

# How to Use OnBase Unity Client

This is a “How To” guide for using OnBase Unity Client. It’s intended for a new user of the OnBase Unity Client.

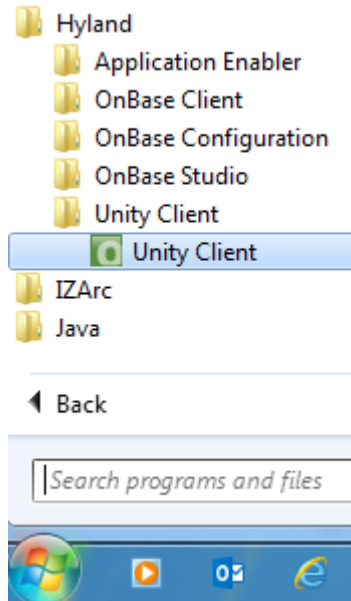
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## Accessing the OnBase Unity Client from a PC

If you've been asked to use OnBase Unity Client, you can access the OnBase Unity Client from your PC two ways. One way is via the OnBase Unity Client **INSTALLED** on your PC, see # 1 below. The other is via **CougarApps**, see the next section.

1. Check to see if the OnBase Unity Client has been **INSTALLED** on your computer in a couple different areas, depending on any shortcuts that have been created.
  - a. Click on the Start Button, All Programs, Hyland, Unity Client, Unity Client.



- b. Click the Unity Client icon on the desktop.



- c. Click the Unity Client icon on the taskbar.



## For Mac users or Remote Access use CougarApps

1. Please use CougarApps, <http://www.csusm.edu/cougarapps/>.
2. After logging into CougarApps:
  - d. The user will need to add OnBase Unity Client by clicking the '+' sign on the right side of the screen.
  - e. The user will see the available options and will click on 'OnBase' and then 'Unity Client'.



- f. The Unity Client will now be on the CougarApps desktop. Click the icon and wait for CougarApps to launch the application.

## Logging into Unity Client

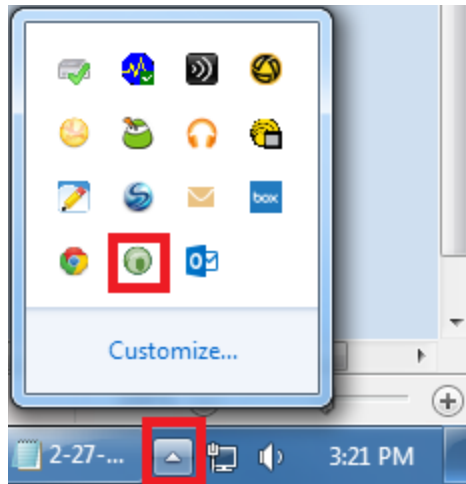
1. User will login with their CSUSM username and password.



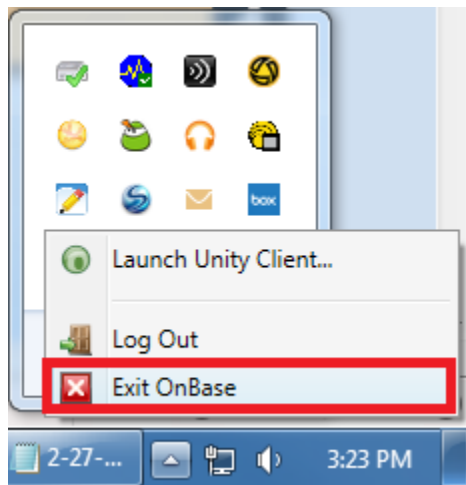
## Exiting the Unity Client

### Unity Client with OnBase Add-ins Installed

1. Go to the bottom right of your computer desktop by the clock and click on the 'up arrow' button.
2. Right click on the OnBase icon, see picture below.

