



# ONBASE 16 UNITY CLIENT

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*QUICK REFERENCE GUIDE*

December 21, 2017

Version: 1.2

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## Overview

This document is intended to be a quick-access reference guide to essential functionality of the OnBase 16 Unity Client. For more in-depth reference information, please refer to *Additional Reference Information* section located at the bottom of this document.

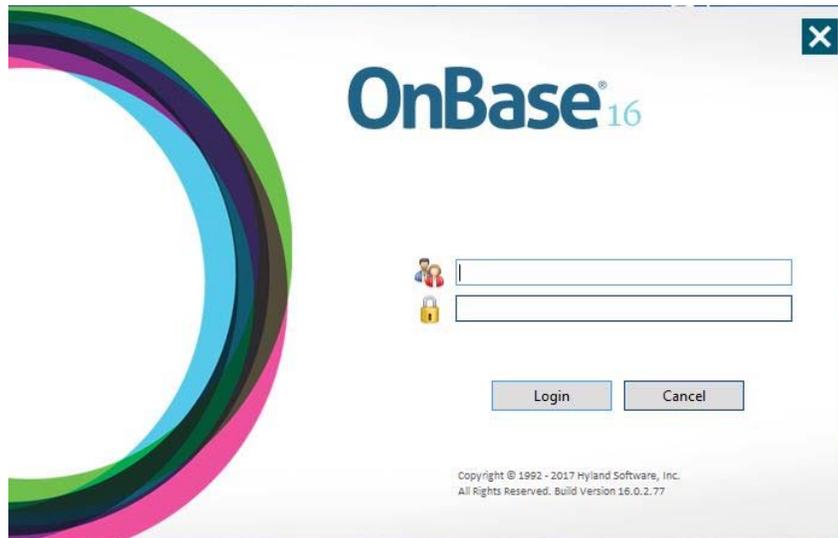
## Using the OnBase 16 Unity Client

### Logging in to the Unity Client

1. Double-click on the “Hyland Unity Client” shortcut on your desktop.



2. The login prompt below will pop up.



3. Enter the user name in the following box:



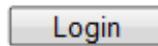
The image shows a user name input field. It consists of a small user icon on the left and a rectangular text box on the right.

4. Enter the password into the following box:



The image shows a password input field. It consists of a small lock icon on the left and a rectangular text box on the right.

5. Click on the “Login” button.



6. If successful, the Unity Client will open and will look similar to the image below.



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**Note:** The buttons in the upper area of the screen, where the Ribbons bar is located, may appear greyed out, or missing altogether, depending on your user rights.

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**Note:** The Unity Client will run continuously in the Windows System Tray after double-clicking and/or logging in.

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## Changing Your Password

The OnBase application is currently not integrated with the University’s authentication system, i.e. CAS, and maintains its own password system. New users are prompted to change their temporary passwords the first time they log in to OnBase. However, if you are an existing user, you can change it at any time.

1. Click the **OnBase Application Menu** button in the upper left-hand corner of the screen.



2. Select **Change Password** from the menu



3. Enter your old password and your new password and click **OK**.



Please enter a new password.

