Florida State University

OnBase by Hyland

OnBase - Unity Client

Quick Reference Guide
Basic Functionality

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Basic Functions

Retrieval

Custom Queries

Custom Queries are pre-built searches that span a search across several different document types for your department. There is no need to select the type of document you want to search by as this has already been programmed in the back end.

1. To use Custom Queries, select the 'Custom Queries' from the top ribbon:
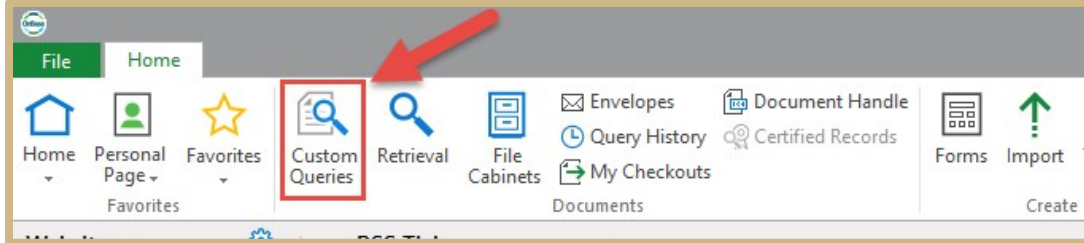
2. Once in the Custom Queries menu, select an available Custom Query from the list on the left to search by
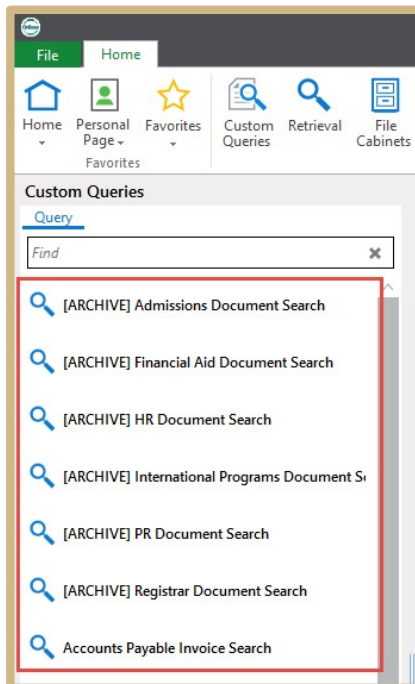
3. Once selected, the available search criteria are displayed including date options and binary operators. Enter in your search criteria and select "Search" from the bottom

4. The results from the search will be displayed. Each row represents a document in OnBase. To view a document, double-click on the appropriate row and the document will open in a new window (Note: column headers can be clicked on to organize in ascending or descending order, filter are also available)
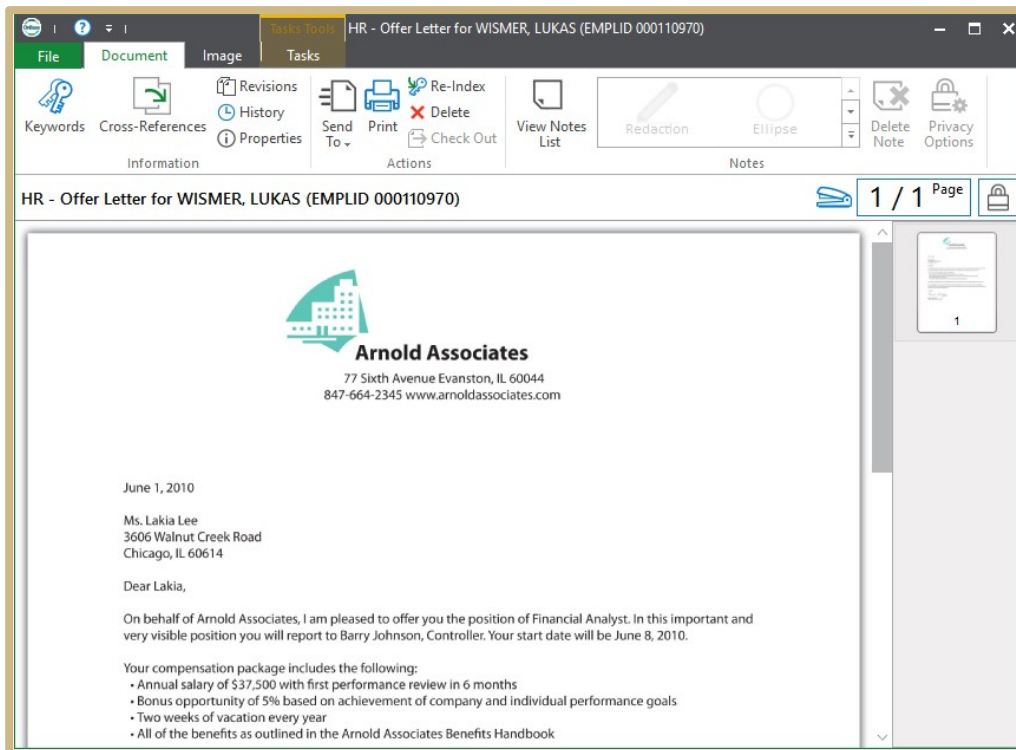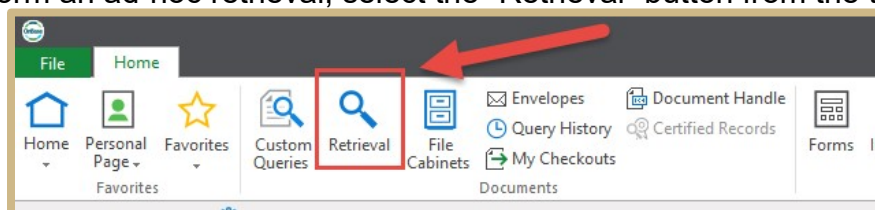
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Once opened, you can perform functions including viewing Keywords, viewing history, adding notes/redactions, etc. (these functions are all limited based on User Group provisioning)


Ad-Hoc Retrieval

Ad-hoc retrieval allows you to see and select the document types you would like to search by.