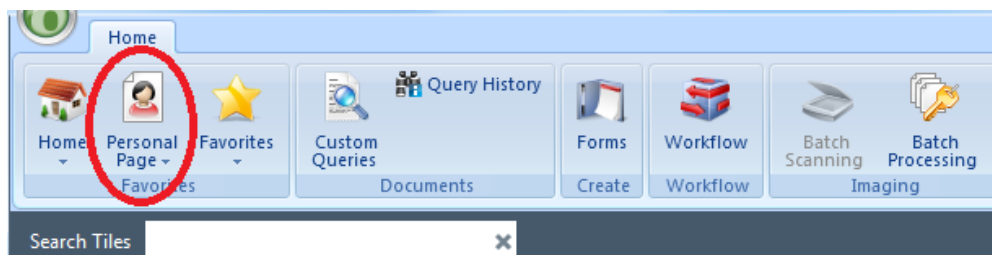
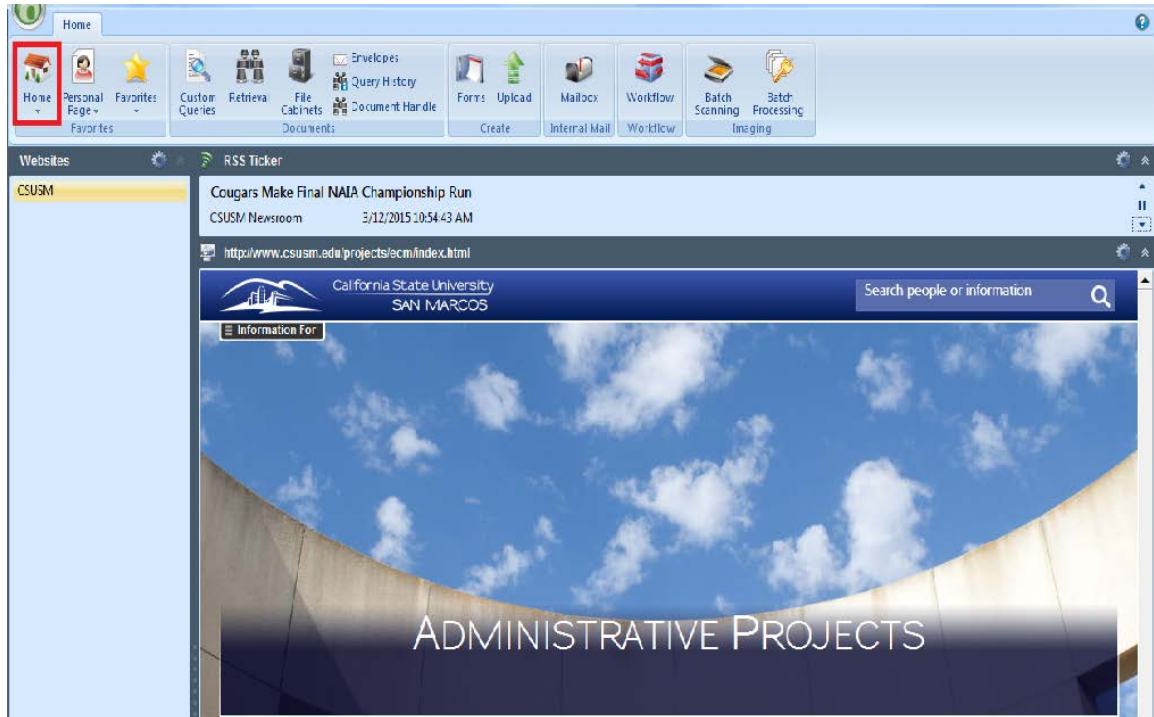


3. Click on 'Exit OnBase'.



## Customizing the Unity Client

1. Logging into the Unity Client the user will be defaulted to the 'Home Page'. The user should take a moment and customize both the 'Home Page' and 'Personal Page'.

A screenshot of the Unity Client interface focusing on the 'Personal Page' menu. The 'Personal Page' icon is circled in red. Below the navigation bar is a 'Search Tiles' search box.

Your Personal Page does not currently have any shortcuts. You can easily add shortcuts to layouts, forms, documents, workflow queues and many other features to your Personal Page.

When you are on a layout, you can add that layout to your Personal Page from the Personal Page menu on the Home tab. Other features, such as documents and workflow queues can be added to your Personal Page with a simple right click.

## Customizing your 'Personal Page'

We suggest that you add anything that you will be working on to your 'Personal Page'.

### ePAN Form

1. Click on 'Forms' in the top Ribbon bar.
2. Right click on any available Forms that you have access in the left side of the screen (i.e. 'HR ePAN') and click 'Add to Personal Page'.
  - a. This will add a 'Tile' to your 'Personal Page'.

