



ONBASE 16 UNITY CLIENT

QUICK REFERENCE GUIDE

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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.



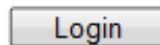
3. Enter the user name in the following box:



4. Enter the password into the following box:



- Click on the “Login” button.



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



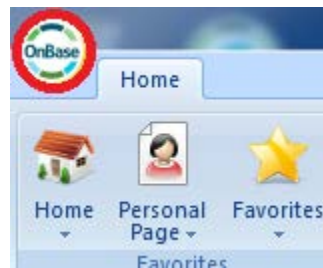
Note: The buttons in the upper area of the screen, where the Ribbons bar is located, may appear greyed out, or missing altogether, depending on your user rights.

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

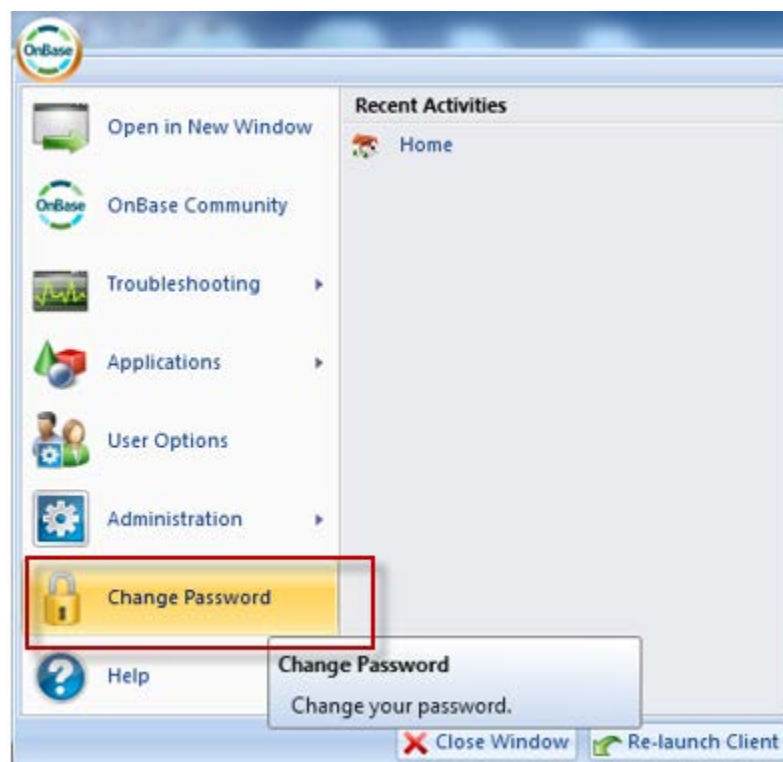
Changing Your Password

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.

- 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.

