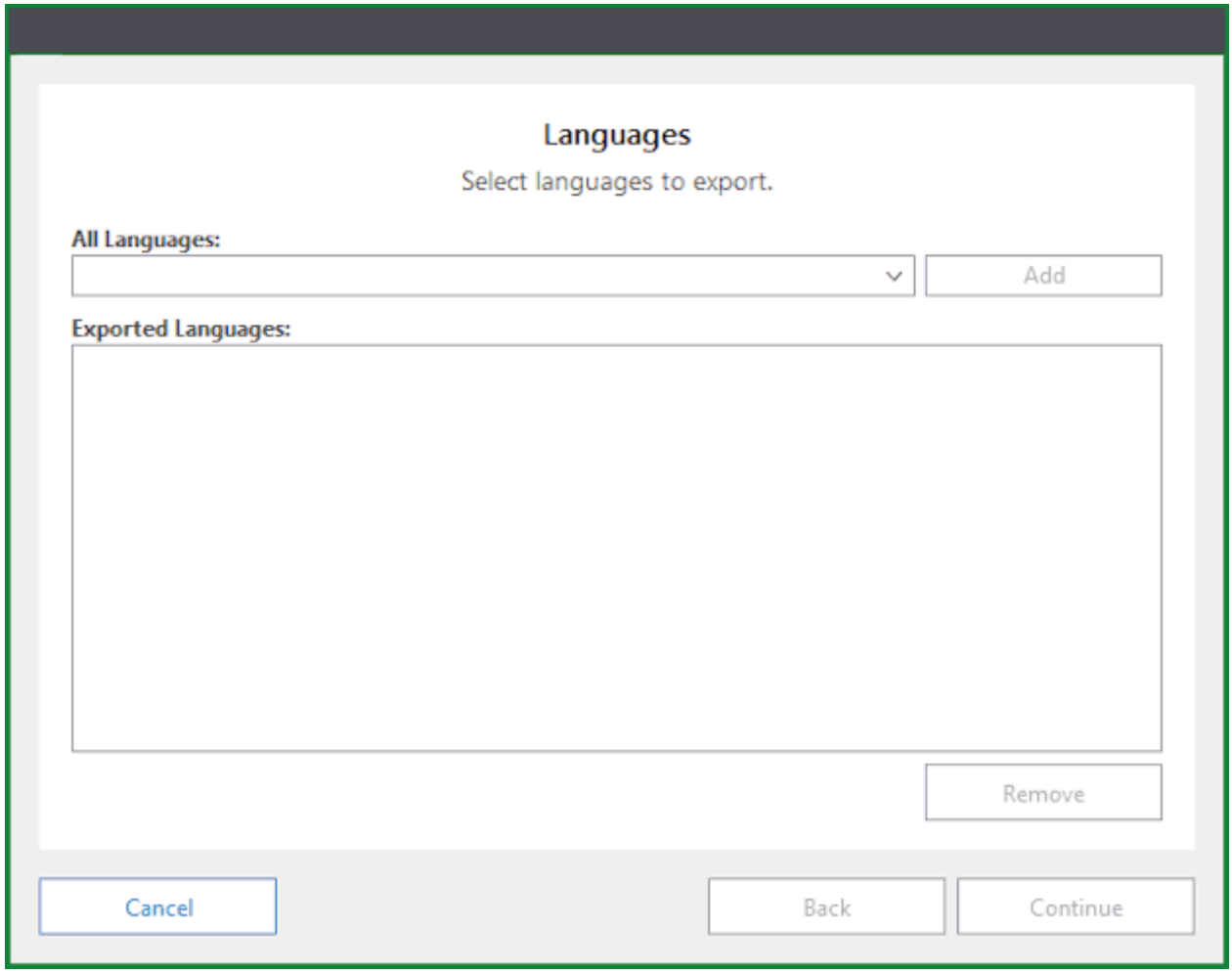
Note: If you have a **Primary Language** configured in the **Global Translation Settings** in the Configuration module, the specified language is selected by default in the **Template Primary Language** drop-down list.

4. Click **Save**.

Exporting Translations

When you want to export a Unity Form to be translated for a specific language, you must export the form's data. To export the Unity Form for translation.

1. In the Unity Forms Designer, click **Export** in the **Designer** ribbon. The **Languages** screen is displayed.



2. Select the language you want the form(s) to be translated to from the **All Languages** drop-down list.

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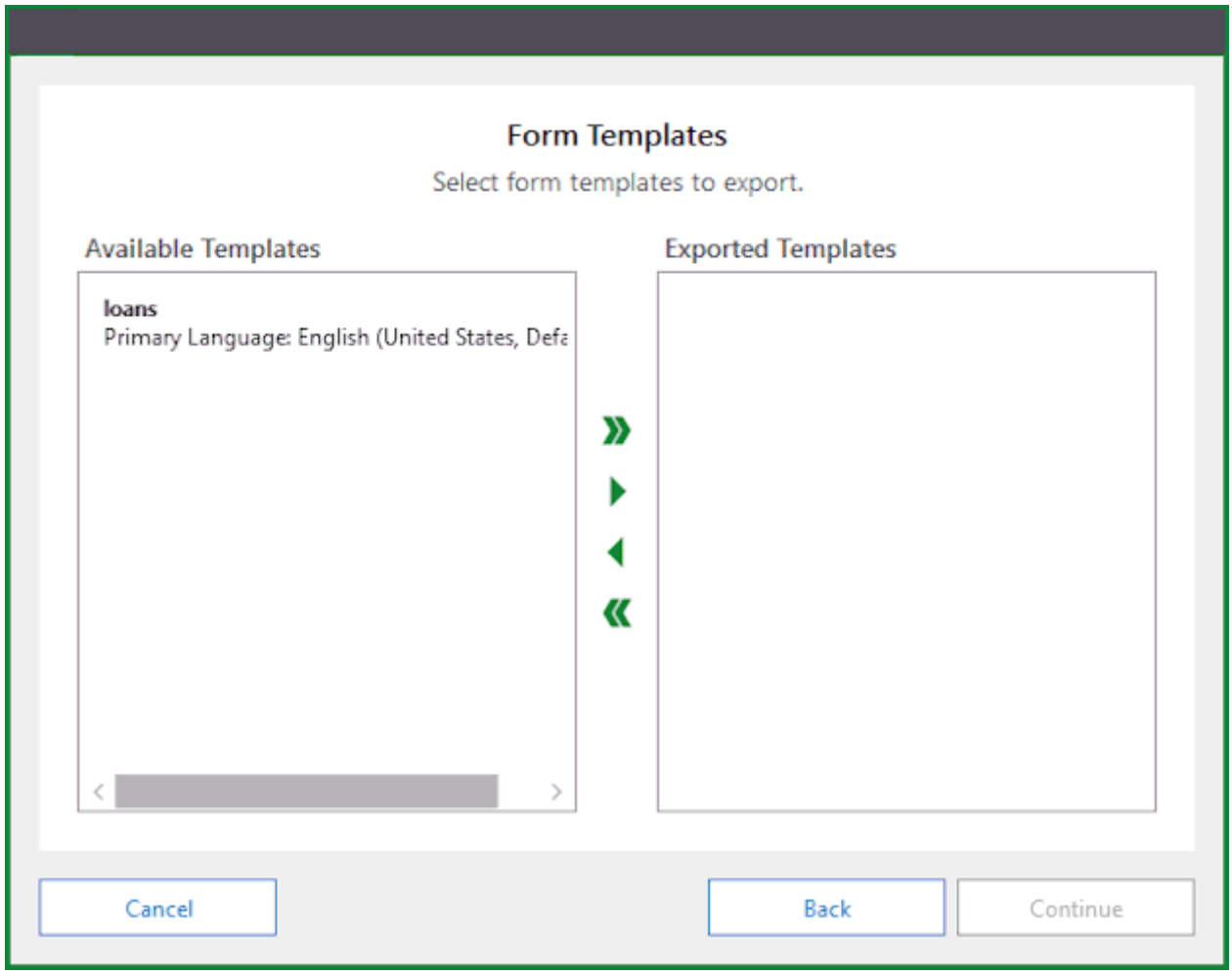
3. Click **Add**.

Note: You can add multiple languages. One file will be created for each language selected for export. Templates cannot be exported to the same language that is configured as the form's primary language.

4. Click **Continue**. The **Form Templates** screen is displayed.



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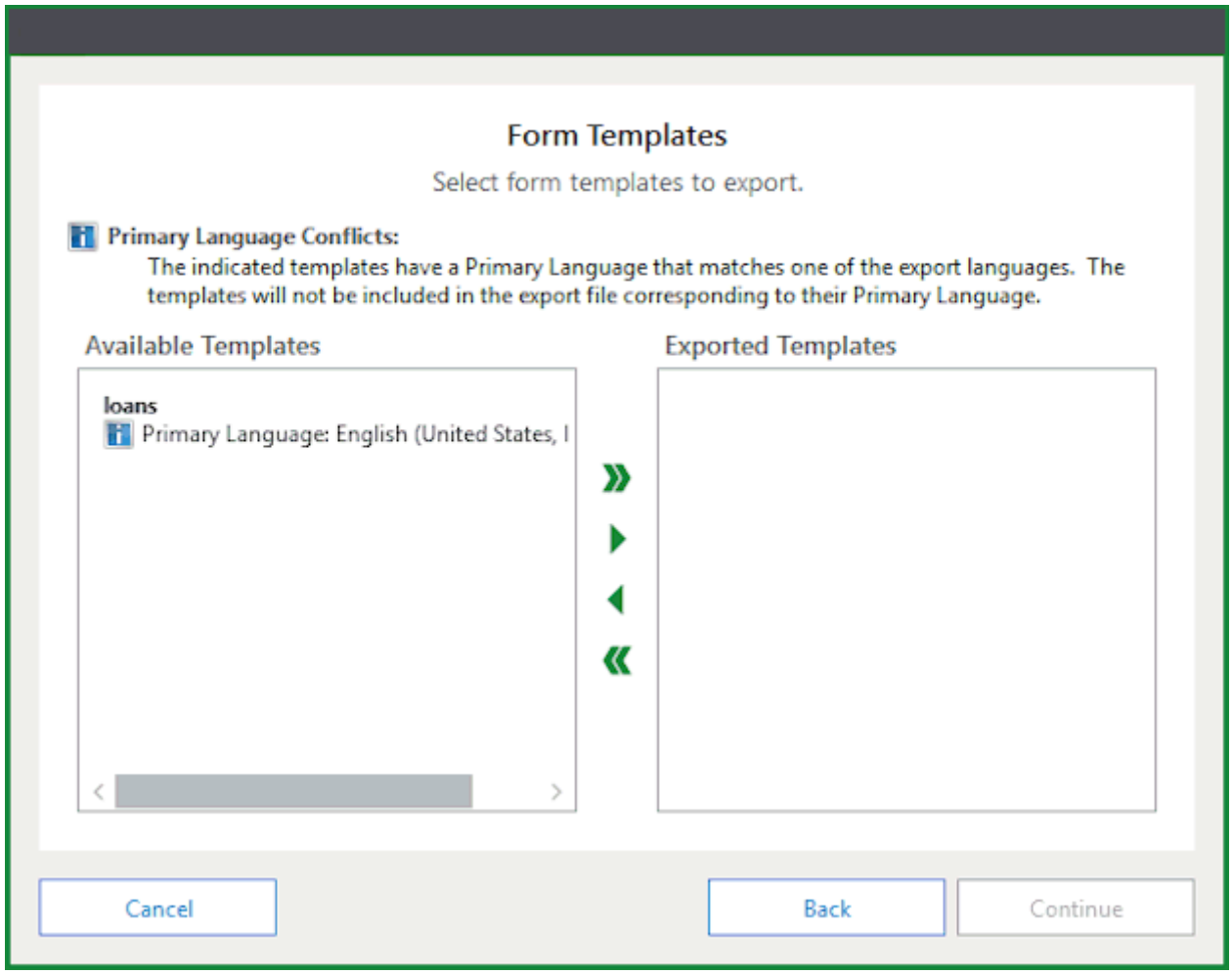
5. If a form template has the same primary language as one of the languages selected for export, a warning is displayed about the form, similar to the following example, that the form template will not be exported for its primary language.



6. Double-click the form template(s) you want to include in the export file to move the template(s) to the **Exported Templates** box.

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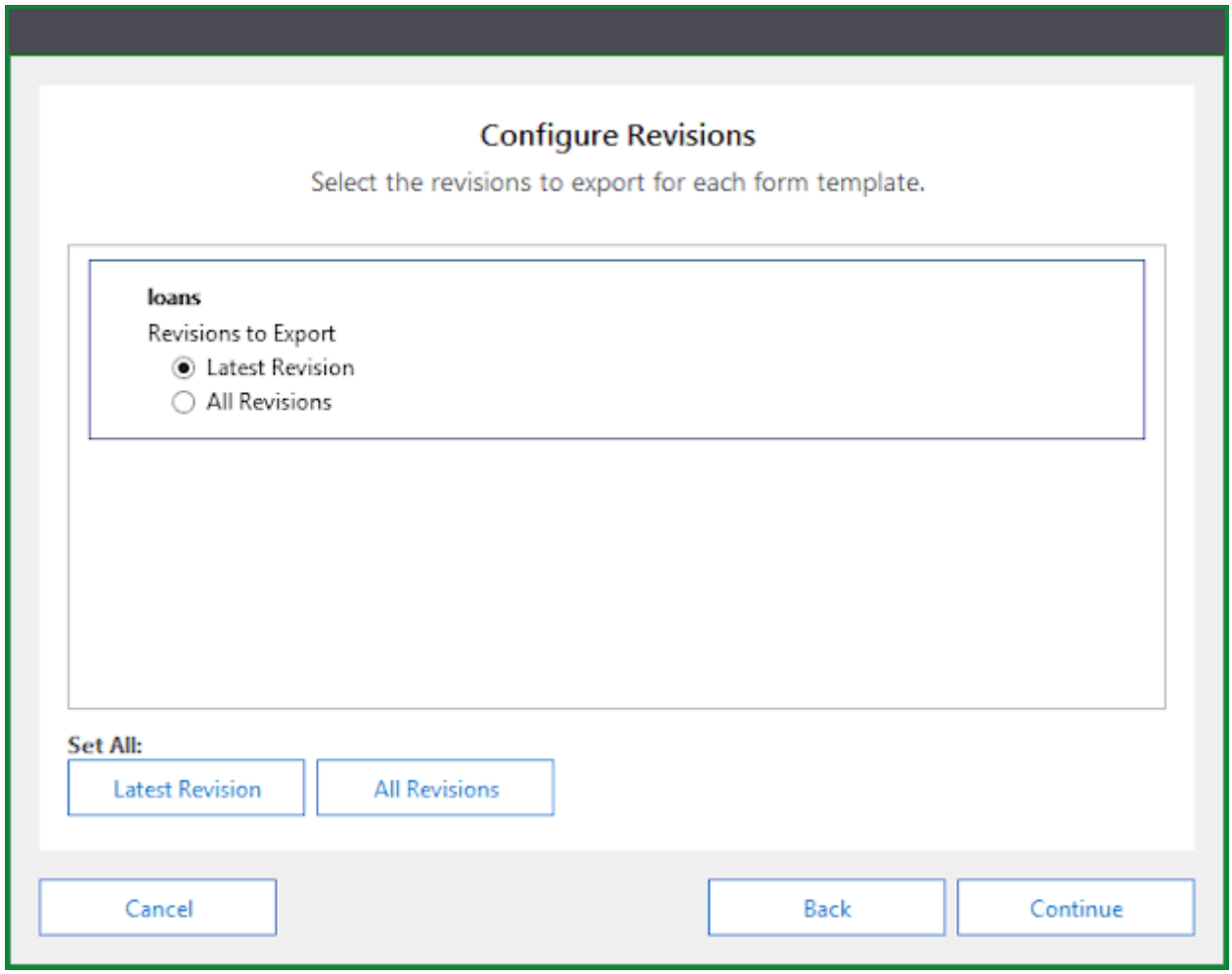
7. Click **Continue**. The **Configure Revisions** dialog box is displayed.



8. For each form being exported, either select **Latest Revision** to only export the most recent revision or select **All Revisions** to include all revisions of the template in the export. You can click **Latest Revision** or **All Revisions** under **Set All** to set all form template exports to the same revision selection.

Note: Only data from published versions of the template are included when exporting the latest draft of a template. Changes made in a draft are not reflected.

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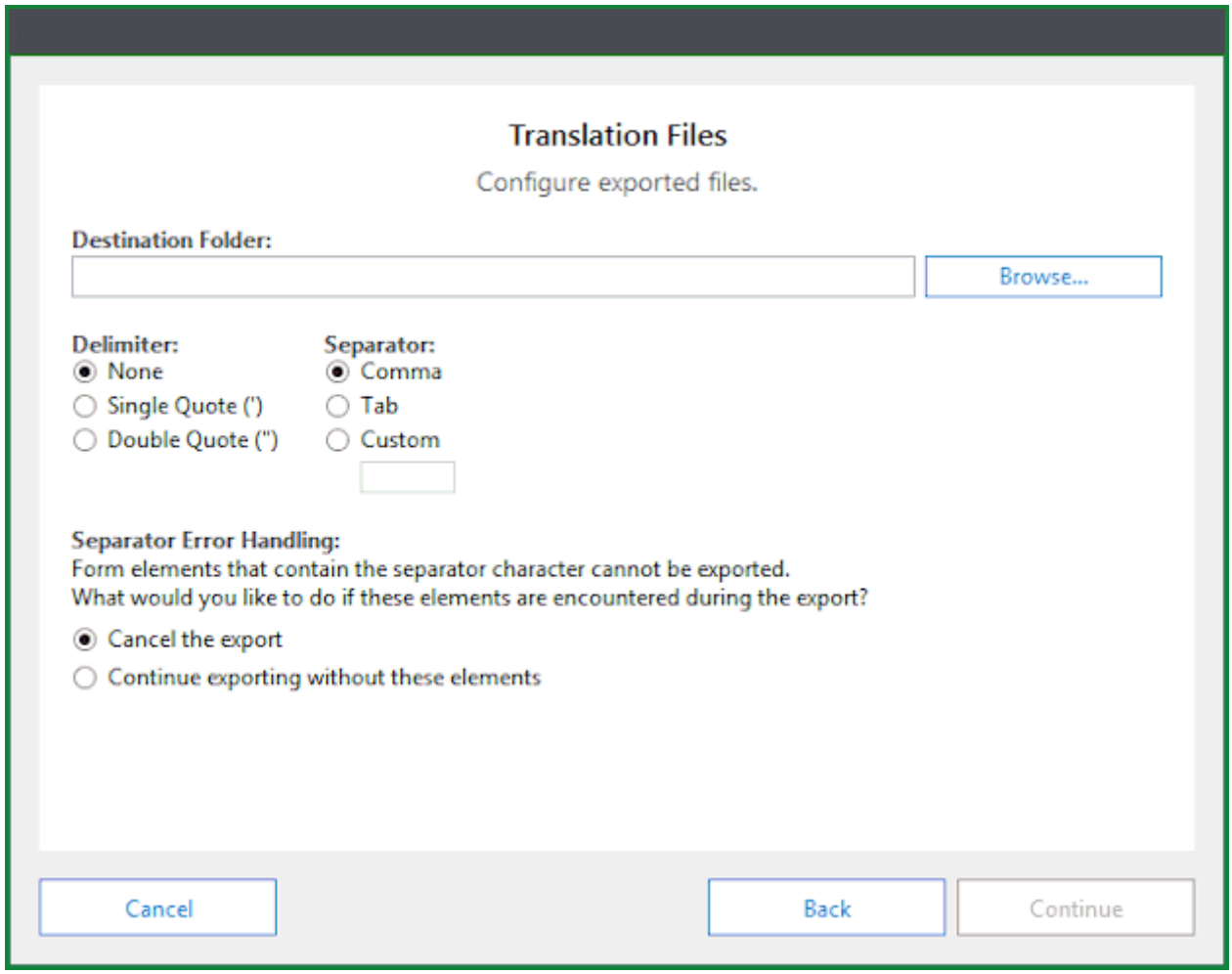
9. Click **Continue**. The **Translation Files** screen is displayed.



10. Click **Browse** to browse to the directory you want to save the export file.
11. Select the **Delimiter** and **Separator** you want to use to format the file. Delimiters enclose each element value. The separator differentiates between one element value and the next.
12. Select the option you want to use to handle errors that may occur during the export related to the separator you selected. If a form element contains the character used as the separator, the export will encounter an error. If you select **Cancel the export**, the export will be canceled if it encounters an error of this type. If you select **Continue exporting without these elements**, the export will continue, but elements that contain the separator character will not be included in the export file.
13. Click **Continue**.
14. Click **Finish**. If you want to cancel the export, you can click **Cancel**.

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15. Once the export has completed, a message stating **Export completed successfully**. is displayed. Click **OK**.

Note: If you export a form that has been previously translated and the values have been imported into the system, the translated values will be exported in subsequent exports.

Exported File Structure

Once the form template has been exported, it can be translated. The export file will contain something similar to the following:

```
ID,Description,Source,Translation (French (France Default)),Form
Name,Revisions,Source Type,Form ID,LCID
ufid,ufdesc,ufsource,uftranslation,ufformname,ufrev,ufsourcetype,ufformnum
,lcid
```

The translation of each element must be placed in the **Translation <Language>** position for the element. The text to be translated is the **Source** position in the element. The following is an example of a French translation:

```
account7,Label,Account #,Numéro de Compte,loans,23,1,108,1036
nestedtablefield28,Label,Item,Objet,loans,23,1,108,1036
nestedtablefield29,Label,Quantity,Quantité,loans,23,1,108,1036
nestedtable27,Label,Distribution Details,Détails de
Distribution,loans,23,1,108,1036
nestedtablefield30,Label,Department,Département,loans,23,1,108,1036
nestedtablefield31,Label,Quantity,Quantité,loans,23,1,108,1036
nestedtablefield32,Label,Cost,Coût,loans,23,1,108,1036
```

Note: You can translate this file in any tool that will import the text file and preserve the integrity of the file structure. When editing the text file, ensure you save the file in a way that preserves the required encoding.

Importing Translations

Once an exported file is translated in the target language, it can be imported back into the system.

Note: The file's structure integrity as it was exported must be maintained in order to successfully import the translated file.

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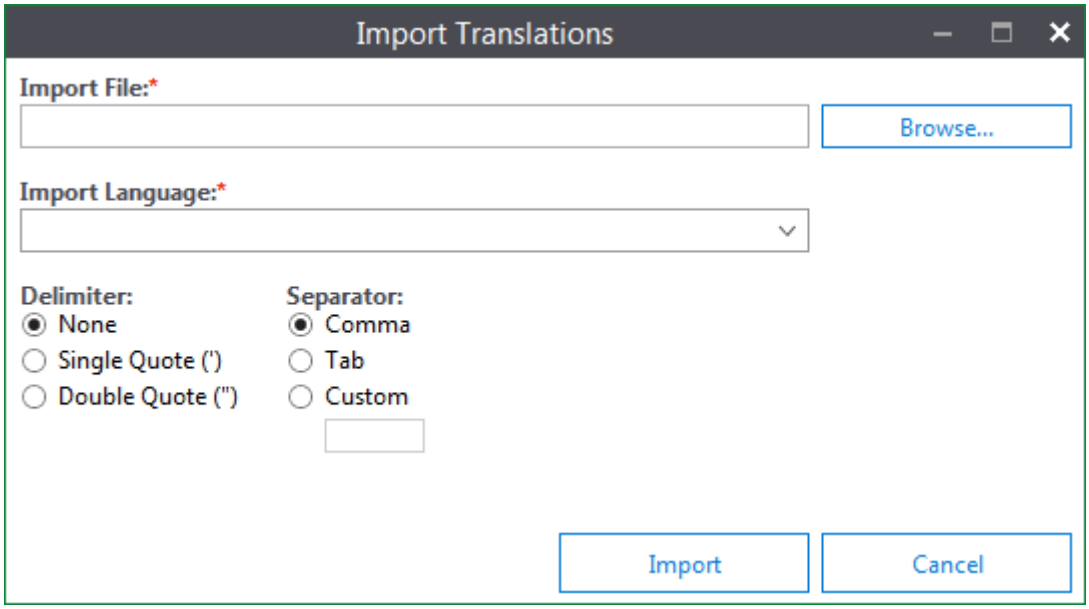
To import a translated file:

1. In the Unity Forms Designer, click **Import** in the **Designer** ribbon. The **Import Translations** dialog box is displayed.



2. Click **Browse**. The **Select Import File** dialog box is displayed.
3. Navigate to the directory that contains the import file and select the file.
4. Click **Open**.

Note: Ensure the import file is being imported in the same database from which it was exported. Importing the translated file into a database other than the database from which the data originated could cause adverse effects.

5. From the **Import Language** drop-down list, select the language of the file you are importing.
6. Select the **Delimiter** and **Separator** you used to format the file. Delimiters enclose each element value. The separator differentiates between one element value and the next.
7. Click **Import**. A message asking **Are you sure you want to import <language> translations?** is displayed. Click **Yes** to continue the import. Click **No** to cancel the import.

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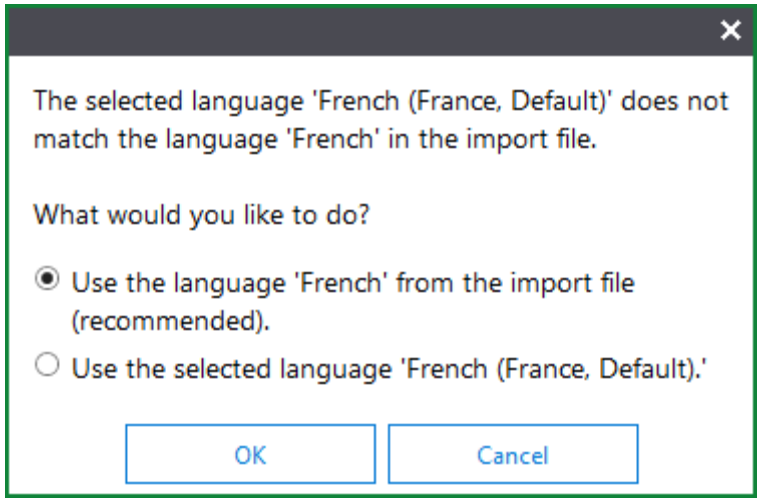
8. If the import file does not match the language specified during import, you will get a message similar to the following:



9. If you would like to use the language specified in the import file, select **Use the language "<language>" from the import file (recommended).** If you want to use the language you selected in the Import Translations dialog box, select **Use the selected language '<language>'**.
10. Click **OK**.
11. Upon successful completion a message stating **Import completed successfully** is displayed. Click **OK**.

