

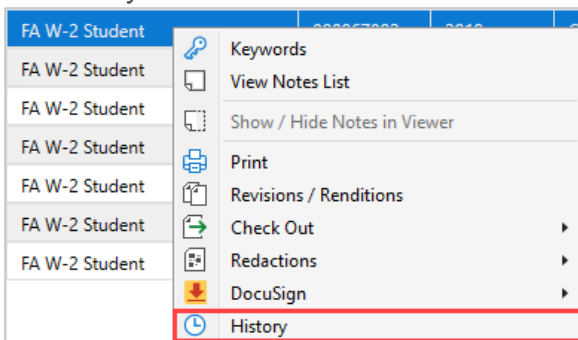
“Where is my Document?” in Unity Client

WHAT TO DO: Retrieve document using Document Retrieval or Custom Query.

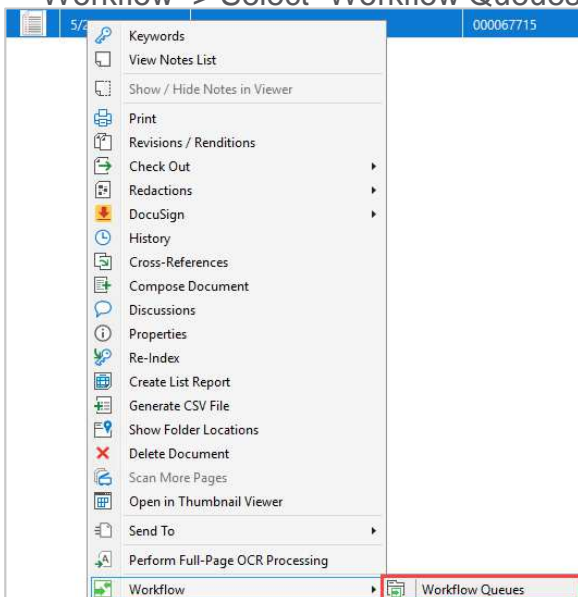
- **To find where it is in Workflow:**
 - Look at the ‘Workflow Queue’ column in a custom query

Document Type	ID	Award Year	Last Name	First Name	Workflow Queue
FA Verification Worksheet V1/V5	000067713	2019	LINCOLN	ABRAHAM	FA1 UNMATCHED CHECKLIST
FA W-2 Student	000067802	2019	COOLIDGE	CALVIN	FA1 HOLD FOR ADDITIONAL IFO
FA W-2 Student	000067805	2019	ARTHUR	CHESTER	FA1 DOCUMENT STATUS REVIEW
FA W-2 Student	000067825	2019	EISENHOWER	DWIGHT	FA1 HOLD FOR ADDITIONAL INFO
FA W-2 Student	000067921	2019	PIERCE	FRANKLIN	FA1 DOCUMENT STATUS REVIEW
FA W-2 Student	000068921	2019	WASHINGTON	GEORGE	FA1 DOCUMENT STATUS REVIEW
FA W-2 Student	000069371	2019	CLEVELAND	GROVER	FA1 DOCUMENT STATUS REVIEW
FA W-2 Student	1234538	2019	FORD	DOROTHY	FA1 ID EXCEPTIONS

- Look at the Document’s History
 Select Document > Right-click > Select “History”



- Look at the Workflow Queues window
 Select Document > Right-click > Select “Workflow” > Select “Workflow Queues”



“I Clicked the Wrong Thing. How do I undo This?” in Unity Client

WHAT TO DO: It depends...

- **CHECKLIST UPDATED FOR WRONG STUDENT:** You have to fix in the SIS manually. A user can resend the document through Workflow after correcting. If values were copied to Summary, the user will have to manually correct the values.
- **DOCUMENT IN WRONG WORKFLOW QUEUE:** It still depends. Some Ad-Hoc Tasks like “Return to Missing Items” let you correct keywords. Other Ad-Hoc Tasks have more complex actions behind them and are not easily undone.