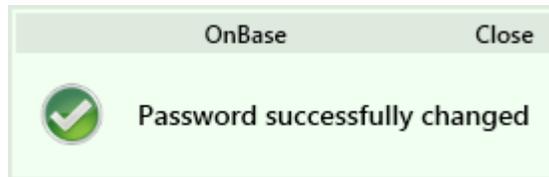
Old Password

New Password

Verify New Password

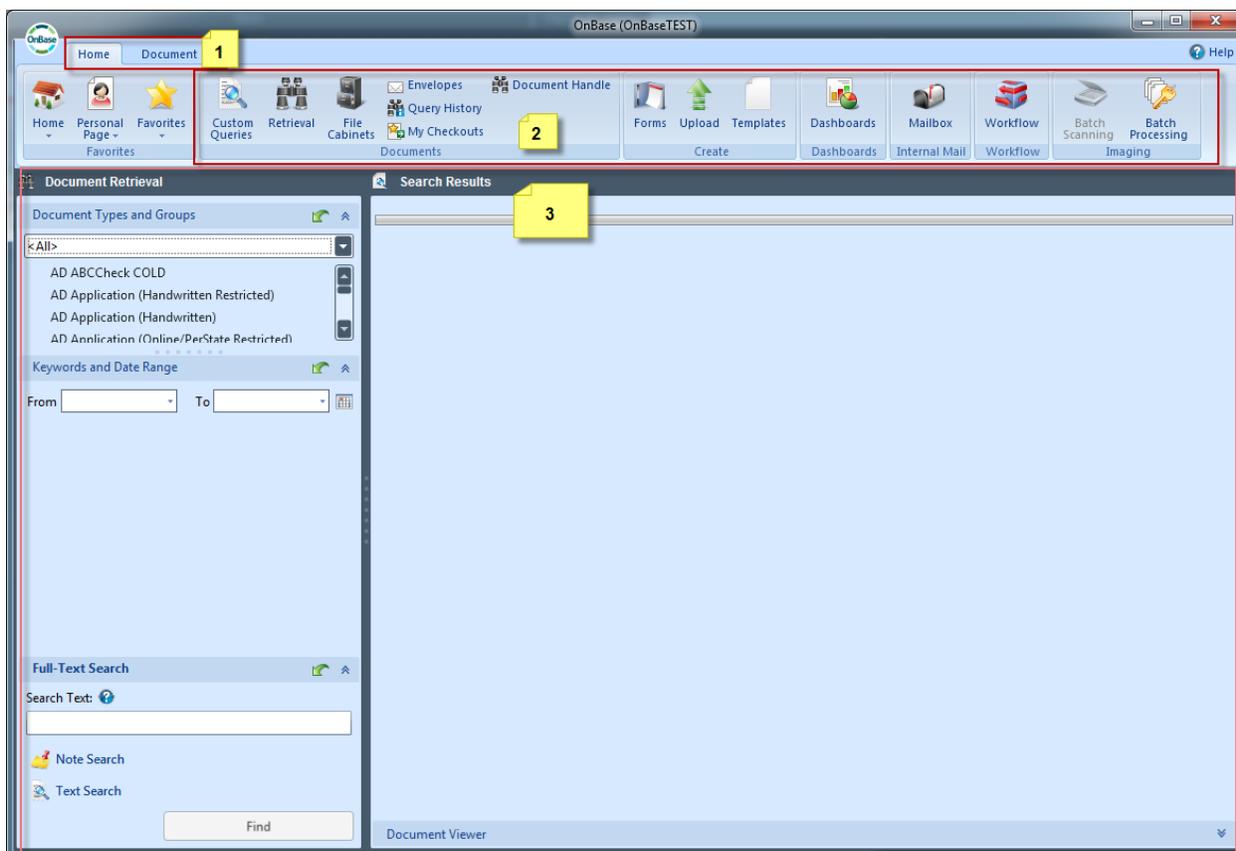
OK Cancel

4. A message appears near the System Tray to indicate that you have successfully changed your password.



### The Unity Client Window

The Unity Client window has 4 primary regions: Tabs, Ribbon, Layout, Task Pane. The screen shot below shows 3 of the 4 regions (the fourth is not shown, intentionally).



## Tabs

You can use tabs to navigate between different layouts in the Unity Client, i.e. Document, Workflow, Dashboards, etc. Tabs are displayed at the top of the Unity Client window, shown in the highlighted area to the left of the # 1 above.

## Ribbon

The contextual ribbon, shown in the highlighted area beneath the # 2 above, displays available user actions based on the currently displayed layout. A ribbon is displayed by clicking on the corresponding tab. Each ribbon is divided into individual ribbon groups.

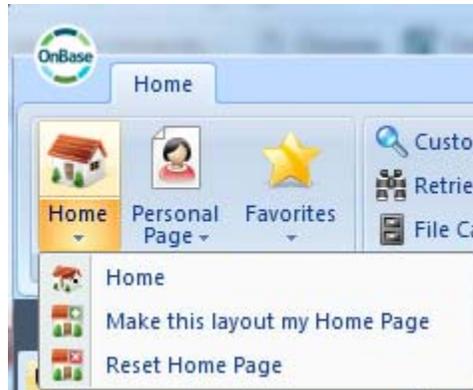
## Layout

Each screen in the Unity Client is a layout. For example, **Document Retrieval**, **Custom Queries**, and **Workflow** are some of the more commonly used screens.

