

User Guide

OnBase 13

Unity Client Retrieval, Upload and Batch Processing

IT Training

(818) 677-1700

training@csun.edu

www.csun.edu/it/training

*The information in this guide was provided by Hyland Software, Inc. This document has been adapted for accessibility.



Table of Contents

Log In.....	1
Unity Homepage	2
Document Retrieval By Custom Query.....	3
Performing a Custom Query	3
Document Retrieval By Keyword.....	8
Keyword Operators and Wildcards.....	9
Keyword Operators	10
Document Retrieval By Date Range.....	11
Document Retrieval By Cross-Reference	12
Opening a Document by Cross-Reference	12
Document Retrieval Using Note Search	13
Retrieving a Document Using Note Search	13
Document Retrieval Using External Text Search.....	15
Using External Text Search.....	15
Working with Documents.....	17
Document Tab.....	18
Image Tab	19
Text Tab.....	21
Internal Text Search	21
Notes.....	21
Annotations	23
Highlights	23
Arrows.....	24
Ellipses.....	26
Deleting Annotations	26
Upload	27
Import an Electronic Document	27
Scan a Document.....	29
Batch Scanning	31
Batch Indexing	33

Indexing	33
Split Documents	34
Configure Keyword Panel.....	35
Need Help?	36

LOG IN

To log in to OnBase:

1. Select the **Unity Client** shortcut.

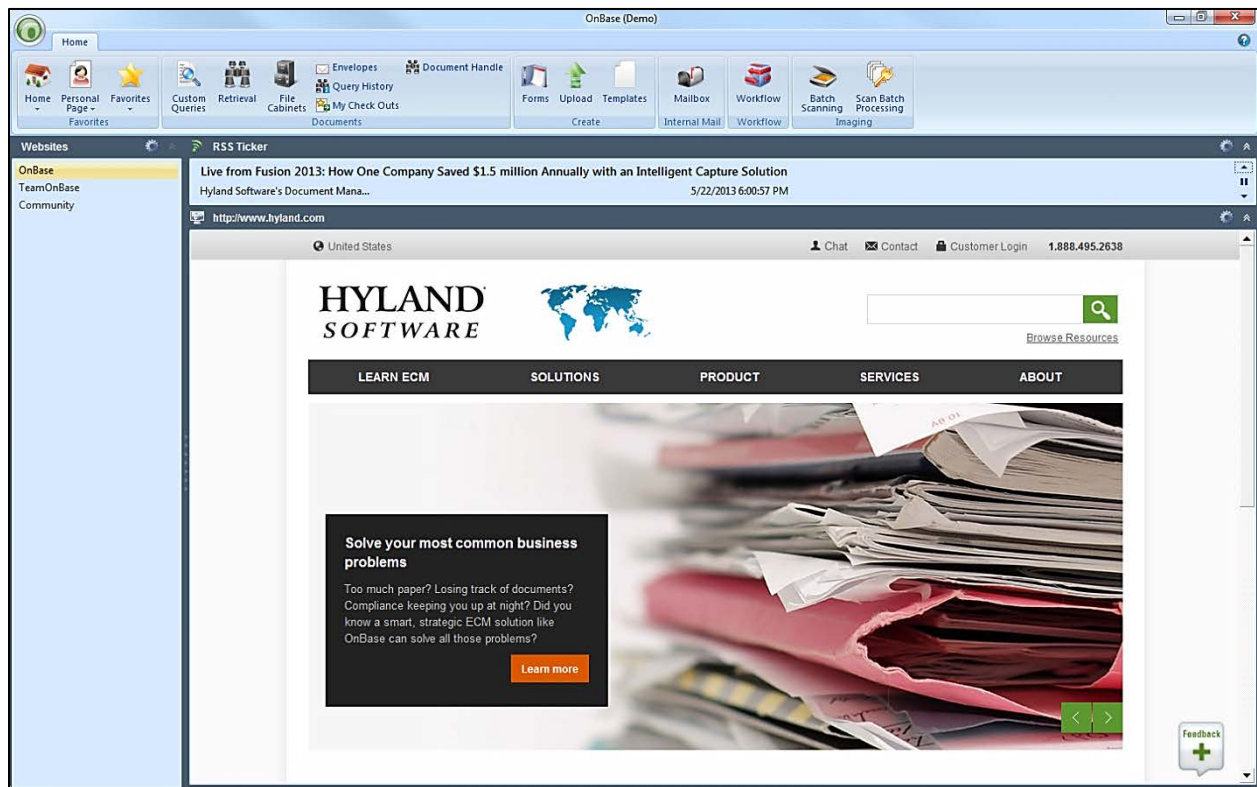


2. Depending on your configuration, you may need to enter a username and password and then select the **Login** button.

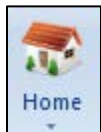


UNITY HOMEPAGE

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 the Home page from anywhere within OnBase, select the **Home** button at the top, left of the screen.



To select a new home page layout, select the **Down** arrow beneath the **Home** button, and select **Make this layout my home page**. You can always reset the Home page by selecting **Reset home page**.

DOCUMENT RETRIEVAL BY CUSTOM QUERY

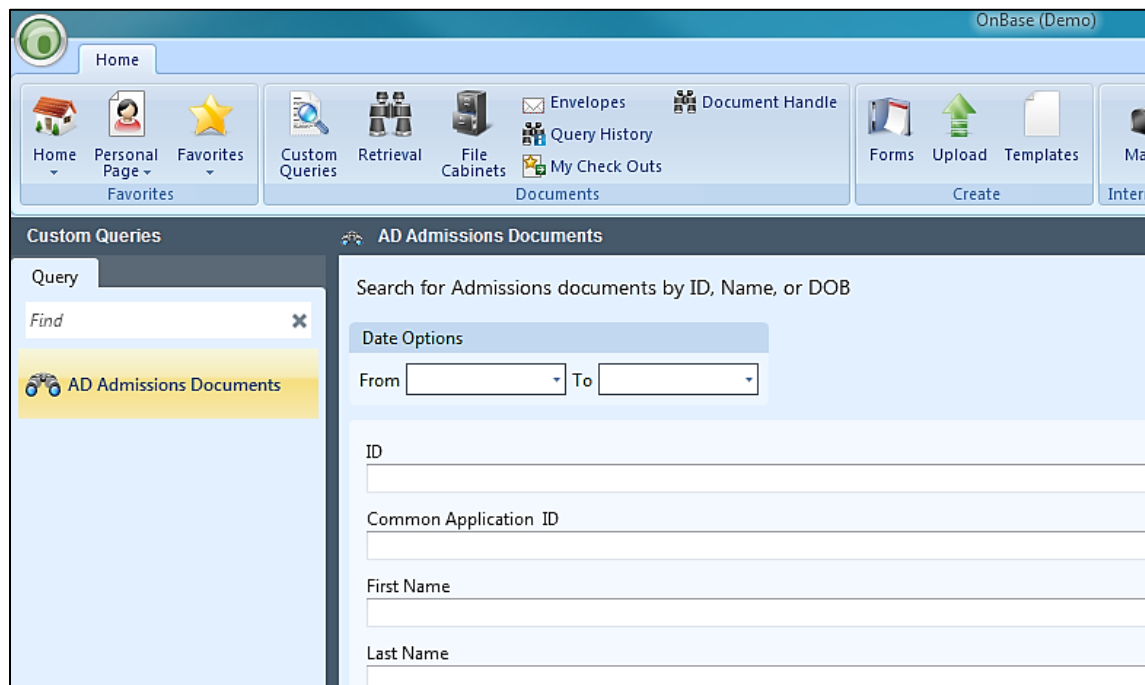
A **Custom Query** can be developed to allow users to more easily retrieve documents that exist within OnBase. This allows the user to find the specified documents using a pre-defined form and limits the criteria needed to perform the search.

Performing a Custom Query

1. Select **Custom Queries** in the ribbon.

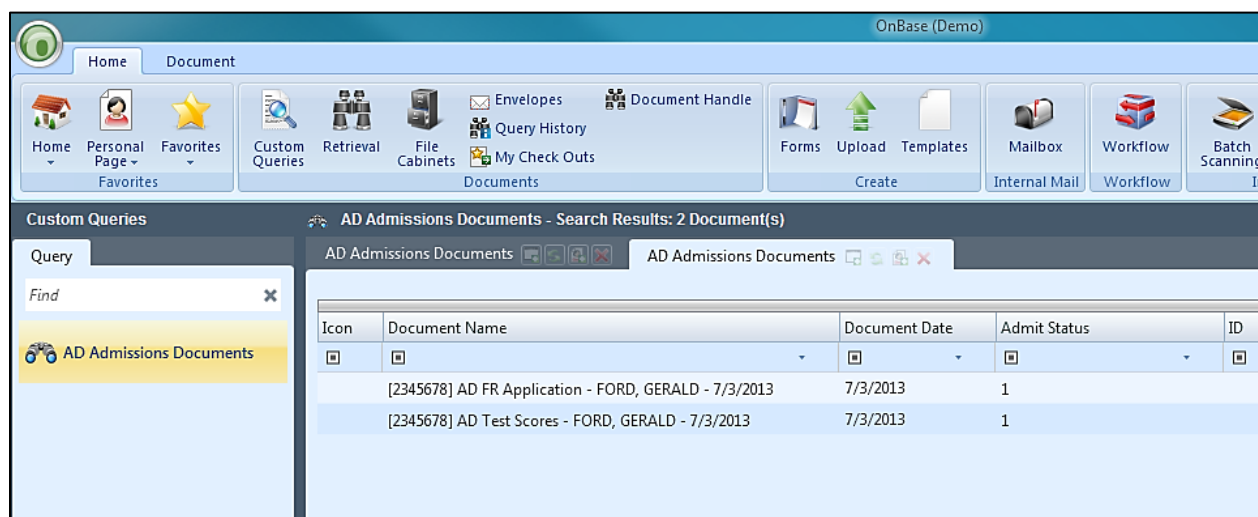


2. Select a custom query from the pane on the left. Once selected, the query will open to the right.





3. Enter the appropriate search criteria, and then press the **Enter** key, or select the **Search** button configured on the custom query. Your search results will be displayed on a tab.
4. Double-click on a document to view it.

