



OnBase 13 User Manual

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OnBase is the document imaging and archiving software that replaced Singularity in 2012. The software is maintained by a company called Hyland. Using Hyland's OnBase application, workflows and processes can be customized for different offices, departments, and campuses, allowing for increased efficiency and effectiveness.

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Logging in to OnBase

OnBase is accessed through an application often referred to as *the Unity Client*. This terminology simply indicates that the software program has been downloaded to the computer, as opposed to being stored in a web-based environment. To log in to OnBase:

1. Navigate to the computer's *Start Menu* and select **Start**.
2. Choose **All Programs**.
3. Choose **Hyland**.
4. Choose **Unity Client**.

NOTE: When accessing the Unity Client, users will view options for accessing Hyland Unity Client [TEST] and Hyland Unity Client [PROD]. Please be sure to access the correct version.

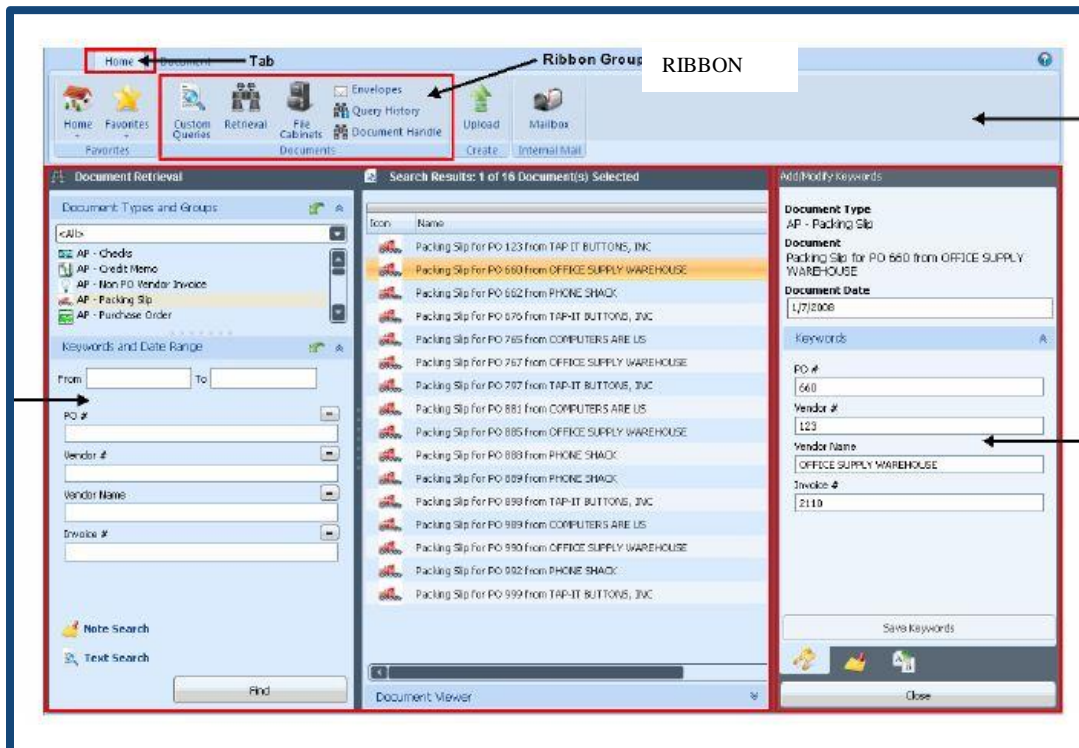


5. Enter the user's credentials in the dialog box and select **Login**.
6. The *Unity client* will now open.

Navigation

The OnBase Unity Client window has three primary areas: the *layout*, the *ribbon*, and the *task pane*.

TASK
PANE



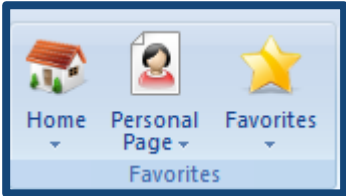
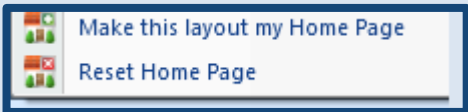

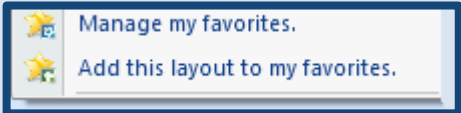
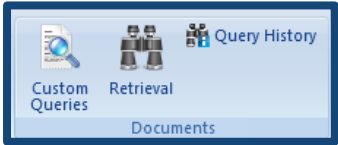
The Ribbon
The ribbon displays available user actions based on the currently

displayed layout. A *ribbon* is displayed by clicking on the corresponding tab. Each tab is divided in to ribbon *groups*, or categories of user actions.



The Home Tab

In the image above, the **Home** tab is displayed. The **Home** tab is visible after logging in to OnBase. Like other tabs, the **Home** tab is divided into ribbon *groups*. The **Home** tab displays several commands, summarized below.

NOTE: Users can minimize the *ribbon* by right-clicking on the *ribbon* and selecting **Minimize the Ribbon**. Users can maximize the *ribbon* by right-clicking and choosing the same option.

