# **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.

File Home Capture	
Scan Scan From Sweep Refresh Disk Capture	Scan Format  Black and White Simplex V 🚱 Manage Global Scan Format
Batch Scanning	
Scan Queue	A
Find	
FA Scanning [1]	
FA-OS Payment Scanning [0]	
FA-OS Scanning [0]	
FI Scanning [2]	
FS Scanning [0]	
GD Document Scanning [2]	
HR Benefits Scanning [0]	
HR General Scanning [0]	
HR Secure Scanning [0]	
HR Transferred Student Scanning [0]	
IO International Scanning [0]	
LS Document Scanning [0]	
PU Scanning [1]	
PY Payroll Scanning [0]	
RA-Scanning [0]	
RG Document Scanning [0] TE Document Scanning [0]	
TRN Document Scanning [0]	
TRN Document Scanning [0] TRN Document Scanning - Doc Sep [0]	
VN Scanning [0]	
	· · · · · · · · · · · · · · · · · · ·
Batches	A

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

Scan				
😁 File Home Capture				OnBase (OnbaseDev01-E
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	

1



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

<b>e</b>	×
Batch Name	
4/22/2019 - ASTRAUSS	
Scan Format	
Black and White Simplex	~
Scan	Cancel

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

			×
TRAUSS			
e Simplex			$\sim$
Scan		Cancel	
	TRAUSS te Simplex Scan	te Simplex	te Simplex

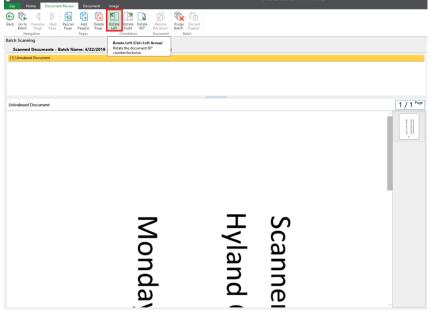
Click Scan.

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

			×
Scan	More Pages	Scanning com Total number of pages s Continue adding pages to	•
	v Document	Create a new document w	vithin batch vith a new document type within batch
-	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.

9		OnBase (OnBase TEST ENVIRONMENT)
File Home Document Review Document	Image	
Back Go to Paqe Paqe Navigation	Rotate Rotate Rotate Revolve Revisions Document	Page Discard Batch Pagelo Batch
Batch Scanning	Rotate Left (Ctrl+Left Arrow)	
Scanned Documents - Batch Name: 4/22/2019	Rotate the document 90*	
[1] Unindexed Document	counterclockwise.	
Unindexed Document		1 / 1 <sup>Page</sup>
		Version and the second se
		U U U
	· <b>O</b>	— ()
	$\underline{\sim}$	$() \qquad = \qquad \qquad$
	=	
	Q	Scanne Hyland
	5	$\mathbf{O}$
	Monda	(D



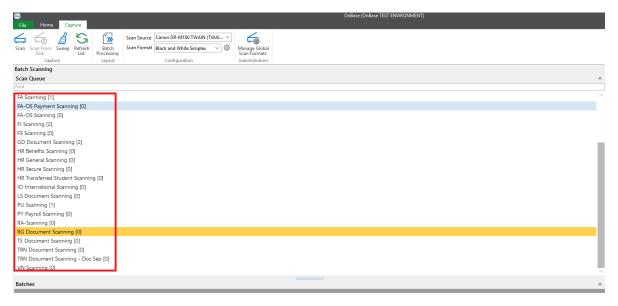
### **Sweeping Documents**

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

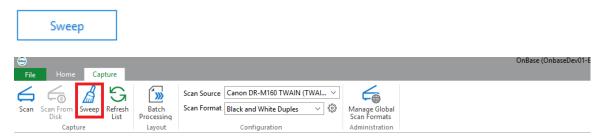
1. From the Unity Client homepage, select the **Batch Scanning** icon (located on the toolbar at the top of the screen).

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.

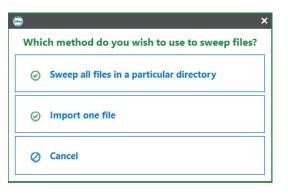


3. Click **Sweep** in the lower right-hand panel or on the Capture tab of the menu.





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.

۵	×
Sweep Directory	
Delete Files After Sweep	
Sweep Images Only	
Image Orientation	
No Rotation Flip Vertically	
Rotate Left 90 degrees	
O Rotate Right 90 degrees	
O Rotate 180 degrees	
Sweep Cancel	

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

rowse For Folder			
📃 Desktop			
> 📥 OneDrive			
> 🤱 Vanessa Rael			
> 💻 This PC			
> 🐂 Libraries			
> 💣 Network			
> 🖭 Control Panel			
👩 Recycle Bin			
Make New Folder	ОК	Cancel	



Adjust settings as necessary and click Sweep.			
۵ ک			
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 <b>Batch Name</b> and click <i>Sweep</i> again.			
🖨 🛛 ×			
Batch Name			
9/11/2019 - VRAEL			
Scan Format			
×			
Sweep Cancel			

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

😑 Open	×
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\bigstar$ > Quick access $\checkmark$ $\eth$	Search Quick access $ ho$
Organize 🔻	€. <b>- - - (</b> )
★ Quick access	^
Documents Documents  Downloads	
Edited QRG	
OnBase Quick R OnBase Screen S VR VR	
OneDrive  Interpretended Interpretend Interpretended Interpretended Interpretended Interpretend	
File name:	
	Open Cancel

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



<b></b>				×
Batch Name				
9/11/2019 - VRA	EL			
Scan Format				
				$\sim$
		<b>-</b>		
	Sweep		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.

6											OnBase (OnbaseDev01-ES team)	
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)		
	Navigation Pages Orientation Document Batch											
Batch Scanning												
Scanned Documents - Batch Name: 4/23/2019 - ASTRAUSS(140) - 1 Documents												
[1] Unindexed Document												