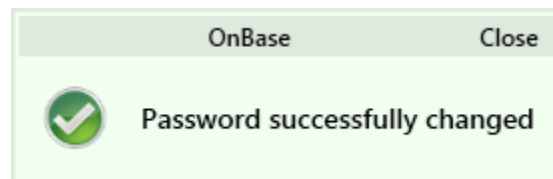
Old Password

New Password

Verify New Password

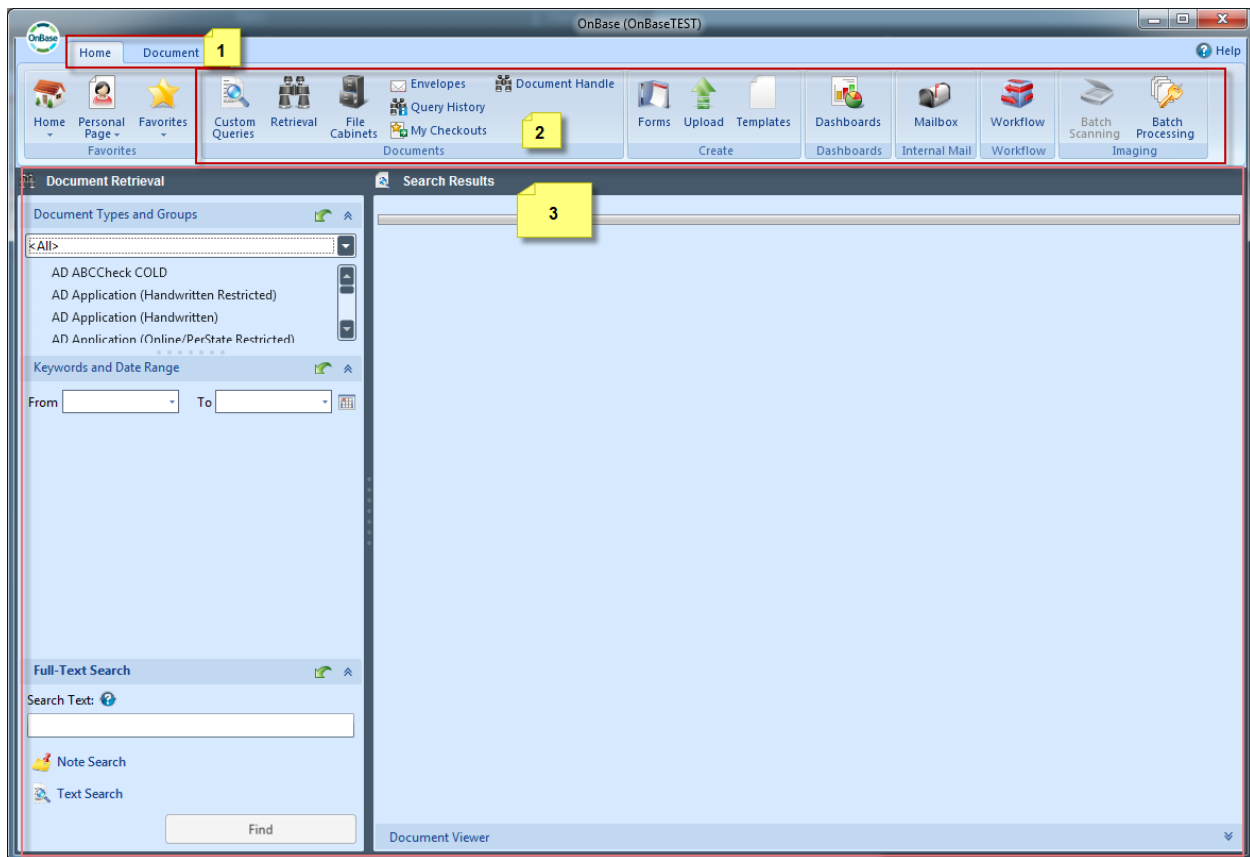
OK Cancel

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.

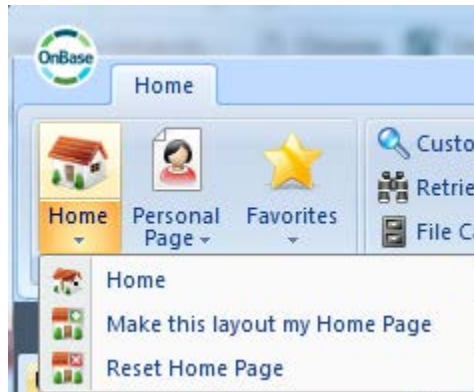
Layout

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

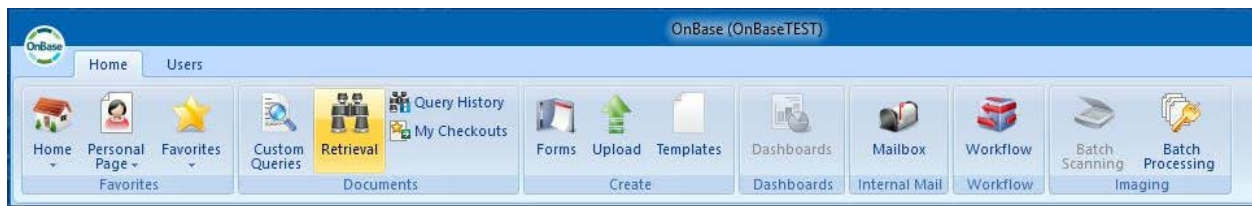
When the **Home** tab is selected, the layout that you have configured as your Home Page is displayed. You can change what you see as your home page by clicking the drop-down and

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.