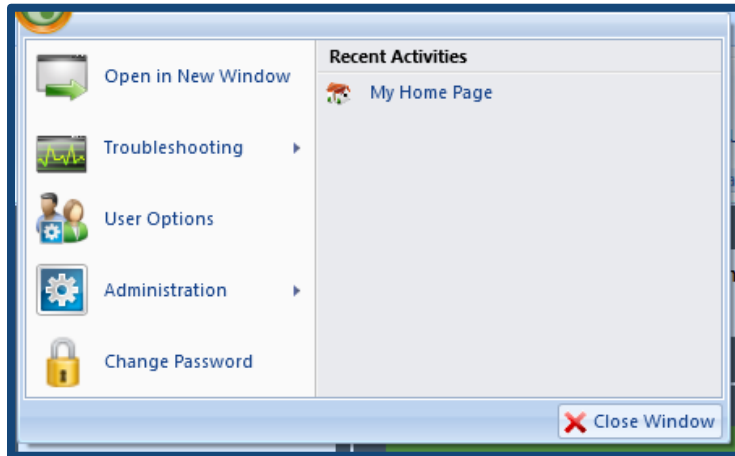
<p>The Favorites Group</p> 	<p>The <i>Favorites group</i> is used to open and configure the home layout and favorites.</p>	
<p>Home</p>		<p>Use these options to:</p> <ul style="list-style-type: none"> • Make the currently displayed layout the home page • Reset the layout that is displayed as Home to the default
<p>Personal Page</p>		<p>The <i>Personal Page</i> command allows users to view and edit their Personal Page.</p>
<p>Favorites</p>		<p>Use these options to:</p> <ul style="list-style-type: none"> • View, rename, and delete layouts that have been added to favorites • Add the currently displayed layout to Favorites
<p>The Documents Group</p> 	<p>The <i>Documents Group</i> is used to work with documents once they have been scanned, indexed, uploaded, or printed in to OnBase.</p>	

<p>Custom Queries</p>		<p><i>Custom Queries</i> allows administrators to build and modify custom search criteria.</p>
<p>Retrieval</p>		<p>Use the Retrieval command to bring documents into the Unity Client once they have been scanned and indexed.</p>
<p>The Create Group</p> 	<p>The <i>Create Group</i> is used to work with the creation of documents in the Unity Client via upload from your computer, as well as working with HTML Unity Forms.</p>	
<p>Forms</p>		<p>Working with forms allows users to develop more detailed, personal custom queries related to specific documents within the system.</p>
<p>Upload</p>		<p>Choose the Upload command to upload documents into the Unity Client from your computer.</p>
<p>The Workflow Group</p> 	<p>The workflow group will be available for Unity Client users who have permission to view projects within workflows.</p>	<p>By selecting the Workflow command, users will be able to view the workflows of their specific department. Departments are responsible for training employees on workflow processes.</p>

<p>The Imaging Group</p>  <p>The icon for 'The Imaging Group' is a blue-bordered box containing two sub-icons: 'Batch Scanning' (represented by a scanner) and 'Batch Processing' (represented by a stack of papers with a key). The word 'Imaging' is centered below these two sub-icons.</p>	<p>The Imaging Group assists users in imaging, scanning, and processing files.</p>	
<p>Batch Processing</p>	 <p>The icon for 'Batch Processing' is a blue-bordered box containing a stack of papers with a key icon and the text 'Batch Processing' below it.</p>	<p>Select Batch Processing to image files after they have been scanned. NOTE: In previous versions of the Unity Client, this command was called <i>Batch Indexing</i>.</p>

The Application Menu

Select the **Application** button in the upper left-hand corner of the Unity Client window to access administrative functions and open previously used layouts. After clicking the **Application** button, the **Application Menu** is displayed.



- Selecting *Open in a New Window* allows the user to open the current layout or search results in a new window.
- The *Troubleshooting* option allows the user to show troubleshooting information such as the information on the connection to OnBase, rendering information, and memory usage as well as viewing and clearing the request log.
- Choose *User Options* to configure options within OnBase such as

settings for imaging, printing, and document handling.

- Selecting *Administration* allows the user to manage document locks.
- Users can change their OnBase password by selecting *Change Password*; however, since Columbia College users log in to OnBase with their CougarTrack credentials, the **Reactivate your Login** tool in CougarTrack is a better option for password maintenance.

Layout

Each screen in the OnBase Unity Client is referred to as a *layout*. Default *layouts* are set for most of the actions in OnBase, including Document Retrieval. OnBase will open the *Home Layout* by default when the application is launched, but users are able to customize the *Home Layout*.

The Task Pane

The *Task Pane* is displayed in relation to the user action. For example, selecting the **Keywords** option on the **Document** contextual tab displays the *Add/Modify Keywords* task pane.

Typically, the *task pane* is used to view some information that will be displayed briefly and then closed. It is also used for tasks such as adding documents to an envelope, displaying a document's keywords, notes, and cross references, or managing Favorites.

