OnBase Unity Client
Quick Reference Guide

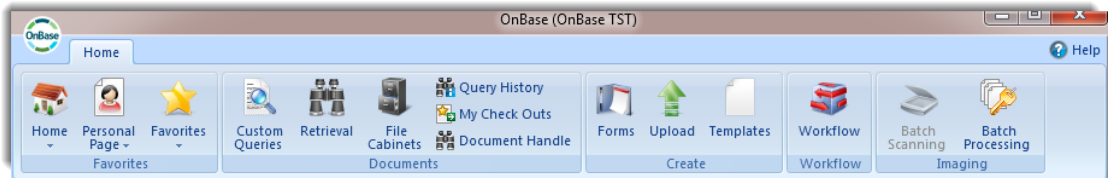
Mt. San Antonio College, IT

The OnBase Unity Client is Mt. SAC's Enterprise Content Management (ECM) system that is used to store, scan and retrieve documents.

Your access is granted based on your manager/supervisor's request.

To login, double click on the OnBase Unity Client on your desktop and use your windows credentials to login.

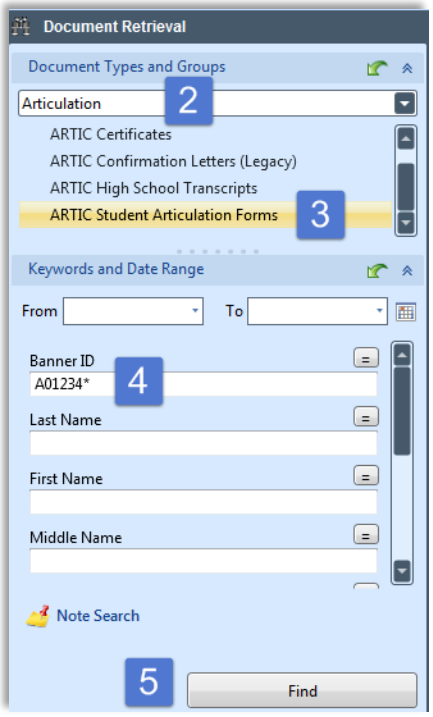
The ribbon (views and functionality will vary by access levels):



Retrieval by Document Type

First method of retrieval:

1. Click **Retrieval** on the ribbon.
2. Select a **Document Group.**
3. Select a **Document Type.**
4. Enter **Banner ID**, Last Name, Middle Name, or DOB. (Wildcards (*) can be used in these fields)
5. Click **Find**.
6. **Double-click** on document to open.

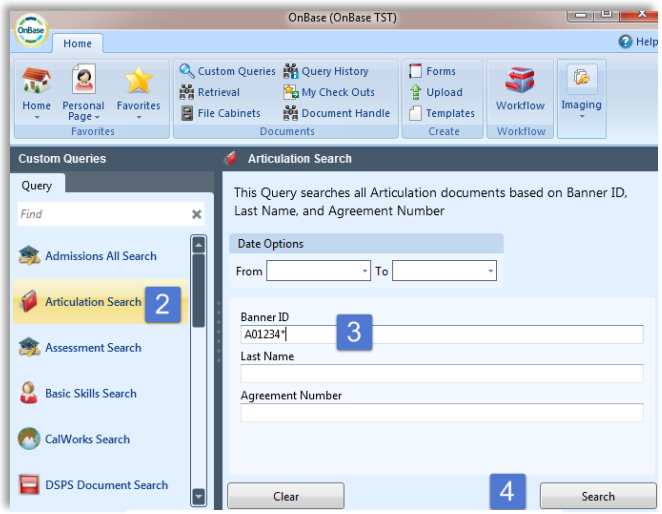


(Click on the green arrows to clear search.)

Retrieval by Custom Query

Second method of retrieval:

1. Click on **Custom Query** on the ribbon.
2. Click on the desired **Query**.
7. Enter **Banner ID**, or other search criteria. (Wildcards (*) can be used in these fields)
3. Click **Search**.
4. **Double-click** on document to open.



(Click CLEAR to clear search.)

Indexing

When uploading, scanning, or re-indexing a document use the following information:

- **Document Type Group** – Choose the department that pertains to the scanned document.
- **Document Type** – Choose the document type for the scanned document.
- **File Type** – In most cases will be left at default (Image File Format).
- **Document Date** – The document's scanned date. It is filled automatically.

Keywords:

- Input the **Banner ID** associated with the document, hit your **tab key** to populate Name & DOB.
- Check with your department on what other Keywords will be required.

Uploading

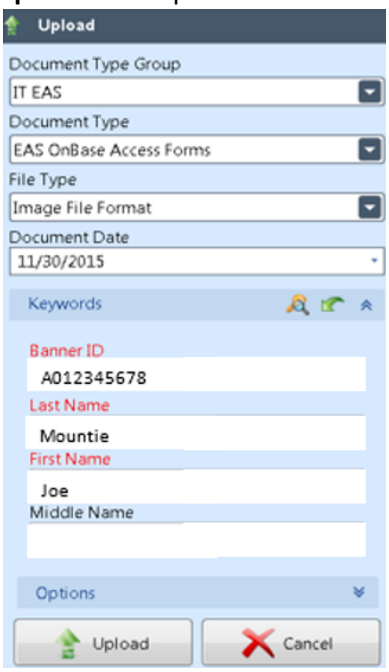
1. Click on **Upload** on the ribbon.
2. Click on **Browse** on the ribbon.
3. In the Browse window, select the document and click **Open.**
4. You will see a preview.
5. **Index** the document to complete upload.

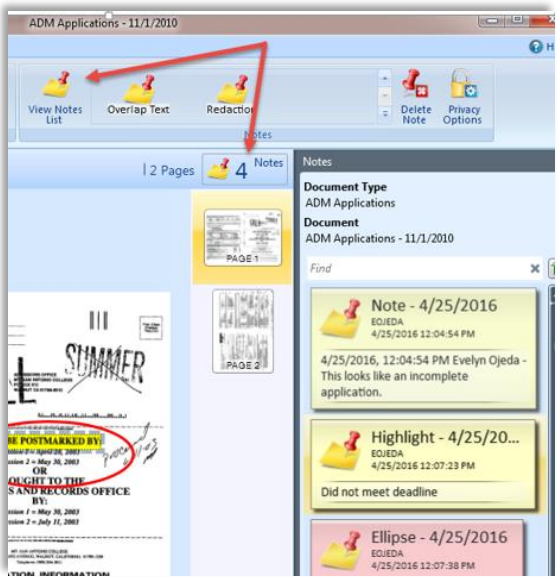
Scanning

*Note: Scanner must be pre-configured. Scan one document type at a time for each Banner ID number (student/employee).

1. Click on **Upload** on the ribbon.
2. Click on **Acquire** on the ribbon.
3. Choose the workstation scanner.
4. Click **Scan** in the dialogue box. (Image mode should be set to Black and White and resolution set to 200x 200. 300x300 maximum.)
5. Make edits or re-scan if needed using the Upload Ribbon.
6. **Index** the scanned document.

7. Click **Upload** to complete scan.



Notes

1. To view existing notes, open the document and click on the **View Notes List** on the ribbon.
2. To add a note or annotation, click on the desired note(s) in the **Notes ribbon**.
3. **Click and drag** in the area of the document where you wish to place the note.
4. To enter text, click on the note to begin typing.
5. To **delete** a note or to set **Privacy Options, right-click** on the note **or** use the ribbon options.