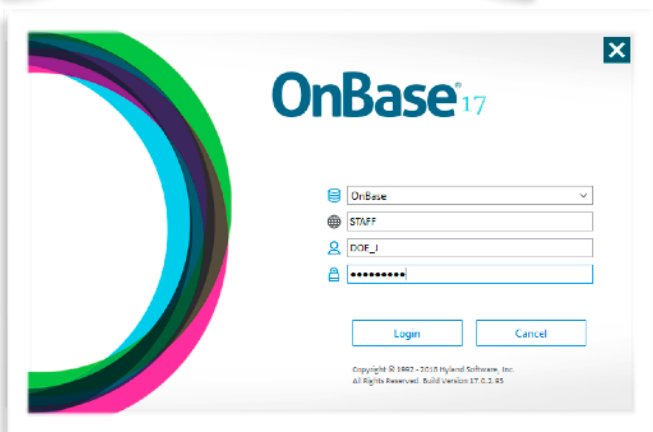


OnBase - Document Imaging - Unity Client - Batch Scan

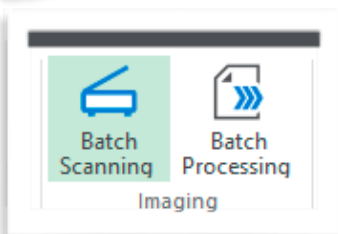
To scan a document for your department to access, simply navigate to the following application from your office computer.



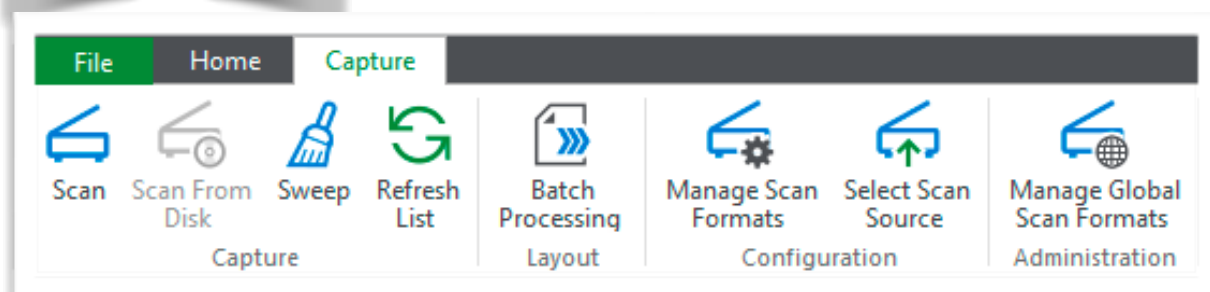
Open the **Unity Client** application on your desktop.



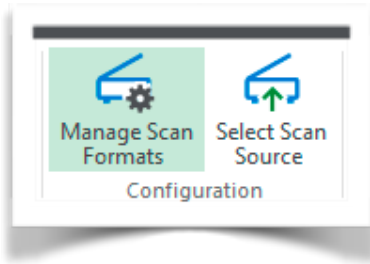
Login with your **user name** and **password**.
(credentials are the same as your email)



Once logged in, click the **Batch Scanning** icon in the top row of icons.
Contact your departments Document Imaging administrator for access to this feature.



Once selected, the **Capture tab** will appear to begin scanning records.

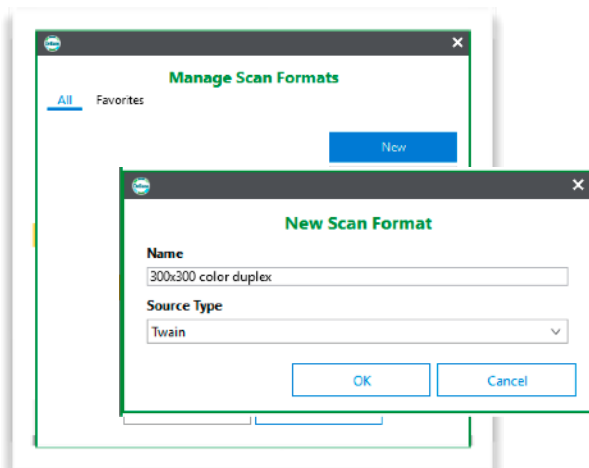


If this is your first time processing a batch, you will need to setup your scanner first.

Click **Manage Scan Formats** to setup a scanner profile.

Each scanner profile can be set with your desired settings to help expedite an import; such as DPI, color vs black and white, or page size.

Depending on the make and model of your scanner, you will see a unique scanner window pop-up. For details on what settings to choose, please contact your departments Document Imaging Administrator.