When you conduct multiple custom queries, results are retained on their respective tabs for future use.



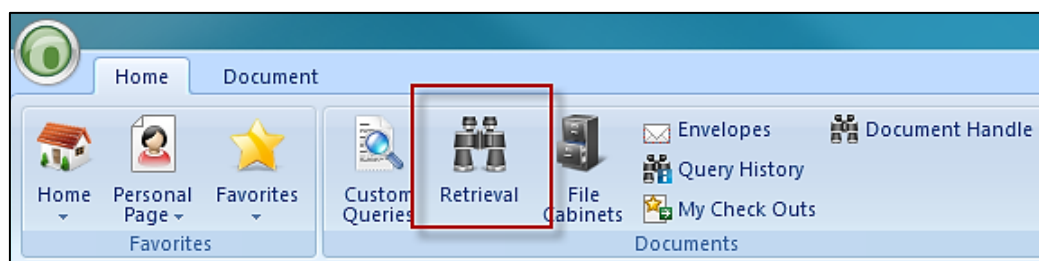
Note: results are retained for the duration of your OnBase session.

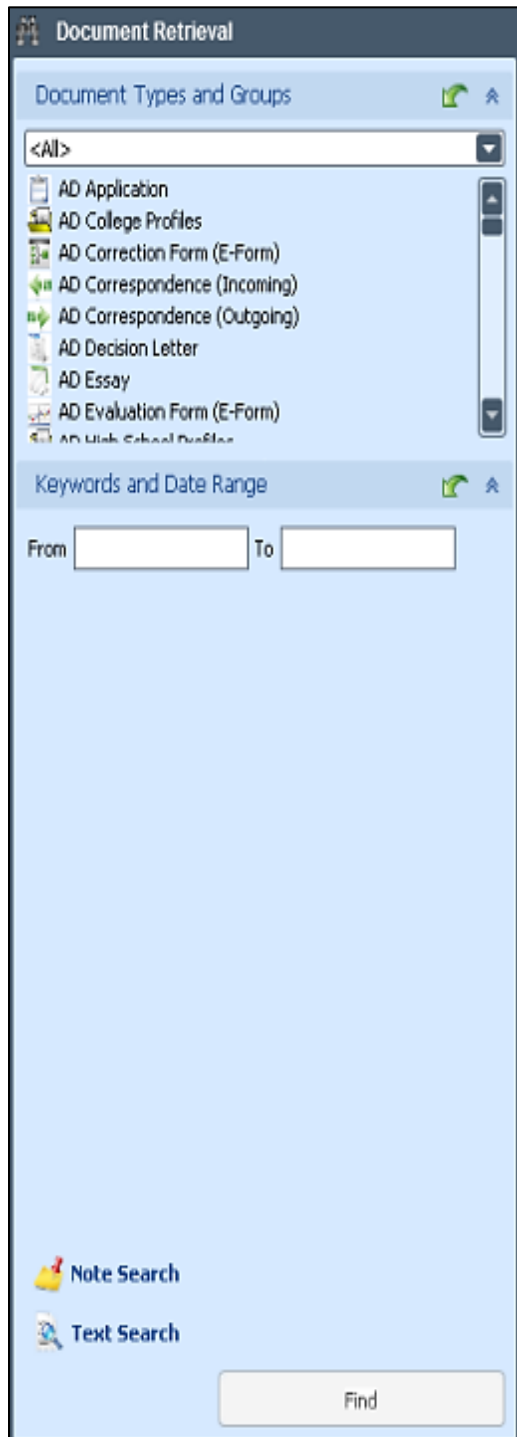
A tab contains the following buttons:

Buttom Image	Description
	Select to open the Custom Query results in a new window.
	Select to close the Custom Query results. These results will no longer be available.

To access Document Retrieval, select the Retrieval icon:

1. Select 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
 - Retrieval by Document Date
 - Retrieval Using Note Search
 - Retrieval Using External Text Search
3. Select **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.

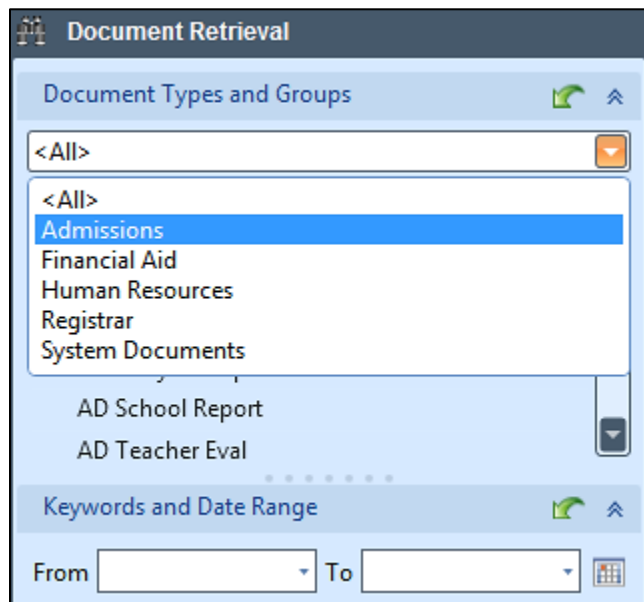
Note Search – Search documents for notes. You can limit your search by Document Type, Keyword Value, Note Type, note text, note creation date, and the note creator.

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

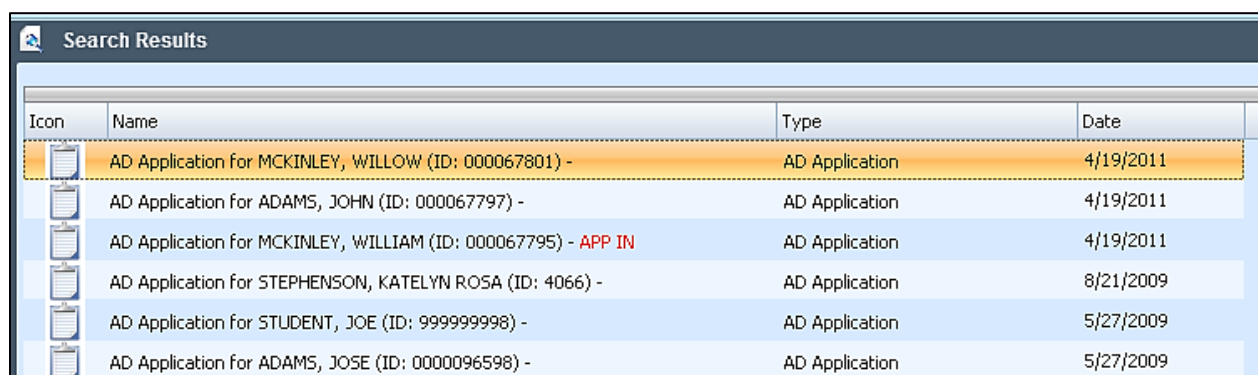
To retrieve **all** documents in the system under a particular Document Type:







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.

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

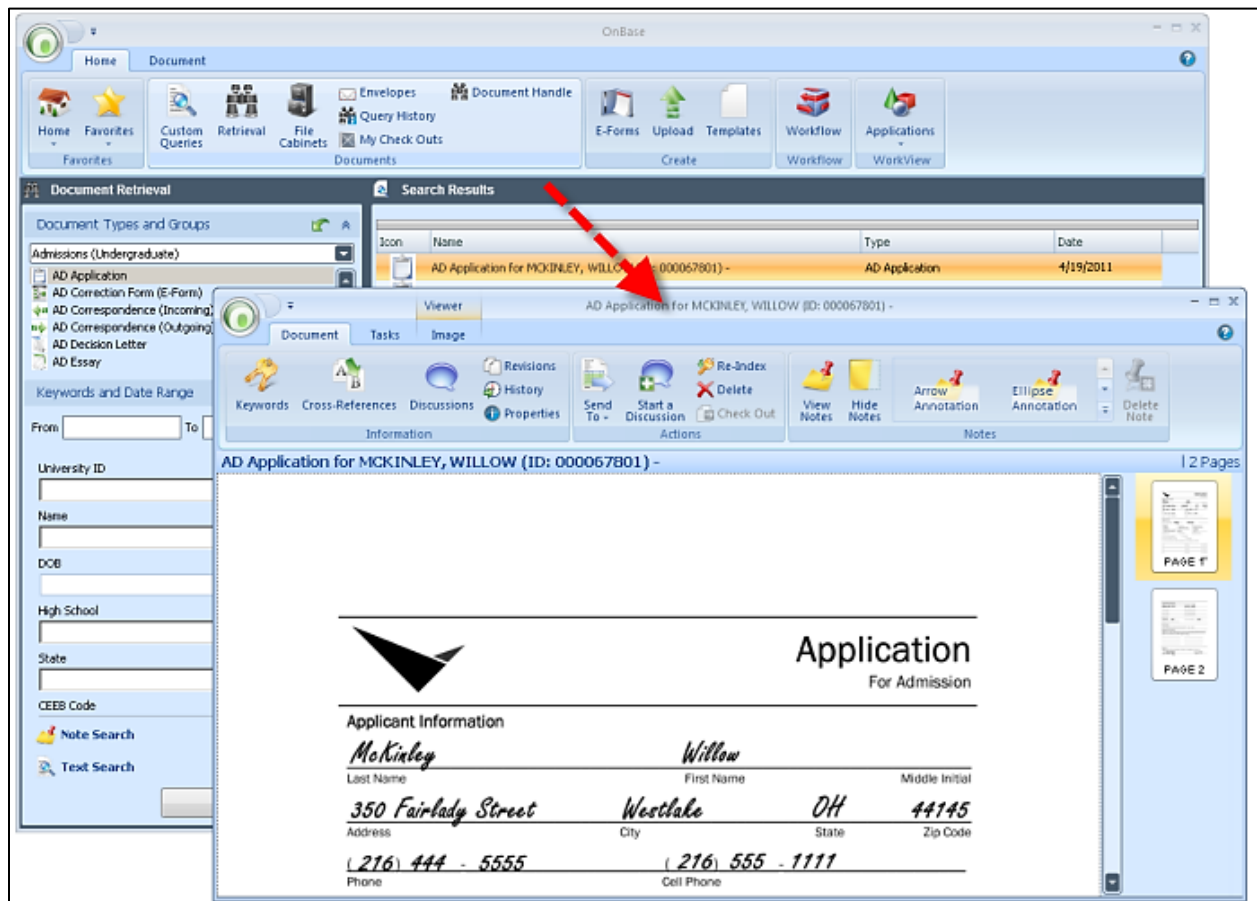


5. Select the **Document Type(s)** to retrieve.
6. Select **Find** to execute the search. The Document Search Results will display to the right.



