

OnBase[®]

a Hyland Software solution

OnBase Quick Reference Guide

Unity Client Retrieval

For OnBase 10.0

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1. Starting OnBase

To login to OnBase:

Locate and Double-Click the Unity Client shortcut



Unity Client

Enter your Username and Password and click Login. Make sure you have the domain set to MUAD not MU_DOMAIN.

A screenshot of the OnBase login window. The window has a blue gradient background. At the top left, the text "OnBase" is displayed in a large, bold, green font, with "a Hyland Software solution" in a smaller, italicized font below it. In the bottom left corner, there is copyright information: "Copyright © 1992 - 2012 Hyland Software, Inc. All Rights Reserved. Build Version 11.0.1.118". On the right side, there are three input fields. The first field is labeled "MUAD" and contains the text "MUAD". The second field is labeled "USERNAME" and contains the text "USERNAME". The third field is empty. To the left of these fields are three icons: a globe, a group of people, and a padlock. At the bottom right, there are two buttons: "Login" and "Cancel".

2. Unity Home Page

Once you have successfully logged into the system, you are presented with a Home Page, which may include your organization's webpage, as well as an RSS Feed related to your organization or industry. This Home Page layout is user-configurable, and can be easily changed to other screens in OnBase, such as Custom Queries, Document Retrieval, and Workflow, among others.



To Access this Home Page from anywhere in OnBase, click the Home button at the top left of the screen.



To set a new Home page layout, click the Down Arrow beneath the Home button, and select 'Make this layout my Home Page'. You can always reset to the default Home Page by selecting 'Reset Home Page'.

3. Document Retrieval by Custom Query

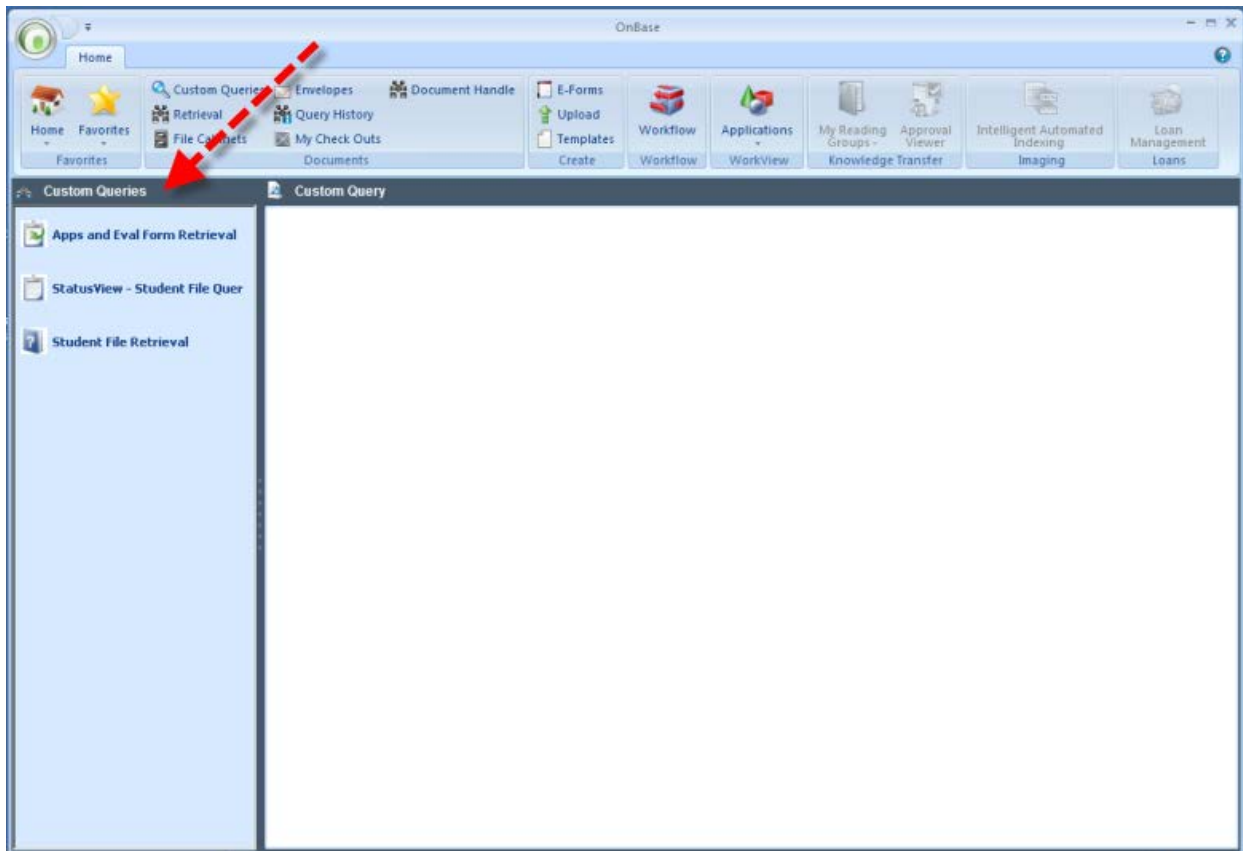
A **Custom Query** can be developed to allow users to more easily retrieve documents that exist within OnBase. This allows the user to find the specified documents using a pre-defined form and limits the criteria needed to perform the search.

To perform a custom query:

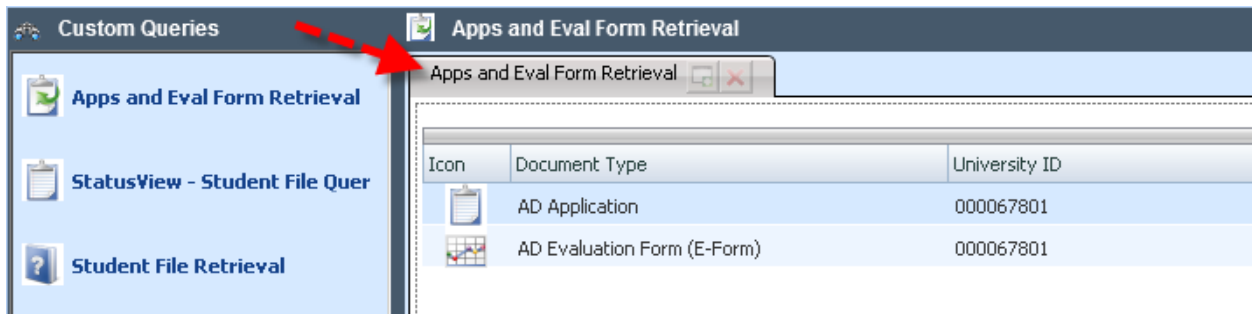
Click **Custom Queries** in the ribbon



Select a **Custom Query** from the pane on the left. The query will open to the right.