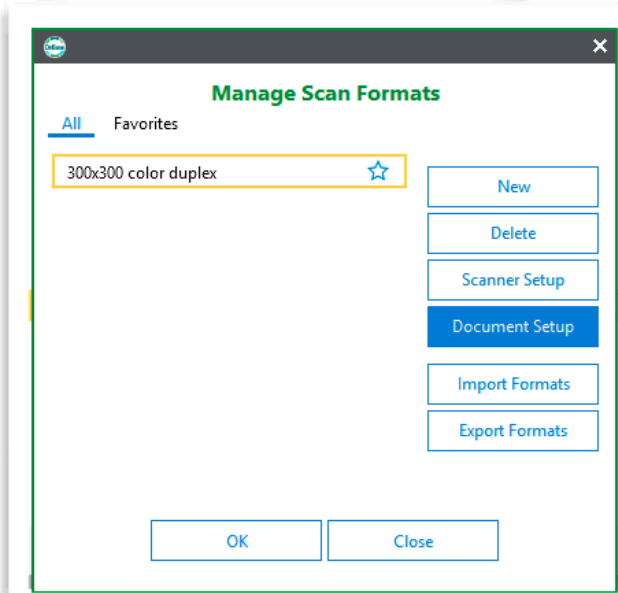


Tip! If you're simply scanning a black and white document with text, select 200x200 for the resolution, select the appropriate paper size, and select gray-scale for color.

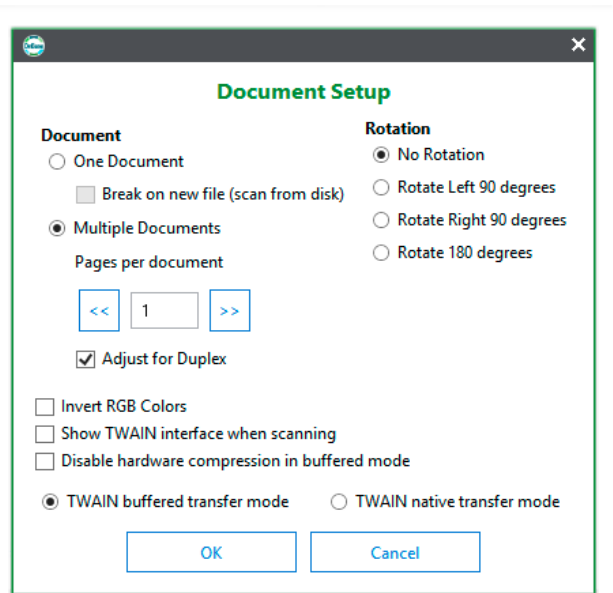
Click the **New** button to add your first Scan Format.

Name the scan format whatever you'd like, I recommend a synopsis of the settings you intend to utilize.

Select the scanner driver you prefer; usually



Click the **Document Setup** button.



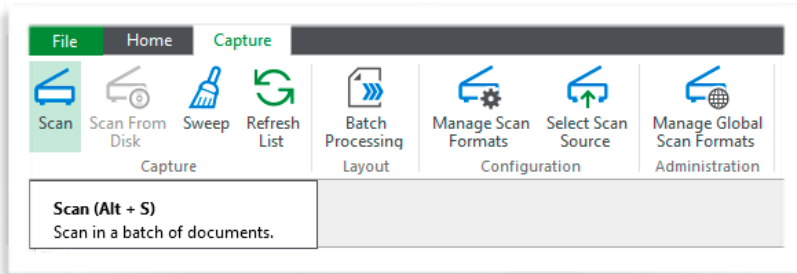
Select **Multiple Documents**

Modify the **Pages per document** as needed

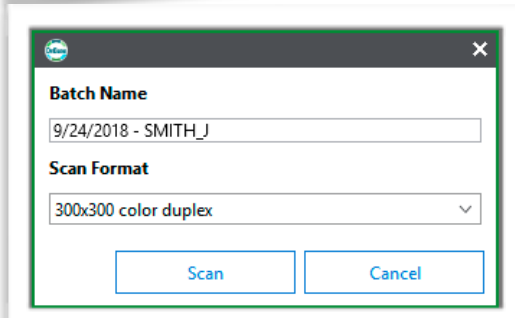
Check off **Adjust for Duplex**

Click **OK** two times

You are now ready to scan your first batch.



Click **Scan** in the toolbar

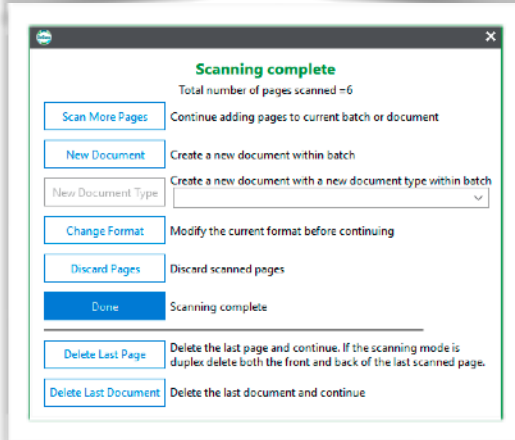


Name your batch

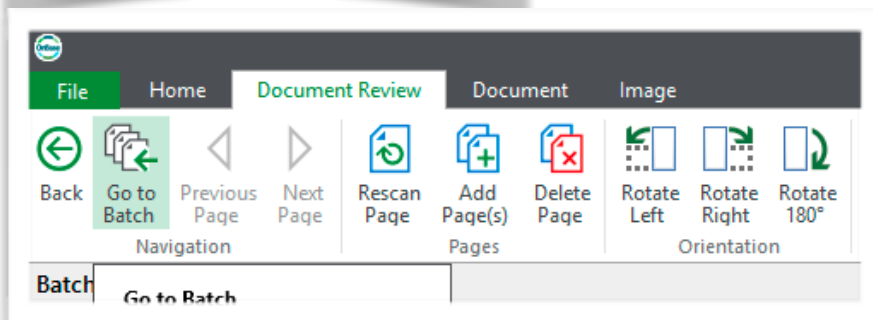
The default should include today's date and your username. Note this name for later.

