# OnBase Quick Reference Guide
# Submitting Content – Unity Client

Content can be imported to OnBase using a number of methods. Use this Submitting Content – Unity Client to learn how to import content using the Unity client installed on a Windows PC.

To install the Unity client, refer to the [OnBase Web URLs and Unity Client ClickOnce URLs](#).

Batch Scanning is covered under the [Scanning Documents Quick Reference Guide (QRG)](#) and must be done using the Unity client. Refer to that guide to learn how to scan batches of documents or sweep multiple documents into OnBase from network directories.

The [Submitting Content – Web Client QRG](#) details importing content using the OnBase Web client.

## Importing documents

Perform the following steps to import a document using the Unity Client on a Windows PC.
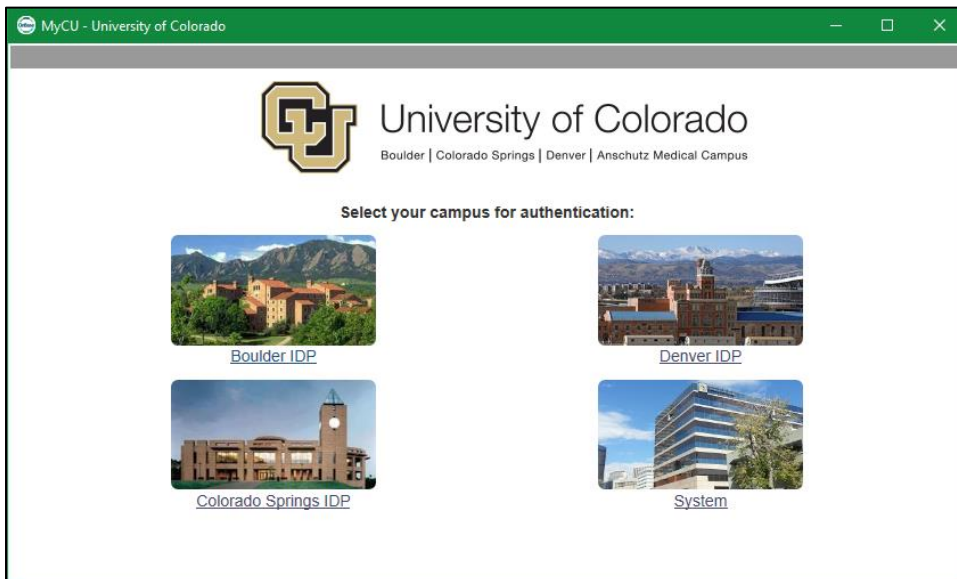
1.      Login into the Unity Client with your campus credentials.

First, select your campus. Depending on the size of the window, you may see campus names only or the campus names along with pictures. Single click on campus names or double click if the picture is displayed.
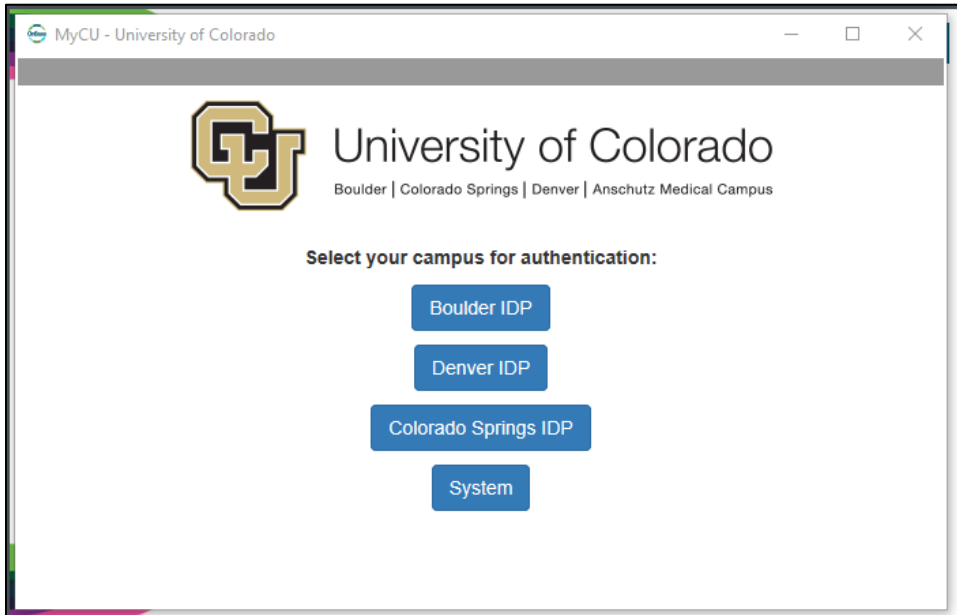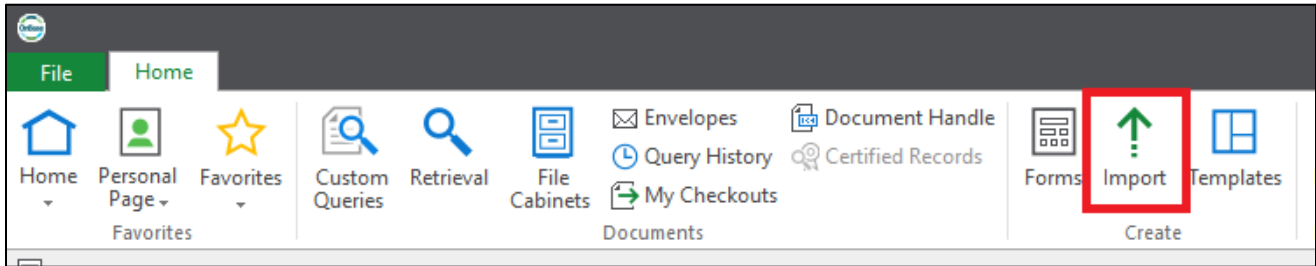
*Single click to select the desired campus.*



