



University of Colorado

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OnBase Guide - Scan Queue - Auto Sweep Setup

Goal: To create an automated and scheduled sweep into a scan queue.

Complexity Level: Departmental Administrative Users

8/15/2023

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Background

Sweeps to OnBase scan queues can be performed manually by users, or can be scheduled to create batches without user interaction.

Prerequisites

- You must have full local administrator access to the machine to perform this installation. If you do not have this access, please ask your local IT staff for support.
- The account running the Windows Service (see page 6) must also be set up to have the “Log on as a Service” right attached to it for the computer the service is running on. You can see how to modify the account to have that permission by following the steps [here](#).
- Before you set up your scheduled sweep, you need to configure the scan queue. This guide does not cover scan queue configuration details; refer to the Document Imaging MRG for additional information if needed.
- The workstation performing scheduled processing needs to be licensed with a Production Document Imaging license. Contact UIS_DM_Support@cu.edu for assistance if you do not already have a license applied. You will need to log in to OnBase from the workstation at least once so that it appears in the list to be licensed.
- If you are using a new OnBase account to run the scheduled process, log into any OnBase client using that account at least once. New accounts are required to have their password reset the first time they are used. If the first logon attempt is through the service, the login will fail.

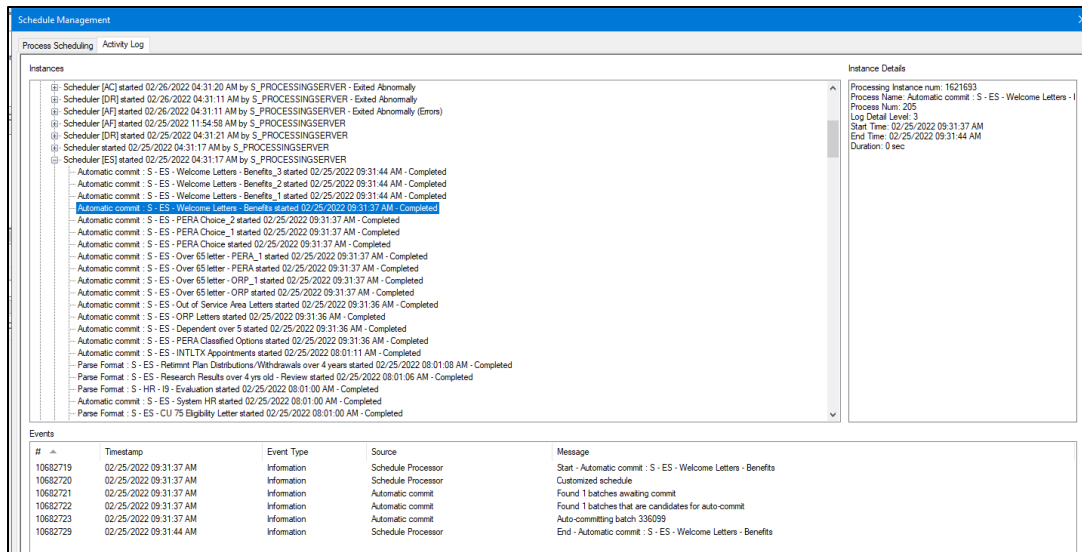
Resources

Document Imaging MRG has further information on scan queue configuration and scheduling capture processing.

Contact UIS_DM_Support@cu.edu for assistance.

When troubleshooting, information on scheduled processing is available in the Thick client. Go to Processing > Scheduler > Schedule Management > Activity Log. Find the relevant workstation in the list and click to expand. A new entry will be listed for

each time the service was started. Information about files found or errors encountered will be available here.



Environments and Refreshes

It is important to consider how our refresh schedule will affect configuration of your scheduled processes, especially when using the same workstation to configure and test the processes and later running the processes in production.

UIS will make attempts to disable processes from running in non-production after a refresh, but this will rely on regularly [restarting the service](#).

