# Batch Indexing Documents – Unity Client

Indexing is the process of adding keyword values to documents in order to search for content (retrieve), route items through workflow, report on content and more. This guide offers instructions on how to index documents imported in batches using the OnBase Unity Client. *Re-Indexing* documents allows for keyword values on stored documents to be modified/corrected, along with changing the document type if necessary. For instructions on how to import and index documents using the OnBase Web Client, see the Importing Documents – Web Client Quick Reference Guide.

*Please note that your processing may vary from the basic process described in this guide, depending on the configuration of the scan queue being used. Additionally, not all users will have the ability to perform all function including re-indexing. For more information about your department's scan queue(s) or your access, please contact your supervisor.
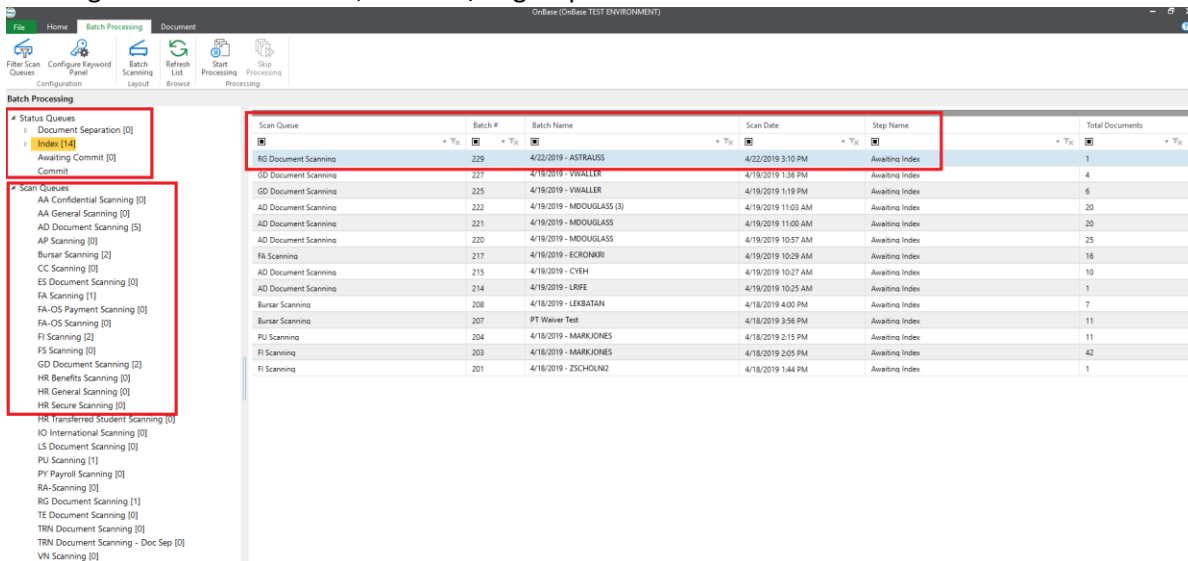
Batch Indexing Documents

Perform the following steps to index a document using the Unity Client.

1. From the Unity Client homepage, select the **Batch Processing** icon (located on the toolbar at the top of the screen).
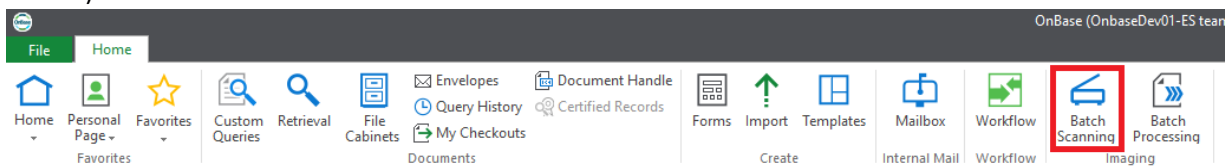

2. Select the **Status Queue** or **Scan Queue** that includes the batch of documents you want to index. The column headings can be used to filter, sort and/or group the list of batches.


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3. Select documents for indexing by highlighting on the document(s) and clicking **Start Processing** from the Batch Process tab toolbar.

