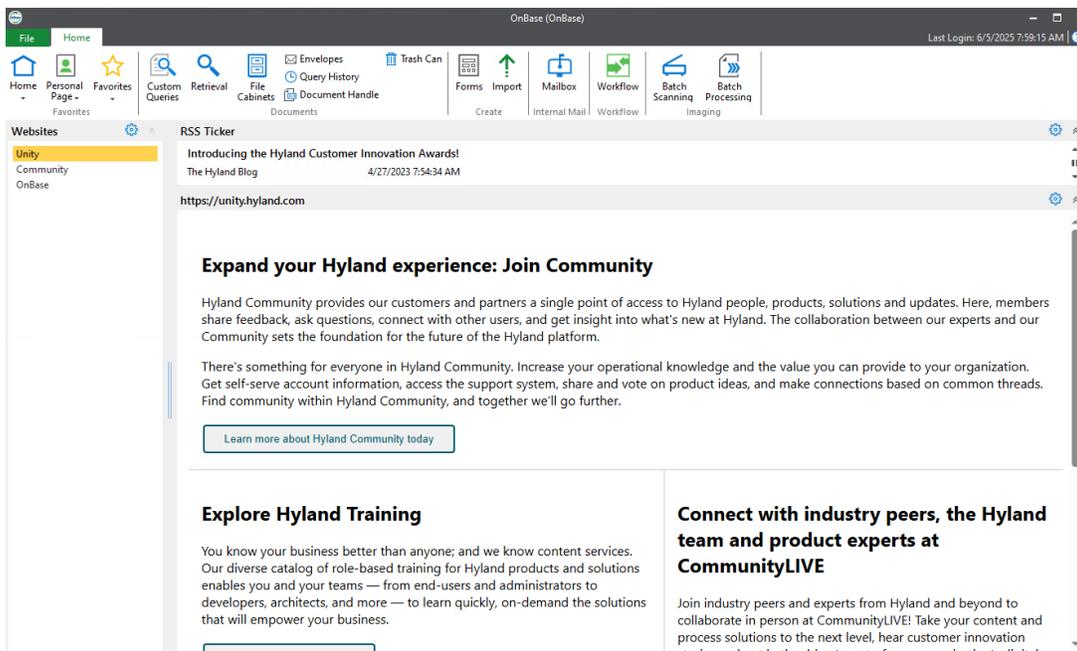


I was informed that I'll be using OnBase Unity Client to review and approve Agreement/Contract Transmittal Forms (aka the CTF Process). What do I need to know?

You need to install the Unity Client on your workstation, and if you have more than one workstation that connects to the RCCD network you should install it on those as well. There is an email with instructions on how to install Unity Client—in short it is available on the Company Portal and is called RCCD – OnBase Unity Client 22-Prod.

Once installed, you should open the Unity Client at least once and make sure you are automatically logged in. If not, let IT know immediately.

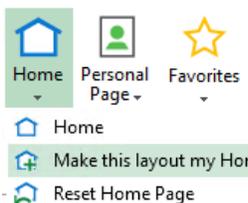
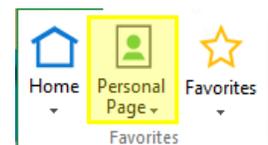
Upon opening Unity Client the first time you'll see a screen like this:



This first window you see when opening Unity is called the **Home** screen.

You should change the default **Home** screen to your **Personal Page**.

Click on the button in the ribbon that says **Personal Page**.



Then click the small down arrow under the button that says **Home** and select *Make this layout my Home Page*.

Your Personal Page will contain some boxes that provide shortcuts to different areas of OnBase you might need. These

boxes are called Tiles. A set of Tiles has been created for you based on your User Group. You can also add your own tiles over time as you start using OnBase more and more.

After this first interaction with Unity Client, you can close it.

For the CTF Process you will generally receive an email with an attachment when you have a form to review and approve. Opening that attachment will launch Unity for you and bring you right to the form and the tools you'll need to work with.