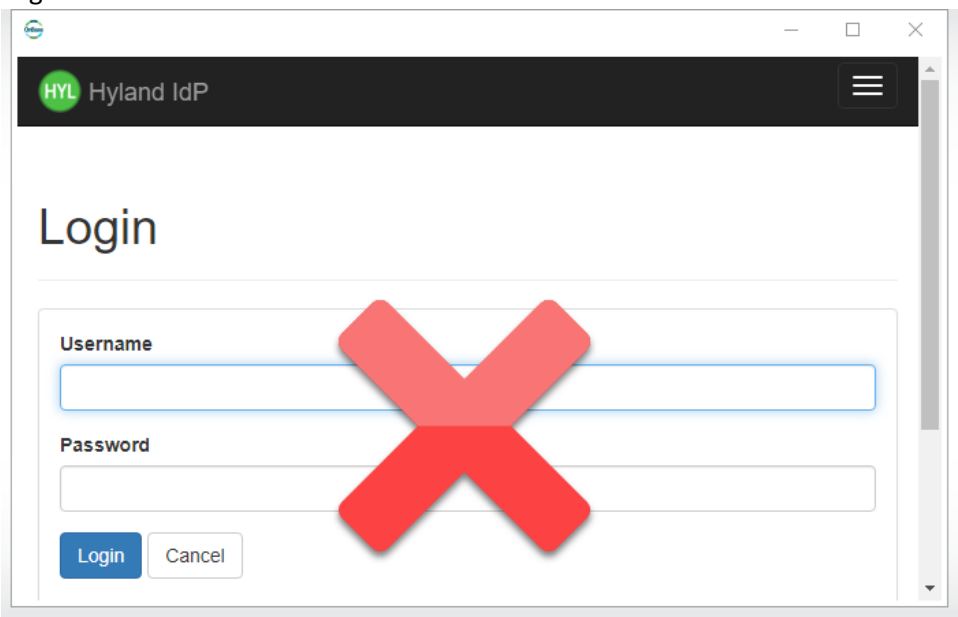
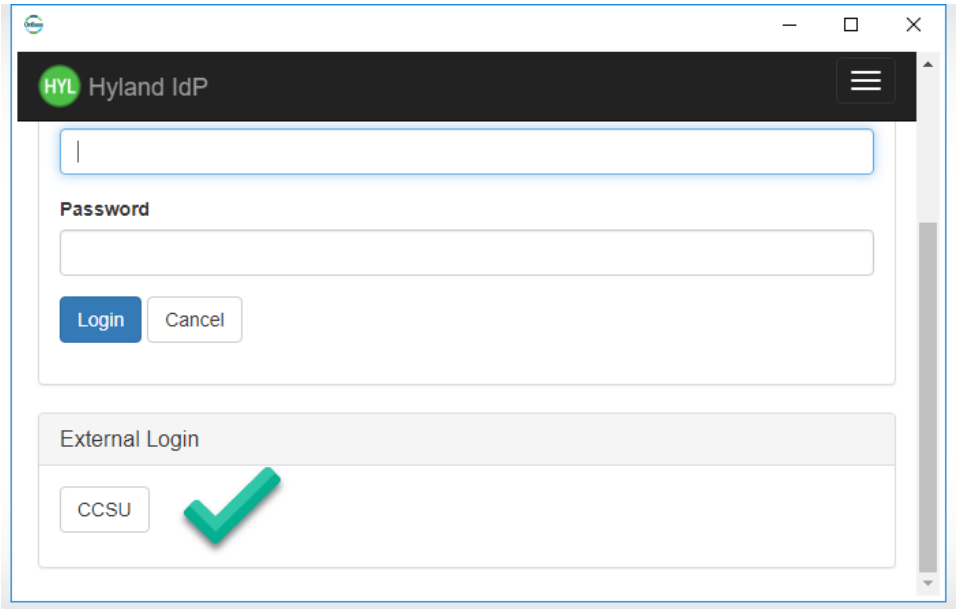
OnBase Unity Client

1) To access the OnBase Unity Client you will need to log into https://secureapps.ccsu.edu . From there click on the Windows Icon in the lower left corner. You will then either navigate to the Prod Application menu or Test Application menu depending on whether you want the production or test environment. From there select the Unity Client icon.

2) Once you launch the client you will be presented with a logon screen like the one below. You will be tempted to login here with a username and password. Don't try, you can't log in with a username and password. Instead scroll down a little and you will see a label that says External Login.

