Quick Reference Guide
Scanning Documents into OnBase

Introduction: Below are instructions on how to scan documents into OnBase using the OnBase Unity Client.

1. Open the OnBase Unity Client.

![OnBase Unity](image)

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

![Batch Scanning](image)

3. Select a scan queue. In this example, you can see that several batches have been scanned into the scan queues. For example there are 4 batches scanned into the “FA Loan Documents” queue.
4. You can Pre-Index the document by selecting a doc type. This is recommended if the batch only has one document type. 
   Click “Scan”

   Pre-Index by choosing doc type – OR – leave Blank and select doc type while indexing.

5. The first time you use the scan queue, you will need to select a scan format.
6. Don’t change anything on this screen. Just click OK.

7. “Done” will be the choice you will most often make. But notice that you have many choices and your office’s workflow will dictate what step you take here.
8. Once you click “Done” in the previous step, you will see the image below. When you are done scanning the batch, click “Back” to return to “Batch Scanning”.

You have completed the steps for Scanning documents into OnBase using Unity.