### Workflow (Only certain Users will have access)

1. Click on 'Workflow' in the top Ribbon bar and the 'Workflow' page will load.
  - b. Click on the 'Home' tab at the very top of the page
  - c. Click on the down arrow of the 'Personal Page' icon in the top Ribbon bar and click 'Add this layout to my personal page.'
2. Right click on the 'queue' that you have access in the left side of the screen (i.e. 'ePAN - Payroll') and click 'Add to Personal Page'.
  - a. This will add a 'Tile' to your 'Personal Page'.

### Custom Queries

1. Click on 'Custom Queries' in the top Ribbon bar.
2. Right click on any of the available Custom Queries that you have access in the left side of the screen (i.e. 'ePAN – Document Retrieval (Custom Query)') and click 'Add to Personal Page'.
  - a. This will add a 'Tile' to your 'Personal Page'.

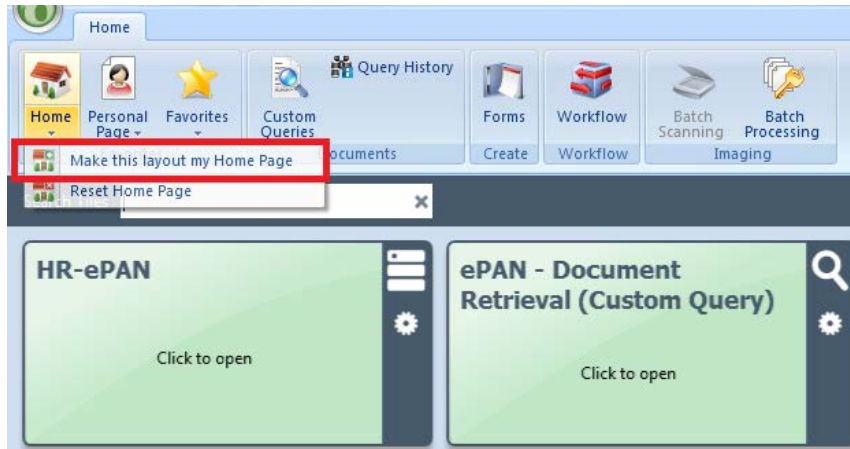
### Document Retrieval

1. Click on 'Retrieval' in the top Ribbon bar.
2. Click on the down arrow of the 'Personal Page' icon in the top Ribbon bar and click 'Add this layout to my personal page'.
  - a. This will add a 'Tile' to your 'Personal Page'.

## Customizing your 'Home Page'

We also suggest that you make your 'Personal Page' your 'Home Page'.

1. Click on 'Personal Page' in the top Ribbon bar.
2. Click on the down arrow of the 'Home' icon in the top Ribbon bar and choose 'Make this layout my Home Page'.
3. You will now see your 'Personal Page' when logging into Unity Client.



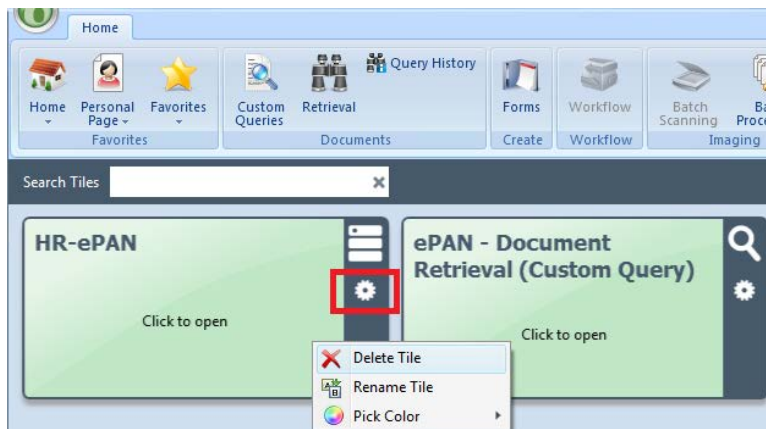
## Reset your 'Home Page'

\*\* You don't need to do this when setting up the Unity Client. This is just an FYI.

