Access the End-User Help Files

The Unity Client includes help files for end-users. These can be referenced at any time in the Unity Client either by pressing the **F1** button on your keyboard, or by clicking the **Help** button:
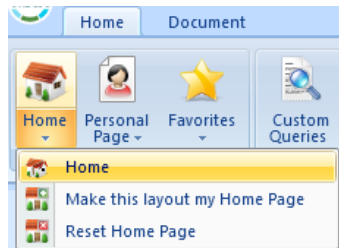

The help files are opened in a separate window.

Set Your Home Page

The **Home** button takes you to your configured **Home Page**.

To set a layout to be your Home Page, navigate to the desired layout and select **Make this layout my Home Page** from the Home button drop-down menu.

To reset your Home Page to the default, select Reset Home Page from the Home button drop-down menu.

Add Favorites

You can add the currently displayed layout to your list of favorites by performing the following steps:

1. Click the **Favorites** button:
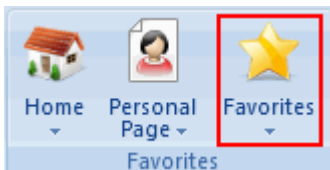
2. Click **Add this layout to my favorites**.

   The favorite can be accessed by clicking the Favorites button again and selecting the favorite from the list.

Use the Personal Page

Many OnBase items and layouts can be added to your Personal Page as tiles. Tiles serve as easy access points to the files, items, and interfaces of your choice.

The Personal Page can be opened by clicking the **Personal Page** ribbon button:

Use the Personal Page (Continued)

To add an item or layout to the Personal Page, right-click the object and select **Add To Personal Page**. If the right-click option is unavailable, the Personal Page option may be included under the **Send To** functions or, as is the case with Custom Query results, as a special menu option to **Add to Personal Page**.

When adding an entire layout to your Personal Page, select **Personal Page | Add this layout to my Personal Page** from the ribbon menu.
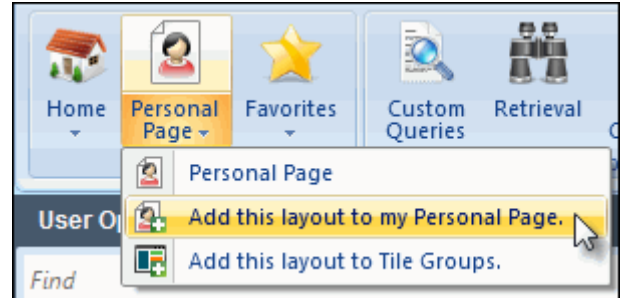
Document Retrieval

You can retrieve documents in the Unity Client based on the document's keyword values, the text contained within the document, or the note information contained on a document. The following example describes how to retrieve documents based on their keyword values.

To access Document Retrieval:

1. In the **Documents** ribbon group on the **Home** tab, click **Retrieval**.

2. In the **Document Retrieval** pane, select a **Document Type Group**.

   Select a **Document Type**.

Note: The information contained in the panel may dynamically change based on the Document Type Group or Document Type you selected.

3. If desired, you can specify a date range to only return documents that were created or imported between a certain range of dates.

4. A list of keyword fields displays below the date range.

Enter values for the keywords that are displayed. You can enter as much or as little information you know.

Note: Some searches require you to enter at least one keyword value. Search requirements are determined by your system administrator.

5. When you have entered all search criteria, click the **Find** button at the bottom of the panel.

Document Retrieval (Continued)

The **Search Results** are displayed in a list on the right side of the screen.
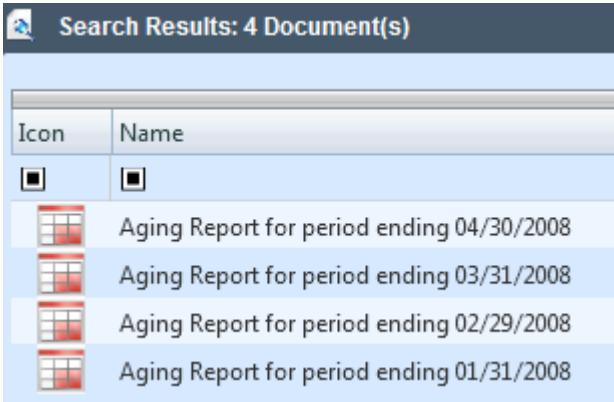
6. Double-click a document from the list to open it.