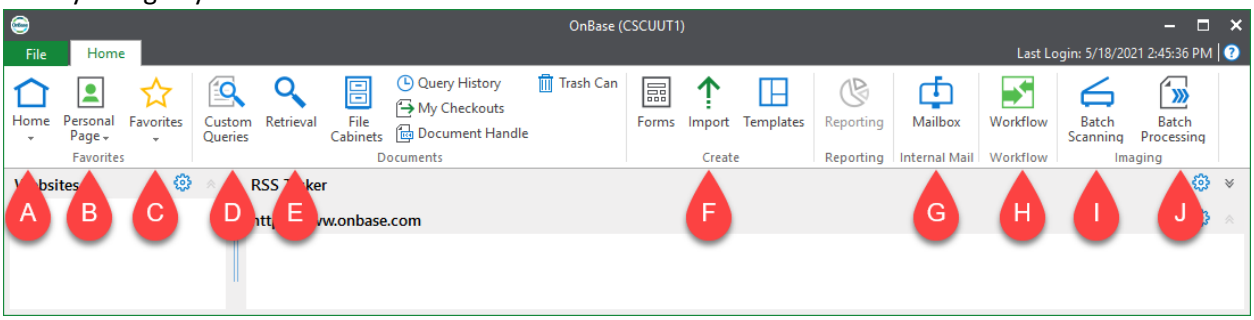


3) Click on the CCSU button to log into OnBase. It uses single sign on and will use the username you logged into secureapps with to log you into Onbase



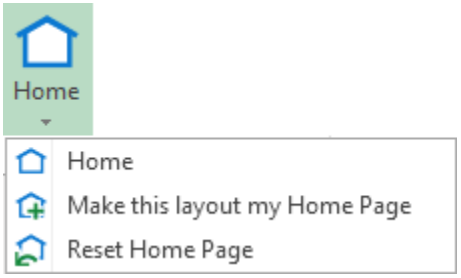
OnBase Unity Client

4) After you log in you will have a screen like this



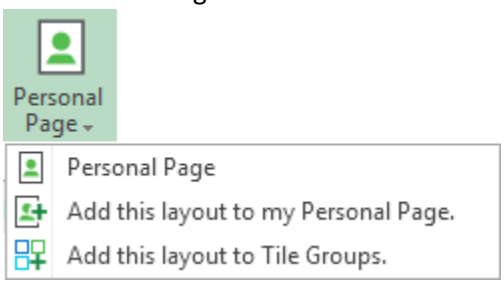
a. This is your home menu.
b. This is your Personal Page menu. Your Personal page can be customized to have sections, that you frequent often, right there so you don't have to go looking for them. This menu can bring you to that layout and has tools so you can modify the layout.
c. The Favorites menu is like bookmarks in a web browser.
d. Custom queries are specialized queries that will allow you search for documents based on the criteria of the query. This may be used if you are frequently looking for documents that always have the same set of keywords, and you only need to modify one or two keywords on the document. Not all users will have custom queries.
e. Retrieval is where you can look up documents.
f. Import allows you to bring other digital documents such as PDF or Word documents into OnBase without scanning them. OnBase will then convert them to TIFF image files.
g. Mailbox is where you see documents sent to you by other users. These are documents outside of a workflow process.
h. Workflows allow you to route documents for processing. For example, a document may need to be reviewed by a manager before it is a approved. With a workflow the digital document can be sent to them for review then forward to the person who needs to approve it.
i. Batch Scanning is similar to what occurred in ImageNow. This is where you will scan physical documents into OnBase
j. Batch Processing is where you will index the documents that were brought in via batch scanning

5) The home menu:



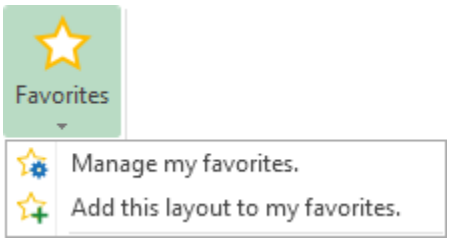
This would normally be used to have a web feed from Hyland that contains information from OnBase however since we are in the secure enclave that feed is blocked.

6) The Personal Page menu:

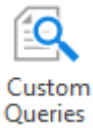


If you select Personal Page this will bring you there. If you are on another screen and select Add this layout to my Personal Page it will add that screen to your personal page.