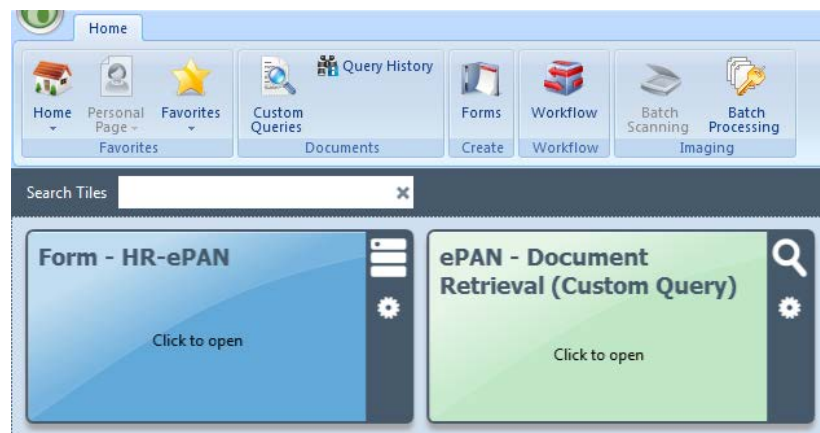
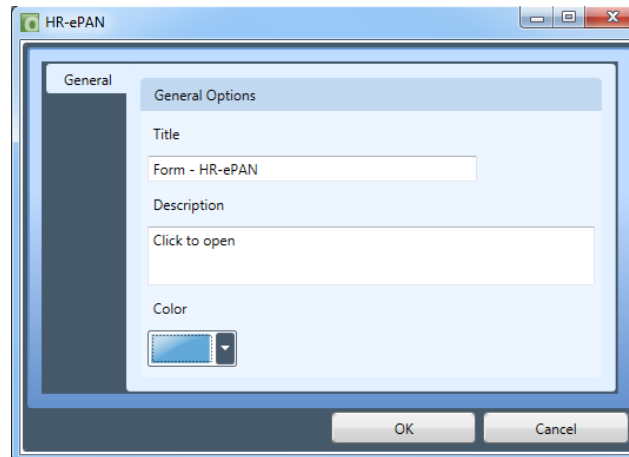
1. Click on the down arrow of the 'Home' icon in the top Ribbon bar and choose 'Reset Home Page'.

## Changing the Name, Description and/or Color of the 'Tile' on the 'Personal Page'

1. From the 'Personal Page', look for the 'Tile' you want to change and either click the icon that looks like a gear or sprocket or right click and select an option.



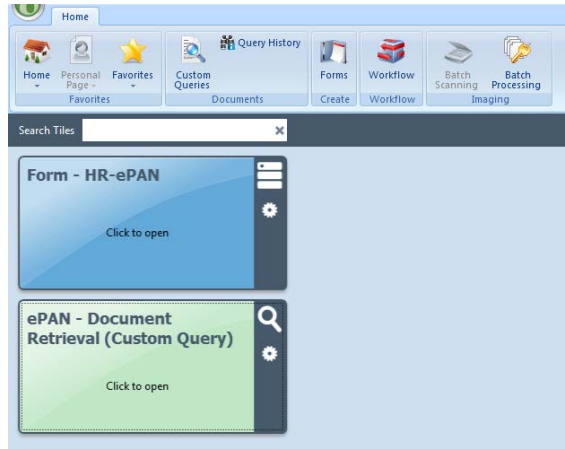
2. If you clicked on the icon that looked like a gear or sprocket, you will see a new screen to change the Name, Description and/or Color of the ‘Tile’.
- a. Make any changes you want and click the ‘OK’ button.



### Changing the Location and/or Order of the ‘Tiles’ on your ‘Personal Page’

1. From the ‘Personal Page’, look for the ‘Tile’ you want to change Location and/or Order and click AND hold the icon in the bottom right corner.
2. Drag the ‘Tile’ where you would like to see it and let go of the click.
3. You will now see the ‘Tile’ in the new Location and/or Order.





