

Access the End-User Help Files

The Unity Client includes help files for end-users. These can be referenced at any time in the Unity Client either by pressing the **F1** button on your keyboard, or by clicking the **Help** button:



The help files are opened in a separate window.

Set Your Home Page

The **Home** button takes you to your configured **Home Page**.



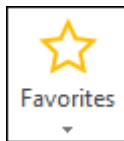
To set a layout to be your Home Page, navigate to the desired layout and select **Make this layout my Home Page** from the Home button drop-down menu.

To reset your Home Page to the default, select **Reset Home Page** from the Home button drop-down menu.

Add Favorites

You can add the currently displayed layout to your list of favorites by performing the following steps:

1. Click the **Favorites** button:



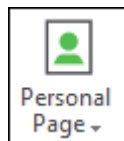
2. Click **Add this layout to my favorites**.

The favorite can be accessed by clicking the Favorites button again and selecting the favorite from the list.

Use the Personal Page

Many OnBase items and layouts can be added to your Personal Page as tiles. Tiles serve as easy access points to the files, items, and interfaces of your choice.

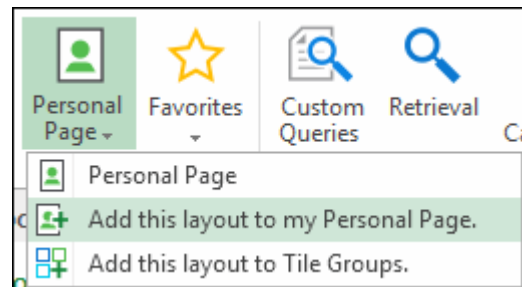
The Personal Page can be opened by clicking the **Personal Page** ribbon button:



Use the Personal Page (Continued)

To add an item or layout to the Personal Page, right-click the object and select **Add To Personal Page**. If the right-click option is unavailable, the Personal Page option may be included under the **Send To** functions or, as is the case with Custom Query results, as a special menu option to **Add to Personal Page**.

When adding an entire layout to your Personal Page, select **Personal Page | Add this layout to my Personal Page** from the ribbon menu.

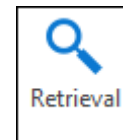


Document Retrieval

You can retrieve documents in the Unity Client based on the document's keyword values, the text contained within the document, or the note information contained on a document. The following example describes how to retrieve documents based on their keyword values.

To access Document Retrieval:

1. In the **Documents** ribbon group on the **Home** tab, click **Retrieval**.



2. In the **Document Retrieval** pane, select a **Document Type Group**.

Select a **Document Type**.

Note: The information contained in the panel may dynamically change based on the Document Type Group or Document Type you selected.

3. If desired, you can specify a date range to only return documents that were created or imported between a certain range of dates.
4. A list of keyword fields displays below the date range.

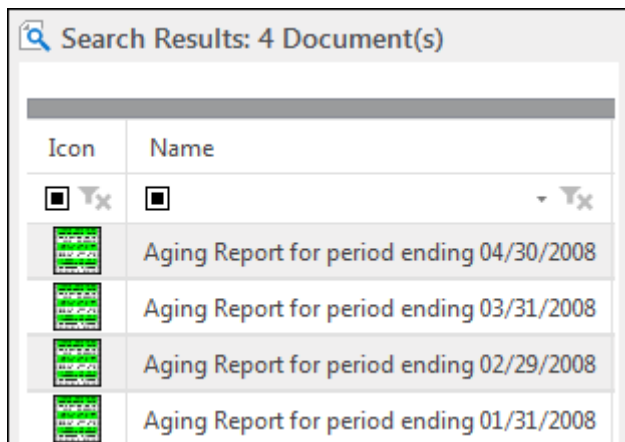
Enter values for the keywords that are displayed. You can enter as much or as little information you know.

Note: Some searches require you to enter at least one keyword value. Search requirements are determined by your system administrator.

5. When you have entered all search criteria, click the **Find** button at the bottom of the panel.

Document Retrieval (Continued)

The **Search Results** are displayed in a list on the right side of the screen.



6. Double-click a document from the list to open it.

Import Documents

To import documents in the Unity Client:

1. In the **Create** ribbon group on the **Home** tab, click **Import**.



The **Import** layout is displayed.