1. To perform an ad-hoc retrieval, select the "Retrieval" button from the top ribbon:

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2. In the retrieval window you can:
    1) Select the Document Type Group you want to search by
    2) Select the Document Type you want to search by
    3) Enter in your search criteria
    4) Select "Find" from the bottom
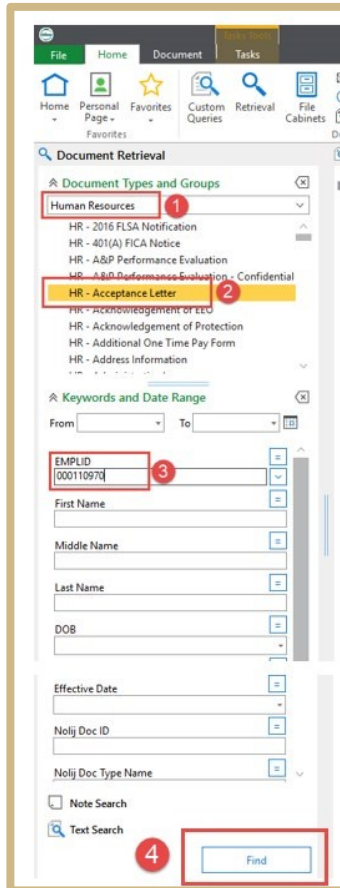
3. Search results will be displayed, with each row representing an individual document. To open the document, double-click on the row (Note: column headers can be clicked on to organize in ascending or descending order, filter are also available)

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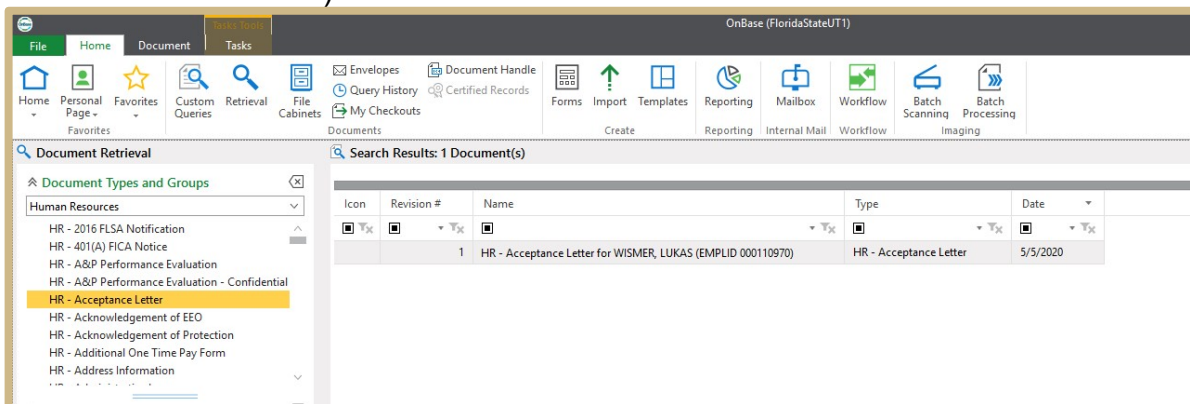
Once opened, you can perform functions including viewing Keywords, viewing history, adding notes/redactions, etc. (these functions are all limited based on User Group provisioning)
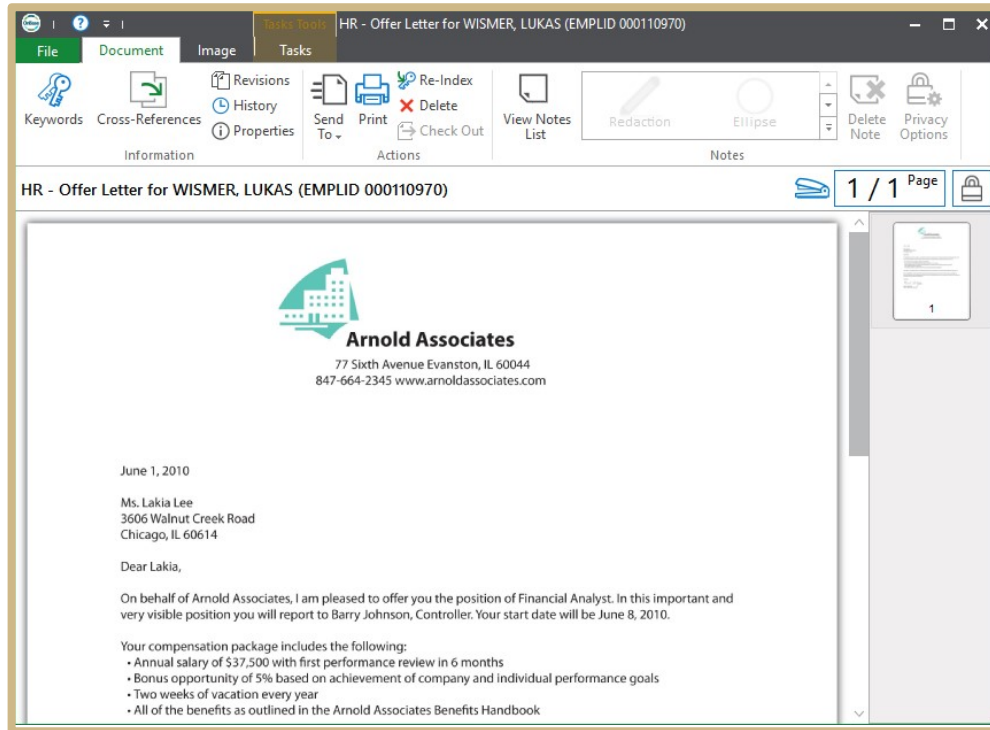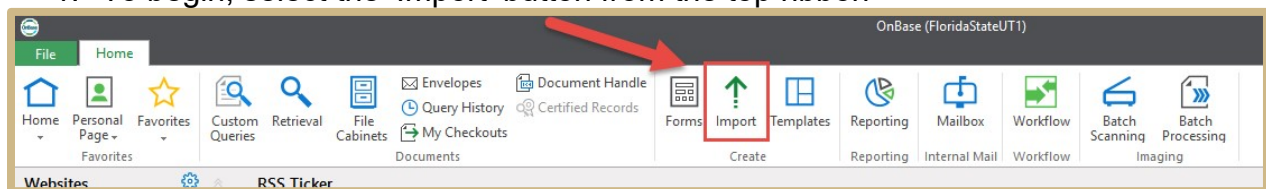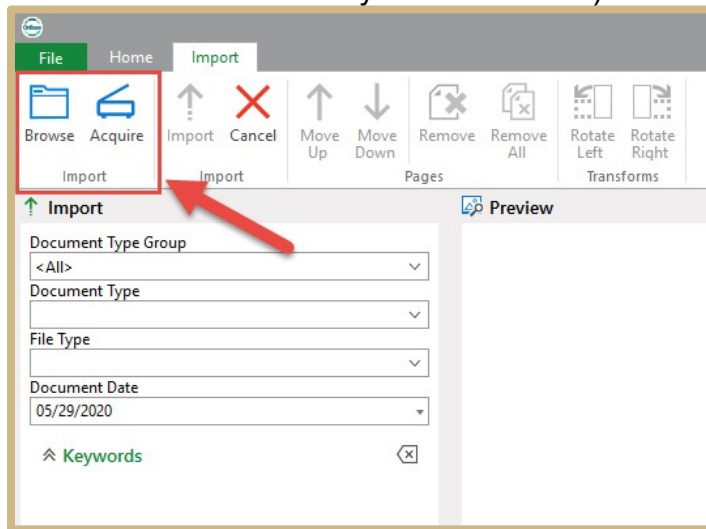

