## OnBase Quick Reference Guide **Scanning Documents**

This Quick Reference Guide covers setting up the scan station and using a scanner to import batches of documents into OnBase using the Unity client installed on a Windows PC. Departments are generally licensed for one to two scanners per group. To install the Unity client, refer to the <u>OnBase Web URLs and Unity Client ClickOnce URLs</u>.

Batch Indexing is covered in separate guides (<u>Indexing documents – Unity Client</u> and <u>Indexing documents – Web Client</u>).

## **Configuring your Scan Station**

Perform these steps to configure your scan station. Not all users will have access to make these changes; contact your <u>departmental administrator</u> or <u>UIS</u> for assistance if necessary. You should only have to perform these steps once for each scan station.

1. Login into the Unity Client with your campus credentials.

First, select your campus. Depending on the size of the window, you may see campus names only or the campus names along with pictures. Single click on campus names or double click if the picture is displayed.



Single click to select the desired campus.





Double click to select the desired campus.

2. Enter your campus credentials. For assistance with your campus credentials, refer to the links on the login page for your campus. Go to the **File** menu and select **User Options**.

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File				
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OnBase	OnBase Community	2	Personal Page	
~	Troubleshooting +			5
<b>6</b>	Applications			-
<u>8</u>	User Options			
*	Administration 🕨			

3. Select **Imaging** from the list at the left of the User Options window.



4. Select Production Document Imaging (KOFAX or TWAIN) and click Save.



2	User Options —		×			
General WorkView	License Option		<u>^</u>			
Document Document Import Imaging Local Data Printing Retrieval Date Options Revision Control Service Mode Signatures Workflow	Use the following license on this workstation to enable batch scanning					
	Batch Processing         ☐ Hide batch counts         ☐ Hide sub status queues         ☐ Hide document counts         ☐ Automatically select Auto Load Next Batch         ☑ Display batch locks         Batch Indexing					
	Enable the review actions warning		$\sim$			
	Save Can	cel				

5. Click **Batch Scanning** on the Home tab of the menu

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File	Home	ltem <sup>1</sup>	/iewer											
Home	Personal Page +	Favorites	Custom Queries	Q Retrieval	File Cabinets		📴 Document Handle ्रि Certified Records	1 Import	Templates	Reporting	Mailbox	Workflow	Batch Scanning	Batch Processing
	Favorites					Documents		Create	2	Reporting	Internal Mail	Workflow	lma	iging

6. Click the gear icon for **Manage Scan Formats** on the Batch Scanning tab of the menu.



7. Click **New** to create a new scan format.



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	Manage Scan F	ormats
All Favor	ites	New
		Delete
		Scanner Setup
		Document Setup
		Import Formats
		Export Formats
	ОК	Close

8. Type a name for your new scan format and select the Source Type.

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-1	Scanner Setup
at	Document Setup
	v
	Import Formats
ОК	Cancel
	at OK

9. Choose your scanner from the available scanners list and click OK.

10. If needed, refer to the appropriate guide in the Scanning/Sweeping section of the <u>OnBase Training</u> page for instructions on setting up your scanner's profile.

## **Scanning Documents**

Now that your scanner is configured, you are ready to scan your documents. Perform these steps to scan into OnBase.



- 1. Open the Unity client and log in.
- 2. Click **Batch Scanning** on the Home tab of the menu



3. Choose the appropriate scan queue for the documents being scanned. You can use the search bar at the top of the list to help find the desired scan queue.

File Home	Capture								?
Scan Scan From Disk	List	Batch Processing Layout	Scan Source Scan Format	Configuration	~ ~ 袋	Manage Global Scan Formats Administration			
Batch Scanning									
Scan Queue test S - ES - Testing S S - UIS - Testing			_		*	Scan Mode No Index O Pre-Inde Document Type Document Date Em	x O Full Index		~
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Batches					*				
Batch #	Batc	h Name						7	
<					>	Scan	Sweep		

4. Choose one of the following scan modes.

Scan Mode No Index O Pre-Index O Full Index Document Type				
	$\sim$			
Document Date				
<b>v</b>				

a. **No index:** All document type selection and keyword value indexing will occur in Batch Processing after the batch is scanned.



- b. **Pre-index:** The document type will be selected prior to scanning the batch. Keyword values can be entered as well, but the batch will still require additional indexing for other keyword values.
- c. **Full Index:** The document type and all keyword values will be entered prior to scanning the batch. The batch will bypass the initial indexing status queue and will move straight to the *Awaiting Commit* status if no other indexing is required.
- 5. Click **Scan** in the lower right-hand panel or on the Capture tab of the menu.

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File	Home	Ca	pture								0
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	Disk		List	Processing	L			Scan Formats			
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Scan C	lueue						*	Scan Mode			
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	- Testing						_	Document Type			~
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<							>	Scan	Sweep		

6. Enter a name for your batch (if prompted, some scan queues will create the name automatically) and select your scan format.



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ľ	Batch Name				
	3rd Party Batch Batch # created on 10/11/2018 by Larissa				
	Scan Format				
	SFS - Barcode Separation - Color 🛛 🗸				
	Scan Cancel				

7. At this time, make sure the documents have been placed into the scanner's feeder tray and are ready for scanning (staples, paper clips and sticky notes removed). Then click **Scan**.