*Double click to select the desired campus.*

Enter your campus credentials. For assistance with your campus credentials, refer to the links on the login page for your campus.
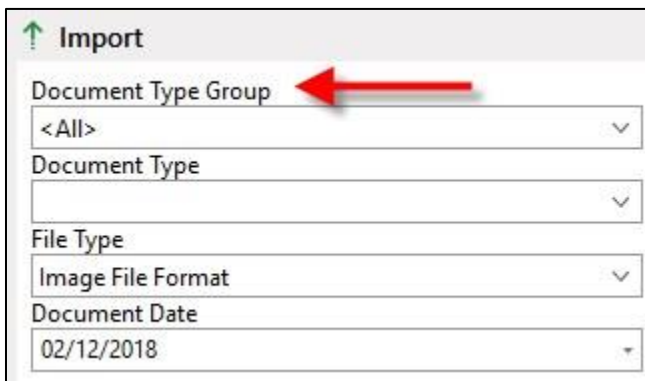
2.    Click **Import** on the Home tab at the top of your screen.

3. Choose the file(s) to import. You can either:

    a. Click **Browse** on the Import tab of the menu, and select the document you want to upload.



    b. Drag and drop files.

4. Select the appropriate **Document Type Group** from the top drop down menu.



5. Select the appropriate **Document Type** from the second drop down menu.

6.     The appropriate file type will be filled automatically based on the file selected for import. **Never change the file type!** Doing so will cause a corrupted import and the document will not be viewable in OnBase.



7.     Enter keyword values. These values will be used to retrieve the document in a search. Keyword fields labeled in red are required in order to import the document.

Many document types are configured with an autofill keyword set which will fill values like name and date of birth based on student or employee ID, for example. After entering the primary value, use tab to expand the autofill.

8. Select **Options** as necessary.



9. Click the **Import** button at the bottom (or on the Import tab of the menu) to upload to OnBase.
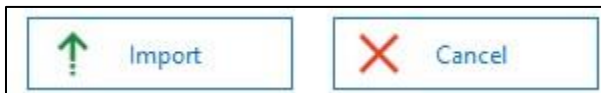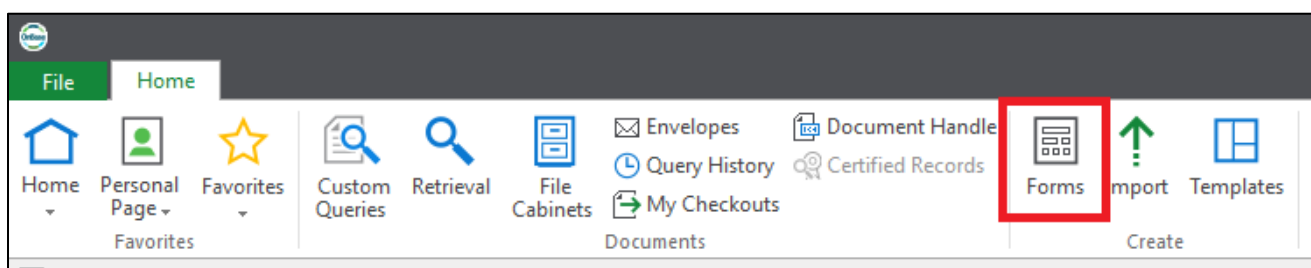


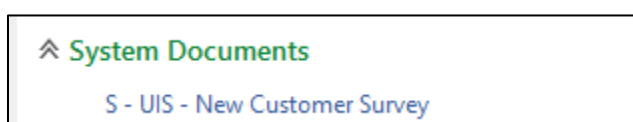10. Your document is uploaded and indexed and can be retrieved within OnBase.
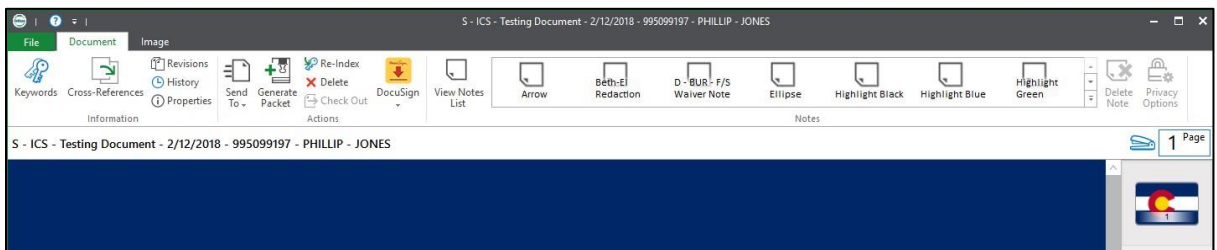


## Submitting Unity Forms

Perform the following steps to create a document by submitting a Unity form in the Unity client.


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1. Click **Forms** on the Home tab of the menu.



2. Choose the desired form from the list at the left.



3. Fill all applicable form fields. Required fields are marked with a red asterisk (*). Please note that forms are interactive and may change as you complete the form.



4. Click the **Submit** button to save the form to OnBase.