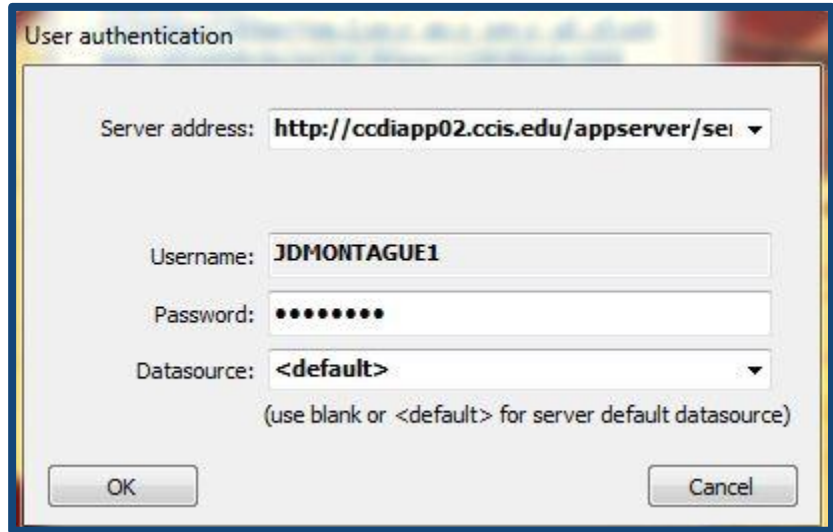
Processes in OnBase

Scanning Documents

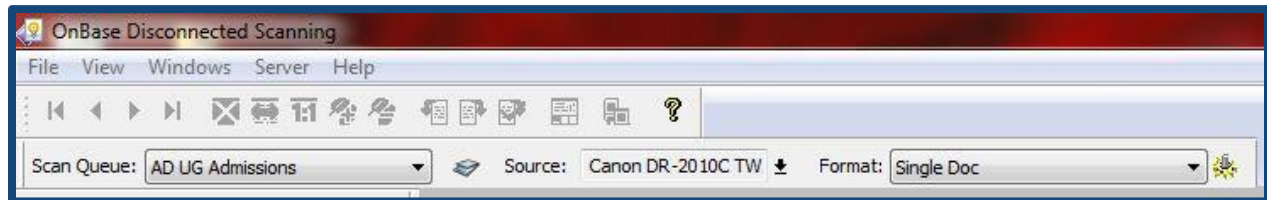
1. To begin scanning documents, open the Disconnected Scanning software by choosing **Hyland** from the **Start Menu** and selecting **Disconnected Scanning**.

2. Enter the user's credentials in the *Disconnected Scanning user logon* dialog box.
3. Select **Server** to log in to the Disconnected Scanning server.

NOTE: ccdiapp02.ccis.edu is the server address for OnBase Test. To log into OnBase production, enter ccdiapp.ccis.edu as the server address.



4. Select **OK** in the *User authentication* dialog box to launch the Disconnected Scanning application.
5. Select a **Scan Queue, Source,** and **Format** before attempting to scan.



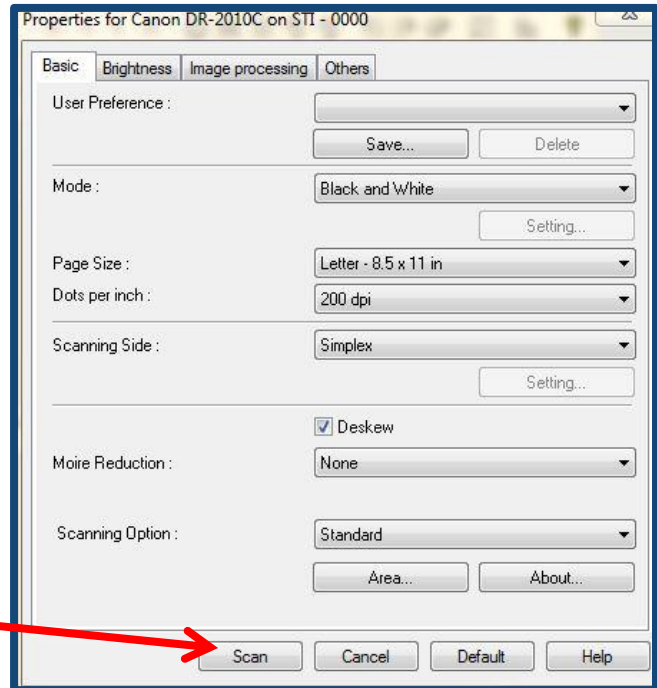
Scan Formats:

Simplex: Multi-Document/Single Page	Each one-sided page in the batch is scanned as a separate document.
Duplex: Multi-Document/Single Page	Each two-sided page in the batch is scanned as a separate document.
Simplex: Single Document/Multi Page	The one-sided document is scanned as a multiple page document.
Duplex: Single Document/Multi Page	The two-sided document is scanned as a multiple page document.

NOTE: It is recommended to use the Multi-Document/Single Page format for most scanning projects.