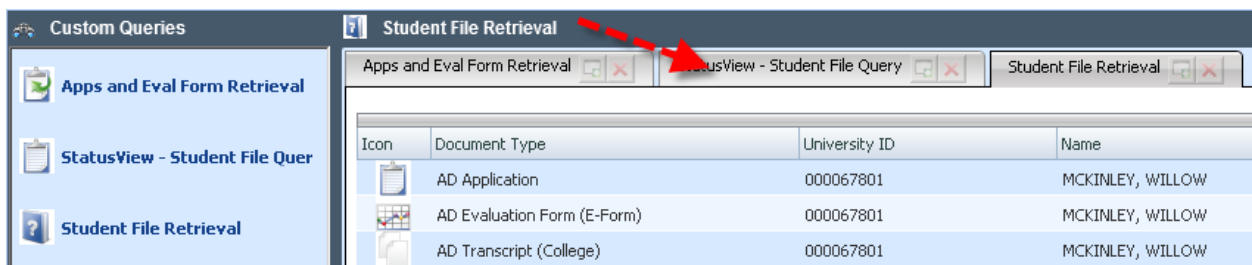


Enter the appropriate search criteria and Press the Enter key, or click the search button configured on the Customer Query. Your search result(s) will be displayed on a tab.



Double-click on a document to view it.

When you conduct multiple Custom Queries, results for each Custom Query are retained on their respective tabs for future use.



NOTE: Results are retained for the duration of your OnBase session.

A tab contains the following buttons:



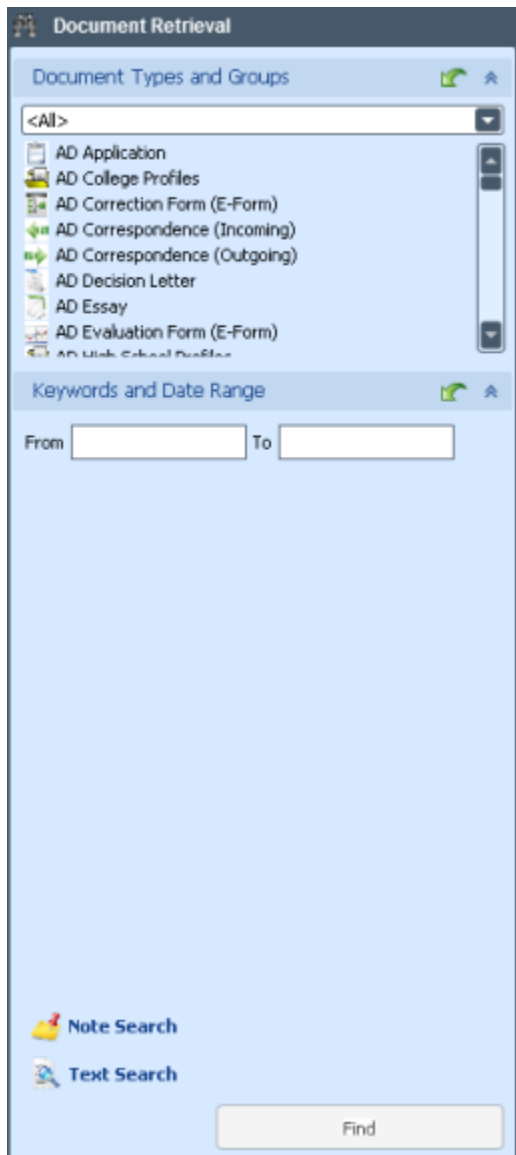
Click to open the Custom Query results in a new window.



Click to close the Custom Query results. These results will no longer be available.

4. Document Retrieval by Document Type

To Access Document Retrieval, click the **Retrieval Icon**. The Document Retrieval pane will open to the left.



Document Types and Groups –

1. Select a Document Type Group and/or Document Type(s).
2. (Optional) Provide other search parameters (such as a date range and/or Keyword Values). See the following sections for further information:
 - Retrieval by Keyword Value on page 12
 - Retrieval by Document Date on page 16
 - Retrieval Using Note Search on page 18
 - Retrieval Using External Text Search on page 20
3. Click **Find**.

NOTE: You need user rights to access the Document Retrieval layout and to view documents. If you have any problems, see your system administrator.

NOTE: Depending on your configuration, you may not be able to perform searches without providing some search parameters.

Date Range – Define specific date or range of dates based on the document date of the document. A specific date can be selected from the drop-down arrow.

Keywords – Enter specific *Keywords* to narrow document searches. The Keyword edit fields will change depending on the *Document Type* selected.

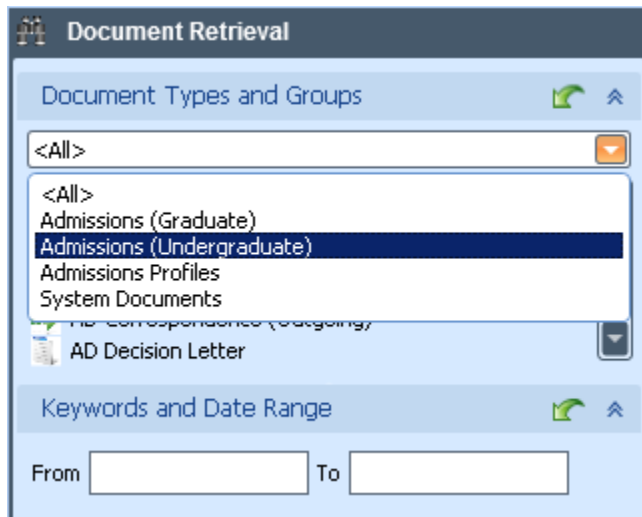
Note Search – Search documents for notes. You can limit your search by Document Type, Keyword Value, Note Type, note text, note creation date, and the note creator.

Text Search – Find specific text in a text-based document assigned to a Document Type or Document Type Group.

To retrieve **all** documents in the system under a particular Document Type:

NOTE: This type of blind search is only possible under certain configurations, as it may inhibit system performance for other users by putting a strain on the database.

Select a Document Type Group. You will now see a list of Document Types for the selected Document Type Group.