2. Select the document you want to import by doing one of the following actions:

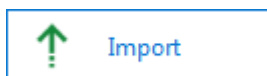
- Browse to the file location of the document you are importing by clicking the **Browse** button,
- Scan a document, or import a document image from another supported digital storage device such as a scanner or camera, by clicking the **Acquire** button,
- If configured, select a document stored or created in Google Drive by clicking the **Drive** button, or
- Drag and drop the file you want to import into the white space next to the **Import** pane.

3. Select a **Document Type Group** for the document.

Select a **Document Type** for the document.

4. Enter all of the necessary keyword values in each field.

5. When you are finished entering the necessary keyword values, click the **Import** button to import the document into OnBase:



Document Separation

Image and PDF documents can be manipulated in the **Document Separation** layout. Documents and their individual pages can undergo multiple editing processes in this layout such as splitting, joining, rotation, and copying. Documents can be deleted or created within Document Separation. Pages can be dragged to different documents, or to an empty area to create a new document.

Document Separation (Continued)



To send one or more documents to Document Separation, select **Split** from the **Re-Index** pane, the **Edit Pages** button in the **Image** tab of an open document, the **Send To | Document Separation** option from the ribbon or right-click menu, or drag and drop the document(s) into an existing Document Separation window.

To switch between **Document Display Mode** and **Page Display Mode**, toggle the **Group by Documents** button:



Keep important pages separate while reorganizing and editing documents by dragging them to the **Page Holder**.

Double-click a page to open it in **Detailed View**, which allows for full-scale viewing, rotation, and flipping.

Click **Join** to join two or more documents through the **Merge Documents**, **Join Pages**, or **Append After Page** options.



Click **Split** to separate a document through the **Split** or **Break into Documents** options.

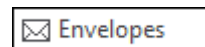


The thumbnails within Document Separation can be adjusted by accessing the **Thumbnail Settings** from the ribbon menu.

Envelopes

Envelopes are collections of documents that you can compile and share with other OnBase users. Any document can be put into an envelope, regardless of content or Document Type.

Envelopes can be created and viewed by clicking the **Envelopes** ribbon button on the **Home** tab.



Select an envelope to view its contents.

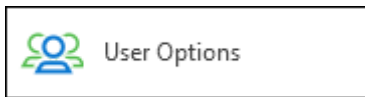
If you would like to share an envelope with other users, select the desired envelope and click **Share Envelope**.



Selected Users are the users sharing the envelope with you. Users can have **Full Control** over the envelope, can be permitted to **Add to Envelope** and/or **Remove from Envelope**, or can just be allowed to view the envelope contents. Adjust user permissions as needed.

User Options

System functionality and appearance can be customized in the **User Options**. The User Options dialog is accessed through the **User Options** button in the **File Menu**.



General Unity Client behavior and display features, **Document** display options, **Document Import** options, **Printing** options, **Retrieval Date** options, and **Service Mode** options can be set here.

Note: The Service Mode tab is only available when the Unity Client is running in Service Mode.

Note: Some User Options may be enforced by an administrator-designated **User Option Policy**.

To apply User Options:

1. Select the desired options in each tab. Selection controls for options vary (check boxes, text fields in which you can insert a number or date range, etc.).
2. After you have selected the appropriate options, click **Save** to save your changes and to close the User Options dialog.

Generate CSV Files

Document Search Results lists can be exported as .csv files. CSV files can contain metadata pertinent to the documents included. Keywords, DocPop URLs, and Document Dates are examples of information fields that can be included in your CSV output.

Note: CSV files cannot be generated from Full Text Search result lists.

To generate a CSV file:

1. Right-click within a Document Search Results list and select **Generate CSV File**. The **Generate CSV File** window is displayed.
2. Configure your file as desired. The document **Range** and resulting **Columns** within the CSV file can be adjusted here.
3. In the **Save to File** field, enter the name and location that will be used to save the CSV file. You can select **Browse** to navigate to the correct location.
4. Click **Launch Associated Application** if you would like to view the CSV file after you click **Generate**. The file will be opened by your default CSV application.
5. Click **Generate**. The CSV file has been created at the specified location.

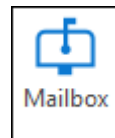
Or click **Cancel** to cancel the process and return to the search results list.