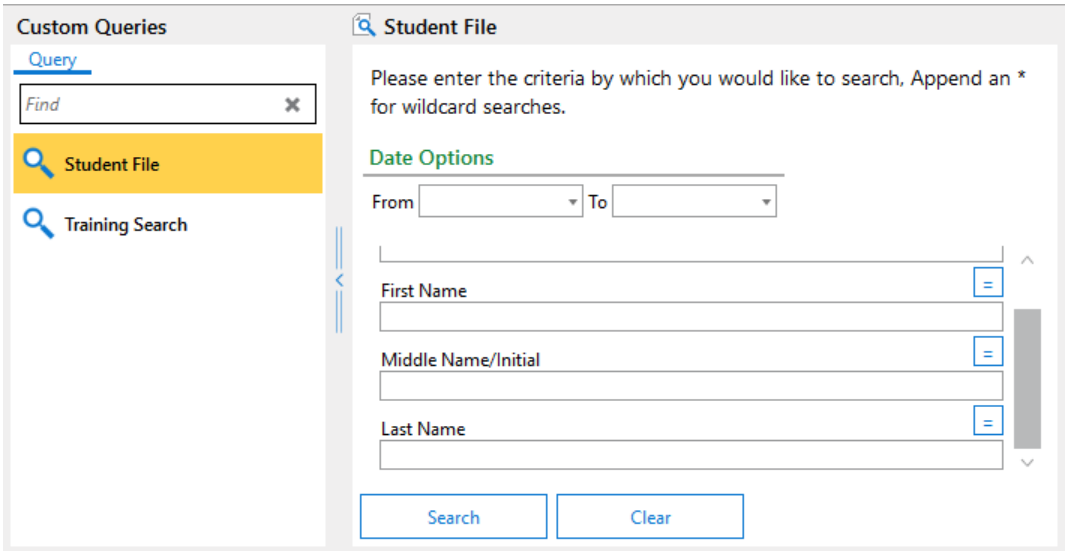
7) The Favorites menu:



Works like bookmarking in a web browser. You will see all the sections that you have added to your favorites and will be able to go to them quickly. If you are on another screen and select Add this layout to my favorites it will add that screen to the list of favorites. This is very similar to the Personal Page but instead of being tiles it is a list.

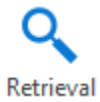
8) When you click on the Custom Queries Icon 

you will see a screen like this:

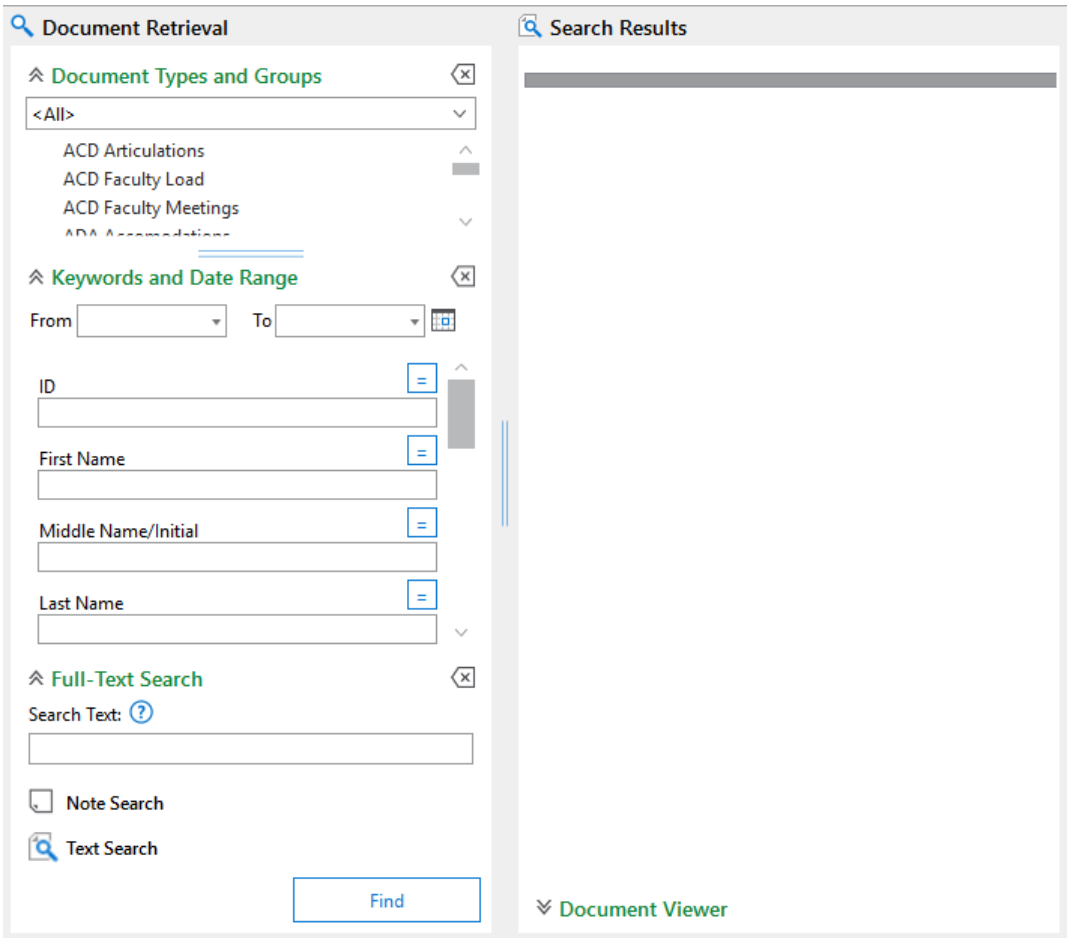


Custom queries can be helpful in that they help narrow the search for you and will often provide some direction on how to use the query. Just fill in the fields to narrow your search then click

the search button to retrieve the matching documents.

9) When you click on the Retrieval icon 

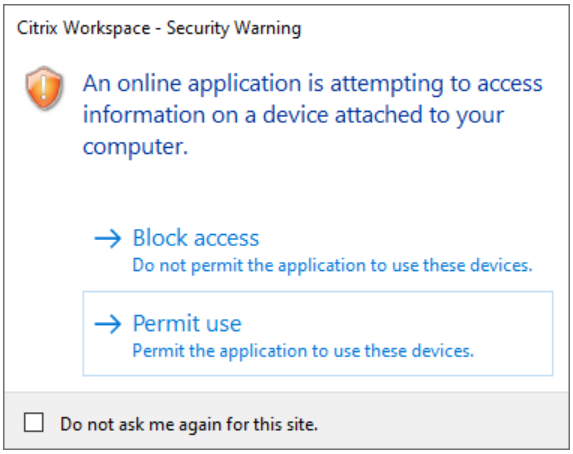
you will get a screen that is almost the same as the Document Retrieval screen in the web client. Both screens function in the same manner.



