

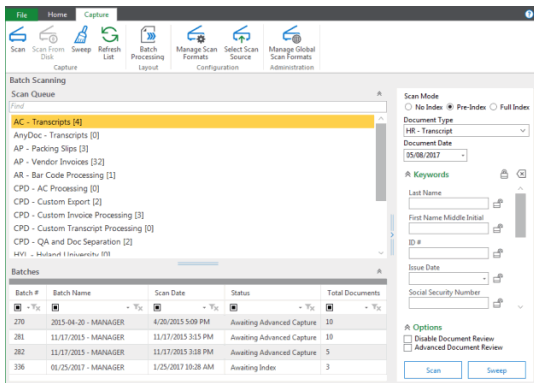
Getting Started

1. To launch the Unity Client, double-click the **Unity Client** icon on the workstation's desktop. The login dialog box is displayed.
2. 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.

Note: The Application Server you are connecting to may take a few minutes to initialize.

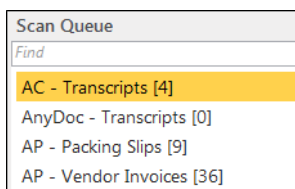
Accessing the Batch Scanning Layout

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.

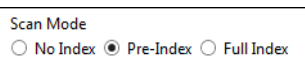


Scanning a Batch

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



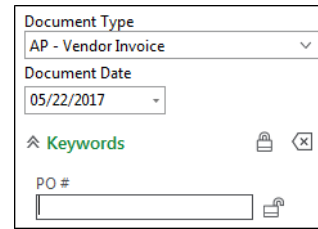
2. Specify the scan mode of the batch to be scanned:



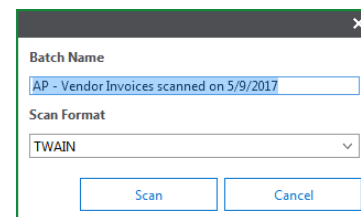
- **No Index:** No default Document Type or Keyword data is manually assigned to the documents before they are scanned. After scanning, the batch is routed for manual indexing.
- **Pre-Index:** Default Document Type and Keyword data are specified before scanning. After scanning, the batch is routed for 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)

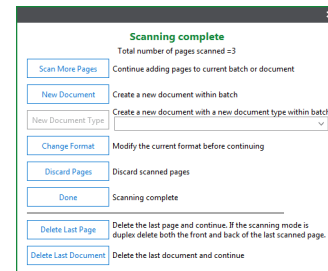
3. If you are scanning in **Pre-Index** or **Full Index** mode, select a Document Type from the drop-down list and enter any desired Keyword Values.



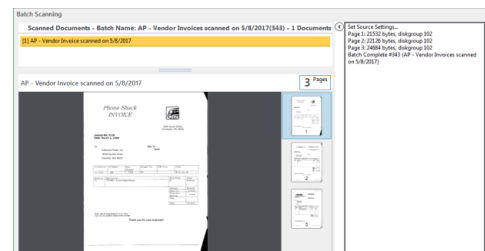
4. Load pages in the scanner and click the **Scan** button.
5. If prompted, enter a name for the batch, select a scan format, and click **Scan**.



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.



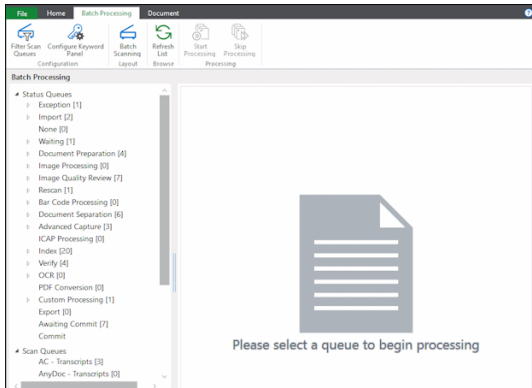
8. Select the next desired action (e.g., scan more pages, scan a new document, delete, etc.). When you are done scanning, the batch is automatically routed to the next configured batch status queue, and you are taken to the **Batch Scanning** layout's secondary view.



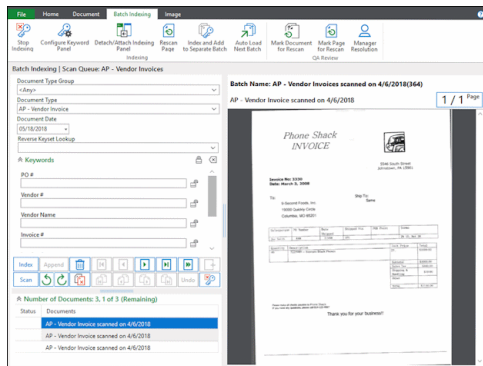
9. After reviewing the documents in the batch, click **Back** in the **Actions** ribbon (on the **Document Review** tab) to return to the primary view.

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.