Import

Ad-hoc Import
Ad-hoc import allows you to import a single document.

1. To begin, select the 'Import' button from the top ribbon
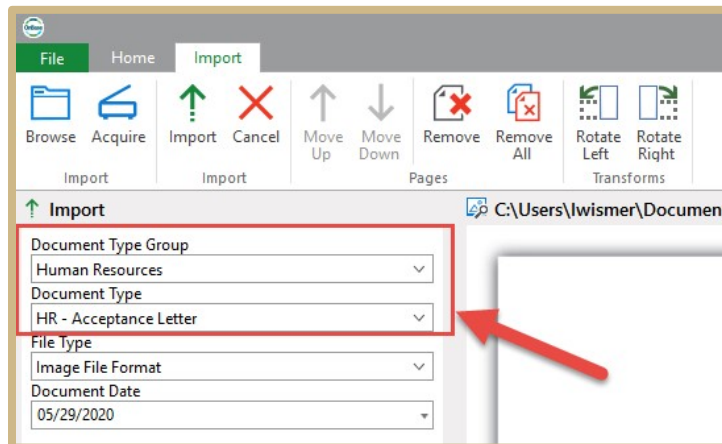
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2. The import menu will be displayed where you can begin the import process.
   - Select either 'Browse' (to browse out to a file on your computer) or 'Acquire' (to use the scanner connected to your workstation)


3. Select the Document Type Group and the Document Type you wish to index this document as

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4. A feature called a "Reverse Look-Up" is available to search by student or employee secondary information to find the EMPLID. Select the magnify glass to display the Reverse Look-Up screen, which will allow you to enter secondary information to find the record. Search, select the appropriate record and click "Select".
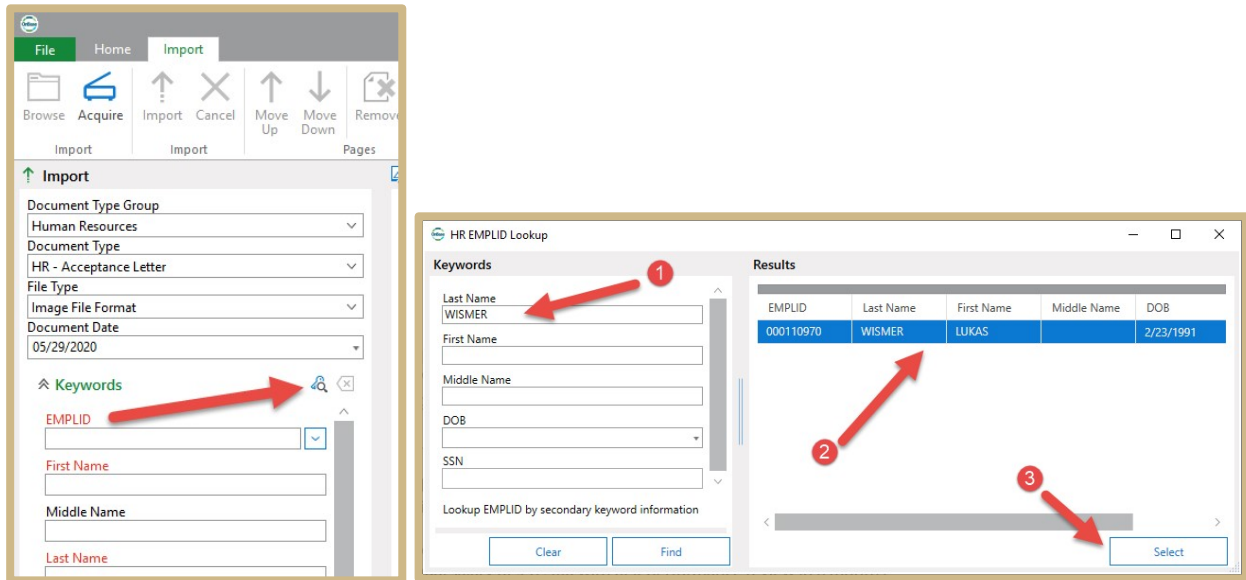
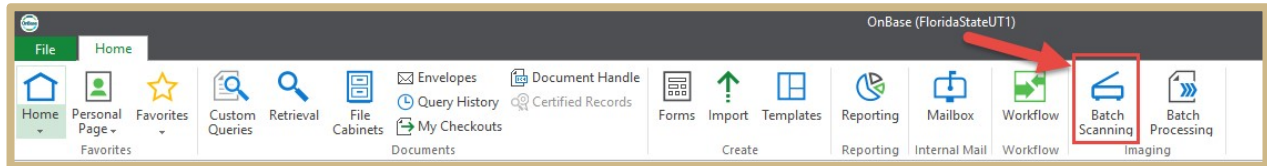5. Ensure all required Keywords are satisfied (required Keywords are in red text)
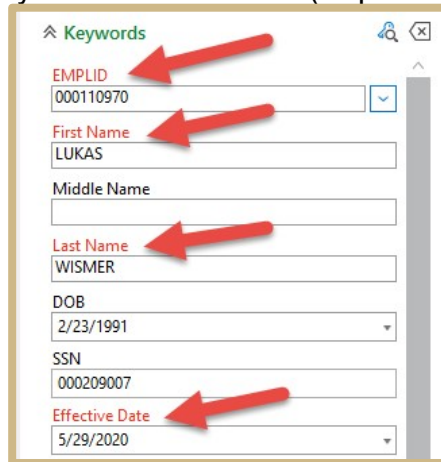
6. Select 'Import' from the bottom to import the document into OnBase