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

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



DOCUMENT RETRIEVAL BY KEYWORD

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:

Document Retrieval

Document Types and Groups

Admissions (Undergraduate)

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

Keywords and Date Range

From To

University ID

Name

DOB

High School

State

Note Search

Text Search

Find

1. Select a **Document Type Group**.
2. Select the **Document Type(s)** to retrieve

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

3. Enter a keyword value into one or more fields. The more information entered the more specific the search will be.
4. Select **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.
5. Double-click on a document to view it.










NOTE: Select 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, select the last name keyword label and be sure to select the AND operator to change it to OR.

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.)

Keyword Operators

Button Image	Description
	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	To allows you to search from one keyword to another keyword of the same keyword. Used with Numeric or Date keywords.

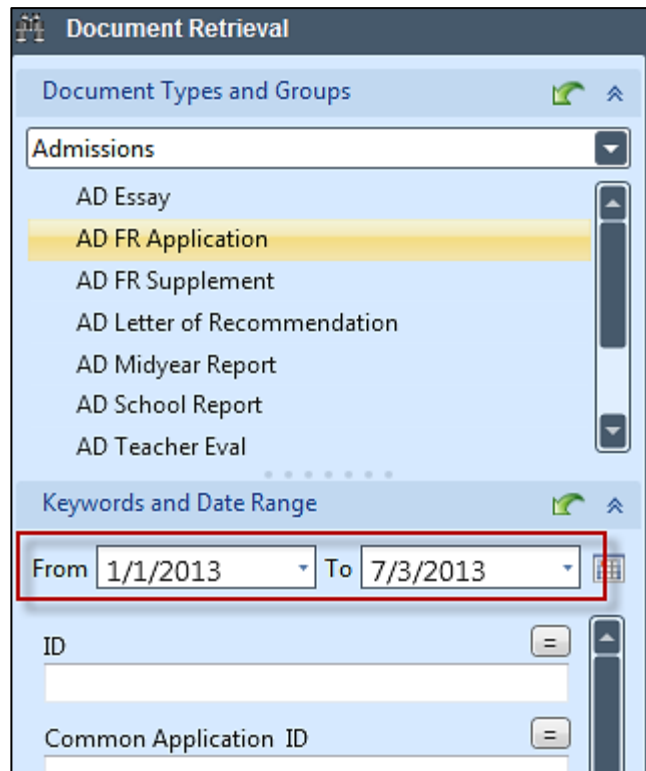
Wildcards:

Combined with keyword values, wildcards 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.)

DOCUMENT RETRIEVAL BY DATE RANGE

1. Select a **Document Type Group**. You will see a list of Document Types for the selected Document Type Group.
2. Select the **Document Type(s)** to retrieve.
3. Enter a date range in the **From** and **To** fields.



Document Retrieval

Document Types and Groups

Admissions

- AD Essay
- AD FR Application
- AD FR Supplement
- AD Letter of Recommendation
- AD Midyear Report
- AD School Report
- AD Teacher Eval

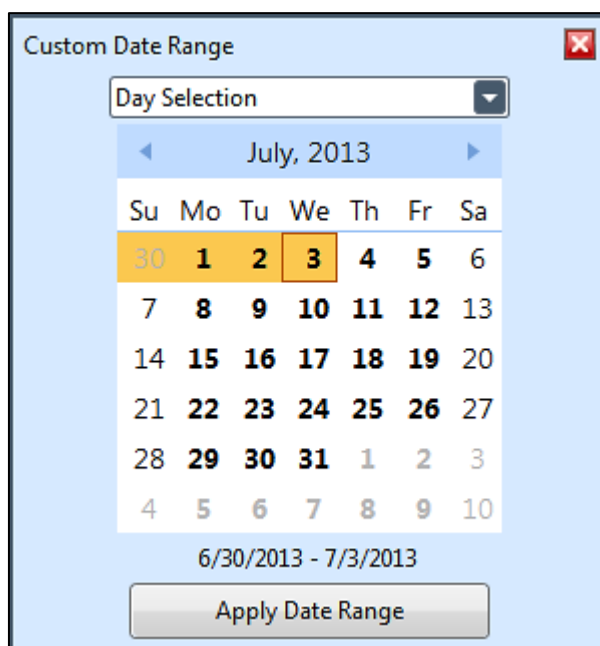
Keywords and Date Range

From 1/1/2013 To 7/3/2013

ID

Common Application ID

NOTE: Select the calendar to the right of the From and To fields to select a Custom Date Range.



Custom Date Range

Day Selection

July, 2013

Su	Mo	Tu	We	Th	Fr	Sa
30	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	31	1	2	3
4	5	6	7	8	9	10

6/30/2013 - 7/3/2013

Apply Date Range

4. Select **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.

5. Double-click on a document to view it.

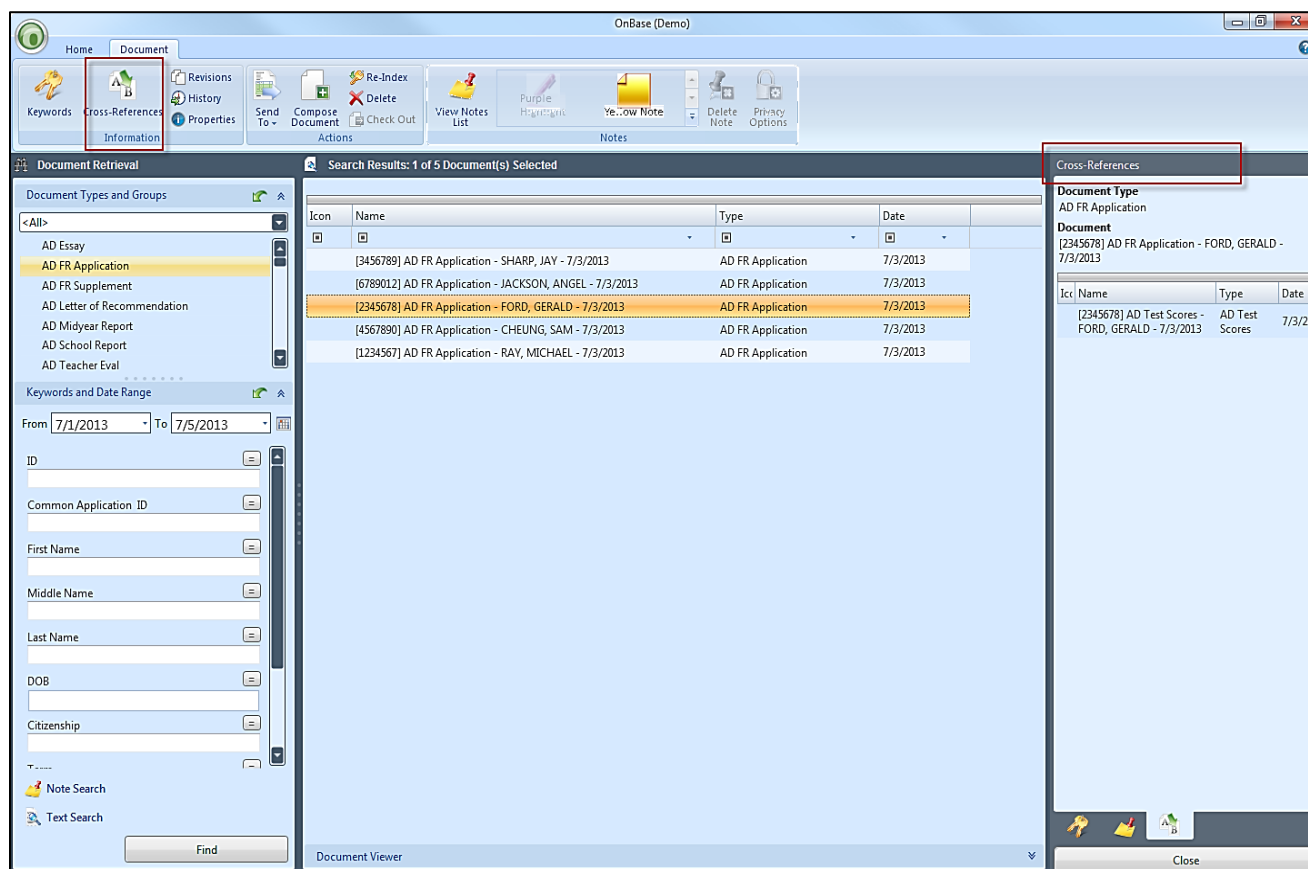
DOCUMENT RETRIEVAL BY CROSS-REFERENCE

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).

Opening a Document by Cross-Reference

1. Retrieve a document.
2. Highlight that document, and select the Document tab. Select 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: This happens without having to enter Keyword information.



3. 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.

DOCUMENT RETRIEVL USING NOTE SEARCH

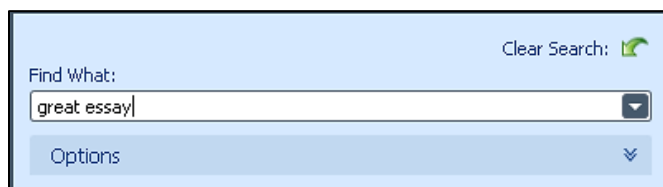
Note Search allows you to search documents for notes. You can limit your search by Document Type, Keyword Value, Note Type, note text, note creation date, and the note creator.

Retrieving a Document Using Note Search

1. In the **Document Retrieval** pane, select the **Document Type Group(s)** and/or **Document Type(s)** to search.
2. Select the **Note Search** hyperlink.