## Home Layout

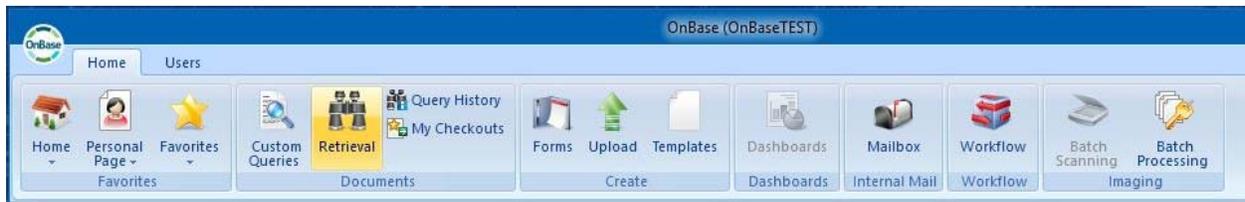
When the **Home** tab is selected, the layout that you have configured as your Home Page is displayed. You can change what you see as your home page by clicking the drop-down and

selecting **Make this layout my Home Page**. You can return to the default home page at any time by selecting **Reset Home Page**. Selecting **Home** takes you to your **Home Page** layout.



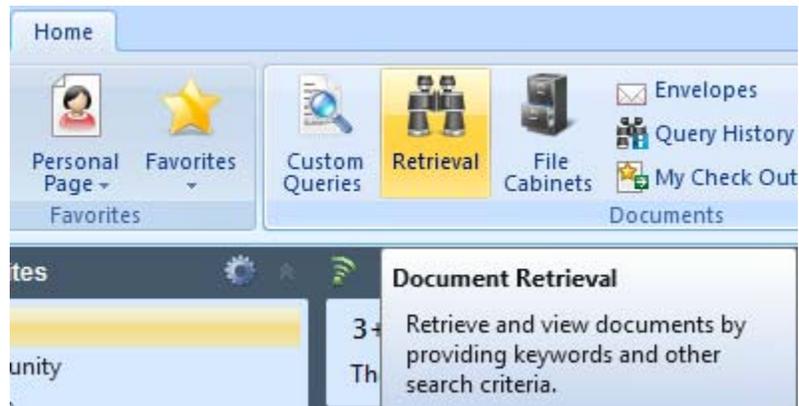
## Unity Contextual Ribbon

As state above, the contextual ribbon contains buttons for all available user actions based on the displayed layout. The **Home** tab displays the buttons that open up the most common functionality such as **Custom Queries** and **Retrieval**, and based on your solution/licensing other modules such as **Workflow**. Click on any of the respective buttons to access the desired functionality.



## Document Retrieval

In order to search for and find documents, you must open the **Document Retrieval** layout. Click the **Retrieval** button in the **Documents** ribbon group.

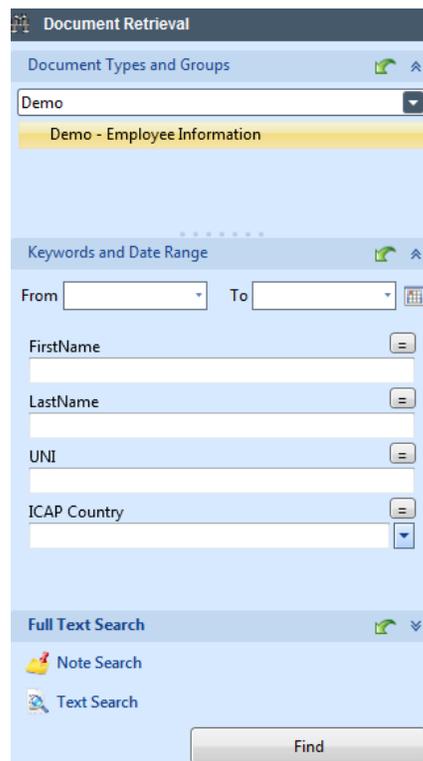


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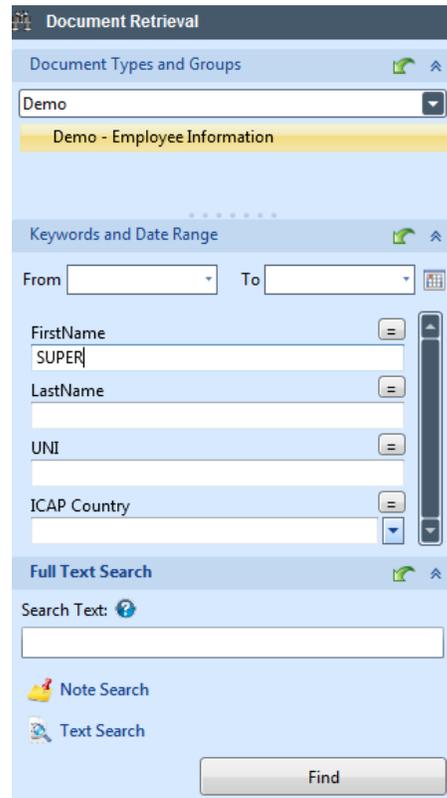
**Note:** For more detailed information about Document Retrieval in the Unity Client, the **Unity Client Module Reference Guide (MRG)** or Lesson 2 in **Hyland Software End User Training: OnBase 16 Unity Client**. A link to the MRG and training can be found in the Training Resources section of this document.