Batch Scanning

Batch scanning allows you to scan in more than one document at a time to index documents in volume.

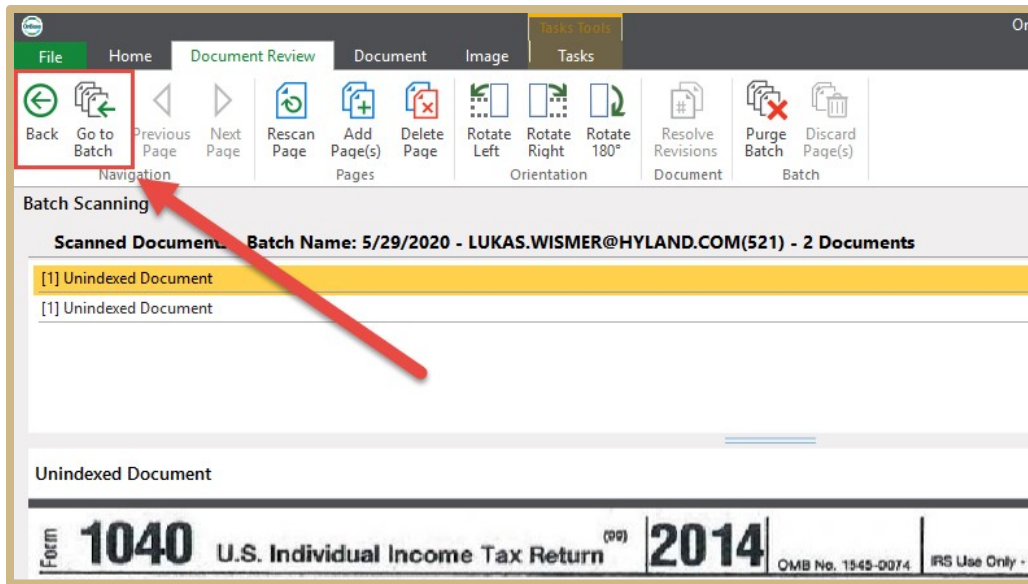1. To begin, select the 'Batch Scanning' button from the top ribbon

2. The Batch Scanning menu will be displayed. Next select the Scan Queue you'd like to scan into. Once the scan queue is selected/highlighted, select either the 'Scan' button (to use a multifunction printer/scanner) or the 'Sweep' button (to import from a network folder)
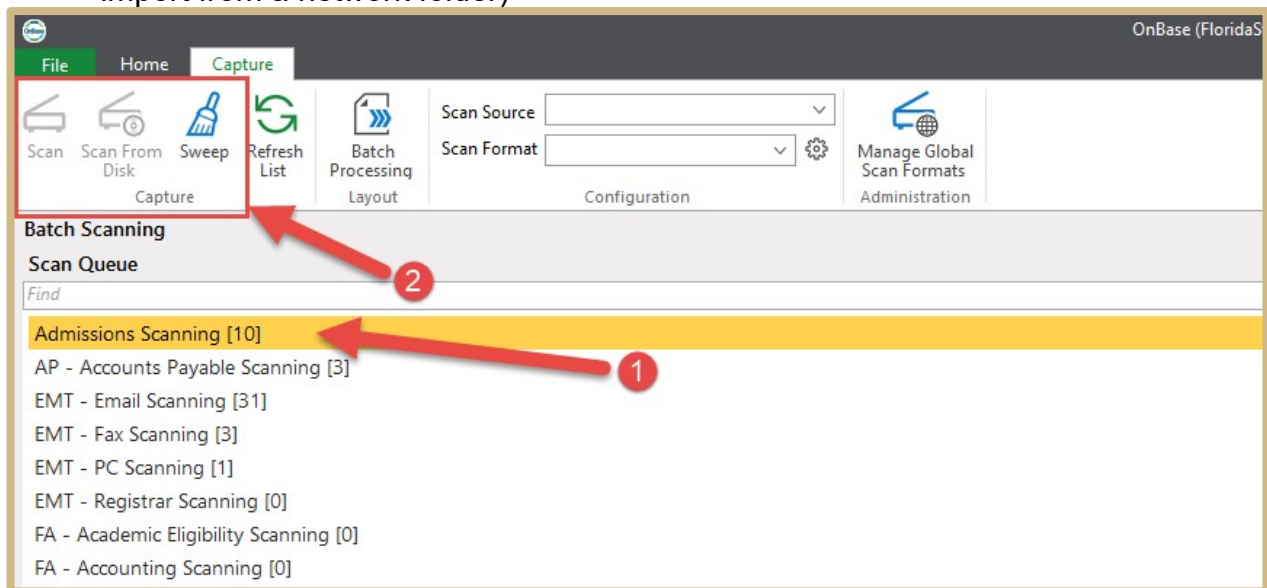
3. You may be prompted to enter a batch name. Once scanned in you'll see a preview of your documents. If satisfied with the scan, select the 'Back' button or the 'Go to Batch' button to proceed
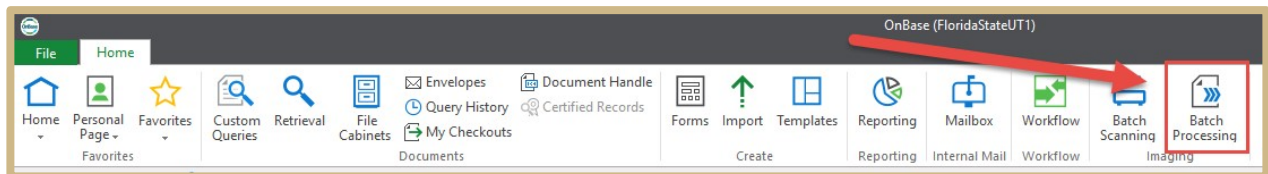
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Batch Indexing

Batch Indexing represents the process of indexing documents at a high volume.