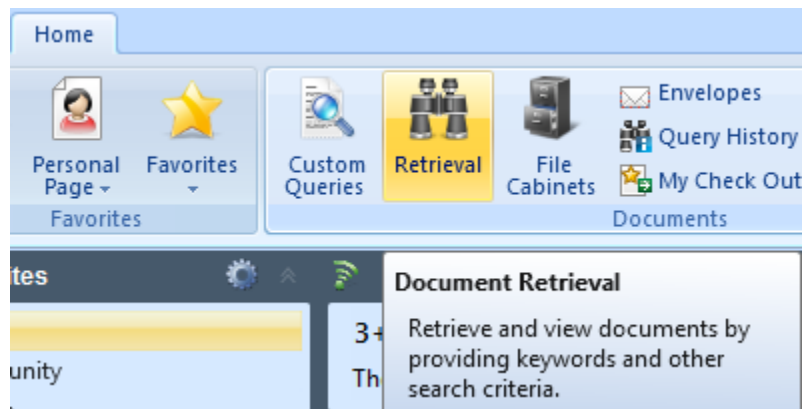
Unity Contextual Ribbon

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.



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.

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

Document Retrieval

Document Types and Groups

Demo

Demo - Employee Information

Keywords and Date Range

From [] To []

FirstName []

LastName []

UNI []

ICAP Country []

