Document Imaging for the Unity Client

Batch Scanning & Indexing — OnBase 16 SP 1 Quick Reference Guide

## Getting Started

1. To avoid an error, **Install the Unity Client** by copying and pasting the following URL into Internet Explorer or Edge. https://dm-clickonce.prod.cu.edu/UnityClient/UnityClientDMOPRD.application.
2. Launch the client and enter your OnBase user name and password. If multiple data sources are available, you must also select the appropriate data source from the drop-down list.
3. Click **Login**. Once the Application Server you are connecting to is finished initializing, the Unity Client window is displayed.
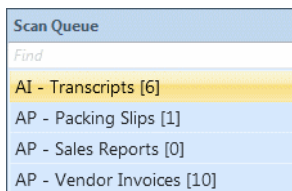
Accessing the Batch Scanning Layout

1. From the Unity Client window, click the **Batch Scanning** button in the **Imaging** ribbon group.
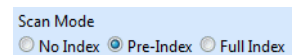2. The **Batch Scanning** layout's primary view is displayed.
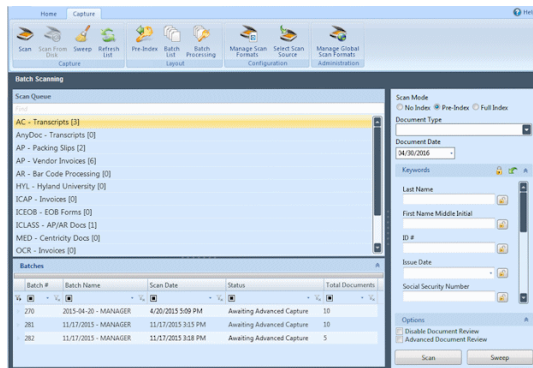
Scanning a Batch

1. From the list of available scan queues on the left, select the scan queue you would like to use to scan the batch.


2. Specify the scan mode of the batch to be scanned:

   - **No Index:** No default Document Type or Keyword data is manually assigned to the documents before they are scanned. After scanning, the batch is routed for manual indexing.
   - **Pre-Index:** Default Document Type and Keyword data are specified before scanning. After scanning, the batch is routed for additional manual indexing.
   - **Full Index:** Default Document Type and Keyword data are specified before scanning. After scanning, batches are treated as fully indexed and are not routed for manual indexing.

Scanning a Batch (continued)

3. If you are scanning in **Pre-Index** or **Full Index** mode, select a Document Type from the drop-down list and enter any desired Keyword Values.
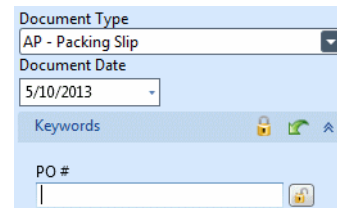

4. Load pages in the scanner and click the **Scan** button.
5. If prompted, enter a name for the batch, select a scan format, and click **Scan**.
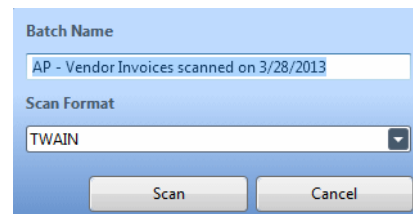
6. If the scanner's interface is displayed, modify scanner options as desired and click **Scan**.
7. When scanning is complete, the **Scanning complete** dialog box is displayed.
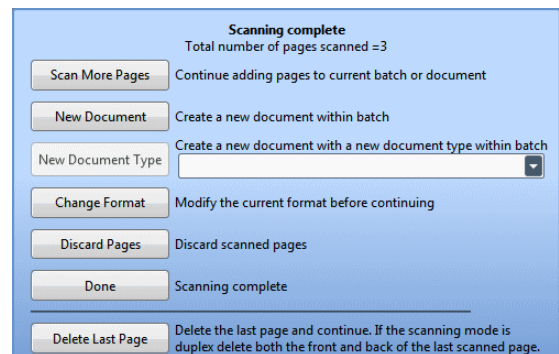
8. Select the next desired action (e.g,. scan more pages, scan a new document, delete, etc.). When you are done scanning, the batch is automatically routed to the next configured batch status queue, and you are taken to the **Batch Scanning** layout's secondary view.
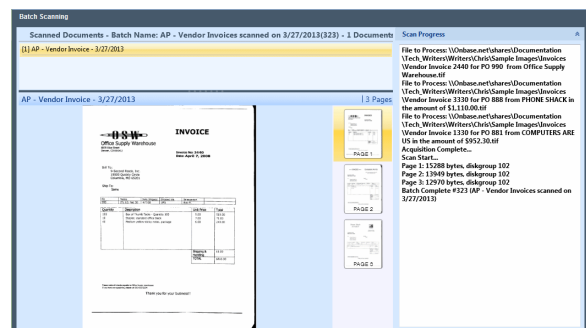

9. After reviewing the documents in the batch, click **Back** in the **Actions** ribbon (on the **Document Review** tab) to return to the primary view.

