University of Colorado
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OnBase by Hyland

OnBase Guide - Using Preferred Names

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

Complexity Level: Departmental Workflow Developers, Departmental Form Developers

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Background

A preferred name is one that may differ from someone's primary/legal name.

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

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

NOTE: There may be situations where you need to use the primary/legal name on a student's or employee's record. Please also consider situations where the preferred name may not be appropriate for the audience receiving notifications (ex. if parents are receiving a communication about a student).

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

In addition, the Student Preferred First Name is available in the standard student autofill keyword set (X - ICS - Basic Student Info AFKS).

Prerequisites

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

To use the preferred name script in Unity forms, you will need to have the required user group privileges to configure forms in the Unity client.

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

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

Steps to Complete in Configuration

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

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

Both can be used on the same document type.

Using Preferred Names Script in Workflow

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

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

Using Preferred Names Script in Unity Forms

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

- StudentID_pre
- EmployeeID_pre

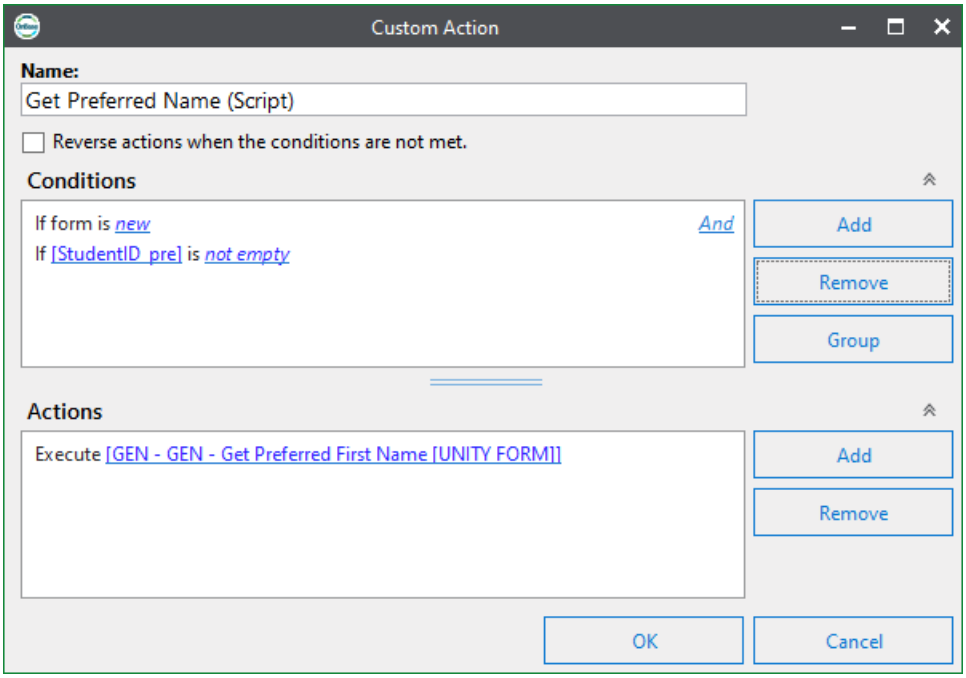
Create a field on the form for each preferred name keyword that is being used. The fields must have the following IDs for the script to work:

- StudentPreferredName
- EmployeePreferredName

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

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

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



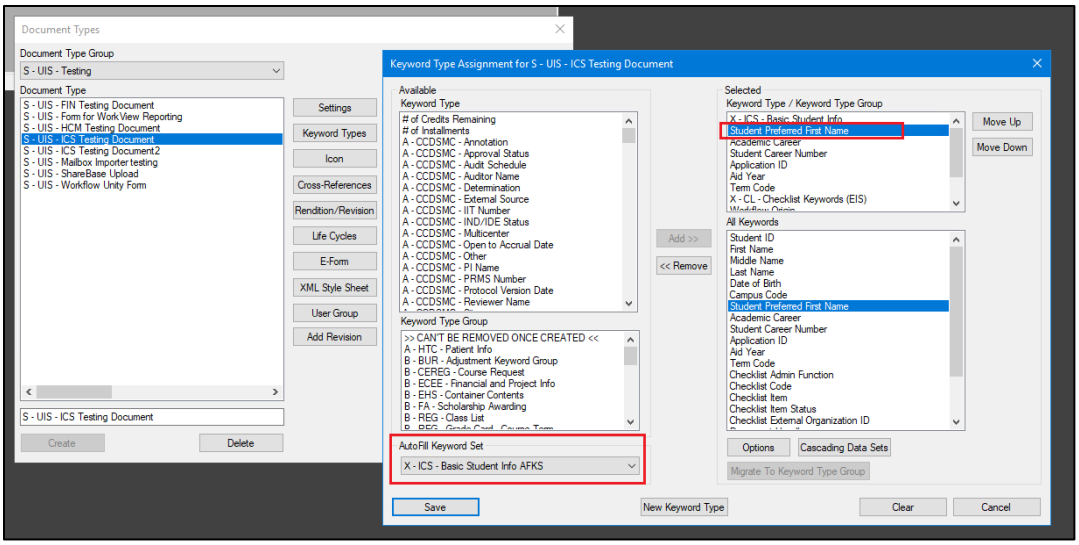
Using Preferred Name with an AFKS

Student Preferred First Name is available in the *X - ICS - Basic Student Info AFKS* autofill keyword set.

Employee Preferred First Name is available in the *X - ICS - Basic Employee Info AFKS* autofill keyword set.

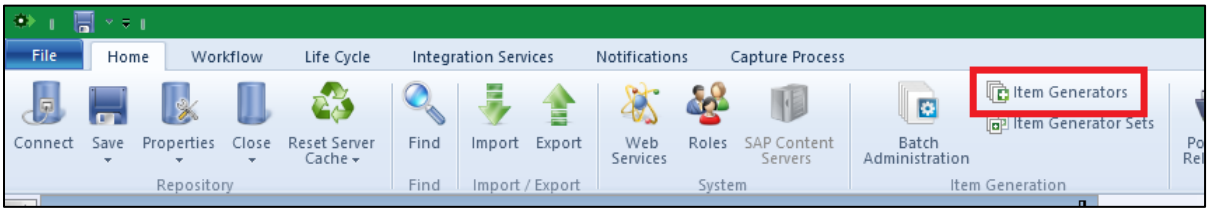
This allows for updated preferred name information to be reflected on existing documents through use of the AFKS importer when the information changes in ICS.

To use the AFKS, assign it to the document type using Configuration. The relevant preferred name keyword type (Student Preferred First Name/Employee Preferred First Name) keyword type will also need to be assigned to the document type (even if the standard student keyword type group is already on the document type).