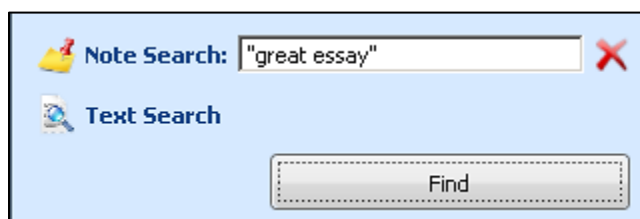


3. Enter the note text to search for in the **Find What** field, or use the dropdown list to select from previous note searches. You can also expand the **Options** pane for additional search parameters based on Date Range, Note Owner, or Note Type.



4. Select and 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.

5. You can remove the note search by selecting the **Close** button:

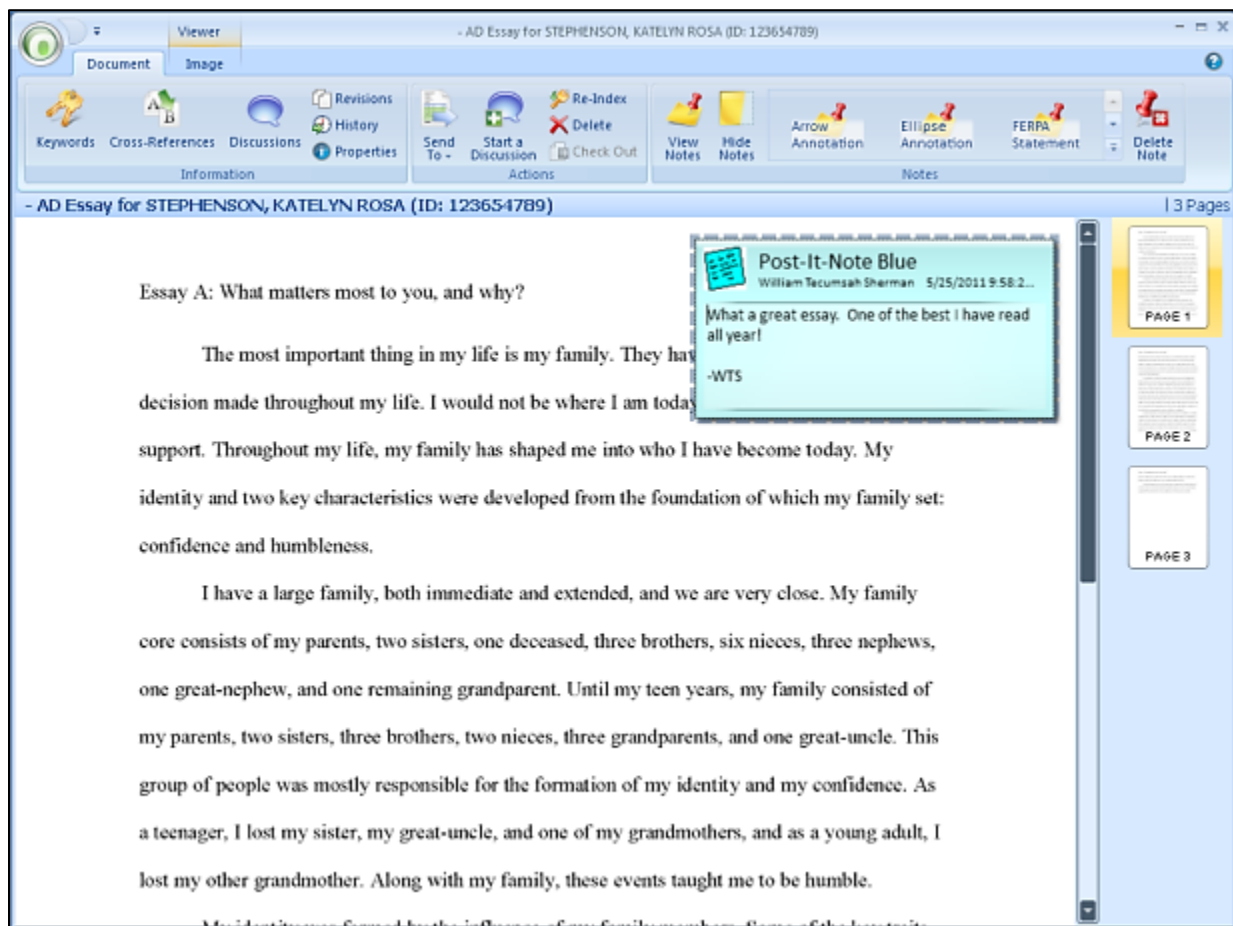


6. Select the **Find** button.



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

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



DOCUMENT RETRIEVAL USING EXTERNAL TEXT SEARCH

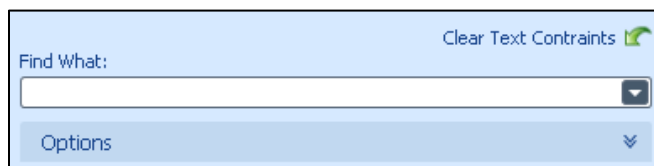
If you have sufficient privileges, you can search for specific text in a text-based document assigned to a Document Type or Document Type Group.

Using External Text Search

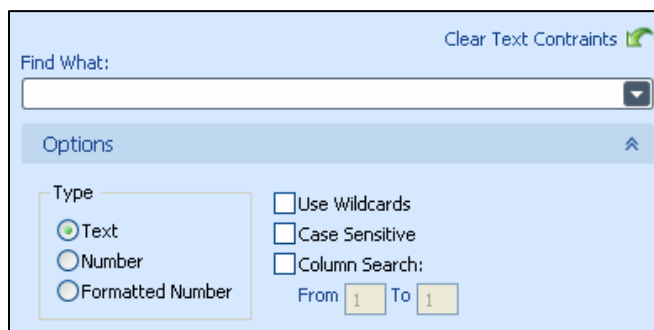
1. In the **Document Retrieval** pane, select the **Document Type Group(s)** and/or **Document Type(s)** to search.
2. Select the **Text Search** hyperlink.



The **Text Search** window is displayed:

A screenshot of a search window with a light blue header. The header contains the text 'Find What:' and a 'Clear Text Constraints' link with a green arrow icon. Below the header is a white text input field with a dropdown arrow on the right. At the bottom of the window is a blue button labeled 'Options' with a small blue arrow icon.

3. In the **Find What** field, enter 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 dropdown list to select from previous text searches. To add additional search parameters, expand the **Options** pane:

A screenshot of the same search window as before, but with the 'Options' pane expanded. The 'Options' pane has a light blue background and contains a 'Type' section with three radio buttons: 'Text' (selected), 'Number', and 'Formatted Number'. To the right of these are three checkboxes: 'Use Wildcards', 'Case Sensitive', and 'Column Search:'. Below the 'Column Search' checkbox are two small input boxes labeled 'From' and 'To', both containing the number '1'.

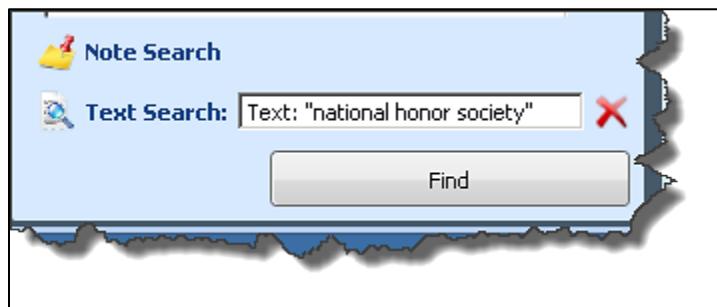
4. Select a **Type** radio button:

- **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.

5. 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.

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



7. You can clear the text search by clicking the **Close** button:



8. Select the **Find** button.



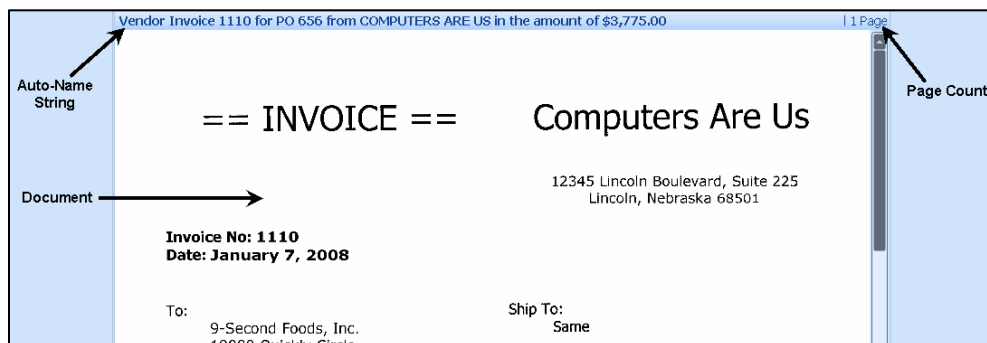
When the search is finished, OnBase displays all matching documents in a Document Search Results list.

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

WORKING WITH DOCUMENTS

This section 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.

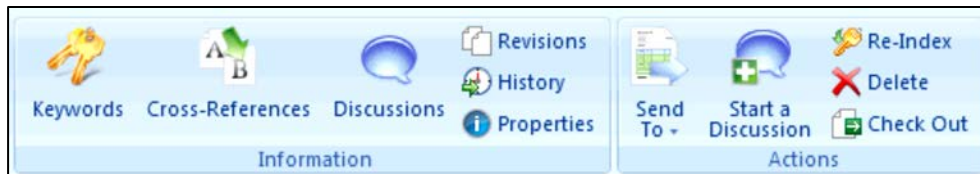



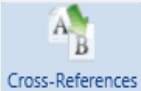

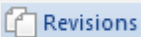



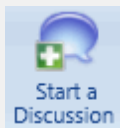
Depending on the Document Type and your rights, you might see different ribbon tabs, ribbon groups, icons and other graphics that indicate the presence of notes or annotations.

