ONBASE UNITY VERSUS ONBASE WEB CLIENT

You can access OnBase one of two ways. The first is using the OnBase Unity Client. The Unity Client is a desktop application that is installed on your computer. It has more of a Microsoft Office user interface that people often find easier to use. It also doesn't rely on web browsers and plugins like the Web Client, so it is more consistent in functionality.

The other way is to access OnBase via the Web Client. The Web Client is used inside of a web browser. It provides almost the same functionality as the Unity Client, but the user interface is different. Employees who either don't have a school issued machine or use an Apple/Mac will have to use the Web Client.

To access the Unity Client, using your computer's start menu, type "Unity" in the search bar and select the icon that displays as a result. If you do not see it, click on the start menu again, browse through your folders/programs and look for a folder called Hyland. When you find it, click on it and choose the Unity icon. If you cannot find the folder, then you will need to submit a helpdesk ticket so that Client Services can install it on your machine.

To access the Web Client, type onbase.rccc.edu into your Web Browser. Please note that OnBase can present some complications depending on the browser you use and the version of that browser that is currently installed on your machine. If you run into problems, let us know and we can try to troubleshoot accordingly.

When using the Web Version, you may run into an issue with Active X Controls. Follow the prompts to update/change the Active X controls.

You will also need to disable pop-ups for the web version to work properly.

THICK CLIENTS AND MOBILE CLIENTS

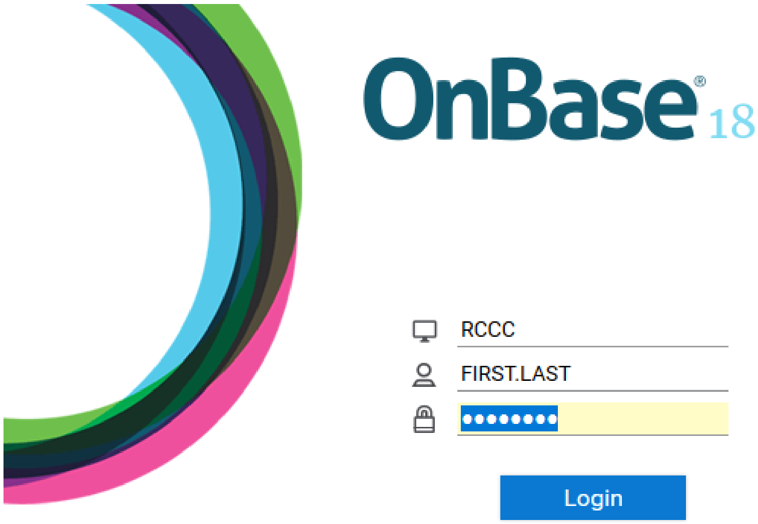
OnBase Thick Clients (also called "Scan Stations") are limited clients that have been setup across our campuses for users to scan and index in bulk. If users have questions or problems with a Thick Client / Scan Station, please submit a ticket and we will troubleshoot accordingly.

We also have limited OnBase Mobile Clients. Mobile Clients are apps that can be used on mobile devices which is not the same as accessing it via the web browser on a mobile device. These Mobile Clients are limited to a couple Cabinet Members that use Apples/Macs. If a user has questions or problems with their Mobile Client, please submit a ticket and we will troubleshoot accordingly.

LOGGING IN

Users can log into OnBase by using a username of FIRST.LAST and the same password they use to log into their computers.