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Batch Name						
3rd Party Batch Batch # created on 10/11/2018 by Larissa						
Scan Fo	rmat					
SFS - Barcode Separation - Color 🛛 🗸						
	Scan Cancel					

8. When all pages have been scanned, you will be prompted with the following options. Most of the time "Done" should be used.



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		Scanning complete Total number of pages scanned =6
	Scan More Pages	Continue adding pages to current batch or document
	New Document	Create a new document within batch
	New Document Type	Create a new document with a new document type within batch
	Change Format	Modify the current format before continuing
	Discard Pages	Discard scanned pages
	Done	Scanning complete
	Delete Last Image	Delete the last image (back of the last page) and continue
	Delete Last Page	Delete the last page and continue. If the scanning mode is duplex delete both the front and back of the last scanned page.
	Delete Last Document	Delete the last document and continue

9. At this time, you can review pages and make any necessary changes. If Advanced Document Review is enabled in User Options, that will be displayed at this time. When you are ready to send the batch to indexing, click **Back** to go back to Batch Scanning to scan another batch or **Go to Batch** to go to Batch Processing and begin indexing.

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File Home Document Review Document Im-	age
	tate Rotate Rotate fright 180° Orientation
Batch Scanning	
Scanned Documents - Batch Name: Cash Receipts	created on 9/27/2017 by ARMA000017(141137) - 5 Documents
[1] Cash Receipt for 9/27/2017	
[1] Cash Receipt for 9/27/2017	
[1] Cash Receipt for 9/27/2017	
Cash Receipt for 9/27/2017	1 <sup>Page</sup>
University of Colorado	Effective Date: 01/01/2015

## **Sweeping Documents**

In addition to scanning paper copies, OnBase also allows for documents that already exist electronically to be imported as batches from a folder on your computer or network. Perform these steps to sweep into OnBase.



- 1. Open the Unity client and log in.
- 2. Click **Batch Scanning** on the Home tab of the menu



3. Choose the appropriate scan queue for the documents being scanned. You can use the search bar at the top of the list to help find the desired scan queue.

File Home Capture				?
Scan Scan From Sweep Refresh Disk Capture Capture	Scan Source Scan Format Configuration	→ 🍪 Manage Scan For Administ		
Batch Scanning				
Scan Queue test S - ES - Testing Scan Queue [0] S - UIS - Testing Scan Queue (IDC) [0]		Scan Moc	dex () Pre-Index () Full Index nt Type	~
		≮ Keyw	vords	<b>a</b> ×
Batches		*		
Batch #         Batch Name           ■         ~ T <sub>X</sub> ■				
<		>	Scan Sweep	

4. Choose one of the following scan modes.

Scan Mode No Index O Pre-Index O Full Index Document Type						
		$\sim$				
Document Date						

a. **No index:** All document type selection and keyword value indexing will occur in Batch Processing after the batch is scanned.



- b. **Pre-index:** The document type will be selected prior to scanning the batch. Keyword values can be entered as well, but the batch will still require additional indexing for other keyword values.
- c. **Full Index:** The document type and all keyword values will be entered prior to scanning the batch. The batch will bypass the initial indexing status queue and will move straight to the *Awaiting Commit* status if no other indexing is required.
- 5. Click **Sweep** in the lower right-hand panel or on the Capture tab of the menu.

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File Home Capture Capture Scan Scan From Sweep Refresh Disk Capture Batch Scanning	Batch Processing Layout	∨ ∨ ©	Manage Global Scan Formats Administration	0
Scan Queue test S - ES - Testing Scan Queue [0] S - UIS - Testing Scan Queue (IDC	C) [0]	*	Scan Mode No Index O Pre-Index O Full Index Document Type	~
			Document Date	<u>a</u> x
Batches Batch # Batch 1	Name	*		
<ul> <li>T<sub>X</sub></li> <li></li> </ul>		>	Scan	ep

6. Choose whether you would like to sweep all files in a folder, or just one file.



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Which method do you wish to use to sweep files?							
0	Sweep all files in a particular directory						
Ø	Import one file						
0	Cancel						

• To sweep all files in a folder, click the browse button at the right and navigate to the desired folder. Make any optional selections, then click **Sweep**.

9	×					
Sweep Directory						
Delete Files After Sweep						
Sweep Images Only						
Image Orientation No Rotation	Flip Vertically					
O Rotate Left 90 degrees	Flip Horizontally					
O Rotate Right 90 degrees						
O Rotate 180 degrees						
Sweep	Cancel					

• If you choose to sweep only one file, a file browser window will open. Navigate to the desired document and click **Open**.

7. At this time, you can review pages and make any necessary changes. If Advanced Document Review is enabled in User Options, that will be displayed at this time. When you are ready to send the batch to indexing, click **Back** to go back to Batch Scanning to scan another batch or **Go to Batch** to go to Batch Processing and begin indexing.



OnBase (DMODEV)											
File	Home	Document Review	Docur	ment	lmage						
<b>€</b> Back	Go to Batch Previo Page		Add Page(s) Pages	Delete Page	Rotate Left	Rotate Right rrientation	Rotate 180°				
Batch	Scanning										
S	anned Docu	ments - Batch N	ame: Casl	h Receij	ots crea	ited on	9/27/2	017 by ARMA000017(141137) - 5 Documents		(	9
[1] C	ash Receipt for	9/27/2017								~	
[1] C	ash Receipt for	9/27/2017									
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