Quick Reference Guide

Batch Processing: Indexing documents in Unity

Introduction: Below are instructions on how to index batches in Unity Client. The batch must be created in the OnBase Client first.

1. Open up the OnBase Unity Client.

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

3. The Batch Processing window will open and a list of scan queues will display. Notice the key with the clock. This is the Awaiting Index queue. Click on the Awaiting Index icon to find the batch you need to work on.

2 batches are: “Awaiting to be Indexed"
4. In the Awaiting Index queue there are two batches. Highlight, Right-click on the batch that has your name on it. Select “Index Documents”.

5. Once you click on “Index Documents” you will be able to index each document in the batch. Select the document Type.
6. 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. If the image needs to be rotated click on the “Image” tab in above the ribbon menu.
8. Once you are in the Image tab you can rotate the image. **MAKE SURE YOU CLICK “Save Flip & Rotation”**

9. Once you are done indexing the last document in the batch, you will be prompted with the following pop-up window.

   ![Pop-up window]

   *Your last action(s) on Batch #17478 may be undone. Do you want to review it?
   [ ] Do not notify me again during this session.
   Yes  No*

10. Select the check box and choose “No”.

   ![Pop-up window]

   *Your last action(s) on Batch #17478 may be undone. Do you want to review it?
   [x] Do not notify me again during this session.
   Yes  No*

11. Your batch has now moved to “Awaiting to Commit”. You cannot commit your batches in Unity. Contact a user who has the ability to commit. Your OnBase Administrator can set up an automatic commit process.

   **You have completed the steps for indexing batches in the Unity Client.**