

# OnBase Quick Reference Guide

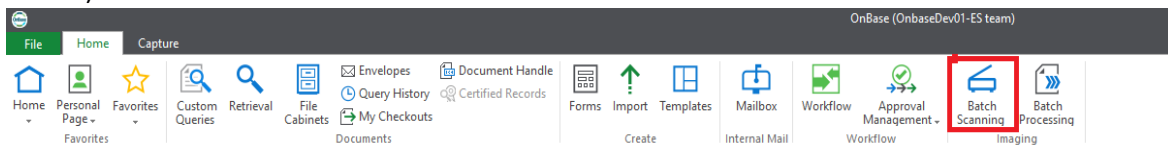
## Batch Scanning and Sweeping – Unity Client

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.

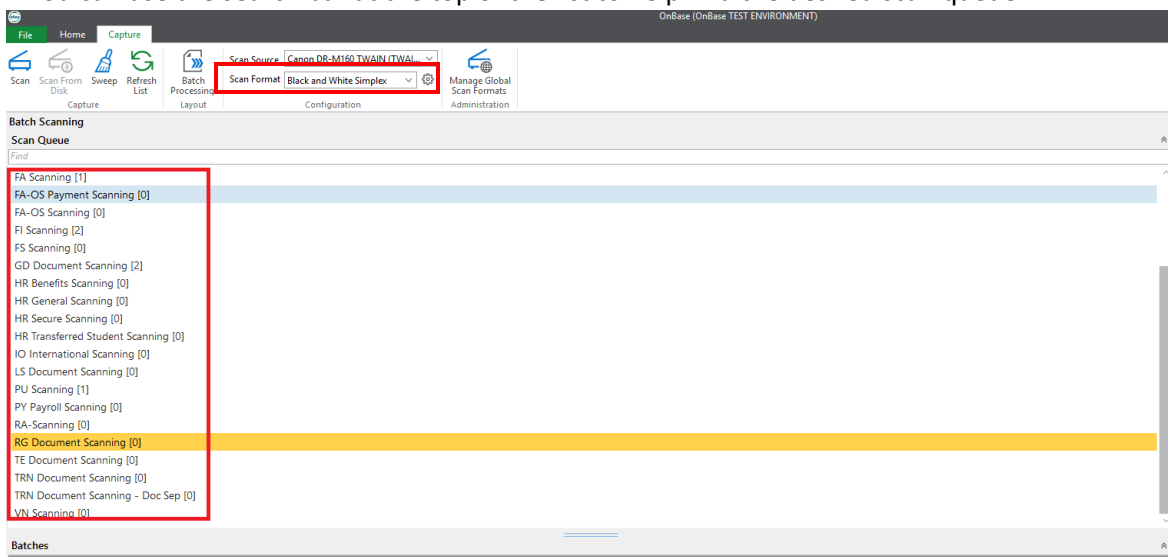
### Scanning Documents

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

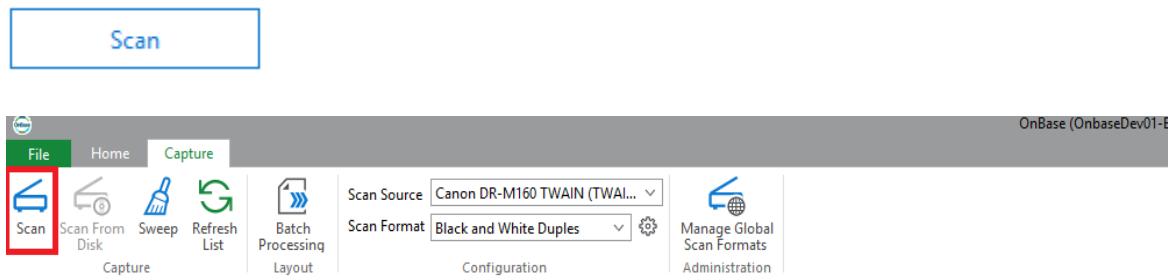
1. From the Unity Client homepage, select the **Batch Scanning** icon (located on the toolbar at the top of the screen).