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1. After opening the Document Retrieval module, select a **Document Type Group** and a **Document Type** that you would like to retrieve.

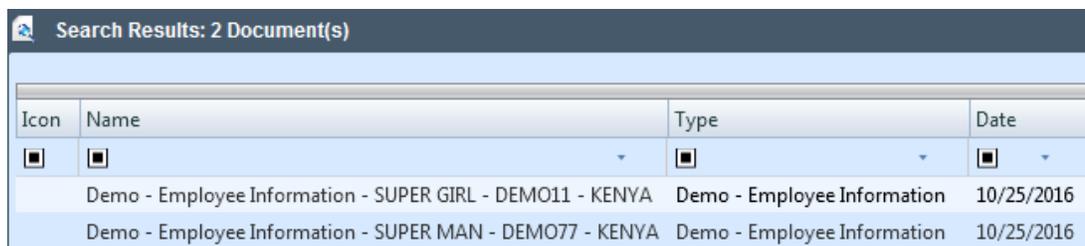


2. Enter a **Keyword** or **Date Range** to refine your search and click on the **Find**.



The screenshot shows the 'Document Retrieval' window. It has three main sections: 'Document Types and Groups' with a dropdown menu set to 'Demo'; 'Keywords and Date Range' with 'From' and 'To' date pickers, and several text input fields for 'FirstName' (containing 'SUPER'), 'LastName', 'UNI', and 'ICAP Country'; and 'Full Text Search' with a 'Search Text' input field. At the bottom, there are 'Note Search' and 'Text Search' icons, and a 'Find' button.

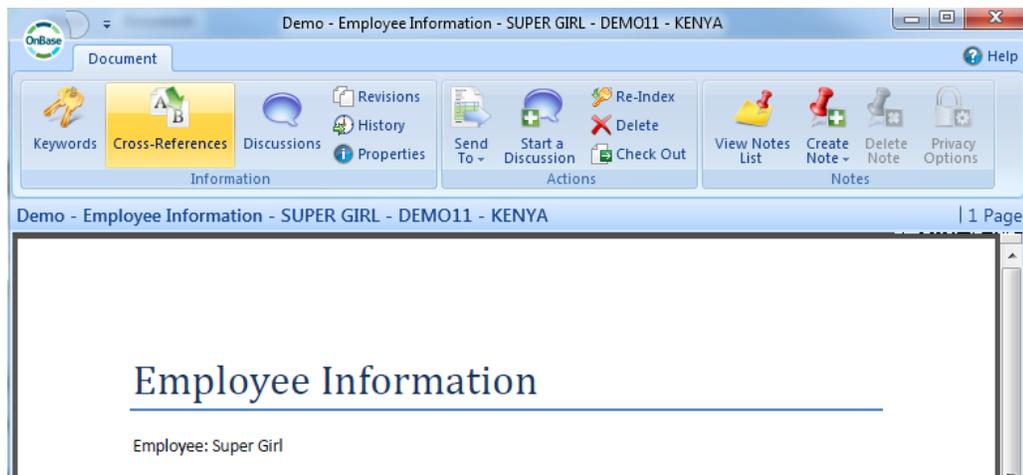
3. The returned Search Results are listed in the **Search Results** pane populates, as shown below.



The screenshot shows the 'Search Results: 2 Document(s)' pane. It contains a table with the following data:

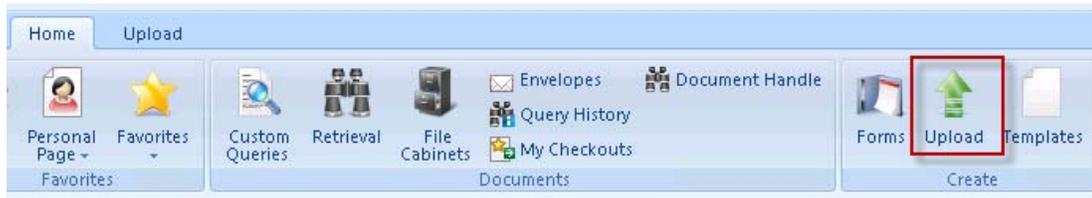
Icon	Name	Type	Date
	 Demo - Employee Information - SUPER GIRL - DEMO11 - KENYA	 Demo - Employee Information	 10/25/2016
	 Demo - Employee Information - SUPER MAN - DEMO77 - KENYA	 Demo - Employee Information	 10/25/2016

4. To open a document, double-click the document name to view the document in the **Viewing** pane. Depending on your settings and the type of document you are opening, the document may open in a reading pane or in a separate window.