6. Place the document(s) in the scanner face down.
7. Select **File**.

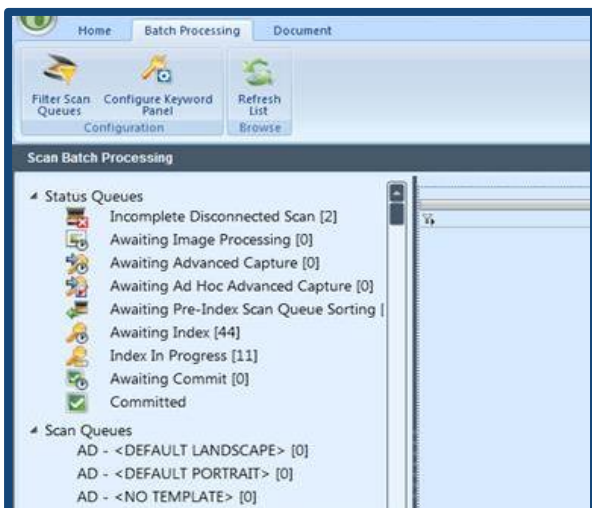
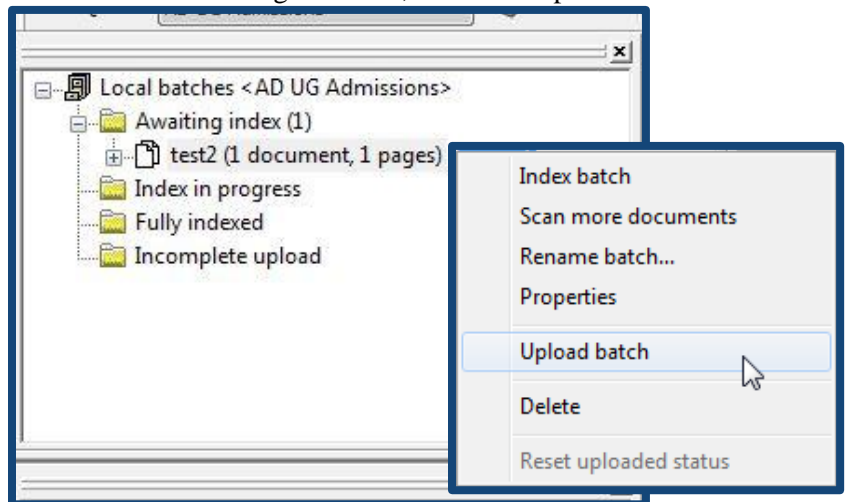
8. Choose **Scan new batch**.
9. Dedicate a name to the batch and choose **OK**.
10. The *Properties* dialog box will open. Ensure that:
 - a. The page size is listed as Letter- 8.5 x 11 in
 - b. The Dots per inch is listed as 200 dpi
 - c. The Scanning Side is listed as Simplex.
11. The document will be scanned and a preview will be displayed on the screen.
12. When the document has completed scanning, choose **Cancel**.
13. To scan additional documents into the current batch, choose **Scan More Pages**.
14. When the documents have finished scanning into the batch, choose **Done**.



Uploading Documents from Disconnected Scanning

Once the batch has been scanned using the Disconnected Scanning Software, it must be uploaded into the Unity Client. To do so:

1. Locate the batch in the *navigation tree* within the *navigation pane* on the left side of the screen.
2. Right click on the batch and choose **Upload Batch**.
3. The *Verify Operations* dialog box will display.
4. Click **Yes**.
5. The batch will now upload into the *Unity Client*. To continue working with it, open this application.

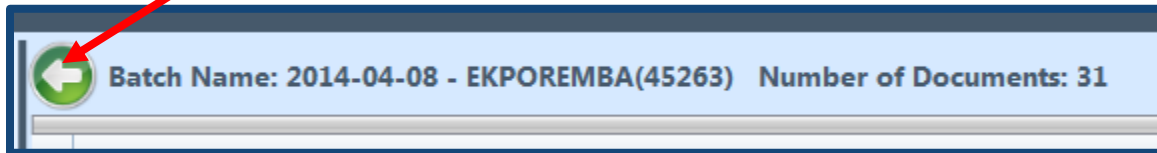


Processing Documents

Once documents have been uploaded into the Unity Client, they will need to be indexed. Indexing documents moves them into the document archive in the Unity Client so they will be available for retrieval later.

1. Log in to the Unity Client.
2. From the **Home** tab, choose **Batch Processing**.

3. Choose the appropriate scan queue for the batch. It is no longer necessary to select **Awaiting Index** from the *Status Queues* and then select your scan queue. Click directly on the scan queue. Note that scan queues and status queues now appear in a *navigation tree* on the left side instead of status queues being located across the top.
4. Locate the file in the existing batches and double click on the batch name to view and preview the documents in the batch.
5. After previewing the batch, click the green arrow next to the batch name to return to the Scan Queue list.



6. The batch has now been previewed and is ready for indexing. Right-click on the batch name and click **Index Documents**.
7. In the *Batch Indexing* pane, choose a document type. The fields below may take a moment to populate, as they are document type specific.
8. Associate a COMM Code and a Datatel Person ID with the document. Press **Tab** on the keyboard to auto-populate the remaining fields.
9. To index the batch, click **Index**.

