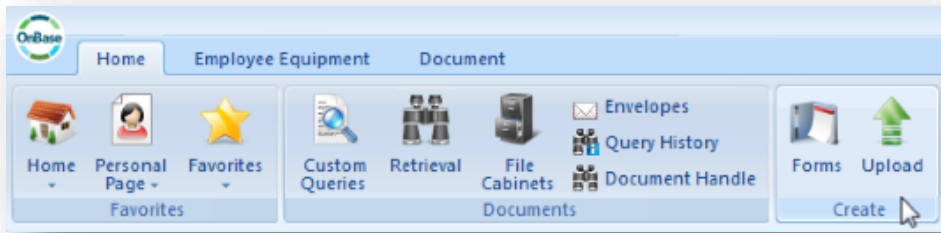
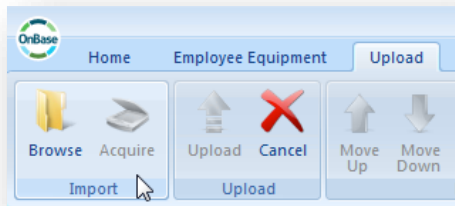


Import Documents to OnBase using the Unity Client

Go to the CREATE area of the Unity ribbon and click the **GREEN ARROW**.



This opens the Upload Tab, and displays the Upload Ribbon. At the far left are the **BROWSE** icon (a folder) and the **ACQUIRE** icon (a scanner).



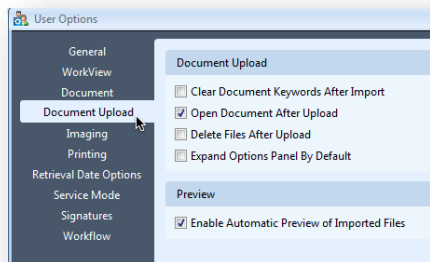
If importing from your computer, click **BROWSE** to open your file directory. Choose the document you want to upload and click **OPEN**, or drag and drop the file into the import preview window.

To scan, click the **ACQUIRE** icon. Choose the scanner driver (typically, it will have "Twain" in the name), and follow the scanner's directions from there.

Once the document is chosen or scanned, it will appear in the preview window. Choose the appropriate **Document Group** and the **Document Type**, and add the keywords, then click Upload.



Something to consider before you begin importing documents is whether you will be bringing in a number of documents that have many of the same keywords.



If so, you can set OnBase to keep the keywords in the fields after each upload. Then, each time you bring a document in, you only have to change those that are different. Conversely, if the documents are all different, you can set OnBase to clear the keywords after each upload. This setting is in **USER OPTIONS**. You can get to **User Options** by clicking the OnBase Logo at the top left, above the ribbon.

Another thing to note are the options above the **UPLOAD** and **CANCEL** buttons.

Open Document After Upload is handy if you intend to immediately email, add notes, split the document into several, add pages or modify the document in any way. The editing/modifying features apply to documents you import as images*.

Delete Files After Upload is a good option if you don't wish to keep the files on your computer.

*To upload PDFs, Word, Excel and other file types as images, please check out the Hyland Virtual Print Driver. Click [here](#) for more information!