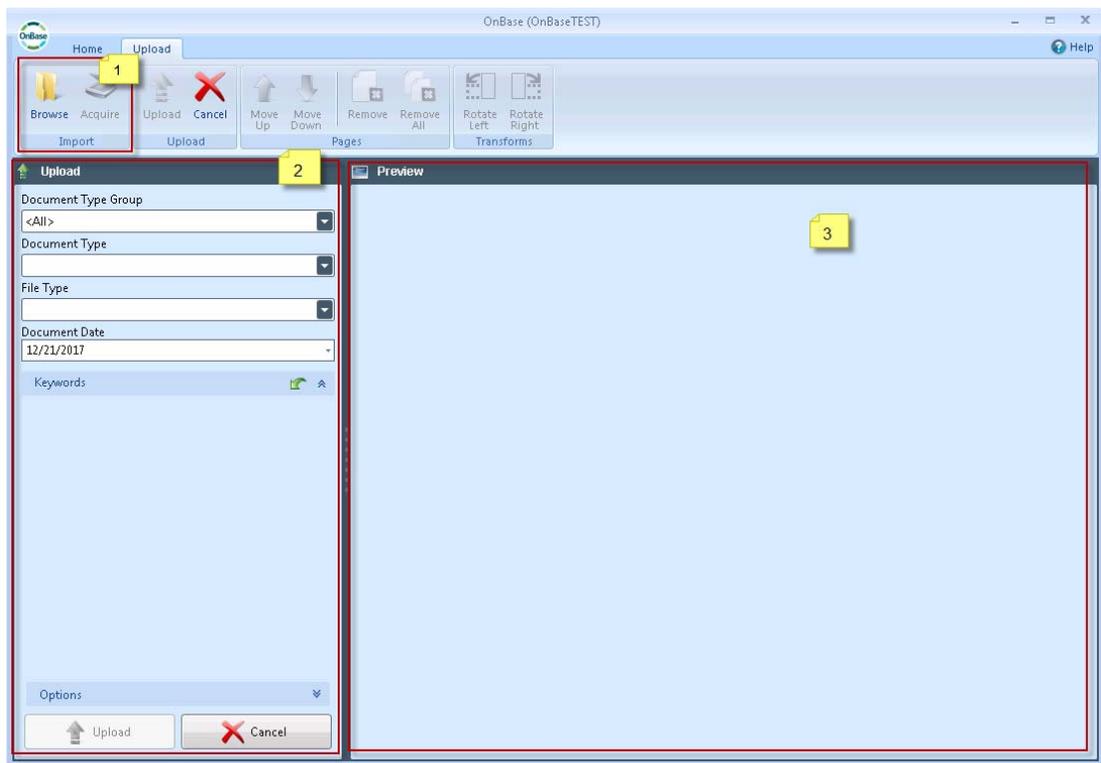


## Uploading Documents

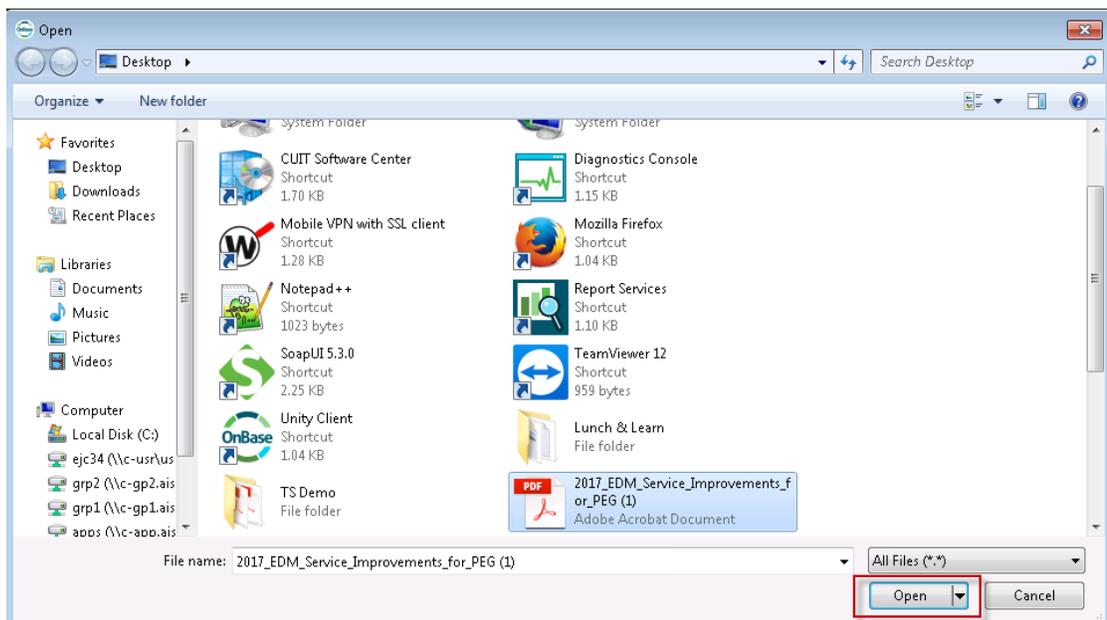
OnBase provides various methods to import documents in OnBase. The first method is to use the **Upload** functionality directly in the Unity Client, which allows you to import a document stored locally on your machine or on a network share. To use the functionality, click the **Upload** button in the **Create** ribbon group.



1. After clicking the **Upload** button, the **Upload** layout will open up.



2. Click on the Browse button to locate the document you wish to import to OnBase. Select the document and click “Open”.



3. A preview of the document will be displayed in the “Preview” pane, shown in the highlighted area marked with the # 3 above, of the Import layout.

4. Index, i.e. specify what the document is and who the document belongs to, in the “Upload” pane, shown in the highlighted area marked with the # 2 above.
5. Select the appropriate “Document Type Group” from the available pull down.