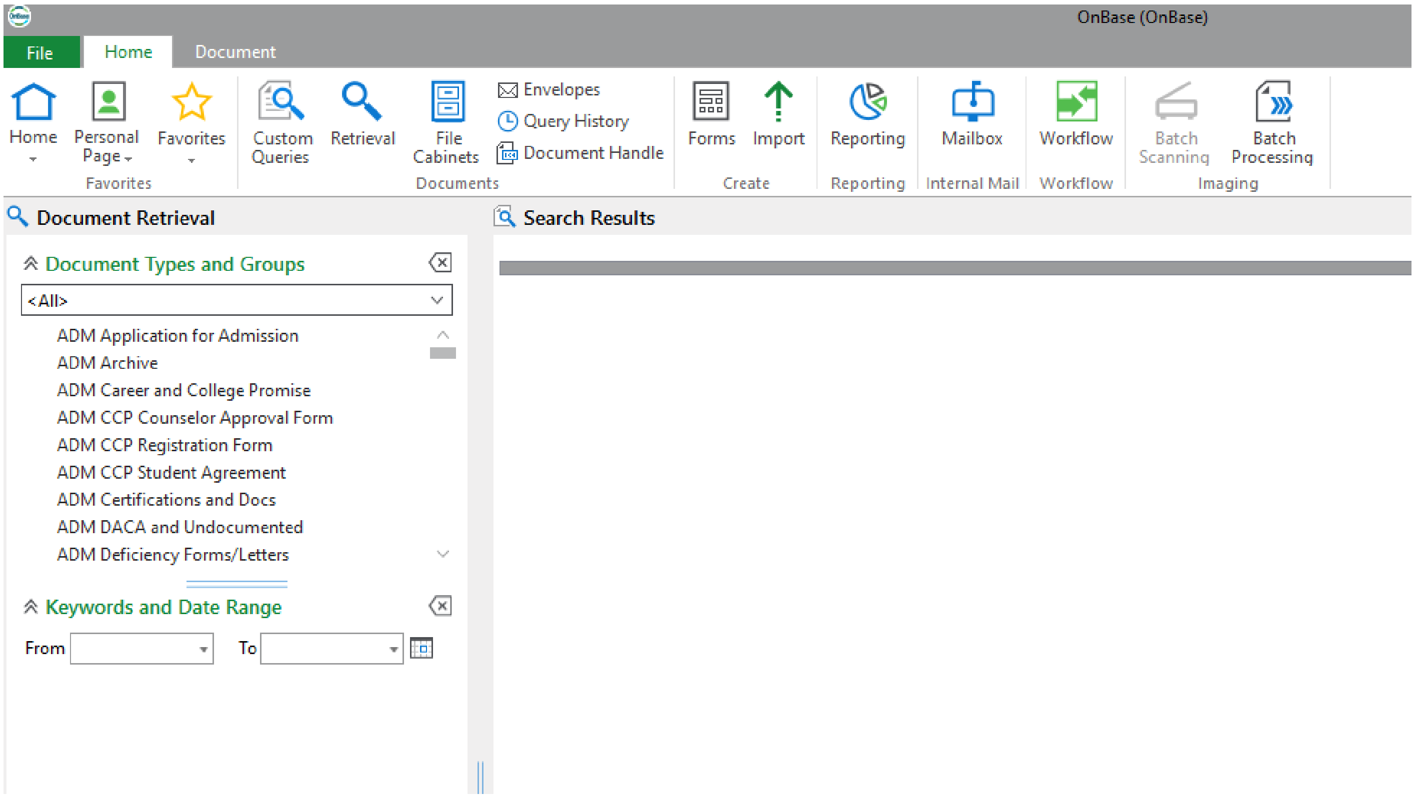
When logging in to OnBase, if a user has to enter their username, it automatically defaults to username to all caps. This is normal, and cannot be changed to all lower case. Make sure you do not accidently toggle Caps Lock during this and enter in your password incorrectly.



User accounts can be disabled due to too many failed login attempts or if they have not logged in for an extended period of time. If a user cannot login, submit a helpdesk ticket with a screenshot of the error message you receive and we will troubleshoot accordingly.

DOCUMENT RETRIEVAL

To retrieve documents in Unity Client, navigate to the “Retrieval” Icon in the top ribbon. Your window will change to the Document Retrieval view.



