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).



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.

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Scan Scan From Sweep Refresh Disk Capture	Scan Format Black and White Simplex V 🚱 Manage Global Scan Format
Batch Scanning	
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3. Click Scan in the lower right-hand panel or on the Capture tab of the menu.

Scan				
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Scan From Sweep Refresh List	Batch Processing	Scan Source Canon DR-M160 TWAIN (TWAI \vee Scan Format Black and White Duples \vee	Manage Global Scan Formats	
Capture	Layout	Configuration	Administration	

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4. Enter a **Batch Name** (if prompted, some scan queues will create the name automatically) and select your scan format.

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Batch Name	
4/22/2019 - ASTRAUSS	
Scan Format	
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Scan	Cancel

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

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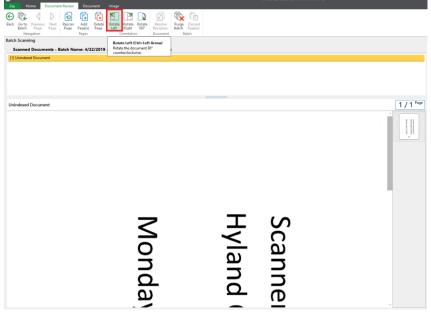
Click Scan.

6. When all pages have been scanned, you will be prompted with the following options. In most cases, **Done** should be selected.

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Scan	More Pages	Scanning com Total number of pages s Continue adding pages to	•
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-	inge Format	Modify the current format	t before continuing
Dis	card Pages	Discard scanned pages	
Ω	Done	Scanning complete	
	tte Last Page Last Document	duplex delete both the fro	ontinue. If the scanning mode is nt and back of the last scanned page. and continue



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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File Home Document Review Document	Image	
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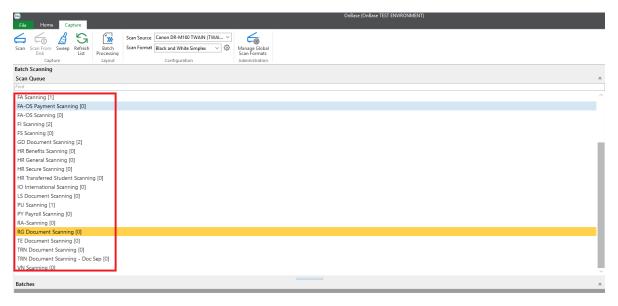
Sweeping Documents

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

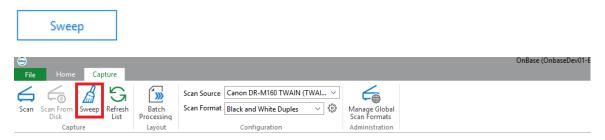
1. From the Unity Client homepage, select the **Batch Scanning** icon (located on the toolbar at the top of the screen).

Contrase (Onbase (OnbaseDev01-ES team)					
Home Personal Page - Favorites	Custom Queries Retrieval Query History Cabinets Document Handle Query History My Checkouts Document S	Forms Import Templates Create Internal Mail Workflow Workflow Create Namagement - Scanning Workflow Workflow Workflow Workflow			

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.

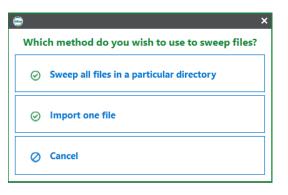


3. Click **Sweep** in the lower right-hand panel or on the Capture tab of the menu.





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.

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Sweep Directory	
Delete Files After Sweep	
Sweep Images Only	
Image Orientation	
No Rotation Flip Vertically	
Rotate Left 90 degrees	
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O Rotate 180 degrees	
Sweep Cancel	

Select the desired folder and click **OK**.

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> 💻 This PC			
> 🐂 Libraries			
> 💣 Network			
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👩 Recycle Bin			
Make New Folder	ОК	Cancel	



Adjust settings as necessary and click Sweep.			
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Sweep Directory			
Y:\Administration and Operations\A&O Systems\OnBase Workfle			
Delete Files After Sweep			
Sweep Images Only			
Image Orientation			
No Rotation			
○ Rotate Left 90 degrees □ Flip Horizontally			
O Rotate Right 90 degrees			
Rotate 180 degrees			
Sweep Cancel			
Create a Batch Name and click <i>Sweep</i> again.			
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Scan Format			
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Sweep Cancel			

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

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



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- 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.

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File Home Document Review			Docu	ment								
Batch	Previous Next Page Page	Rescan Page	Add Page(s)	Delete Page	Rotate Left	Right	Rotate 180°	Resolve Revisions	Purge Batch	Discard Page(s)		
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Batch Scanning												
Scanned Documents - Batch Name: 4/23/2019 - ASTRAUSS(140) - 1 Documents												
[1] Unindexed Document												

