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”.

There are 3 batches “Awaiting to be Indexed”
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. **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.

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