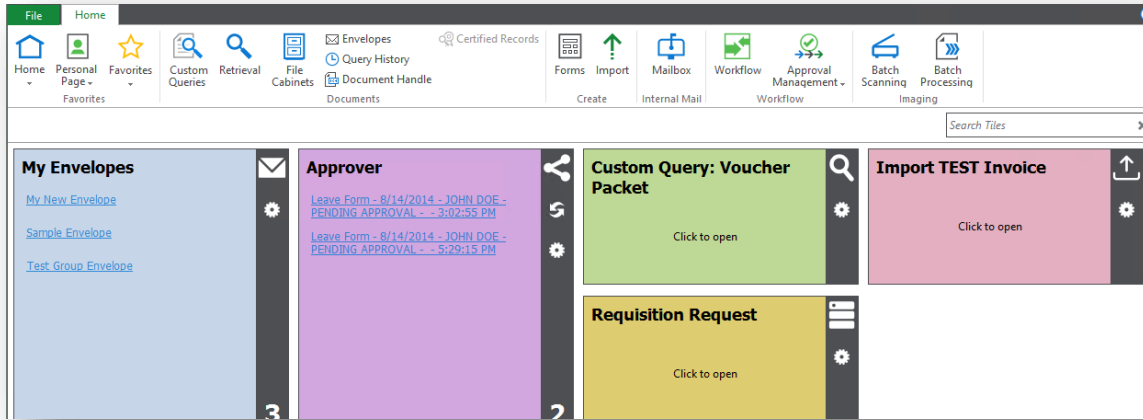


What is a Personal Page?

A Personal Page is a Unity interface that allows you to add portals to the areas in OnBase you frequent most.



You can create portals (referred to as Tiles in Unity) to:

- take you directly to a Custom Query
- take you to an upload window for a specific document type
- take you to a form that you complete often
- display the document hitlist in specific Workflow queues
- display and open your envelopes

This document will show you how to create portals and also how to set the Unity Client to open the Personal Page when you launch the program.

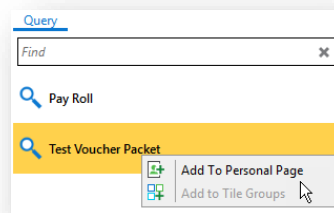
Custom Query

A custom query is a tool configured to search for predefined sets of documents. Examples include voucher packets, student cumulative records and employee files. (If you have questions about custom queries, please contact HCC.)

To create a portal to a specific custom query, open the Custom Queries panel.



Then highlight the name of the query, right click and choose Add To Personal Page.



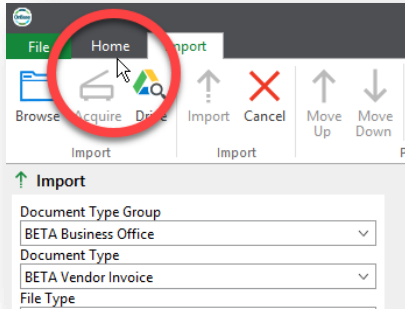
Upload/Import/Scan

If there are particular document types that you import frequently, you can create a portal to take you directly to the document type in the import panel.

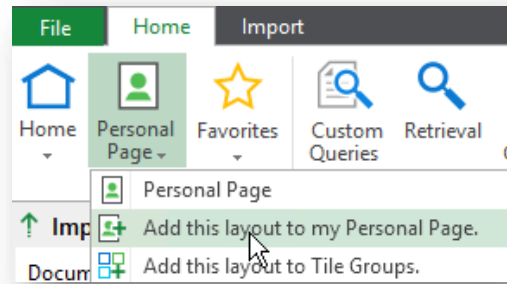
Open the import screen.



Pick the document type.
Then click the Home tab on the menu ribbon.



From the down arrow on the Personal Page icon, choose Add this layout to my Personal Page.



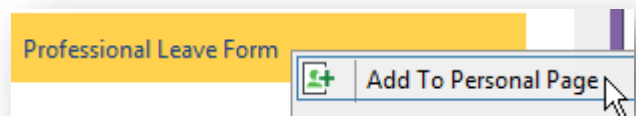
Forms

To create a portal for forms, open the Forms panel.



Forms

Then highlight the name of the form, right click and choose Add To Personal Page.



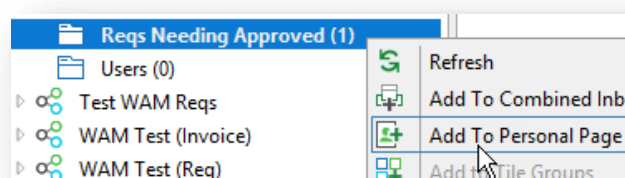
Workflow Queue

To create a portal to show documents in a workflow queue, open the Workflow panel.



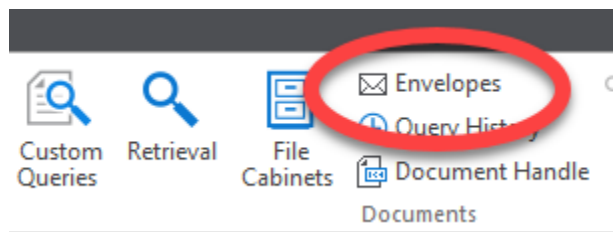
Workflow

Then highlight the name of the queue, right click and choose Add To Personal Page.



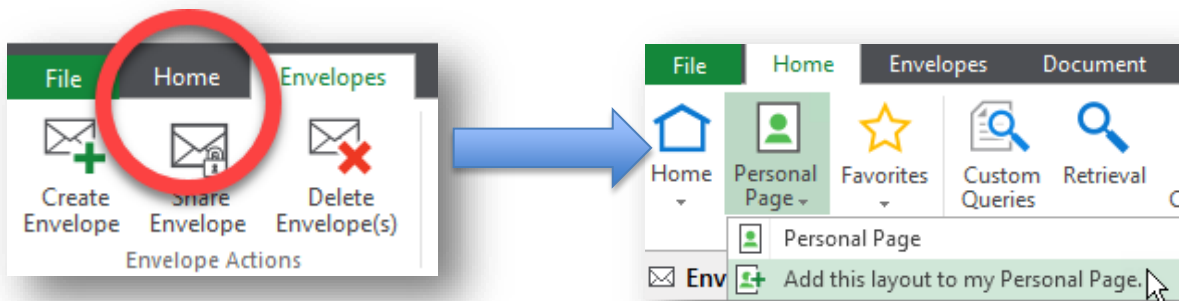
Envelopes

Open the envelopes window by clicking Envelopes icon, located in the Documents area of the main menu ribbon.

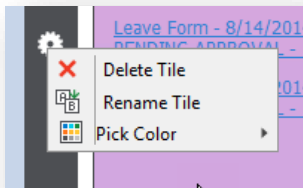


When the window opens, click the Home tab on the menu ribbon.

From the down arrow on the Personal Page icon, choose Add this layout to my Personal Page.



Customizing the Tiles



You change the name and color by clicking the cogwheel on the tile (either right click or a regular click gives you these options). You can also delete the tile with a right-click on the the cogwheel.

To rearrange the tiles on the page, just drag them where you want them. At this time, you cannot resize the tiles.

Setting the Unity Client to Open the Personal Page When Launched

Click the Personal Page icon to open the Personal Page. Then, click the down arrow on the **Home** icon. Choose Make this layout my Home Page. The next time you log into Unity, your Personal Page will open automatically.