Limitations

The following are limitations of Unity Forms:

- WorkView objects cannot be created from a Unity Form in Workflow.
- Unity Forms are not supported in the OnBase Client.
- When sending Unity Forms using the Distribution Service, section and page security configured on a Unity Form is not respected. The entire form is sent regardless of the security settings on the form.
- When sending a Unity Form using the Distribution Service or via the right-click **Send to** option, page tabs are not displayed in the form. The contents of the form is displayed laterally.
- When using **Send to | File** in a client and selecting **Native Format**, attachment controls, images, drawing controls, and signature controls are not supported and do not function in this context. Choosing Default/TIFF Format will display these controls.
- When using **Send to | File** in a client and selecting **Native Format**, Unity Forms may not have all of the same functionality they have when inside the OnBase system. For example, when not connected to the OnBase system, custom actions may not function as they would within the system.

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- You cannot use **Send to | File** in the OnBase Client for Unity Forms
- Printing Unity Forms from a remote/network print queue is not supported. (These are queues configured as Network Print Queue or Print Cluster Queue in the Configuration module.)
- Workflow forms do not support printing.
- Print formats are not respected when printing Unity Forms.
- When using the Unity Client, if a Unity Form's information exceeds an 8.5" x 11" space, the information outside of this page size is not included on the printed page.
- The following Keyword Type configurations are not supported on Unity Forms: hidden, security masking, encrypted, and Specific Currency data type.

Keyboard Shortcuts

The following keyboard shortcuts are available in the Designer.

Shortcut	Description
Enter	When a dialog box has an **OK** button, pressing the **Enter** key will function the same as the **OK** button. When in a wizard panel, pressing the **Enter** key will function the same as a **Next** or **Finish** button.
Esc	Pressing **Esc** will function the same as clicking a **Cancel** or a **Close** button in a displayed dialog.

In addition to these shortcuts, press **Alt** on the keyboard to display the shortcut keys available for the ribbons, menus, and buttons within the Unity Client interface.

Using Screen Reading Software

In Internet Explorer, the JAWS screen reader is supported. In Firefox, the NVDA screen reader is supported.

Note: In certain situations, some areas may not be fully supported due to lack of support by the screen reader itself.

Field Validation Using Non-Interactive Submittal

Validation is performed at the Application Server level for all non-interactive Unity Form submissions, except Workflow and Unity API. In these cases, the forms can be submitted and retrieved by users; however, the user will not be able to re-submit the form until the invalid fields are made valid.

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If an attempt is made to submit a Unity Form containing invalid fields non-interactively outside of Workflow or the Unity API, for example through a timer or service account, the form will not be submitted.

The Application Server validates all of the same data the client validates during interactive form submittal.

Workflow System Event for Unity Forms

A Workflow System Event is available that allows a task list to be executed when a Unity Form is saved.

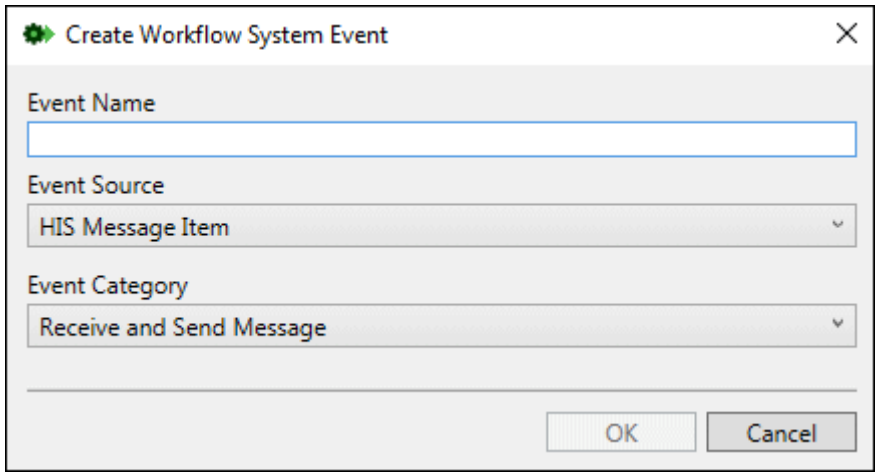
Creating System Events

System events are event-driven task lists related to specific items. System events are not tied to life cycles or queues; instead, they are executed when an event or status change occurs to a specific type of item.

Creating System Events

To create a system event:

1. In the **Workflow** tab of the **Repositories** pane, right-click and select **New | System Event**. The **Create Workflow System Event** dialog box is displayed.



2. Enter the name of the event in the **Event Name** field.
3. Select an **Event Source**. Select **Unity Form**. This is where the event will originate from.
4. Select **Unity Form Saved** from the **Event Category** drop-down list.
5. Click **OK**.
6. In the **Properties** pane, within the **General** tab, you can set the event **Break On** option and configure Workflow property mapping. See Creating System Events on page 194 for more information on these settings.

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7. Select the **Document Types** tab.
8. Click **Add**.
9. Select the Unity Form Document Type(s) you want associated with this System Event.
10. Click **OK**.
11. Select the **Documentation** tab.
12. Enter an **Overview** and a **Description** for the System Event.
13. Once you have created the System Event, configure the appropriate actions and rules.

Caution: When configuring this system event, ensure that you do not configure an infinite loop. Test your configuration in your test system before implementing this in your production system.

Configuring System Events

Once you have created a system event, it can be configured in the **Properties** pane. Certain configuration options, such as available properties and associated item types, will vary based on the selected event source and event category.

Mapping Properties

If the system event has event properties, these properties can be mapped to Workflow properties and used by any actions or rules configured as tasks for the event. To map properties:

1. In the **General** tab of the **Properties** pane, select the event property for which you want to configure a Workflow property.
2. In the **Map to Workflow Property** field, enter a property name, then click **Map**.

Note: Only alphanumeric characters are supported in property names.

To remove a mapped property, select the property, then click **Clear**.

Task List Options

In the **General** tab of the event's **Properties** pane, the following options are available:

Break On

The **Break On** section pertains to how the system reacts when it encounters a rule.

Note: Disabled rules are not used to evaluate success or failure.

Option	Description
Success	On success of an evaluation, the system stops processing the current task list on the document. This means that if a rule evaluates to true, it will complete the On True tasks before breaking.

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Option	Description
Failure	On failure of an evaluation, the system stops processing the current task list on the document. This means that if a rule evaluates to false, it will complete the On False tasks before breaking.
Never	This is the default setting. Processing of the task list continues, regardless of success or failure of the evaluation.

Additional Options

Option	Description
Disable	Temporarily disables the task list. Allows for the testing of changes to configuration without giving access to users. A task list in a disabled state appears grayed-out.
Use Scoped Property Bag	If you want to use a scoped property that persists only for the duration of a task's execution, select **Use Scoped Property Bag**. Otherwise, the property persists throughout a user's session.
Log Execution	When selected and the task is executed, an entry is made into the system's database. If the task list is disabled when an entry is made, it will be logged in the system's database that the task list was disabled at the time of execution.

Documentation

To add documentation to a system event, select the **Documentation** tab in the event's **Properties** pane. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Exporting and Importing Unity Forms

If you want to export a Unity Form in order to import it into another system, you can export **Form Templates** and **Unity Form Themes** within OnBase Studio or within the Configuration module.

Note: You can only export published forms.

Note: When mapping forms upon import, you must map them to forms that use the same form target.

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System Interaction

Digital Signatures

Unity Forms are not supported for use with the Digital Signatures module. A digital certificate applied to a Unity Form does not ensure the full integrity of the document.

Application Enabler

Application Enabler can be used to create a new Unity Form from scraped values in a line-of-business application when using the Unity Client. See the Application Enabler documentation for more information.

Scanning in Application Enabler

Application Enabler can be used to scan and attach documents directly on to a new Unity Form.

In order to scan documents directly to a Unity Form, three things are required:

- A Unity Form that has an attachment control needs to be configured.
- A line-of-business application needs to be enabled with Application Enabler to perform the **Create New Unity Form** context.
- A scanner needs to be connected to the system.

For more information, see the **Application Enabler** module reference guide.

Unity Briefcase

New Unity Forms can be created and synchronized with OnBase using the Unity Briefcase. In addition, existing Unity Forms can be opened and modified once synced with the Unity Briefcase.

The attachment control is not supported in the Unity Briefcase.

WorkView

Forms can be created in WorkView. Forms can be created directly from WorkView objects and populate applicable data in the form from the WorkView object. A form must be configured as any other form must be created. Once the form is created and available in the OnBase system, it must be mapped to a WorkView class within the WorkView Configuration tool. See the WorkView documentation for information about Associating Forms with Classes.

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Overview

FormPop allows users to view and edit E-Forms and Unity Forms using a simplified Web Client viewer interface, without any extra OnBase functionality. This allows users outside of OnBase to follow web links to view and edit forms in OnBase.

FormPop does not allow users to create new forms by following a FormPop link.

For a list of browsers that are supported by FormPop, see **FormPop and PDFPop Browser Requirements** in the **Web Server** module reference guide.

Note: FormPop is only supported using the HTML Web Client. Links are always opened in the HTML Web Client regardless of how the Web Server is configured.

Usage

FormPop functionality is described in the following sections:

- Retrieving Forms Using FormPop on page 198
- Editing Existing Forms Using FormPop on page 198

For additional information on the functionality available with forms, see the **E-Forms** or **Unity Forms** help files or module reference guides.

Retrieving Forms Using FormPop

You can use FormPop to retrieve and edit forms in OnBase by clicking a link to the form from a Web site or email message. You can also use the DocPop URL Creator to generate a link and then modify the generated URL, as shown in the example below:

http://WebServer/AppNet/docpop/**docpop.aspx**?doctypeid=139

becomes:

http://WebServer/AppNet/docpop/**FormPop.aspx**?doctypeid=139

For information on using the DocPop URL Creator, see the **DocPop** module reference guide.

After accessing a FormPop link, a document select list or form is displayed.

Editing Existing Forms Using FormPop

After accessing a FormPop link, edit the necessary fields and save or submit the form.

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Configuration

The configuration settings for using FormPop are set in the Web Server's Web.config file. For information on FormPop configuration settings, see FormPop Vars on page 199.

For information specific to configuring E-Forms or Unity Forms, see the **E-Forms** or **Unity Forms** module reference guides.

For information about the variables available in a FormPop query string, see the **DocPop** module reference guide, which contains a comprehensive list of query string variables.

FormPop Vars

FormPop-specific settings are located in the **Hyland.Web.FormPop** element of the Web Server's Web.config file. The only required setting is a data source. You can either configure one in the Web Server's Web.config or pass it along the query string. FormPop results are displayed using the HTML Web Client.

The following settings are located in the **Hyland.Web.FormPop** element of the Web Server's Web.config file.

username - Enter the user name to use with default login with FormPop, if you want to use a single user account for access. When **enableDefaultLogin** is set to **true**, users can automatically log on to FormPop using the credentials provided in the **username** and **password** settings.

password - Enter the password to use with default login with FormPop, if you want to use a single user account for access. When **enableDefaultLogin** is set to **true**, users can automatically log on to FormPop using the credentials provided in the **username** and **password** settings.

datasource - Enter the name of the data source to use with FormPop. This is a required value.

domain - Enter the domain to log on to if you are using Active Directory authentication.

embedded - Set this to **true** when you are embedding FormPop results in a custom Web page and you want the FormPop results to be displayed in a frame or iframe within the same browser window. When set to **false**, FormPop results are opened in a new window.

- If **embedded** is set to **true** and results are not embedded in another Web page, then the address bar and browser toolbars will be displayed when a user accesses the FormPop URL.
- If FormPop results will not be embedded in Web pages, set **embedded** to **false**. The address bar and toolbars will be hidden when FormPop results are displayed.

enableDefaultLogin - Set this to **true** to have FormPop use the **username** and **password** credentials specified in the **Hyland.Web.DocPop** element. Set this to **false** to have FormPop either attempt other authentication methods (if they are configured) or prompt the user for credentials.

enableHTTPLogin - Set this to **true** to pass login credentials to the server on the query string or to post them through an HTML form. Set this to **false** if FormPop should either attempt other authentication methods (if they are configured) or prompt the user for credentials.

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enableAutoLogin - Set this to **true** to use domain credentials to log on to FormPop automatically. When this is set to **false**, FormPop either attempts other authentication methods (if they are configured) or prompts the user for credentials. If you enable this setting, ensure that the Web Server is configured for Active Directory authentication. See the **Legacy Authentication Methods** module reference guide for more information about Active Directory authentication.

Set **enableAutoLogin** to **true** if you are using Integration for Single Sign-On. If OnBase is configured for Active Directory or LDAP authentication, but you want to use Single Sign-On with FormPop, set both **forceSSOAutoLoginOverDomain** and FormPop's **enableAutoLogin** setting to **true**. For more information about Integration for Single Sign-On, see the **Legacy Authentication Methods** module reference guide.

enableHTTPDataSource - Set this to **true** to pass the data source on the query string. Set to **false** to use the FormPop data source in the Web Server's Web.config.

enableChecksum - If set to **true**, a checksum value will be added to the URL query string. To enable checksums, you are also required to enter a checksum key value in the FormPop **checksum** setting, which is used to create the checksum value in the URL. When a user attempts to retrieve a document using the URL, FormPop compares the checksum in the query string to the expected checksum. If the values match, the document is displayed. If the values do not match, the user is presented with an error. This is to prevent users from modifying query strings and accessing documents they should not access. If set to **false**, no checksum is created.

checksum - Enter the unique string value used as a key for external, dynamic checksum creation. This string value should not be well known. The **checksum** setting applies only when **enableChecksum** is set to **true** and an external automated process is being used to dynamically generate FormPop links.

Note: Configuration of this setting is required for checksum creation and validation.

- The Web Server web.config file also has an **enableChecksum** setting within the **<Hyland.Web.DocPop>** node that must be set to **true**. You must also set the **checksum** setting to the appropriate value within that node.
- The Application Server web.config file also contains a Pop integration checksum setting: **ChecksumKey**. This setting is used for checksum generation when the docID is used from outside of the Web Client solution (for example, in Workflow notifications). If you use this feature, the **ChecksumKey** value in the Application Server web.config file must match the **checksum** value in the **Hyland.Web.FormPop** element of the Web Server web.config file. For more information about checksum generation, please refer to the Hyland SDK.
- If you are using the Workflow action **Med - Send HL7 Message**, the Hyland.Web.FormPop **checksum** value should be empty. If an external process will generate the FormPop URLs and you want to use checksums, then a separate virtual directory for FormPop should be configured.

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enableCoreQueryAPILicense - This setting requires OnBase to be licensed for Core Query API (Retrievals Per Hour). Set this setting to **true** if you want users to consume Core Query API licenses when using FormPop. Core Query API licenses help prevent the unnecessary consumption of Concurrent Client licenses. When this setting is set to **true**, a Core Query API license is consumed as soon as a user logs on to FormPop and is released immediately after the user logs off. When the **enableCoreQueryAPILicense** setting is set to **false**, a Concurrent Client license is used.

Note: Core Query API licenses are only available for external users.

AutoDisplayOneDocument - Set this setting to **true** to always display only the viewer for FormPop queries that return a single result. When this setting is set to **false**, FormPop displays both the hit list and the viewer for queries that return a single result. This behavior can be overridden by the **viewerOnlyForSingle** variable in the FormPop query string. The **viewerOnlyForSingle** variable has no effect when **AutoDisplayOneDocument** is set to **true**.

Embedding FormPop Results in a Web Page

By default, if you are embedding content from the OnBase Web Server into a web page, the page and the embedded content must be on the same domain. If your solution requires embedding Web Server content into a different domain, you can configure the Web Server to allow this. For more information, see the section on X-Frame-Options in the **Web Server** module reference guide.

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Creating a Shared Form Integration URL

This chapter is to aid you in configuring a shared form URL for an integration. This assumes you have the technical expertise necessary to create a shared form URL integration. There are several programming and security concepts that must be understood to properly utilize integrations, including URL parameterization, URL encoding, and cryptographic hashing.

To create a shared form URL for an integration, follow these steps:

1. Configure an integration for the form that has a token available. See Configuring Unity Form Integrations on page 176 for more information.
2. Generate a shared form URL for a form using the Forms Designer. Be sure to select **Use Integration** and select the correct integration that is configured. See Sharing Forms on page 170 for more information.

Note: It is recommended to use an encrypted connection when configuring a shared form URL with an integration.

3. Create a parameter string for fields to be pre-populated in the format:
   `&ufprefieldid1=value&ufprefieldid2=value&ufprefieldid3=value`
   The URL string should contain the '&' in the beginning, as the server expects that format when it reconstructs the string.
   When creating the URL to calculate the hash, the constant **ufpre** should be attached to the beginning of every field ID. This is so that it will be easy to identify the fields that will be pre-populated from the URL string. The field IDs on the form do not need to be changed.
   Escape only the ID and value portion of the URL. Do not escape the entire string at once, but just the individual parameters one by one. Escaping the entire URL string would also escape the '&' and '=' characters used to append the field ID and value pairs on to the URL. Do not escape the '&' and '=' characters.
4. Parse the URL escaped parameter string into UTF-8 format.
5. Ensure the token is a base64 string. The token should already be a base64 string by default.

Note: Do not share the token with anyone. The hashing will be secure only as long as the token is kept as secure as possible.

6. Calculate the hash of the URL string, which was parsed into UTF-8 format, using the HMAC method and SHA256 algorithm with the token as the secret.

Note: Using C# to generate the hash is more secure when compared to JavaScript.

Note: Hash values are case sensitive and should match the case of keyword values associated with the form.

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7. Convert the calculated hash into base64 string and append it to the URL, escaping the base64 string.
8. Paste the URL Encoded String value into the shared form URL and add the generated hash so that the shared form URL looks similar to the following:

   ```
   http://<localhost>/<webserver>/Unityform.aspx?d1=<encrypted
   configurationparameters>&ufprefieldid1=value&ufprefieldid2=value&ufpr
   efieldid3=value&ufprehash=<generatedHash>
   ```
9. When you click on the generated link, the form should open with the values for the given fields populated.

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The following best practice recommendations were assembled by a team of OnBase subject matter experts. They represent the accumulation of years of experience installing and configuring OnBase solutions.

The following recommendations are general in nature, and are applicable to most OnBase solutions and network environments. Depending on your solution design and your organization's needs, not all of the best practice recommendations listed below may apply to, or be recommended for, your OnBase solution.

Carefully consider the impact of making any changes, including those listed below, to your OnBase solution prior to implementing them in a production environment.

Configuration

When creating a Unity Form in a test system, use Workflow export and import to export the form out of the test system and bring the form into the production system.

When configuring the auto-name of the Document Type associated with a Unity Form in the Configuration module, it is recommended to include the name of the form in the auto-name string to easily identify what form is associated with the Document Type.

It is recommended that only one form is associated with a Document Type. Multiple forms should be associated with a single Document Type when specific criteria are met. These instances are outlined in Configuring Document Types for Similar Forms on page 11.

Always test drive a Unity Form before publishing it. By test driving, you can ensure the form works the way you intended it to before making it available to users.

When using a keyword configured to use a data set, it is recommended to have the form pull the data set values from OnBase, rather than creating a Unity Forms data set.

It is recommended to rename control IDs to unique and intuitive names, especially when using these controls in Custom Actions or the Copy Property to/from Unity Form Field or Copy Property to/from Unity Form Field Workflow actions.

Forms should be built in such a way to serve a specific purpose. Adding too much functionality onto a Unity Form can potentially cause performance issues.

Do not build business logic into Unity Forms if possible.

Fields pre-populated using an integration cannot be modified. If a pre-populated field from an integration is modified, the form cannot be submitted. As a best practice, it is recommended to configure these fields as read-only.

Using C# to generate the hash is more secure when compared to JavaScript when configuring hashes used with shared form integrations.

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It is recommended to use an encrypted connection when configuring a shared form URL with an integration.

Mobile Forms

On the **Form Properties** tab, select **Scale Viewport to Screen Size** for all forms intended to be used via mobile devices. For all newly created form templates, this option is selected by default.

Design the form vertically to be consistent with mobile design practices. Mobile forms will function properly on a desktop, so designing forms with mobile functionality in mind keeps administrators from having to recreate the forms in the future.

Text boxes set to a display size larger than a mobile device screen are automatically scaled to the full size of the mobile device screen.

Tables and nested tables do not respond properly on mobile devices. To simulate tables, add a panel inside a repeating section. Multiple vertically-oriented columns can be added, but it is a best practice to only use one or two columns. A single, horizontally-oriented column wraps the text boxes when needed, making the column more responsive to a mobile device's resolution.

Stand-alone panels should be five columns or fewer in width and take into consideration the length of the data being entered into the field.

If a large amount of data is anticipated for a single field, it is a best practice to insert a multiline text box with the **Automatically Expand Height** option selected.

To prevent users from needing to scroll back to the top of the form to change pages, it is a best practice to create a custom action that creates a condition button a user can click to automatically navigate to the first field on the next page of the form.

Radio button groups wrap when appropriate and are spaced differently when rendered in a mobile environment.

The drawing control is not supported on mobile devices.

Images do not scale on mobile devices. If you use an image control, verify that the image being used cooperates with the mobile device's resolution.

It is a best practice to always test your forms before publishing them. The test drive functionality simulates rendering when reducing the size of the test drive window. If possible, test the forms using multiple devices on multiple operating systems by using shared forms.

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Using the System Assessment Tool

To run the System Assessment Tool:

1. Navigate to the **SAT** folder of your OnBase Client or OnBase Core Services build.
2. Double-click **System Assessment Tool.exe**.
3. The System Assessment Results page is opened in a web browser.
4. Results are returned in two sections:
   - **Client Report** - This section checks the workstation's components against the OnBase Client and Unity Client minimum requirements. It contains the following results:

Component	Description
Operating System	The operating system installed on the workstation.
CPU	The speed of the workstation's CPU.
RAM	The amount of RAM on the workstation.
Free Hard Disk Space	The amount of free hard disk space on the workstation.
Video Memory	The amount of video memory on the workstation.
.NET Framework	Whether or not the required Microsoft .NET Framework is installed on the workstation.
Internet Browser	The Internet browser installed on the workstation.
Visual C++ Redistributable	Whether or not the required Microsoft Visual C++ Redistributable Package is installed on the workstation.

   - **Server Report** - This section checks the workstation's components against the OnBase Web/Application Server minimum requirements. It contains the following results:

Component	Description
Operating System	The operating system installed on the workstation.
CPU	The speed of the workstation's CPU.
RAM	The amount of RAM on the workstation.

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Component	Description
Free Hard Disk Space	The amount of free hard disk space on the workstation.
.NET Framework	Whether or not the required Microsoft .NET Framework is installed on the workstation.
Internet Browser	The Internet browser installed on the workstation.
Visual C++ Redistributable	Whether or not the required Microsoft Visual C++ Redistributable Package is installed on the workstation.

5. One of the following statuses is displayed next to each component:

Status	Description
PASS	This component meets or exceeds the minimum requirement.
FAIL	This component does not meet the minimum requirement.

Note: The description for each **PASS** component indicates whether the component meets the minimum requirement or the recommended requirement.

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Configuring Item Generators

In order to test Unity Forms, Image Forms, or other processes, you may want to generate test items within OnBase Studio. You can configure a generator to generate specific items for testing. For more information about using OnBase Studio, see the OnBase Studio module reference guide.

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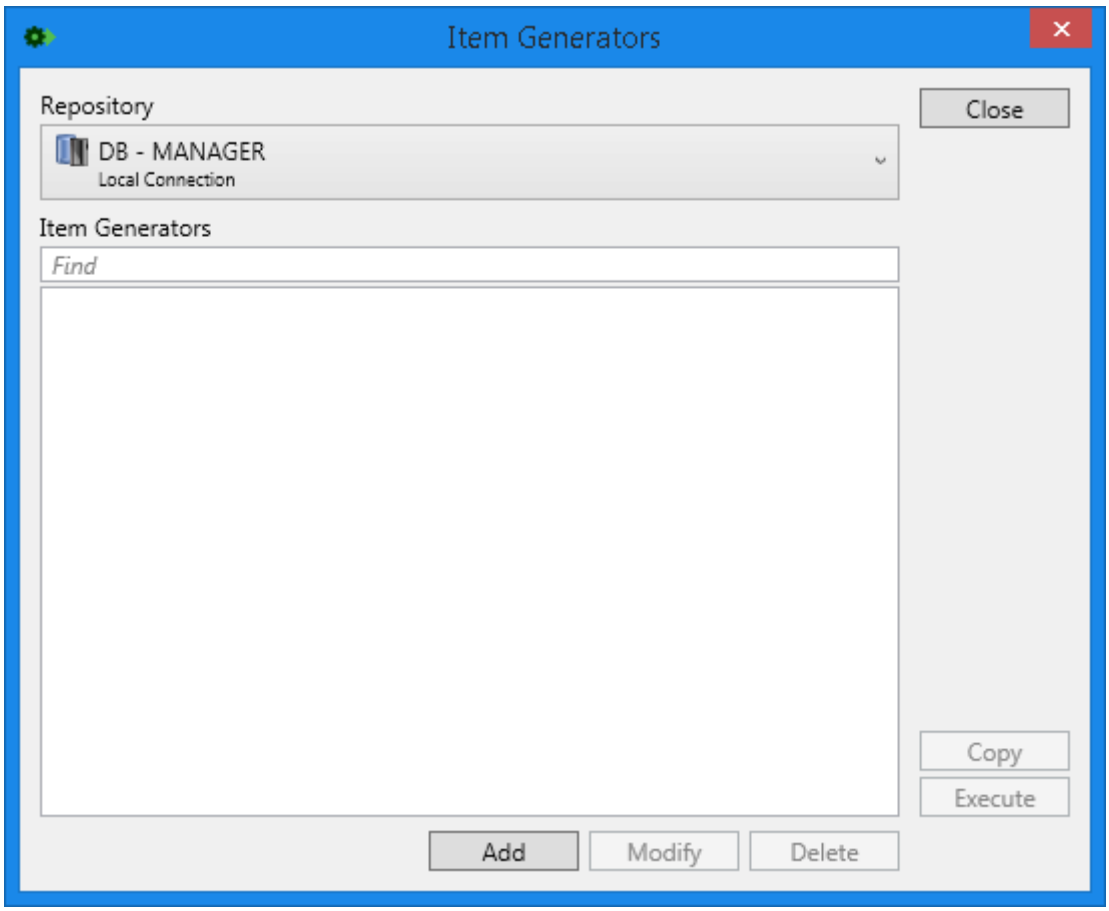
Creating Generators

Generators can be configured to create specific items and a specific number of items. You can configure multiple generators. To create a generator:

1. In the **Home** ribbon, within the **Item Generation** ribbon group, click **Item Generators**.



Note: You can locate a specific, existing generator item by entering text that will identify the generator item in the **Find** field. The generator items displayed will be narrowed down to the generator items that contain the characters entered.

