

Quick Reference Guide

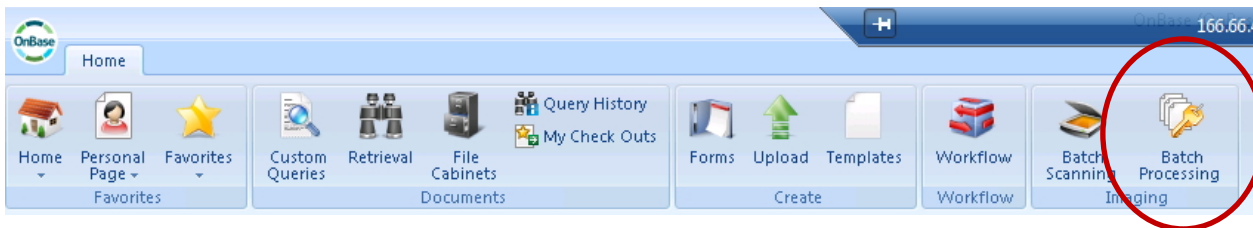
Batch Processing: Indexing documents in OnBase Unity

Introduction: Below are instructions on how index batches in “OnBase Unity”.

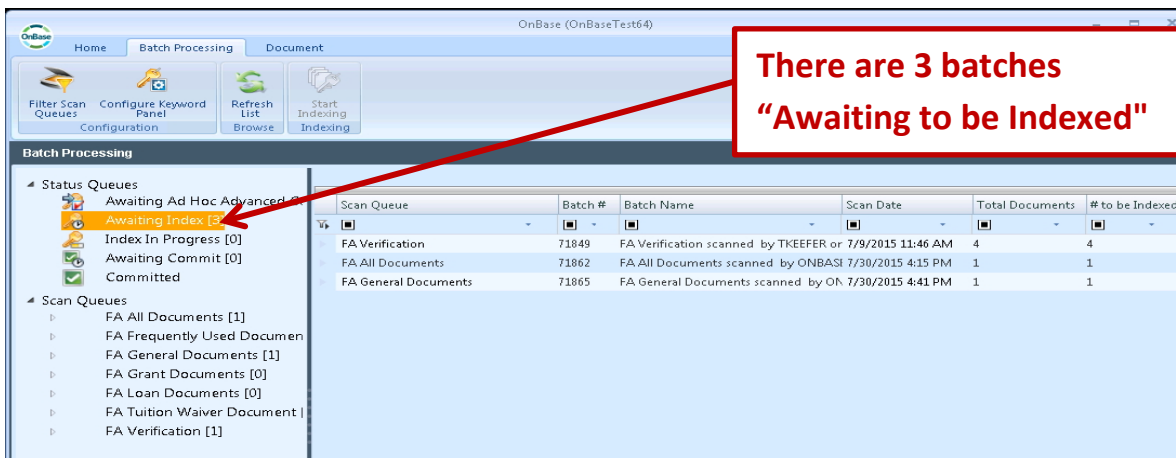
1. Open the “OnBase Unity” Client.



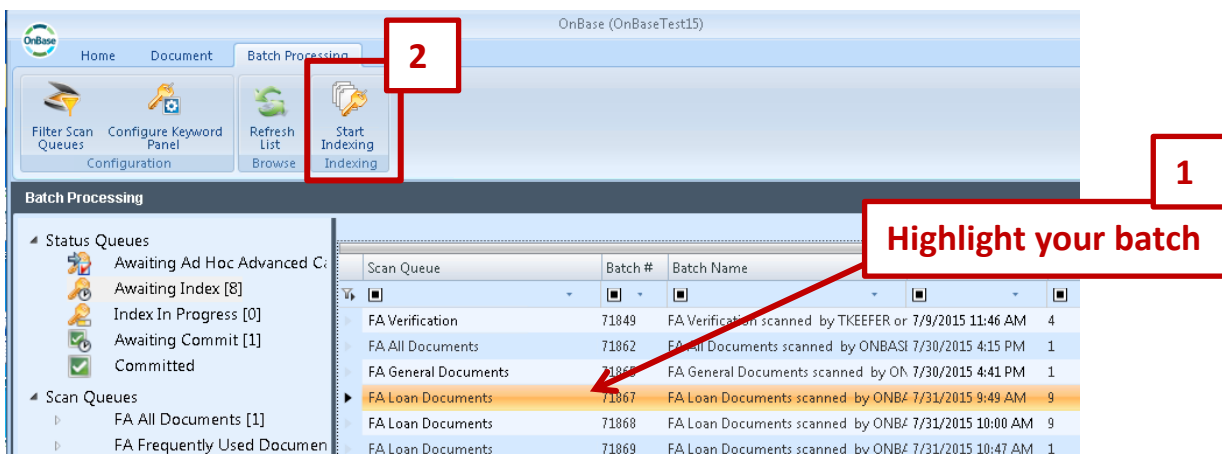
2. Click on “Batch Processing” icon on the Unity ribbon menu.



