## OnBase Quick Reference Guide Submitting Content – Unity Client

Content can be imported to OnBase using a number of methods. Use this Submitting Content – Unity Client to learn how to import content using the Unity client installed on a Windows PC.

To install the Unity client, refer to the <u>OnBase Web URLs and Unity Client ClickOnce</u> <u>URLs</u>.

Batch Scanning is covered under the <u>Scanning Documents Quick Reference Guide</u> (<u>QRG</u>) and must be done using the Unity client. Refer to that guide to learn how to scan batches of documents or sweep multiple documents into OnBase from network directories.

The <u>Submitting Content – Web Client QRG</u> details importing content using the OnBase Web client.

## Importing documents

Perform the following steps to import a document using the Unity Client on a Windows PC.

1. Login into the Unity Client with your campus credentials.

First, select your campus. Depending on the size of the window, you may see campus names only or the campus names along with pictures. Single click on campus names or double click if the picture is displayed.



G MyCU - University of Colorado		×
University of Colorado Boulder   Colorado Springs   Denver   Anschutz Medical Campus		
Select your campus for authentication:		
Boulder IDP		
Denver IDP		
Colorado Springs IDP		
System		

Single click to select the desired campus.

HyCU - University of Colorado		<u></u>	×
	University of Colorado oulder   Colorado Springs   Denver   Anschutz Medical Campus		
Select	your campus for authentication:		
Boulder IDP	Denver IDP		
Colorado Springs IDP	System		

Double click to select the desired campus.

Enter your campus credentials. For assistance with your campus credentials, refer to the links on the login page for your campus.

2. Click **Import** on the Home tab at the top of your screen.



Page → → Queries Cabinets → My Checkouts									
Home Personal Favorites Page + + + + + + + + + + + + + + + + + + +	File	Home							
Eavorites Documents Create			*	<b>Q</b> Retrieval	🖃 File	Query History	୍ଲି Certified Records	1mport Create	Templates

- 3. Choose the file(s) to import. You can either:
  - a. Click **Browse** on the Import tab of the menu, and select the document you want to upload.

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File	Home	Imp	ort						
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Browse	Acquire	Import	Cancel	Move Up	Move Down	Remove	Remove All	Rotate Left	Rotate Right
Im	port	Imp	oort			Pages		Trans	forms

- b. Drag and drop files.
- 4. Select the appropriate **Document Type Group** from the top drop down menu.

Document Type Group 🛛 🚽 💳	_
<all></all>	~
Document Type	
	~
File Type	
Image File Format	~
Document Date	
02/12/2018	23

5. Select the appropriate **Document Type** from the second drop down menu.



Import	
Document Type Group	
X - CAD - Cross Area Documents	~
Document Type 🔫	
	~
File Type	
Image File Format	~
Document Date	
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6. The appropriate file type will be filled automatically based on the file selected for import. **Never change the file type!** Doing so will cause a corrupted import and the document will not be viewable in OnBase.

Document Type Groups		
Document Types		~
		~
		_
File Type MS Word Deers with doc)		~
File Type MS Word Doorsent (.doc)	5	~

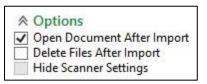
7. Enter keyword values. These values will be used to retrieve the document in a search. Keyword fields labeled in red are required in order to import the document.

Many document types are configured with an autofill keyword set which will fill values like name and date of birth based on student or employee ID, for example. After entering the primary value, use tab to expand the autofill.

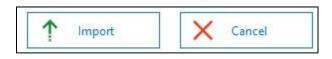


Keywords	4 ×
Student ID	
First Name	2
Middle Name	
Last Name	
Date of Birth	53
	•
Campus Code	
	*

8. Select **Options** as necessary.



9. Click the **Import** button at the bottom (or on the Import tab of the menu) to upload to OnBase.



10. Your document is uploaded and indexed and can be retrieved within OnBase.

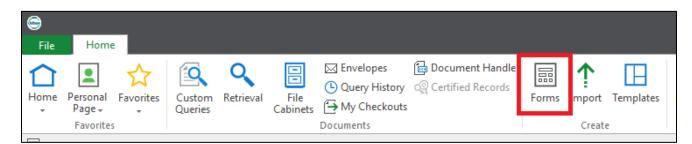
File         Document         Image           Image         I
Information Actions Notes

## **Submitting Unity Forms**

Perform the following steps to create a document by submitting a Unity form in the Unity client.



1. Click **Forms** on the Home tab of the menu.



2. Choose the desired form from the list at the left.



3. Fill all applicable form fields. Required fields are marked with a red asterisk (\*). Please note that forms are interactive and may change as you complete the form.

Departmental Information	
Campus *	Department *

4. Click the **Submit** button to save the form to OnBase.