Note: You can modify an existing item generator by selecting it and clicking **Modify**. To delete an item generator, select it and click **Delete**. Item generators associated with batches cannot be deleted. You can copy an existing item generator by selecting it and clicking **Copy**. The **Item Generator Wizard** is displayed. The copied item generator must have a unique name in order to be created.

2. Select the **Repository** from the drop-down list for which you want to create a generator.

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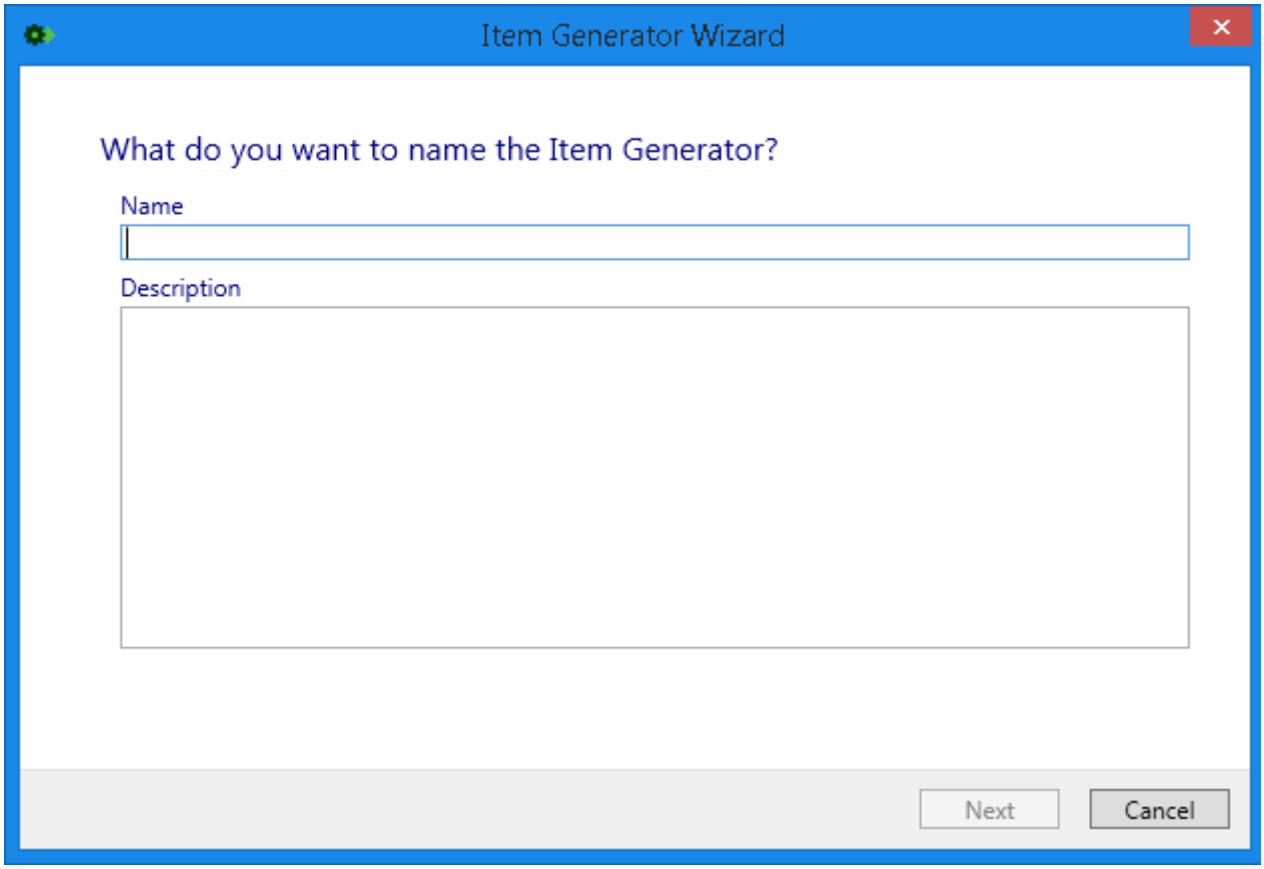
3. Click **Add**.



4. Enter the **Name** and the **Description** for the generator.
5. Click **Next**.

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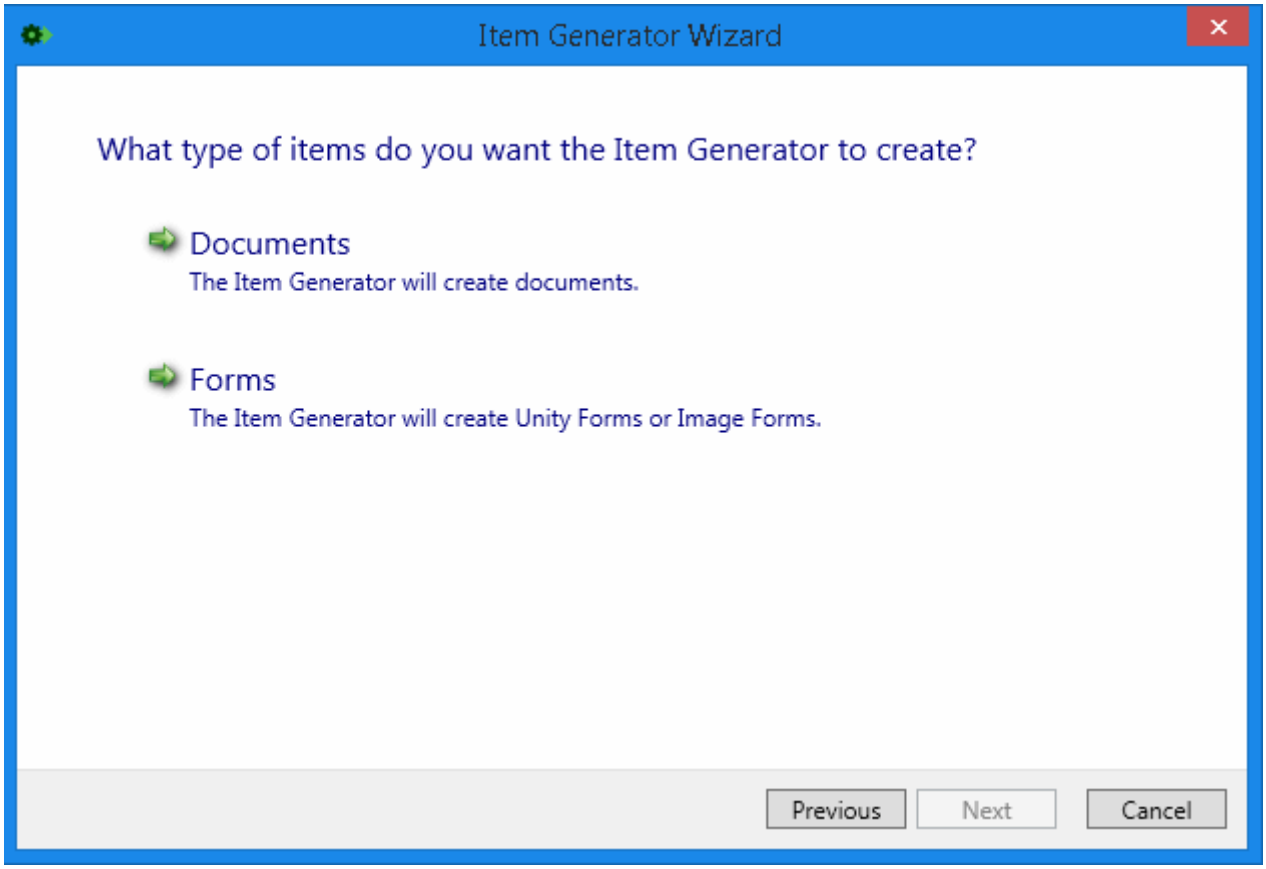

6. You must decide if you want to generate documents or forms. When generating documents, Document Types that are configured as Image File Form, Text File Format, or Electronic Form Default File Formats can be generated. If a Document Type is selected that does not have one of these file formats configured, the documents will be generated as text documents.

   To generate documents, see Generating Documents on page 212.

   To generate forms, see Generating Forms on page 222.

Note: Custom Actions are not supported with generated Unity Forms or Image Forms.

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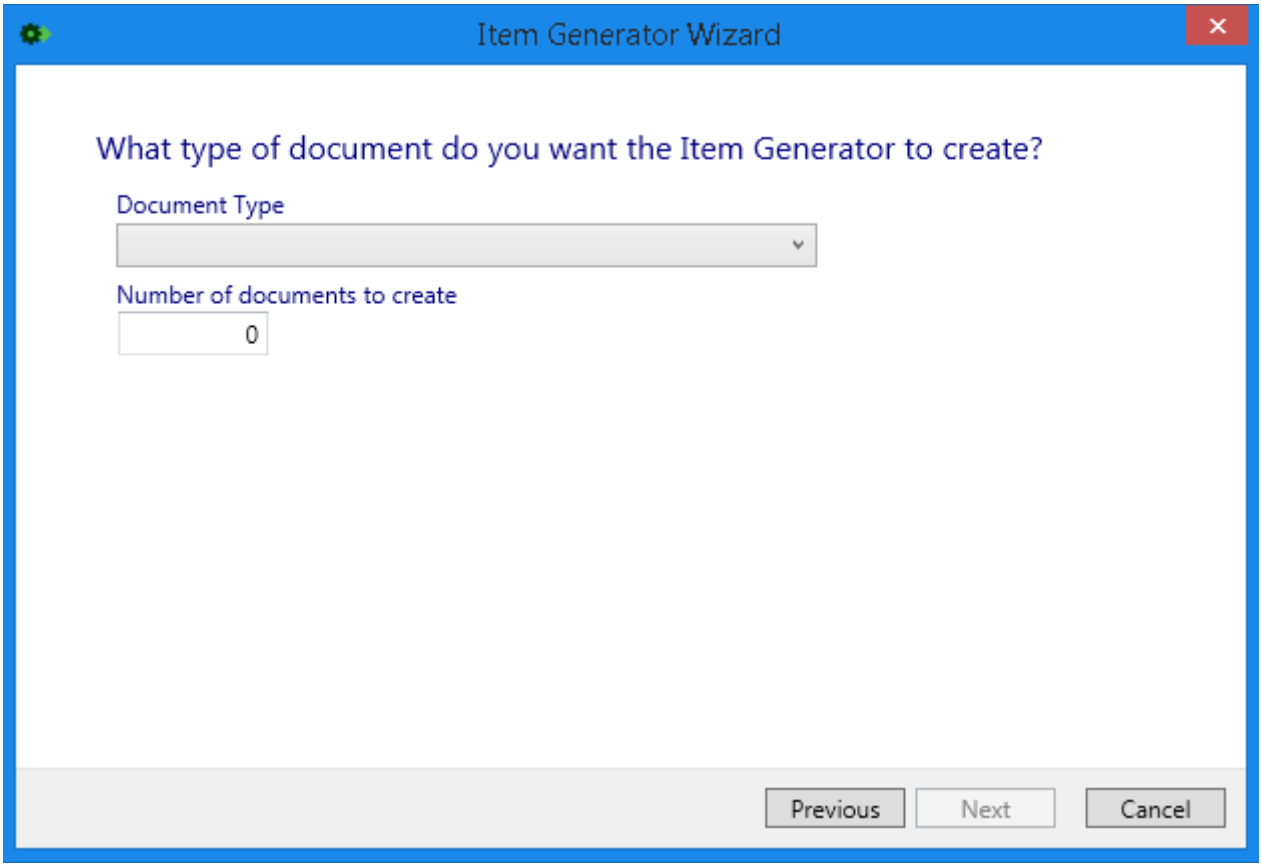
Generating Documents

1. If you want to generate documents, click **Documents**.



2. Select the **Document Type** from the drop-down list.

Note: When generating documents, Document Types that are configured as Image File Format or Text File Format can be generated. If a Document Type is selected that does not have one of these file formats configured, the documents will be generated as text documents. Document Types that have E-Form Templates assigned will be generated as E-Forms even if the Document Type is not configured with an E-Form Default File Format.

3. Enter the number of documents you want to generate in the **Number of documents to create** field.

Note: Up to 999,999 items can be generated.

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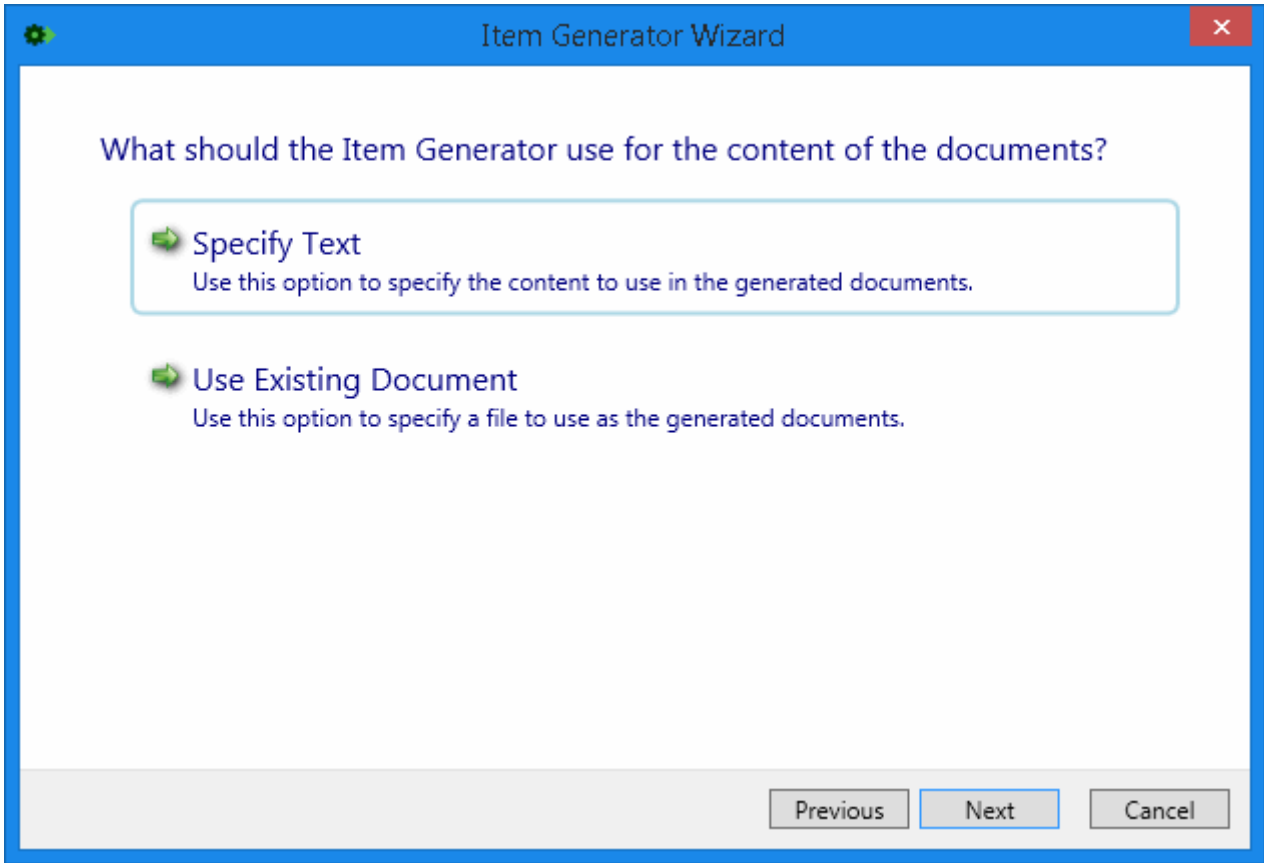
4. Click **Next**.



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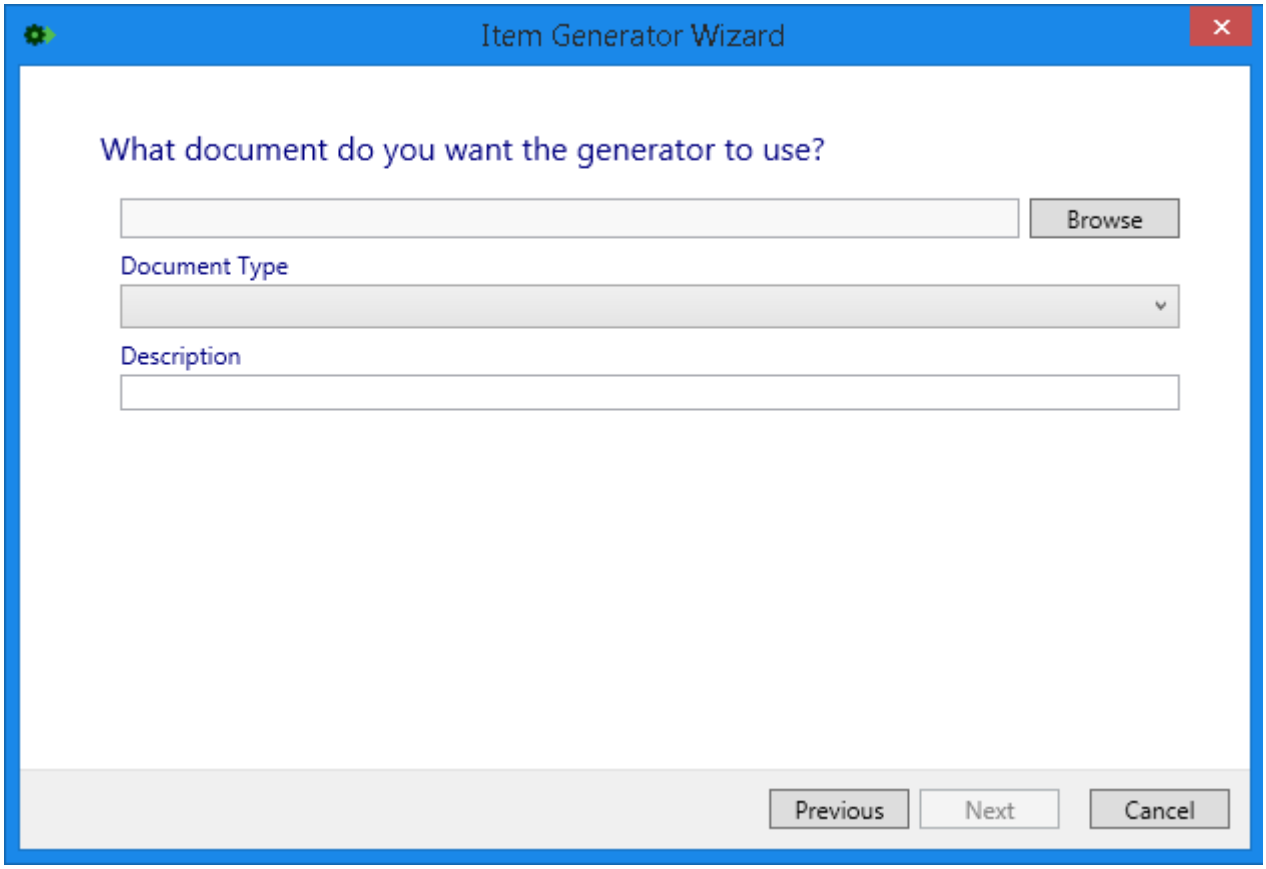
5. Specify what the item generator should use for document contents. Select one of the following:
    - **Specify Text:** Select this option to enter specific text as content for the document. If **Specify Text** is selected, click **Next**, then skip to step 10.

Note: This option is not available when generating E-Forms.

    - **Use Existing Document:** Select this option if you want to select a file to be used as document content.
6. Click **Next**.



7. Click **Browse** to select the file you want to use for document contents.
8. Select a **Document Type** for the file. The selected document is imported into OnBase using the selected Document Type.

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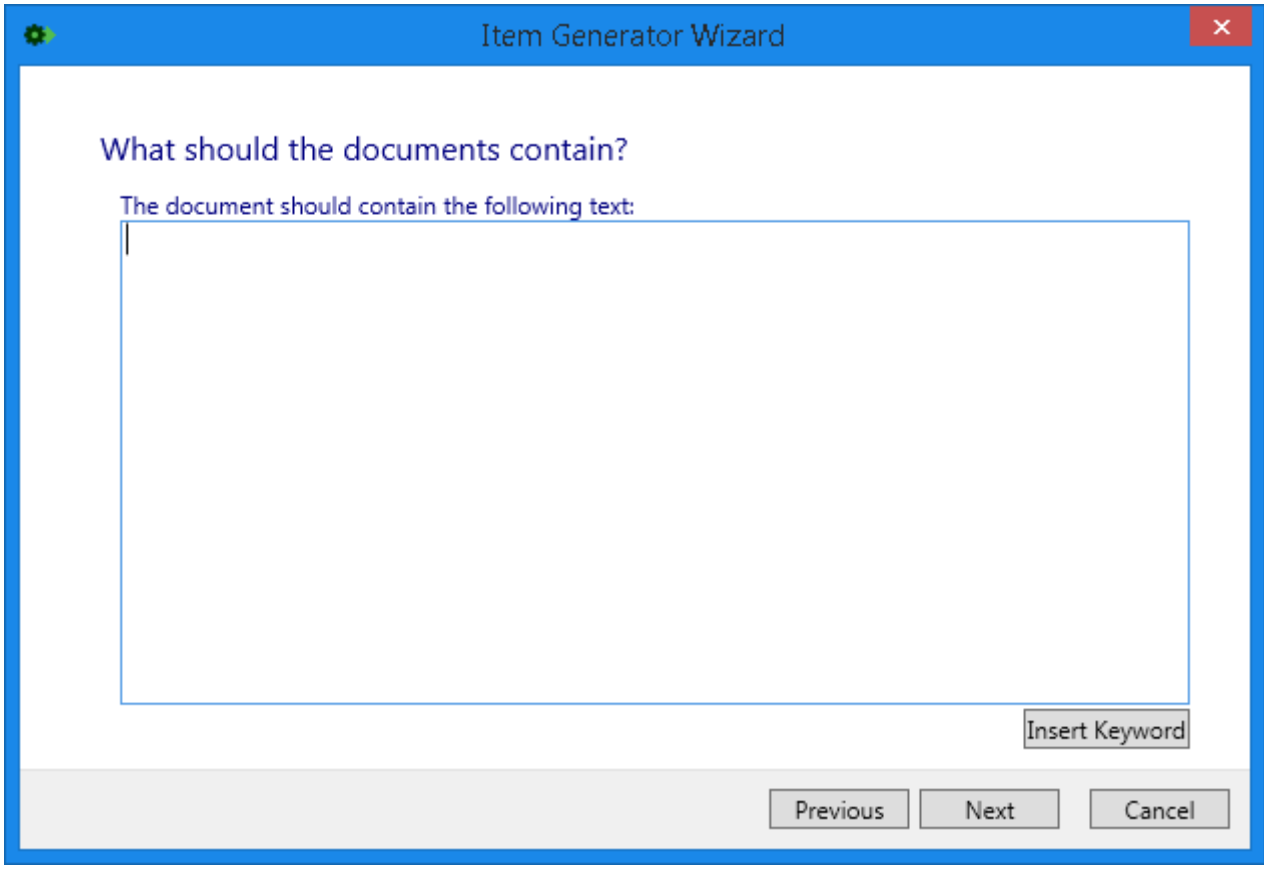
9. If the selected Document Type uses a Description Keyword, the **Description** field is available. Enter a Keyword Value for the Description Keyword.

Note: The **Description** field only allows the maximum number of characters that the Description Keyword is configured to use.

Skip to step 13.



10. Enter the information you want to include in the documents in the **The document should contain the following text** field. This information will be viewable in the document viewer when the document is open.

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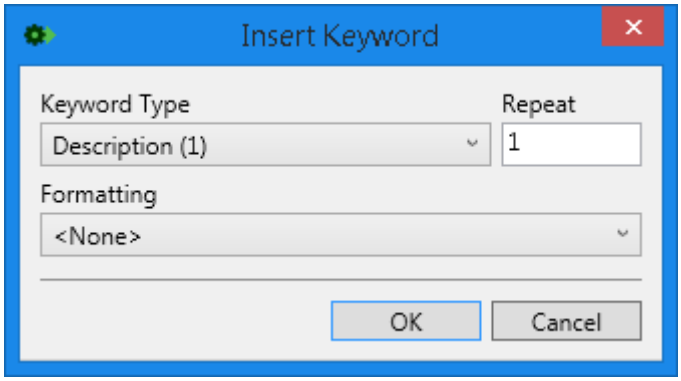
11. You can insert Keywords that are on the Document Type into the text field. To insert Keywords, click **Insert Keyword**. The **Insert Keyword** dialog is displayed.



12. In the **Keyword Type** drop-down list, select the desired Keyword Type to add. In the **Repeat** field, enter the value for the number of times the Keyword Type should be repeated. In the **Formatting** drop-down list, select the type of formatting to apply to the Keyword:
    - **<None>** - Apply no formatting to the Keywords.
    - **Capitalize** - Capitalize the first letter of the Keyword.
    - **Capitalize Words** - Capitalize the first letter of every word.
    - **Uppercase** - Capitalize every letter of the Keyword.
    - **Lowercase** - Do not capitalize any letters of the Keyword.
13. Click **Next**.