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




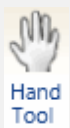




Button Image	Description
	<p>Keywords displays the Add/Modify Keywords pane in the task pane</p> <p>Tip: When the Add/Modify Keywords pane is displayed, you can easily view the document's notes and cross-references by selecting the corresponding tab.</p>
	<p>Cross-References displays the Cross-References 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 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 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 displays the Document History dialog box.</p>
	<p>Properties displays the Document Properties dialog box.</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 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>







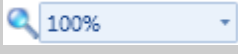









	Re-Index displays the Re-Index pane in the task pane.
	Delete removes the document from OnBase.
	Check Out persistently checks out the selected document(s).
	Note: EDM Services licensing is required to check out documents. For information on using persistent check out, see the EDM Services documentation.

Image Tab

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



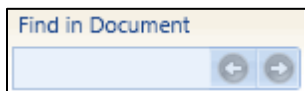
Button Image	Description
	Selection Zoom allows you to zoom in on the selected region of the document. When this button is selected, click on the document and drag the mouse select a region. Release the mouse button to zoom in on the selected region.
	Hand Tool allows you to pan, or scroll, the document in any direction. When this button is selected, click on the document and drag the mouse to move the document. Note: To pan quickly, hold down the Alt key while moving the mouse.
	Previous Document displays the previous document in the Document Search Results list.
	Next Document displays the next document in the Document Search Results list.
	Previous Page displays the preceding page of a multi-page document.
	Next Page displays the following page of a multi-page document.

 First Page	First Page displays the first page of the document.
 Last Page	Last Page displays the last page of the document.
 Go To Page	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 .
 Toggle Thumbnails	Toggle Thumbnails displays or hides thumbnails.
 Zoom In	Zoom In magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.
 Zoom Out	Zoom Out reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one third.
	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.
 Actual Size	Actual Size displays the document in its actual size (as it is stored in OnBase).
 Fit To Width	Fit To Width resizes the document page so that its width is the same as the width of the document display area.
 Fit To Window	Fit To Window resizes the document page so that the entire image is displayed in the window.
 Toggle Overlay	Toggle Overlay turns the overlay on and off, if an overlay is present.
 Rotate Left	Rotate Left rotates the document 90 degrees counterclockwise.
 Rotate Right	Rotate Right rotates the document 90 degrees clockwise.
 Flip Horizontally	Flip Horizontally flips the document along the horizontal axis.
 Flip Vertically	Flip Vertically flips the document along the vertical axis.
 Save Flip & Rotation	Save Flip & Rotation saves any flips or rotations.

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.

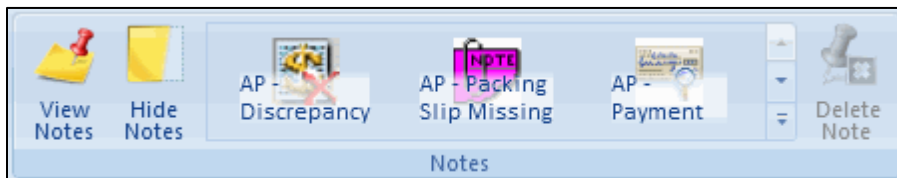


6. Click **Find Previous** to search for the previous occurrence of the specified string within the current text document.



Notes

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



When you select **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.

Adding Notes:

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, select the document to place the note. To enter text for the note, double-click the note. You can also select **View Notes**, and enter text in the **Notes** pane.
3. 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, enter text for the note.
4. Select **Close**.

Deleting Notes:

1. Select the note and select **Delete Note** in the **Notes** gallery.
2. Right-click the note and select **Delete**.

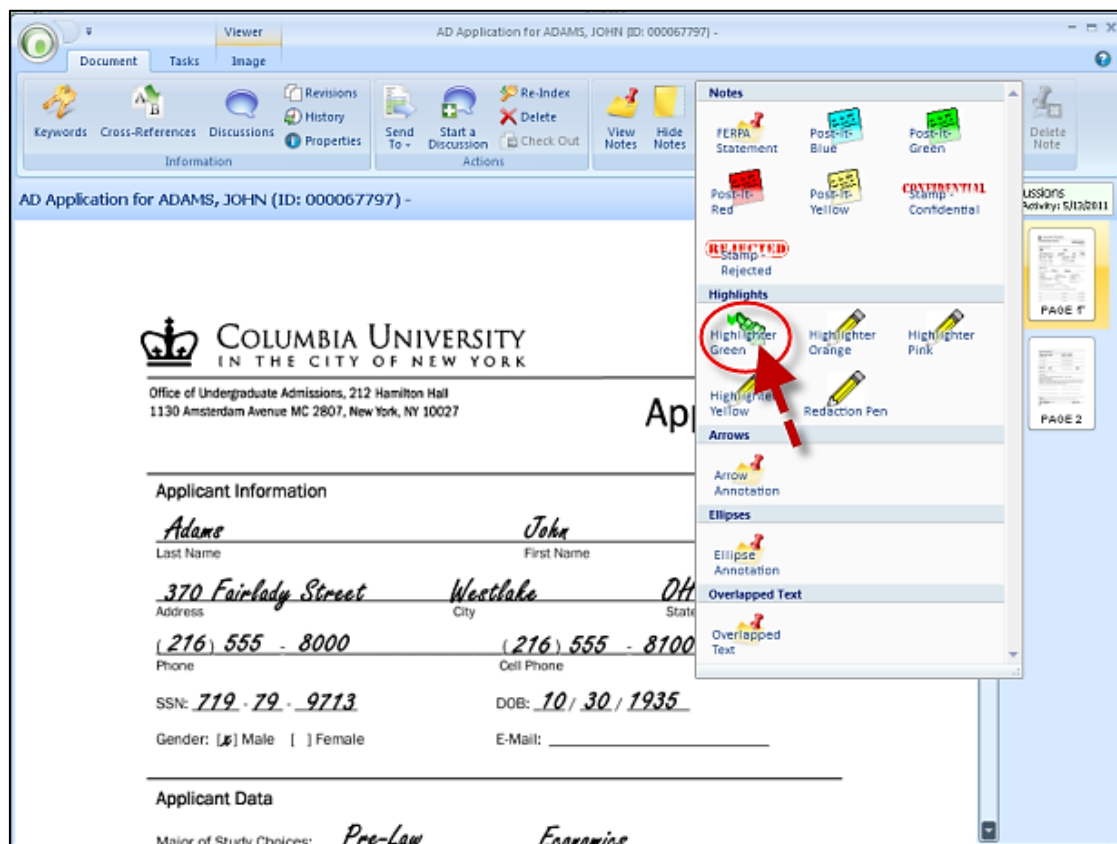
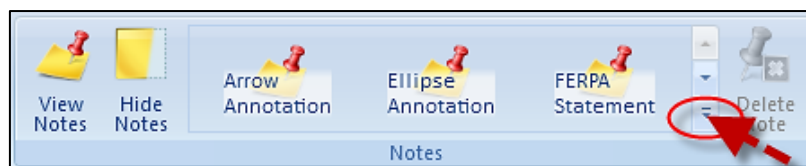
ANNOTATIONS

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:

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



2. Left-click and drag your mouse over the portion of the document that you would like to highlight.
3. Release your left-click and the highlight will appear on the document.

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

2 Pages | 1 Discussions | Last Activity: 5/12/2011

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: _____

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

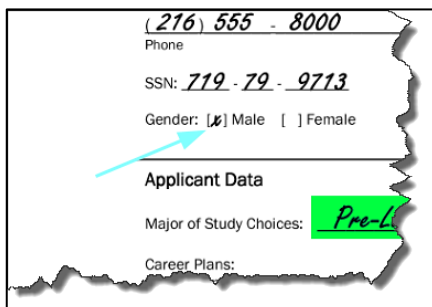
Career Plans:

<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:

1. Select **Arrow** as an **Annotation Type**.
2. 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).



To Use Overlap Text:

1. Select **Overlapped Text Annotation Type**.
2. Left-click and drag your mouse where you would like the Overlapped Text to be displayed on the document.
3. Enter the text you would like to display on the document.

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

Last Name: Adams First Name: John

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

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

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

Document Tasks Image

Keywords Cross-References Discussions History Properties Send To - Start a Discussion Check Out Re-Index Delete View Notes Hide Notes Highlighter Green Highlighter Orange Highlighter Pink Delete Note

AD Application for ADAMS, JOHN (ID: 000067797) - 12 Pages 1 Discussion 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

What a great Application!

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

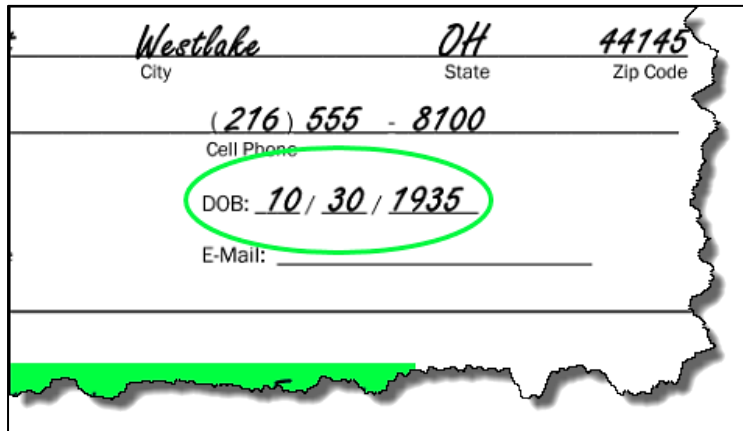
Career Plans:

☐ Academia ☐ Engineering ☐ Scientific Research
☐ Architecture ☐ Government & Politics ☐ Social/Public Service
☒ Business ☐ Information Technology ☐ Teaching

Ellipses

To use the Ellipse Annotation:

1. Select **Ellipse Annotation** from the **Note** selection
2. 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).

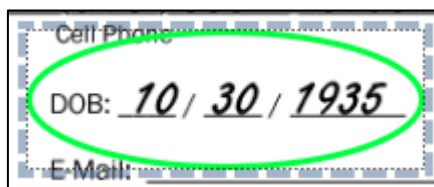


A form with handwritten entries: City: *Westlake*, State: *OH*, Zip Code: *44145*, Cell Phone: *(216) 555 - 8100*, and DOB: *10 / 30 / 1935*. A green ellipse is drawn around the DOB field. The E-Mail field is empty. The bottom of the form has a green highlight.