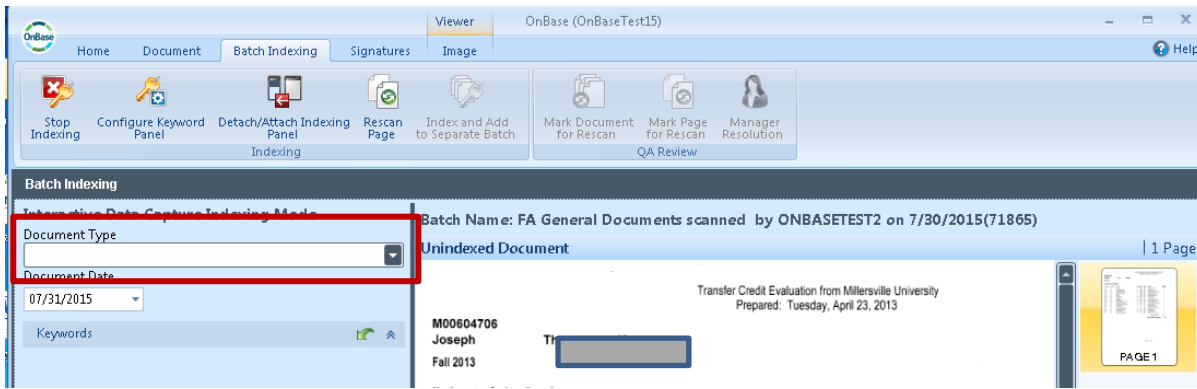
3. The “Batch Processing” window will open and a list of status queues will display in the left panel. Click on the “Awaiting Index” queue to find the batch you need to work on.