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.

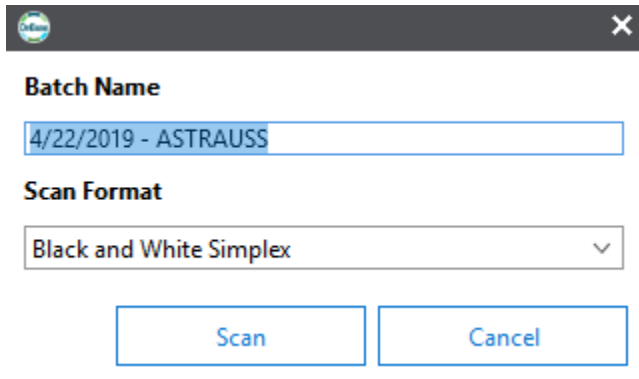


3. Click **Scan** in the lower right-hand panel or on the Capture tab of the menu.



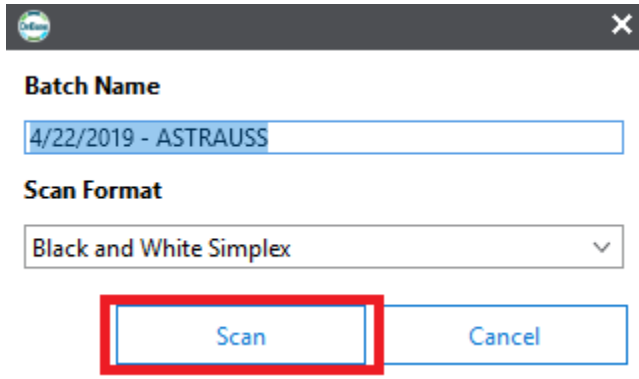
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4. Enter a **Batch Name** (if prompted, some scan queues will create the name automatically) and select your scan format.



A screenshot of the OnBase software interface showing a dialog box for entering a batch name and selecting a scan format. The dialog box has a title bar with the OnBase logo and a close button. It contains two input fields: "Batch Name" with the text "4/22/2019 - ASTRAUSS" and "Scan Format" with a dropdown menu showing "Black and White Simplex". At the bottom are two buttons: "Scan" and "Cancel".

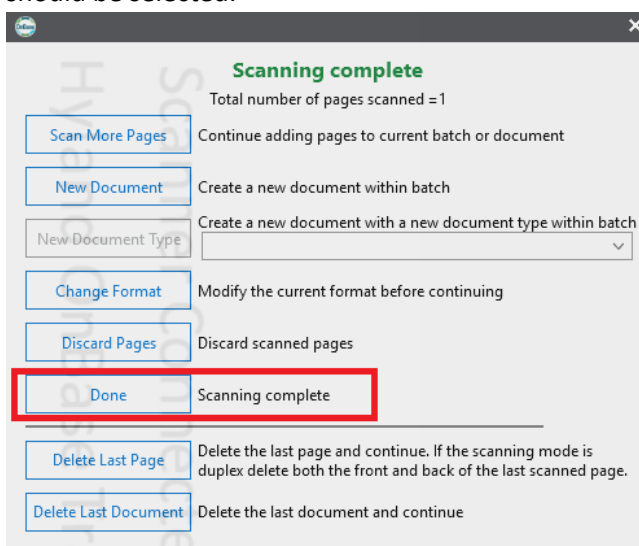
5. Place documents into the scanner's feeder tray (staples, paper clips and sticky notes removed).



A screenshot of the OnBase software interface showing the same dialog box as in the previous step. The "Scan" button is highlighted with a red rectangular border.

Click **Scan**.