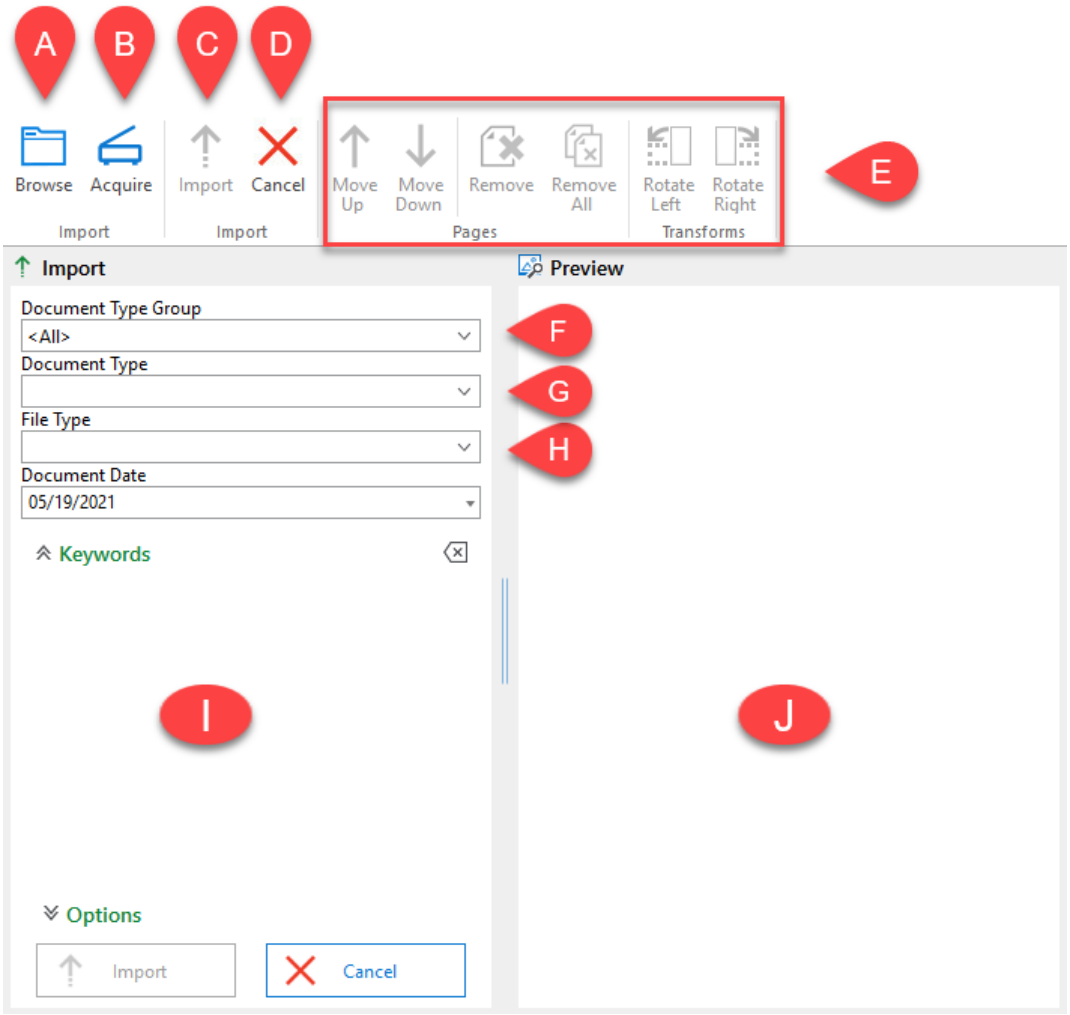
OnBase Unity Client

10) When you click on the import icon

you will be brought to the import screen and may get a pop-up screen like this:



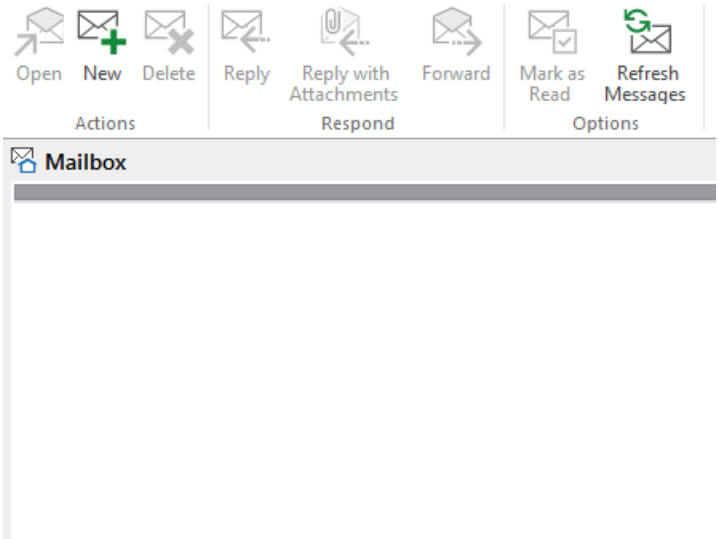
Just click the Permit use button. The import screen is very similar to the one in the web client and looks like this:



a. Browse - will allow you to look for the file you want to import into OnBase
b. Acquire - is if you have an imagining device such as a camera and want to bring in pictures or videos.
c. Import – will bring the document in once it is ready for import
d. Cancel – will cancel the process
e. These options are for when you are bringing in graphic files such as jpg or tiff. For the most part the files that would be imported will not be of this time so these will not be used.
f. From this drop down box you select the document group Bursar, Card Office, Admissions, etc.
g. Once you have the group you can then select the specific document type
h. From this drop down you select the type of file you are importing, Word document (doc/docx), pdfs, Excel files (xls/xlsx), etc.
i. Once the document group and type have been selected the keyword field will populate with the keywords for that document type. Fill out the needed keywords.
j. This is a preview screen so you can look at the document before you import it.

11) When you click on the Mailbox

icon you will be brought to the Mailbox screen.