Upload Documents

To import documents in the Unity Client:

1. In the **Create** ribbon group on the **Home** tab, click **Upload**.

The **Upload** layout is displayed.

2. Select the document you want to import by doing one of the following actions:

   - Browse to the file location of the document you are importing by clicking the **Browse** button,
   - Scan a document, or import a document image from another supported digital storage device such as a scanner or camera, by clicking the **Acquire** button,
   - If configured, select a document stored or created in Google Drive by clicking the **Drive** button, or *
   - Drag and drop the file you want to import into the white space next to the **Upload** panel.

3. Select a **Document Type Group** for the document.

   Select a **Document Type** for the document.

4. Enter all of the necessary keyword values in each field.

5. When you are finished entering the necessary keyword values, click the **Upload** button to import the document into OnBase:

*Please note that Google Drive is not configured for University of Colorado.

Document Separation

Image and PDF documents can be manipulated in the **Document Separation** layout. Documents and their individual pages can undergo multiple editing processes in this layout such as splitting, joining, rotation, and copying. Documents can be deleted or created within Document Separation. Pages can be dragged to different documents, or to an empty area to create a new document.

To send one or more documents to Document Separation, select **Split** from the **Re-Index** pane, the **Document Separation** button in the **Image** tab of an open document, the **Send To | Document Separation** option from the ribbon or right-click menu, or drag and drop the document(s) into an existing Document Separation window.

To switch between **Document Display Mode** and **Page Display Mode**, toggle the **Group by Documents** button:

Keep important pages separate while reorganizing and editing documents by dragging them to the **Page Holder**.

Double-click a page to open it in **Detailed View**, which allows for full-scale viewing, rotation, and flipping.

Click **Join** to join two or more documents through the **Merge Documents**, **Join Pages,** or **Append After Page** options.

Click **Split** to separate a document through the **Split** or **Break into Documents** options.

The thumbnails within Document Separation can be adjusted by accessing the **Thumbnail Settings** from the ribbon menu.

Envelopes

Envelopes are collections of documents that you can compile and share with other OnBase users. Any document can be put into an envelope, regardless of content or Document Type.

Documentation Department

Envelopes (Continued)

Envelopes can be created and viewed by clicking the **Envelopes** ribbon button on the **Home** tab.

Select an envelope to view its contents.

If you would like to share an envelope with other users, select the desired envelope and click **Share Envelope**.

Selected Users are the users sharing the envelope with you. Users can have **Full Control** over the envelope, can be permitted to **Add to Envelope** and/or **Remove from Envelope**, or can just be allowed to view the envelope contents. Adjust user permissions as needed.

User Options

System functionality and appearance can be customized in the **User Options**. The User Options dialog is accessed through the **User Options** button in the **Application Menu**.

General Unity Client behavior and display features, **Document** display options, **Document Upload** options, **Printing** options, **Retrieval Date** options, and **Service Mode** options can be set here.

Note: The Service Mode tab is only available when the Unity Client is running in Service Mode.

Note: Some User Options may be enforced by an administrator designated **User Option Policy**.

To apply User Options:

1. Select the desired options in each tab. Selection controls for options vary (check boxes, text fields in which you can insert a number or date range, etc.).
2. After you have selected the appropriate options, click **Save** to save your changes and to close the User Options dialog.

Generate CSV Files

Document Search Results lists can be exported as .csv files. CSV files can contain metadata pertinent to the documents included. Keywords, DocPop URLs, and Document Dates are examples of information fields that can be included in your CSV output.