A Note on Scan Queues

When batches are indexed in the Unity client, they may take up to five minutes to commit. When users access scan queues within Unity, they will notice the batches are sorted into different categories:

- **Awaiting Index:** Documents that have been scanned with Disconnected Scanning and need to have keyword values associated prior to indexing.
- **Index in Progress:** Documents that are currently indexing.
- **Awaiting Commit:** Documents that need to be committed to the system. Documents can take up to five minutes to be committed to the system.
- **Committed:** Documents that are available for retrieval in the Unity Client.
- **Incomplete Disconnected Scan:** Batches are placed in to the Incomplete Disconnected Scan process queue when a batch upload from Disconnected Scanning cannot be completed.

If a user is unable to locate a batch within retrieval, it is likely due to the batch not having been committed. If the user is able to locate the document in the *Awaiting Commit* queue, wait the requisite five minutes and attempt to index the document.

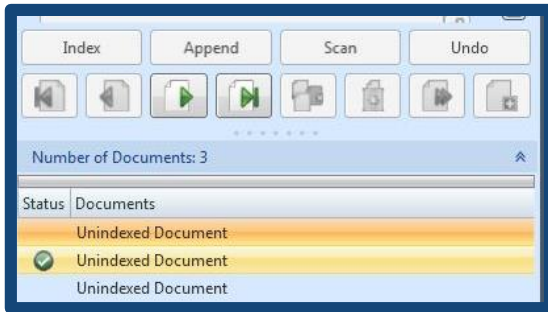
Appending Documents

When users are indexing documents in the Unity Client, they have the ability to append, to append, or join documents together. To do so:

1. Click **Batch Processing** from the **Home** tab on the *ribbon*.
2. Select a scan queue and a document to be indexed.

Batch #	Batch Name	Scan Date	Status	Total Document	# to be Indexed
377	2012-06-12 - JDMONTAGUE1	6/12/2012 11:55 AM	Awaiting Commit	0	0
384	2012-06-20 - MRTAYLOR1	6/20/2012 9:43 AM	Awaiting Commit	1	0
385	2012-06-21 - JDMONTAGUE1	6/21/2012 11:34 AM	Awaiting Index	3	3

- Right click on the batch to be indexed and click **Index Documents**.
- Associate a document type and keywords with the document in the *task pane*.



- Click **Index**.
- After the document has been indexed, a green check mark will appear next to it in the *document pane*.
- Select the next document from the *document pane*. Associate a document type and keyword values with the document.
- Click **Append**. This will join the second document to the first when it is indexed.

- A green check mark will appear next to the appended document.
- Continue to append all relevant documents in the batch.

Splitting Documents

In addition to adding additional pages to already indexed documents, the Unity Client offers the ability for users to removed pages from document and create a separate document, referred to as *splitting* the document. To do so:

- Open a document. Select the first page of the document to re-index.
- Right click on the document and choose **Send To**.
- Click **Create New Document**. In the *Create New Document* dialog box, enter indexing information regarding the new document.
- Click **OK**.
- A new document will be created from the pages indicated in the *Create New Document* dialog box. These pages will be deleted from the original document by default.

Re-Indexing Documents

Occasionally, documents may become associated with incorrect *keyword values* or the wrong document type. To change these items, the document will need to be re-indexed. To do so:

- Open the document in the *document viewer*.
- In the *ribbon*, click **Re-Index**.
- The *Re-Index task pane* will open on the right side of the screen.
- To change the Document Type, select a new option from the Document Type drop down menu.
- To associate the document with a different individual, type the new ID number in the Datatel Person ID field.
- Press the **Tab** key on the keyboard to auto-populate the remaining *keyword values*.
- After the necessary changes have been made, click **Re-Index**.

Document Retrieval

The document retrieval process assists users in locating, viewing, and manipulating documents that have previously been indexed. To retrieve a document:

1. Select **Retrieval** from the **Home** tab on the *ribbon*. The *Document Retrieval layout* will open.
2. Choose a document type. To search for all document types associated with an index value, select any document type and hold down the **Control** key and the letter **A** on your keyboard simultaneously.
3. Enter the index values associated with the document to be located. Enter the College ID number in the *Datatel Person ID* field and press the **Tab** key on the keyboard to auto-populate the remaining fields.
4. Click **Find** to locate all the documents associated with the specified document type and index values.
5. Locate the document in the *Search Results pane* and double click on the document to view it.

Uploading Documents from your Computer

Using the Unity Client, users have the option to upload documents from their computers as an alternative to using the scanning process (the equivalent to using the **Import** function in Singularity). To do so:

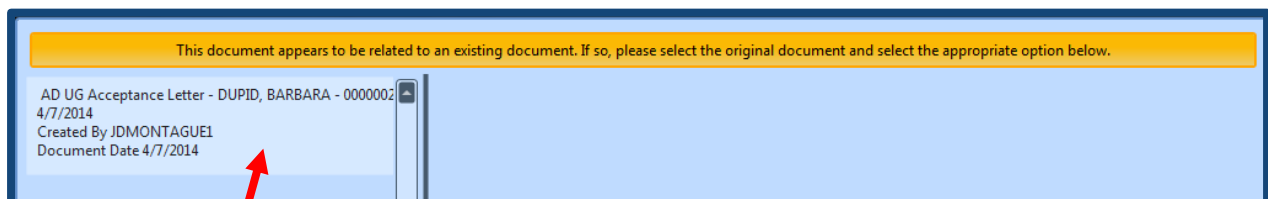


1. Select **Upload** from the **Home** tab on the *ribbon*. This will open the *Upload Contextual tab*.
2. Select **Browse** from the *ribbon*.
3. Locate the document to upload and choose **Open**.
4. Using the *Upload layout*, associate a document type and index values with the document.
5. Choose **Upload**.
6. The Unity Client will confirm the document has been uploaded and the document will open in the *Document Viewer*.

