Scanning and Indexing Documents Into OnBase via Disconnected Scanning

There are 3 steps to complete to get PAPER documents into OnBase:

1. SCAN the document(s)
2. INDEX the document(s)
3. UPLOAD the document(s)

**Step 1 - Scanning the Documents**

1. Log into the scan station computer
2. Click the OnBase Disconnected Scanning icon

3. Select or verify the scan settings:

   - *Scan Queue* = UG Student File
   - *Source* = Fujitsu Printer (or other)
   - *Format* = Single (for scanning a group of documents you want to be treated as individual docs) or Multiple Document (for scanning a group of documents that may contain 1 or more pages per doc)
4. Place the document(s) to be scanned in the scanner. **Note:** Document Date will default to the current date, if this is not the date you want, you can modify it.
5. Click the **SCAN** button

4. Rename the batch or leave the default name and click **OK**

5. If additional documents need to be scanned in the same batch, select **Scan More Pages**, otherwise select **Done**.
Steps 2 & 3 - Indexing/Uploading docs to OnBase

Once documents are scanned, they need to be indexed with keywords and uploaded so they can be retrieved from OnBase. You have two options at this point for indexing/uploading docs to Onbase:

**OPTION 1: Index and Upload to OnBase via Disconnected Scanning**

You can INDEX and UPLOAD the documents right here in the Disconnected Scanning window.

1. You should see the scanned batch of items in the AWAITING INDEX queue
   Expand this queue by clicking on the + sign next to it
2. **RIGHT-CLICK** on the batch and select **INDEX BATCH**

![Image of scanning and indexing interface]

3. The first document to index should display in the viewer window to the right.

![Testing document in viewer window]
4. **Select the Document Type** for this document from the drop down.
5. Once the doc type is selected, a list of keywords associated with that Document Type will be displayed. Note: These are the keywords that will be used when searching/retrieving documents in OnBase.

6. Type in the student’s NDID and click TAB. Other keyword fields should auto-fill. Verify this information is correct. Note: It is not necessary to fill in other keyword fields, unless they are REQUIRED.

7. Click on the INDEX button
8. That document is now indexed and the next document in the batch should display. Continue this process for each document in the batch, ensuring you change the **Document Type** as necessary.

**NOTE:** If a document in the batch is **MULTIPLE PAGES**, hit the **APPEND** button next to the index button to append that page to the first page of the document. Continue to click **APPEND** as each additional page is displayed for that document.

9. Once all docs are indexed in the batch, the batch will move to the **FULLY INDEXED QUEUE**.

10. From the **FULLY INDEXED** queue, we can now **UPLOAD** the batch into OnBase. **EXPAND** the queue and **RIGHT CLICK** on the batch. Select **UPLOAD BATCH**

11. The system will show the progress of the upload in the bottom pane of the screen as shown below. You should receive confirmation when the batch has uploaded successfully. Once uploaded the batch will be removed from the Fully Index queue.
These documents are now stored in Onbase and available for retrieval
OPTION 2: Upload a scanned batch and index via the Unity Client

After your documents are scanned and sitting in the AWAITING INDEX queue, you can upload the batch into OnBase now and then index the batch within the Unity Client. 

*Note: documents will not be available for retrieval in Onbase until they have been fully indexed.*

1. From the AWAITING INDEX queue, **EXPAND** the queue by clicking on the + sign next to it

2. **RIGHT-CLICK** on the batch and select **UPLOAD BATCH**
3. You will receive a Warning Message

![Verify Operation](image)

4. Select YES

5. The system will show the progress of the upload in the bottom pane of the screen as shown below and you should receive confirmation when the batch has uploaded successfully. Once uploaded the batch will be removed from the Awaiting Index Queue

![Upload progress](image)

6. Now the batch may be indexed via the Unity Client. Refer to instructions: **Indexing via the Unity Client.**
Indexing via the Unity Client

1. Open the **Hyland Unity Client** (OnBase icon) via the desktop shortcut.

2. Select **Home** tab and click the **Scan Batch Processing** button.

3. Select the **AWAITING INDEX QUEUE**
4. A list of batches you have access to will be displayed in the panel to the right. Select the batch you wish to index by **RIGHT CLICKING** on it.

5. **Select Index Documents**
6. The first document to be indexed should display in the panel to the right. **Select the Document Type** from the drop down. *Note: the Document Date will default to the current date but can be changed if needed.*

7. Once the doc type is selected, a list of keywords associated with that Document Type will be displayed. *Note: These keywords are used when searching/retrieving documents in OnBase.*
8. **Type in the student’s NDID** and hit **TAB**. The rest of the information should auto-fill. Verify the information is correct. Note: It’s not necessary to fill in other keyword fields, unless they are REQUIRED.

9. Click **INDEX** button below the keyword section

10. That document is now indexed and the next document in the batch should display in the viewer. Continue this process for each document in the batch, ensuring you change the **Document Type** as necessary.
NOTE: If a document in the batch is MULTIPLE PAGES, click the APPEND button next to the Index button to append that page to the first page of the document. Continue to click APPEND as each additional page is displayed for that document.

11. If you are in the middle of indexing a batch and need to stop before completion, Click the Stop Indexing button on the ribbon bar.

12. To begin indexing the batch again, select the INDEX IN PROGRESS queue.
**Sweeping docs into Onbase**

To Index/Upload a batch of *electronic* documents to Onbase

1. Create a “sweep” directory on your computer/network, i.e., C:\Onbase Sweep
2. Copy/Cut/Paste the docs you want to upload into this directory
3. Change the **SOURCE** to *Sweep* from the drop down
4. Change the **FORMAT** to *Sweep Scan (or whatever yours is called)* from the drop down
5. Click the **SCAN** button
6. Rename the Batch, if desired and select **OK**

7. You’ll be prompted to enter the directory you created in Step 1 above, use the **BROWSE** button to locate it.

8. To upload *ALL* documents in this directory, insert a wildcard *.* in the **FILENAME** field

9. Click **OK**

10. Your batch should now appear in the **AWAITING INDEX** queue and are ready to be indexed/uploaded. Refer to instructions above **Indexing/Uploading Docs into Onbase**.