1. To begin, select the 'Batch Processing' button from the top ribbon


2. The Batch Processing menu will be displayed, which displays both scan queues and status queues (status queues represent the logical steps inside a scan queue; Document Separation, Index, Awaiting Commit, Commit). Select your department scan queue from the left to display the list of batches in your scan queue available.

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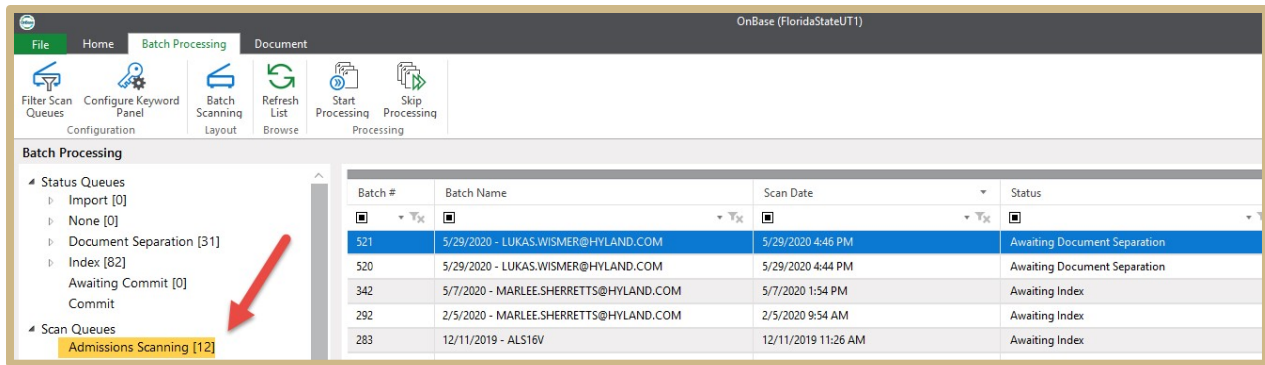
3. To begin working on your batch of documents, right-click on your batch and select "Perform Document Separation"
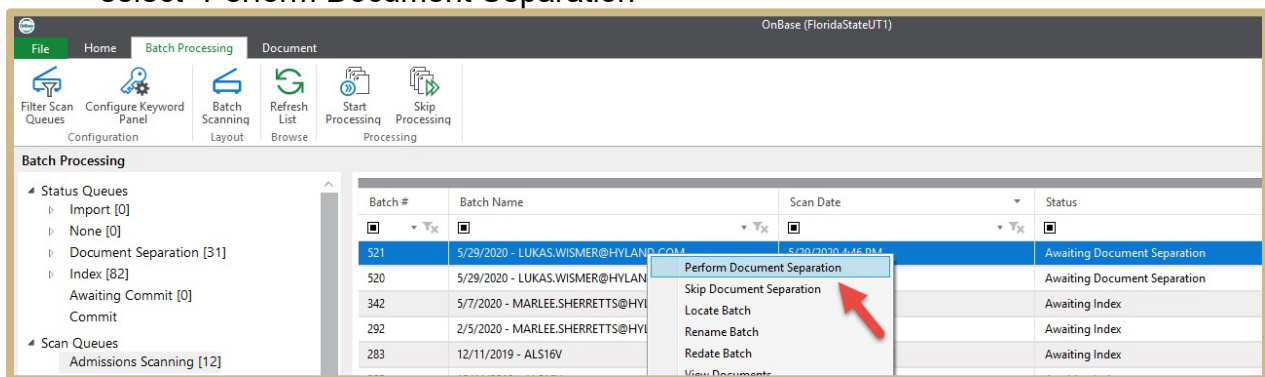
4. The Document Separation window will be displayed. This allows you to separate out a 2 page document from a single page document from a 4 page document. This menu also allows you to delete any blank pages that may have been scanned in by accident. You can select the 'Display Mode' button to toggle which display you prefer. You can select the 'Thumbnail Settings' button to increase the size of the images

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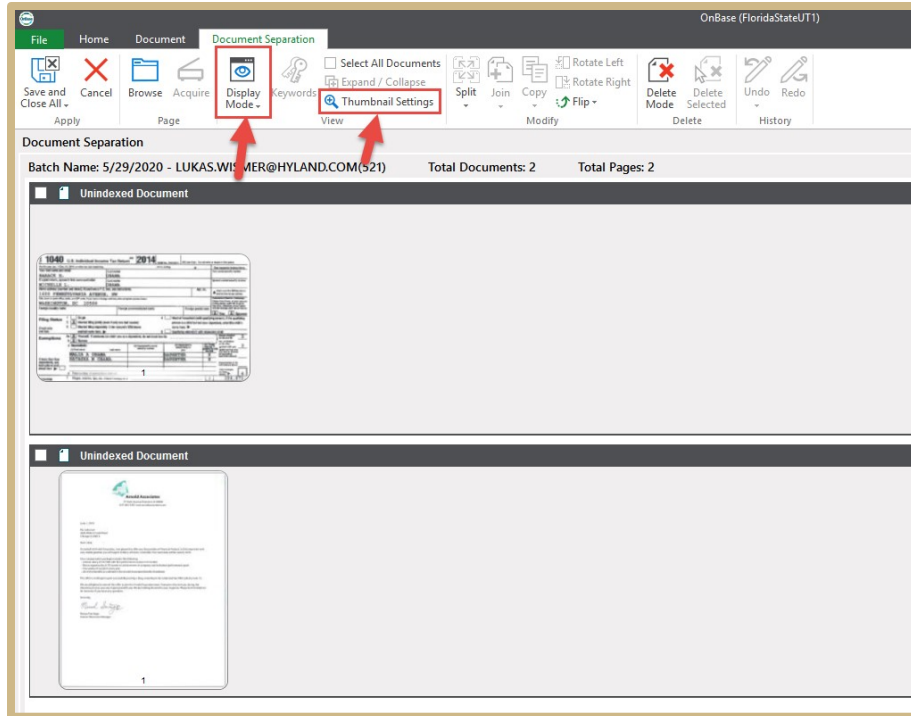
5. The below image shows a single two-page document. If you know these are 2 one-page documents and you need to split these, move your cursor in-between the pages and select the scissors button to separate these