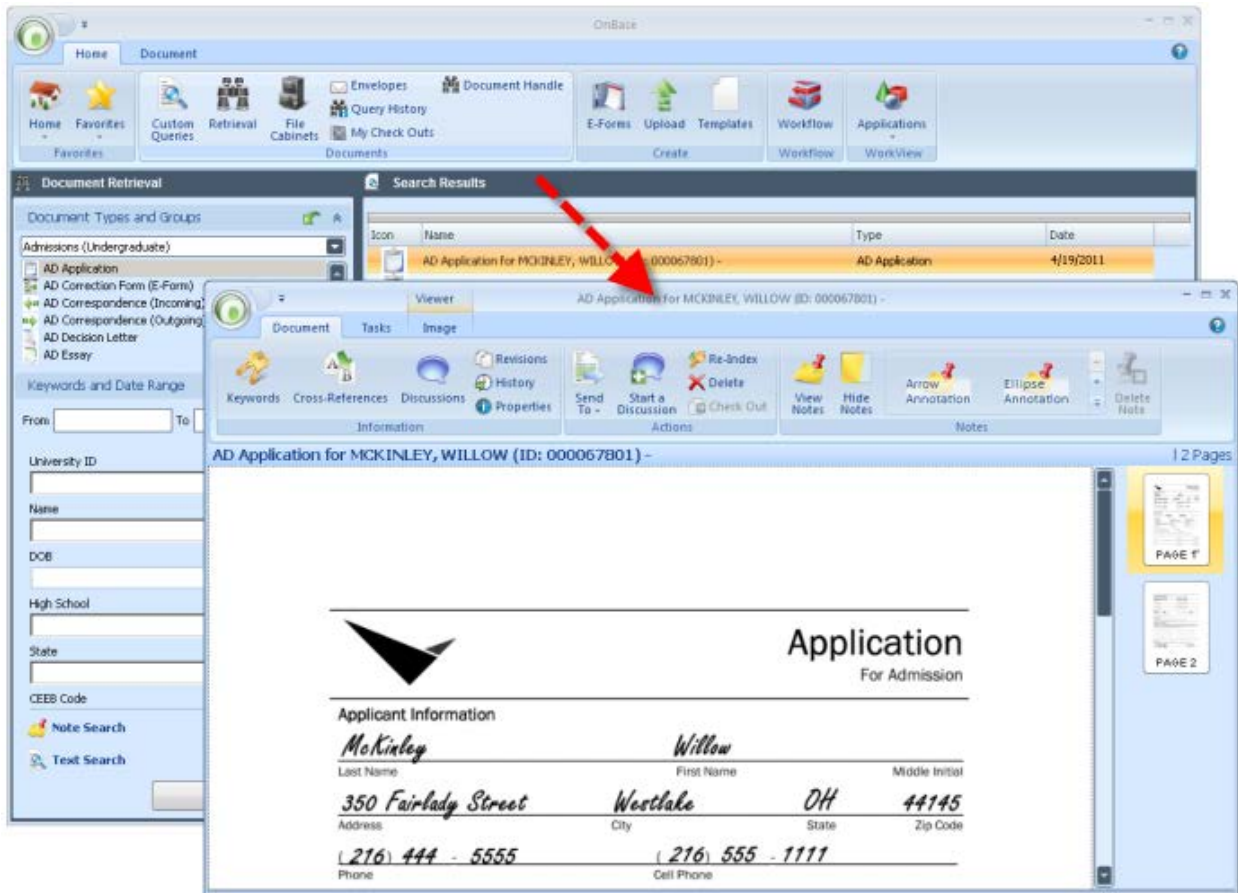
Select the Document Type(s) to retrieve.

Click Find to execute the search. The **Document Search Results** will display to the right.

The screenshot shows the 'Search Results' window. It contains a table with the following columns: 'Icon', 'Name', 'Type', and 'Date'. The table lists several 'AD Application' documents. The first row is highlighted in orange.

Icon	Name	Type	Date
	AD Application for MCKINLEY, WILLOW (ID: 000067801) -	AD Application	4/19/2011
	AD Application for ADAMS, JOHN (ID: 000067797) -	AD Application	4/19/2011
	AD Application for MCKINLEY, WILLIAM (ID: 000067795) - APP IN	AD Application	4/19/2011
	AD Application for STEPHENSON, KATELYN ROSA (ID: 4066) -	AD Application	8/21/2009
	AD Application for STUDENT, JOE (ID: 999999998) -	AD Application	5/27/2009
	AD Application for ADAMS, JOSE (ID: 0000096598) -	AD Application	5/27/2009

Double-click on a document in the results hit list. The document will open in a new window.



5. Document Retrieval by Keywords

A Keyword is an identifying piece of information used to locate documents stored within the electronic document imaging system.

To retrieve documents by keyword values:

The screenshot shows the 'Document Retrieval' window. The 'Document Types and Groups' section is set to 'Admissions (Undergraduate)'. The 'Keywords and Date Range' section is circled in red. Below it, there are fields for 'From' and 'To' dates. The search criteria are as follows:

Field	Value
University ID	000067795
Name	MCKINLEY, WILLIAM
DOB	1/29/1943
High School	ONBASE HIGH
State	OH

At the bottom, there are buttons for 'Note Search', 'Text Search', and a large 'Find' button.

Select a Document Type Group

Select the Document Type(s) to retrieve

NOTE: If multiple Document Types are selected, only the common Keyword Types for those Document Types appear.

Enter a keyword value into one or more fields. The more information entered the more specific the search will be.

Click Find to execute the search. All of the documents in OnBase for the selected Document Type that have the keyword value(s) indicated are displayed in the Document Search Results window.

Double-click on a document to view it.

Keywords and Date Range

From To

Student ID

Name JACKSON, ANDREW

Name

DOB

Status

Note Search

Text Search

Find



NOTE: Click on the keyword label (or within the keyword box press F6) to add additional search fields of the same keyword type. **Example:** You would like to search for the essays for students Bryan Chin and Chris Stone. In order to search for both last names, click on the last name keyword label and be sure to click on the AND operator to change it to OR.

6. Keyword Operators and Wildcards

The Keyword Type Edit Field default property = (equal to) will appear in a box on the right side of each Keyword Type Edit Field, and the default binary operator, AND will appear in a box on the right side of each Keyword Type Edit Field when multiple search fields have been activated for a Keyword in the Document Retrieval dialog box.

If you left-click the = operator, it will act as a toggle switch and allow you to toggle through the following choices (choices vary depending on the format of the Keyword, i.e. date, alphanumeric, currency, etc.)

	Equal To allows you to search for keyword values that are an exact match to what is entered for retrieval.
	Not Equal To allows you to search for keyword values that are not equal to the keyword value entered for retrieval.
	Double Quotes returns only those documents containing the literal entry.
	Greater Than allows for the retrieval of documents with keyword values greater than the numeric or date value entered for retrieval.
	Less Than allows for the retrieval of documents with keyword values less than the numeric or date value entered for retrieval.
	Greater Than/Equal To allows for the retrieval of documents with keyword values greater than or equal to the numeric or date value entered for retrieval.
	Less Than/Equal To allows for the retrieval of documents with keyword values less than or equal to the numeric or date value entered for retrieval.
F6	F6 opens a second entry field for the active keyword. You can also click on the keyword label.
	And allows for searching two or more values of the same keyword type that exists on the selected document type.

	Or allows you to search either one (or more) documents containing either one or more specific keyword types. Click And to change to Or.
	To allows you to search from one keyword to another keyword of the same keyword. Used with Numeric or Date keywords.

Wildcards

Combined with keyword values can be used to retrieve documents.

*	Replaces multiple characters. (ADAMS* would retrieve ADAMS, ADAMSON, ADAMSTON, etc.)
?	Replaces a single character. (SM?TH would retrieve SMITH, SMYTH, SMOTH, etc.)

7. Document Retrieval by Date Range

Select a Document Type Group. You will now see a list of Document Types for the selected Document Type Group.

Select the Document Type(s) to retrieve

Enter a date range in the **From** and **To** fields

Document Retrieval

Document Types and Groups

Admissions (Undergraduate)

- AD Application
- AD Correction Form (E-Form)
- AD Correspondence (Incoming)
- AD Correspondence (Outgoing)

Keywords and Date Range

From 4/1/2011 To 04/30/2011

University ID

Name

DOB

High School

Note Search

Text Search

Find

NOTE: Click the arrow to the right of the date field in order to select the day, month, and year from a calendar.

Keywords and Date Range

From 04/01/2011 To 4/30/2011

April, 2011

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Today: 5/13/2011

Click Find

All of the documents in OnBase for the selected Document Type that have a Document Date within the date range indicated in the search parameters will be displayed in the **Search Results** window.