Note: CSV files cannot be generated from Full Text Search result lists.

Generate CSV Files (Continued)

To generate a CSV file:

1. Right-click within a Document Search Results list and select **Generate CSV File.** The **Generate CSV File** window is displayed.
2. Configure your file as desired.The document **Range** and resulting **Columns** within the CSV file can be adjusted here.
3. In the **Save to File** field, enter the name and location that will be used to save the CSV file. You can select **Browse** to navigate to the correct location.
4. Click **Launch Associated Application** if you would like to view the CSV file after you click **Generate**. The file will be opened by your default CSV application.
5. Click **Generate**. The CSV file has been created at the specified location.

   Or click **Cancel** to cancel the process and return to the search results list.

Send Mail

Internal mail messages can be sent to other OnBase users. Documents and folders can be sent within the Unity Client to other users. If you need to send documents to non-OnBase users, external mail messages can contain documents as attachments, or can include documents, folders, Custom Query Results, E-Forms, and Unity Form Creation pages as **Unity Pop Links** or **Unity Pop Files**. Recipients of Unity Pop Links and Files must be OnBase users.

Send To | Internal User

Selecting this option will allow you to send the selected or open document or folder to another OnBase user. A new mail message dialog is displayed and recipients, attachments, and message body text can be edited as needed.

Received internal mail messages can be checked by clicking the **Mailbox** button in the ribbon menu.

Send to | Mail Recipient

Selecting one of the two Mail Recipient options will allow you to send the selected or open item to a user outside of OnBase.

Note: A functional, supported email client is required to send OnBase items externally.

Selecting **Send to | Mail Recipient (as Attachment)** will attach the document(s) to a new message dialog in your configured external email client.

Selecting **Send to | Mail Recipient (as Link**) opens a blank email message containing a link to the item(s) or XML file that references the content in OnBase, depending on your configuration.

Documentation Department

Document List Organization

Document lists can be organized to better suit your needs. Lists can be organized through grouping, sorting, column reordering and stacking, and filtering through operators and drop-down lists.

Grouping

Drag a column heading to the space above a data list to group the list by that column.
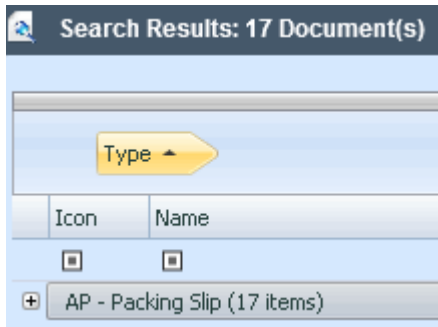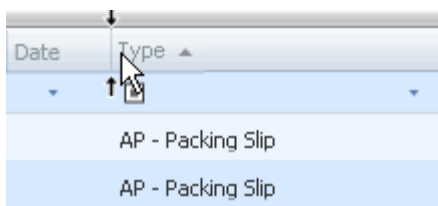

Sorting

Lists can be sorted by column values. Click on a column heading to sort the list in descending order. Click the column heading again to sort in ascending order.

Reordering and Stacking Columns

Click and drag a column to the area between two columns to move it to that location:

Click and drag a column onto the header of a different column to stack the columns:
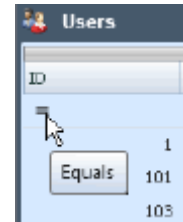

Document List Organization (Continued)

Filtering

The Custom Queries, Document History, Document Retrieval, Mailbox, and Users layouts support filtering. Operators, drop-down lists, and custom filters are available methods of list filtering.

Click the operator button in the desired column to view available operators:

Click the drop-down list arrow to view available drop-down list options:

Note: Operator and drop-down list options vary by column.

Select **Custom** from a drop-down list to open the **Custom Filter Selection** dialog box. You can create your own data list filter using conditions and operators.