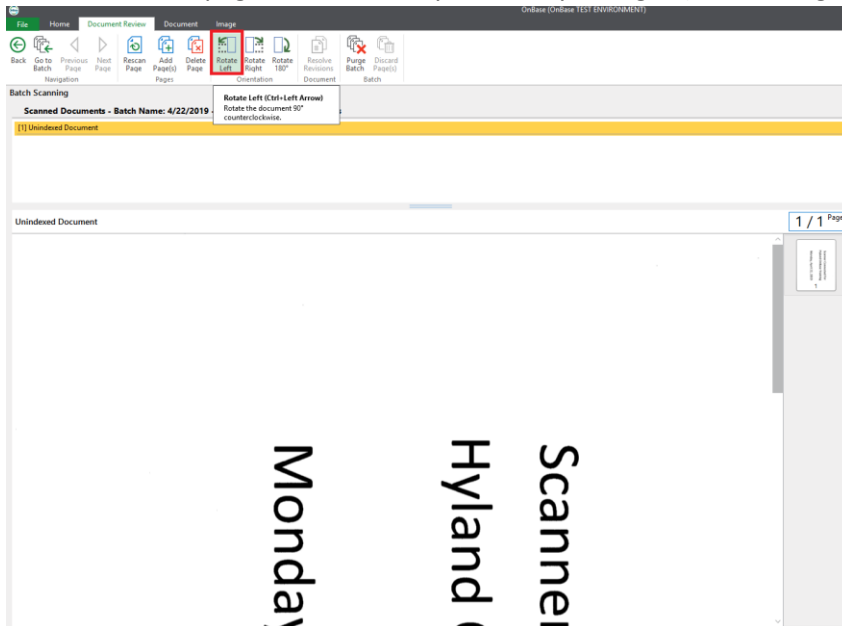
6. When all pages have been scanned, you will be prompted with the following options. In most cases, **Done** should be selected.



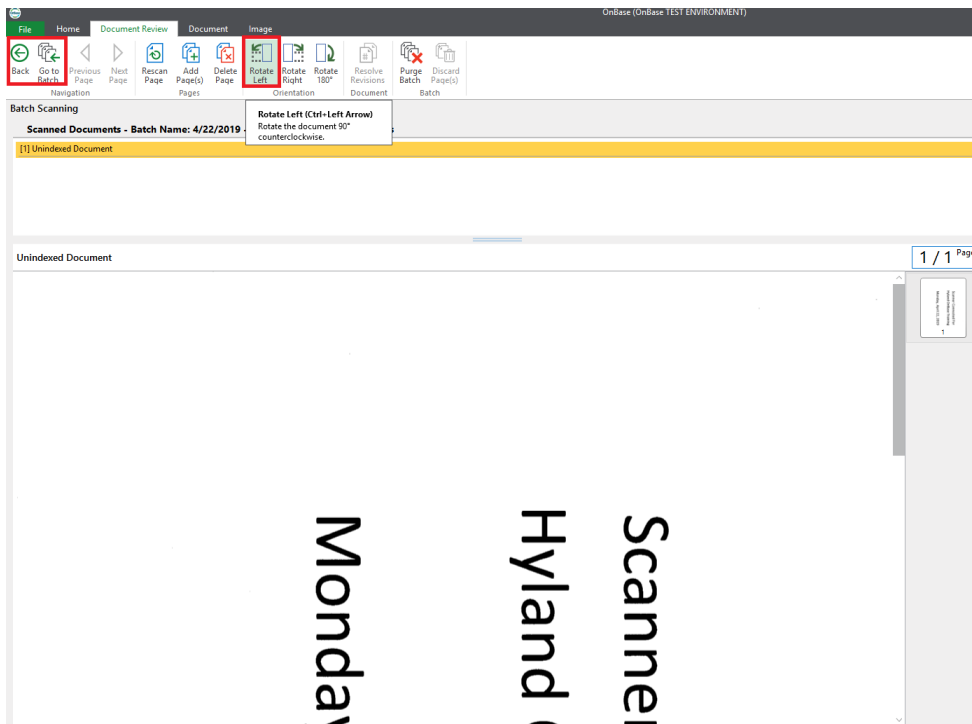
A screenshot of the OnBase software interface showing a "Scanning complete" dialog box. The dialog box has a title bar with the OnBase logo and a close button. It displays the text "Scanning complete" in green, followed by "Total number of pages scanned = 1". Below this are several options, each with a button and a description: "Scan More Pages" (Continue adding pages to current batch or document), "New Document" (Create a new document within batch), "New Document Type" (Create a new document with a new document type within batch), "Change Format" (Modify the current format before continuing), "Discard Pages" (Discard scanned pages), "Done" (Scanning complete), "Delete Last Page" (Delete the last page and continue. If the scanning mode is duplex delete both the front and back of the last scanned page.), and "Delete Last Document" (Delete the last document and continue). The "Done" button is highlighted with a red rectangular border.

