Logging In

There are multiple ways to log into OnBase:

- **Unity Client**: City PCs will already have the Unity Client installed. To login, open the Unity Client application on your desktop and provide your username and password. This will be the same thing you use to log into your email or PC.
- **Web Client**: You can also access documents in OnBase using the web client. A link to the web client can be found on the Employe Homepage. While we do not recommend using this client if you want to edit documents, it is a convenient way to access them while you are working remotely.

How to Login/Logout

Double click on the Unity Client shortcut on your desktop.

Enter your username and password and click Login. Your password should be the same as you use to log into Windows or Outlook email. If you are using a shared part-time account, your password will be provided.


When you close out of the OnBase application it continues to run in the background. If you use a shared computer, you can logout of the application by right-mouse clicking on the OnBase icon in the system tray and selecting log out. This will allow a different user to log in.
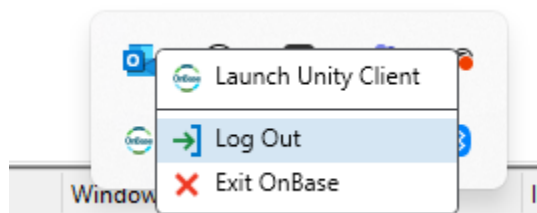
How to Use the Personal Page

One nice feature of OnBase is the ability to customize a personal page that gives you shortcuts to frequently used actions or documents. This personal page shows up as soon as you log into your Unity Client.
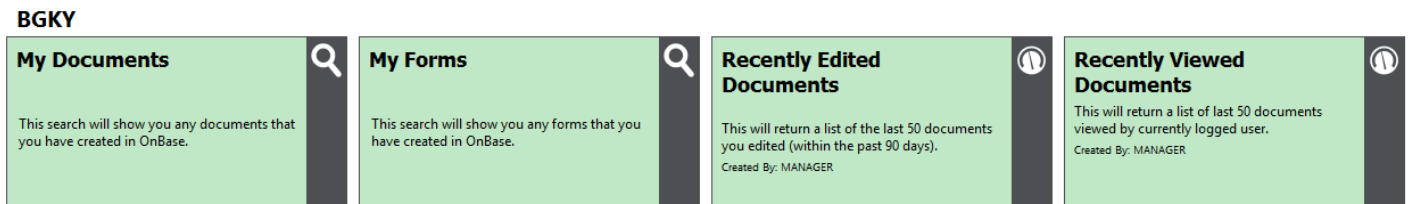
Be default, all employees have access to 4 tiles on their personal page:

- **My Documents**: This search will show you any documents that you have created in OnBase
- **My Forms**: This will show you any forms you have created in OnBase
- **Recently Edited Documents**: A list of the last 50 documents you have edited (within the past 90 days)
- **Recently Viewed Documents**: The last 50 documents you have viewed in OnBase

If you have any common documents, envelopes, custom queries or forms that you use you can add them to this page for quick access.

- **Documents**: To add one specific document to your personal page go to retrieval and search for the document, right-mouse click on the document in your search results and select Send To > My Personal Page.
- **Envelopes**: To add an envelope to your personal page, open the specific envelope. Select the Home tab so that you can see the Personal Page icon and select Add this layout to my Personal Page.
- **Custom Query**: The same method would apply to a form or custom query. Simply find the specific item, right-mouse click and select Add to Personal Page. You can add custom queries with specific data, such as a date range or keywords, to your Personal Page. This will add the exact search you just performed to your personal page. This is useful if you run the same type of search multiple times.

Customizing your Personal Page

After adding items on your personal page, you can customize the page to fit your needs. Tiles can be moved around by clicking and dragging them to a new location. To delete a tile from your personal page right-mouse click and select Delete Tile.

You can click on the configure icon of a tile to make changes to the name, description, or color of a tile.

The icons on the top right of a tile let you know what type of item it is. Some but not all examples are below:

- Document
- Custom Query
- Dashboard
- Filing Cabinet
- Envelope

How to Change User Options

There are several different user options available to change the behavior of the unity client to meet your preferences. Click on File > User Options to see the different options. Click through the different categories on the left-hand side to view the different options on the right-hand side.