Double-click on a document to view it.

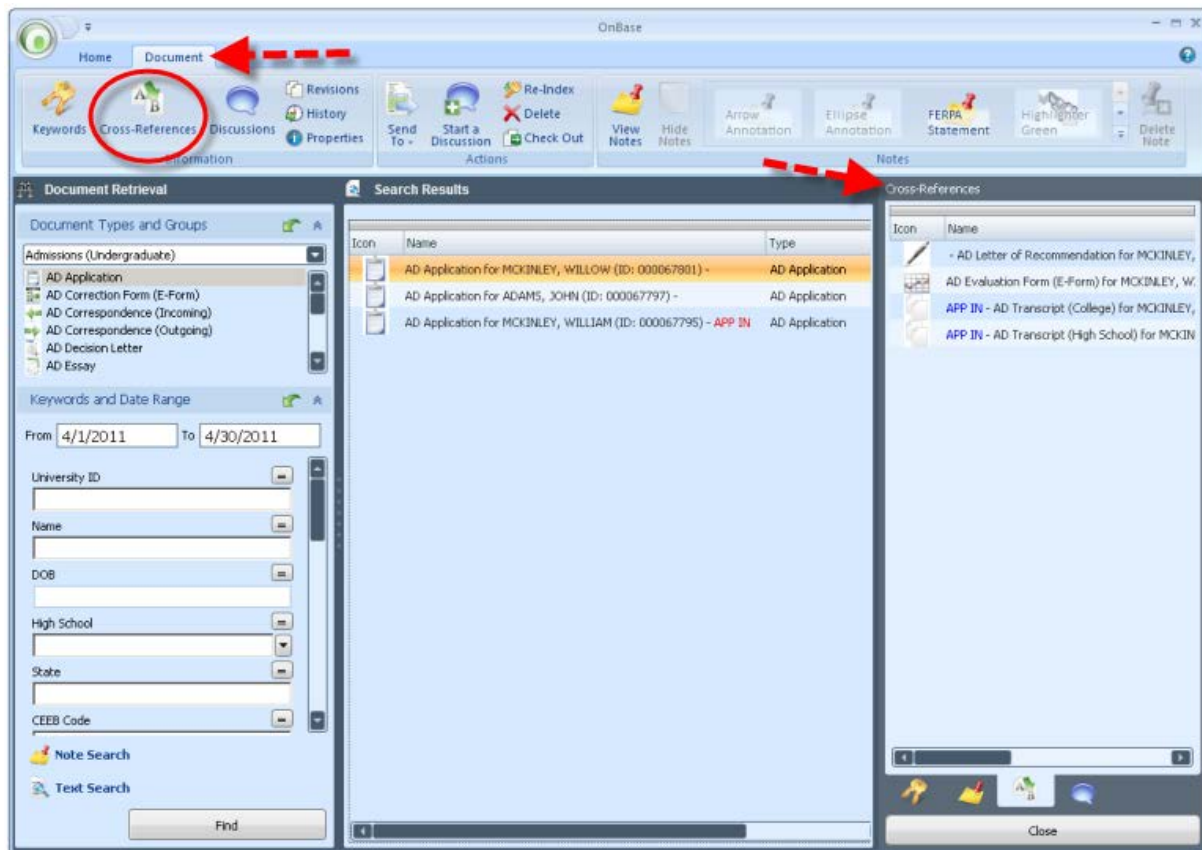
8. Document Retrieval by Cross Reference

A **Cross Reference** is a relationship between a Document Type and one or more other Document Type(s). This allows you to double-click on a document and retrieve the related document(s).

To open a document by cross-reference:

Retrieve a document

Highlight that document, and click on the Document tab. Click the Cross-References button. If a cross reference has been configured for the Document Type, this will automatically display a new Cross-References pane with all of the documents related to the original document. **NOTE:** All this happens without having to enter Keyword information.



Double-click a document in the Cross-References pane to open it. You can then position the windows side-by-side, or move the new window to a separate monitor if your workstation is configured with dual monitoring, to view multiple documents at the same time.

9. Document Retrieval Using Note Search

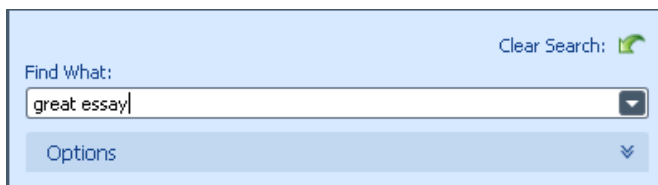
Note Search allows you to search documents for notes. You can limit your search by Document Type, Keyword Value, Note Type, note text, note creation date, and the note creator.

In the Document Retrieval pane, select the Document Type Group(s) and/or Document Type(s) to search.

Click the **Note Search** hyperlink.

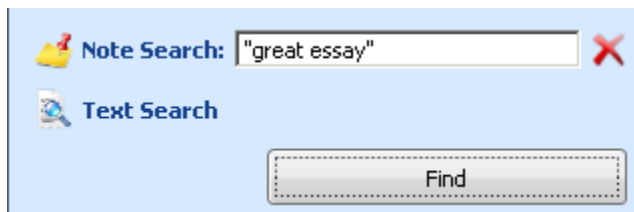


Type the note text to search for in the **Find What** field, or use the drop-down list to select from previous note searches. You can also expand the **Options** pane for additional search parameters based on Date Range, Note Owner, or Note Type.



Click outside the **Note Search** window.

The **Note Search** window closes and the **Note Search** field displays in the **Document Retrieval** pane:

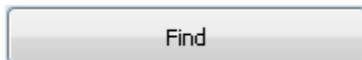


If you specified note text to search for in the **Note Search** window's **Find What** field, the **Note Search** field contains this text enclosed by quotation marks; additional search criteria are represented as **+Parameters**.

You can remove the note search by clicking the following button:

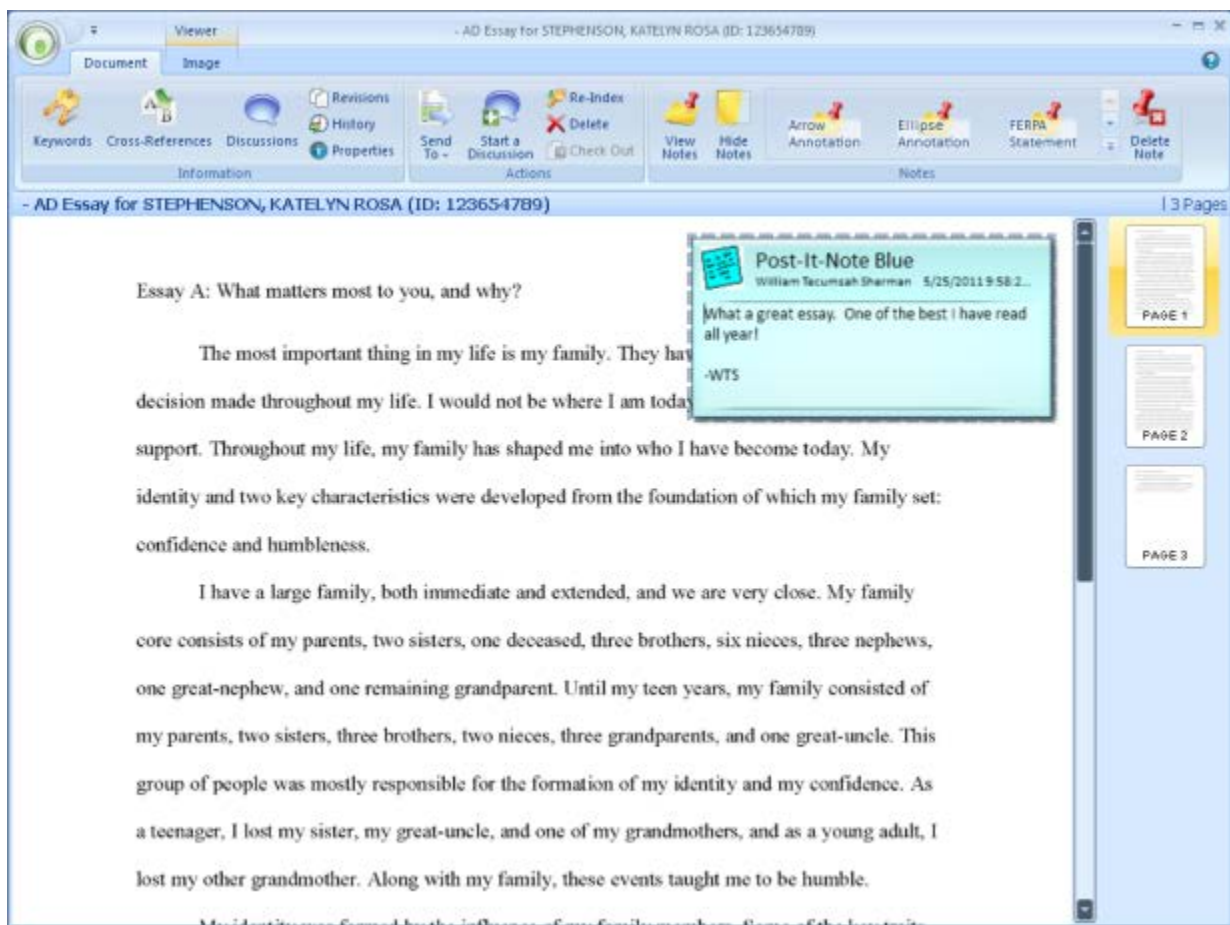


Click Find:



When the search is finished, OnBase displays all matching documents in a **Document Search Results** list.

Open a document by double-clicking its listing. The document is displayed in the **Document Viewer**:

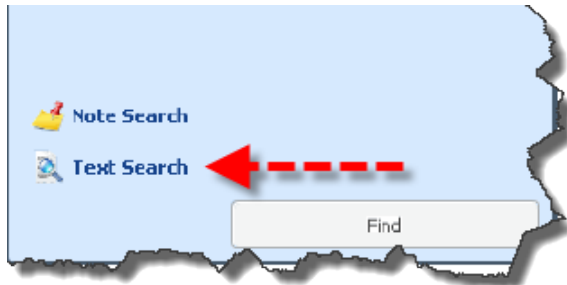


10. Document Retrieval Using External Text Search

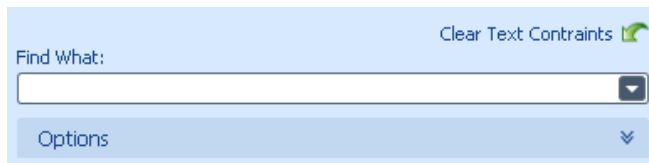
If you have sufficient privileges, you can search for specific text in a text-based document assigned to a Document Type or Document Type Group.

In the Document Retrieval pane, select the Document Type Group(s) and/or Document Type(s) to search.

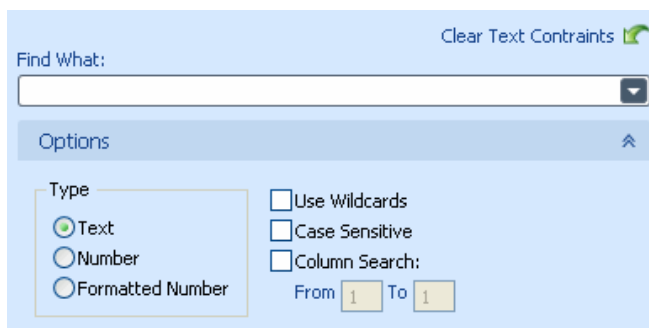
Click the [Text Search](#) hyperlink.



The Text Search window is displayed:



In the **Find What** field, [type the text string you want to search for](#). The string must contain at least two characters, and at least one character in the string must be a letter or a number. Use the drop-down list to select from previous text searches. To add additional search parameters, expand the **Options** pane:



Select a **Type** Radio Button:

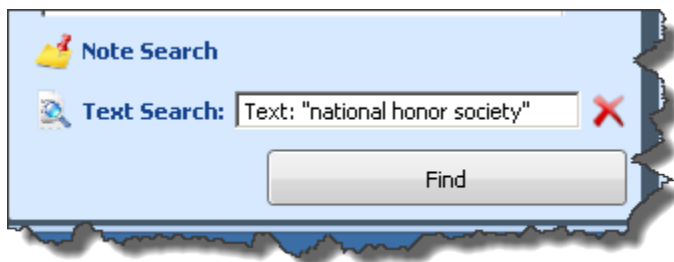
- **Text** - Searches for alphanumeric text.
- **Number** - Searches for numeric values and allows the use of the following operators to limit the search: =, >, <, =>, and <=. You can use **and**, **or**, and **to** as operators to search for a range of values. For example, type **2009 and 2010** to find documents containing both 2009 and 2010.
If you are searching for an exact number that is part of an alphanumeric text string, then the number will not be found. For example, if you search for **001** and the actual text is **ABC001**, then the value will not be found.
- **Formatted Number** - Searches for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type **> 800-00-0000** in the **Search String** field.

You can use this option with following operators to limit your search: =, >, <, =>, and <=. The **and**, **or**, and **to** operators can be used to search for a range of values. For example, type **800-00-000 to 900-00-0000** to find documents containing values within this range.

Select one of the following check boxes if necessary:

- Select **Use Wildcards** to include wild card characters in your text string search criteria.
- Select **Case Sensitive** to return only matches that have the same capitalization as the text string search criteria.
- Select **Column Search** to search for a text string within specified columns. In the **From** field, type the character position of the column to start the search in (the left most column to be searched). The column of characters at the far left of the document is **1**, the next column to the right is **2**, and so on. In the **To** field, type the character position of the column to end the search in (the right most column to be searched). The number in the **To** field must be greater than or equal to the number in the **From** field.

