

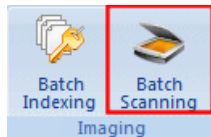
Getting Started

1. To launch the Unity Client, double-click the **Unity Client** icon on the workstation's desktop. The logon 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** to log on. Once the Application Server you are connecting to is finished initializing, the Unity Client window is displayed.

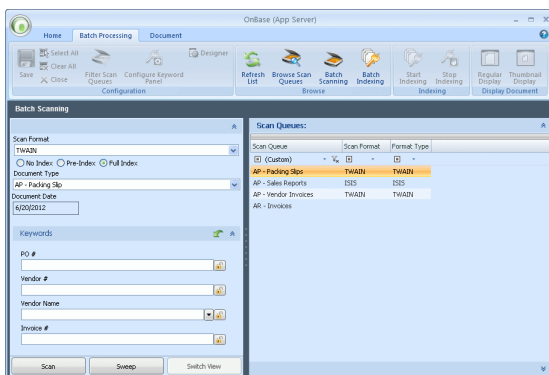
Note: The Application Server you are connecting to may take a few minutes to initialize.

Accessing the Batch Scanning Layout

1. From the Unity Client window, click the **Batch Scanning** button in the Imaging ribbon group.

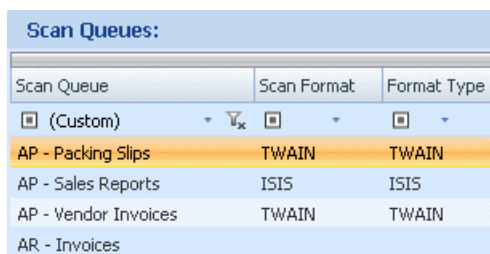


2. The **Batch Scanning** layout is displayed.

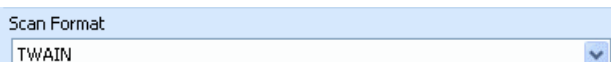


Scanning a Batch

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

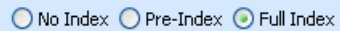


2. From the **Scan Format** drop-down list on the left, select the scan format you would like to use to scan the batch.



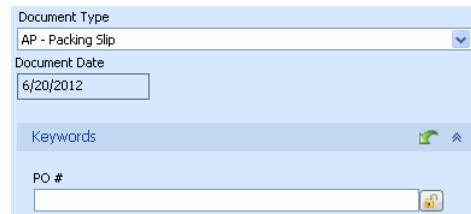
Scanning a Batch (continued)

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

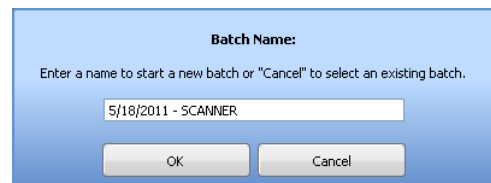


- **No Index:** No default Document Type or Keyword data is manually assigned to the documents before they are scanned. After scanning, the batch is routed for manual indexing.
- **Pre-Index:** Default Document Type and Keyword data are specified before scanning. After scanning, the batch is routed for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

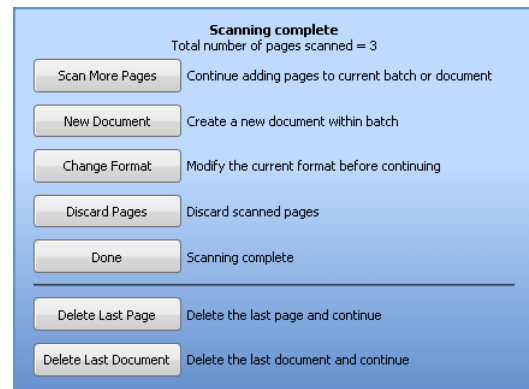
4. If you are scanning in **Pre-Index** or **Full Index** mode, select a Document Type from the drop-down list and enter any desired Keyword Values.



5. Load pages in the scanner and click the **Scan** button.
6. If prompted, enter a name for the batch and click **OK**.



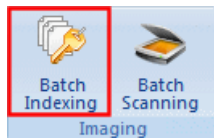
7. If the scanner's interface is displayed, modify scanner options as desired and click **Scan**.
8. When scanning is complete, the **Scanning complete** dialog box is displayed.