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- Review scanned pages and make any necessary changes (i.e. rotating documents, etc.).



- 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.*

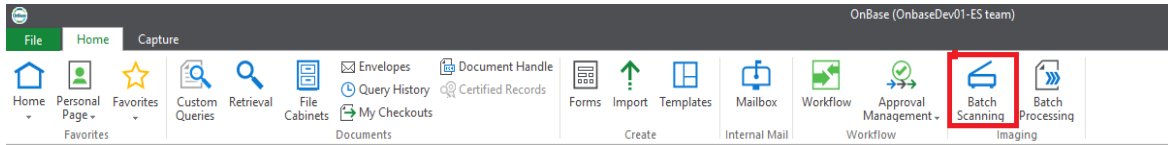


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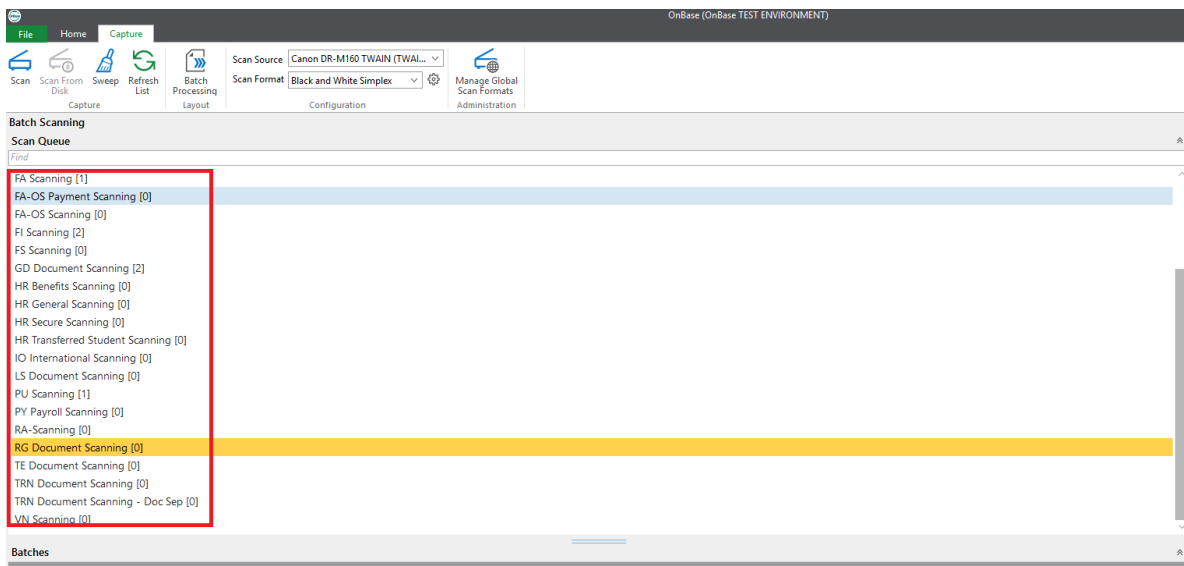
## Sweeping Documents

