Creating a New Document from an Existing Document in Unity 12

Unity 12 allows users with appropriate permissions to create new documents from existing documents either by using the document thumbnails or the Send To menu button.

Creating a New Document using Thumbnails

- Log into the OnBase Unity client
- Retrieve and open a document.
- Select thumbnails for the new document.
- Right click and select Send To | Create New Document

- Index the new document. Select the checkbox to Delete copied pages if removing from the original. Select OK.
Creating a New Document using Send To Button

- Retrieve and open a document.
- Select thumbnails for the new document.
- From the Document tab select Send | Create New Document

- Index the new document. Select the checkbox to Delete copied pages if removing from the original. Select OK.