Deleting Annotations

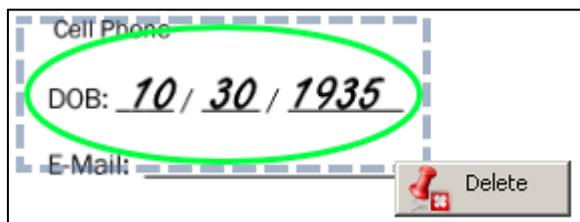
To delete an annotation:

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



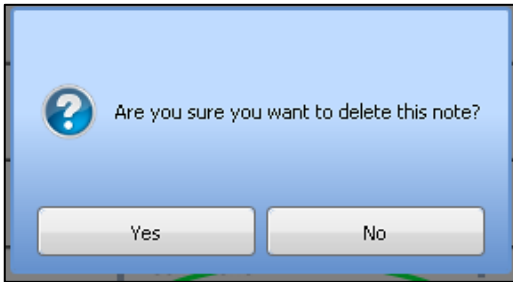
The same form as before, but the DOB field is now enclosed in a gray dashed border, indicating it is selected. The green ellipse is still present.

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



The same form as before, but a right-click context menu is visible next to the selected DOB field, showing a red pushpin icon and a **Delete** button.

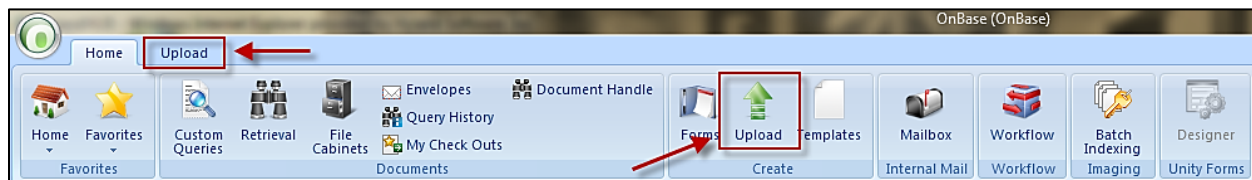
3. Select **Delete**. Select **Yes** when it asks Are you sure you want to delete this note?



UPLOAD

Import an Electronic Document

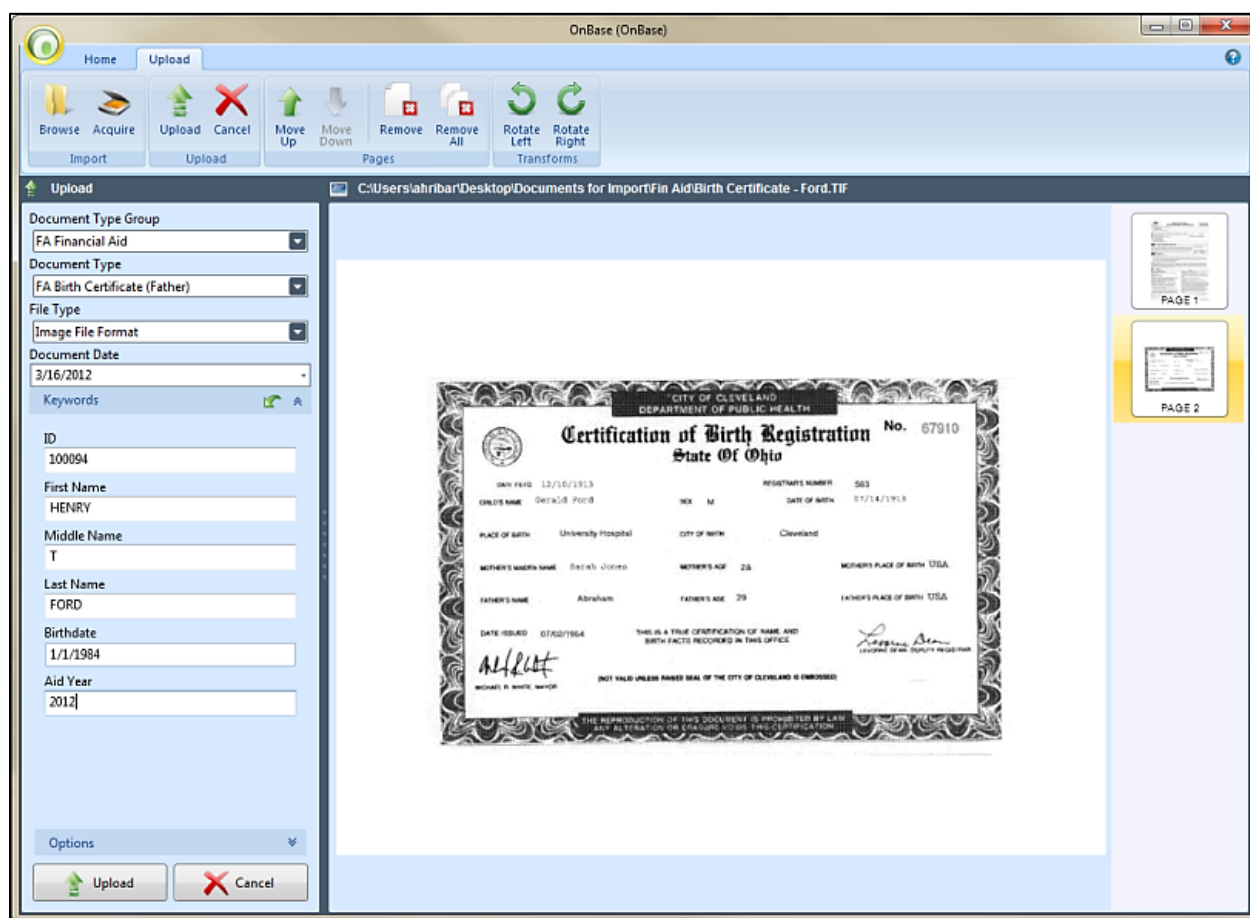
1. Select the **Upload** button or select the **Upload** tab.



2. Select **Browse**.



3. Select a document from your workstation or on a network location. A preview of the document will appear in the window.

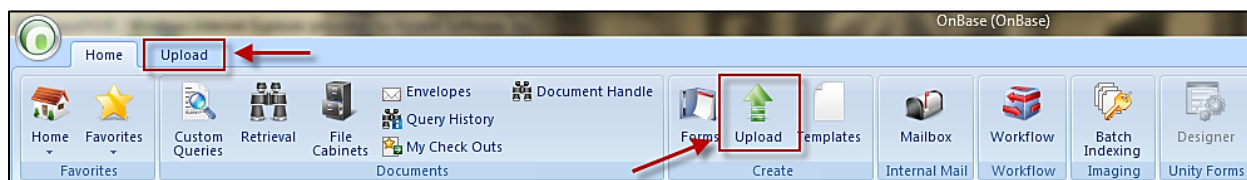


4. Index the document with information such as **Document Type Group**, **Document Type**, and any necessary **Keywords**.
5. Select **Upload** when finished.



Scan a Document

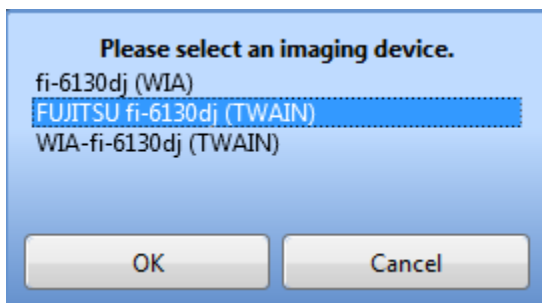
1. Select the **Upload** button or select the **Upload** tab.



2. Select **Acquire**.

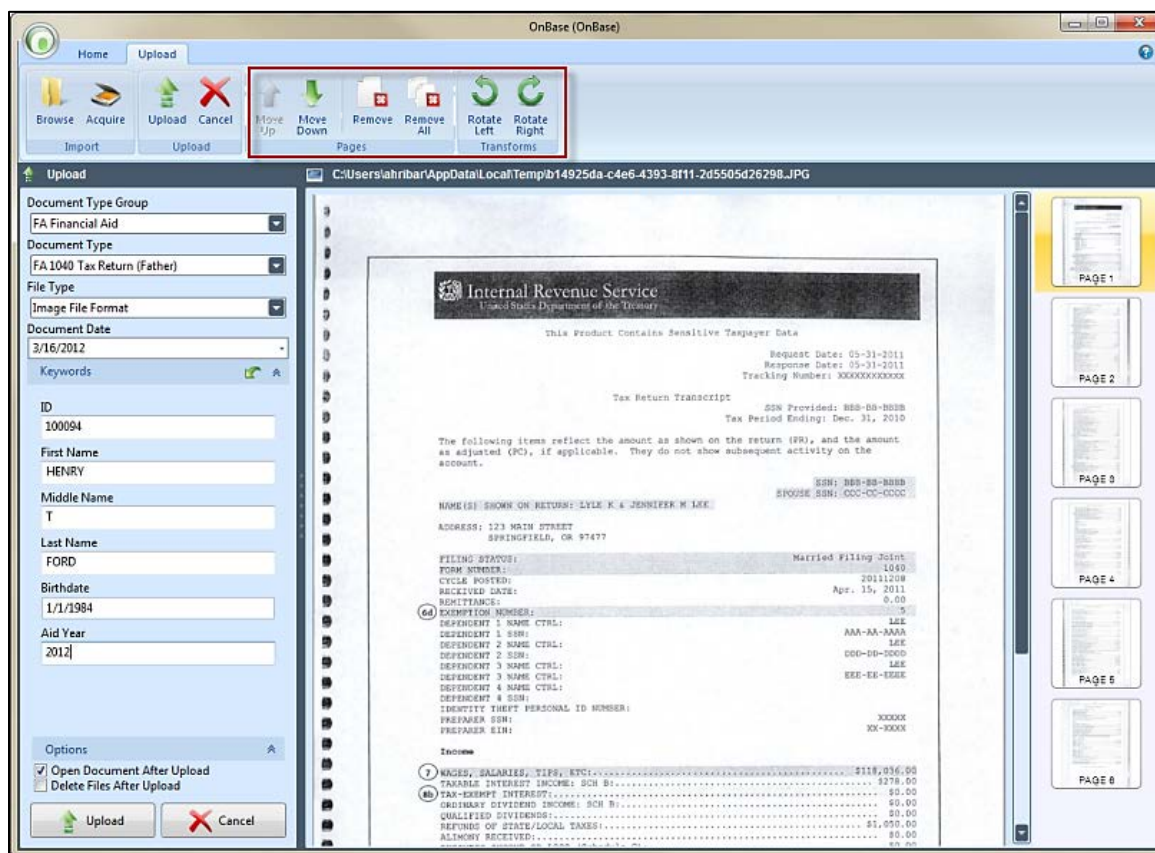


3. Select an **Imaging Device** and then select **OK**. (A compatible scanner must be attached and configured to the workstation).