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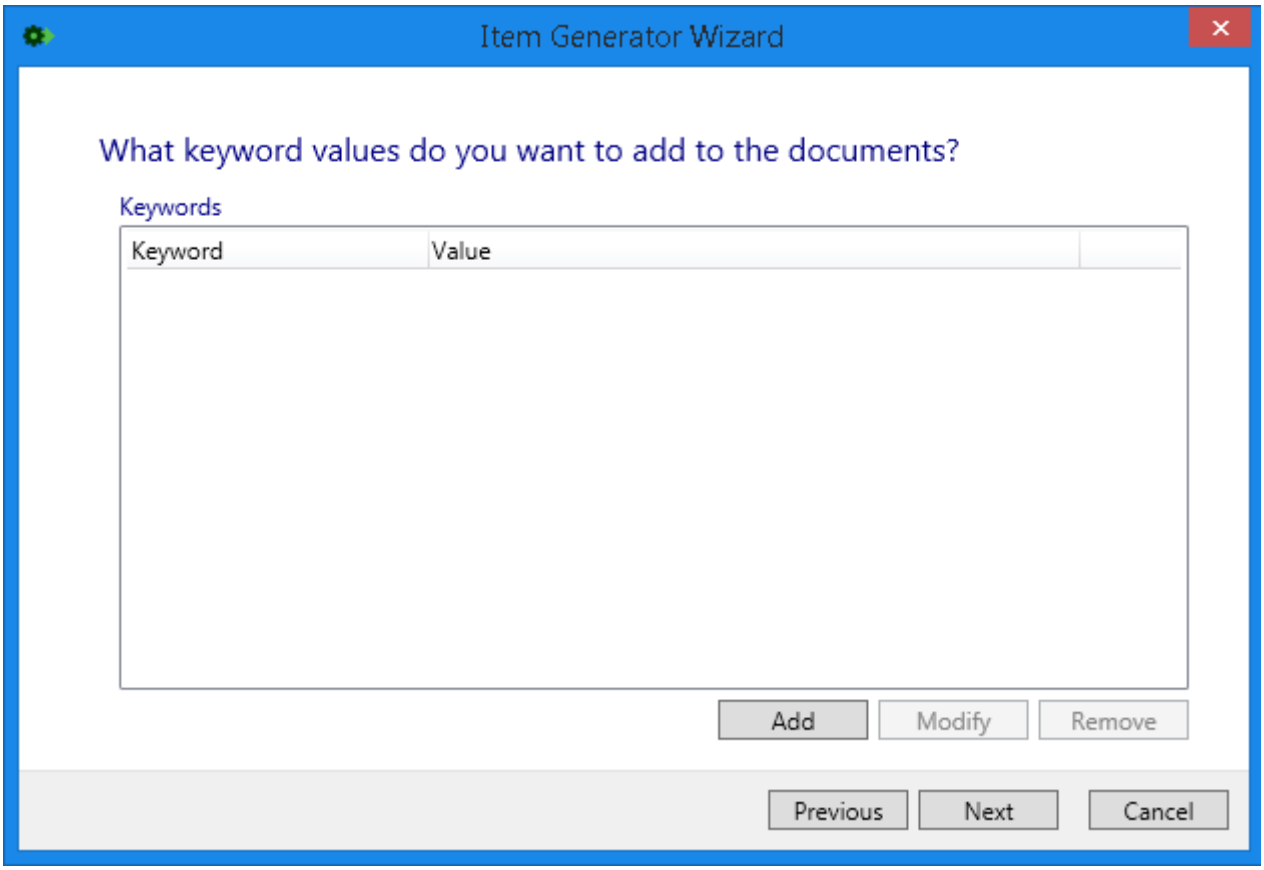

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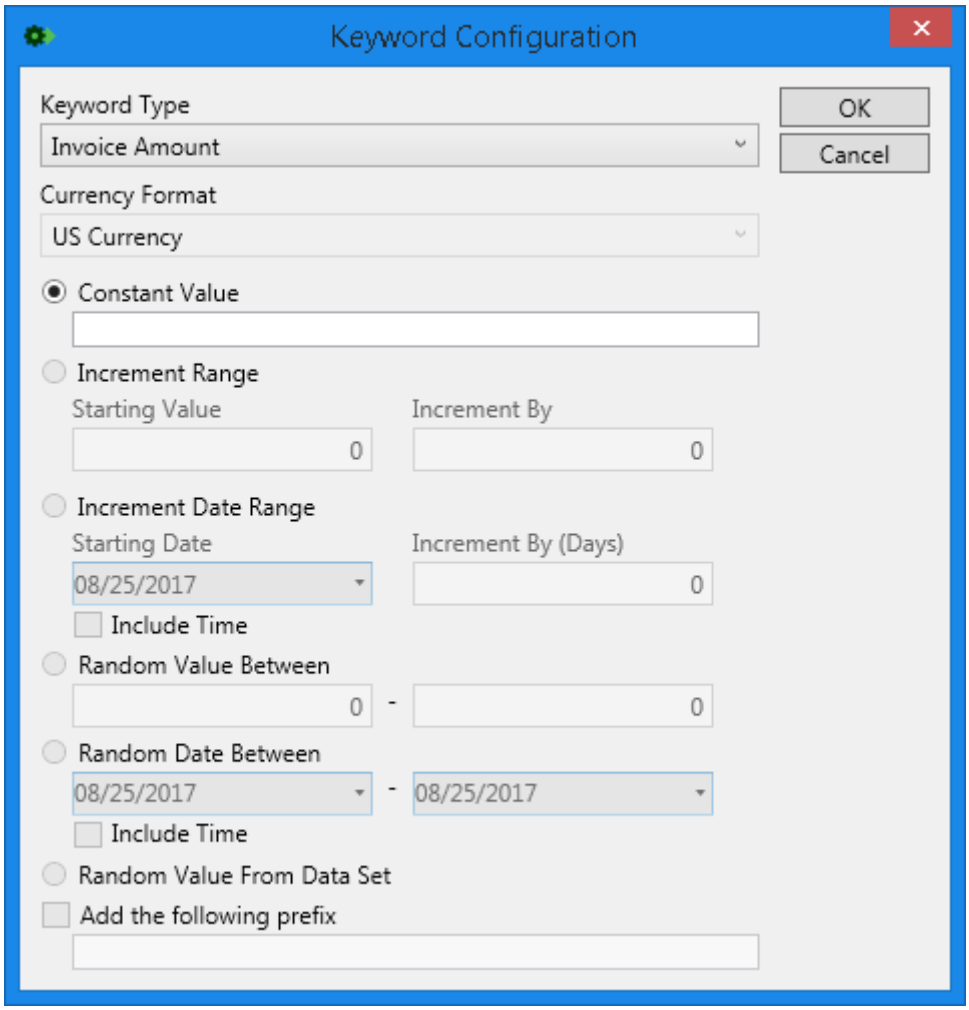
14. Click **Add**. The **Keyword Configuration** dialog box is displayed.



15. Select the **Keyword Type** you would like to map to a value.

Note: If the value configured for the Keyword Type exceeds the configured maximum length for the Keyword Type, the generated value will be truncated when the generator is executed.

Note: If the Keyword Type you selected is configured as a specific currency, you can specify the currency format in the **Currency Format** drop-down list.

16. Select the appropriate mapping option:

Constant Value	This option allows you to add a constant value that will be added to all generated documents for the selected Keyword Type.

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Increment Range	This option allows you to enter a **Starting Value** and a value to increment that number by in the **Increment By** field. Each generated document keyword value is incremented by the number specified. **Note:** If the Keyword Type is configured for masking, the value is limited to nine characters. **Note:** This option is not available for currency or date Keyword Types.
Increment Date Range	This option allows you to enter a **Starting Date** and a value to increment that date by in the **Increment By (Days)** field. Each generated Keyword value is incremented by the number of days specified.
Random Value Between	This option allows you to add randomly generated values to the Keyword Type selected for generated documents. Enter the range of values you want the randomly generated values to fall in the fields. **Note:** If the Keyword Type is configured for masking, the value is limited to nine characters. **Note:** This option is not available for currency or date Keyword Types.
Random Date Between	This option allows you to add a random date between the specified range. Select a start and end date for the date range. Select **Include Time** to include a time.
Random Value from Data Set	Select this option to add a random value from the Keyword's configured data set. **Note:** This option is only supported for Keywords with data sets configured.
Add the following prefix	If you want to add a prefix to the value you configured in one of the above options, select this check box and enter the value you want to use as a prefix. **Note:** Leading and trailing spaces are removed from the prefix when it is affixed to the keyword value. **Note:** This option is available only when an alphanumeric Keyword Type is selected.

17. Click **OK**.
18. Repeat the steps to add a Keyword Type for each Keyword Type and value combination you want to map.
19. Click **Next**.

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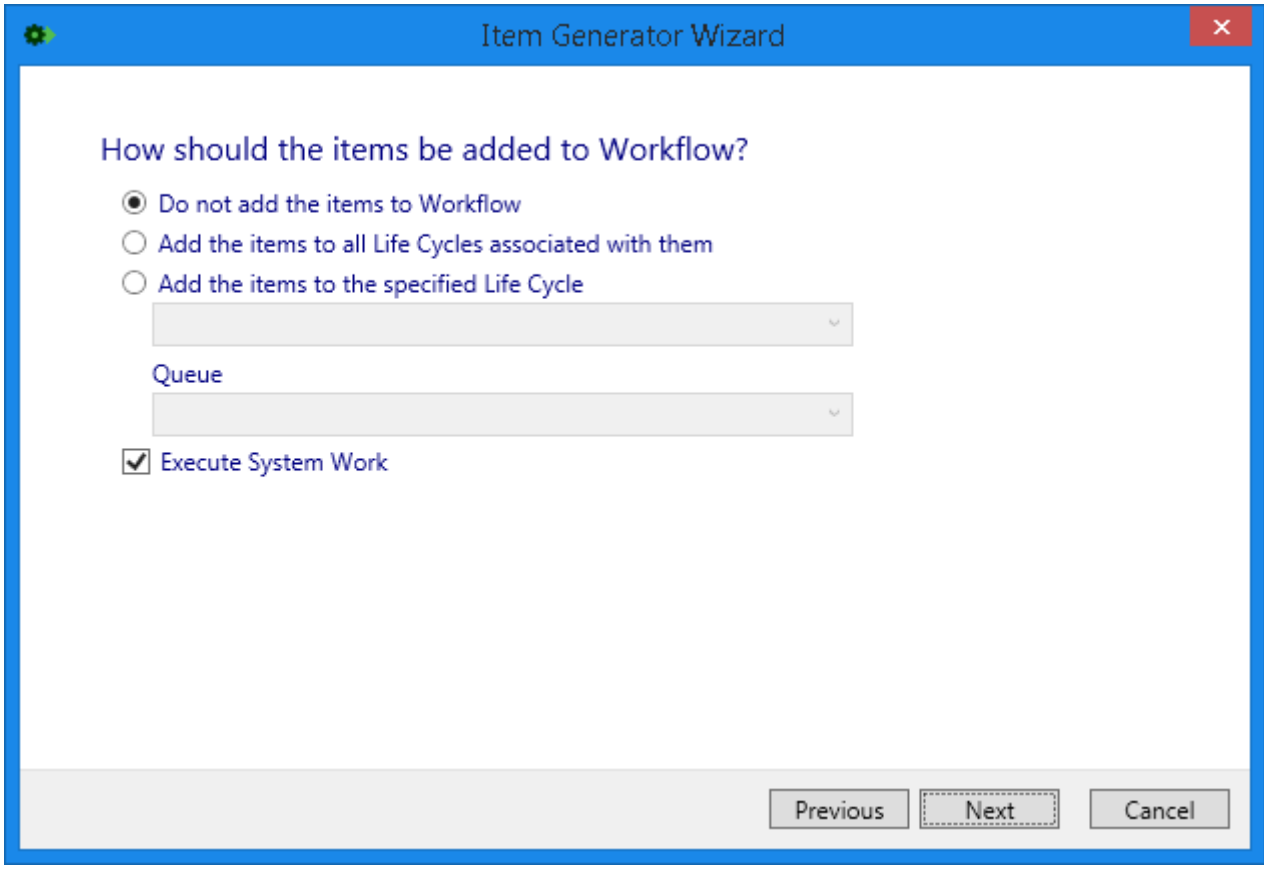
Note: The following screen is only available if you are licensed for Workflow.



20. You can determine whether the items that are generated are added to Workflow. The following options are available:

Do not add the items to Workflow	If you want to generate items, but you do not want to add them to Workflow life cycles, select this option.
Add the items to all Life Cycles associated with them	If you want generated items to be added to all life cycles that the Document Type is associated with, select this option.
Add the items to the specified Life Cycle	If you want to select a specific life cycle and queue to add the items to, select this option and select the appropriate life cycle from the first drop-down list and the **Queue** from the second drop-down list.
Execute System Work	If you want to execute system work on the items, select this option.

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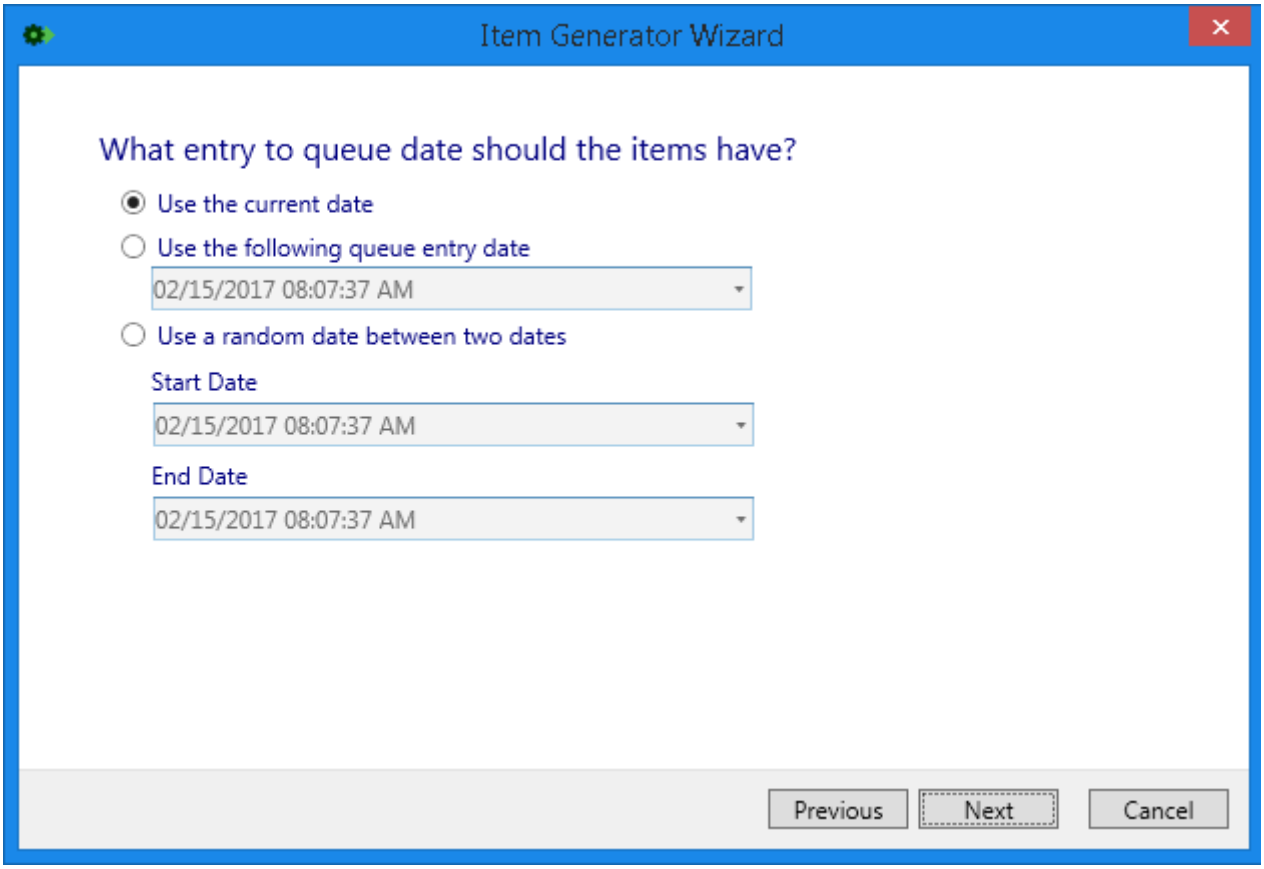
21. Click **Next**.



22. Determine how the items should be assigned a queue entry date. The following options are available:

Option	Description
Use the current date	Uses the current date as the entry to queue date.
Use the following queue entry date	Select a specific date to use as the entry to queue date.
Use a random date between two dates	Uses a random date in a specified date range as the entry to queue date. Select a **Start Date** and **End Date** to specify the date range that should be used. The **End Date** must be after the **Start Date**.

23. Click **Next**.
24. Click **Finish**.

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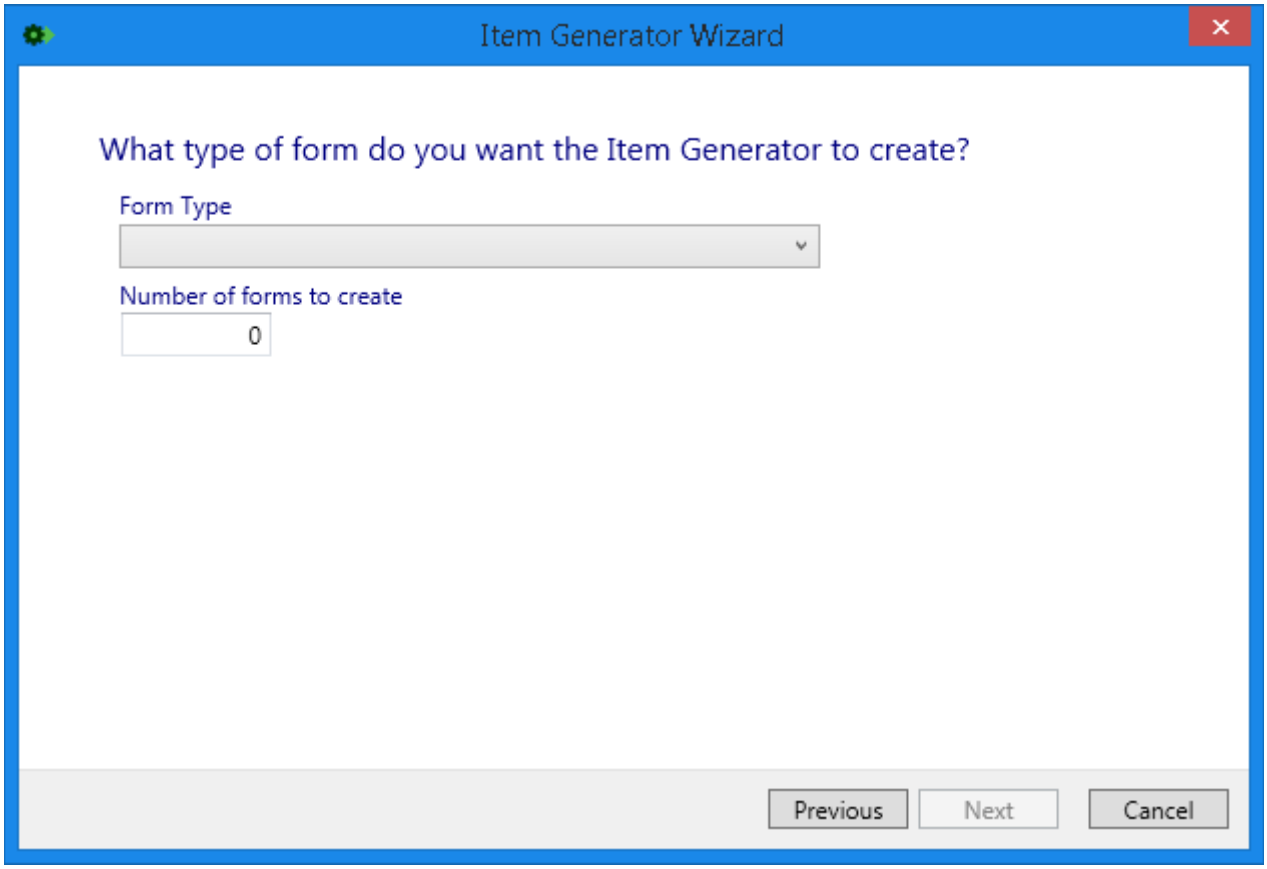
Generating Forms

1. If you want to generate Unity Forms or Image Forms, click **Forms**.



2. Select the Unity Form or Image Form you want to generate from the **Form Type** drop-down list.
3. Enter the number of forms you want to generate in the **Number of forms to create** field.
4. Click **Next**.

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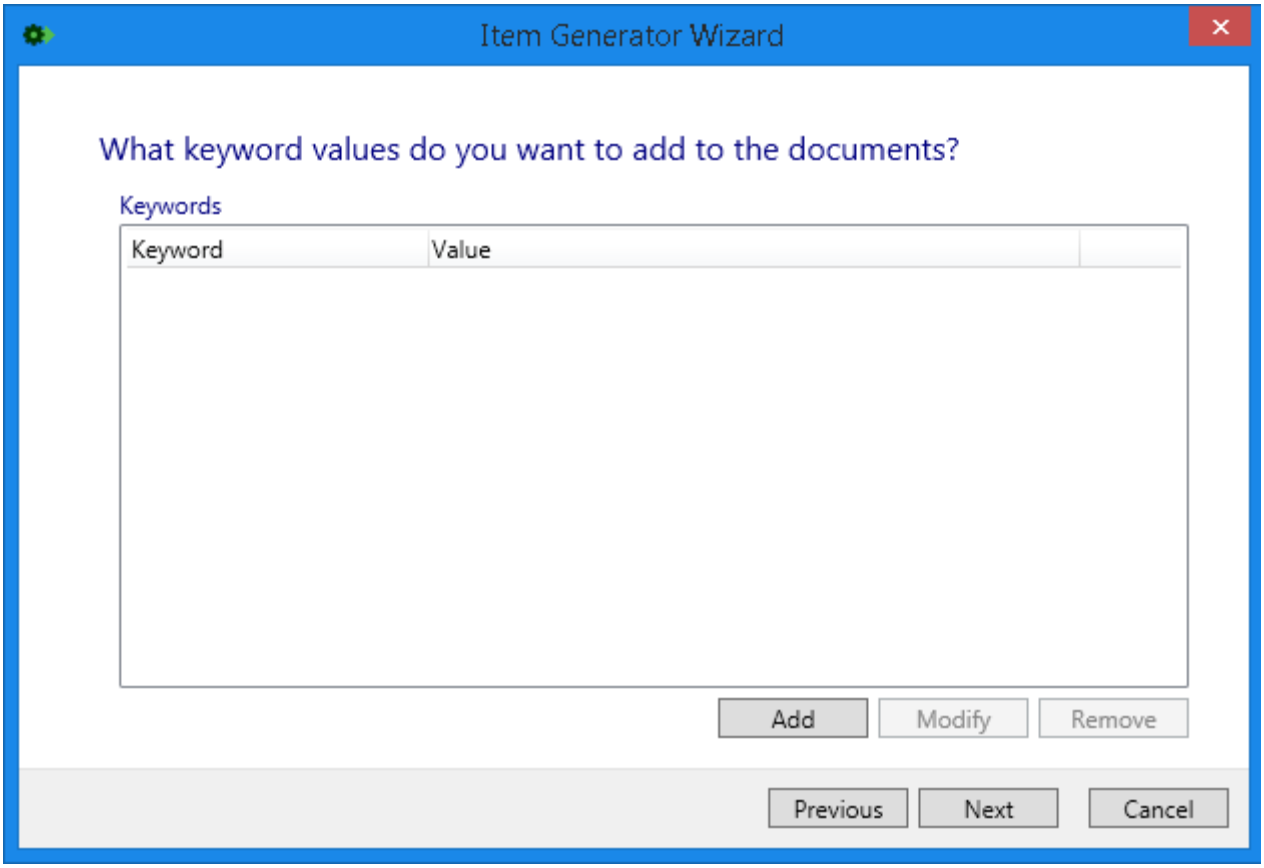

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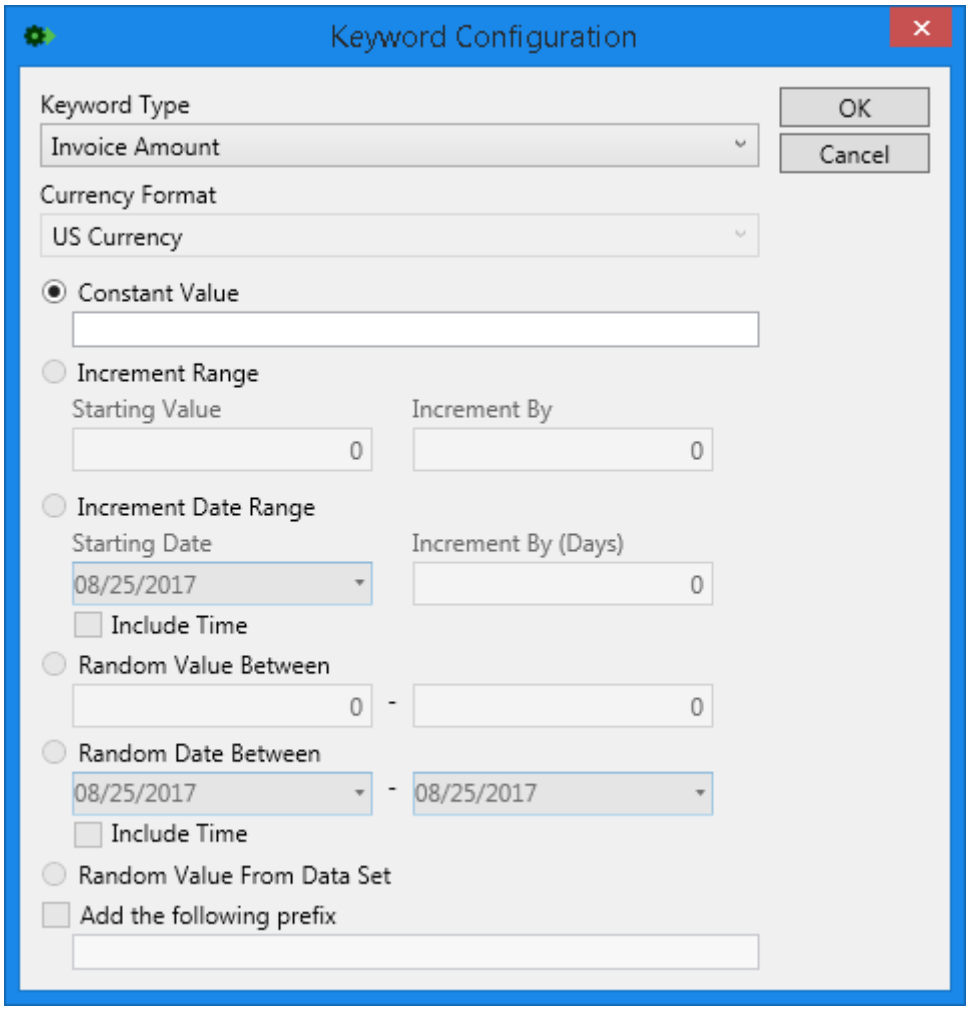
5. Click **Add**. The **Keyword Configuration** dialog box is displayed.