Send Mail

Internal mail messages can be sent to other OnBase users. Documents and folders can be sent within the Unity Client to other users. If you need to send documents to non-OnBase users, external mail messages can contain documents as attachments, or can include documents, folders, Custom Query Results, E-Forms, and Unity Form Creation pages as **Unity Pop Links** or **Unity Pop Files**. Recipients of Unity Pop Links and Files must be OnBase users.

Send To | Internal User

Selecting this option will allow you to send the selected or open document or folder to another OnBase user. A new mail message dialog is displayed and recipients, attachments, and message body text can be edited as needed.



Received internal mail messages can be checked by clicking the **Mailbox** button in the ribbon menu.

Send to | Mail Recipient

Selecting one of the two Mail Recipient options will allow you to send the selected or open item to a user outside of OnBase.

Note: A functional, supported email client is required to send OnBase items externally.

Selecting **Send to | Mail Recipient (as Attachment)** will attach the document(s) to a new message dialog in your configured external email client.

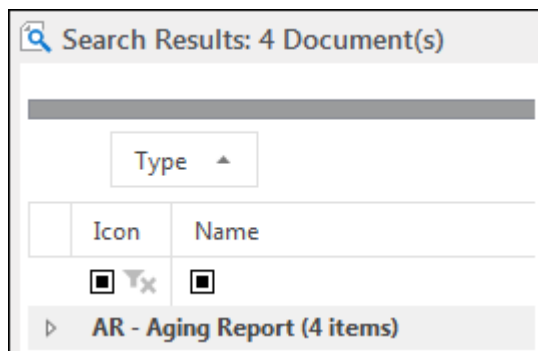
Selecting **Send to | Mail Recipient (as Link)** opens a blank email message containing a link to the item(s) or XML file that references the content in OnBase, depending on your configuration.

Document List Organization

Document lists can be organized to better suit your needs. Lists can be organized through grouping, sorting, column reordering and stacking, and filtering through operators and drop-down lists.

Grouping

Drag a column heading to the space above a data list to group the list by that column.



Document List Organization (Continued)

Sorting

Lists can be sorted by column values. Click on a column heading to sort the list in descending order. Click the column heading again to sort in ascending order.

Type	Date
AR - Aging Report	1/31/2008
AR - Aging Report	2/29/2008

Reordering and Stacking Columns

Click and drag a column to the area between two columns to move it to that location:

Date	Type
AR - Aging Report	AR - Aging Report

Click and drag a column onto the header of a different column to stack the columns:

Type	Date	Date
AR - Aging Report	1/31/2008	
AR - Aging Report	2/29/2008	

Document List Organization (Continued)

Filtering

The Custom Queries, Document History, Document Retrieval, Mailbox, and Users layouts support filtering. Operators, drop-down lists, and custom filters are available methods of list filtering.

Click the operator button in the desired column to view available operators:

Users	
ID	
1	
101	
103	

Click the drop-down list arrow to view available drop-down list options:

Users	
ID	
1	

Note: Operator and drop-down list options vary by column.

Select **Custom** from a drop-down list to open the **Custom Filter Selection** dialog box. You can create your own data list filter using conditions and operators.

Note: For each shortcut, press all keys at the same time.

Global	
Alt	When on the Home tab, shows shortcut keys for the ribbon tabs and File menu. Note: The functionality of shortcuts using Alt may vary depending upon the active window, tab, or pane.
F1	Accesses the help files.
Alt + Space	Opens the system menu for minimizing, maximizing, and restoring the program.
Alt + F4	Closes the program.

Main Window	
Ctrl + M	Opens the Home layout.
Ctrl + Q	Opens the Custom Queries layout.
Ctrl + R	Opens the Document Retrieval layout.
Ctrl + E	Opens the Forms layout.
Ctrl + N	Opens the current layout in a new window.
F8	Opens the Import layout.

Data Lists	
Ctrl	Hold to select multiple items in a list.
Ctrl + A	Selects all items in a list.
Ctrl + Shift + End	Selects all items below the selected item in a list, including the selected item.
Ctrl + Shift + Home	Selects all items above the selected item in a list, including the selected item.

Keywords	
F3	Changes the operator for the selected Keyword Type.
F4	Changes the connector for the selected Keyword Type.
F5	Shows the drop-down list for the selected Keyword Type.
F6	Adds another value for a Keyword Type.
Ctrl + O	Collapse or expand any Multi-Instance Keyword Type Group.

Re-Indexing	
Esc	Closes the Re-Index pane.