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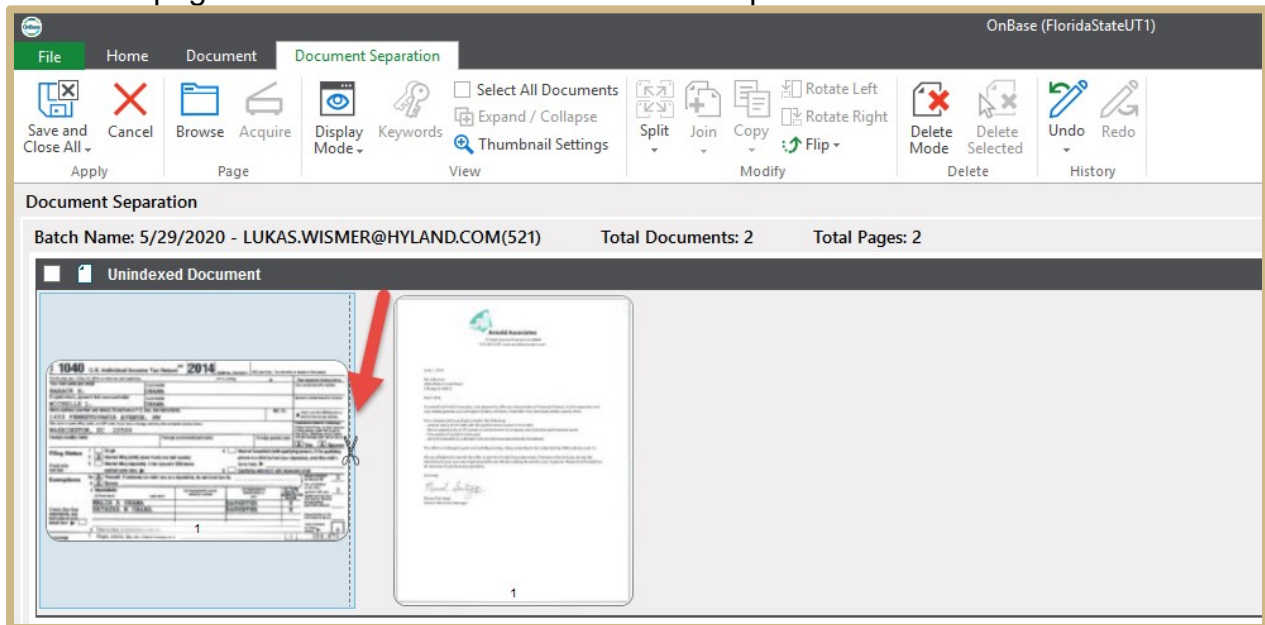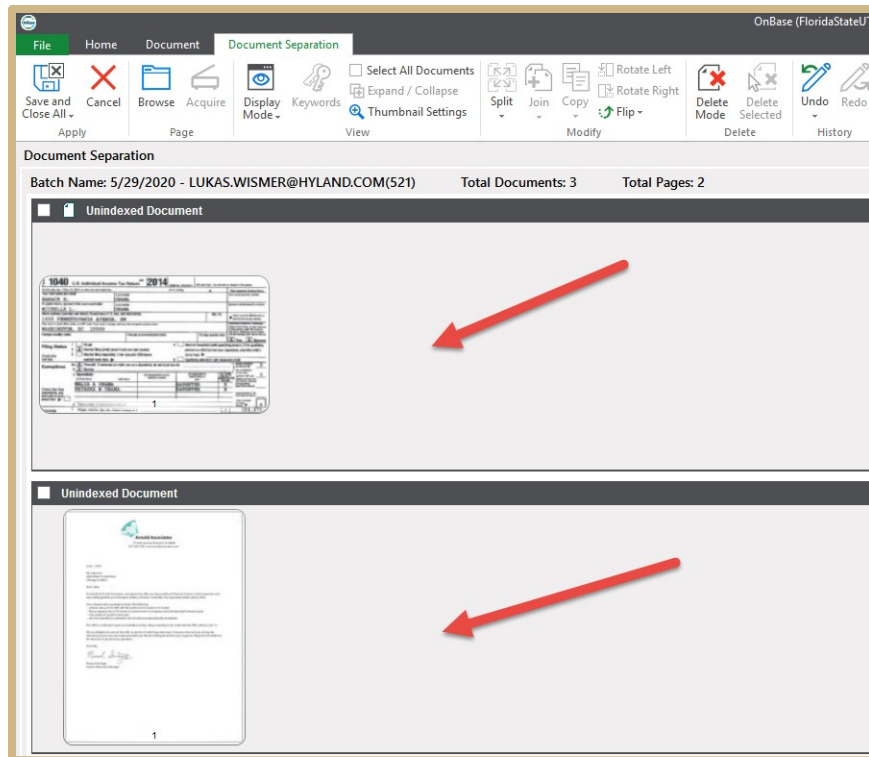
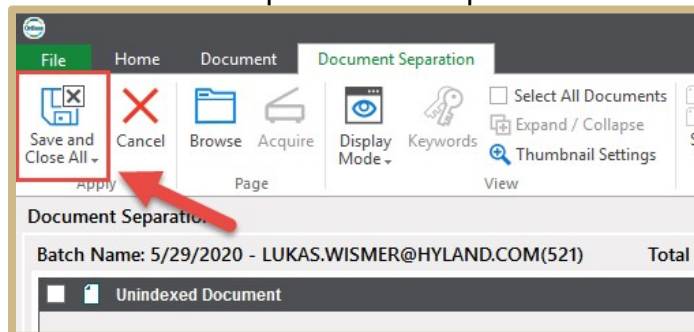6. The below image shows 2 one-page documents. if you know this is a single twopage document, move your cursor in-between them and select the paperclip button that displays.