Select the scan format you created.

Click the **Scan** button



Click **Done**

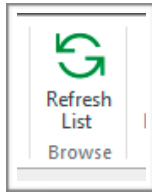


Click **Go to Batch**

Find your batch name, it's likely the first or last one

Check the status

Batch #	Batch Name	Scan Date	Status
346	9/24/2018 - SMITH_J	9/24/18 8:56 AM	Awaiting Image Processing



Click the **Refresh** button to update the status of your batch

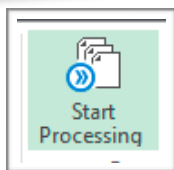
Automatic system processing is done to each batch.

Wait for your batch status to be **Awaiting Document Separation**

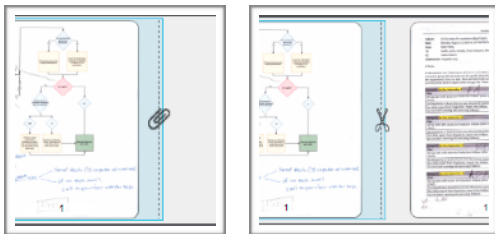
The more pages and the higher the resolution, the longer it will take.

You may need to click the Refresh button multiple times before seeing a status change.

Batch #	Batch Name	Scan Date	Status
346	9/24/2018 - SMITH_J	9/24/18 8:56 AM	Awaiting Document Separation



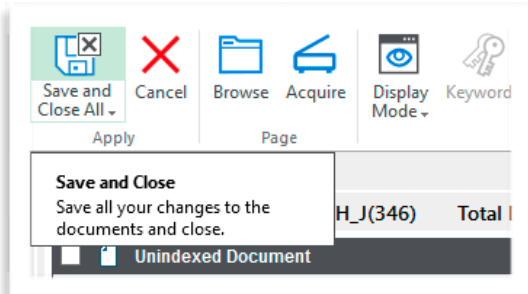
Click the **Start Processing** button when it becomes available



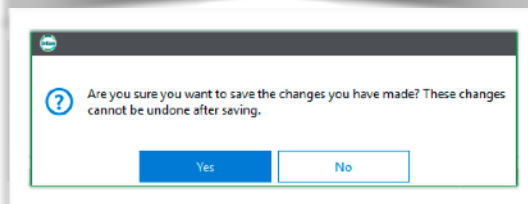
TIP! Drag and drop your pages that should be uploaded as a single document. You can remove blank pages at this time too.

Hover your mouse over the end of a page icon to quickly combine two pages into one document. Click when the **paperclip icon** appears.

Hover your mouse between two pages to quickly split two pages into two documents. Click when the **scissor icon** appears.



Click the **Save and Close All** button when you're done separating you documents.



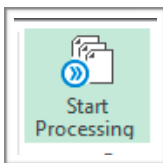
Click **Yes** to commit to your changes.

Tip! Click on the **Skip Document Separation** icon if you know you don't need it. The icon will appear in your ribbon if you have the batch selected and it's processing.

Your batch will then undergo additional system processing.
 Wait for the status to become **Awaiting Index**.

You may need to click the re-fresh button a couple times to see the status update.

Batch #	Batch Name	Scan Date	Status	Total Documents
346	9/24/2018 - SMITH_J	9/24/18 8:56 AM	Awaiting Index	5



Click **Start Processing** to begin Indexing your documents.

Batch Indexing | Scan Queue: AR - Admissions and Records Scanning

Document Type Group: ADM - Admissions

Document Type: ADM Academic Standards Petitions

Document Date: 09/24/18

Student Record Lookup

Keywords:

ID

Last Name

First Name

Middle Name

SSN

Date of Birth

PRC ID

Singularity Doc ID

Index

A preview of your document appears in the right section of the application.

Select the appropriate **document group**.

Select the appropriate **document type**.

Fill in all necessary **keywords**.

Tip! *These keywords will help you find your files later.*

Tip! *Type a students ID number and hit the TAB key to auto-populate a student record.*

Click the **Index** button.

Repeat this process until all documents have been indexed.

Indexing Stopped or Completed

Review the Last Action
 Return to the indexing panel to review the last action.

Save and Transition
 Save changes and transition the batch to the next processing queue.

Save and Close
 Changes will be saved but the batch will not transition to the next processing queue.

Click **Save and Transition**

Tip! *After the transition, the documents in this batch will be available to all users who have access to the document types.*