Import Layout	
Ctrl + O	Opens the Browse dialog box.
Ctrl + S	Uploads the document.
Esc	Cancel the upload and clears the Import pane.
Ctrl + Shift + Up Arrow	Moves the page selected in the Preview pane up one position in the page order of the document.
Ctrl + Shift + Down Arrow	Moves the page selected in the Preview pane down one position in the page order of the document.

Import Layout	
Delete	Removes the page selected in the Preview pane from the document.
Ctrl + Delete	Removes all pages from the document.
Ctrl + Left Arrow	Rotates the page selected in the Preview pane counterclockwise.
Ctrl + Right Arrow	Rotates the page selected in the Preview pane clockwise.

Document Viewer	
Ctrl + H	Opens the Document History dialog box.
Ctrl + P	Opens the Print pane.
Ctrl + K	Opens the Add/Modify Keywords pane.
Ctrl + W	Opens the Cross-References pane.
Ctrl + U	Toggles the thumbnail display.
Ctrl + O	Toggles text overlay when working with image documents.
Ctrl + Mouse Wheel Up or Ctrl and +	Zooms in on the document. Note: Ctrl + is not usable when working within a text document. Use the Ctrl Mouse Wheel Up shortcut to zoom in on text documents.
Ctrl + Mouse Wheel Down or Ctrl and -	Zooms out on the document. Note: Ctrl - is not usable when working within a text document. Use the Ctrl Mouse Wheel Down shortcut to zoom out on text documents.
Mouse Wheel Up / Page Up / Up Arrow	Navigates up through pages in a multi-page document.
Mouse Wheel Down / Page Down / Down Arrow	Navigates down through pages in a multi-page document.
Ctrl + Page Up or F11	Displays the previous page in a multi-page document.
Ctrl + Page Down or F12	Displays the next page in a multi-page document.
Ctrl + Home	Displays the first page in a multi-page document.
Ctrl + End	Displays the last page in a multi-page document.
Ctrl + Shift + Page Up	Displays the previous document in the Document Search Results list.
Ctrl + Shift + Page Down	Displays the next document in the Document Search Results list.
Ctrl + G	Opens the Go to Page dialog box.
Ctrl + Right Arrow	Rotates the currently selected pages 90 degrees clockwise.
Ctrl + Left Arrow	Rotates the currently selected pages 90 degrees counterclockwise.

Document Viewer	
Ctrl + Down Arrow	Rotates the currently selected pages 180 degrees.

Document Separation	
Delete	Deletes selected pages.
Esc	Exits the Document Separation layout without saving changes.
Ctrl + S	Saves selected documents.
Ctrl + H	Flips selected pages horizontally.
Ctrl + .	Rotates selected pages 90 degrees clockwise.
Ctrl + ,	Rotates selected pages 90 degrees counterclockwise.
Ctrl + J	Joins selected pages. Note: This operation is only used in Page Display Mode.
Alt and +	Copies the selected document.
Ctrl and +	Copies selected pages in a new document.
Ctrl and Shift and +	Copies the selected pages.
Ctrl + C	Copies individual pages to the clipboard.
Ctrl + X	Cuts individual pages.
Ctrl + V	Pastes individual pages.
Shift + Click	Selects all pages between two selected pages. Shift must be held while clicking.
Ctrl + Click	Selects or deselects a page without deselecting other pages or documents.
Ctrl + Drag	Copies the page being dragged and dropped instead of moving the page to the new insertion point. Note: This operation is only used in Document Display Mode.
Ctrl + Shift + Click	Selects multiple page ranges in multiple documents. These buttons must be held while clicking. Note: This operation is only used in Document Display Mode.
Ctrl + Delete	Enters Delete Mode .
Alt + Home	Scrolls to the first selected page of a document, if not already in view.
Up Arrow / Page Up	Scrolls up in the Separation Workspace. Note: This operation is only used in Document Display Mode.
Down Arrow / Page Down	Scrolls down in the Separation Workspace. Note: This operation is only used in Document Display Mode.
Ctrl + Mouse Wheel Up	Zooms in on the page open in Detailed View.
Ctrl + Mouse Wheel Down	Zooms out on the page open in Detailed View.

Document Separation	
Ctrl + Left Arrow	Rotates the page open in Detailed View 90 degrees counterclockwise.
Ctrl + Right Arrow	Rotates the page open in Detailed View 90 degrees clockwise.