“How do I Restore a Deleted Document?” in Unity Client

WHAT TO DO:

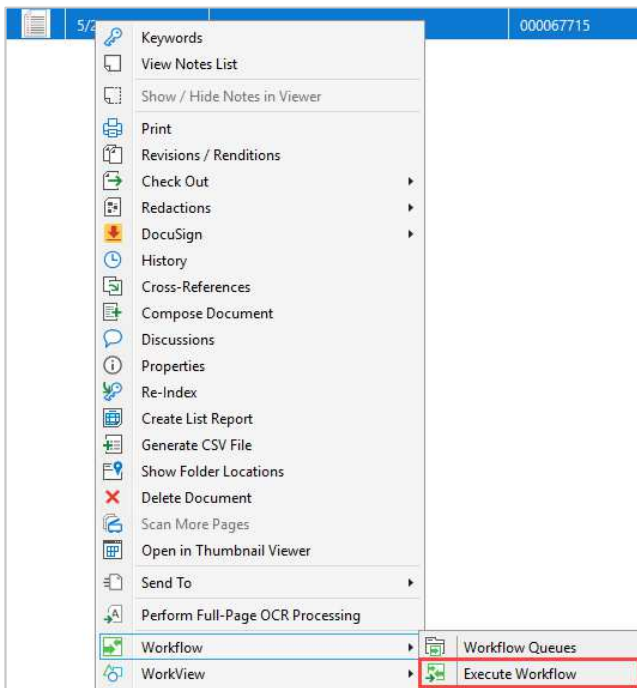
- Find a user who has access to OnBase Client with administrative privileges (typically your OnBase/System Administrator)
- The Administrator will restore your document from Document Maintenance if it has not purged. It will re-enter Workflow in whatever queue it was in before deletion.
- If the system or user purged the document, no one can restore the document and will have to be re-imported.

“My Document Left Workflow Early. How Do I send it Back into Workflow?” in Unity Client

WHAT TO DO: After a document leaves Workflow, it will remain archived in OnBase unless you manually delete it. It is possible to send the document back through Workflow after it has exited Workflow. Retrieve document using Document Retrieval or Custom Query.

• **To Execute Workflow:**

Select Document > Right-click > Select “Workflow” > Select “Execute Workflow”



This will add the document to the SYS Initial queue in the selected life cycle.

NOTE: If the Document Type is assigned to a lifecycle and the right configuration is enabled, re-indexing adds the document to Workflow. To add documents with incorrect keywords back to workflow, use “Re-Index”.

• **To Re-Index a Document:**

Select Document > Right-click > Select “Re-Index”

“I Clicked the Wrong Thing. How do I undo This?” in Unity Client

WHAT TO DO: It depends...

- **CHECKLIST UPDATED FOR WRONG STUDENT:** You have to fix in the SIS manually. A user can resend the document through Workflow after correcting. If values were copied to Summary, the user will have to manually correct the values.
- **DOCUMENT IN WRONG WORKFLOW QUEUE:** It still depends. Some Ad-Hoc Tasks like “Return to Missing Items” let you correct keywords. Other Ad-Hoc Tasks have more complex actions behind them and are not easily undone.
- **EXITED WORKFLOW PREMATURELY:** Send document into Workflow (execute WF or Re-Index)

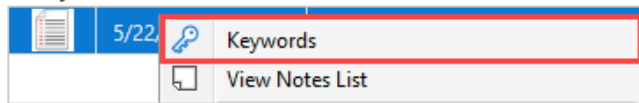
Modifying Keywords in Unity Client

For documents indexed with incorrect keyword values that are not in Workflow or that are in Workflow WITHOUT an Ad-Hoc Task to Re-Index, the document “Keywords” option should be used.

For documents outside of Workflow, retrieve the document using a Custom Query or Document Retrieval. For documents inside Workflow, navigate to the Workflow Queue.

To Modify Keywords:

Select Document > Right-click > Select “Keywords”



This will open a Document Information Panel to update Keyword values (for any keywords that are configured to be editable). Select “Save Keywords” when finished.