6. Select the **Keyword Type** you would like to map to a value.

Note: If the value configured for the Keyword Type exceeds the configured maximum length for the Keyword Type, the generated value will be truncated when the generator is executed.

Note: If the Keyword Type you selected is configured as a specific currency, you can specify the currency format in the **Currency Format** drop-down list.

7. Select the appropriate mapping option:

Constant Value	This option allows you to add a constant value that will be added to all generated documents for the selected Keyword Type.

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Increment Range	This option allows you to enter a **Starting Value** and a value to increment that number by in the **Increment By** field. Each generated document keyword value is incremented by the number specified. **Note:** If the Keyword Type is configured for masking, the value is limited to nine characters. **Note:** This option is not available for currency or date Keyword Types.
Increment Date Range	This option allows you to enter a **Starting Date** and a value to increment that date by in the **Increment By (Days)** field. Each generated Keyword value is incremented by the number of days specified.
Random Value Between	This option allows you to add randomly generated values to the Keyword Type selected for generated documents. Enter the range of values you want the randomly generated values to fall in the fields. **Note:** If the Keyword Type is configured for masking, the value is limited to nine characters. **Note:** This option is not available for currency or date Keyword Types.
Random Date Between	This option allows you to add a random date between the specified range. Select a start and end date for the date range. Select **Include Time** to include a time.
Random Value from Data Set	Select this option to add a random value from the Keyword's configured data set. **Note:** This option is only supported for Keywords with data sets configured.
Add the following prefix	If you want to add a prefix to the value you configured in one of the above options, select this check box and enter the value you want to use as a prefix. **Note:** Leading and trailing spaces are removed from the prefix when it is affixed to the keyword value. **Note:** This option is available only when an alphanumeric Keyword Type is selected.

8. Click **OK**.
9. Repeat the steps to add a Keyword Type for each Keyword Type and value combination you want to map.

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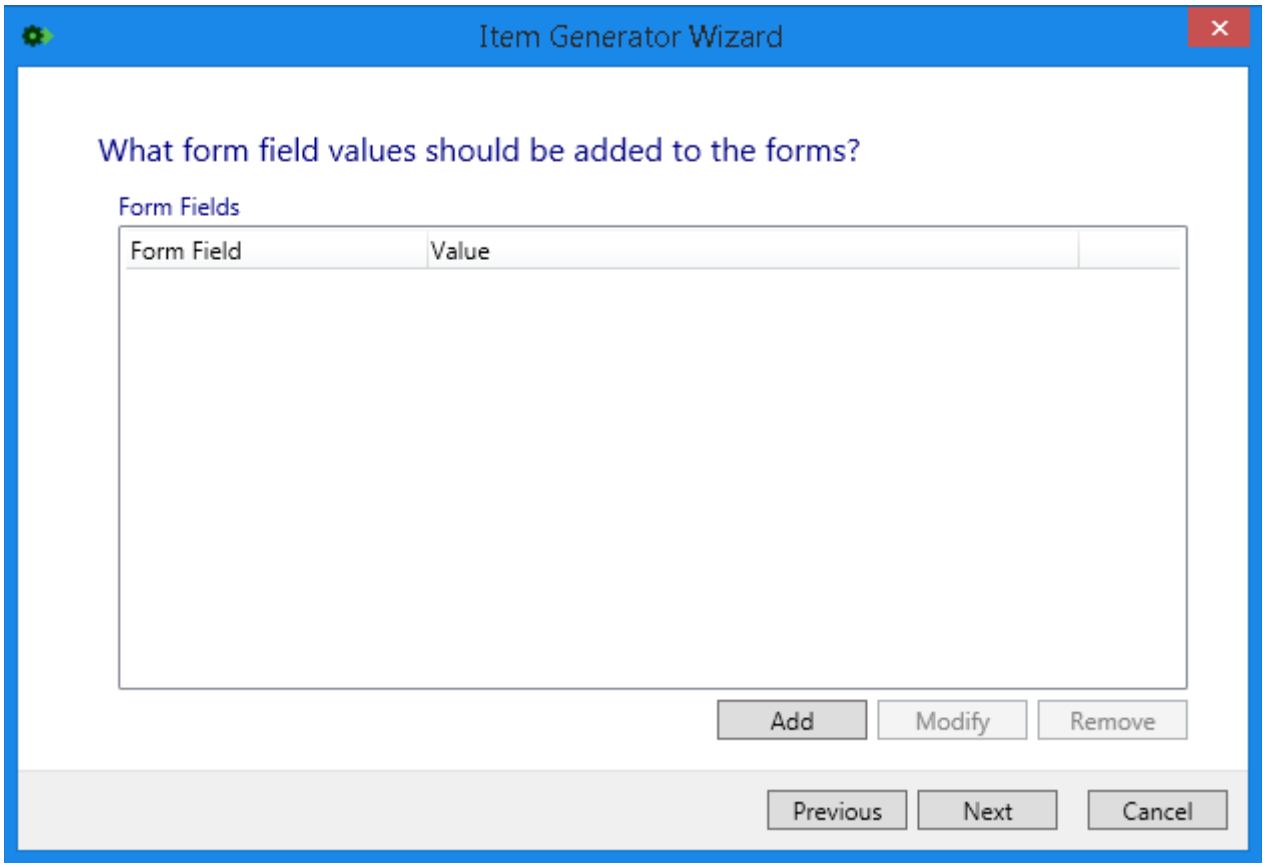
10. Click **Next**.



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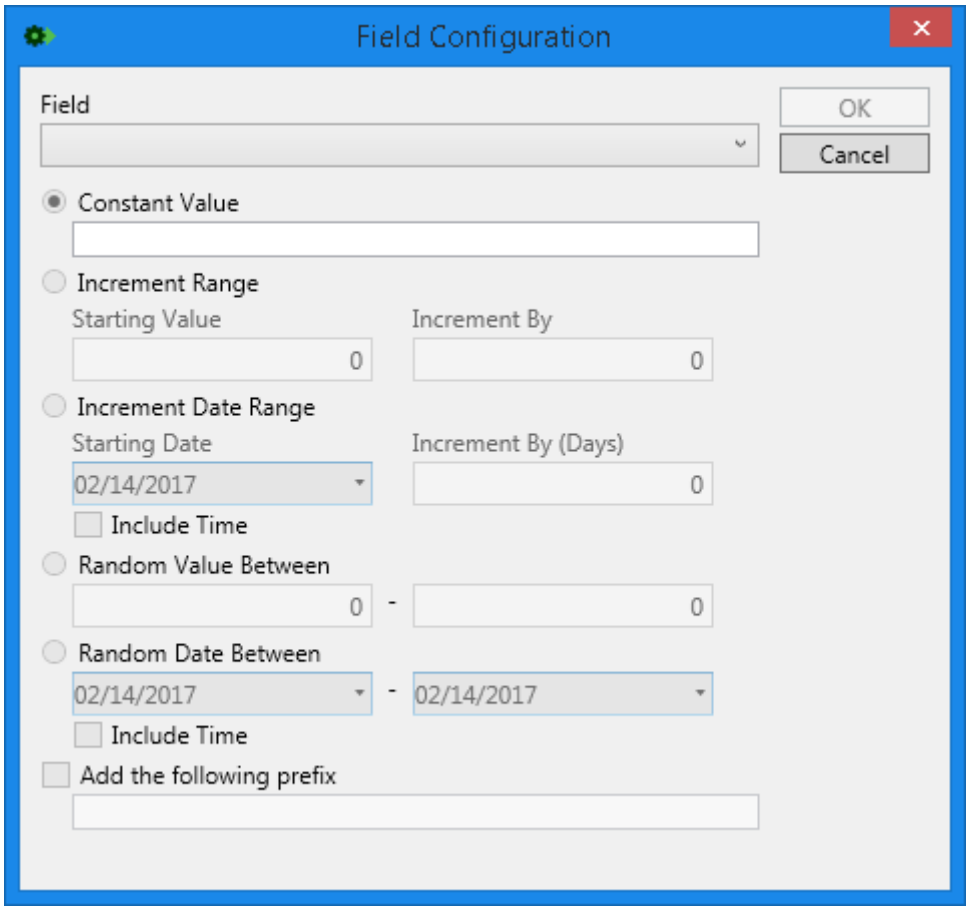
11. Click **Add**.



12. Select the **Field** from the drop-down list.

Note: Only fields that are not associated with a Keyword Type are available for selection.

Note: CAPTCHA fields are not available to be added to item generators.

13. Select the appropriate mapping option:

Constant Value	This option allows you to add a constant value that will be added to all generated forms for the selected form field.
Increment Range	This option allows you to enter a **Starting Value** and a value to increment that number by in the **Increment By** field. Each generated form field value is incremented by the number specified.
Increment Date Range	This option allows you to enter a **Starting Date** and a value to increment that date by in the **Increment By (Days)** field. Each generated field value is incremented by the number of days specified.

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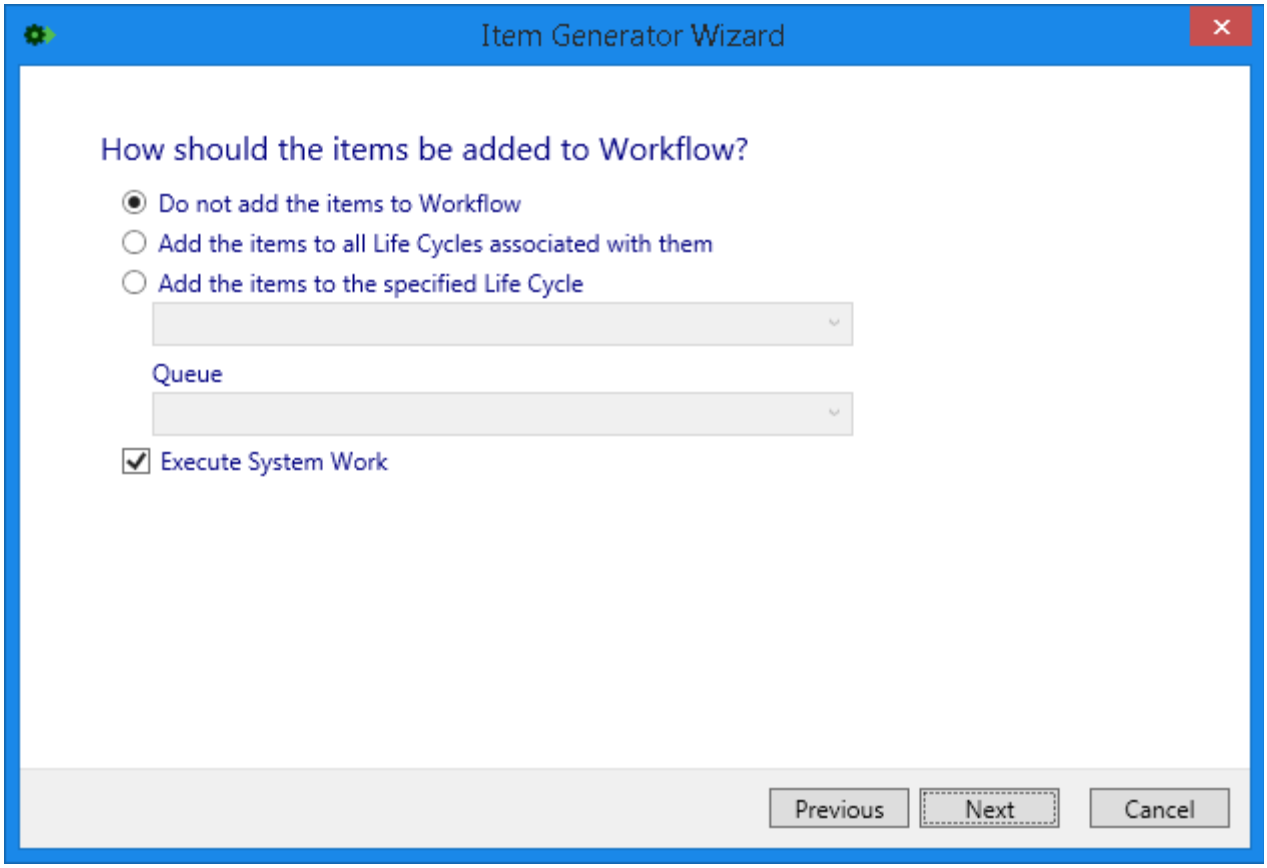
Random Value Between	This option allows you to add randomly generated value to the field selected for generated forms. Enter the range of values you want the randomly generated values to fall in the fields.
Random Date Between	This option allows you to add a random date between the specified range. Select a start and end date for the date range. Select **Include Time** to include a time.
Add the following prefix	If you want to add a prefix to the value you configured in one of the above options. Select this check box and enter the value you want to use as a prefix.

14. Click **OK**.
15. Repeat the steps to add a field for each field and value combination you want to map.
16. Click **Next**.

Note: The following screen is only available if you are licensed for Workflow.



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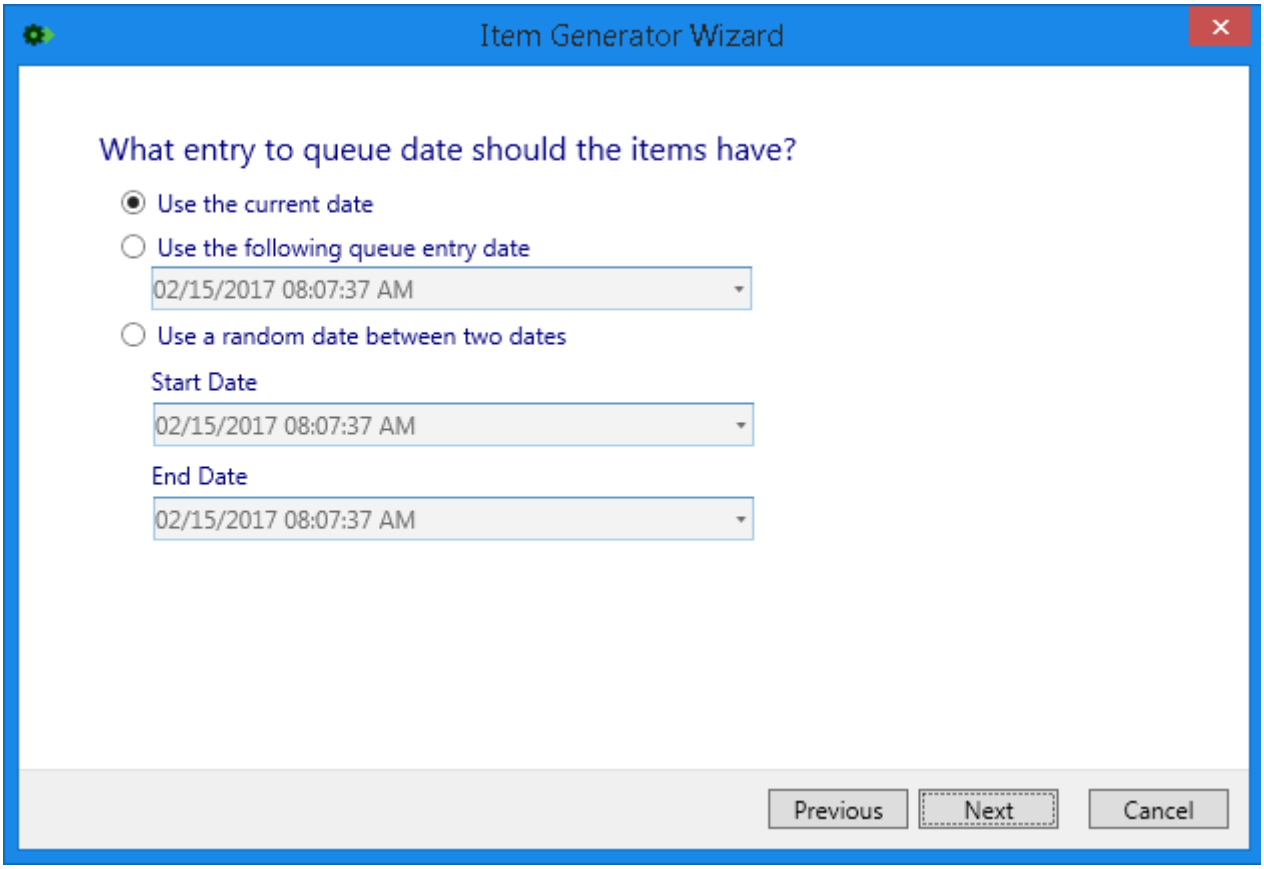
17. You can determine whether the items that are generated are added to Workflow. The following options are available:

Do not add the items to Workflow	If you want to generate items, but you do not want to add them to Workflow life cycles, select this option.
Add the items to all Life Cycles associated with them	If you want generated items to be added to all life cycles that the Document Type is associated with, select this option.
Add the items to the specified Life Cycle	If you want to select a specific life cycle and queue to add the items to, select this option and select the appropriate life cycle from the first drop-down list and the **Queue** from the second drop-down list.
Execute System Work	If you want to execute system work on the items, select this option.

18. Click **Next**.



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19. Determine how the items should be assigned a queue entry date. The following options are available:

Option	Description
Use the current date	Uses the current date as the entry to queue date.
Use the following queue entry date	Select a specific date to use as the entry to queue date.
Use a random date between two dates	Uses a random date in a specified date range as the entry to queue date. Select a **Start Date** and **End Date** to specify the date range that should be used. The **End Date** must be after the **Start Date**.

20. Click **Next**.
21. Click **Finish**.

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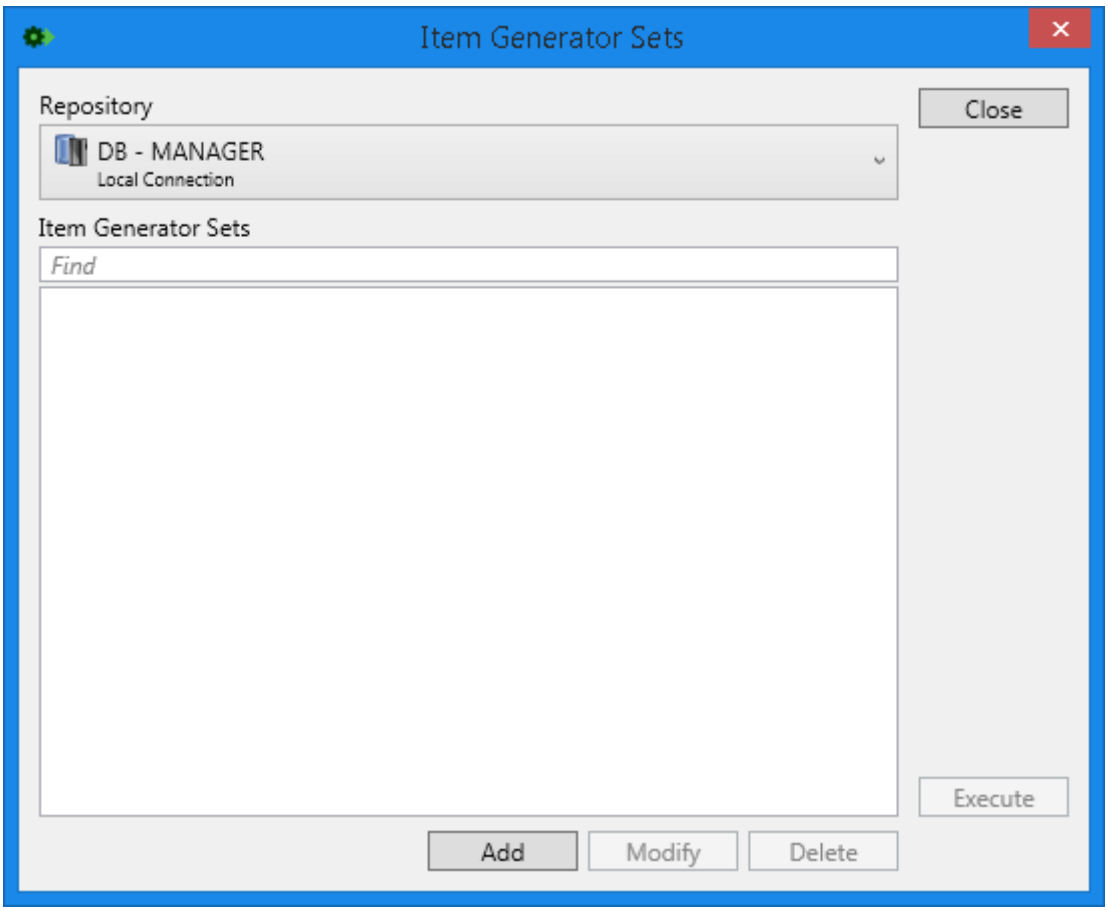
Creating Generator Sets

Generators can be grouped together in generator sets. Generator sets allow you to execute multiple generators at one time. To create a generator set:

1. In the **Home** ribbon, within the **Item Generation** ribbon group, click **Item Generator Sets**.



2. Select the **Repository** from the drop-down list that contains the generators for which you want to create a generator set.

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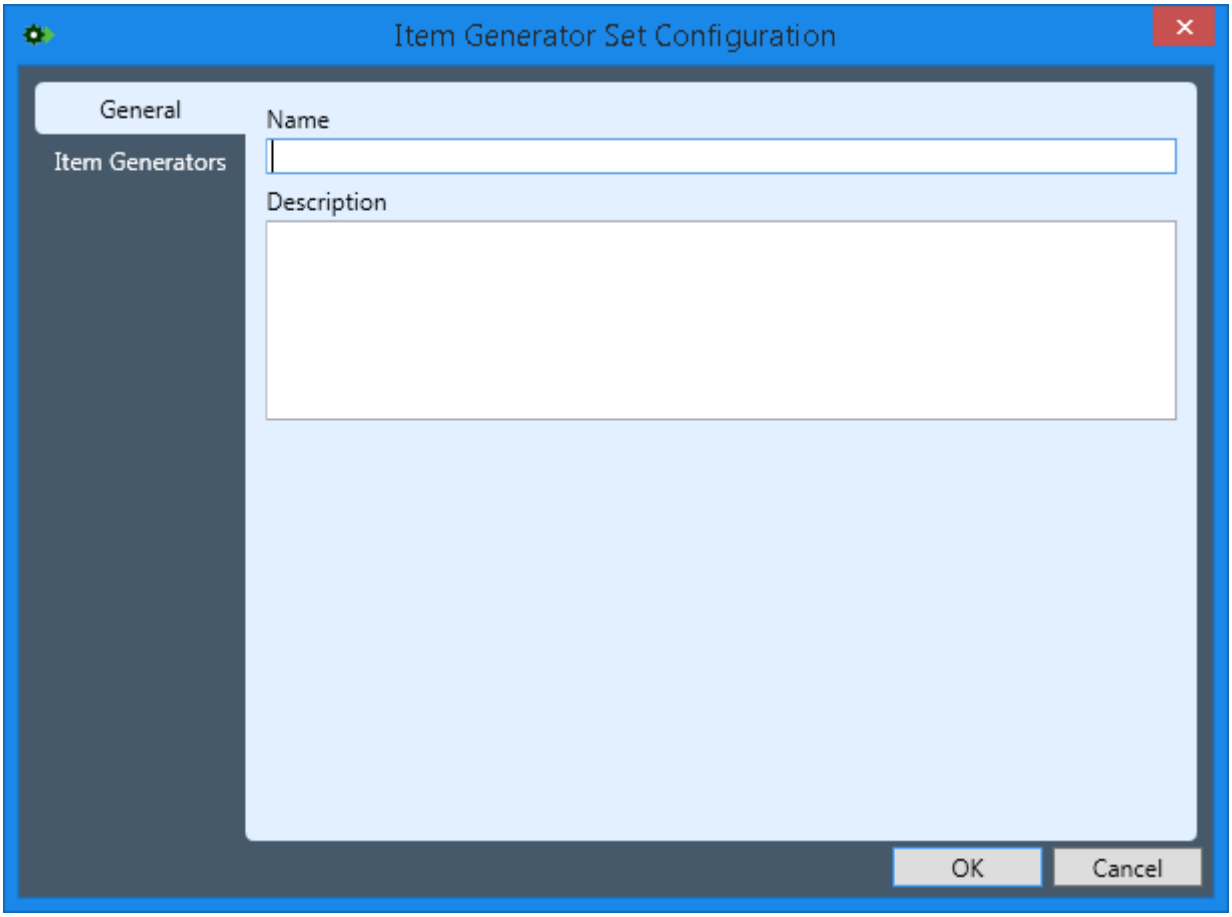
3. Click **Add**.



4. On the **General** tab, enter a **Name** and **Description** for the generator set.

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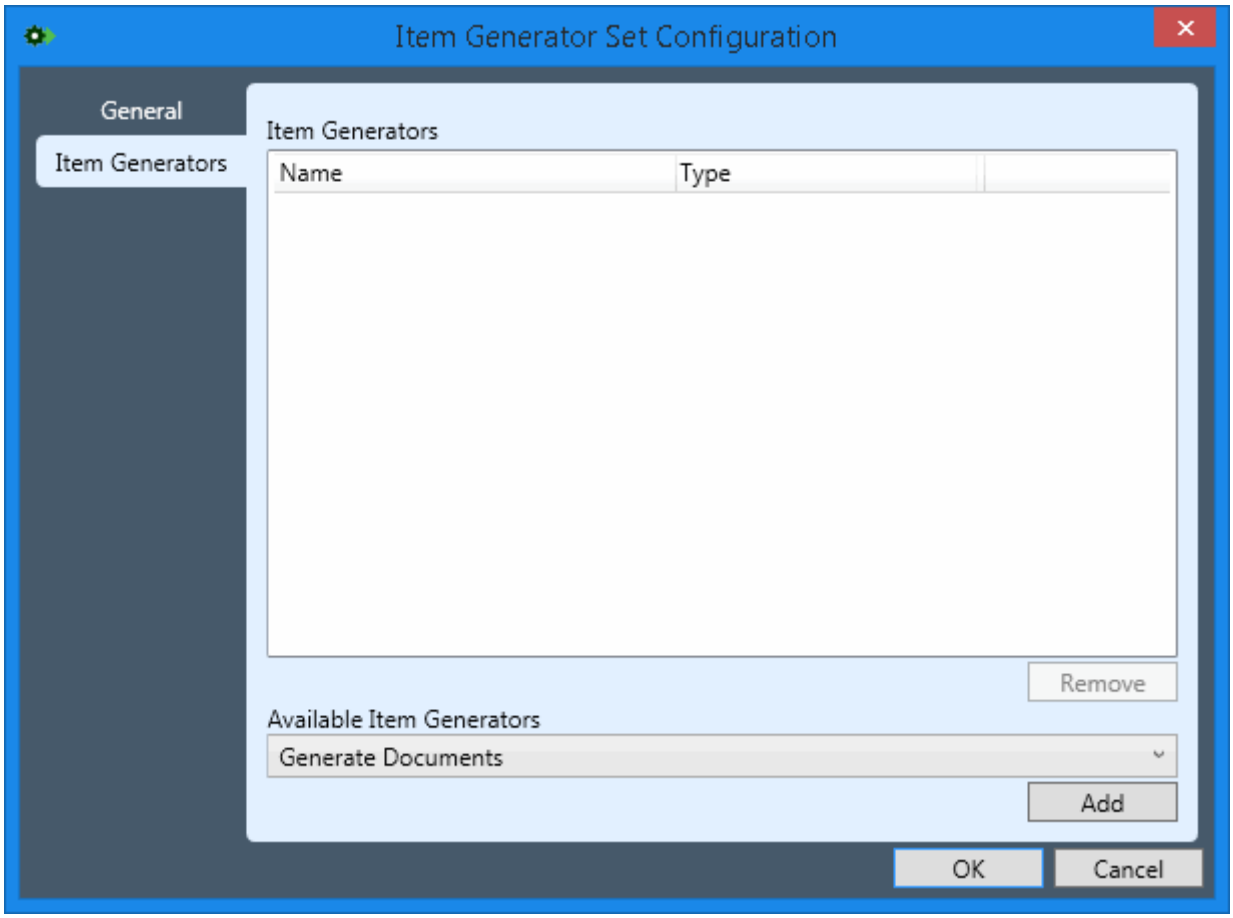
5. Select the **Item Generators** tab.



