

OnBase Quick Reference Guide

Importing Documents – Unity Client

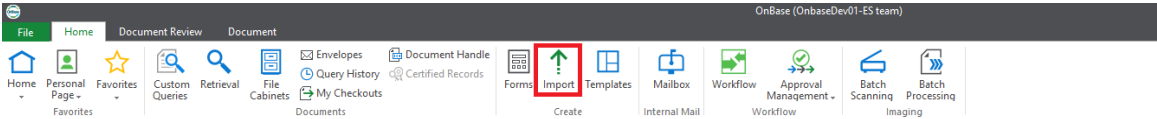
This guide offers instructions on how to import documents using the OnBase Unity Client. For instructions on how to import documents using the OnBase Web Client, see the [Importing Documents using the Web Client](#) Quick Reference Guide.

Electronic documents can be imported to OnBase using a number of methods including Batch Scanning, which can only be done using the OnBase Unity Client. For instructions on how to scan batches of documents or sweep multiple documents into OnBase from network directories, see the [Batch Scanning and Sweeping using Unity Client](#) Quick Reference Guide.

Importing Documents

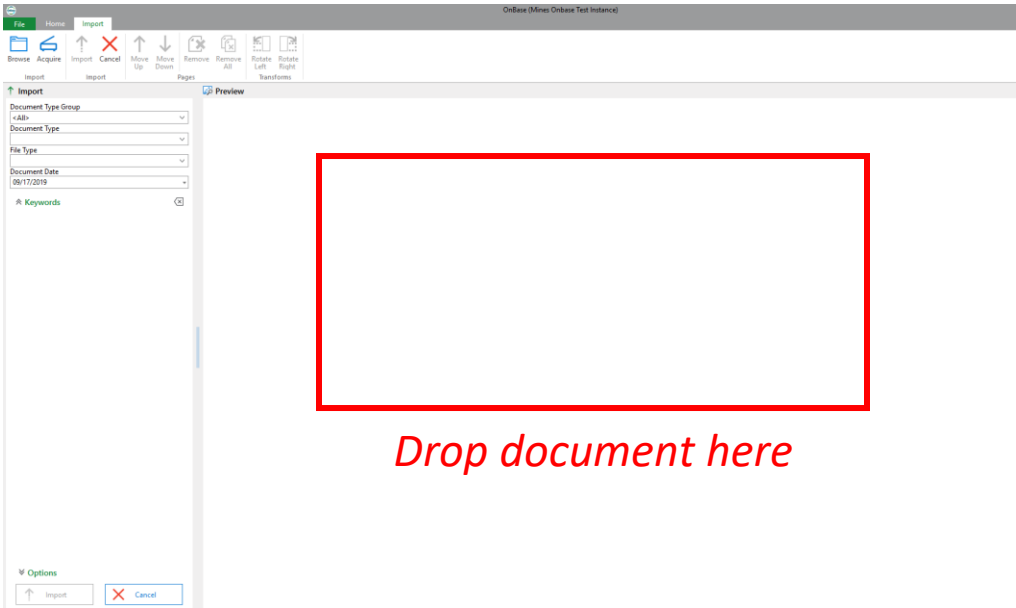
Perform the following steps to import a document using the OnBase Unity Client.

1. From the homepage toolbar (located at the top of the screen), click on the **Import** icon.



2. There are two methods of selecting a document:
 - a. *Drag and drop*

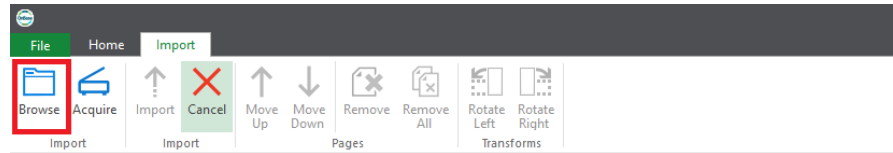
From the Import tab, drag and drop a document from your desktop into the Preview section of your screen