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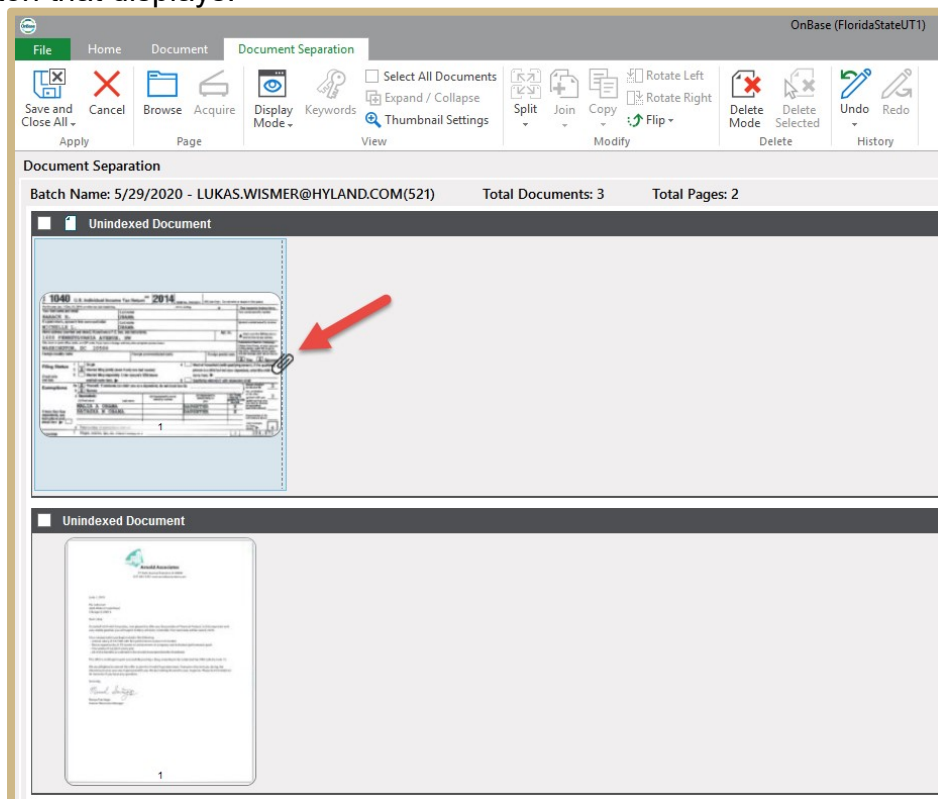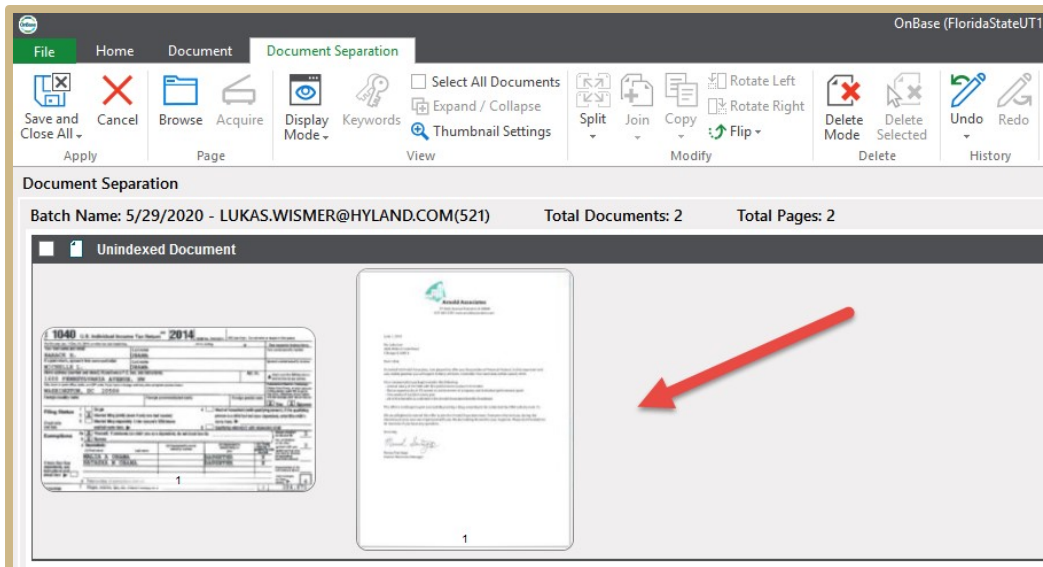
7. Once satisfied, select 'Save and Close All' from the top ribbon. This will move your documents to the next step in the scan queue called "Index"