Appending Documents via Upload

With Unity Client 13, users are able to append to existing documents via the Upload command.

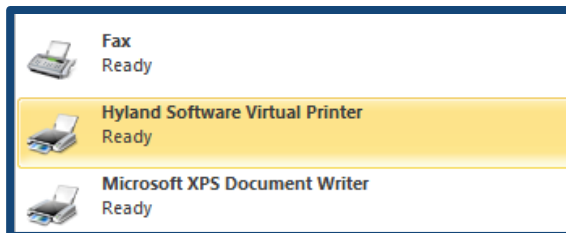
1. From the **Home** tab on the *ribbon*, click **Upload**.
2. Select **Browse** from the ribbon and locate the document to be uploaded. Click **Open**.
3. Choose a document type and keyword values and select **Upload**.
4. If the document is recognized by the system as possibly being an addition to an existing committed document, the system will present the following message: **This document appears to be related to an existing document. If so, please select the original document and select the appropriate option below.**



5. Choose the document from the left hand navigation pane to which the new document should be appended.
6. A preview of the document will populate with assigned keywords.
7. Double check that the document you are uploaded should be appended to the previewed document and click **Append Page(s)**.
8. To upload the document as a new document, click **Save as New Document** from the bottom left corner of the dialog box.

Using the Virtual Print Driver

The Virtual Print Driver is a program that is installed on user's computers and allows them to print documents into the Unity Client from any program on the local computer. To use the Virtual Print Driver:

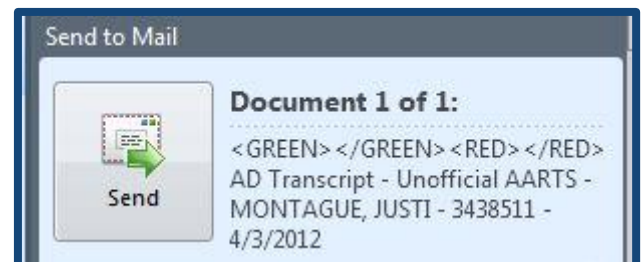


1. Locate a document on the computer to store or manipulate within the Unity Client.
2. Follow the procedure for printing the document from the specific program.
3. Choose to print the document to the printer named **Hyland Software Virtual Printer**.
4. The document will open in the Unity Client under the **Upload** tab.
5. Associate a document type and index values with the document and choose **Upload**.
6. The document is now uploaded into the Unity Client.

Sending Documents via Email

Occasionally, users may need to send documents via email. To do so:

1. Open the document in the *document viewer* by using the **Retrieval** tool.
2. From the *Actions group* on the *ribbon*, click **Send to**.
3. Click **Mail Recipient (As Attachment)**.
4. The *Send to Mail task pane* will open. Choose a file format and settings for the document as well as any notes associated with the document.
5. Click **Send**. A new message will open in Microsoft Outlook with the document listed as an attachment. Proceed as you normally would in sending the email.



Other options for sending documents include:

- **Internal user**—send the document to a user via internal mail.
- **Envelope**—displays the *Envelope Pane* in the *task pane*
- **Print**—displays the *Print dialog box*
- **File**—displays the *File pane* in the *task pane* and allows the user to save the file to his or her computer

Saving a Document to your Desktop

Occasionally, users may need to save an existing document to their computer. To do so:

1. Open the document in the *document viewer*.
2. From the *Actions* group in the *ribbon*, click **Send to**.
3. Click **File**. The *Send to File task pane* will open.
4. Choose a location on your computer for the file by clicking on the folder above the **Save** button.
5. Click **Save**.

The Notes Gallery

If the user has sufficient privileges, he or she can view and create notes and annotations on documents using the *Notes Gallery*.

Notes are available from the *Notes Gallery* when a document is opened in the OnBase viewer or selected in the *Document Search Results* list. To add a note:

1. On the **Document** tab, in **Notes**, select the type of note.
2. If the user is adding a note to an open text or image document, click on the document to place the note. To add text to the note, double-click the note.
3. If the user is adding a note to a document in the *Document Search Results* list, the *Notes Pane* is displayed in the *task pane*. If necessary, type the text for the note here and then choose **Close**.
4. To delete a note, perform one of the following:
 - a. Select the note and click **Delete Note** in the *Notes Gallery*.
 - b. Right click on the note in the *Notes pane* and click **Delete Note**.

NOTE: Notes are limited to 250 characters.