6. From the **Available Item Generators** drop-down list, select a generator that you want to include in the set.
7. Click **Add**.
8. Repeat steps 6 and 7 until all the generators you want to include in the set are added.
9. Click **OK**.

You can locate a specific, existing generator set by entering text that will identify the generator set in the **Find** field. The generator sets displayed will be narrowed down to the generator sets that contain the characters entered.

Note: You can modify an existing item generator set by selecting it and clicking **Modify**. To delete an item generator set, select it and click **Delete**. Item generator sets associated with batches cannot be deleted.

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Executing Generators and Generator Sets

You can execute generators and generator sets by selecting what you want to generate and clicking the **Execute** button in either the **Item Generators** dialog box or the **Item Generator Sets** dialog box. Upon executing a generator or generator set, the documents generated will be added to the appropriate life cycle as configured during generator configuration.

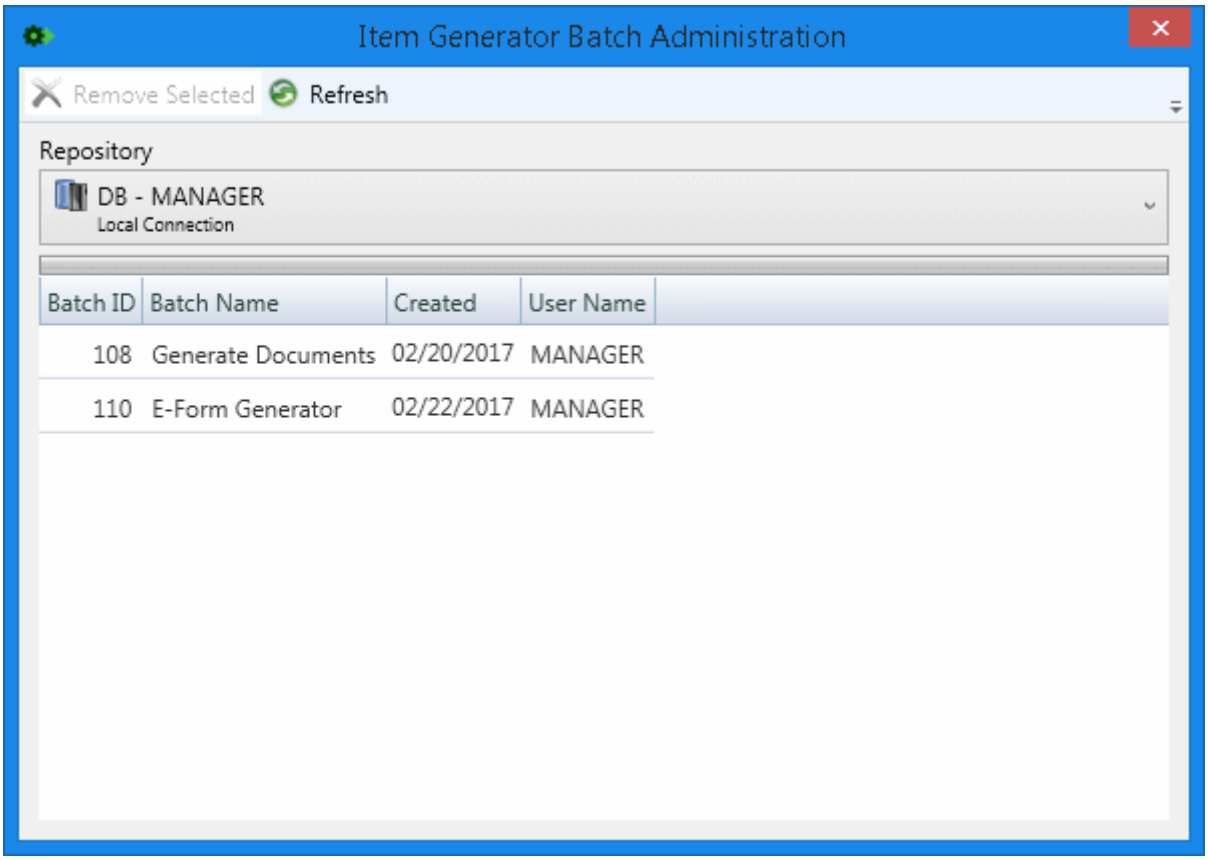
If the execution of a generator or generator set is canceled, some items may have been created in OnBase before the cancellation.

Administrating Generator Batches

You can view the list of generated batches and remove batches that are no longer needed. When batches are removed, the generated documents and objects are also removed from OnBase.

To remove a batch:

1. In the **Workflow** ribbon, within the **Item Generation** ribbon group, click **Item Generator Batch Administration**.



2. Select the **Repository** from the drop-down list that contains the generators for which you want to create a generator set.
3. Select the batch you want to remove.

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4. Click **Remove Selected**.

To see new batches that have been generated, click **Refresh**.

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OnBase®
Foundation EP5

Unity Forms

User Guide

Foundation EP5

Creating a Form

To create a Unity Form in the Unity client:

1. Click the **Forms** button in the **Create** group on the **Home** ribbon.
2. If you want to narrow the forms displayed for selection, in the **Find** field, enter text that is contained in the name of the form you want to create.
3. You can sort forms by the Document Type Group they are associated with or not sort them and list them alphabetically by clicking the **Group by Document Type Group** button to toggle the display.

4. Click on the form you want to create in the **Forms** pane. The form selected will be highlighted.
5. Enter the correct values in the form.
6. On the **Unity Form** tab, click **Submit**. Alternately, you can press **Enter** to submit a form.

After submitting a form, it is available for retrieval.

Note: When you create a new form in a revisable Document Type, a new form is created, regardless of whether or not keyword values of the new form match the keyword values of an existing form.

Sending Links to Forms for Creation

If your system is configured to do so, links to forms can be sent via email from the Unity Client that will initiate form creation. To send a link to a form for creation:

1. In the **Home** ribbon, within the **Create** ribbon group, click **Forms**.
2. Right-click on the form in the **Forms** pane and select **Mail Recipient (as Link)**. An email message will open with a link to the form.
3. Send the email to the proper recipient.

Validating Data in Forms

Data is validated in forms to ensure that the data entered in the form is in the expected format.

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The value of a field is validated upon leaving it after entering data by pressing the **Tab** key or by clicking in a new field. When a field's value is not valid, a red border is displayed around the field. If you click in an invalid field, information about why the value in the field is not valid appears next to the field.

Upon clicking **Submit** on a form, all the values in all the fields on the form are validated. If any field contains an invalid value, a notification bar appears directly above the form that displays the name of the invalid field or fields and the reason why the value in the field or fields is invalid next to the field name. The form cannot be submitted until the values in the invalid fields are no longer invalid.

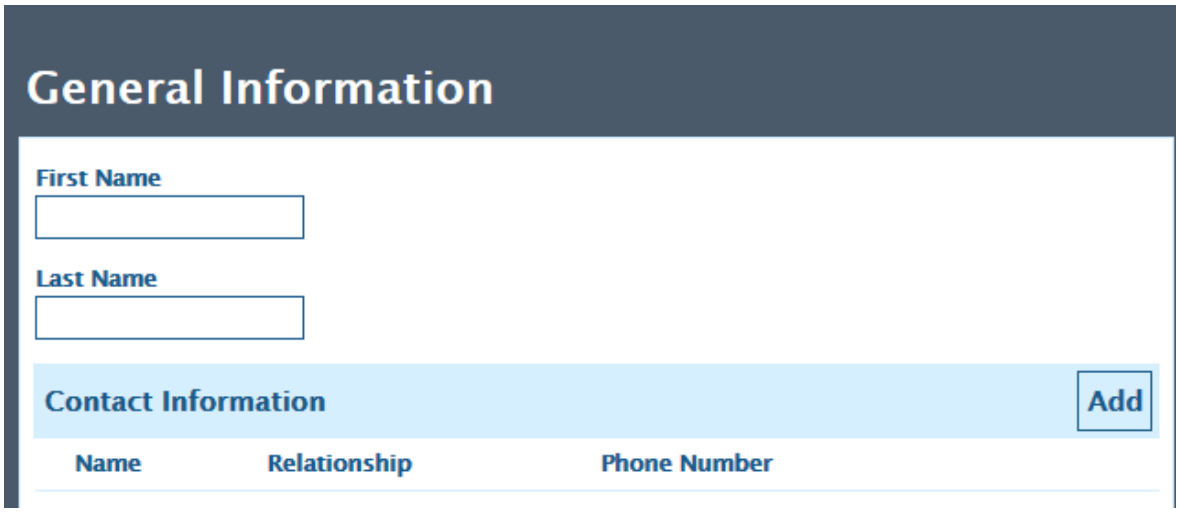
Tip: You can click on the name of an invalid field in the notification bar to navigate to that field and to display a message explaining the reason why the field is invalid.

Using Repeating Sections

Repeating sections allow you to easily configure Multi-Instance Keyword Type Groups on a form. Repeating sections also allow you to configure non-keyword fields that you would like to have multiple instances of on a form. Repeating sections allow you to define what fields can be repeated without requiring you to define the number of instances allowed during form design. You can create fields on the fly at run time. This is accomplished by simply creating a repeating section or table and placing controls that you want to repeat within it.

Note: If the repeating section on your form is not configured with a Multi-Instance Keyword Type Group, the data entered in the fields in the repeating section is saved to the **Disk Group (XML)** Document Type.

In the following example, upon entering data in the first set of fields, you can click **Add** to create another set of fields for data entry.



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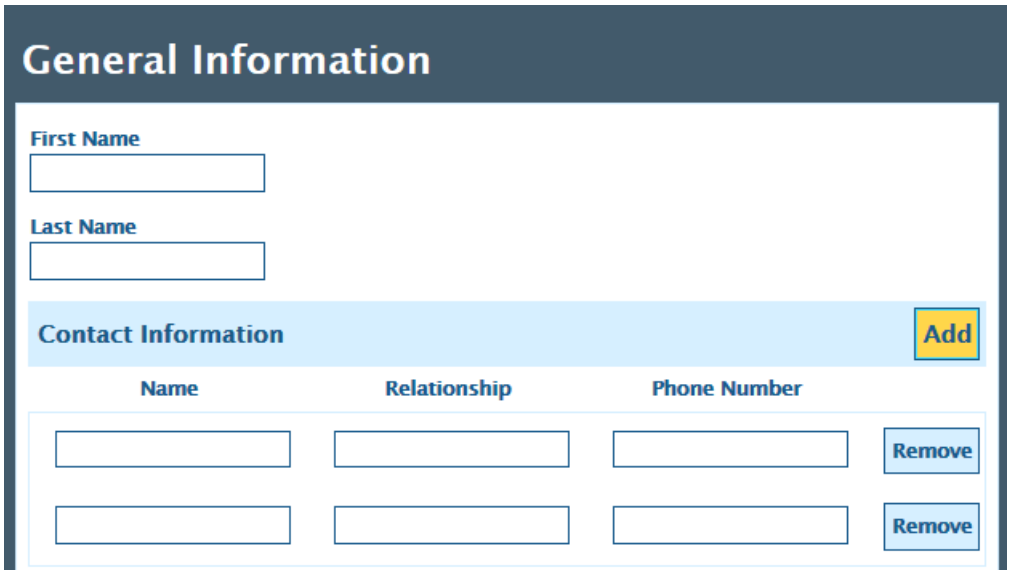
This form allows effortless field creation at the time the user needs additional fields. In the next screen, we can see that another row was added to enter an additional item.



To create a set of values for a Multi-Instance Keyword Type Group:

1. In the form, click **Add**.
2. Fields for the keywords within a Multiple Instance Keyword Type Group are displayed for input.
3. Enter the appropriate values for the keywords.
4. Repeat steps 1 to 3 for each instance of a Multi-Instance Keyword Type Group you want to add to the form.
5. Save or submit the form.

Note: You can remove an instance by clicking the corresponding **Remove** button.

Using Masking

When a field has a required mask, upon entering the field, the mask is displayed.

Using Forms with Multiple Pages

When a form has multiple pages, tabs are available at the top of the form. To access a different page, click on the corresponding tab.

You can also navigate the pages of a form using the TAB key. Press the TAB key until the desired page is highlighted, then press ENTER to select the page.

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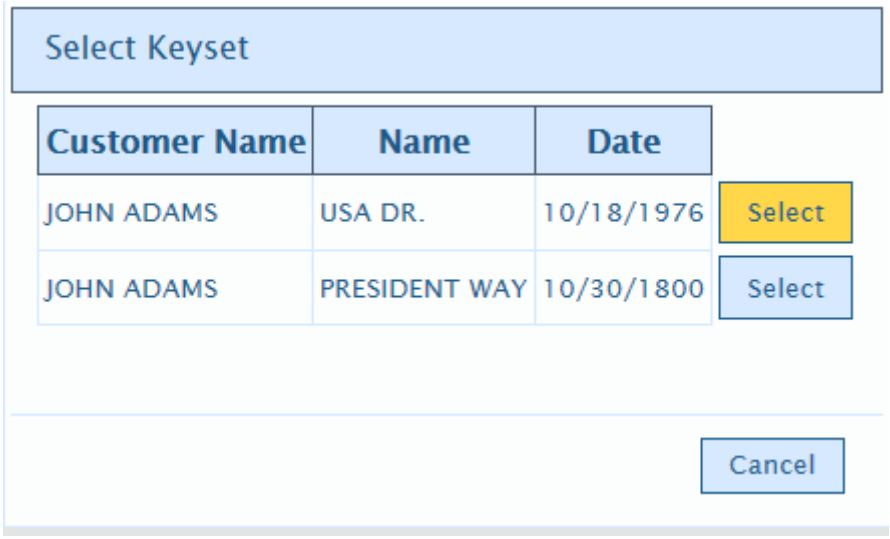
Using AutoFill Keyword Sets on Forms

When a form is configured with an AutoFill Keyword Set, a primary value can be entered on a form and the secondary values will be populated. Enter a primary keyword value and press **Tab** on the keyboard to expand the AutoFill Keyword Set. Alternately, you can press **Enter** to expand an AutoFill Keyword Set after entering a primary keyword value. Upon pressing **Enter** a second time after expanding the AutoFill Keyword Set, the form will submit. If a primary value has more than one set of secondary values associated with it, the values will be displayed for selection. The following is an example of this:



Click **Select** next to the values you want to use for the form.

Keyword Types belonging to an AutoFill Keyword Set that are assigned to the Document Type the form belongs to will be expanded regardless of whether the Keyword Types are on the form itself. The expanded Keyword Type values will be displayed in the keyword panel.

When using Single Instance Keyword Type Groups and standard Keyword Types together, values will be expanded in both the Keyword Type Group and across standard Keyword Types. If the primary keyword is in a Single Instance Keyword Type Group or standard Keyword Type, values in Multiple Instance Keyword Type Groups are not expanded.

When a primary Keyword Type is in a Multiple Instance Keyword Type Group, only the Keyword Types in the AutoFill Keyword Type Set that are a part of the Multiple Instance Keyword Type Group are expanded.

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If using Unity Forms in conjunction with the Unity Briefcase, and the Unity Briefcase Field Application is configured with an AutoFill Keyword Set, the AutoFill Keyword Set will be available on the form. AutoFill Keyword Sets that are not included in the Field Application are not available.

Caution: Unity Forms only supports multiple AutoFill Keyword Sets when using the form's user interface. Multiple AutoFill Keyword Sets are not supported in Unity Forms during re-indexing or when editing keyword values in a keyword panel. Multiple AutoFill Keyword Sets must be expanded within the form.

Using Lookups

When a form is configured with a lookup button, you can enter values into fields that have been associated with a lookup button and find an AutoFill Keywords Set that contains the value(s) entered. For example, if you need to find an account number, but you only have a person's name and address, you can enter the information you have in the form when configured to do so. Then, click **Lookup** and find the account number you need to populate in the form. To use a lookup:

1. Enter values in the fields that will help identify the AutoFill Keyword Set you are trying to locate. Depending on the configuration of the form, not all fields on the form will perform the lookup function.
2. Click **Lookup**. If only one value set exists for the information entered, the form fields associated with the AutoFill Keyword Set are populated.

   If multiple value sets exist for the information entered, the **Select Reverse Lookup Match** window is displayed.
3. Click **Select** next to the values you want to use to populate the form. The fields that are configured on the form that are associated with the selected AutoFill Keyword Set are populated.

If using Unity Forms in conjunction with the Unity Briefcase, **Lookup** buttons are disabled when forms are opened in the Briefcase application.

Using Auto Number Keyword Types

If a Unity Form has an auto numbering Keyword Type on it and the Keyword Type is a standard Keyword Type, the value of the Keyword Type will display the auto incremented value upon loading the form in the viewer.

If the Keyword Type is a part of a Multi-Instance Keyword Type Group, the value will increment upon submitting the form.

If using Unity Forms in conjunction with the Unity Briefcase, auto numbered keyword values will not be generated while forms are offline. Existing auto numbered keyword values are displayed on forms when viewing forms offline.

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Required Fields

When a field is required, an asterisk is displayed beside the field. When an asterisk is displayed, a value must be entered in the field before you can successfully submit the form.

Note: If the field that is required is read-only, the form will save if there isn't a value in the read-only, required field.

Using Date Fields

When a field is associated with date-formatted data, clicking inside of the field will display the following date selection control:

The arrow button at the top allows you to navigate to a different month. The drop-down list allows you to select the relevant year. Click on the date to select it.

Note: If you are in a locale that uses a non-Gregorian calendar, the calendar control is not displayed. Instead, a masked field is displayed, allowing you enter the date in the proper format. Leading zeros must be entered for days and months.

Using Date & Time Fields

When a field is associated with date/time-formatted data, clicking inside of the field will display the following date/time masked control:

Enter the date and time within the formatted field, the date followed by the time.

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Using Drop-Down Lists

Some fields in a form are configured to use Data Sets. You can use the drop-down list next to these fields to select a value. In addition, you can type values into a field and all values in the Data Set that match the currently entered characters will display for selection.

Using Radio Button Groups

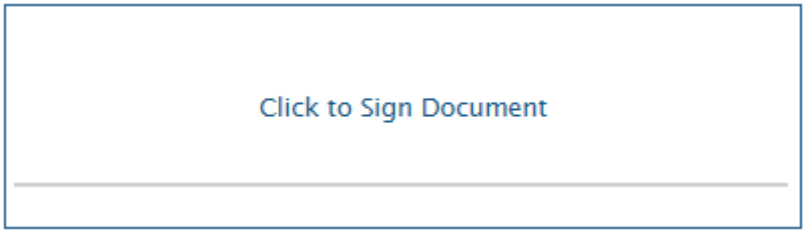
Some fields in a form are configured to use a Radio Button Group. You can select the radio button that corresponds to the appropriate value.

Note: If the form functionality depends on a selected radio button, upon radio button selection the form will reflect this functionality.

Using Signature Fields

When a form has signature fields, you can sign in the field using your mouse. In addition, if you are using a touchpad-enabled device, you can use a stylus to sign the form. To sign:

1. Click on the signature control. It will say **Click to Sign Document**.



2. A signature field will display.

3. Sign in the designated signature area.
4. Click **Apply Signature**.

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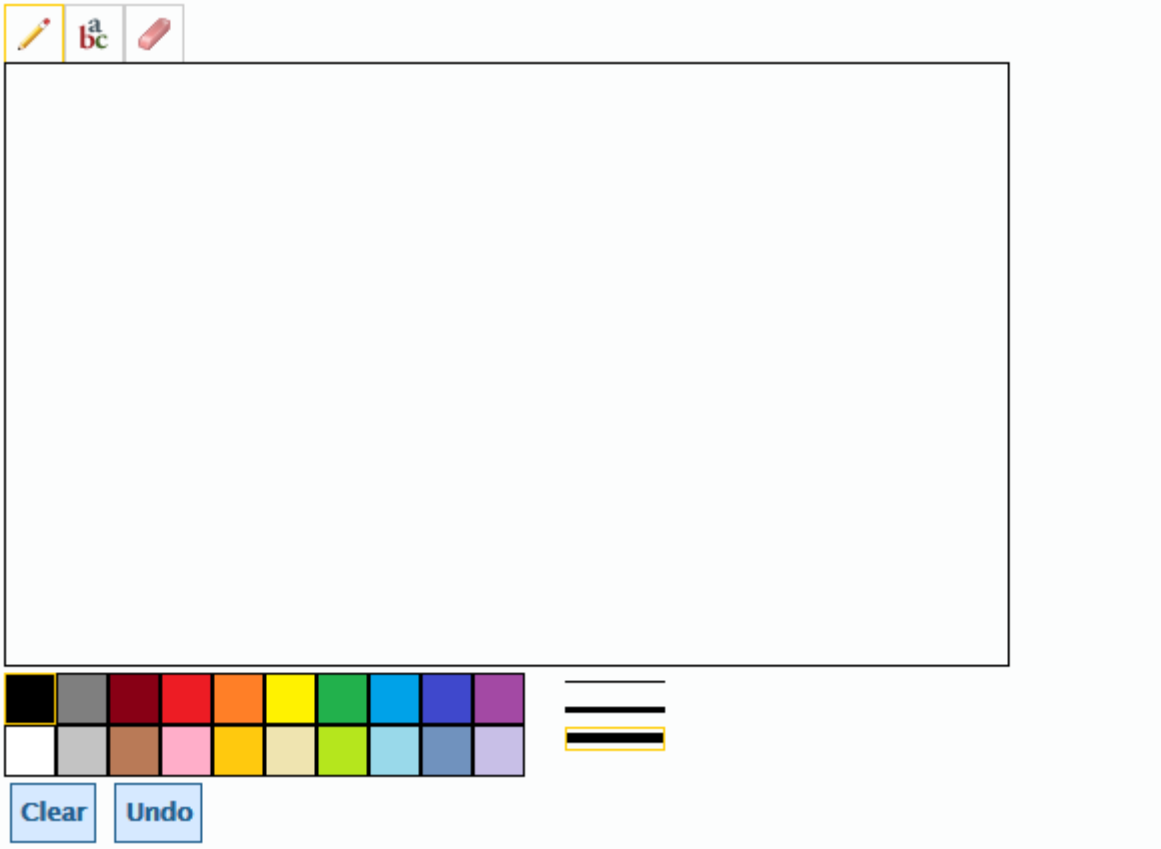
You can click **Clear** if you want to change the signature and sign again. If you want to cancel the signature, click **Cancel**.

Using Drawing Controls

When a form has a drawing control, a control similar to the following is displayed:



The following features are available:

- When the pencil button is selected, you can draw lines within the box.
- When the text button is selected, you can enter text that will be placed in the box.
- When the eraser button is selected, you can erase lines and text within the box.
- The color palette allows you to define what color the pencil and text controls will use.
- The line width options allow you to define how thick you want the lines to be that are created by the pencil and erase tools.

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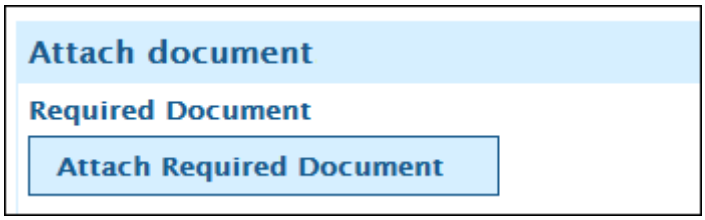
- Click **Clear** to clear the entire drawing control contents.
- Click **Undo** to undo the last action performed within the control. You can use the **Undo** button to step backwards through changes made in the control.

Note: Once a form is submitted or resubmitted, the changes made before the submission cannot be undone.

Note: If you are using a browser that does not support this control, a message stating **Your browser does not support the drawing control.** is displayed.

Attaching Documents

When a form has an attachment control, documents can be imported and attached to the form. The following is an example of an attachment control:



You can attach a document from OnBase or from an external location.

The following limitations apply when attaching a document:

- In an iOS environment, only image files or videos can be attached.
- The attachment control is not supported in iOS versions prior to iOS 6.
- The attachment control is not supported on devices using Android OS 4.4, 4.4.1, or 4.4.2.

Depending on your configuration, you may be able to either attach existing documents, attach documents from an external location, or both. The user interface for the attachment control depends on how your administrator has configured the attachment control.

For more information on attaching documents, see the following sections:

- Attaching Existing Documents on page 245
- Attaching Documents from an External Location on page 247

Attaching Existing Documents

You can attach documents that already exist in OnBase to the form if the form you are using is configured to allow existing documents to be attached.

Note: Attaching documents from OnBase is not available to users who do not have document retrieval rights. Users accessing shared forms also cannot attach documents from OnBase.

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To attach a document from OnBase:

1. From the **Available Attachment Types** drop-down, select the Document Type you want to use to attach a file to the form. Depending on your solution, you may have one or more Document Type available for selection.
2. Click **Attach** and select **Existing Document**. The OnBase document retrieval window is displayed.

Note: If the attachment control is configured to only allow existing OnBase documents to be attached, the OnBase document retrieval window is displayed automatically.