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

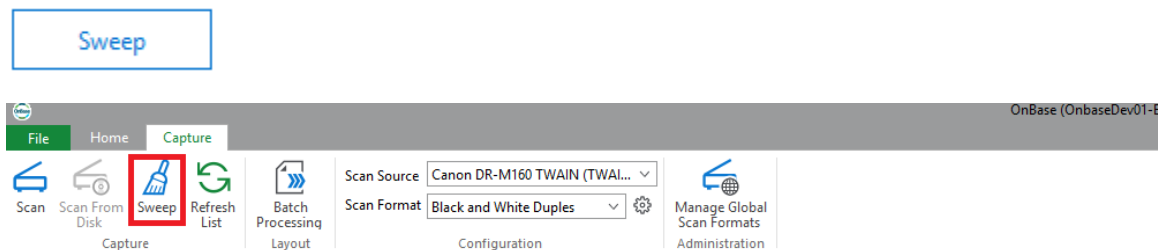
1. From the Unity Client homepage, select the **Batch Scanning** icon (located on the toolbar at the top of the screen).



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.

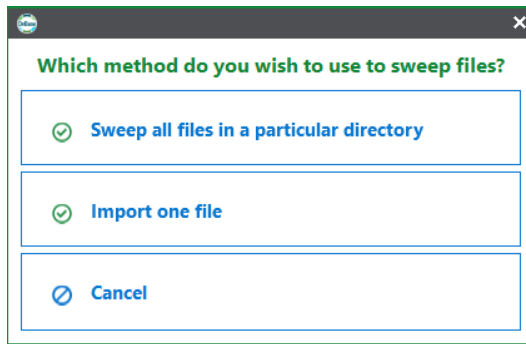


3. Click **Sweep** in the lower right-hand panel or on the Capture tab of the menu.

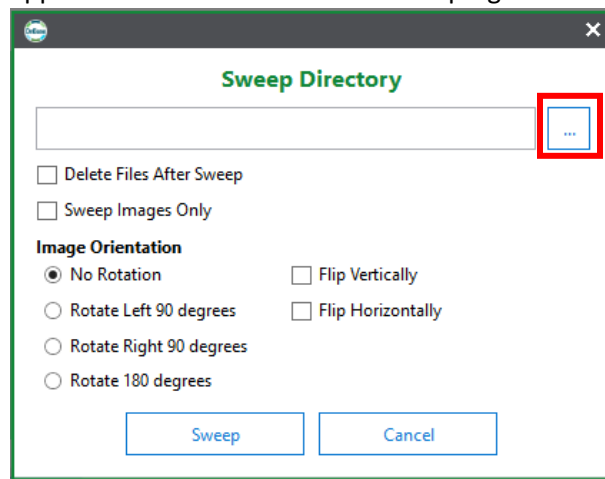


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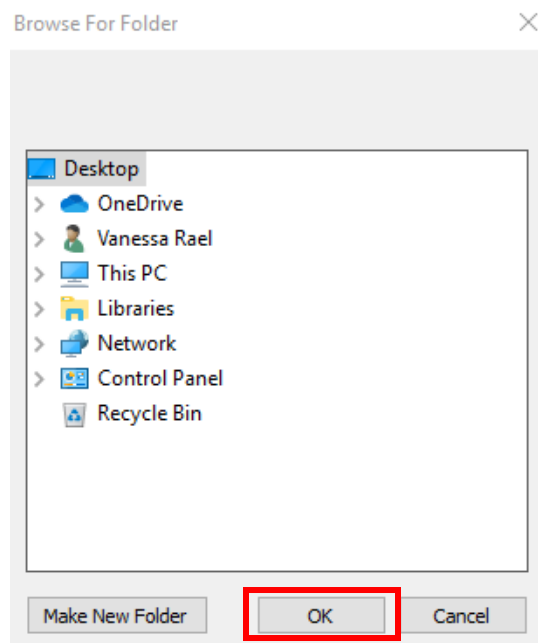
4. Choose whether you would like to sweep all files in a folder, or just one file.