Install OnBase Configuration, the OnBase Thick client and Oracle client

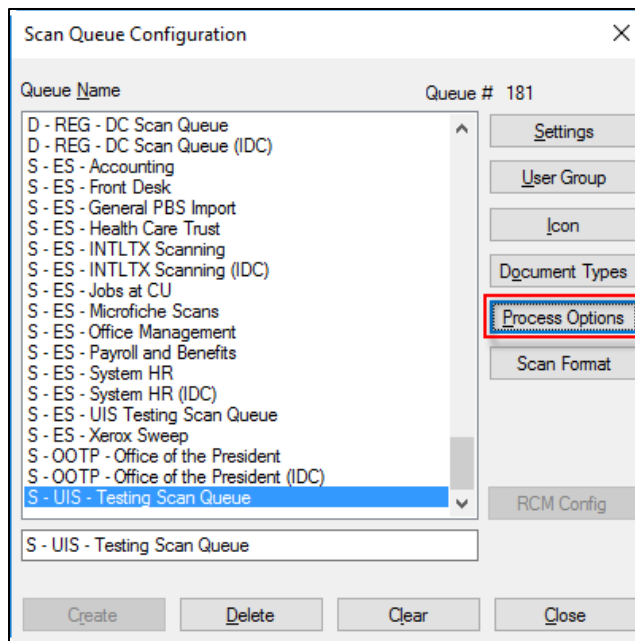
Refer to the [Client guides](#) for installation instructions.

You will need to use Configuration for some steps, but Configuration does not need to be installed on the workstation running the auto-sweep process.

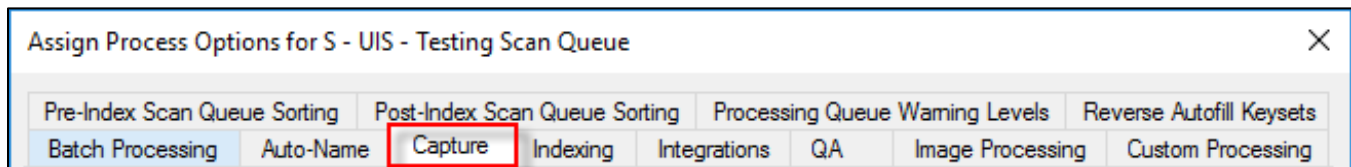
The Thick client (and therefore the Oracle ODBC client) does need to be installed on the workstation running the auto-sweep process.

Scan Queue Configuration

Once you have created the scan queue that you want to sweep into, within OnBase Configuration, go to the **Process Options** menu.



Then select the **Capture** tab.



Input the default location you want to sweep from in the **Default Sweep/Scan from Disk Directory** field. If the folder is a shared folder on a network, do not use the lettered drive, but the full path (e.g. not “E:\OnBase_documents” but \\basic.location.cu.edu\OnBase_documents).

Default Sweep/Scan from Disk Directory
 \\basic.location.cu.edu\OnBase_documents

Sweep Options

Include Sub-folders One Document Per Folder
 Delete Disk Files Break Batches by Second Level Folder
 Delete Folders Full-Index Documents
 Images Only

Scan from Disk Options

Allow Scan More Pages from Disk

Bar Code Process

<None>

Clear Keywords for Folder Audible Bar Code Feedback
 Revert to Initial Document Type If No Document Type Bar Code Processed
 Prevent Manual Index Selection of Default Document Type
 Stop Scanner on Consecutive Bar Code Separator Sheets

Unique Bar Code Keyword Match

No Append
 Append Page Only
 Append Entire Document
 Only Match in Same Batch
 Append new page(s) to beginning

Misc Options

Invert Images
 Reset Scan Format After Scan
 Use Document Type File Format
 Prevent Autofills at Scan Time

Page Separation

Blank Threshold 0 Bytes

Separate on Blank Page
 Discard Blank Page
 Maintain & Suppress Blank Pages
 Separate on Patch Code Page
 Discard Patch Code Page
 Discard Back of Patch Code Page
 Exclude Types

Automatic Scan More Queue
 Scan More Pages Default Location
 Start of Document
 Before Selected Page
 After Selected Page
 End of Document
 Always Show Dialog