4. The scanner device interface opens. Select appropriate criteria such as **Resolution**, **Simplex** or **Duplex**, **Paper Size**, and **Color** or **Black and White**.
5. Select **Scan**.

The image appears in the **Preview** window.



Pages can be reordered by selecting **Move Up** or **Move Down**. Delete pages by selecting **Remove**. **Rotate Image Left or Right** as well.

6. Index the document with information such as **Document Type Group**, **Document Type**, and any necessary **Keywords**.
7. Select **Upload** when finished.



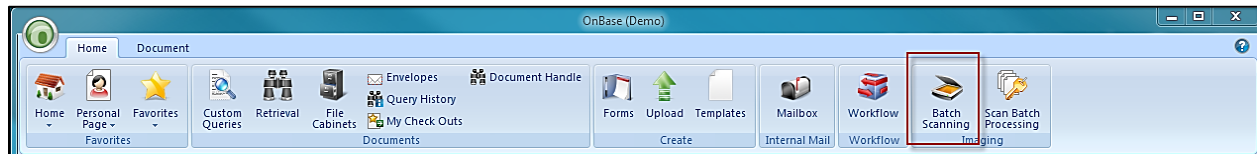
Items to Note:

Ad-hoc Scanning is used to scan ONE document (either a single page or multi-page) at a time. Meaning if you try to scan multiple documents, there is no way to separate/split them (using this feature).

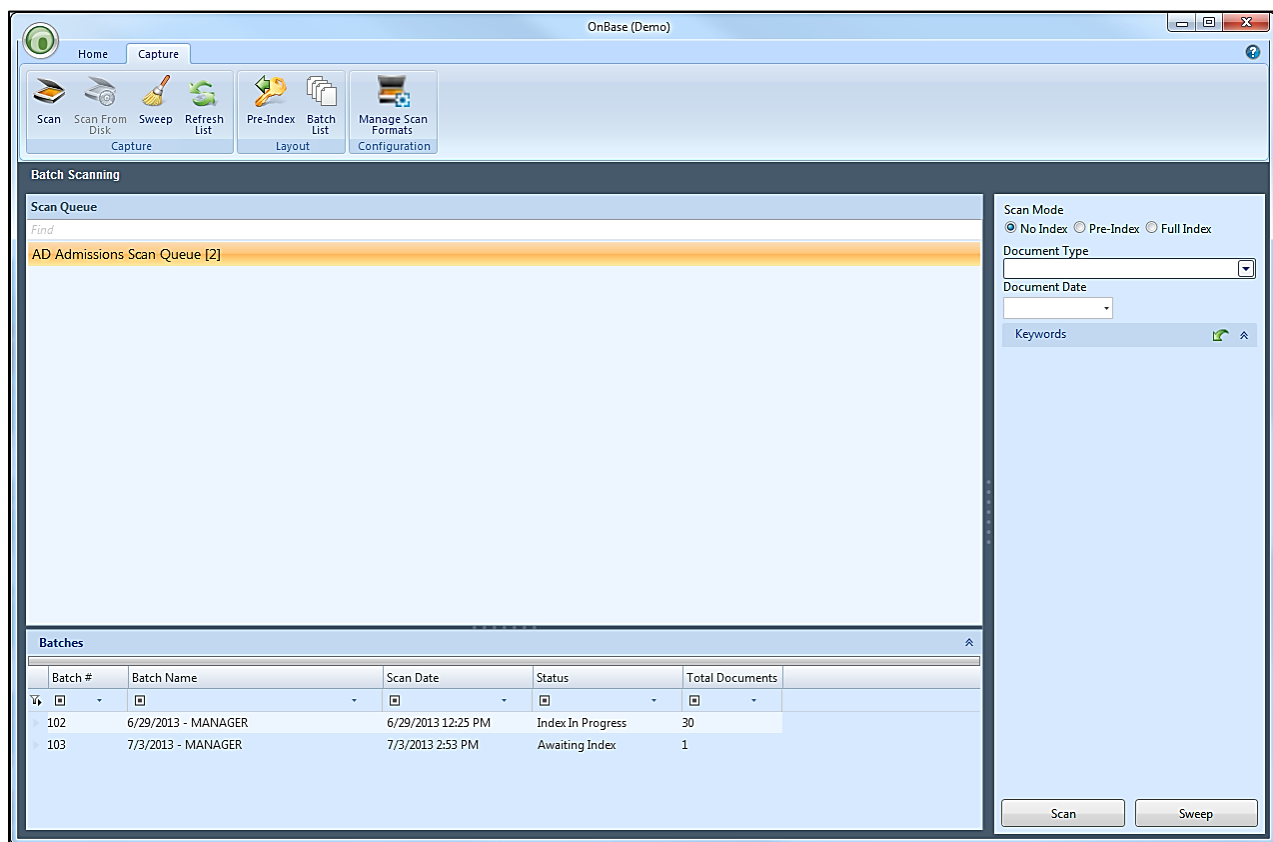
Say you scanned a document and forgot to add a page. As long as you did not select 'Upload' after indexing the document, you can press the 'Acquire' button again, and the additional page(s) will appear in the 'Preview'.

BATCH SCANNING

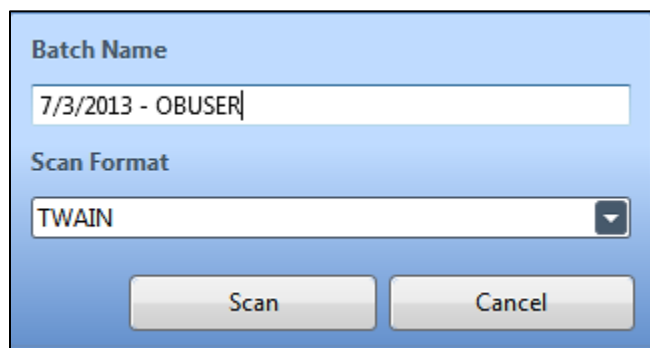
Batch Scanning is where batches of documents can be Scanned or Swept into OnBase.



1. Select a **Scan Queue** to scan or sweep documents into. Scan Queues vary by department or Document Type, such as Admissions Documents Scan Queue or Transcripts Scan Queue.

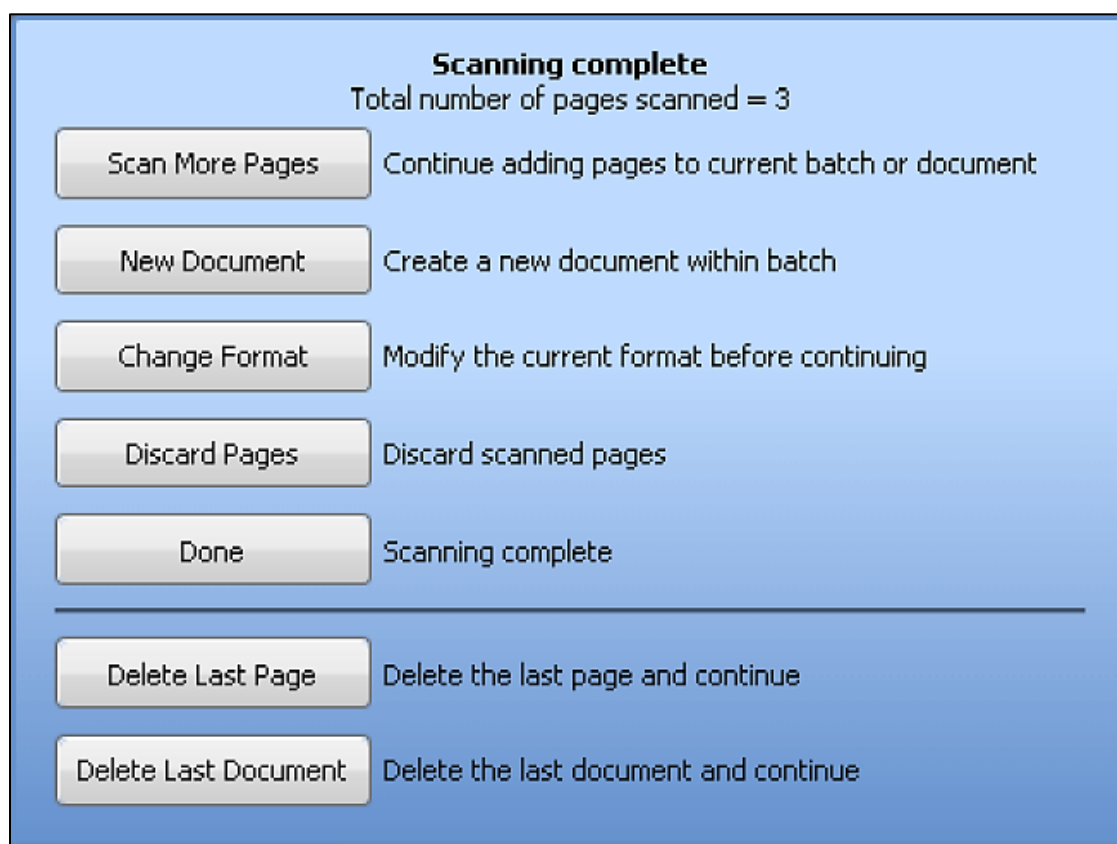


2. Select **Scan** to bring in paper documents or **Sweep** to browse to a directory and import electronic documents.
3. Enter a **Name** for your batch and select a **Scan Format**.



A dialog box titled "Batch Name" with a text input field containing "7/3/2013 - OBUSER". Below it is a "Scan Format" section with a dropdown menu showing "TWAIN". At the bottom are "Scan" and "Cancel" buttons.