6. Select the appropriate “Document Type” from the available pull down. Note that the keywords associated to the selected Document Type will be displayed in the Keywords section of the Upload pane.
7. The “File Type” of the selected file will be automatically detected by OnBase.
8. The “Document Date” is prepopulated to the current date, but it can be changed if you would like to do so.
9. Fill out the appropriate keywords.
10. Click on the “Upload” button.

## Workflow

To use the Workflow module, you must open its layout. Click the **Workflow** button in the **Documents** ribbon group.



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**Note:** The **Workflow** ribbon button may not be available to you, depending on your respective Department’s solution.

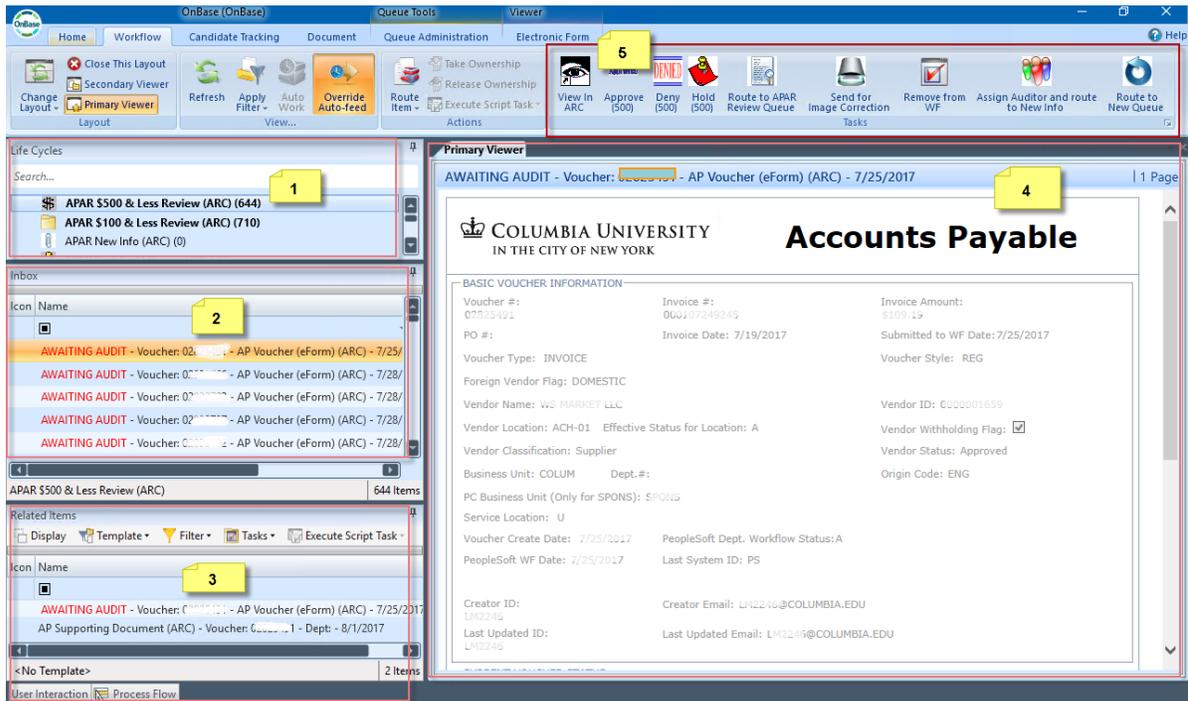
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After opening the Workflow module, you may see the ‘classic layout shown below. The Workflow module has 5 primary regions: Lifecycle View, Workflow Inbox, Work Folder, Viewing Pane, and Task Ribbon.

