Quick Reference Guide
Batch Processing: Indexing documents in Unity

Introduction: Below are instructions on how 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.

4. Click on the Awaiting Index icon to find the batch you need to work on.

18 batches are: “Awaiting to be Indexed”
5. In the Awaiting Index queue there are two batches. Highlight, Right-click on the batch that has you want to work on. Select “Index Documents”.

6. Once you click on “Index Documents” you will be able to index each document in the batch. Select the document Type.
7. 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.
8. If the image needs to be rotated click on the “Image” tab in above the ribbon menu.

   ![Image tab](image1.png)

   **The Image tab will allow you to rotate the image if necessary**

9. Once you are in the Image tab you can rotate the image. **MAKE SURE YOU CLICK “Save Flip & Rotation”**

   ![Image tab](image2.png)
10. Once you are done filling out the Keywords and altering the image as necessary, click Index.

11. 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.”

12. 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.