4. After documents are finished scanning, a dialog box appears asking if you are complete with scanning, select **Done** if finished.



A dialog box titled "Scanning complete" with the text "Total number of pages scanned = 3". It contains several buttons with descriptions:

Button	Description
Scan More Pages	Continue adding pages to current batch or document
New Document	Create a new document within batch
Change Format	Modify the current format before continuing
Discard Pages	Discard scanned pages
Done	Scanning complete

Delete Last Page	Delete the last page and continue
Delete Last Document	Delete the last document and continue

The batch will be saved and appear in **Awaiting Index** or **Index in Progress** queue for Indexing.

BATCH INDEXING

Indexing is the process of applying Document Type and Keyword, or index, values to the document.

The **Scan Batch Processing** button allows a user with appropriate rights to view scanned batches either by **Scan Queue** processing status or **Scan Queue** name.

1. Select a batch with a status of **Awaiting Index** or **Index in Progress**, right-click and select **Index Documents**. The number next to each **Scan Queue** status represents the number of batches in that processing queue.

OnBase (Demo)

Home Scan Batch Processing Document

Filter Scan Queues Configuration Configure Keyword Panel Refresh List Browse

Scan Batch Processing

▲ Status Queues

- Awaiting Ad Hoc Advanced Capture
- Awaiting Index [1]
- Index In Progress [1]
- Awaiting Ad Hoc OCR [0]
- Awaiting Commit [0]
- Committed [0]

▲ Scan Queues

- AD Admissions Scan Queue [2]

Awaiting Index

Scan Queue	Batch #	Batch Name	Scan Date
AD Admissions Scan Queue	103	7/3/2013 - MANAGER	7/3/2013 2:53 P

Indexing

The **Indexing** pane is displayed when a batch is opened for indexing. It contains all of the options needed to navigate and index the documents in the batch.

1. Select a **Document Type** and add appropriate keywords (index values) for the document.

Document Type
AP - Vendor Invoice

Document Date
10/6/2011

Keywords

PO #

Vendor #

Vendor Name

Invoice #

Invoice Amount

Index Append Scan Undo

Split Documents

1. With the multi-page document selected, select the thumbnail of the page that is to be the first page of the newly-created document. This page is displayed in detail in the **Document Viewer**.

AP - Vendor Invoice - 10/11/2011 | 6 Pages

== INVOICE == **Computers Are Us**

12345 Lincoln Boulevard, Suite 225
Lincoln, Nebraska 68501

Invoice No: 1330
Date: March 3, 2008

To: 9-Second Foods, Inc.
19000 Quickly Circle
Columbia, MO 65201

Ship To: Same

Salesperson	PO Number	Date Shipped	Shipped Via	FOB Point	Terms
Bill Smith	8881	3/3/08	UPS		2% 10; Net 30

Quantity	Description	Unit Price	Total
2	4 GB RAM Upgrade	300.00	\$ 600.00
2	Video Card	152.30	\$ 304.60
Subtotal			\$ 904.60
Sales Tax			47.70
Shipping & Handling			
Other			
TOTAL			\$ 952.30

Please make all checks payable to Computers Are Us
If you have any questions, please call 800-333-2334

Thank you for your business!!

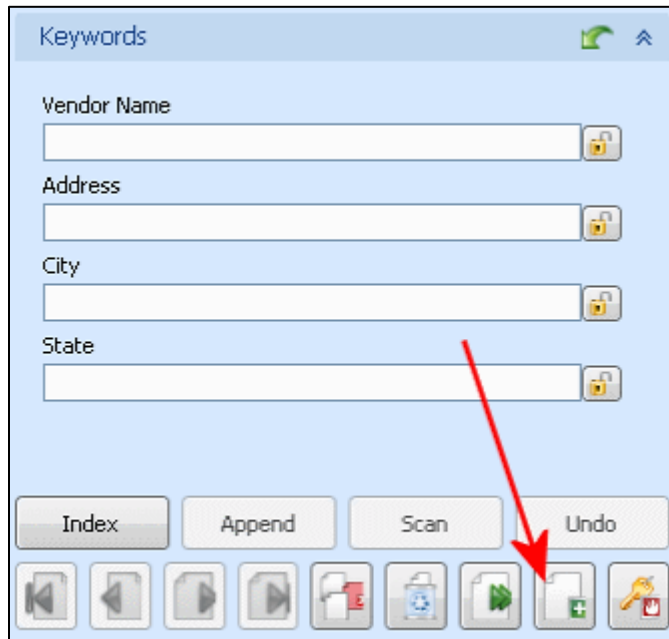
PAGE 1

PAGE 2

PAGE 3

PAGE 4

2. Select the **Create New Document** button in the **Indexing** pane.

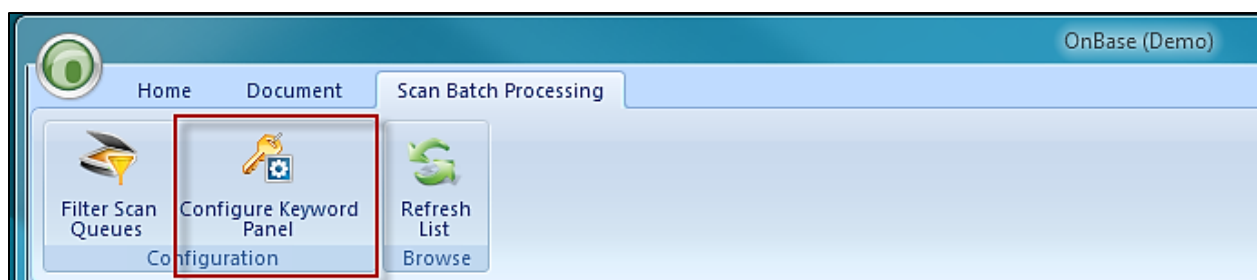


The new document is created. It consists of the currently-displayed page and all subsequent pages of the original document. The newly-created document is now the currently-selected document and it is added to the current batch after the document it was created from.

Configure Keyword Panel

Unity Client allows the user to customize which Keywords are available in Indexing. This feature may be useful for scenarios where not all keyword values need to be populated by the indexer right away, and a more targeted set of keywords is desired instead.

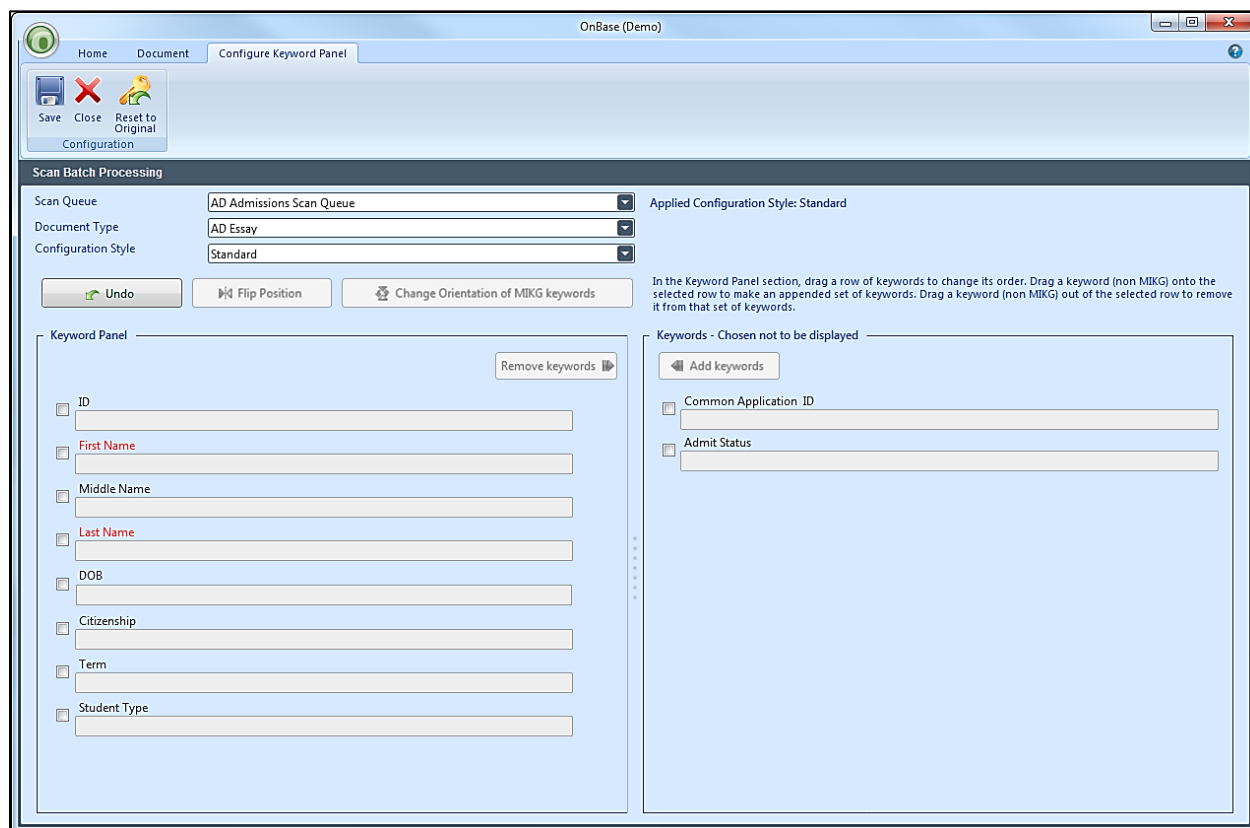
1. On the **Scan Batch Processing** tab, select **Configure Keyword Panel**.



2. Select a **Scan Queue** and **Document Type** to configure

Configuration Style allows you to select either the **Standard** keyword panel or a **Unity Indexing Form**.

Keywords on the left side are included in the Indexing panel for this particular Document Type. Keywords can be re-ordered by selecting and dragging the Keyword.



NEED HELP?

Contact the IT Help Center by phone (818-677-1400), online at (<http://techsupport.csun.edu>) or in person in (Oviatt Library, First Floor, Learning Commons).

CONTENT NOTE: The information in this guide was provided by Hyland Software, Inc. This document has been adapted for accessibility.