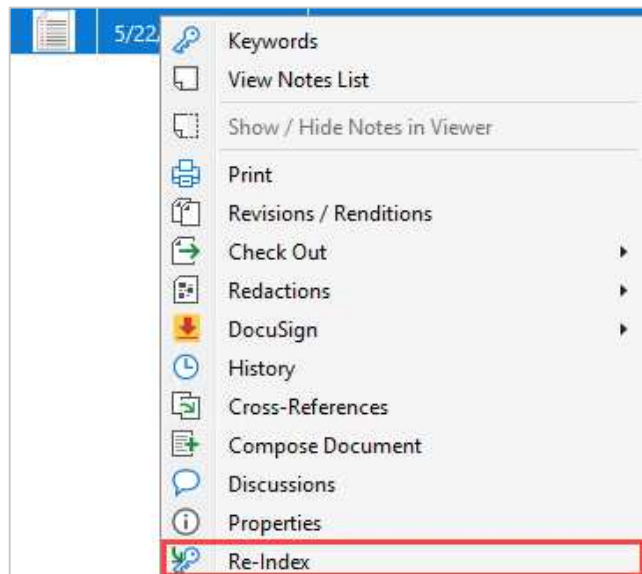
Re-Indexing in Unity Client

For documents indexed with incorrect keyword values AND an incorrect document type that are not in Workflow or that are in Workflow WITHOUT an Ad-Hoc Task to Re-Index, the document “Re-Index” option should be used.

Outside of Workflow, retrieve the document using a Custom Query or Document Retrieval. Inside Workflow, navigate to the Workflow Queue.

To Re-Index:

Select Document > Right-click > Select “Re-Index”



This will open a Re-Index Panel to update the Document Type and Keyword values (for any keywords that are configured to be editable). Select “Re-Index” when finished.

NOTE: If the Document Type is assigned to a lifecycle and the OnBase Configuration global Workflow Option of “Always Initiate Workflow on Reindex” is enabled, re-indexing adds the document to Workflow. To add documents with incorrect keywords back to workflow, use “Re-Index”.

Executing Re-Index & Re-Process Ad-Hoc Task in Unity Client

Generally, you should **not** use right-click options to Modify Keywords or Re-Index documents while working with them in Workflow.

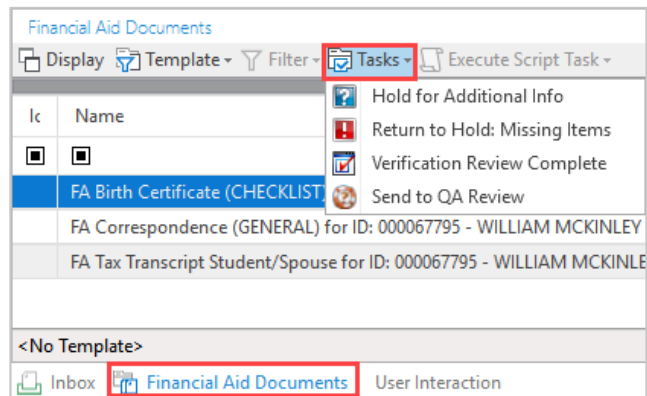
Instead, use the Ad Hoc tasks provided for these functions. Using Ad Hoc tasks will initiate additional processing beyond what the Keyword and Re-Indexing panels provide (e.g., sending a document back through Data Validation so that it can move to the next step of the process), as well as providing a clearer audit trail of interactions.



Executing Ad Hoc Tasks on Related Items in Unity Client

In certain cases, you may need to execute Ad Hoc tasks on the Related Items in Workflow rather than on the Primary Driving Document in the Workflow Inbox.

- Unity Client: Home > Workflow > Select the arrow next to the Lifecycle > Select the Lifecycle > Select Inbox Document > Select the Related Documents tab
- Select the Related Document > Select "Tasks" > Select the Ad-Hoc Task



NOTE: You should only use Ad Hoc tasks on Related Items if your Hyland Business Consultant has instructed you that it is acceptable to do so; some Ad Hoc tasks may contain functionality that should only be applied to Inbox items.