Endorsing / Imprinting

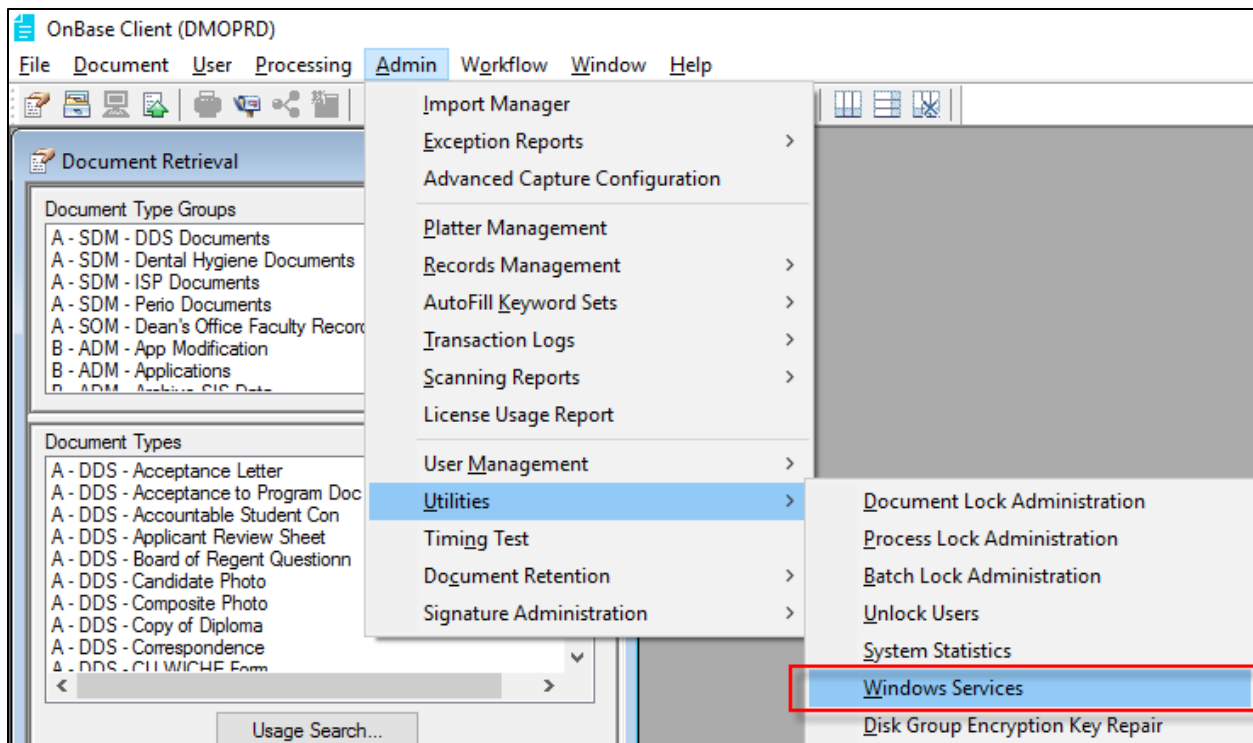
Auto Endorse Pages
 Auto Kodak Imprinter
 Extended Numbering System

Set Up Windows Service

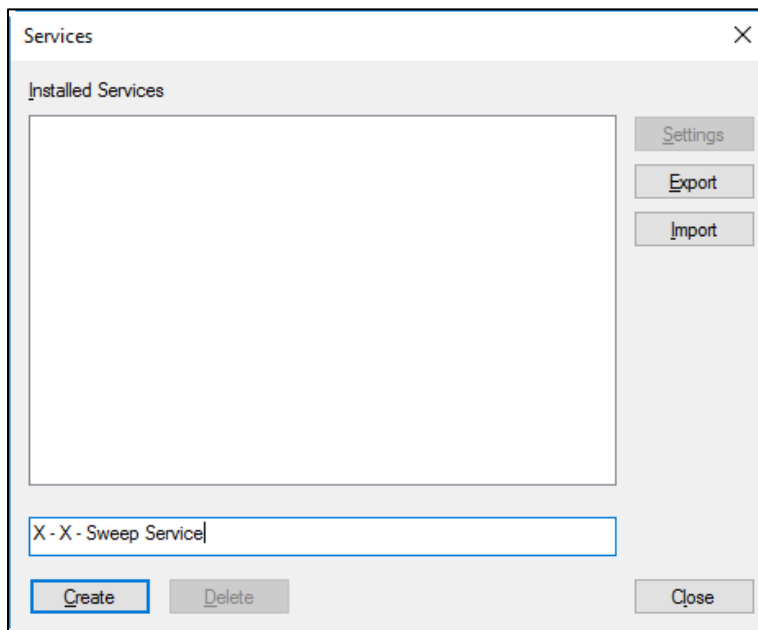
On the workstation that will be doing the auto-sweep processing, launch the Thick Client as **Admin** by right-clicking on the shortcut and choosing **Run as administrator**.



In the menu, go to **Admin > Utilities > Windows Services**.



Type the name of your new service and click the **Create** button.