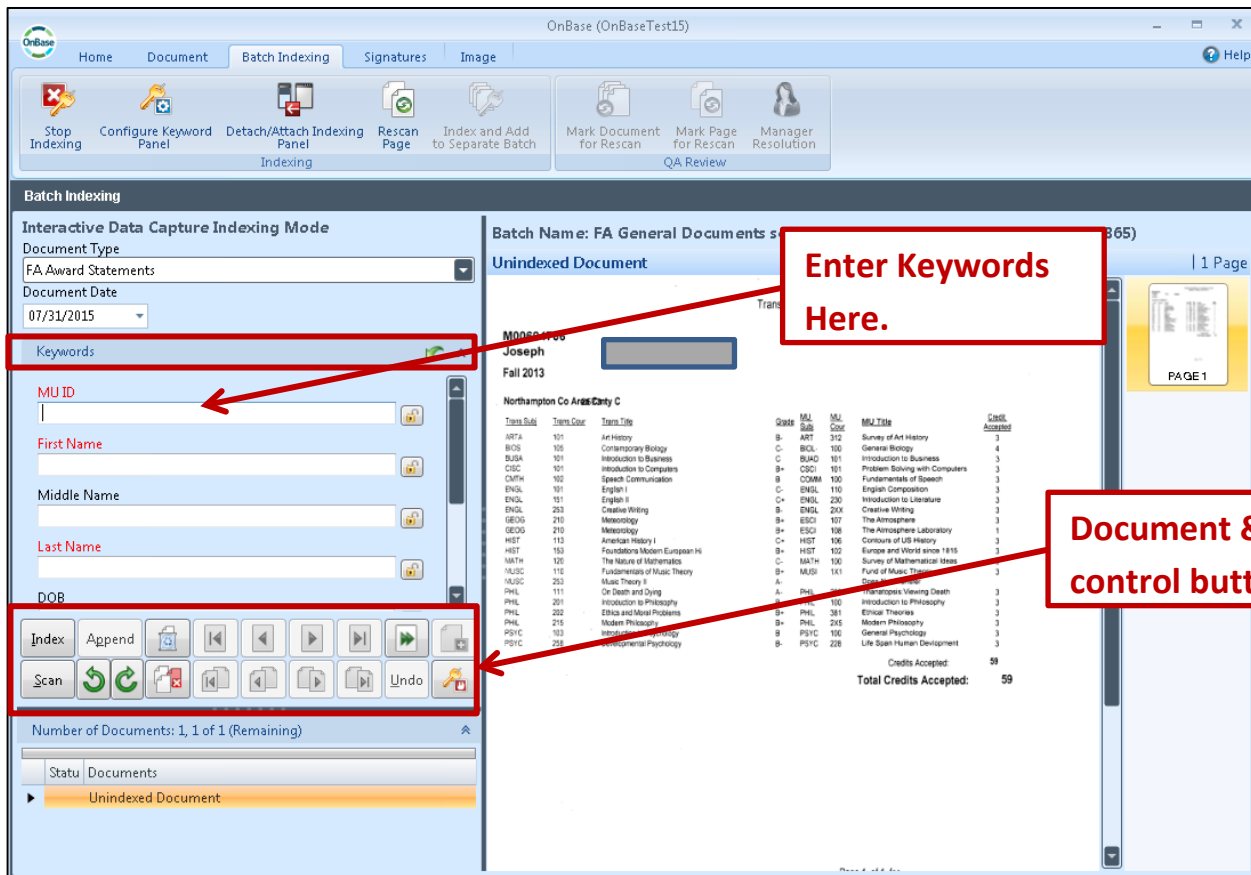
4. Highlight the batch that you want to work on. Select “Index Documents”.



- Once you click on "Index Documents", you will be able to index each document in the batch. Select the document type.



- Once you select the document type you can proceed with entering the keyword data. Click the Index button for the first page of each document within the batch, the Append button for each subsequent page within the document.