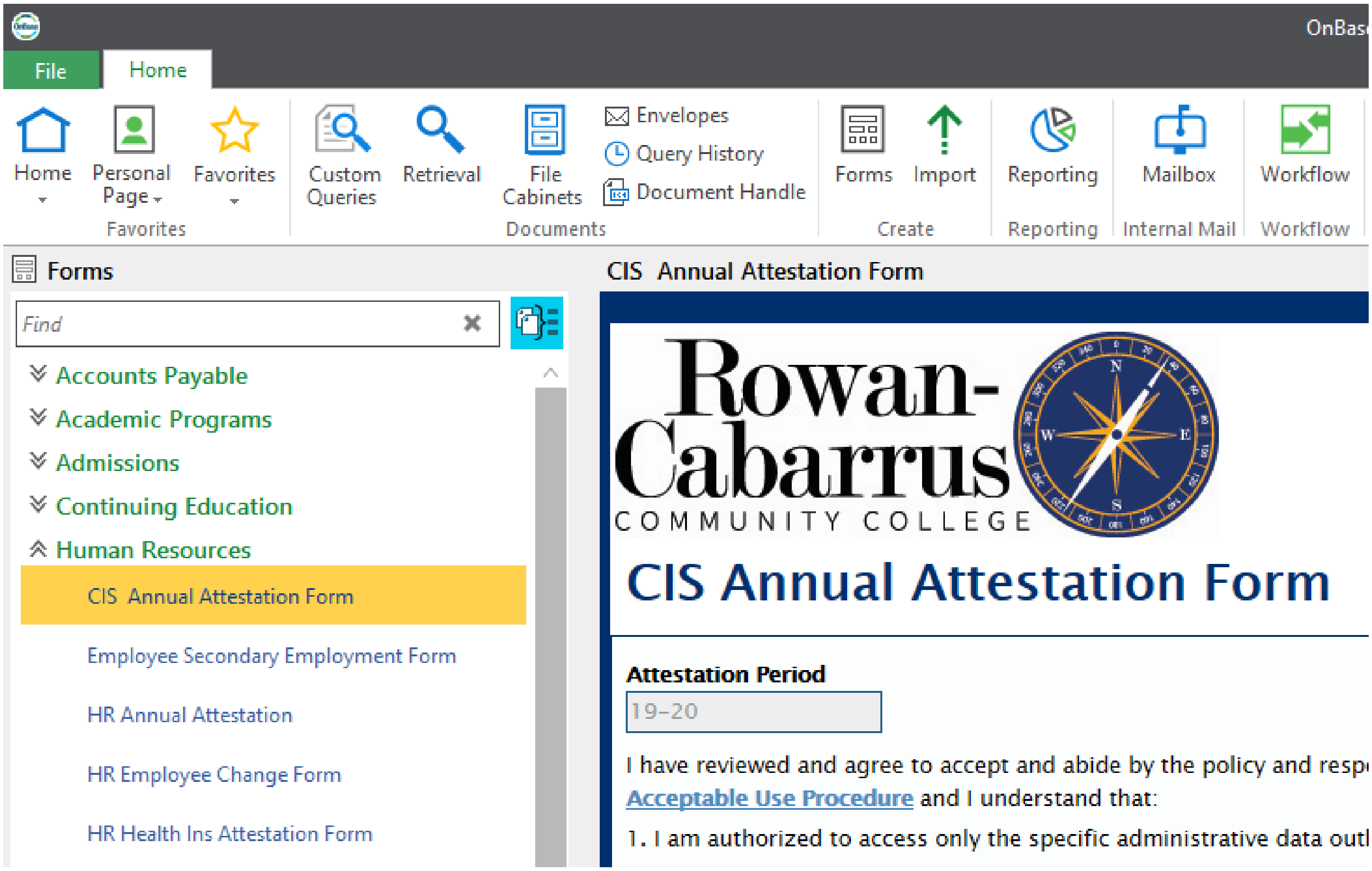
If you have access to view a document type, it will be displayed in the list to the left. You can select which group of documents to view by selecting from the list of groups in the select list below “Document Types and Groups”.

After selecting the document type you want to view, a list of keywords will display in the bottom left. You can type in the keywords you want to search on and then select “Find” at the bottom to run the search. If any documents match, they will be displayed in a list to the right. Double clicking on a result will open a new window to view the document.

Retrieving documents in the Web Client works the same way, except it defaults to the Document Retrieval view once you login.

FORMS

To submit a form in the Unity Client, select the “Forms” button in the top ribbon. Your window will change to the Forms view.



If you have access to submit the form (and depending on how it is shared per the request of the form owner) it will be displayed in the list to the left.