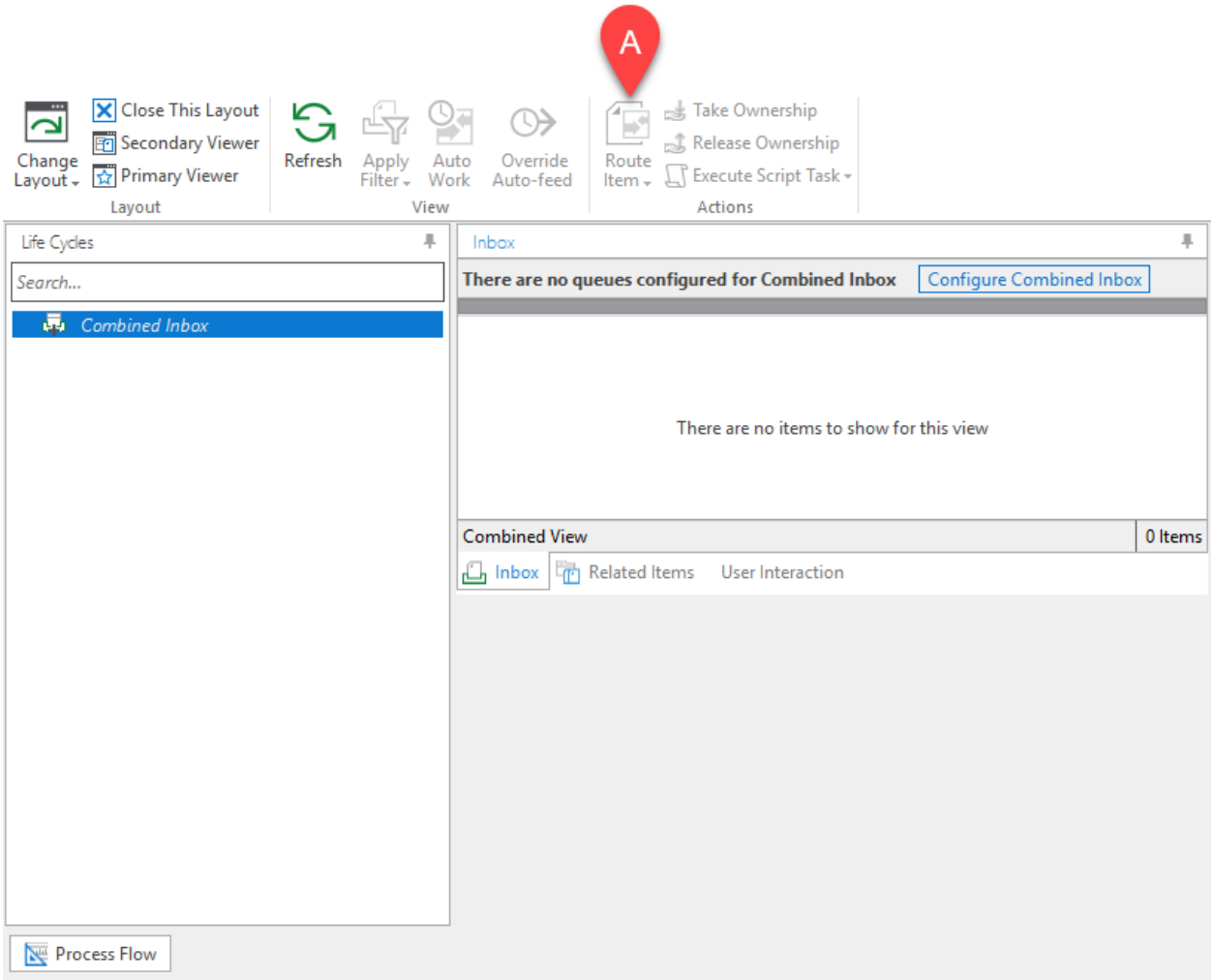


This screen works much like an email client such as outlook. You can send, receive, and view messages here. The difference is that you are limited to those who have OnBase accounts.

OnBase Unity Client

12) When you click on the Workflow icon

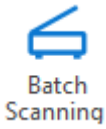
you will be brought to the workflow screen.