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**Note:** If the Workflow layout does not resemble the one displayed below, or if your layout

changes in any way, you will have to change your layout or reset it altogether. Please see instructions on changing your layout below.



### Lifecycle View

The Lifecycle View pane, shown in the highlighted area marked with the # 1, shows the list of Lifecycles and Workflow Queue that you have access to. Clicking on the plus (+) sign next to a Lifecycle will expand the list of Queues you are able to view.

### Workflow Inbox

The Workflow Inbox pane lists all document in a respective queue that you have access to or may have assigned to you, depending on the queue configuration. The pane is highlighted with the # 2.

### Work Folder

The Work Folder pane lists all supporting document associated with the document selected in the Workflow Inbox above. The pane is highlighted with the # 2.

### Viewing Pane

The Viewing Pane, highlighted with the # 4, displays the document selected in the Workflow Inbox.

### Task Ribbon (ad-hocs)

The Task Ribbon displays all ad-hoc tasks assigned to a workflow queue that you have access to. Ad-hoc tasks are actions that users can perform on a selected document in the Workflow inbox. The ad-hocs tasks are highlighted in the area marked with the # 5.

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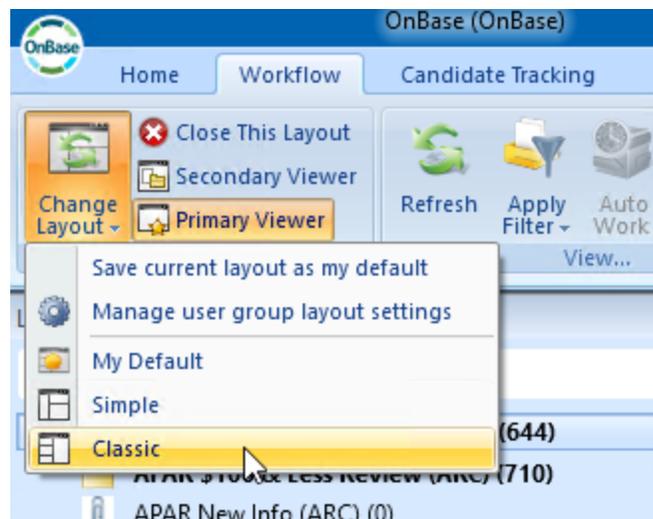
**Note:** For more detailed information about Workflow module in the Unity Client, the **Unity Client Module Reference Guide (MRG)** or Lesson 24 in **Hyland Software End User Training: OnBase 16 Unity Client**. A link to the MRG and training can be found in the Training Resources section of this document.

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### Changing The Workflow Layout

If your Workflow layout does not resemble the one displayed above, you can easily reset the layout.

1. Click on the “Change Layout” ribbon button in the upper left-hand area of your Workflow layout.



2. To change to the layout displayed above, select the ‘Classic’ layout option. You can select the ‘Classic’ as your default by selecting the “Save current layout as my default” option on the “Change Layout” ribbon button.

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**Note:** If your layout is missing a pane, you can also reset the layout by selecting the desired layout on the “Change Layout” ribbon button..

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## OnBase Virtual Print Driver

The OnBase Virtual Print Driver (VPD) allows users to import documents to OnBase directly from a third-party application, i.e. a web browser, Microsoft Office, etc., by “printing” them in to the system.

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**Note:** You must be logged in to the OnBase Unity Client in order to use the VPD functionality.

