

System Integration Testing

System Integration Testing (SIT), AKA Integration Testing or System Testing, is the overall testing of all components integrated together to make up the solution

+ SIT Objectives

ONBASE FORM SOLUTIONS

OnBase by Hyland offers a number of Forms Automation solutions, including Unity Forms, Image Forms and HTML Forms. Learn the difference between each and determine which forms best meet your needs, presented by Cailen Myers, Senior OnBase Consultant for RPI Consultants.

Wednesday, April 8, 2020

Presenters: Cailen Myers

+ **OnBase for HR**

- April 15th, 1:00pm CT

+ **OnBase Case Studies & Success Stories**

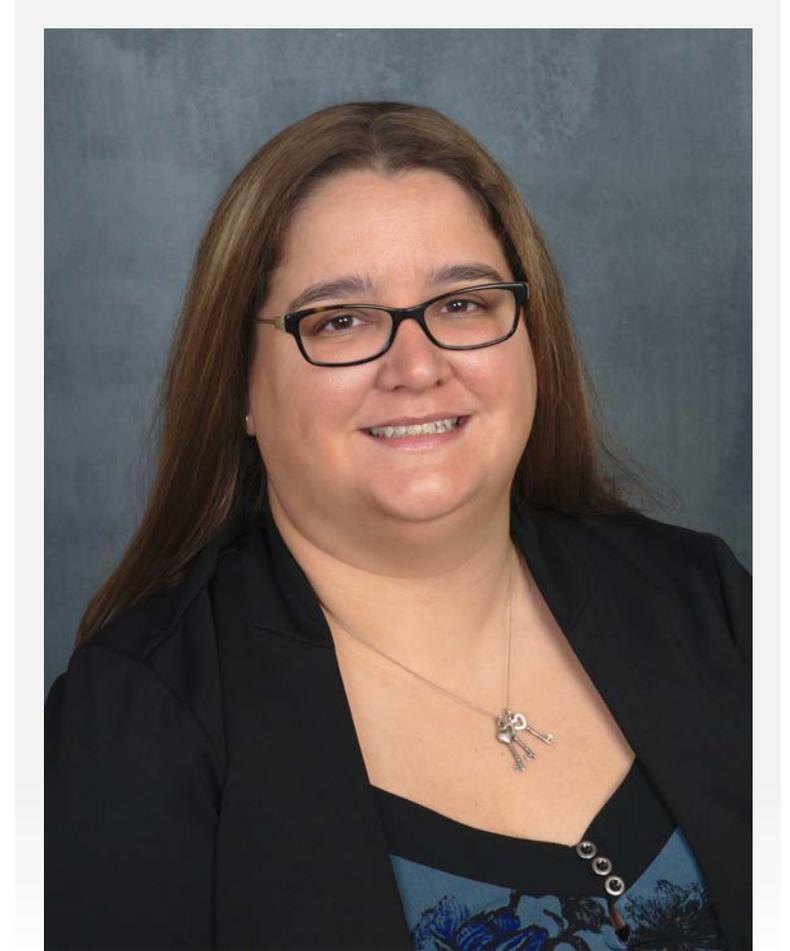
- April 29th, 1:00pm CT

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Cailen Myers

Senior OnBase Consultant

- + 10+ years of experience designing, implementing and supporting OnBase
- + Specialized in Healthcare and EMR/ERP Integration
- + Certifications include: OnBase System Admin, OnBase Advance System Admin, OnBase Workflow Admin, OnBase Advance Workflow Admin, OnBase Support Engineer, EPIC Deficiency Tracking, EPIC Identity, EPIC Release of Information
- + Mom to 3 Siberian Huskies, loves baking and scrapbooking



- + **HTML Forms**
- + **Unity Forms**
- + **Image Forms**
- + **Summary & Questions**

OnBaseTM
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- + **This Webinar is Not Produced or Endorsed by Hyland**
- + **The Information in this Webinar is Current as of March 2020**
- + **The Advice and Content Contained in this Webinar is Educational Only and Based Solely on the Experience of RPI Consultants**



ABOUT HTML E-FORMS

- + E-Forms license
- + External editor to create an HTML form
- + OnBase Client
- + HTML Forms Product Rights

- + Configuring an E-Form is a 4-step process. To configure an E-Form:
 - + 1. Create an HTML form with an external editor.
 - + 2. From the Client module, import the HTML Form into the **SYS HTML Forms** DocumentType.
 - + 3. Create a Document Type or use an existing Document Type that has a Default File Format of **Electronic Form**. Forms can also be configured as a **Virtual Electronic Form**.
 - + 4. Configure the form as an **E-Form** for the Document Type.
- + The following limitations apply when configuring E-Forms:
 - To ensure proper encoding, map all Keyword Types associated with an E-Form's Document Type on the E-Form template. These mappings can be hidden keywords if you do not want all of the Keyword Types displayed on the E-Form.
 - If the HTML Form is a Unicode HTML Form, ensure that the form is imported with an HTML Unicode file type.
 - If using a Cascading Style Sheet for E-Forms in the Web Client, the form creator is responsible for ensuring font accuracy.
 - The Specific Currency Data Type should not be used on documents of type E-Form or Virtual E-Form. This data type is not supported on either of these document types.