Click outside the Text Search window. The **Text Search** window closes and the **Text Search** field displays in the **Document Retrieval** pane:



You can clear the text search by clicking the following button:



Click Find:



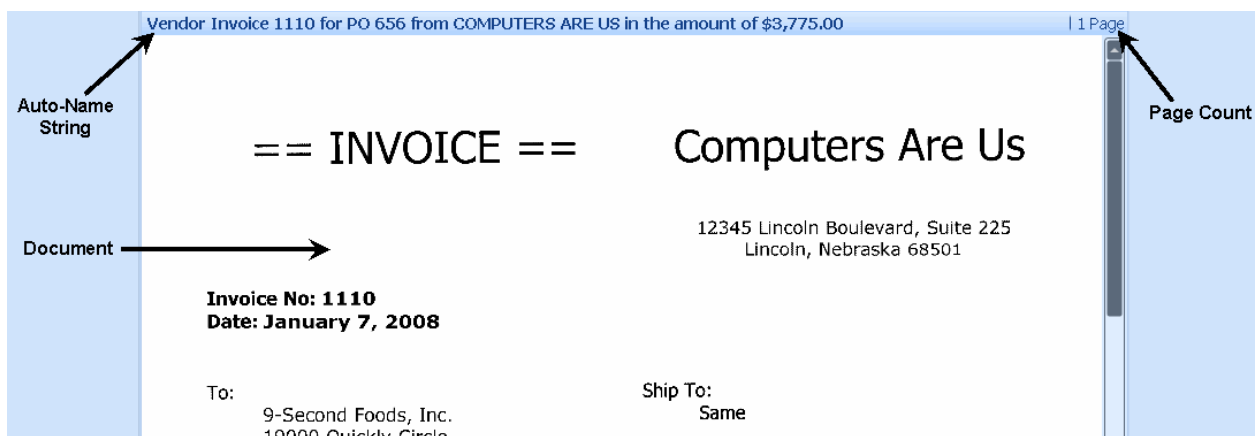
When the search is finished, OnBase displays all matching documents in a **Document Search Results** list.

Open a document by double-clicking its listing. The document is displayed in the **Document Viewer**.

11. Working with Documents

This chapter provides a general overview of working with documents. When working with documents in OnBase, it is important to understand that documents may behave slightly differently depending upon their file format. A file format identifies the type of file. The two most common file formats are image documents and text documents. Other file formats include XML, video formats, or OLE documents, such as those created with Microsoft Office applications. See your system administrator for specific questions regarding your system's file types and their default behavior.

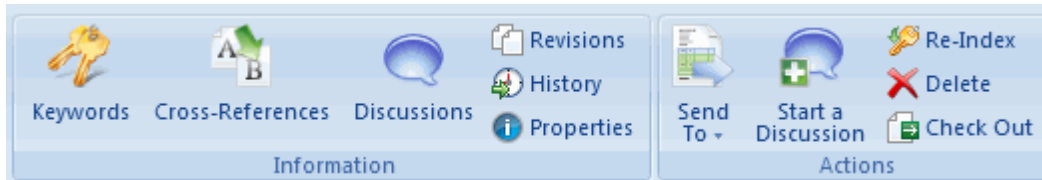
When you open a document, it is displayed in the Document Viewer. The document's Auto-Name string and page count are displayed above the document.


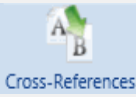










Depending on the Document Type and your rights, you might see different ribbon tabs, ribbon groups, icons and other graphics that indicate the presence of notes or annotations.

- The **Document** tab provides a variety of options for viewing or changing the document as well as navigation features.
- From an open document, right-click to receive a list of possible options.

Document Tab



 <p>Keywords</p>	<p>Keywords displays the Add/Modify Keywords pane in the task pane</p> <p>Tip: When the Add/Modify Keywords pane is displayed, you can easily view the document's notes and cross-references by selecting the corresponding tab.</p>
 <p>Cross-References</p>	<p>Cross-References displays the Cross-References pane in the task pane.</p> <p>Tip: When the Cross-References pane is displayed, you can easily view the document's keywords and notes by selecting the corresponding tab.</p>
 <p>Discussions</p>	<p>Discussions displays the Discussions pane in the task pane.</p> <p>Note: Collaboration licensing is required to use discussions. For information on using discussions, see the Collaboration documentation.</p>
 <p>Revisions</p>	<p>Revisions displays the Revisions and Renditions dialog box.</p> <p>Note: EDM Services licensing is required to use revisions. For information on using revisions, see the EDM Services documentation.</p>
 <p>History</p>	<p>History displays the Document History dialog box.</p>
 <p>Properties</p>	<p>Properties displays the Document Properties dialog box.</p>
 <p>Send To</p>	<p>Send To displays the following options:</p> <ul style="list-style-type: none"> • Briefcase sends the selected document to a Unity Briefcase folio. Unity Briefcase licensing is required to send documents to Unity Briefcase folios. See the Unity Briefcase documentation for more information on folios. • Mail Recipient sends the document or a link to the document to a user via external 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.
 <p>Start a Discussion</p>	<p>Start a Discussion displays the Discussions pane in the task pane.</p> <p>Note: Collaboration licensing is required to use discussions. For information on using discussions, see the Collaboration documentation.</p>
 <p>Re-Index</p>	<p>Re-Index displays the Re-Index pane in the task pane.</p>
 <p>Delete</p>	<p>Delete removes the document from OnBase.</p>



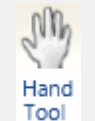




















	<p>Check Out persistently checks out the selected document(s).</p> <p>Note: EDM Services licensing is required to check out documents. For information on using persistent check out, see the EDM Services documentation.</p>
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Image Tab



The **Image** tab allows you to view documents more efficiently. You can use the buttons to resize and reorient the document.

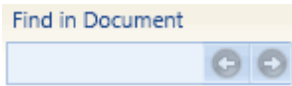
	<p>Selection Zoom allows you to zoom in on the selected region of the document. When this button is selected, click on the document and drag the mouse select a region. Release the mouse button to zoom in on the selected region.</p>
	<p>Hand Tool allows you to pan, or scroll, the document in any direction. When this button is selected, click on the document and drag the mouse to move the document.</p> <p>Note: To pan quickly, hold down the Alt key while moving the mouse.</p>
	<p>Previous Document displays the previous document in the Document Search Results list.</p>
	<p>Next Document displays the next document in the Document Search Results list.</p>
	<p>Previous Page displays the preceding page of a multi-page document.</p>
	<p>Next Page displays the following page of a multi-page document.</p>
	<p>First Page displays the first page of the document.</p>
	<p>Last Page displays the last page of the document.</p>
	<p>Go To Page allows you to go to a specific page in the document. After clicking this button, type a page number and click OK.</p>

	<p>Toggle Thumbnails displays or hides thumbnails.</p>
	<p>Zoom In magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.</p>
	<p>Zoom Out reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one third.</p>
	<p>Sizing options allow you to select a standard sizing option. Select a specific percentage of reduction or magnification (25%, 50%, 75%, 100%, or 200%), Fit To Width, or Fit To Window. You can also type a custom scale. Also displays the current magnification percentage whenever the Zoom In or the Zoom Out options are used. Note: Fit To Width is selected by default.</p>
	<p>Actual Size displays the document in its actual size (as it is stored in OnBase).</p>
	<p>Fit To Width resizes the document page so that its width is the same as the width of the document display area.</p>
	<p>Fit To Window resizes the document page so that the entire image is displayed in the window.</p>
	<p>Toggle Overlay turns the overlay on and off, if an overlay is present.</p>
	<p>Rotate Left rotates the document 90 degrees counterclockwise.</p>
	<p>Rotate Right rotates the document 90 degrees clockwise.</p>
	<p>Flip Horizontally flips the document along the horizontal axis.</p>
	<p>Flip Vertically flips the document along the vertical axis.</p>
	<p>Save Flip & Rotation saves any flips or rotations.</p>

Text Tab

The Text tab allows you to view text documents more efficiently. You can use the buttons to resize and reorient the document. You can also search for text. The text tab contains similar icons and functionality as the Image tab, save for the **Find in Document** Search box.