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Accessing the Batch Indexing Layout

1. From the Unity Client window, click the **Batch Processing** button in the **Imaging** ribbon group.
2. The **Batch Processing** layout is displayed.
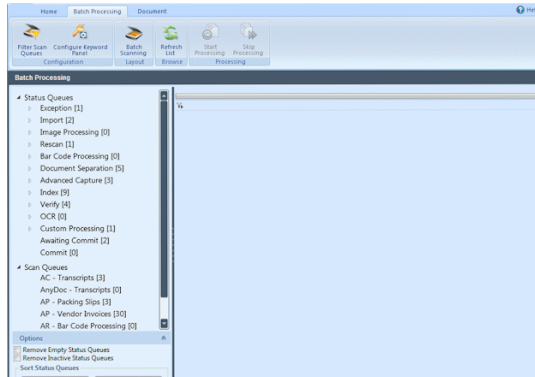
3. View the batch(es) you wish to index in one of the following ways:

   - From the **Scan Queues** list in the lower-left corner, select a scan queue to display all batches associated with it.
   - From the **Status Queues** list in the upper-left corner, select a document action grouping to display all associated batch status queues residing in the queue.
   - From the **Status Queues** list in the upper-left corner, select a batch status queue to display all batches residing in the queue.
4. Select the batch(es) to be indexed, right-click, and select **Index Documents**. The **Batch Indexing** layout is displayed, with the **Indexing** pane in the upper-left corner, the **Documents** pane in the lower-left corner, and the first unindexed document in the **Document Viewer** on the right.
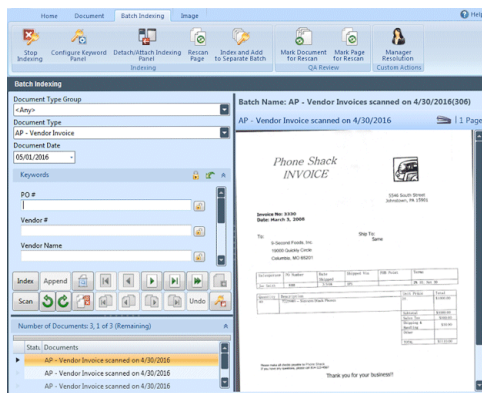

Indexing a Batch

1. From the **Batch Indexing** layout, to navigate among the documents in the batch, either select a document from the **Documents** pane or use the navigation buttons in the **Indexing** pane.
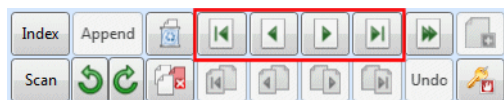
Indexing a Batch (continued)

2. Select a Document Type from the drop-down list and enter any desired Keyword Values.
3. When you are finished entering Keyword Values for the current document, click the **Index** button. The document is marked as indexed, with a check mark next to it in the **Documents** pane.
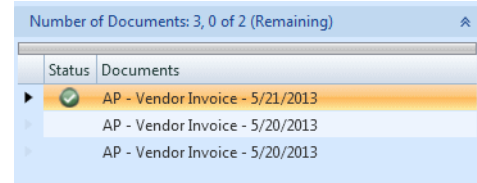
4. The next unindexed document in the batch is displayed in the **Document Viewer**. Do one of the following:

   - To index the document, repeat steps 2-3.
   - To skip the document, click the **Skip Document** button. The document is removed from the **Documents** pane, though it remains in the batch.
   - To append the document to the previously indexed document, click the **Append** button. The document is removed from the **Documents** pane, now a part of the previously indexed document.
   - To delete the document, click the **Delete Document** button. The document is removed from the **Documents** pane and deleted from the batch.
5. Once all documents in the batch have been indexed, the batch is routed to the next configured batch status queue.

Shortcut Key	Indexing Action
Alt+D	Shifts focus to the Document Date.
Alt+X / Alt+I	Indexes the document.
Alt+P	Appends the current document to the previously indexed document.
Alt+S	Scans additional pages into the current batch.
Alt+Y	Clears Keyword Values.
Alt+G	Deletes the page.
Alt+C	Deletes the document.
Alt+K	Skips the document during indexing.
Alt+R	Creates a new document from one or more pages of a multi-page document.
Alt+U	Undoes the previous indexing action.
Alt+Q	Stops indexing.
F6	Duplicates Keyword Type field.
Tab	• When the focus is set to a Keyword Type field containing a primary value of an AutoFill Keyword Set, triggers the AutoFill. • When the focus is not set to Keyword Type field containing a primary value of an AutoFill Keyword Set, highlights the next available Keyword Value.

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