If the **Choose File to Upload** dialog box is displayed instead of the OnBase document retrieval window, then the attachment control is configured to only allow documents from an external location to be attached. For more information on attaching documents from an external location, see Attaching Documents from an External Location on page 247.

3. Use standard document retrieval methods to search for the document you want to attach and click **Find**. The results of the search are displayed in the **Search Results** section.

Note: Under the **Document Types and Groups** section, the Document Type configured for the attachment button is automatically selected by default and cannot be changed.

4. Click on a document to select it. To verify the document is the correct document to attach, expand the **Document Viewer** section to preview the document.
5. Click **Attach**. The file and its name are displayed in the control.

After attaching a document, you can preview it before the form is submitted. Click on the document name to open a new dialog box that displays the attached document.

To remove an attached document before the form is submitted, click **Remove**.

6. If the control allows multiple attachments, the attachment button remains available for additional attachment uploads. Click the **Attach [document display name]** button to attach additional documents.

   You can attach multiple documents at a time by holding the **Ctrl** key and selecting the documents you want to attach to the form. All the selected documents are attached to the form when you click the **Attach** button.

When the form is submitted, the documents are attached to the form.

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Attaching Documents from an External Location

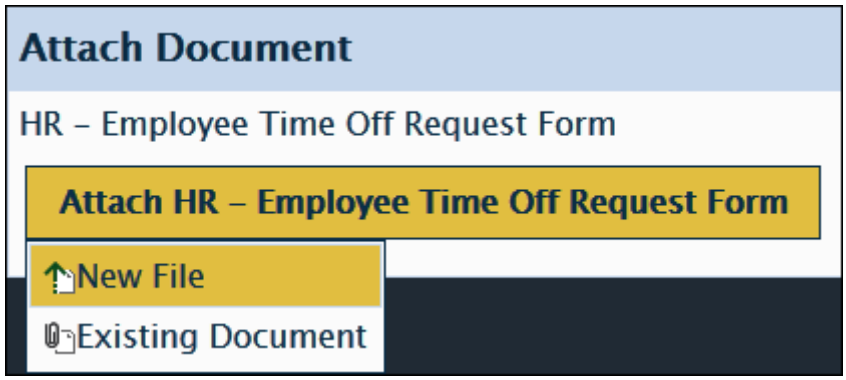
You can attach a document that exists in a location other than OnBase to the form.

The following limitations apply when attaching a document from an external location:

- Files with the .exe extension cannot be attached.
- If a file is uploaded with an unknown extension, it is uploaded as an image.
- If the file does not have an extension, it is stored using the default file format configured for the Document Type used for attachments.

To attach a document from an external location:

1. Click the **Attach [document display name]** button. For example, if the document display name is HR - Employee Time Off Request Form, the button is named **Attach HR - Employee Time Off Request Form**.



2. If a drop-down list is displayed, select **New File**. The **Choose File to Upload** dialog box is displayed.

Note: If the attachment control is configured to only allow documents from an external location to be attached, the **Choose File to Upload** dialog box is displayed automatically.

If the OnBase document retrieval window is displayed instead of the **Choose File to Upload** dialog box, then the attachment control is configured to only allow existing documents in OnBase to be attached. For more information on attaching existing documents from OnBase, see Attaching Existing Documents on page 245.

3. Locate and select the file you want to attach.

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4. Click **Open** or double-click the file to open it. The file and its name or path are displayed in the control.

   After attaching the file, you can preview it before the form is submitted. Click on the file name to open a new dialog box that displays the attached file.

   To remove an attached document before the form is submitted, click **Remove**.

5. If the control allows multiple attachments, the attachment button remains available for additional attachment uploads. Click the **Attach [document display name]** button to attach additional documents.

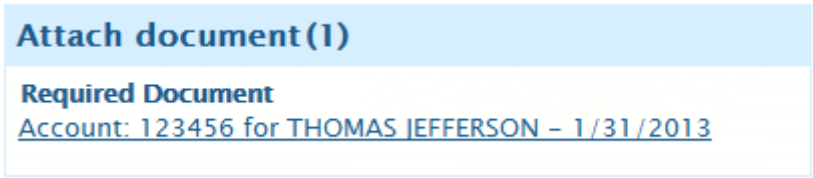
   You can attach multiple documents at a time by holding the **Ctrl** key and selecting the documents you want to attach to the form. All the selected documents are attached to the form when you click the **Attach** button.

Note: You cannot upload attachments larger than the size configured by the administrator.

When the form is submitted, the documents are attached to the form.

Viewing Attachments

When an attachment exists on a form, a link to the document is displayed on the form. The following is an example:



To view the attachment, click on the link.

In the event that an attached document is purged from the system, the link will read **Missing: Attached document has been purged** and the document will not be accessible.

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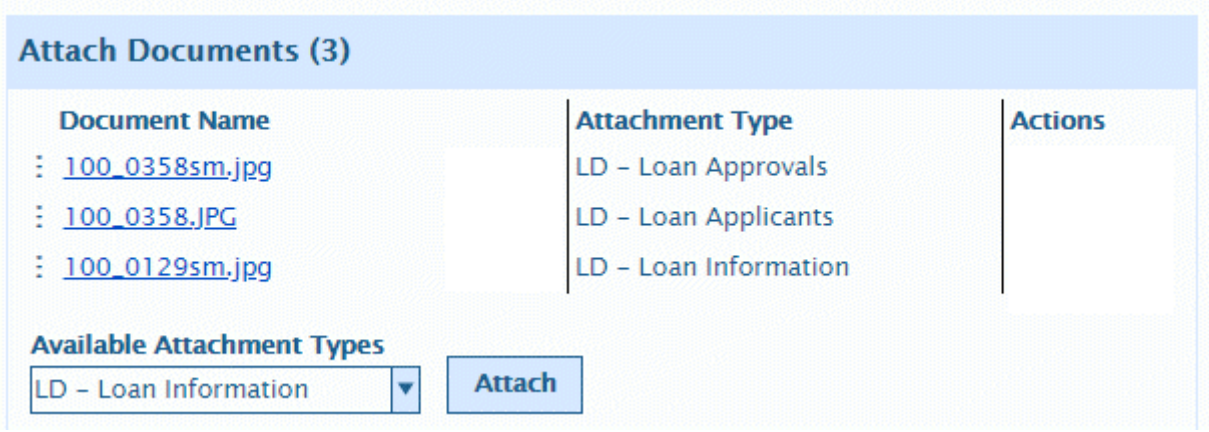
Depending on the configuration of a form, the attachment control may have sortable lists of attachments. When multiple attachments are attached in a sortable configuration, it will look similar to the following example:



You can arrange the order of the attachments in the control by clicking on the handle, denoted by three vertical dots to the left of the original filename of the attachment, and drag the file up or down in the list. Depending on your configuration, you may also be able to remove attachments from the form. When this is available, a **Remove** link will be displayed in the **Actions** column.

Keyboard Shortcuts for Attachment Control

The following keyboard shortcuts can be used to navigate the attachment control.

Keyboard Key	Description
Tab	Moves to the different components of the attachment control.
Spacebar	When the handle control is tabbed on (denoted with three vertical dots), selects the corresponding row. When tabbed to a clickable selection in a row, evokes left click function.
Up/Down Arrows	When focus in the list of attachments, moves up or down the list of attachments. When the attachment type drop-down is the focus, expands the drop-down menu.
Left/Right Arrows	When focus is in the list of attachments, moves across the attachment row.

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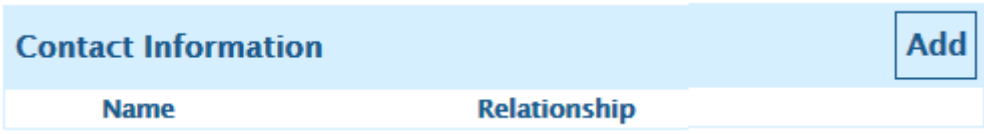
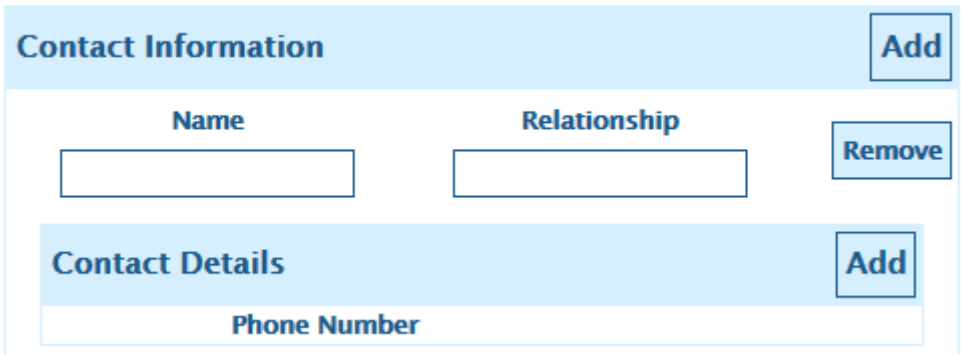
Using Nested Tables

Nested tables allow you to associate multiple line items to a single line item. The following is an example of a nested table in a form:

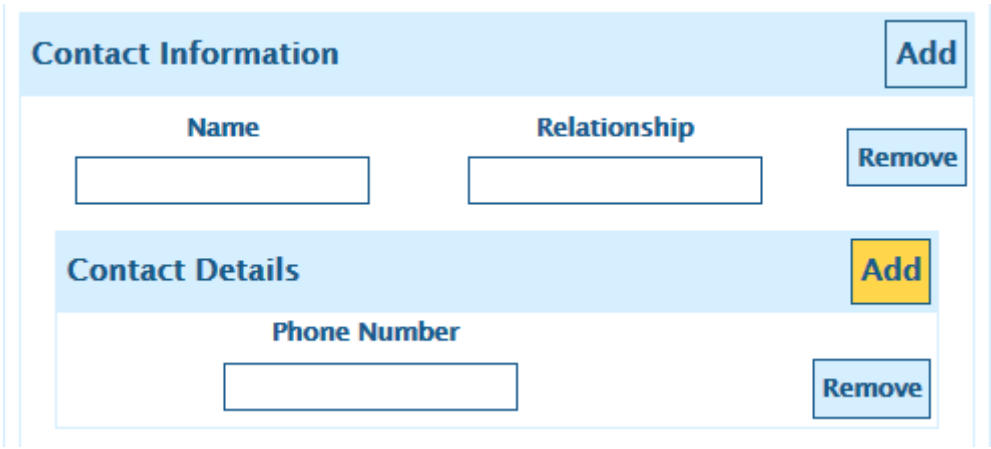


To use a nested table:

1. Click **Add**. This will expand the first level of the table.



2. Enter information for the first level.
3. Click **Add** to add a line item to relate to the first level line item. The second level expands.



4. Enter the appropriate data.
5. You can add lines at the first or second levels of the table as appropriate.

Any level of the table can be expanded or collapsed by clicking on the heading of the table.

You can remove a row by clicking the corresponding **Remove** button.

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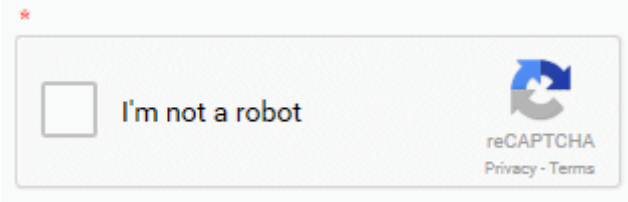
Verifying Form Interaction

Your form may be configured to require you to verify that you are an actual person filling out the form and it is not being filled out programmatically. When this is required, the following control is displayed on your form:



Note: When using Microsoft Internet Explorer, Compatibility Viewing must be turned off. If this is not turned off, you will get a message stating that a browser upgrade is required.

Note: The form must be online for this control to have access to the required CAPTCHA service.

To complete this field:

1. Select the **I'm not a robot** check box.
2. A group of images with a question will display. Follow the on-screen instructions to answer the question correctly.
3. When the question is answered, click **Verify**.
4. Once it is verified correctly, a green check will display in the control and the form can be submitted once all other information is correctly entered.

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Reading Bar Codes

When a form has a bar code reader button, a bar code can be read and the value read from the bar code can be populated in a field designated by the system administrator. To use a bar code reader button:

1. Click the bar code reader button. This button's name will vary by form.
2. On a desktop system:
   - Upon clicking the button, the **Choose File to Upload** dialog box is displayed.
   - Navigate to the directory where the image containing the bar code resides.
   - Select the appropriate image and click **Open**. Upon the bar code being successfully read, a message under the bar code reader button stating **Successfully read bar code** is displayed and the value is populated into the appropriate field. If a bar code was not recognized in the selected file, a message stating **Failed to read bar code** is displayed.

   In an iOS environment:
   - Upon clicking the button, two options are available: **Take Photo or Video** and **Choose Existing**.
   - Click **Choose Existing** to select an image from the **Camera Roll**. Select **Take Photo or Video** to create a new image. Upon the bar code being successfully read, a message under the bar code reader button stating **Successfully read bar code** is displayed and the value is populated into the appropriate field. If a bar code was not recognized in the selected file, a message stating **Failed to read bar code** is displayed.

   In an Android environment:
   - Upon clicking the button, the option to choose a Gallery image is available.
   - Click **Gallery** and select the image.

     If you are in a shared form, you can also choose **Camera** and take a picture of a bar code. Upon clicking **Save**, the value from the bar code is populated in the field.

     Upon the bar code being successfully read, a message under the bar code reader button stating **Successfully read bar code** is displayed and the value is populated into the appropriate field. If a bar code was not recognized in the selected file, a message stating **Failed to read bar code** is displayed.

Note: This feature is not supported on devices using Android OS 4.4, 4.4.1, or 4.4.2.

The following bar code types are supported:

- Codabar
- Code 128
- Code 39 (3 of 9)
- Code 93
- EAN 9 and 13
- Interleaved 2 of 5
- UPC-A
- UPC-E

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Printing Unity Forms

If your form contains a print button, you can print all of the tabs in the form you are viewing. To print, click the button in the form and select the appropriate print options from the **Print** dialog box that is displayed. Alternately, you can press **Ctrl + P** on the keyboard to access the **Print** dialog box.

Note: If you do not have printing rights in OnBase and you use **Ctrl + P** to print, a blank page will be printed.

Note: Unity Forms cannot be printed from an Android device.

Also, Unity Forms can be printed in the Unity Client by selecting **Send To** | **Print** in the Document ribbon of an open form or by right-clicking on the header and selecting **Send To** | **Print**.

Also, Unity Forms can be printed in the Web Client by right-clicking on an open form and selecting **Print**.

The following are items of note concerning printing:

- The print button's name will vary by form.
- When printing a form with a multi-line text box, the entire contents of the field is printed regardless of whether or not you can see all of the data in the field on the screen.
- When printing a form with sections, the entire contents of a section is printed regardless of whether or not the section is expanded or collapsed.
- When printing a form, controls such as buttons, page tabs, color picker, and drawing tools will not be printed.
- When printing a form with a wide table that extends past the printable page area, the table may be truncated. Only the portion of the table within the printable page area will be printed.
- If an invalid signature is printed, a red border is printed around the control. In addition, the label is displayed in red.
- When printing in Internet Explorer, settings in the **Page Setup** dialog box affect how Unity Forms are printed. The settings that can affect the way a form is printed are **Print Background Colors and Images**, **Margins**, and **Headers and Footers**.
- When printing in Internet Explorer, background images and signatures are not supported.
- The Forms Designer cannot show page breaks. When printing Unity Forms with multiple pages, the printed pages may not correspond with the pages in the Forms Designer.

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Retrieving and Viewing a Form

To retrieve and view a form:

1. In the **Home** ribbon, click **Retrieval**.
2. Select the Document Type in which your form resides.
3. Enter search criteria.
4. Click **Find**.
5. Double-click on the form you want to open from the **Search Results** list.

Editing Submitted Forms

To edit a submitted form:

1. Retrieve a form from the Unity Client.
2. Open the form.
3. Edit the form as needed.
4. Click **Submit**. Upon submitting the form, a new revision of the form is created if the Document Type is revisable. If the Document Type is not revisable, the form will be updated.

Caution: As a user, if you open multiple instances of a Unity Form, including instances within the Workflow interface, all instances of the Unity Form will be editable. When multiple instances of a Unity Form are open at the same time, there is a potential to overwrite data from within one of the instances with data from within another instance of the Unity Form. When there are multiple instances of a Unity Form open, the data in the instance of the Unity Form that is saved last is kept and overwrites any data that was previously saved in another open instance. It is recommended that a user opens only one instance of a Unity Form at a time.

Saving Changes When Navigating Away From a Form

Upon leaving the form by selecting another form or by accessing another context of the Unity Client, a dialog box displays asking **You have not submitted the form. Would you like to submit the form before continuing?** You can click **Yes** to submit form changes or click **No** to cancel changes.

Note: If the form contained invalid values, the values are not saved upon navigating away from the form.

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Audit Log

The document history of a Unity Form includes the history of values in form fields. To view the history of form fields within a form:

1. From an open Unity Form, click **History,** or from a document hit list, right-click on the Unity Form and select **History**. The **Document History** tab is displayed.
2. Click the **Form** tab. The **Form** tab contains information about changes to form field values.

The following columns are displayed in the **Form** tab:

Column	Description
Log Date	The date that the change was made to the field.
Log Time	The time that the change was made to the field.
User name	The user name of the user that made the change to the field.
Field Name	The name of the field that was changed.
Instance ID	When changes are made to a Multi-Instance Keyword Type Group, this column identifies the instance that was affected.
Action	The action that occurred on the field identified in the **Field Name** column. **Added**, **Deleted**, **Modified**, or **Attached** will be displayed.
Old Value	The previous value that was associated with the field.
New Value	The new value that was changed in the associated field.

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Creating Unity Forms in the Web Client

To create a new form:

1. Select **New Form** from the menu in the upper left-hand corner.
2. This displays the **Forms** panel, which lists the forms that are available to you. The list of forms displayed are both E-Forms and Unity Forms in the system.
3. Select the Unity Form that you want to complete and submit. The form displays.
4. Complete the form.
5. When you have finished filling out the form, submit the form.

Caution: In some cases, if a user modifies a Unity Form and navigates away from it before saving, the user is not prompted to save the changes, and the changes are not saved. Always click a submit button to ensure that changes are saved.

   A message stating **The form is being saved.** is displayed. When the form is successfully transmitted, the system asks **Would you like to complete another form?**
6. To complete another form of the same type, click **OK**. Click **Cancel** if you are finished completing forms of this type.

Note: Date formats follow the workstation's system locale.

Note: When you create a new form in a revisable Document Type, a new form is created, regardless of whether or not keyword values of the new form match the keyword values of an existing form.

Tip: You can cut (Ctrl + x), copy (Ctrl + c), and paste (Ctrl + v) text to and from form fields.

Validating Data in Forms

Data is validated in forms to ensure that the data entered in the form is in the expected format.

The value of a field is validated upon leaving it after entering data by pressing the **Tab** key or by clicking in a new field. When a field's value is not valid, a red border is displayed around the field. If you click in an invalid field, information about why the value in the field is not valid appears next to the field.

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Upon clicking **Submit** on a form, all the values in all the fields on the form are validated. If any field contains an invalid value, a notification bar appears directly above the form that displays the name of the invalid field or fields and the reason why the value in the field or fields is invalid next to the field name. The form cannot be submitted until the values in the invalid fields are no longer invalid.

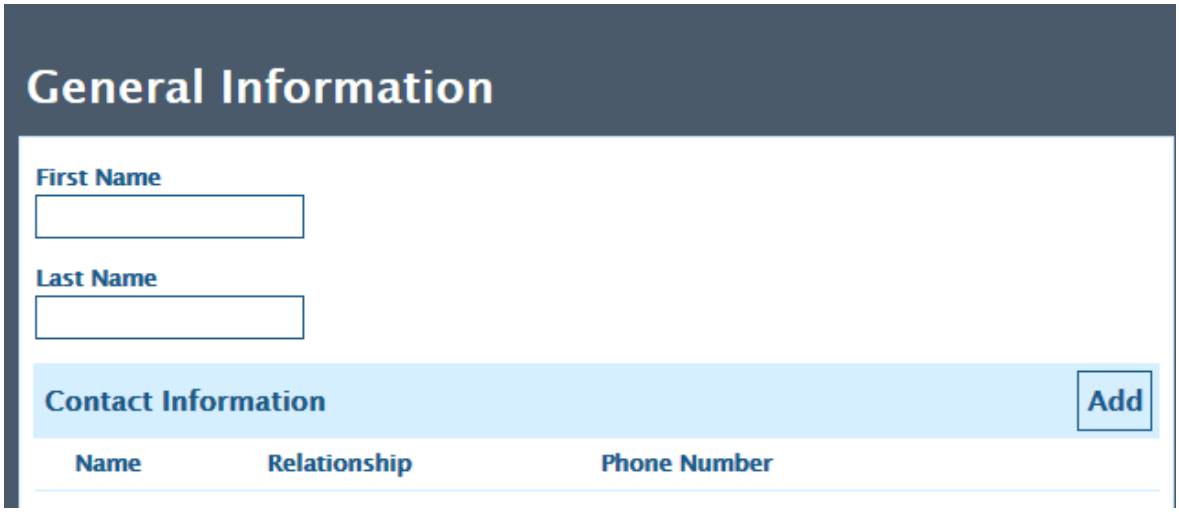
Tip: You can click on the name of an invalid field in the notification bar to navigate to that field and to display a message explaining the reason why the field is invalid.

Using Repeating Sections

Repeating sections allow you to easily configure Multi-Instance Keyword Type Groups on a form. Repeating sections also allow you to configure non-keyword fields that you would like to have multiple instances of on a form. Repeating sections allow you to define what fields can be repeated without requiring you to define the number of instances allowed during form design. You can create fields on the fly at run time. This is accomplished by simply creating a repeating section or table and placing controls that you want to repeat within it.

Note: If the repeating section on your form is not configured with a Multi-Instance Keyword Type Group, the data entered in the fields in the repeating section is saved to the **Disk Group (XML)** Document Type.

In the following example, upon entering data in the first set of fields, you can click **Add** to create another set of fields for data entry.



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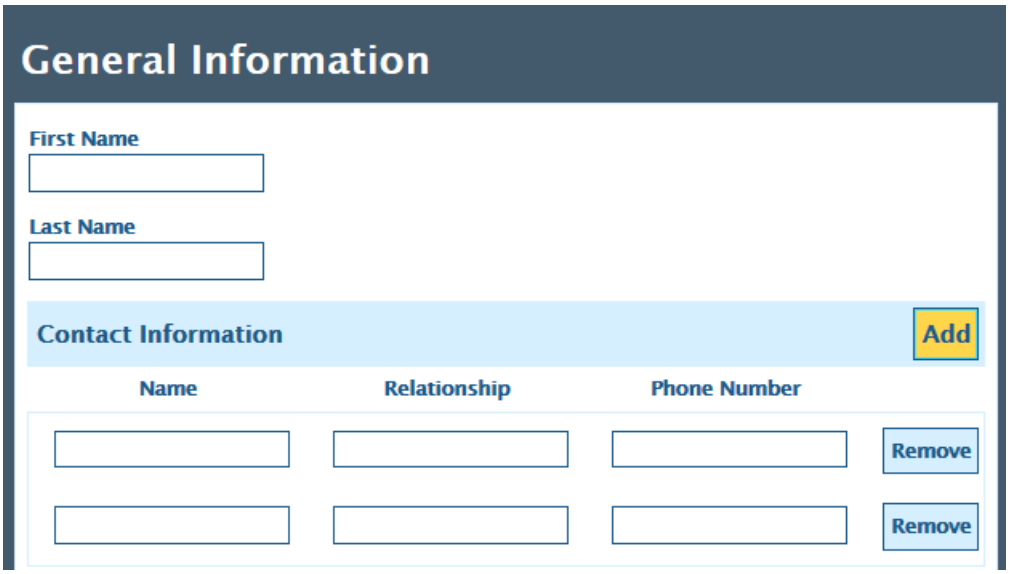
This form allows effortless field creation at the time the user needs additional fields. In the next screen, we can see that another row was added to enter an additional item.



To create a set of values for a Multi-Instance Keyword Type Group:

1. In the form, click **Add**.
2. Fields for the keywords within a Multiple Instance Keyword Type Group are displayed for input.
3. Enter the appropriate values for the keywords.
4. Repeat steps 1 to 3 for each instance of a Multi-Instance Keyword Type Group you want to add to the form.
5. Save or submit the form.

Note: You can remove an instance by clicking the corresponding **Remove** button.

Using Masking

When a field has a required mask, upon entering the field, the mask is displayed.

Using Forms with Multiple Pages

When a form has multiple pages, tabs are available at the top of the form. To access a different page, click on the corresponding tab.

You can also navigate the pages of a form using the TAB key. Press the TAB key until the desired page is highlighted, then press ENTER to select the page.

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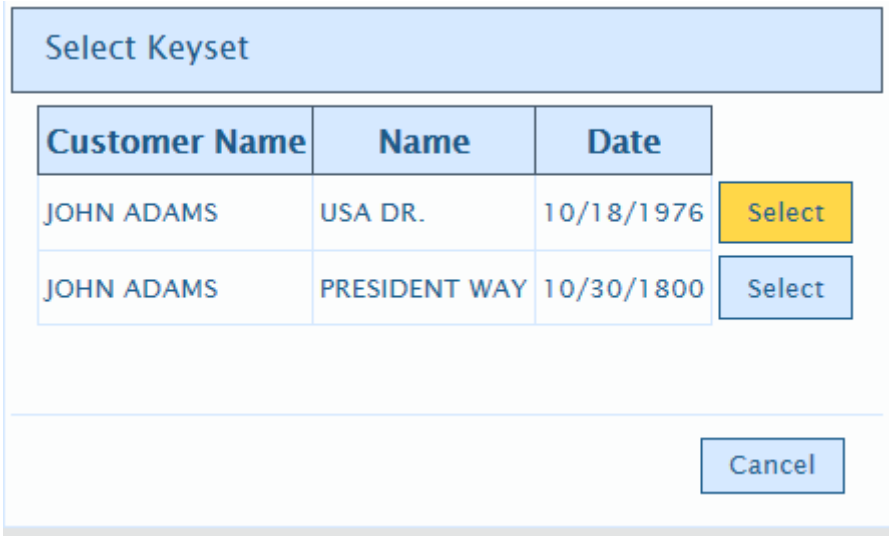
Using AutoFill Keyword Sets on Forms

When a form is configured with an AutoFill Keyword Set, a primary value can be entered on a form and the secondary values will be populated. Enter a primary keyword value and press **Tab** on the keyboard to expand the AutoFill Keyword Set. Alternately, you can press **Enter** to expand an AutoFill Keyword Set after entering a primary keyword value. Upon pressing **Enter** a second time after expanding the AutoFill Keyword Set, the form will submit. If a primary value has more than one set of secondary values associated with it, the values will be displayed for selection. The following is an example of this:



Click **Select** next to the values you want to use for the form.