- + E-Form templates are written in HTML. HTML code can be written directly in a program such as Notepad®, or in an HTML editor, such as Microsoft Expression Web.
- + E-Form Templates contain input fields that are mapped to document Keyword Types and other system values. E-Forms can also contain information that is not mapped to keywords or stored in the database. This information is stored with the form and is available for viewing, though the system does not search documents based on this text.
- + The following limitations apply when configuring E-Form templates:
 - + • When mapping fields in a form that contain either keyword data or non-keyword data, the "name" attribute must be used in order to store data.
 - + • If you have more than one field with the same name property (e.g. `<input name="Text1" />` and `<input name="Text1" />`), the first instance overwrites the value in any subsequent instances.
 - + • An E-form document will continue to use the HTML template revision that was used when the E-Form was created.
- + Information entered into properly configured form fields is saved as Keyword Values or system values on the E-Form. The most important aspect of forms creation is the proper mapping of form fields to document Keyword Types or system values. For more information, see Mapping Form Fields to Keyword Types on page 12.
- + The method of identifying Keyword Types and system values in the HTML form depends on the HTML editor. In the following example, the map code for the Keyword Type **PO Number** is mapped in Microsoft Expression Web:

- + Before beginning any form field mapping, the form must be created first. Regardless of whether you use a text or HTML editor, all information on the HTML E-Form must be contained within form tags.
- + The form tag must include `<form method="POST">` for the E-Form to submit correctly into OnBase. If this tag is not included, the E-Form's **Submit** button acts as a reset button instead of submitting the form into the database.
- + The following is an example of the correct use of form tags:

```
<html>
<head>
<title>New Page 1</title>
</head>
<body>
<form method="POST">
</form>
</body>
</html>
```

- + Form fields such as text boxes, check boxes, radio buttons, and multiple select boxes can be mapped to Keyword Types. There are two ways to map form fields to Keyword Types:
- + 1. Map the form field to a Keyword Type Number.
- + 2. Map the form field to a Keyword Type Name.
- + In most cases, mapping to a Keyword Type Number is recommended. When Keyword Type Names are used, the renaming of keywords (without a subsequent adjustment to E-Forms) can cause E-Forms to malfunction. Keyword Number mapping is effective when Keyword Type names contain characters that are not accepted by HTML.
- + Mapping to a Keyword Type Name is recommended only if forms must be imported into multiple databases. Keyword Numbers cannot be changed in the system. If a form that uses Keyword Numbers is imported into multiple databases, all form field properties must be changed to map to the Keyword Numbers in the new database. Additionally, if the Keyword Type name contains a character that cannot be used in an HTML attribute without being escaped, the Keyword Type number should be used instead.

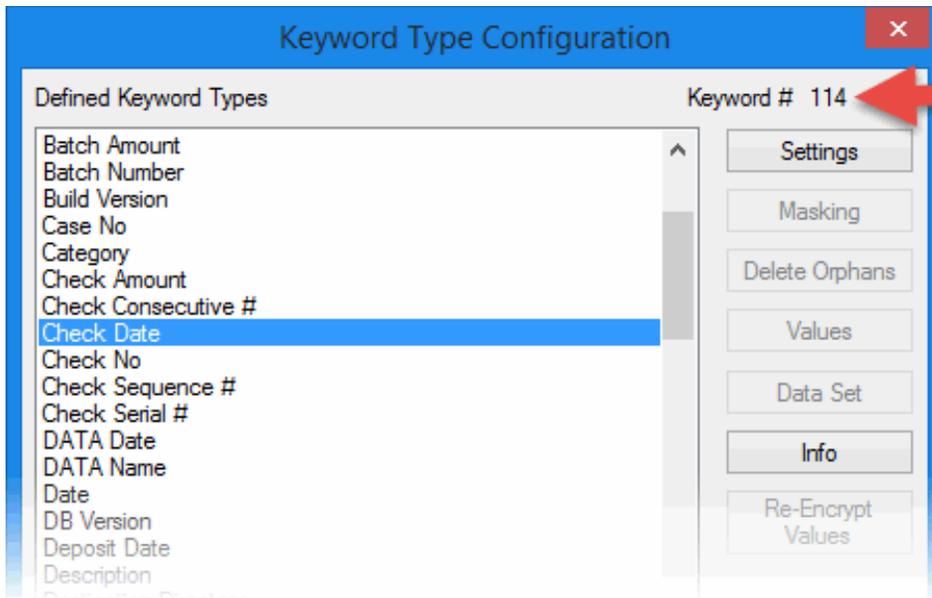
+ **Limitations When Mapping Form Fields to Keyword Types**

+ The following limitations apply when mapping form fields to Keyword Types:

- + • The E-Forms module does not support mapping Keyword Types that belong to Multi-Instance Keyword Type Groups to radio buttons. Keyword Types belonging to Multi-Instance Keyword Type Groups can be mapped to text boxes, scrolling text boxes, or multiple select boxes. There is limited support for mapping Keyword Types that belong to a Multiple Instance Keyword Type Group to check boxes. Keyword Types that belong to a Multiple Instance Keyword Type Group that are mapped to multiple check boxes on an E-Form must be configured with the same value within the HTML code. The value assigned will determine whether the check box is selected or deselected. For example, if the value used is “on,” the check box will only be selected when the Keyword Type value is “on”. All other Keyword Type values will leave the check box deselected.
- + • When using standard Keyword Type Groups, using check boxes to allow multiple values to be selected for a single Keyword Type within the Keyword Type Group is not supported. If you need to provide the possible options that a user can select, radio buttons or single select lists can be used. • Configuring Keyword Types on a form that are not assigned to the Document Type the E-Form belongs to is not supported.
- + • To stay within the maximum number of characters allowed for a Keyword value and avoid truncated values, you should either implement a **maxlength** attribute on the input field corresponding to the maximum Keyword length or use JavaScript to check if the field value length is greater than the maximum length of the associated Keyword and display a message if the value is going to be truncated.
- + • In the Core-based interfaces, Keywords with underscore characters (_) are treated as spaces. This has implications for filtering. If a system contains two Keywords configured as Keyword A and Keyword_A, both of them would be mapped as Keyword_A. If both Keywords are configured on a filter, the system will choose one randomly to filter with. In the OnBase Client, the underscore character (_) is reserved for HTML. If a Keyword Type name contains an underscore, it must be mapped as a Keyword Type Number.
- + • When importing HTML documents into the system to be stored as a Document Type (not using them as E-Forms), be aware of fields mapped to OBKey formats, as form objects containing OBKey formats are controlled by Keyword values. When items need to remain static and are not dependent upon Keyword values, do not map fields as Keywords or to OBKey formats. For example, if an HTML document contains check boxes that are selected, importing the document into the system may clear the check boxes if they are mapped using OBKey formats and the Keyword Values do not validate the selections.
- + • Each field within an E-Form must have one unique Keyword Type assigned to each field if using a Keyword Type Group. Multiple instances of the same Keyword Type are not supported in E-Forms for Keyword Type Groups.

Keyword Type Number

- + Format:
OBKey_KeywordNumber_#



Keyword Type Name

- + Format: **OBKey_Keyword_Type_Name_#**
- + The following limitations apply when configuring the Keyword Type Number format:
 - Any codes used to map Keywords, including the Keyword name itself, are not case sensitive.
 - When using a currency Keyword Type, the E-Form formats currency according to the user locale (upon submission of the E-Form), unless a format for the currency has been applied to the Keyword Type during configuration.
 - Due to the way Internet Explorer renders multiple, continuous spaces, Keyword Values entered on an E-Form are stored with a single space in the place of any multiple, continuous spaces that are entered. For example, if a value of Sarah_ Adams (where " " represents a space) is entered on an E-Form, the value Sarah_Adams is stored. Do not put Keyword Types (including those that use Data Sets) that must store multiple, continuous spaces on an E-Form.

- + **Signing E-Forms**
- + **Added to Reading Groups in Document Knowledge Transfer**
- + **Workview**
- + **Custom Queries**

ABOUT UNITY FORMS

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.

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+ **Unity Client Licensing**

+ **Browsers:**

- Microsoft Internet Explorer 11
- Microsoft Edge (EdgeHTML 16 and greater)
- Google Chrome 74 and greater
- Mozilla Firefox 60 and greater
- Apple Safari 11.0 and greater

1. Create a Document Type to associate with the form template.
2. Configure User Rights for Unity Forms.
3. Access the Designer.
4. Create the form template.
5. Configure form security.
6. Publish the form template.

+ Demo

ABOUT IMAGE FORMS

Image Forms provides the ability to capture data onto a scanned version of a regulated form by leveraging Unity Forms architecture and rendering the image form with fillable fields. The Forms Designer in the Unity Client provides a point-and-click interface for mapping fillable field elements to the Image Form.

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- + Image Forms License
- + Unity Client License
- + Browsers:
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 - Microsoft Edge (EdgeHTML 16 and greater)
 - Google Chrome 74 and greater
 - Mozilla Firefox 60 and greater
 - Apple Safari 11.0 and greater

1. Create a Document Type to associate with the form template.
2. Configure User Rights for Image Forms.
3. Access the Designer.
4. Create the form template.
5. Configure form security.
6. Publish the form template.

+ **Demo**

SUMMARY & QUESTIONS

OnBase by Hyland offers a number of Forms Automation solutions, including Unity Forms, Image Forms and HTML Forms.

Thank you for attending #WebinarWednesday with RPI Consultants and our 2020 OnBase Webinar Series. Find this webinar recording and all previously recorded webinars online at www.rpic.com/webinars.

- + **HTML Forms**
- + **Unity Forms**
- + **Image Forms**
- + **Summary & Questions**

The logo for OnBase by Hyland features the word 'OnBase' in a large, bold, teal sans-serif font, with a small 'TM' trademark symbol to its upper right. Below 'OnBase', the words 'by Hyland' are written in a smaller, green, lowercase sans-serif font.

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