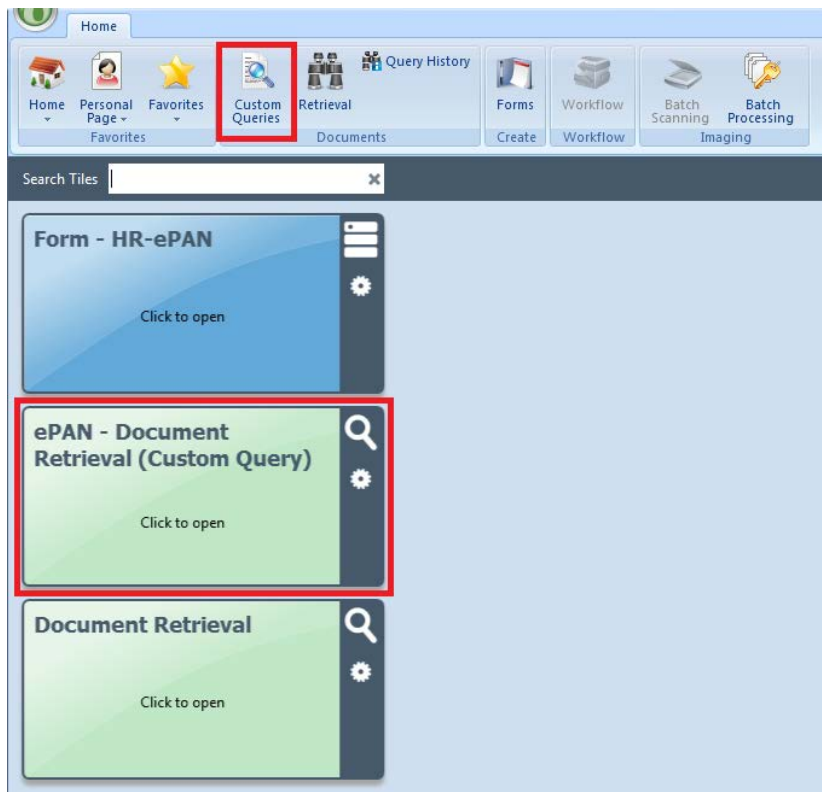
## Finding Documents

Finding documents can be done in many ways.

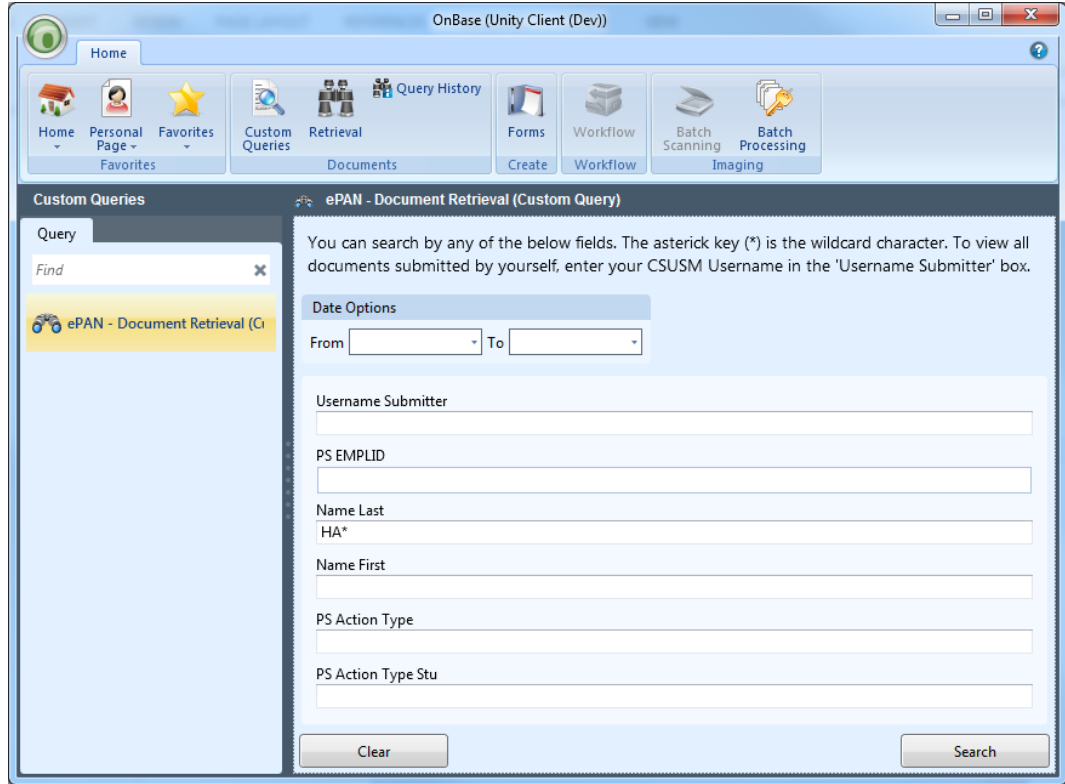
### Custom Queries

Custom Queries are specific queries or reports that have been prepared in advance by the OnBase Administrator.