Annotations

Annotations are available from the *Notes Gallery* when a document is opened in the *OnBase Viewer*. Because annotations must be drawn onto documents, they are not available from the *Notes Gallery* when a document is selected in the *Document Search Results* list. To add an annotation:

1. Select the type of annotation from the *Notes Gallery* in an open document. Depending on the type of annotation that has been selected, the user may be prompted to add text after the note has been placed in the document.
2. Define the location and size of the annotation by clicking and dragging the cursor over the document. Ensure that the annotation is visible in the *Document Viewer*. Release the mouse button when finished to display the annotation.
3. There is no need to save annotations.

Notes in the Document Viewer






Users with the appropriate viewing rights will see most notes displayed on the document when viewing it. Some notes are displayed open, and some must be opened to view their content.







<p>Viewing and Hiding Notes</p>	<p>Some notes are displayed in the document as an icon. Double click this icon to view the note. Notes may either be shown or hidden on documents by default. To show or hide notes:</p> <ul style="list-style-type: none"> • Right click the document • Click Show/Hide Notes in Viewer
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Moving Notes	To move a note click and drag the <i>note icon</i> on the document. Release the mouse button when the note has been moved to the desired position. The new position is saved automatically. <ul style="list-style-type: none"> Note: Users cannot move a note outside of a document.
Deleting Notes	To delete a note, right click on the note icon or on the note. Click Delete Note . Click Yes to confirm that the note should be deleted.
	Click View Notes List from the <i>Document Tab</i> to display the <i>Notes Pane</i> . Select the note to be deleted. Click Delete Note in the <i>Notes Gallery</i> . Click Yes when prompted to confirm. Click Close .
Editing a Note	Click View Notes List from the <i>Document Tab</i> to display the <i>Notes Pane</i> . Select the note to be edited. Edit the note. Click Close to close the <i>Notes Pane</i> .

Working with Images

The **Image** tab (a contextual tab in the *Document Viewer*, accessed through the **Retrieval** tool) allows users to view documents more efficiently. The options below can be used to resize and reorient documents.

	Selection Zoom	This option allows users to zoom in on selected regions of the document. After clicking on Selection Zoom , click on the document and drag the mouse to select an area to zoom in on. Release the mouse button to zoom in on the selected area.
	Hand Tool	The Hand Tool allows users to pan, or scroll, the document in any direction. When this button is selected, click on the document and drag the mouse to move the document.
	Previous Document	Previous Document displays the previous document in the <i>Document Search Results</i> list.
	Next Document	Next Document displays the next document in the <i>Document Search Results</i> list.
	Previous Page	Previous Page displays the preceding page of a multi-page document.

	Next Page	Next Page displays the following page of a multi-page document.
	First Page	First Page displays the first page of a document.
	Last Page	Last Page displays the last page of a document.
	Go to Page	Go to Page allows the user to navigate to a specific page of the document. After clicking this icon, type a page number and click OK .
	Toggle Thumbnails	Toggle Thumbnails allows the user to expand and collapse the page thumbnails on the right side of the <i>document viewer</i> .
	Modify	The Modify command contains several other options for document modification including editing and splitting documents, as well as rotating and flipping documents.

Working with Keywords

Some documents have one or more *keyword values* (referred to in Singularity as *index values*) displayed automatically in the **Keywords** window when the document is opened. Users can also view *keyword values* that are not auto-displayed. Depending on the system's configuration, these *keyword values* may be masked or read-only.

Viewing Keywords

To access a document's keywords:

1. Right click on a document in the *Document Search Results* list or an open image or document and select **Keywords**. Users may also click **Keywords** from the *Documents tab*.
2. Selecting **Keywords** will activate the **Add/Modify Keywords** pane. From this pane, users may view a document's *Document Date* or *Keyword Values* depending on the user's rights and the document type.

Note: Although some users may have permissions to modified *keyword values* in this *task pane*, **it is not recommended to use this function to change the keywords associated with documents**. It is recommended that users change keyword values via the re-indexing process.

Read Only Keywords

Sometimes users can view, but not modify, some or all of the *keyword values* on a document. This can be for the following reasons:

- Keywords can be configured to appear as read-only to certain user groups.
- The user group does not have the right to modify keywords.
- Another user has the document checked out or locked.

Wildcard Characters

A wildcard character can be used to match *keyword values* where one or more characters are unknown. Wildcard characters can only be used to match alphanumeric *keyword values*.

1. Type one of the following wildcard characters directly into the *keyword type* field to search for text strings containing one or more unspecified characters:
 - a. *-- the * wildcard character can be used to replace one or several characters of a text string. For example, the text string Ste*ens will find all instances of both Stevens and Stephens.
 - b. ?—the ? wildcard character can be used to replace a single character in the text string. For example, the text string Sm?th will find all instances of both Smith and Smyth.