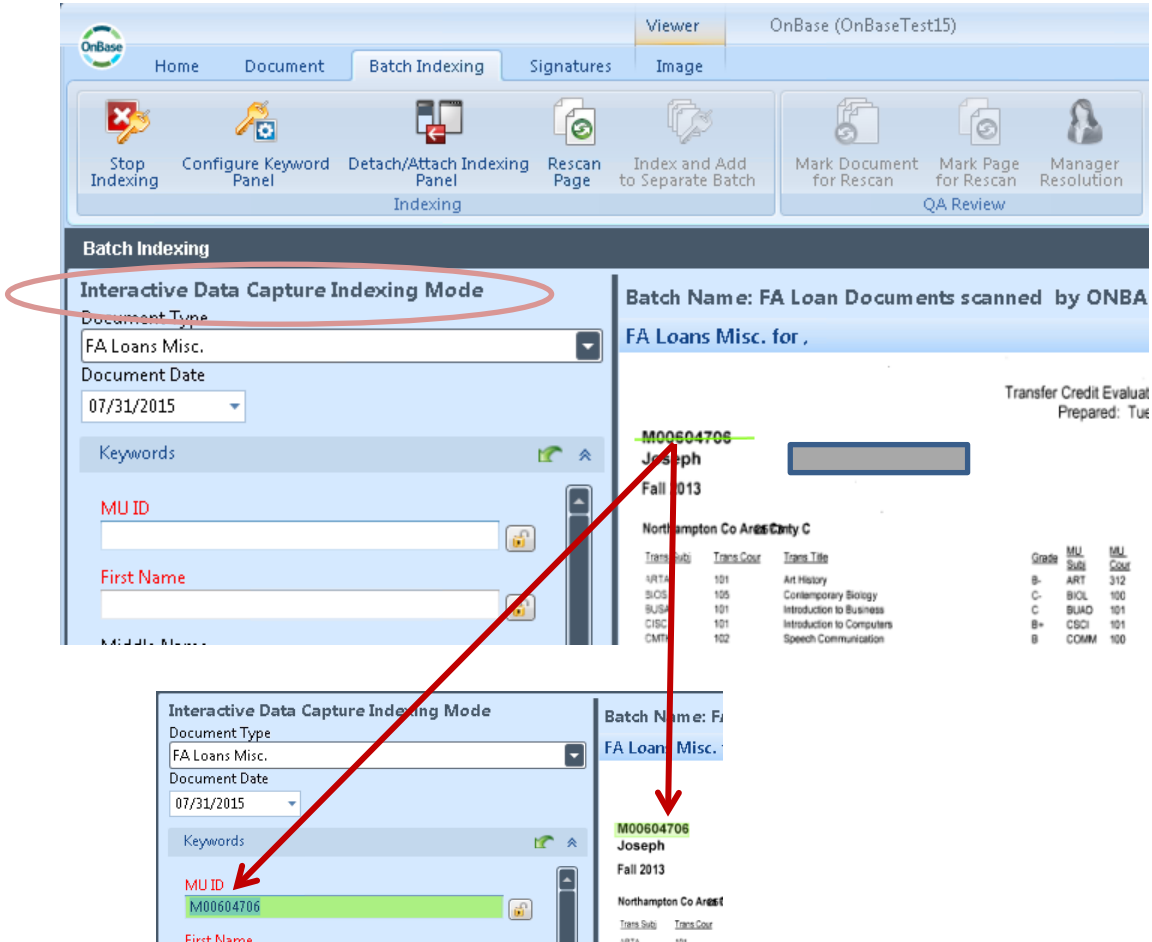
7. **Keyword Entry Made Easy → Interactive Data Capture Indexing Mode.**

Note: This works with ANY keyword on the document. This will work only with documents that are images. The text must be typed. Handwritten text is not supported.

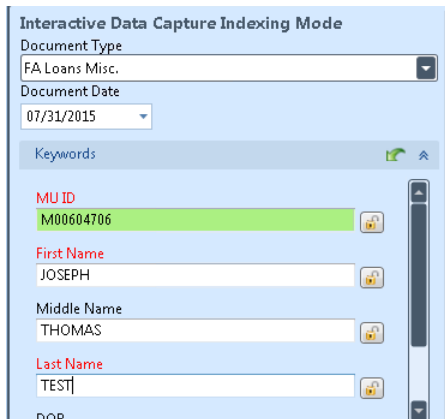
Method 1 – Using a mouse to capture the keyword

Left click and drag your mouse over the M# and it will populate in “MU ID” keyword field.

Notice the green line that you are “drawing” over the data you are capturing.



Press <Tab> and the rest of keywords will fill in.



Method 2 – Typing to capture the keyword

Type in any keyword and the Data Capture engine will try to find the value. It will give you a dropdown to choose from. If it is the top value just click Enter, otherwise select value in dropdown.

Batch Indexing

Interactive Data Capture Indexing Mode

Document Type: FA Loans Emergency
Document Date: 07/31/2015

Keywords: M

MU ID: M00604706

Batch Name: FA Loan Documents scanned by ONBASETEST2 on 7/31/2015(71867)

FA Loans Emergency for ,

Transfer Credit Evaluation from Millersville University
Prepared: Tuesday, April 23, 2013