1. Access 'Custom Queries' from the 'Home' or 'Personal Page'.

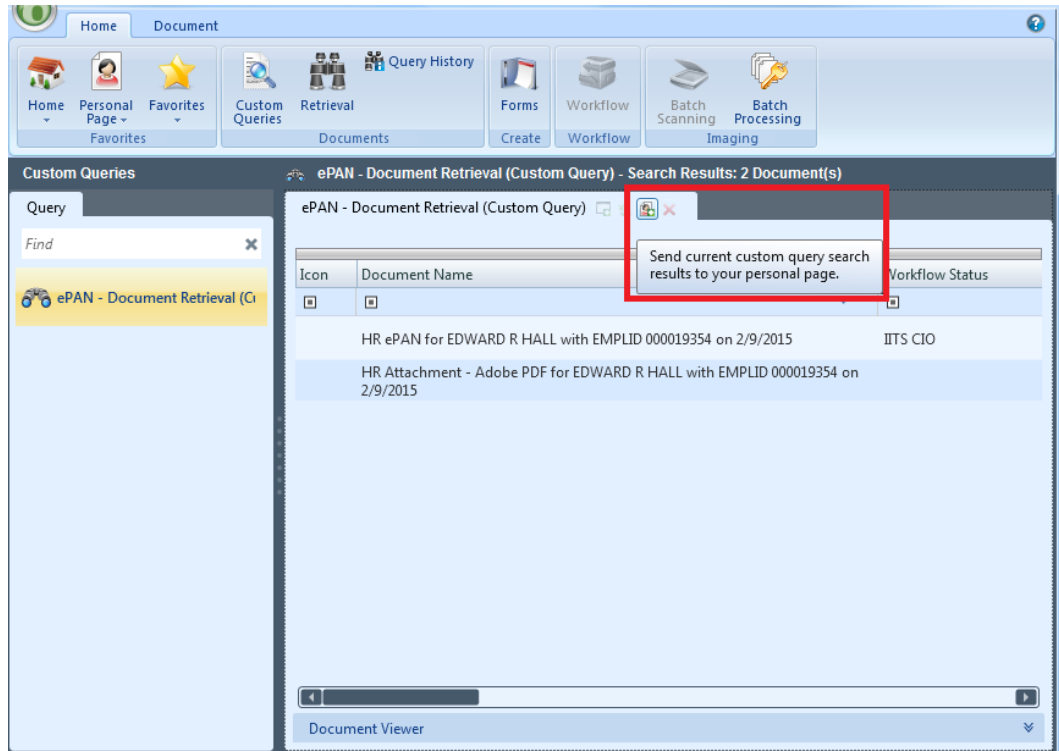


- d. You can search based on a subset of all the available keywords of the document.
- e. The asterisk key (\*) is the wildcard character. The example below is searching for 'PAN Employee's Last Name' starting with the letters 'HA'.