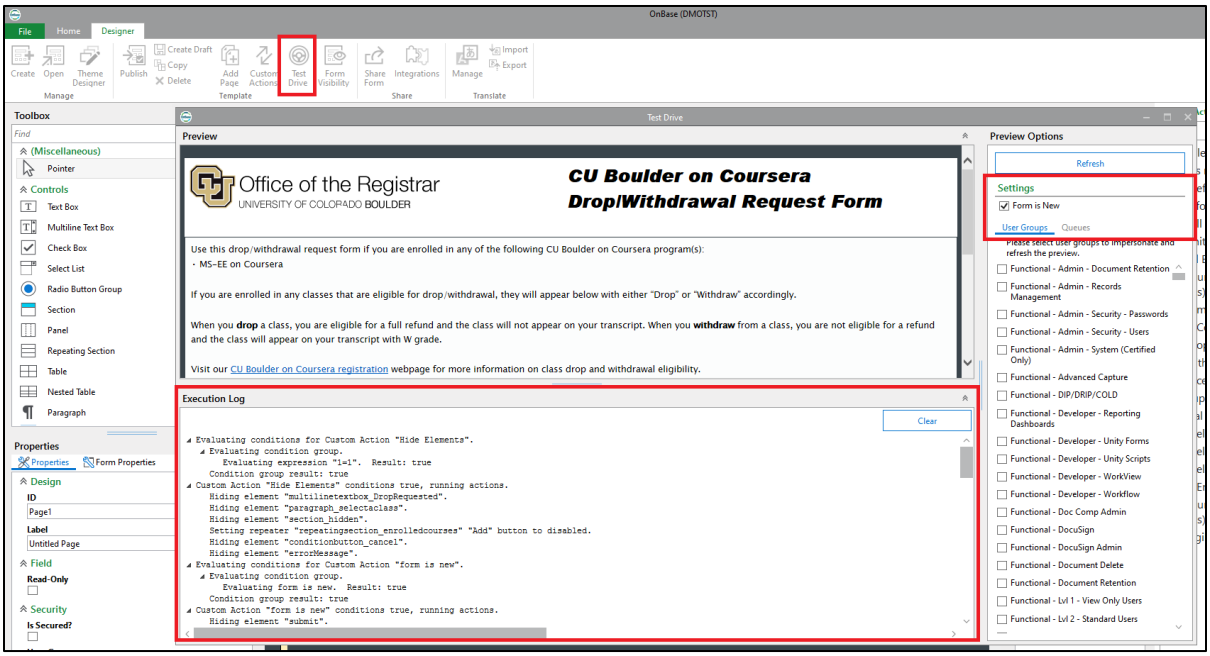
Testing the Solution

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



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

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


OnBase (DMOTST)
File
Home
Designer
Create
Open
Theme Designer
Manage
Publish
Create Draft
Copy
Delete
Add Page
Custom Actions
Template
Test Drive
Form Visibility
Share Form
Integrations
Share
Manage
Import
Export
Translate
Toolbox
Find
(Miscellaneous)
Pointer
Controls
Text Box
Multiline Text Box
Check Box
Select List
Radio Button Group
Section
Panel
Repeating Section
Table
Nested Table
Paragraph
Properties
Properties
Form Properties
Design
ID
Page1
Label
Untitled Page
Field
Read-Only
Security
Is Secured?
Test Drive
Preview
Office of the Registrar
UNIVERSITY OF COLORADO BOULDER
CU Boulder on Coursera
Drop/Withdrawal Request Form
Use this drop/withdrawal request form if you are enrolled in any of the following CU Boulder on Coursera program(s):
- MS-EE on Coursera
If you are enrolled in any classes that are eligible for drop/withdrawal, they will appear below with either "Drop" or "Withdraw" accordingly.
When you drop a class, you are eligible for a full refund and the class will not appear on your transcript. When you withdraw from a class, you are not eligible for a refund and the class will appear on your transcript with W grade.
Visit our CU Boulder on Coursera registration webpage for more information on class drop and withdrawal eligibility.
Execution Log
Clear
Evaluating conditions for Custom Action "Hide Elements".
Evaluating condition group.
Evaluating expression "1=1". Result: true
Condition group result: true
Custom Action "Hide Elements" conditions true, running actions.
Hiding element "multilinetextbox_DropRequested".
Hiding element "paragraph_selectaclass".
Hiding element "section_hidden".
Setting repeater "repeatingsection_enrolledcourses" "Add" button to disabled.
Hiding element "conditionbutton_cancel".
Hiding element "errorMessage".
Evaluating conditions for Custom Action "form is new".
Evaluating condition group.
Evaluating form is new. Result: true
Condition group result: true
Custom Action "form is new" conditions true, running actions.
Hiding element "submit".
Preview Options
Refresh
Settings
Form is New
User Groups
Queues
Please select user groups to impersonate and refresh the preview.
Functional - Admin - Document Retention
Functional - Admin - Records Management
Functional - Admin - Security - Passwords
Functional - Admin - Security - Users
Functional - Admin - System (Certified Only)
Functional - Advanced Capture
Functional - DIP/DRIP/COLD
Functional - Developer - Reporting Dashboards
Functional - Developer - Unity Forms
Functional - Developer - Unity Scripts
Functional - Developer - WorkView
Functional - Developer - Workflow
Functional - Doc Comp Admin
Functional - DocuSign
Functional - DocuSign Admin
Functional - Document Delete
Functional - Document Retention
Functional - Lvl 1 - View Only Users
Functional - Lvl 2 - Standard Users