OnBase Quick Reference Guide

Batch Scanning and Sweeping – Unity Client

This guide offers instructions on how to use a scanner to import batches of paper documents, as well as a sweep process to import electronic documents into the OnBase Unity Client. For instructions on how to batch index documents using the OnBase Unity Client, see the Batch Indexing docs using Unity Client Quick Reference Guide.

Scanning Documents

Perform the following steps to scan documents into the OnBase Unity Client.

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

2. Choose the appropriate Scan Queue and choose your Scan Format.
   * You can use the search bar at the top of the list to help find the desired scan queue.

3. Click Scan in the lower right-hand panel or on the Capture tab of the menu.
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4. Enter a **Batch Name** (if prompted, some scan queues will create the name automatically) and select your scan format.

5. Place documents into the scanner’s feeder tray (staples, paper clips and sticky notes removed).

   Click **Scan**.

6. When all pages have been scanned, you will be prompted with the following options. In most cases, **Done** should be selected.
7. Review scanned pages and make any necessary changes (i.e. rotating documents, etc.).

8. When you are ready to send the batch to indexing, click **Go to Batch** to navigate to **Batch Processing**.

*To scan another batch, click **Back** to navigate back to **Batch Scanning**.*
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Sweeping Documents

Perform the following steps to import (or sweep) already existing electronic documents into the OnBase Unity Client.

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

2. Choose the appropriate scan queue for the documents being scanned. You can use the search bar at the top of the list to help find the desired scan queue.

3. Click **Sweep** in the lower right-hand panel or on the Capture tab of the menu.

![Batch Scanning Icon](image)

![Sweep Button](image)
4. Choose whether you would like to sweep all files in a folder, or just one file.

a. If you choose **Sweep all files in a particular directory**, a *Sweep Directory* popup window will appear. Click the three dots at the top right corner of the popup window.

Select the desired folder and click **OK**.
Adjust settings as necessary and click **Sweep**.

Create a **Batch Name** and click **Sweep** again.

b. If you choose **Import one file**, a file browser window will appear. Navigate to the desired document and click **Open**.

Create a **Batch Name** and click **Sweep** again.
5. Review scanned pages and make any necessary changes (i.e. rotating documents, etc.).
6. When you are ready to send the batch to indexing, click Go to Batch to navigate to Batch Processing.
*To sweep another batch, click Back to navigate back to Batch Scanning.