### Saving User Created Query to 'Personal Page'

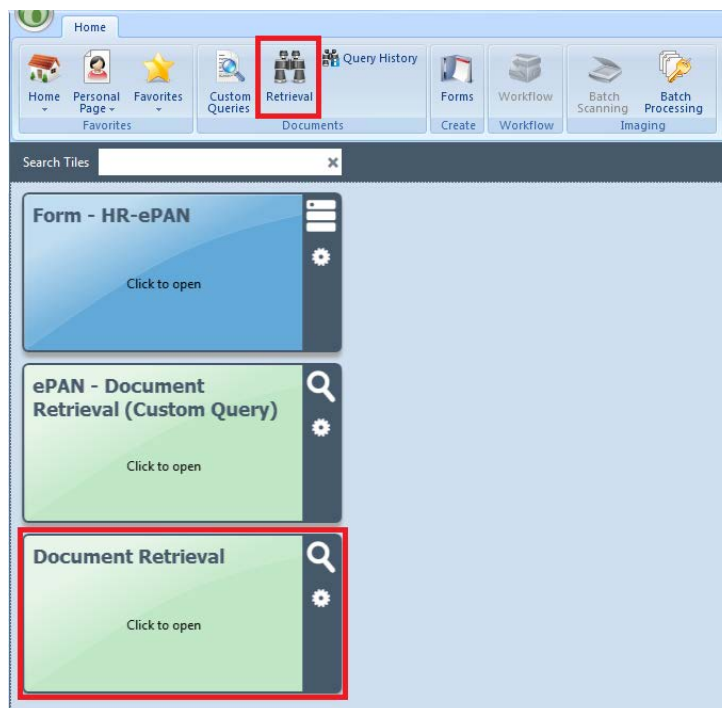
1. If you find that you like a specific query and want to save it to your 'Personal Page', click the icon next to the delete icon in the tab name, see below.



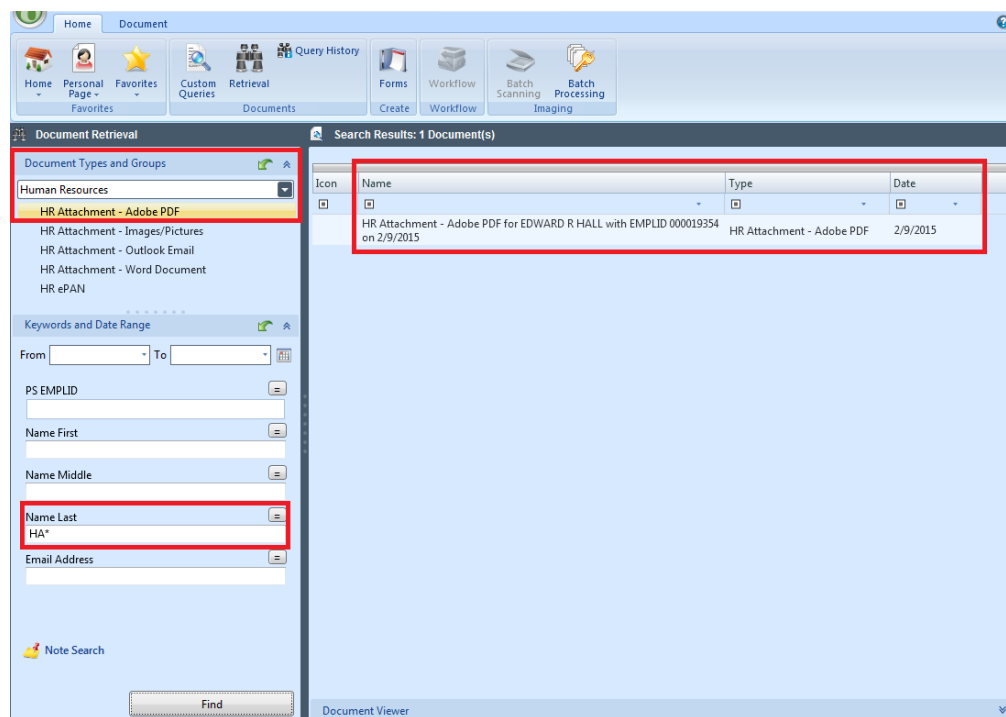
## Document Retrieval

Document Retrieval is similar to a Custom Query, but with less options.