- 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.

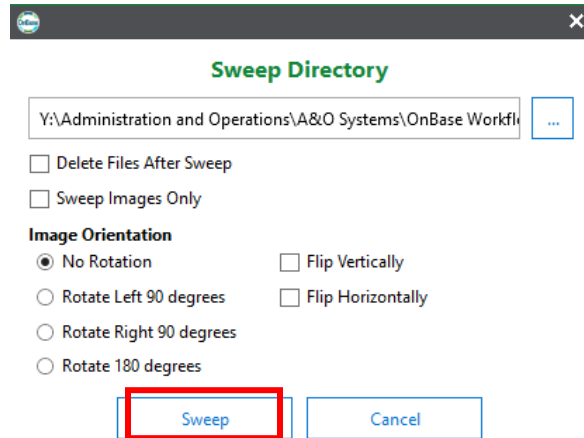


Select the desired folder and click **OK**.

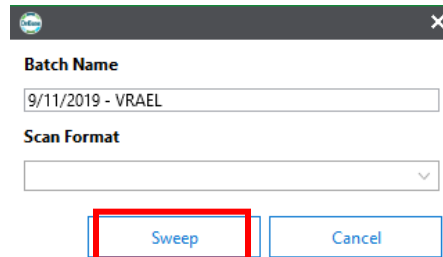


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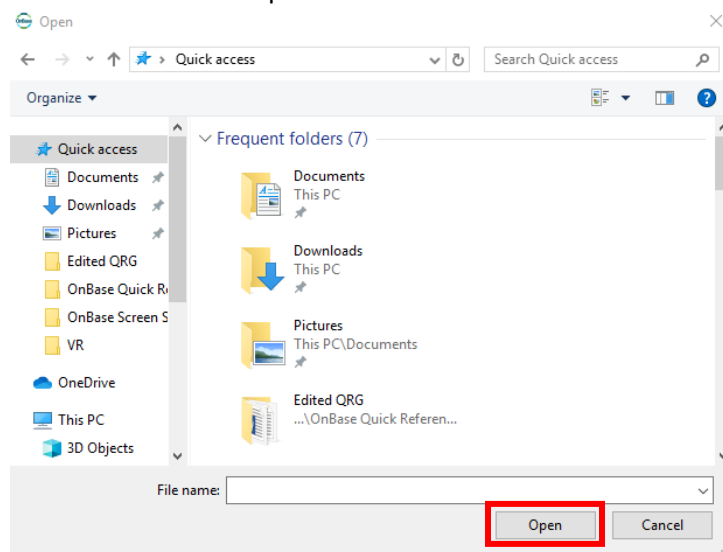
Adjust settings as necessary and click **Sweep**.



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

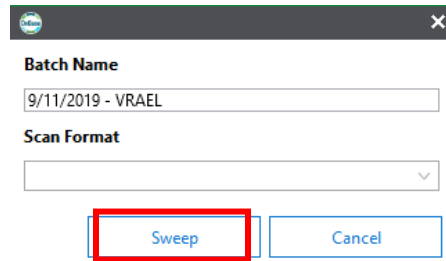


- b. If you choose **Import one file**, a file browser window will appear. Navigate to the desired document and click Open.



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

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A small dialog box titled "Batch Name" with a close button (X) in the top right corner. It contains a text input field with the value "9/11/2019 - VRAEL". Below the input field is a "Scan Format" label and a dropdown menu. At the bottom are two buttons: "Sweep" (highlighted with a red rectangle) and "Cancel".

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.*

