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.

Batch Scanning	Capture	-Index Batch Batch List Processing Layout	Manage Scan Select Scan Formats Source Configuration	Manage Global Scan Formats Administration	
	0				
Scan Queue Find AC - Transcrip AnyDoc - Tran AP - Packing : AP - Vendor I AR - Bar Codé HYL - Hyland ICAP - Invoice ICEO8 - EOB ICLASS - AP/A MED - Centric OCR - Invoice	nscripts [0] Slips [2] Invoices (6] Processing [0] University [0] es [0] Forms [0] 4R Docs [1] city Docs [0]				Sam Mode De John Server Type Document Date 4/1/17/2006 Keywords Lat Nerro Fort Nerro Middle-Johal D' D' En Lat Nerro
Batches				^	Issue Date
270	2015-04-20 - MANAGER	4/20/2015 5:09 PM	Awaiting Advanced Capture	Total Documents	Social Security Number
	11/17/2015 - MANAGER 11/17/2015 - MANAGER	11/17/2015 3:15 PM 11/17/2015 3:18 PM	Awaiting Advanced Capture Awaiting Advanced Capture	10 5	Disable Document Review Advanced Document Review

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.



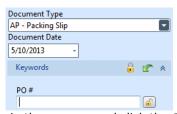
2. Specify the scan mode of the batch to be scanned:

Scan Mode No Index Pre-Index Full Index

- **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)

 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.



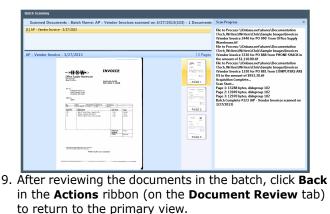
- 4. Load pages in the scanner and click the **Scan** button.
- 5. If prompted, enter a name for the batch, select a scan format, and click **Scan**.

Batch Name				
AP - Vendor Invoices scanned on 3/28/2013				
Scan Format				
Scall Format				
TWAIN				

- 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.

Scanning complete Total number of pages scanned =3						
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 Page	Delete the last page and continue. If the scanning mode is duplex delete both the front and back of the last scanned page.					

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.

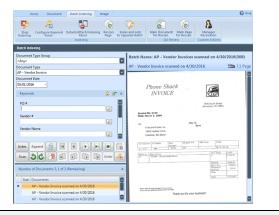


Accessing the Batch Indexing Layout

- 1. From the Unity Client window, click the **Batch Processing** button in the **Imaging** ribbon group.
- 2. The **Batch Processing** layout is displayed.

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Batch Processing		
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AR - Bar Code Processing [0]	•	

- 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.

Index	Append			*	
Scan	30			Undo	2

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.

Number of Documents: 3, 0 of 2 (Remaining)					
	Status	Documents			
•	0	AP - Vendor Invoice - 5/21/2013			
		AP - Vendor Invoice - 5/20/2013			
		AP - Vendor Invoice - 5/20/2013			

- 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 hisblights the post 		
	Keyword Set, highlights the next available Keyword Value.		