8. To begin indexing your batch of document, find your batch (ensure the status column indicates it's in a status of "Awaiting Index"), right-click and select 'Index Documents' (Note: if your batch has a Status of "Awaiting Document Separation", refer to steps 3-7 above
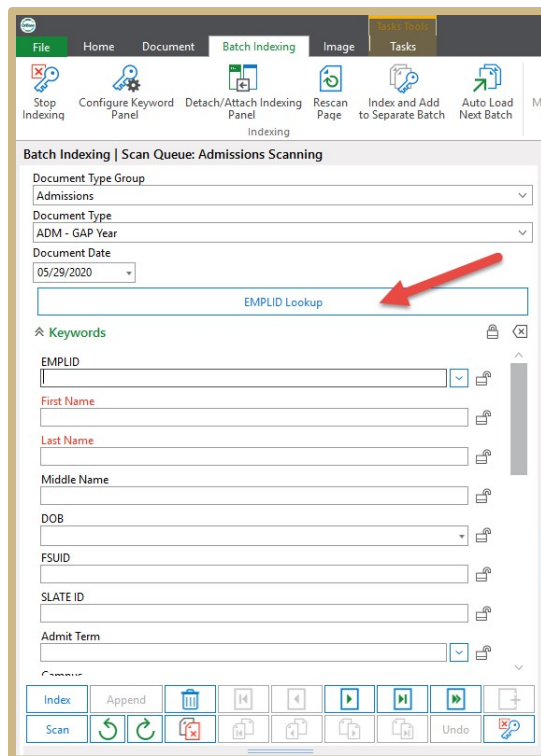
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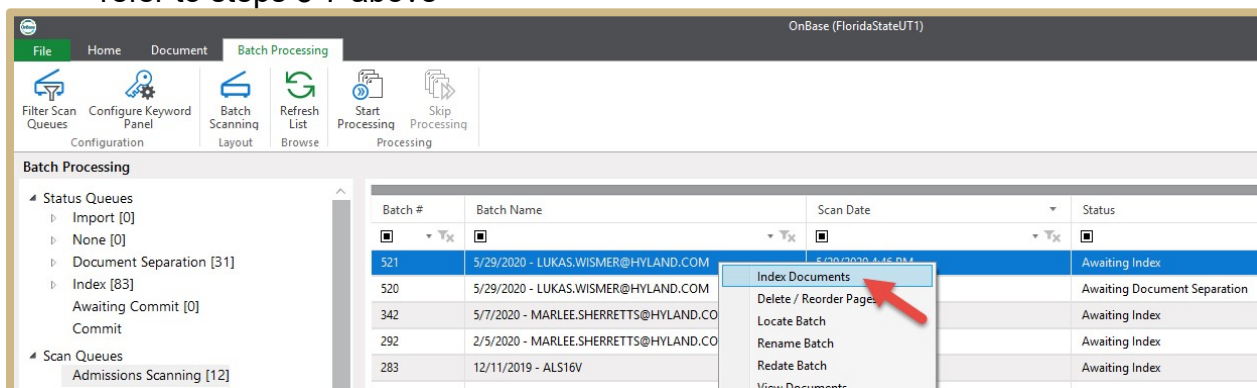
9. The indexing menu will be displayed. To begin indexing the document, select the Document Type Group and the Document Type from the left
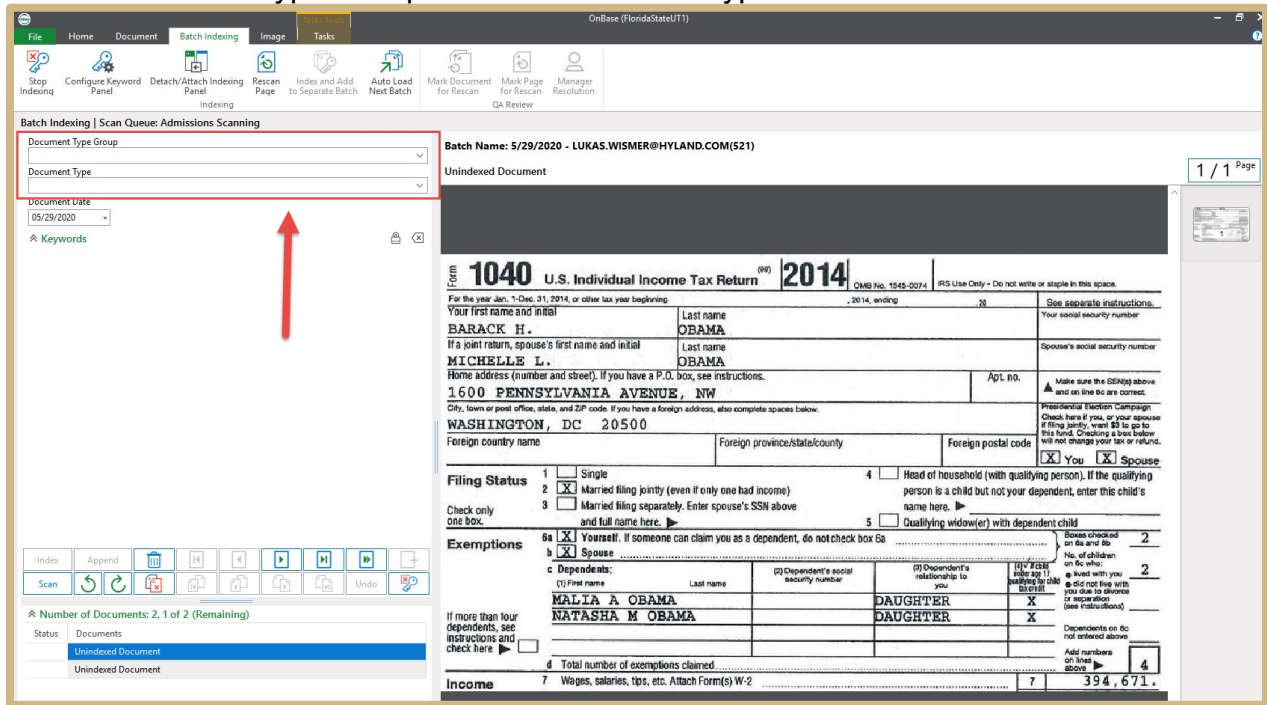
10. Once selected you can begin entering Keywords. You can leverage the reverse look-up button available to find records in the system tied to the document you're indexing

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11. Once all required Keywords have been satisfied (required keywords are marked in red) you can select the 'Index' button from the bottom to move onto the next document in the batch

12. Repeat steps 9-11 above until all documents in the batch have been indexed. Once complete, a pop-up will appear asking you what you'd like to do next. Select 'Save and Transition' to save these into OnBase.

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13. Your batch is now completely indexed and being saved into OnBase via the 'Awaiting Commit' and 'Commit' steps. Ignore batches in these steps, these are automated steps working to save these batches into OnBase.
14. You are now complete with indexing your batch and brought back to the Batch Processing screen where you can continue indexing other batches of documents.

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