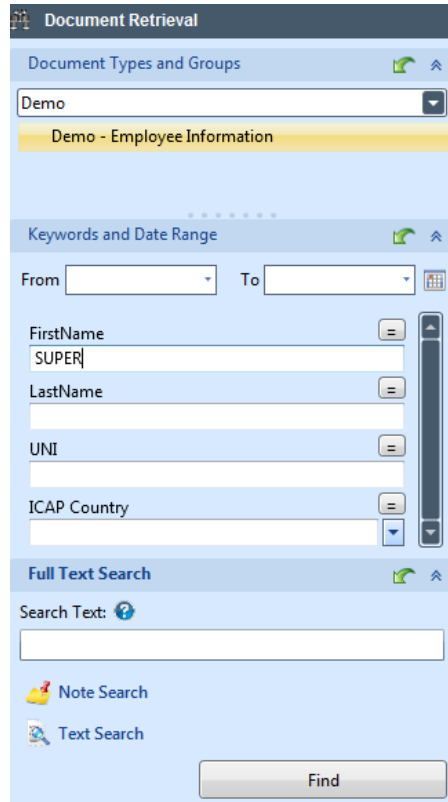
Full Text Search

Note Search

Text Search

Find





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



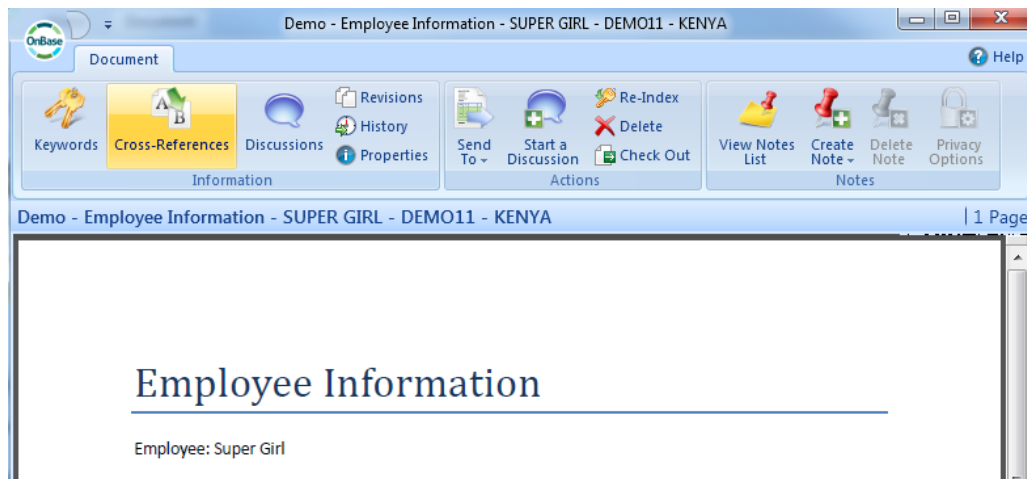
The **Document Retrieval** window is divided into several sections:

- Document Types and Groups:** A dropdown menu currently set to "Demo". Below it, a yellow bar highlights "Demo - Employee Information".
- Keywords and Date Range:**
 - From** and **To** date pickers.
 - FirstName:** A text field containing "SUPER".
 - LastName:** An empty text field.
 - UNI:** An empty text field.
 - ICAP Country:** A dropdown menu.
- Full Text Search:** A section with a "Search Text:" label and a text input field.
- Search Options:** Two icons with labels: "Note Search" (notepad icon) and "Text Search" (magnifying glass icon).
- Find:** A large button at the bottom right.

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

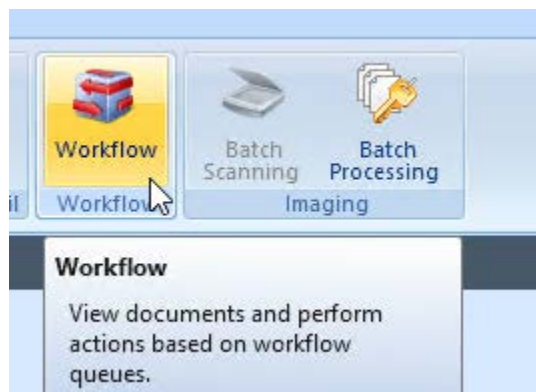
Search Results: 2 Document(s)			
Icon	Name	Type	Date
			
	Demo - Employee Information - SUPER GIRL - DEMO11 - KENYA	Demo - Employee Information	10/25/2016
	Demo - Employee Information - SUPER MAN - DEMO77 - KENYA	Demo - Employee Information	10/25/2016

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.