Keyword Types belonging to an AutoFill Keyword Set that are assigned to the Document Type the form belongs to will be expanded regardless of whether the Keyword Types are on the form itself. The expanded Keyword Type values will be displayed in the keyword panel.

When using Single Instance Keyword Type Groups and standard Keyword Types together, values will be expanded in both the Keyword Type Group and across standard Keyword Types. If the primary keyword is in a Single Instance Keyword Type Group or standard Keyword Type, values in Multiple Instance Keyword Type Groups are not expanded.

When a primary Keyword Type is in a Multiple Instance Keyword Type Group, only the Keyword Types in the AutoFill Keyword Type Set that are a part of the Multiple Instance Keyword Type Group are expanded.

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If using Unity Forms in conjunction with the Unity Briefcase, and the Unity Briefcase Field Application is configured with an AutoFill Keyword Set, the AutoFill Keyword Set will be available on the form. AutoFill Keyword Sets that are not included in the Field Application are not available.

Caution: Unity Forms only supports multiple AutoFill Keyword Sets when using the form's user interface. Multiple AutoFill Keyword Sets are not supported in Unity Forms during re-indexing or when editing keyword values in a keyword panel. Multiple AutoFill Keyword Sets must be expanded within the form.

Using Lookups

When a form is configured with a lookup button, you can enter values into fields that have been associated with a lookup button and find an AutoFill Keywords Set that contains the value(s) entered. For example, if you need to find an account number, but you only have a person's name and address, you can enter the information you have in the form when configured to do so. Then, click **Lookup** and find the account number you need to populate in the form. To use a lookup:

1. Enter values in the fields that will help identify the AutoFill Keyword Set you are trying to locate. Depending on the configuration of the form, not all fields on the form will perform the lookup function.
2. Click **Lookup**. If only one value set exists for the information entered, the form fields associated with the AutoFill Keyword Set are populated.

   If multiple value sets exist for the information entered, the **Select Reverse Lookup Match** window is displayed.
3. Click **Select** next to the values you want to use to populate the form. The fields that are configured on the form that are associated with the selected AutoFill Keyword Set are populated.

If using Unity Forms in conjunction with the Unity Briefcase, **Lookup** buttons are disabled when forms are opened in the Briefcase application.

Using Auto Number Keyword Types

If a Unity Form has an auto numbering Keyword Type on it and the Keyword Type is a standard Keyword Type, the value of the Keyword Type will display the auto incremented value upon loading the form in the viewer.

If the Keyword Type is a part of a Multi-Instance Keyword Type Group, the value will increment upon submitting the form.

If using Unity Forms in conjunction with the Unity Briefcase, auto numbered keyword values will not be generated while forms are offline. Existing auto numbered keyword values are displayed on forms when viewing forms offline.

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Required Fields

When a field is required, an asterisk is displayed beside the field. When an asterisk is displayed, a value must be entered in the field before you can successfully submit the form.

Note: If the field that is required is read-only, the form will save if there isn't a value in the read-only, required field.

Using Date Fields

When a field is associated with date-formatted data, clicking inside of the field will display the following date selection control:

The arrow button at the top allows you to navigate to a different month. The drop-down list allows you to select the relevant year. Click on the date to select it.

Note: If you are in a locale that uses a non-Gregorian calendar, the calendar control is not displayed. Instead, a masked field is displayed, allowing you enter the date in the proper format. Leading zeros must be entered for days and months.

Using Date & Time Fields

When a field is associated with date/time-formatted data, clicking inside of the field will display the following date/time masked control:

Enter the date and time within the formatted field, the date followed by the time.

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Using Drop-Down Lists

Some fields in a form are configured to use Data Sets. You can use the drop-down list next to these fields to select a value. In addition, you can type values into a field and all values in the Data Set that match the currently entered characters will display for selection.

Using Radio Button Groups

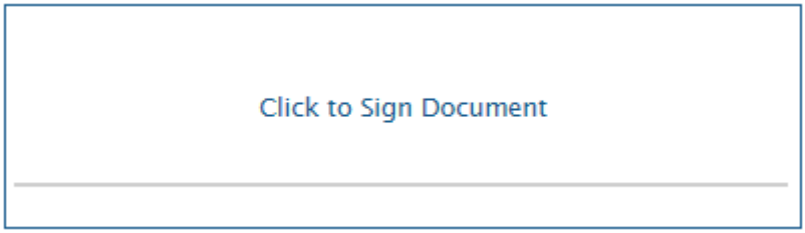
Some fields in a form are configured to use a Radio Button Group. You can select the radio button that corresponds to the appropriate value.

Note: If the form functionality depends on a selected radio button, upon radio button selection the form will reflect this functionality.

Using Signature Fields

When a form has signature fields, you can sign in the field using your mouse. In addition, if you are using a touchpad-enabled device, you can use a stylus to sign the form. To sign:

1. Click on the signature control. It will say **Click to Sign Document**.



2. A signature field will display.

3. Sign in the designated signature area.
4. Click **Apply Signature**.

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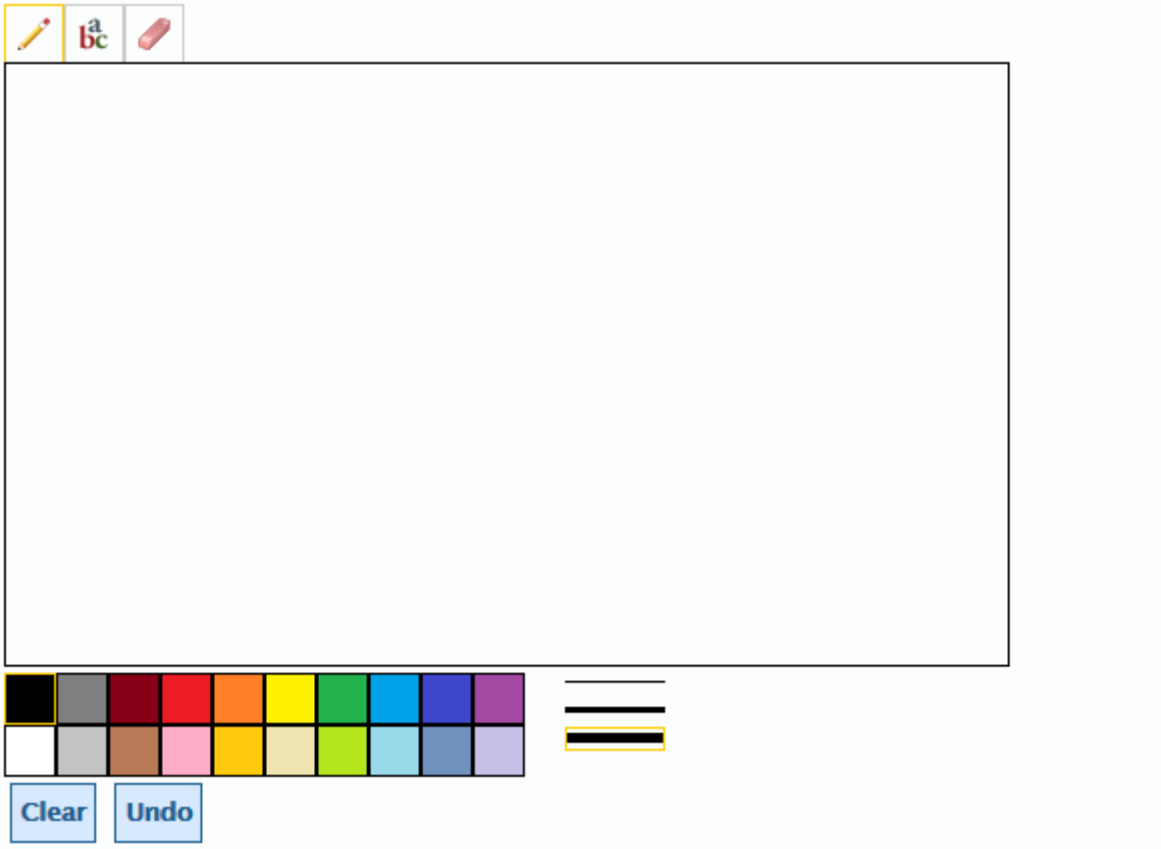
You can click **Clear** if you want to change the signature and sign again. If you want to cancel the signature, click **Cancel**.

Using Drawing Controls

When a form has a drawing control, a control similar to the following is displayed:



The following features are available:

- When the pencil button is selected, you can draw lines within the box.
- When the text button is selected, you can enter text that will be placed in the box.
- When the eraser button is selected, you can erase lines and text within the box.
- The color palette allows you to define what color the pencil and text controls will use.
- The line width options allow you to define how thick you want the lines to be that are created by the pencil and erase tools.

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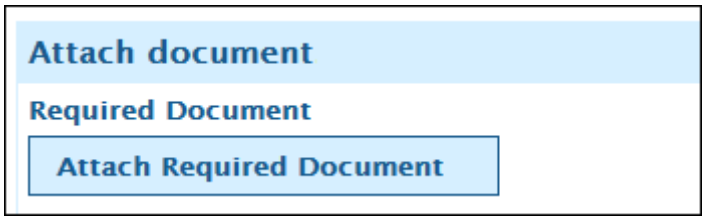
- Click **Clear** to clear the entire drawing control contents.
- Click **Undo** to undo the last action performed within the control. You can use the **Undo** button to step backwards through changes made in the control.

Note: Once a form is submitted or resubmitted, the changes made before the submission cannot be undone.

Note: If you are using a browser that does not support this control, a message stating **Your browser does not support the drawing control.** is displayed.

Attaching Documents

When a form has an attachment control, documents can be imported and attached to the form. The following is an example of an attachment control:



You can attach a document from OnBase or from an external location.

The following limitations apply when attaching a document:

- In an iOS environment, only image files or videos can be attached.
- The attachment control is not supported in iOS versions prior to iOS 6.
- The attachment control is not supported on devices using Android OS 4.4, 4.4.1, or 4.4.2.

Depending on your configuration, you may be able to either attach existing documents, attach documents from an external location, or both. The user interface for the attachment control depends on how your administrator has configured the attachment control.

For more information on attaching documents, see the following sections:

- Attaching Existing Documents on page 264
- Attaching Documents from an External Location on page 266

Attaching Existing Documents

You can attach documents that already exist in OnBase to the form if the form you are using is configured to allow existing documents to be attached.

Note: Attaching documents from OnBase is not available to users who do not have document retrieval rights. Users accessing shared forms also cannot attach documents from OnBase.

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To attach a document from OnBase:

1. From the **Available Attachment Types** drop-down, select the Document Type you want to use to attach a file to the form. Depending on your solution, you may have one or more Document Type available for selection.
2. Click **Attach** and select **Existing Document**. The OnBase document retrieval window is displayed.

Note: If the attachment control is configured to only allow existing OnBase documents to be attached, the OnBase document retrieval window is displayed automatically.

If the **Choose File to Upload** dialog box is displayed instead of the OnBase document retrieval window, then the attachment control is configured to only allow documents from an external location to be attached. For more information on attaching documents from an external location, see Attaching Documents from an External Location on page 247.

3. Use standard document retrieval methods to search for the document you want to attach and click **Find**. The results of the search are displayed in the **Search Results** section.

Note: Under the **Document Types and Groups** section, the Document Type configured for the attachment button is automatically selected by default and cannot be changed.

4. Click on a document to select it. To verify the document is the correct document to attach, expand the **Document Viewer** section to preview the document.
5. Click **Attach**. The file and its name are displayed in the control.

After attaching a document, you can preview it before the form is submitted. Click on the document name to open a new dialog box that displays the attached document.

To remove an attached document before the form is submitted, click **Remove**.

6. If the control allows multiple attachments, the attachment button remains available for additional attachment uploads. Click the **Attach [document display name]** button to attach additional documents.

   You can attach multiple documents at a time by holding the **Ctrl** key and selecting the documents you want to attach to the form. All the selected documents are attached to the form when you click the **Attach** button.

When the form is submitted, the documents are attached to the form.

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Attaching Documents from an External Location

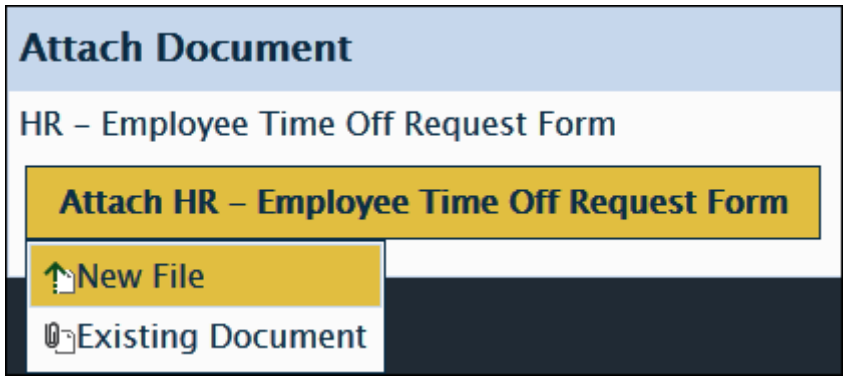
You can attach a document that exists in a location other than OnBase to the form.

The following limitations apply when attaching a document from an external location:

- Files with the .exe extension cannot be attached.
- If a file is uploaded with an unknown extension, it is uploaded as an image.
- If the file does not have an extension, it is stored using the default file format configured for the Document Type used for attachments.

To attach a document from an external location:

1. Click the **Attach [document display name]** button. For example, if the document display name is HR - Employee Time Off Request Form, the button is named **Attach HR - Employee Time Off Request Form**.



2. If a drop-down list is displayed, select **New File**. The **Choose File to Upload** dialog box is displayed.

Note: If the attachment control is configured to only allow documents from an external location to be attached, the **Choose File to Upload** dialog box is displayed automatically.

If the OnBase document retrieval window is displayed instead of the **Choose File to Upload** dialog box, then the attachment control is configured to only allow existing documents in OnBase to be attached. For more information on attaching existing documents from OnBase, see Attaching Existing Documents on page 264.

3. Locate and select the file you want to attach.

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4. Click **Open** or double-click the file to open it. The file and its name or path are displayed in the control.

   After attaching the file, you can preview it before the form is submitted. Click on the file name to open a new dialog box that displays the attached file.

   To remove an attached document before the form is submitted, click **Remove**.

5. If the control allows multiple attachments, the attachment button remains available for additional attachment uploads. Click the **Attach [document display name]** button to attach additional documents.

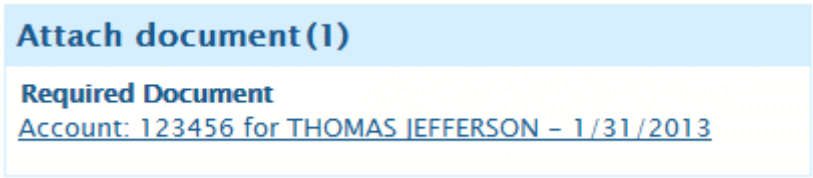
   You can attach multiple documents at a time by holding the **Ctrl** key and selecting the documents you want to attach to the form. All the selected documents are attached to the form when you click the **Attach** button.

Note: You cannot upload attachments larger than the size configured by the administrator.

When the form is submitted, the documents are attached to the form.

Viewing Attachments

When an attachment exists on a form, a link to the document is displayed on the form. The following is an example:



To view the attachment, click on the link.

In the event that an attached document is purged from the system, the link will read **Missing: Attached document has been purged** and the document will not be accessible.

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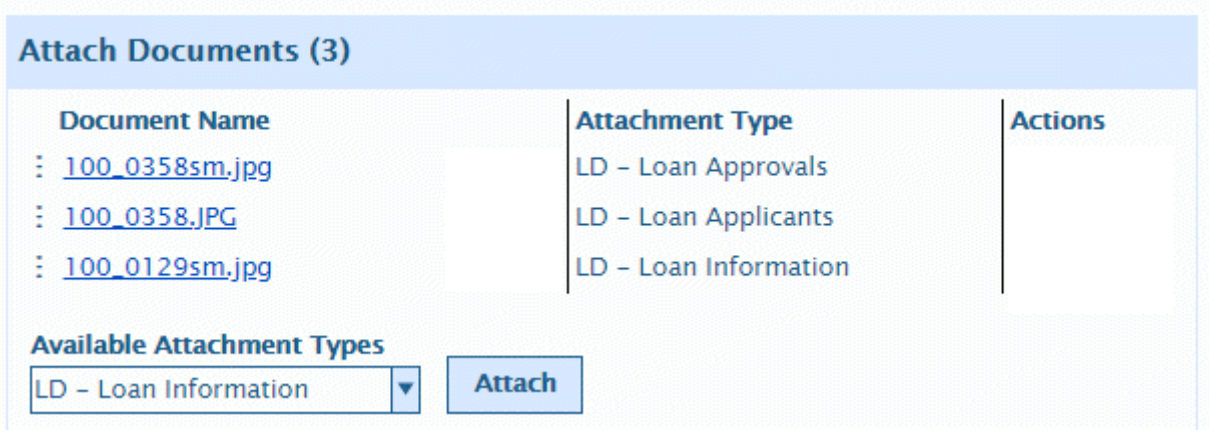
Depending on the configuration of a form, the attachment control may have sortable lists of attachments. When multiple attachments are attached in a sortable configuration, it will look similar to the following example:



You can arrange the order of the attachments in the control by clicking on the handle, denoted by three vertical dots to the left of the original filename of the attachment, and drag the file up or down in the list. Depending on your configuration, you may also be able to remove attachments from the form. When this is available, a **Remove** link will be displayed in the **Actions** column.

Keyboard Shortcuts for Attachment Control

The following keyboard shortcuts can be used to navigate the attachment control.

Keyboard Key	Description
Tab	Moves to the different components of the attachment control.
Spacebar	When the handle control is tabbed on (denoted with three vertical dots), selects the corresponding row. When tabbed to a clickable selection in a row, evokes left click function.
Up/Down Arrows	When focus in the list of attachments, moves up or down the list of attachments. When the attachment type drop-down is the focus, expands the drop-down menu.
Left/Right Arrows	When focus is in the list of attachments, moves across the attachment row.

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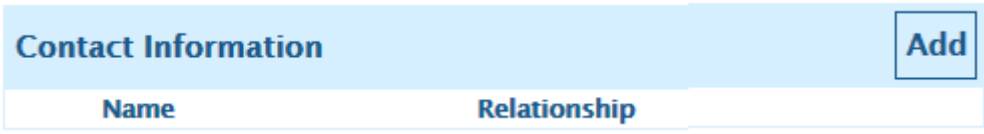
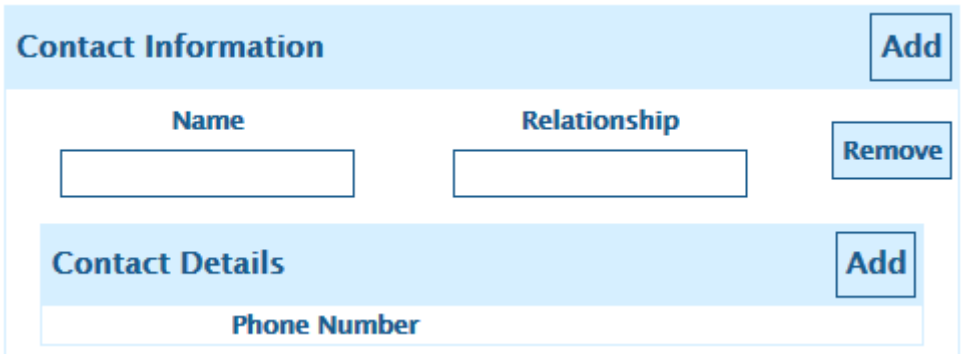
Using Nested Tables

Nested tables allow you to associate multiple line items to a single line item. The following is an example of a nested table in a form:

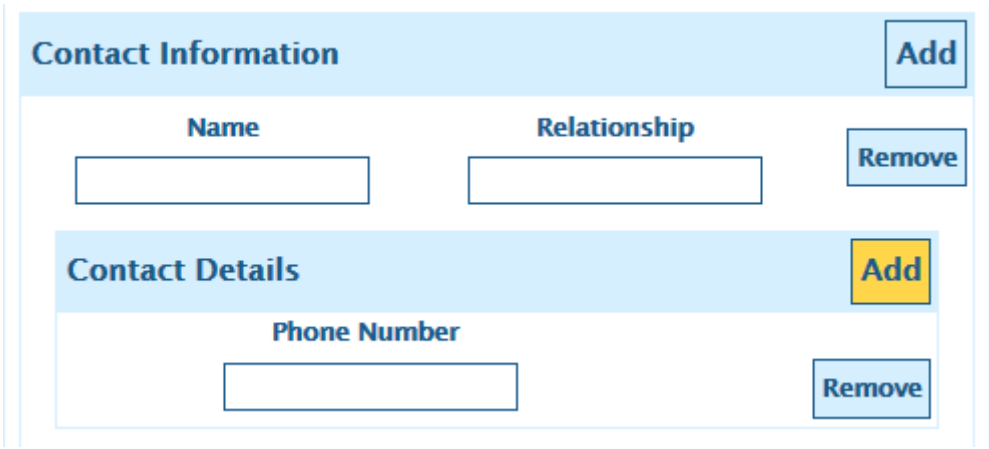


To use a nested table:

1. Click **Add**. This will expand the first level of the table.



2. Enter information for the first level.
3. Click **Add** to add a line item to relate to the first level line item. The second level expands.



4. Enter the appropriate data.
5. You can add lines at the first or second levels of the table as appropriate.

Any level of the table can be expanded or collapsed by clicking on the heading of the table.

You can remove a row by clicking the corresponding **Remove** button.

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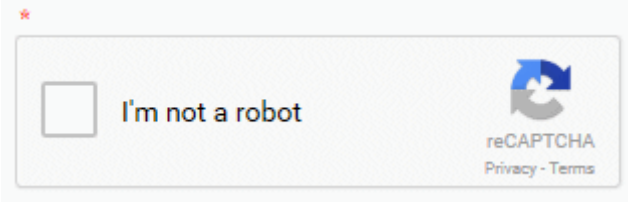
Verifying Form Interaction

Your form may be configured to require you to verify that you are an actual person filling out the form and it is not being filled out programmatically. When this is required, the following control is displayed on your form:



Note: When using Microsoft Internet Explorer, Compatibility Viewing must be turned off. If this is not turned off, you will get a message stating that a browser upgrade is required.

Note: The form must be online for this control to have access to the required CAPTCHA service.

To complete this field:

1. Select the **I'm not a robot** check box.
2. A group of images with a question will display. Follow the on-screen instructions to answer the question correctly.
3. When the question is answered, click **Verify**.
4. Once it is verified correctly, a green check will display in the control and the form can be submitted once all other information is correctly entered.

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Reading Bar Codes

When a form has a bar code reader button, a bar code can be read and the value read from the bar code can be populated in a field designated by the system administrator. To use a bar code reader button:

1. Click the bar code reader button. This button's name will vary by form.
2. On a desktop system:
   - Upon clicking the button, the **Choose File to Upload** dialog box is displayed.
   - Navigate to the directory where the image containing the bar code resides.
   - Select the appropriate image and click **Open**. Upon the bar code being successfully read, a message under the bar code reader button stating **Successfully read bar code** is displayed and the value is populated into the appropriate field. If a bar code was not recognized in the selected file, a message stating **Failed to read bar code** is displayed.

   In an iOS environment:
   - Upon clicking the button, two options are available: **Take Photo or Video** and **Choose Existing**.
   - Click **Choose Existing** to select an image from the **Camera Roll**. Select **Take Photo or Video** to create a new image. Upon the bar code being successfully read, a message under the bar code reader button stating **Successfully read bar code** is displayed and the value is populated into the appropriate field. If a bar code was not recognized in the selected file, a message stating **Failed to read bar code** is displayed.

   In an Android environment:
   - Upon clicking the button, the option to choose a Gallery image is available.
   - Click **Gallery** and select the image.

     If you are in a shared form, you can also choose **Camera** and take a picture of a bar code. Upon clicking **Save**, the value from the bar code is populated in the field.

     Upon the bar code being successfully read, a message under the bar code reader button stating **Successfully read bar code** is displayed and the value is populated into the appropriate field. If a bar code was not recognized in the selected file, a message stating **Failed to read bar code** is displayed.

Note: This feature is not supported on devices using Android OS 4.4, 4.4.1, or 4.4.2.

The following bar code types are supported:

- Codabar
- Code 128
- Code 39 (3 of 9)
- Code 93
- EAN 9 and 13
- Interleaved 2 of 5
- UPC-A
- UPC-E

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Printing Unity Forms

If your form contains a print button, you can print all of the tabs in the form you are viewing. To print, click the button in the form and select the appropriate print options from the **Print** dialog box that is displayed. Alternately, you can press **Ctrl + P** on the keyboard to access the **Print** dialog box.

Note: If you do not have printing rights in OnBase and you use **Ctrl + P** to print, a blank page will be printed.

Note: Unity Forms cannot be printed from an Android device.

Also, Unity Forms can be printed in the Unity Client by selecting **Send To** | **Print** in the Document ribbon of an open form or by right-clicking on the header and selecting **Send To** | **Print**.

Also, Unity Forms can be printed in the Web Client by right-clicking on an open form and selecting **Print**.

The following are items of note concerning printing:

- The print button's name will vary by form.
- When printing a form with a multi-line text box, the entire contents of the field is printed regardless of whether or not you can see all of the data in the field on the screen.
- When printing a form with sections, the entire contents of a section is printed regardless of whether or not the section is expanded or collapsed.
- When printing a form, controls such as buttons, page tabs, color picker, and drawing tools will not be printed.
- When printing a form with a wide table that extends past the printable page area, the table may be truncated. Only the portion of the table within the printable page area will be printed.
- If an invalid signature is printed, a red border is printed around the control. In addition, the label is displayed in red.
- When printing in Internet Explorer, settings in the **Page Setup** dialog box affect how Unity Forms are printed. The settings that can affect the way a form is printed are **Print Background Colors and Images**, **Margins**, and **Headers and Footers**.
- When printing in Internet Explorer, background images and signatures are not supported.
- The Forms Designer cannot show page breaks. When printing Unity Forms with multiple pages, the printed pages may not correspond with the pages in the Forms Designer.

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