    To select multiple documents, hold the CTRL key while clicking the documents.
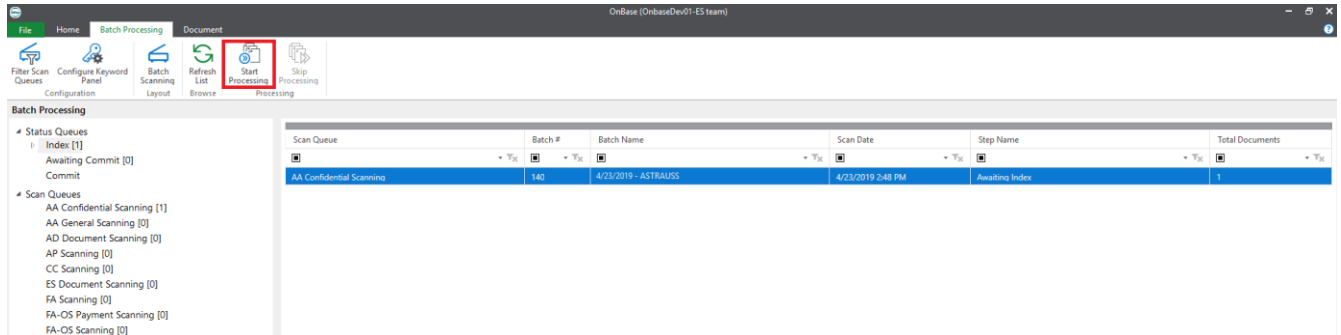
4. Perform the following steps for each document/page in the batch:
    a. Choose a **Document Type** from the drop-down list. *If a Document Type has not already been specified based on the scan queue or during pre-indexing (prior to scanning).*
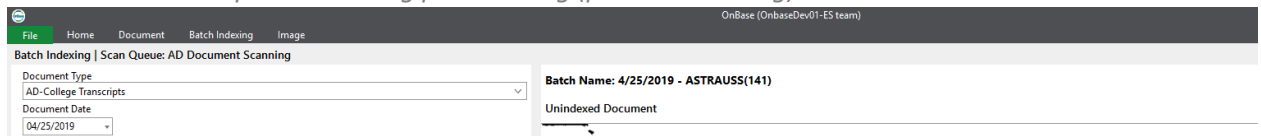
    b. Enter applicable **Keyword** values.
        i. **Required Keywords**: Fields labeled with red text are <u>required</u> keywords; the document cannot be indexed without these values.

    ii. **Locking Keywords**: If the same keyword value should be applied to following documents, click the lock icon to retain the value for that keyword until the lock is removed or the batch is complete.

    iii. **Adding a Keyword Instance**: Double click a keyword field label to add another instance of that keyword value (for example, if the document applies to two semesters, you can double click the Term Code keyword to enter values for 2197 and 2021).

Note: This is not available for all documents.

c. **Adjust the view** of the document by rotating pages if necessary, using the buttons at the bottom of the left side panel or on the Image tab of the menu.

d. If the page or document should be deleted, click the **Delete** button at the bottom of the left side panel.

e. If the page should be added to the previous document, click the **Append** button at the bottom of the left side panel.

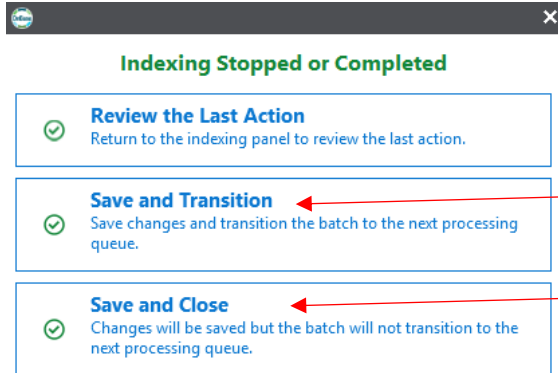f. Once the document is ready, click the **Index** button at the bottom of the left side panel.

g. Following indexing, documents will show as indexed in the list of documents in the batch.

5. When all documents in the batch have been processed (or if you use the **Stop Indexing** button in the middle of a batch), you will be prompted with the following options.

Save and Transition: Will commit the indexing and move the batch to the next processing stage.

Save and Close: If you are not done indexing the batch, choose this option.
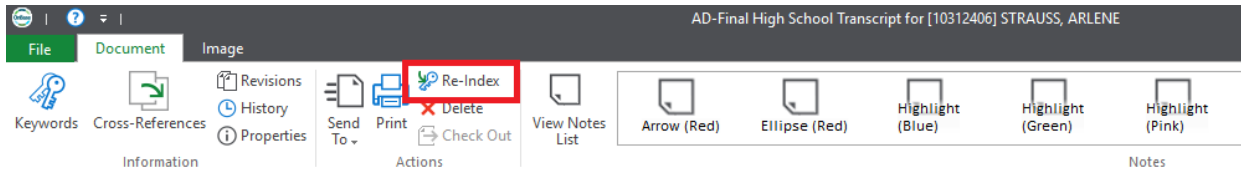
Select the appropriate action.

Re-Indexing Documents

Perform the following steps to re-index a document using the Unity Client.

1. **Identify** a document to re-index.
   After searching a Document Type Group, Document Type(s), Keywords, and a Date Range, identify a document under *Search Results* and double click to open it.
2. From the Document tab toolbar menu, click **Re-Index**.

On the right hand side of the screen, a "Re-Index" column will appear.

3. **Update** the Document Type and/or keyword values as necessary.
   Note: Never change the file type

4. Click **Re-Index** at the bottom of the panel to save changes.

Re-Index	Close