Internal Text Search



Use the **Find in Document** field on the **Text** tab to search for specific text strings within the document.

To perform an internal text search:

1. Click in the **Find in Document** field and type the characters to search for. Internal text searches are case-insensitive, so searches for **Account** will also find **account**, and searches for **account** will also find **Account**.
2. Press the **Enter** key.
3. The number of occurrences of the specified string of text is displayed below the **Find in Document** field as **Result 1 of #**, where **#** is the total number of occurrences.
4. The first occurrence of the specified string of text is displayed within a highlight bar.
5. Click **Find Next** to search for the next following occurrence of the specified string within the current text document.

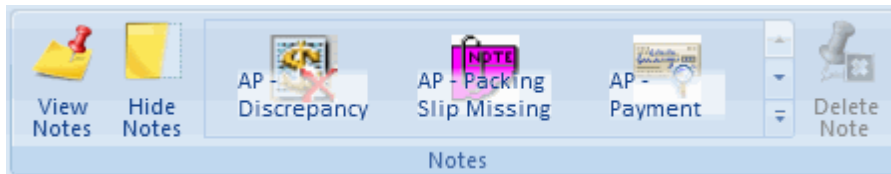


6. Click **Find Previous** to search for the previous occurrence of the specified string within the current text document.



12. Notes

If you have sufficient privileges, you can view notes and create notes and annotations on documents using the Notes gallery.



When you click **View Notes**, the **Notes** pane displays in the task pane.

Tip: When the Notes pane is displayed, you can easily view the document's keywords and cross-references by selecting the corresponding tab.

Scroll through the available notes and annotations using the following buttons:



To display all available notes and annotations, click the following button:



Notes are available from the **Notes** gallery when a document is opened in the OnBase viewer or selected in the Document Search Results list. Notes are limited to 250 characters.

1. On the **Document** tab, in **Notes**, select the type of note.
2. If you are adding a note to an open text or image document, click on the document to place the note. To type text for the note, double-click the note. You can also click **View Notes**, and type text in the **Notes** pane.

If you are adding a note to a document in the Document Search Results list, or an open OLE document or E-Form, the **Notes** pane is displayed. If necessary, type text for the note. Click **Close**.

3. To delete a note, perform one of the following:
 - Select the note and click **Delete Note** in the **Notes** gallery.
 - Right-click the note and select **Delete**.

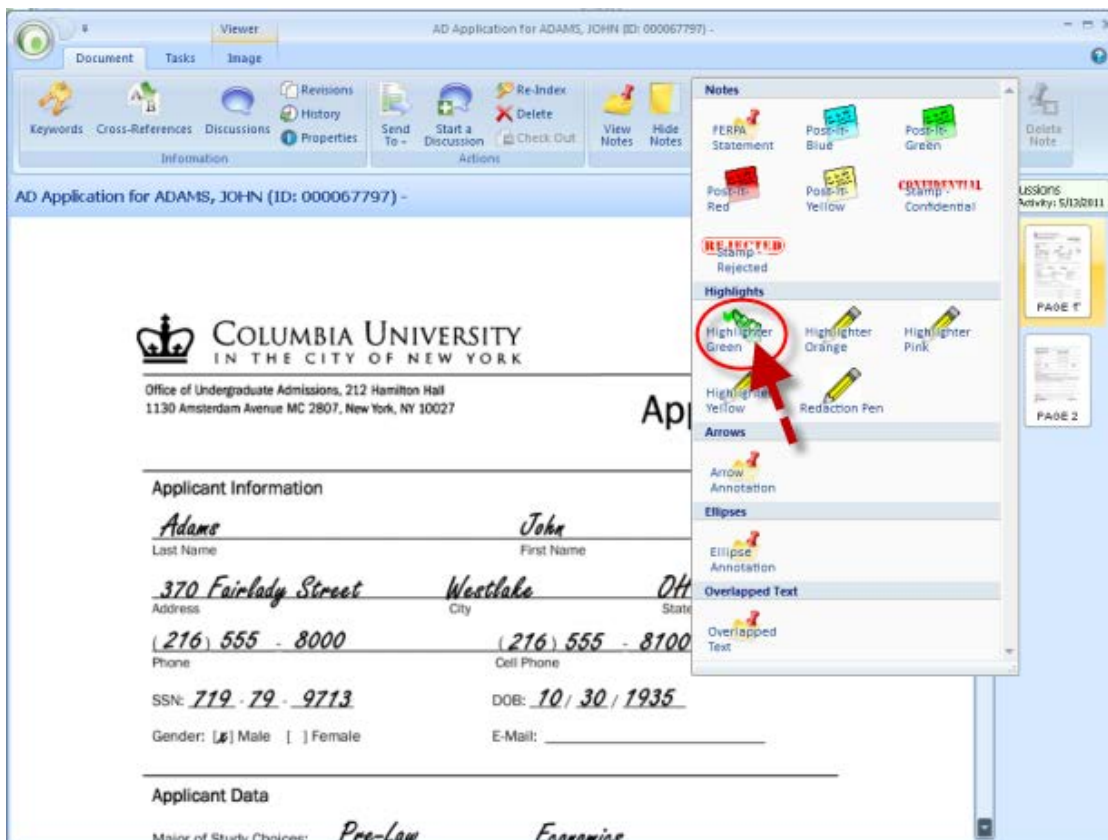
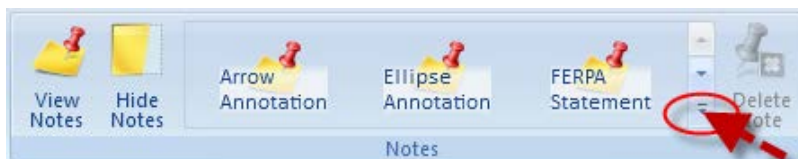
13. Annotations

Annotations are available from the Notes gallery when a document is opened in the OnBase Viewer. Annotations are not available from the Notes gallery when a document is selected in the Document Search Results list. This is because annotations have to be drawn on documents.