M00604706
Joseph
Fall 2013
Northampton Co Area Cnty C

Trans Subj	Trans Cour	Trans Title	Grade	MU Subj	MU Cour	MU Title	Credit Accepted
ARTA	101	Art History	B-	ART	312	Survey of Art History	3
BIOA	106	Contemporary Biology	C-	BIO	100	General Biology	4
BUSA	101	Introduction to Business	C	BUAD	101	Introduction to Business	3
CISC	101	Introduction to Computers	B+	CSCI	101	Problem Solving with Computers	3
CMTH	102	Speech Communication	B	COMM	100	Fundamentals of Speech	3
ENGL	101	English I	C-	ENGL	110	English Composition	3
ENGL	151	English II	C+	ENGL	230	Introduction to Literature	3
ENGL	253	Creative Writing	B-	ENGL	2XX	Creative Writing	3
GEOG	210	Metereology	B+	ESCI	107	The Atmosphere	3
GEOG	210	Metereology	B+	ESCI	108	The Atmosphere Laboratory	1
HIST	113	American History I	C-	HIST	106	Contours of US History	3
HIST	153	Foundations of Modern European Hi	B+	HIST	102	Europe and World since 1815	3
MATH	120	The Nature of Mathematics	C-	MATH	100	Survey of Mathematical Ideas	3
MATH	110	Fundamentals of Algebra Theory	B+	MUSI	1X1	Fund of Music Theory	3
MUSC	253	Music Theory II	B+	MUSI	1X1	Fund of Music Theory	3
PHIL	111	On Death and Dying	A-	PHIL	280	Thanatopsis Viewing Death	3
PHIL	201	Introduction to Philosophy	B	PHIL	100	Introduction to Philosophy	3
PHIL	202	Ethics and Moral Problems	B+	PHIL	381	Ethical Theories	3
PHIL	215	Modern Philosophy	B+	PHIL	2X5	Modern Philosophy	3
PSYC	103	Introduction to Psychology	B	PSYC	100	General Psychology	3
PSYC	258	Developmental Psychology	B-	PSYC	228	Life Span Human Development	3

Credits Accepted: 99
Total Credits Accepted: 99

Interactive Data Capture Indexing Mode

Document Type: FA Loans Misc.
Document Date: 07/31/2015

Keywords:

MU ID: M00604706

Batch Name: FA Loans Misc.

M00604706
Joseph
Fall 2013
Northampton Co Area C

Click <Tab> and the rest of keywords will fill in.

Interactive Data Capture Indexing Mode

Document Type: FA Loans Misc.
Document Date: 07/31/2015

Keywords:

MU ID: M00604706

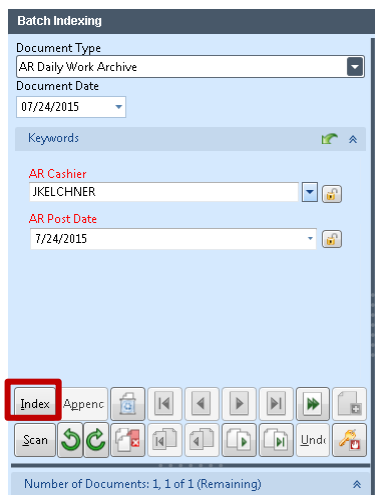
First Name: JOSEPH

Middle Name: THOMAS

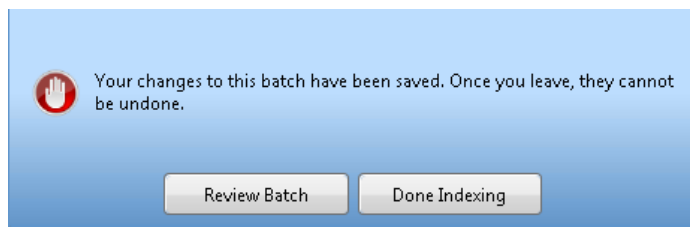
Last Name: TEST

DOB:

8. Once you are done filling out the keywords and altering the image as necessary, click Index.



9. Once you have indexed all the documents in a batch you will see the following message. When you are satisfied with your batch click “Done Indexing.”



10. Your batch has now moved to “Awaiting to Commit”.
- Batches will automatically be committed nightly. Ask your Office Leader to check batches in the committed queue weekly for accuracy and image quality.

You have completed the steps for indexing batches in OnBase Unity.