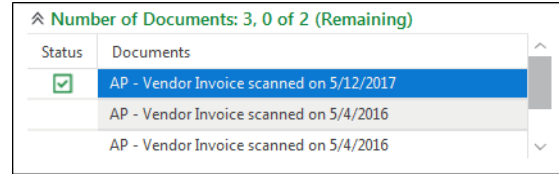
Indexing a Batch

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	<ul style="list-style-type: none"> • 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.

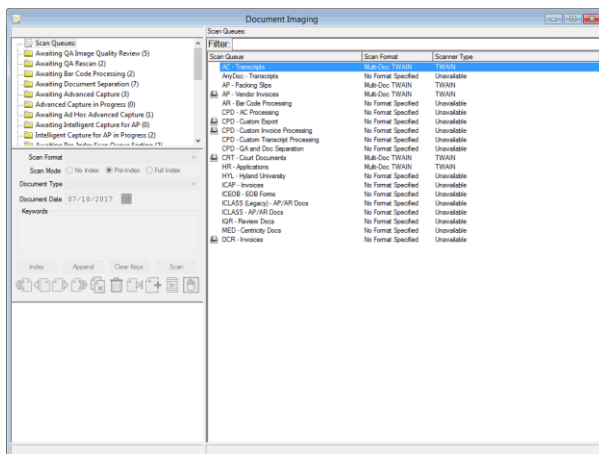
Document Preparation

Ensure that all documents are prepared and batched for scanning according to your Advanced Capture solution's requirements. For a complete list of recommended document preparation procedures, see the **Preparing Documents for Scanning** document.

Scanning a Batch

Note: The following procedures should be performed by scan machine operators. For the batch to be routed as described, the scan queue to which the batch belongs must be configured for Advanced Capture. For more information on Advanced Capture configuration and procedures, see the **Advanced Capture** module reference guide.

1. Log in to the OnBase Client.
2. Click **Processing | Scan/Index**. The **Document Imaging** window is displayed.



3. From the Queue List window in the upper-left corner, select **Scan Queues**. All scan queues available to you are displayed in the Working window on the right.
4. Double-click the appropriate scan queue.
5. Load a batch of documents into the scanner, ensuring that the pages are positioned properly for scanning.
6. In the Indexing window on the left (below the Queue List window), do the following:
 - From the **Scan Format** drop-down list, select an appropriate scan format for the batch.
 - In the **Scan Mode** section, select **Pre-Index**.
 - From the **Document Type** drop-down list, select an appropriate Document Type (or simply verify the default).
 - Click **Scan**.
7. If prompted for a batch name, enter an appropriate name in the **Batch Name** dialog box and click **OK**.
8. When scanning is complete, the **Scanning Complete** dialog box is displayed.
9. Click **Done**. The batch is routed to the **Awaiting Advanced Capture** batch status queue.

Performing Advanced Capture

Note: The following procedures should be performed by indexing personnel with rights to perform Advanced Capture processing. If your solution is configured to perform Advanced Capture processing automatically, proceed to the **Index Verification** section below.

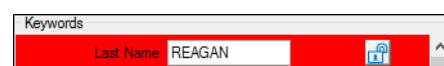
1. From the Queue List window, select the **Awaiting Advanced Capture** batch status queue. All batches residing in the queue are displayed in the Working window on the right.
2. Select the appropriate batch, right-click, and select **Perform Advanced Capture Processing**. A confirmation message is displayed.
3. Click **OK**. Advanced Capture processing is performed. If any processed values are marked as suspect, the batch is routed to either the **Awaiting Index** or **Index in Progress** batch status queue for index verification.


Index Verification

Note: The following procedures should be performed by index verification personnel.

1. From the Queue List window, select the **Awaiting Index** or **Index in Progress** batch status queue. All batches residing in the queue are displayed in the Working window on the right.
2. Select the appropriate batch, right-click, and select **Index Documents**. The first document in the batch is displayed in the Working window.
3. In the Indexing window on the left (below the Queue List window), the Keyword Type fields are displayed. Verify that all indexing information captured via the Advanced Capture process is correct.

Note: If a captured Keyword Value is marked as suspect, its Keyword Type field is highlighted in red by default. Depending on your configuration, some Keyword Type fields may be highlighted in a different color.



4. Enter any remaining values for the Keyword Types that require manual entry as defined by your Advanced Capture solution.
 - To ensure that a Keyword Value is carried over to the next document in the batch, click the lock button to the right of the Keyword Type field.
 
 - To add an additional line for a Keyword Type field or a new line for a Keyword Type Group, select the field and press **F6**.
5. To delete any invalid Keyword Values, highlight the value and press **Delete** or **Backspace**.
6. To delete an invalid itemized line from a Multi-Instance Keyword Type Group, select the Keyword Type field of the itemized line and press **Ctrl+Delete**.
7. Once you have corrected and entered all appropriate Keyword Values, click **Index**. The next document in the batch is displayed in the Working window.

Index Verification (cont.)

8. Repeat steps 3 to 7 for each document in the batch. To combine a displayed document with the previous document, click **Append**.
9. Once all documents in the batch have been indexed, the batch is automatically routed to the next configured batch status queue for the scan queue.