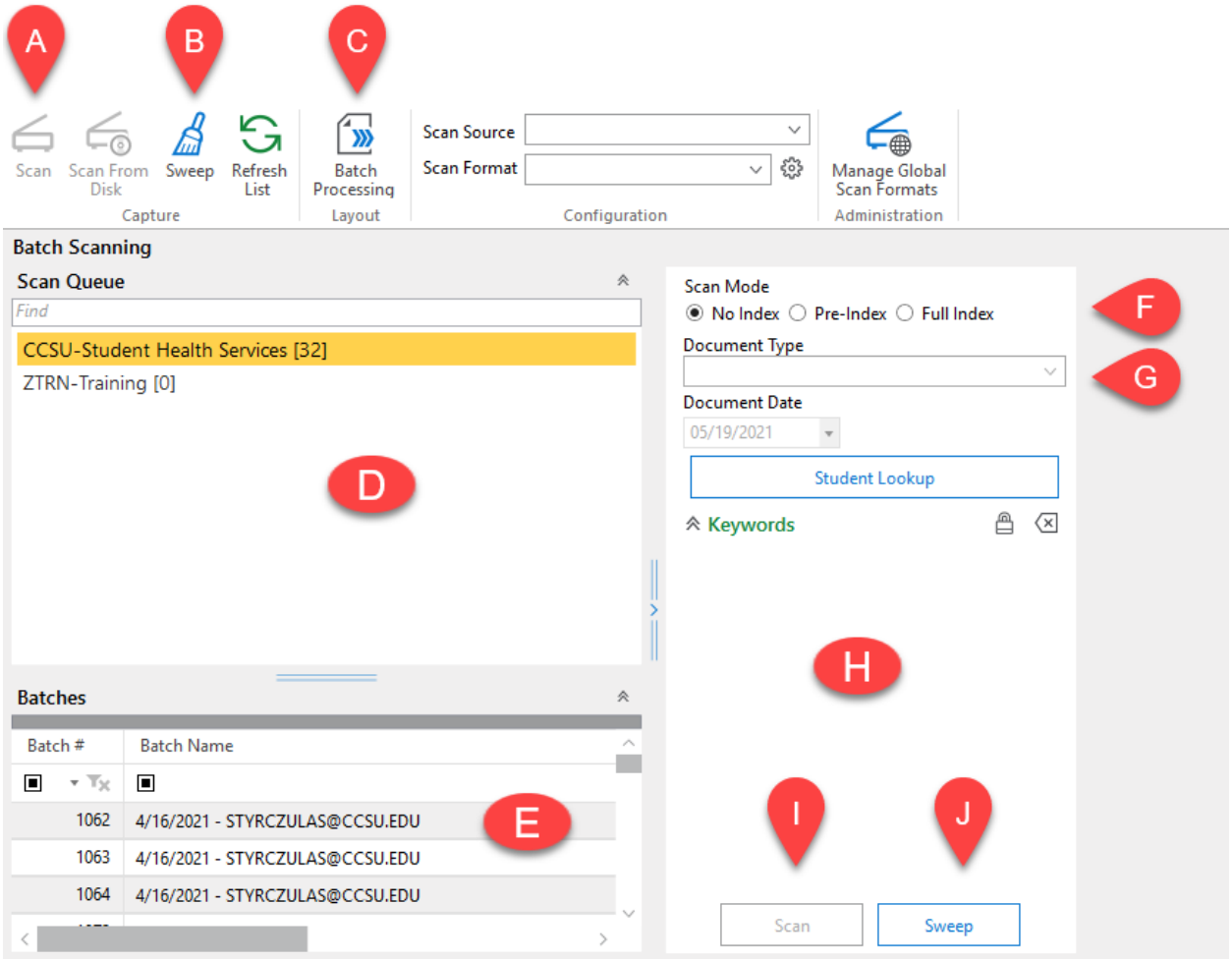
Many people will not be using most of the functionality of this screen. In many cases all a user will be concerned about it is:

a. Route Item – this will allow you to route the document to the next queue in the workflow.

OnBase Unity Client

13) When you click on the Batch Scanning icon 

you will have a screen like this:

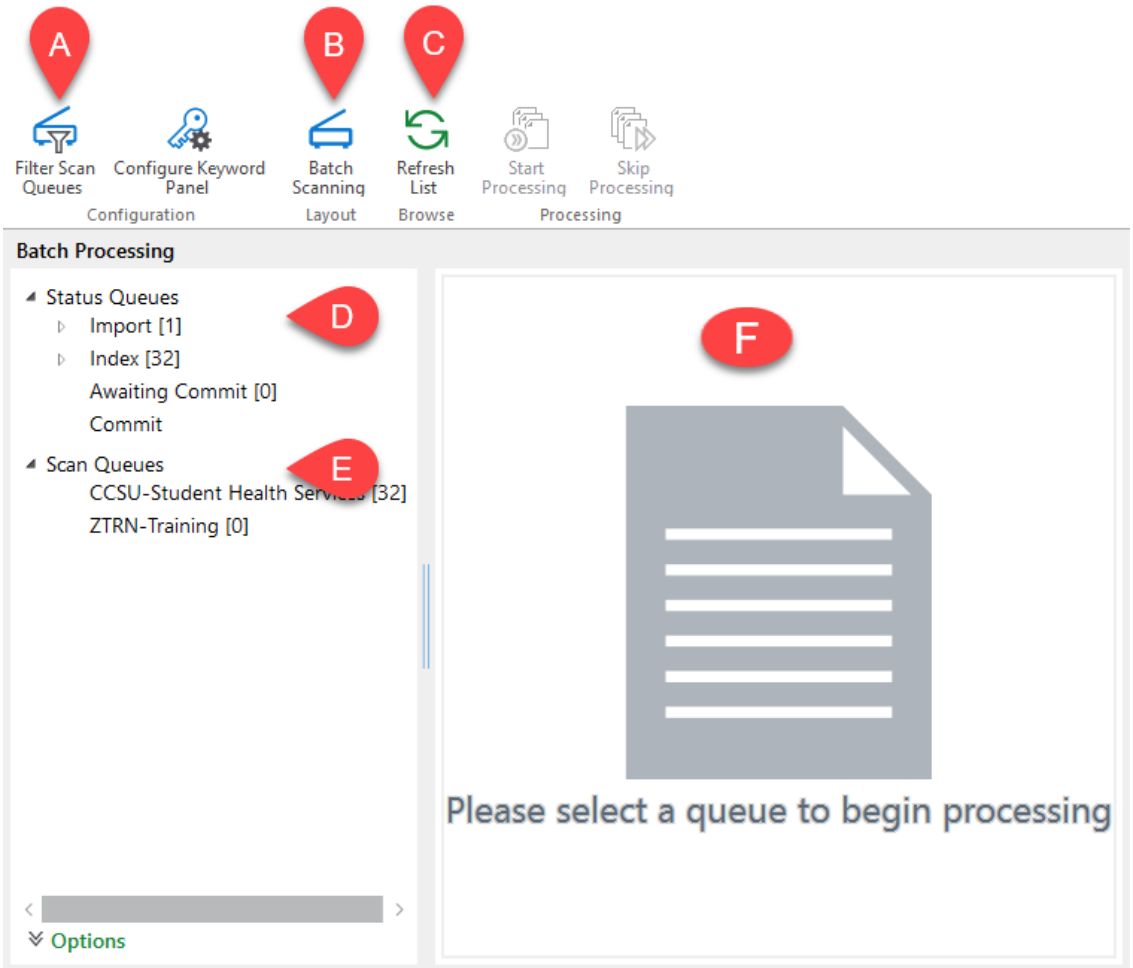


a. Scan – will scan the document from your scanner
b. Sweep – will pick up files from a folder and bring them into OnBase. It is similar to importing but not exactly the same, in that it picks up all the files in a selected folder not a single file.
c. Batch Processing – will allow you to index the document batches
d. Scan Queue – shows the queues you have access to and that you can scan document into.
e. Batches – shows the scan batches that still need to be indexed
f. Scan mode – will allow you scan a document with no indexing (required keywords), Pre-index where some required keywords are entered or Full Index where all the required keywords are entered.
g. Document Type – is used to select which document you want this to scan in as. Once selected the keywords will appear in section H
h. Keywords – shows the keywords for the selected document type
i. Scan – run the scanner and bring the document into OnBase

j. Sweep - will pick up files from a folder and bring them into OnBase. It is similar to importing but not exactly the same, in that it picks up all the files in a selected folder not a single file.

14) The Batch Processing icon is also available outside of the Batch Scanning screen. When you click on Batch Processing

icon you will get a screen like this:



a. If you have access to a large number of scan queues this will allow you to filter down to the ones you want to see
b. This will bring you to the screen in item 13
c. While you are processing the queue someone else may have been scanning documents into it. Refresh List will update the list so you can stay on top of what is in your queue.
d. Shows where the document is in regard to the indexing process.
e. Shows the documents that are in a queue and have not been indexed.
f. Will display the list of documents in a queue once the queue has been selected.