Highlights

To use a **Highlight Annotation**:

Select a **highlight annotation** from the **Note Selection**



Left-click and drag your mouse over the portion of the document that you would like to highlight

Release your left-click and the highlight will appear on the document

AD Application for ADAMS, JOHN (ID: 000067797) -

Document Tasks Image

Keywords Cross-References Discussions History Properties Information

Revisions History Properties

Send To Start a Discussion Check Out Actions

Re-index Delete View Notes Hide Notes Notes

Arrow Annotation Ellipse Annotation FERRA Statement Delete Note

AD Application for ADAMS, JOHN (ID: 000067797) - | 2 Pages 1 Discussions Last Activity: 5/13/2011

COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK

Office of Undergraduate Admissions, 212 Hamilton Hall
1130 Amsterdam Avenue MC 2807, New York, NY 10027

Application

For Admission

Applicant Information

Last Name: Adams First Name: John Middle Initial: DH

Address: 370 Fairlady Street City: Westlake State: OH Zip Code: 44145

Phone: (216) 555 - 8000 Cell Phone: (216) 555 - 8100

SSN: 719 - 79 - 9713 DOB: 10 / 30 / 1935

Gender: Male | Female E-Mail: _____

Applicant Data

Major of Study Choices: Pre-Law Economics

Career Plans:

<input type="checkbox"/> Academia	<input type="checkbox"/> Engineering	<input type="checkbox"/> Scientific Research
<input type="checkbox"/> Architecture	<input type="checkbox"/> Government & Politics	<input type="checkbox"/> Social/Public Service
<input checked="" type="checkbox"/> Business	<input type="checkbox"/> Information Technology	<input type="checkbox"/> Teaching

Arrows

To use the **Arrow Annotation**:

Select Arrow as an **Annotation Type**

Left-click and drag your mouse where you would like the arrow to display. (Where you release the left-click is where the head of the arrow will be displayed)

(216) 555 - 8000
Phone

SSN: 719 - 79 - 9713

Gender: Male Female

Applicant Data

Major of Study Choices: **Pre-L**

Career Plans:

A blue arrow points to the Gender field. A green box highlights the text 'Pre-L' in the Major of Study Choices field.

Overlap Text

To use **Overlapped Text**:

Select Overlapped Text Annotation Type

Left-click and drag your mouse where you would like the Overlapped Text to be displayed on the document.

Type the text you would like to display on the document.

NYC IN THE CITY OF NEW YORK

Office of Undergraduate Admissions, 212 Hamilton Hall
1130 Amsterdam Avenue MC 2807, New York, NY 10027

What a great Application!

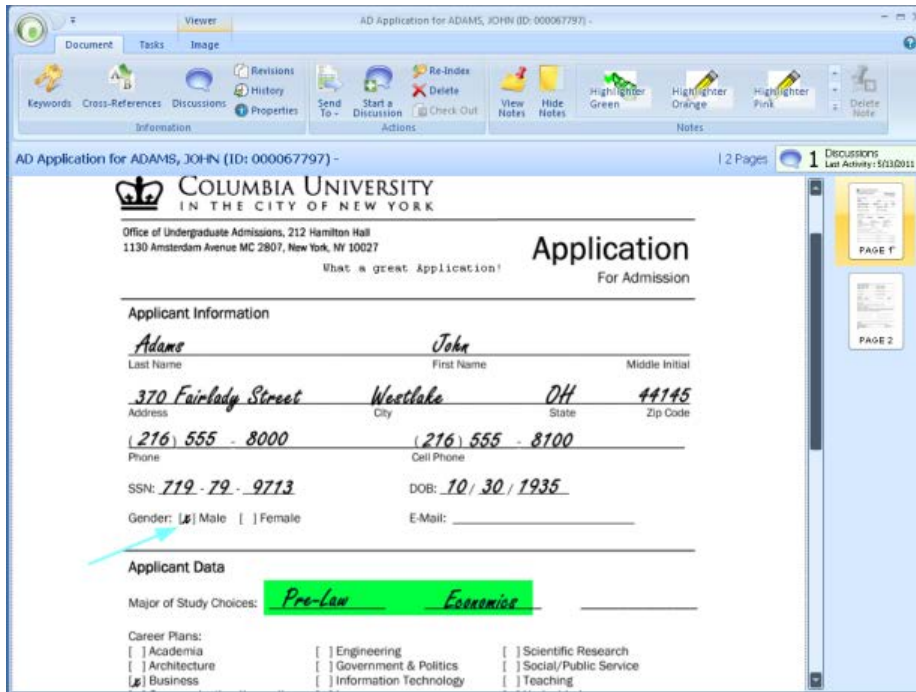
Applicant Information

Adams *John*
Last Name First Name

370 Fairview Street Westlake

A dashed blue box highlights the text 'What a great Application!' in the middle of the form.

When you click away from the text box, the Overlapped Text will be displayed on the document.

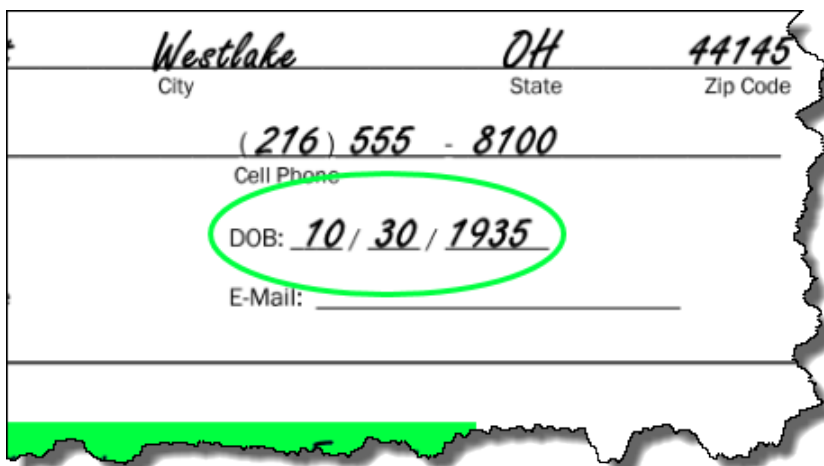


Ellipses

To use the **Ellipse Annotation**:

Select **Ellipse Annotation** from the Note selection

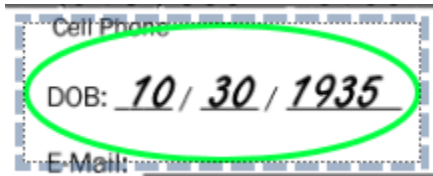
Left-click and drag your mouse over the portion of the document that you would like the ellipse displayed. (When you release the left-click the ellipse will display on the document)



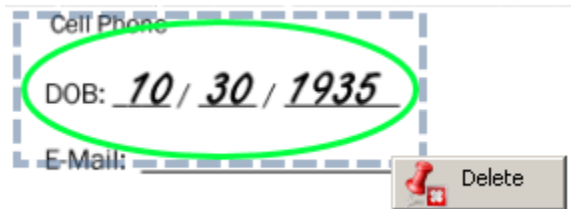
Deleting Annotations

To delete an annotation:

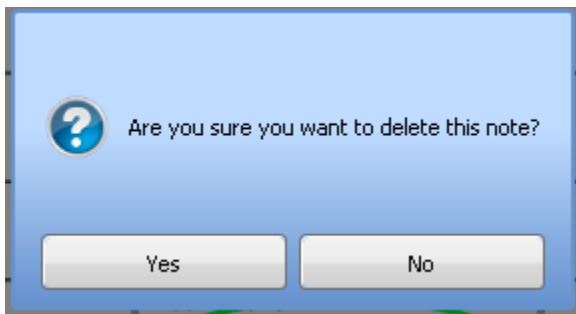
Left-click on the Annotation. It will be selected in gray.



Right-click on the Annotation. A Delete option will appear.



Select Delete. Click **Yes** when it asks Are you sure you want to delete this note?



*** END OF DOCUMENT ***