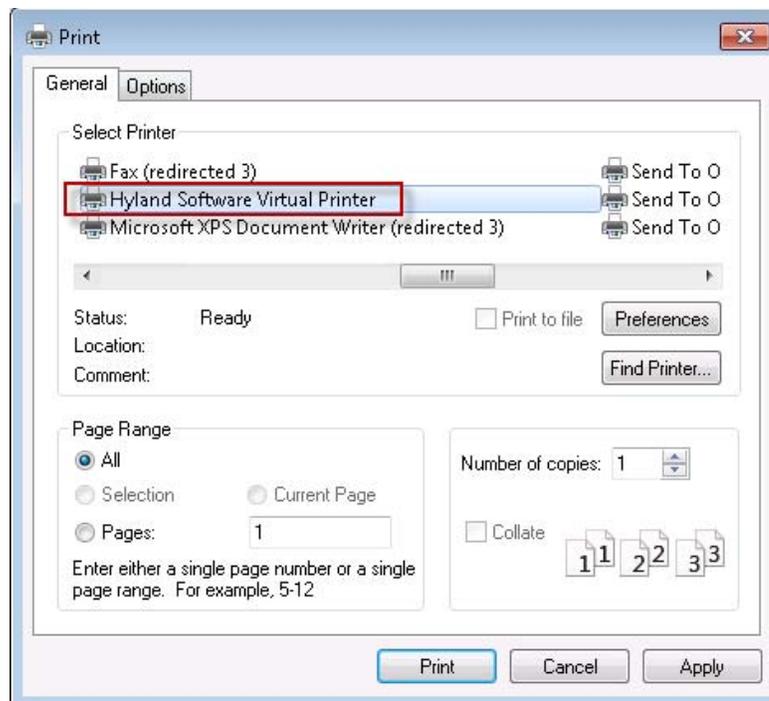
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**Note:** The Virtual Print Driver must be installed on your computer in order to use the functionality.

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1. From your third party application, initiate the print process. The Print dialogue will pop up.
2. Select the “Hyland Software Virtual Printer” from your printer list and click the “Print” button.



3. The “Upload” layout will open up.

4. Follow the instructions listed under the “Upload” section of this user guide to index the document.
5. Your document will be available for Retrieval.

## Opening and Closing OnBase After Login

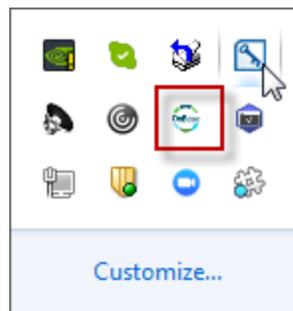
As stated in the Log In section of this guide, the new Unity client now runs continuously in your machine’s System Tray.

### Closing the Unity Client

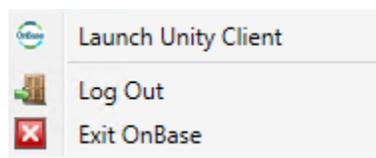
Closing the Unity client by clicking on the X in the top right hand corner of the client window minimizes the application. The application is still running in the background.

### Opening the Unity Client

In order to open the Unity client after logging in, click on the “up arrow” in your system tray (near your clock on the lower right hand corner of your screen and locate the OnBase Unity Client icon.



Then, right-hand click on the icon and select “Launch Unity Client”



### Log Out/Exit the Unity Client

To Log Out or Exit the Unity client, click on the “up arrow” in your system tray (near your clock on the lower right hand corner of your screen and locate the OnBase Unity Client, then, right-hand click on the icon and select “Log Out” or “Exit OnBase”

## Training Resources

### Unity Client Module Reference Guide (MRG)

You can review a shortened version of extensive Hyland Software Unity Client Module Reference Guide (MRG) by clicking on the link below:

[https://onbasetest.enterprise.columbia.edu/endusertraining/16/Unity\\_Client\\_Docs/Module.Reference.Guide\\_UnityClient16.pdf](https://onbasetest.enterprise.columbia.edu/endusertraining/16/Unity_Client_Docs/Module.Reference.Guide_UnityClient16.pdf)

### Hyland Software End User Training: OnBase 16 Unity Client

You can view an extensive and interactive training guide in the link below. The resource contains information and videos on how to further your knowledge of the Unity Client.

[https://onbasetest.enterprise.columbia.edu/endusertraining/16/unity\\_client/](https://onbasetest.enterprise.columbia.edu/endusertraining/16/unity_client/)