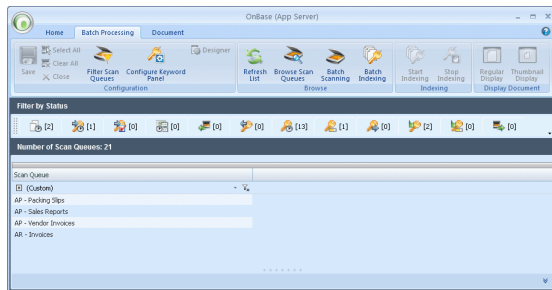
9. Select the next desired action (e.g., scan more pages, scan a new document, delete, etc.). When you are done scanning, the batch is automatically routed to the next configured batch status queue.

Accessing the Batch Indexing Layout

1. From the Unity Client window, click the **Batch Indexing** button in the Imaging ribbon group.



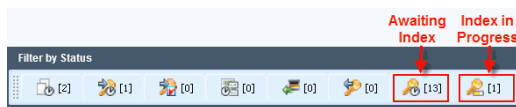
2. The **Batch Indexing** layout is displayed.



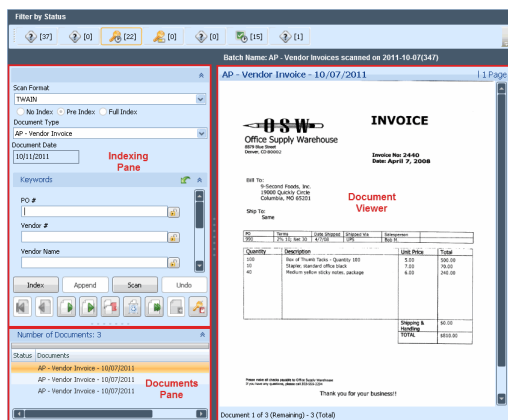
Indexing a Batch

1. From the **Batch Indexing** layout, view the batches to be indexed by doing one of the following:

- In the bottom pane, double-click the scan queue that the batch you wish to index is associated with.
- In the **Filter by Status** task pane, click the **Awaiting Index** or **Index in Progress** button (depending on where the batch you wish to index resides).



2. Select the batch you wish to index.
3. Either click the **Start Indexing** button in the Indexing ribbon group or right-click on the batch and select **Index Documents**.
4. The **Indexing** and **Documents** panes are displayed, and the first page of the first unindexed document is displayed in the Document Viewer.



Indexing a Batch (continued)

5. 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.

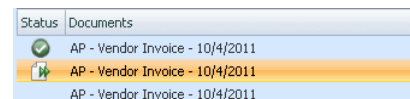


6. Select a Document Type from the drop-down list and enter any desired Keyword Values.
7. When you are finished entering Keyword Values for the current document, click the **Index** button. The document is marked as indexed, with a check mark next to it in the **Documents** pane.

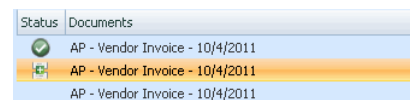


8. The next unindexed document in the batch is displayed in the Document Viewer. Do one of the following:

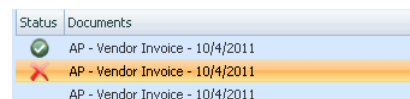
- To index the document, repeat steps 6-7.
- To skip the document, click the **Skip Document** button. The document will be marked as skipped in the **Documents** pane.



- To append the document to the previously-indexed document, click the **Append** button. The document will be marked as appended in the **Documents** pane.



- To delete the document, click the **Delete Document** button. The document will be marked as deleted in the **Documents** pane.



9. 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+X / Alt+I	Indexes the document.
Alt+P	Appends the current document to the previously-indexed document.
Alt+Y	Clears Keyword Values.
Alt+G	Deletes the page.
Alt+C	Deletes the document.
Alt+K	Skips the document during indexing.
Alt+Q	Stops indexing.
F6	Duplicates Keyword Type field.