Workflow

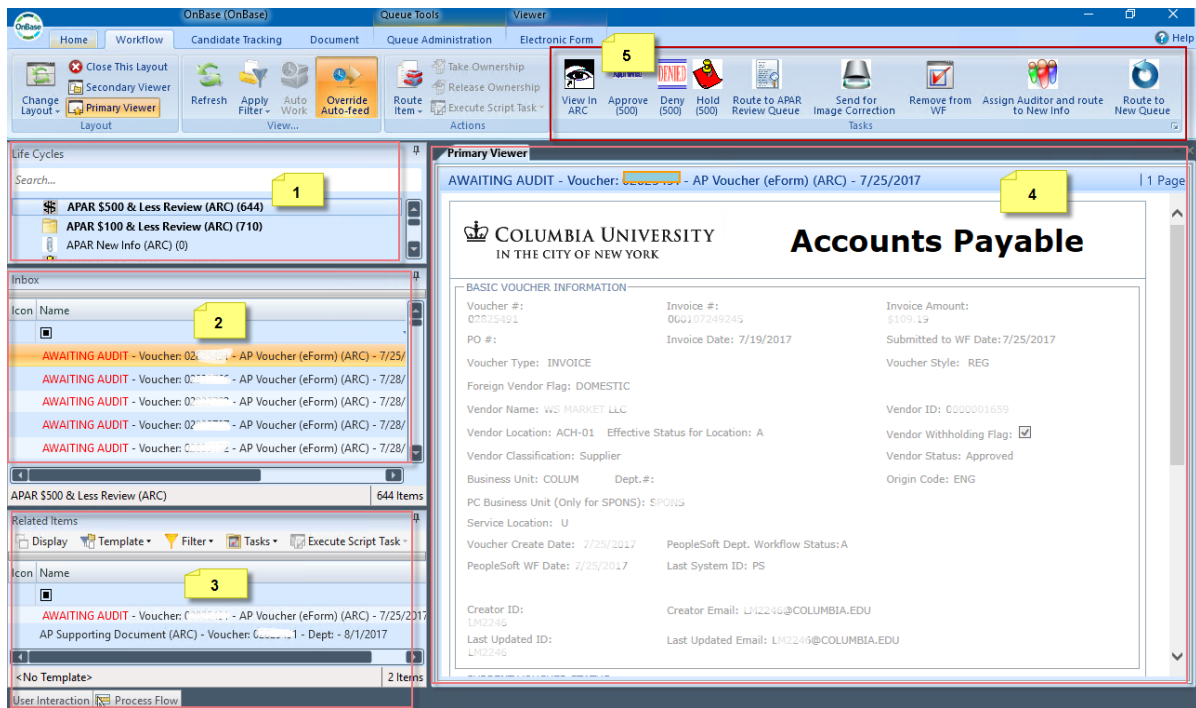
To use the Workflow module, you must open its layout. Click the **Workflow** button in the **Documents** ribbon group.



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

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.

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)

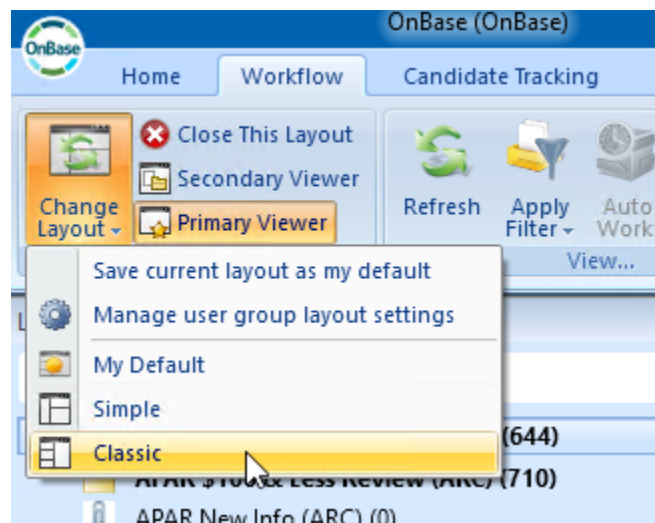
The Task Ribbon displays all ad-hoc tasks assigned to a workflow queue that you have access to. Ad-hoc tasks are actions that users can perform on a selected document in the Workflow inbox. The ad-hocs tasks are highlighted in the area marked with the # 5.

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.

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.

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..

Opening and Closing OnBase After Login

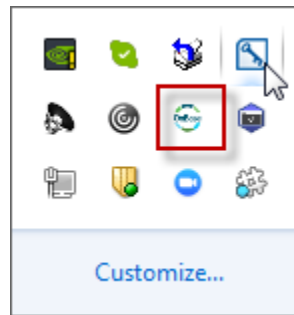
As stated in the Log In section of this guide, the new Unity client now runs continuously in your machine's System Tray.

Closing the Unity Client

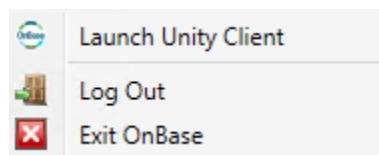
Closing the Unity client by clicking on the X in the top right hand corner of the client window minimizes the application. The application is still running in the background.

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

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/