

OnBase UNITY CLIENT - QUICK REFERENCE GUIDE

UPLOAD A DOCUMENT

1. Open the **OnBase Unity Client** and from the Create Group, select **Upload**



2. Import a document from a drive accessible from your workstation by selecting **Browse** under Import



3. You will be required to select a **Document Type Group** and a **Document Type** from the Upload Pane. The Document Type you select will determine how the document is classified and the **Keyword Types** available for indexing. Mandatory keyword types are labeled with red text

4. Once indexing is complete, select **Upload**

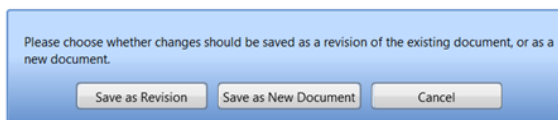


You can also upload a document by **dragging and dropping** the document into the Preview pane



REVISE A DOCUMENT

Retrieve the document you would like to revise from OnBase. If the document is not in use by another user you will be able to create a revision. Once you have edited and saved the document changes, you will be prompted with the following OnBase upload options:

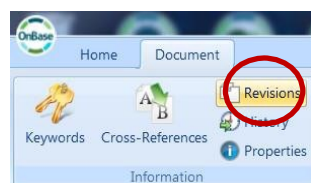


- **Save as Revision** – Saves the document as a new revision. Any text you enter in the comment screen will be saved as a comment for the revision
- **Save as New Document** – Saves as a new document. You will be given the option to select a Document Type, File Type and any applicable Keyword Values
- **Cancel** – Cancels the upload. No new documents or revisions will be added

When you upload a document that contains the same indexing information as another document already in OnBase, you will be given the option to save the document as a revision or as a new document.

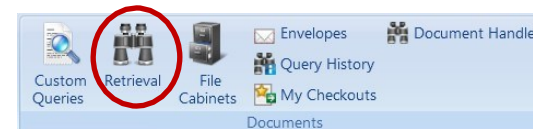
View a Revision to a Document

1. Retrieve and highlight the document
2. Click on the **Document** tab and select **Revisions**



RETRIEVE A DOCUMENT

1. Open the OnBase Unity Client and from the Documents Group select **Retrieval**

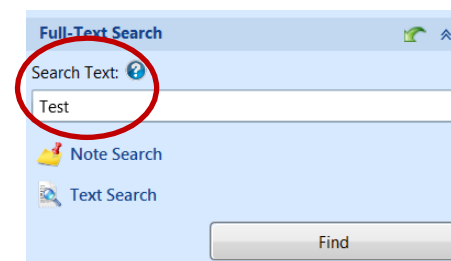


2. Select a **Document Type Group** and **Document Type**. You can select multiple document types with **SHIFT + Click** or **CTRL + Click**
3. The **Keyword Types** available for retrieval are determined by the **Document Type(s)** you selected. Enter the Keyword Values that will identify the document you want to retrieve and select **Find**

You can use **wildcards** as substitutes for unknown characters (*) or for a single unknown character (?)

Full-Text Search

Under **Full-Text Search** type in the phrase or word you would like to retrieve and select **Find**



To narrow the search you can select a Document Date, Document Type Group or Document Type. Wildcard characters are also available in Full-Text Search.