1. Access 'Retrieval' from the 'Home' or 'Personal Page'.



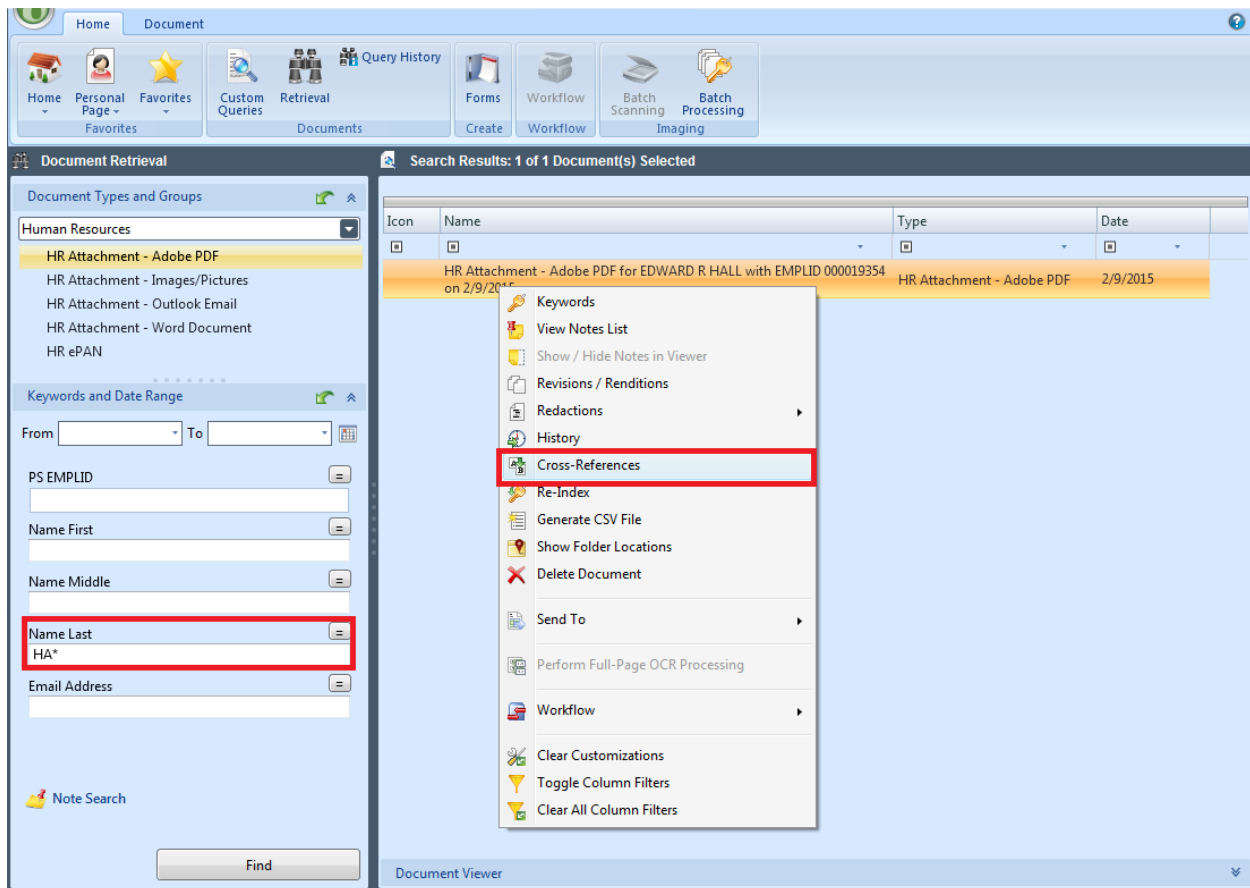
3. You can search based on a couple of things:
  - a. Document Type and Groups - This example is specific for HR document types.
  - b. Keywords – Each Document Type has its own set of Keywords.



## Cross References

Cross References are used to quickly and easily find Documents that are related to each other, by having identical Keyword(s). You can check for Cross Reference Documents from 'Custom Queries', 'Retrieval' or when viewing the Document itself.

1. Cross Reference Documents from 'Custom Queries' or 'Retrieval'.
  - a. Do a 'Find' for a specific Document.
  - b. Right click on the Document you want to Cross Reference.
  - c. Select 'Cross-References'.



2. Cross Reference Documents when viewing the Document itself.
  - a. View a Document.
  - b. Click on the 'Cross-References' icon in the Ribbon bar.
  - c. Select any document in the right hand screen that is a 'Cross Reference'.

Document

Keywords Cross-References Revisions History

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Information Actions Notes

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**Cross-References**

**Document Type**  
HR Attachment - Adobe PDF

**Document**  
HR Attachment - Adobe PDF for EDWARD R HALL with EMPLID 000019354 on 2/9/2015

Acc	Name	Type	Date
	HR ePAN for EDWARD R HALL with EMPLID 000019354 on 2/9/2015	HR ePAN	2/9/2015

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