The Application Enabler

The third section of OnBase is the *Application Enabler*. The *Application Enabler* allows for integration between the Unity Client and Datatel Colleague. When using the *Application Enabler* with Colleague, users can view documents stored in the Unity Client that are associated with the student's College ID number. To use the Application Enabler:

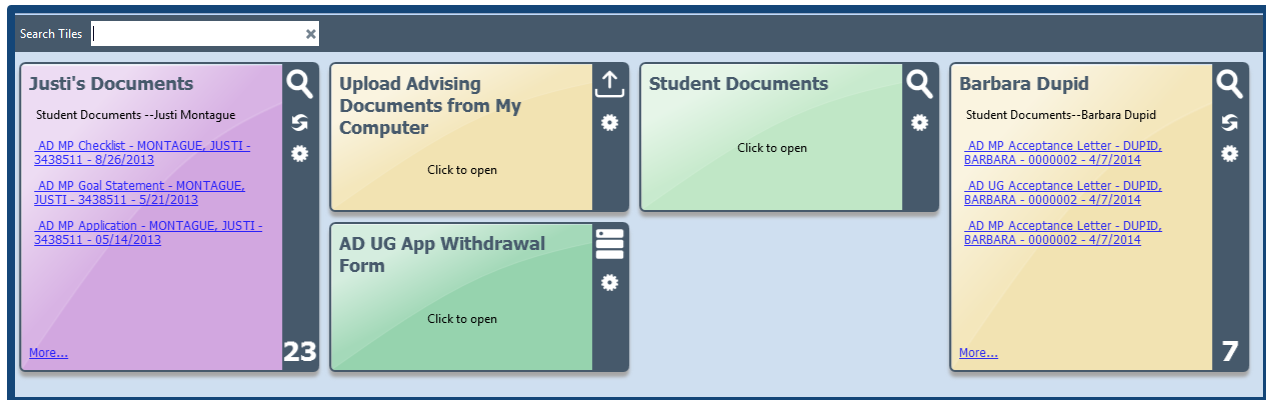
1. Be sure the Unity Client is open in the *system tray* on your computer.
2. Log in to Datatel Colleague. Search for a record in Colleague.
3. Press down the control key on your keyboard and click on the College ID number in the context card.
4. After a moment, a new *Unity Search Results* window will display, populated with a list of all documents stored in the Unity Client for the user whose record is open.
5. Click on a document in the *Documents Pane* to view it.
6. Close this window when finished.

Customizations in the Unity Client

OnBase 13 offers several easy customizations in the Unity Client, including the ability to build completely custom Personal Pages as well as the ability to personalize several of the user options for a dynamic user experience.

Personal Pages

The Unity Client now offers customizable Personal Page features that can speed up access to information. Personal Pages allow users to add commonly accessed layouts to a centralized location for easy access. Access your Personal Page by selecting **Personal Page** from the **Home** tab on the *ribbon*.



Adding Document Types to your Personal Page

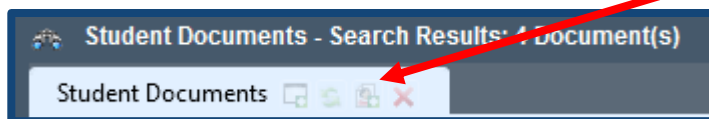
If a user is consistently uploading documents under a specific document type, you are able to set up a personal page tile that contains that preset document type. After doing so, users can easily upload documents by selecting that tile from his or her personal page.

1. Click **Upload** from the **Home** tab on the ribbon.
2. Select a *Document Type Group* and a *Document Type*.
3. Click the **Home** tab on the *ribbon*. Click the arrow below **Personal Page**.
4. From the drop down menu, click *Add this layout to my personal page*.
5. The layout will now be available in your personal page and will redirect to the Upload screen for that particular document type when clicked.

Creating Personal Page Tiles with Custom Queries

If you are consistently searching for the same student using the *Student Documents Custom Query*, you can save the results from that Custom Query as a tile in your personal page. To do so:

1. Click **Custom Queries** from the **Home** tab on the *ribbon*.
2. From the *Query* navigation pane, click **Student Documents**.
3. Enter a user's **Datatel Person ID** in the corresponding field and select **Submit**.
4. Once the results are displayed on the screen, click the *Send current custom query search results to personal page* option.



5. Enter a description for the custom query. This description will be the name for the custom query tile. Click **OK**.
6. The custom query tile will be added to your personal page.

Adding Forms to Personal Pages

1. Select **Forms** from the **Home** tab on the *ribbon*.
2. In the *Forms* navigation pane, select the **AD UG App Withdrawal Form** (or another appropriate form you frequently use).
3. Click the **Home** tab on the *ribbon*. Click the arrow below **Personal Page**.

4. From the drop down menu, click *Add this layout to my personal page*.
5. The layout will now be available in your personal page and will redirect to the appropriate form when clicked.

Customizing User Options

Users have the ability in Unity Client 13 to customize several options that essentially reconfigure the way OnBase works to be more preferential. To do so:



1. Click on the **Application Menu** from the Unity Client.
2. Click **User Options**.
3. Use the resulting dialog box to customize specific options for how the Unity Client works for you including:
 - a. The confirmation message that displays when a user logs off or exits the system.
 - b. Automatically open the notes pane when viewing documents.
 - c. Ability to automatically delete files from your computer after they have been uploaded into Unity.
 - d. Automatically expand the *Options Panel* at the bottom of the *upload/browse/acquire* menu.

Technology Services has identified the most helpful customizations under the **General**, **Document**, **Document Upload**, and **Workflow** tabs in the *User Options* menu.