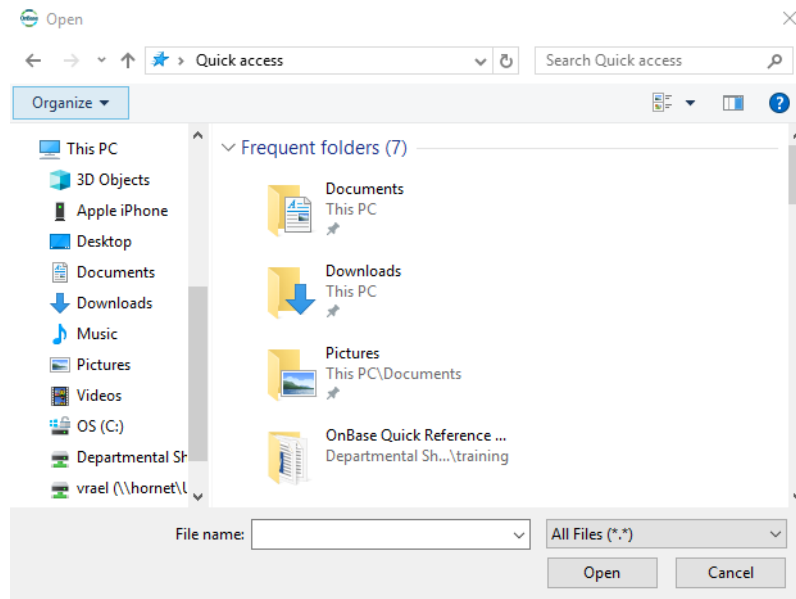
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b. *Browse* Icon

On the Import Tab toolbar, click **Browse**.

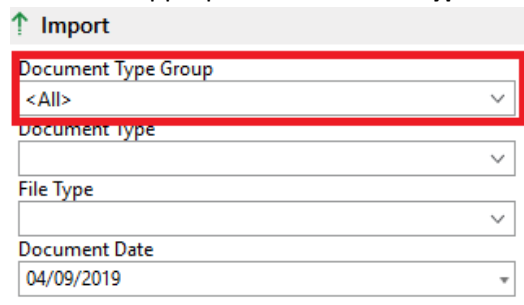


A popup window will appear. Select the document you want to upload and click *Open*.

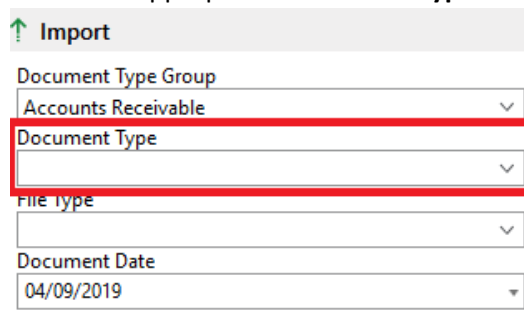


3. Under the Import section on the left-hand side of the screen, choose the following:

a. Select the appropriate **Document Type Group** from the drop-down list.



b. Select the appropriate **Document Type** from the drop-down list.



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- c. Do not change the **File Type**. The appropriate File Type will be filled automatically based on the file selected for import. Changing this setting may cause a corrupted import.

- d. Enter **Keyword** values.

After keying in the ID (or top index keyword) please hit the TAB key on your keyboard for OnBase to autofill keywords that are configured for this doc type.

⤴ **Keywords** ⤵

ID

PIDM

Last Name

First Name

Middle Name

Birth Date

Term Code

Student Record Exists

Level

Document Type

*Note: These values will be used to retrieve the document in a search. Fields labeled with **red text** are required keywords; the document cannot be indexed without these values.

4. Select **Options** as necessary near the bottom of the screen.

⤴ **Options**

Open Document After Import

Delete Files After Import

Hide Scanner Settings

5. Click the **Import** button at the bottom (or on the Import tab of the menu) to upload to OnBase.

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