Some forms are accessible through Unity, some forms are only accessible via a link. Some forms work/display differently depending on the person logged in, time of year, etc. Make sure you are aware of the form and workflow you are trying to use so that you complete it appropriately.

After you select the form in the list, it will display in the viewer to the right. Fill out the form as prompted and submit it once you are done. Depending on how the form owner requested workflows and notifications, you may or may not receive a confirmation once it is submitted.

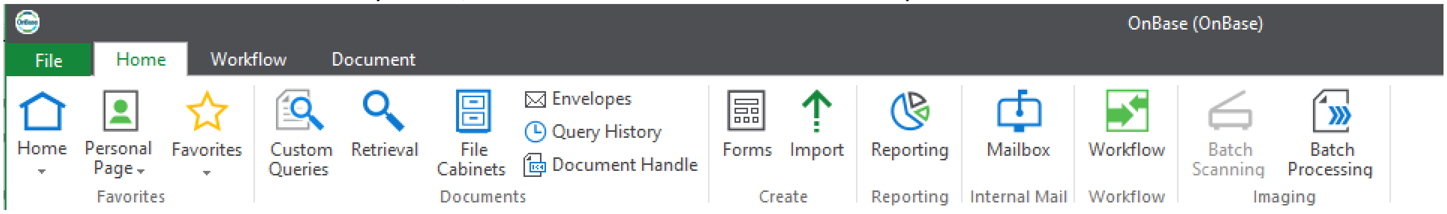
Using forms in the Web Client functions the same as the Unity Client, however, accessing them is a little different. After logging into the Web Client, in the top left corner, there is an image of three stacked lines. Click on it and a drop down menu will open. Select "New Form" to access the list of forms you are able to submit.

If users have questions about how to fill out a form or the process of a form, they can reach out to the form or process owner. If the form is not functioning properly, the form owner will submit a ticket and we will troubleshoot accordingly.

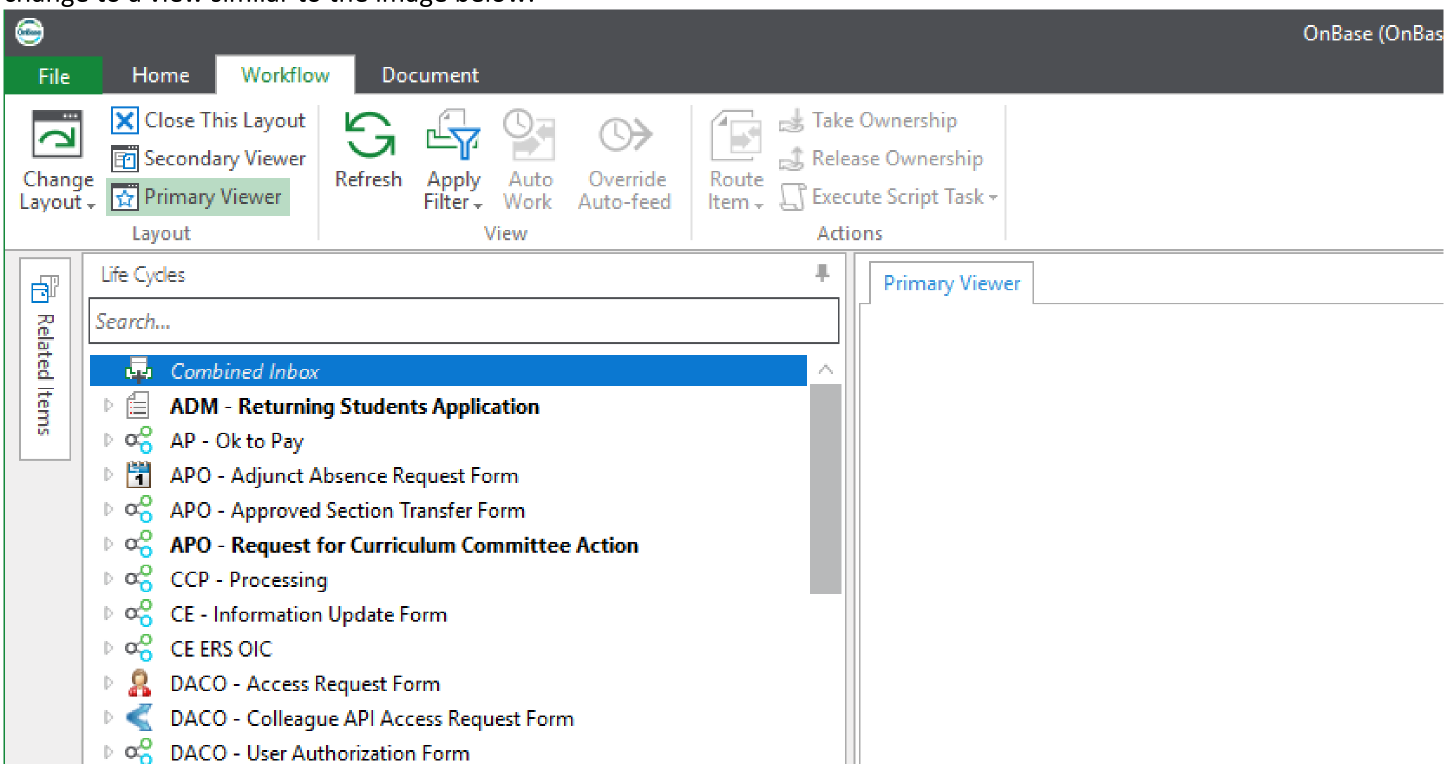
ACCESSING WORKFLOW

A lot of the forms we use trigger workflows to manage approvals, processing, notifications and archiving. If a user needs to access workflow, they can use either the Unity or the Web Client.

To access Workflow in the Unity Client, select the “Workflow” icon in the top ribbon.



Workflow is a separate tab, as you can see in the next image. After selecting the “Workflow” icon, your window will change to a view similar to the image below.



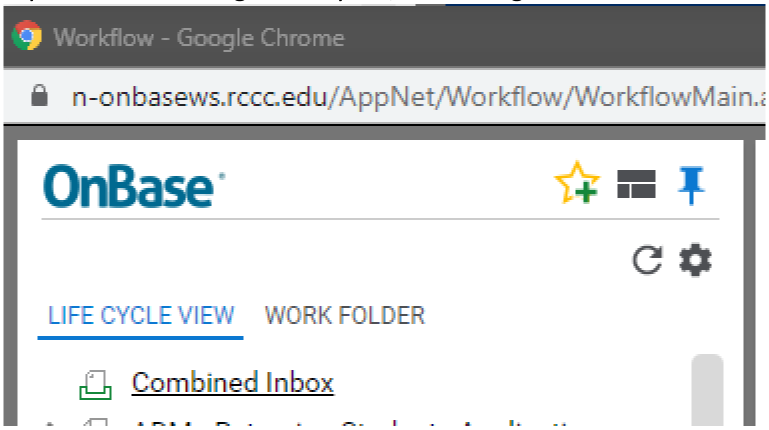
You can navigate between the “Home” and “Workflow” tab as needed to access other views for document retrieval and forms.

If you have access to a workflow, it will be displayed in the list on the left. Expand the desired workflow and select the queue you have items to review. If there are items to review, they should be displayed in the bottom left. As every workflow is different, knowing your workflow and process is key to understanding what to do once you have an item to review.

You can change the layout of the workflow window by selecting the “Change Layout” button in the top left. You can pick between simple or classic. These instructions assume you are using the classic layout. If you do not see the document after selecting it in the list, make sure the “Primary Viewer” is highlighted. “Primary Viewer” is located beside the “Change Layout” button.

Workflow functions similarly in the Web Client. To access Workflow in the Web Client, select the menu icon (three stacked lines in the top left corner) and select “Open Workflow”. A new window will open. From this point, it should follow the same steps as in the Unity Client.

If you need to change the layout, use the “grid” icon close to the top left. It is between the Star and Push Pin.



After you select a document to review, the document should display in the viewer. Also, the list of your queues should transition to the “Work Folder” View. If you want to select a different queue, you will need to select the “Life Cycle View” to see all of your queues again.