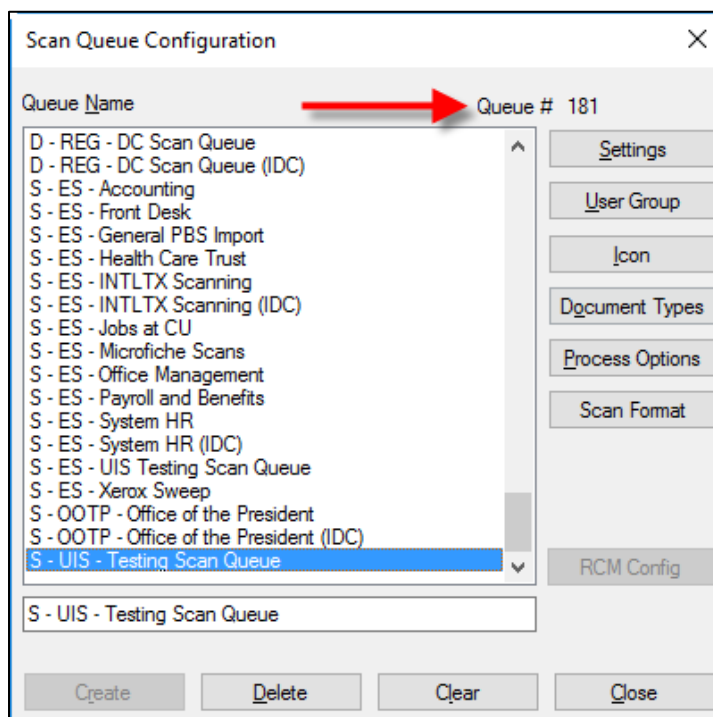
Fill out the **Service Configuration – Service Settings** fields with the appropriate data.

- Service Description: Auto Sweep
- Executable Path: C:\Program Files (x86)\Hyland\OnBase Client\obcInt32.exe (or your Thick Client's program file (.exe) if it's different from this)
- Start Type: Automatic
- User Name*: [OnBase user name / Operator ID]

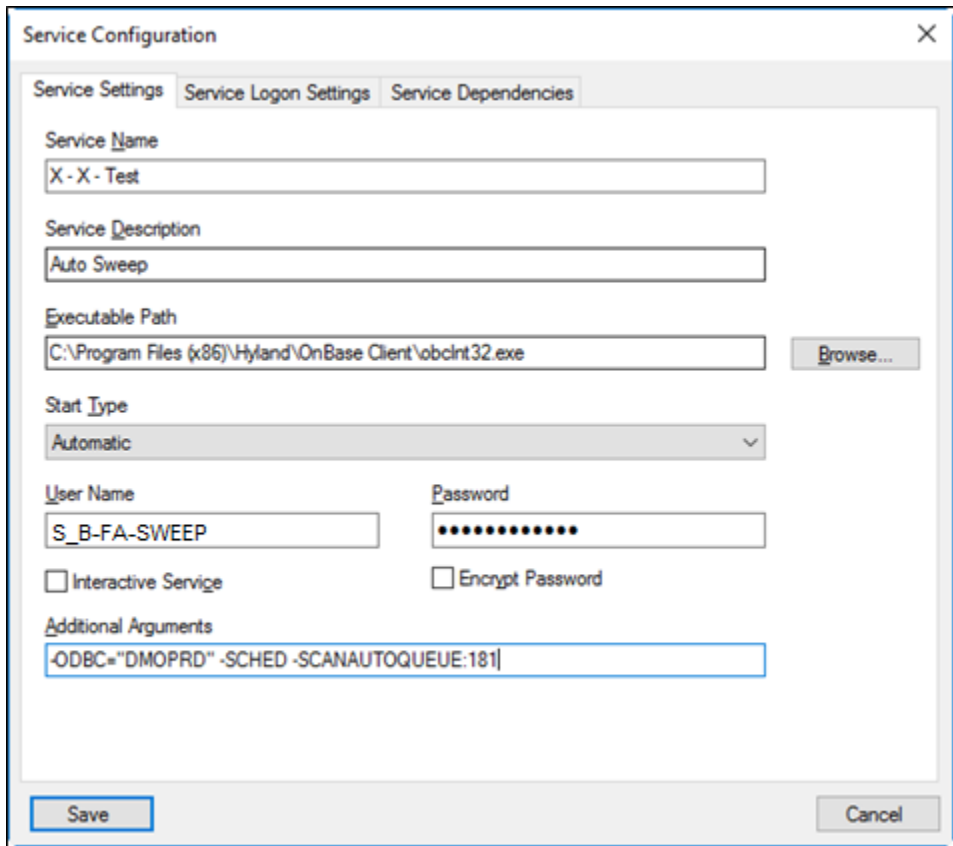
- Password*: [OnBase password for the account being used]
- Encrypt Password: [leave unmarked]
- Additional Arguments*:
-ODBC="DMOPRD" -SCHED -SCANAUTOQUEUE :###

***NOTES*:**

- It is **strongly recommended** that you use a service account instead of an actual user account. This can make it easier to audit any actions related to this action and ensure continuity as staffing changes. OnBase service accounts for this purpose should:
 - Follow the established naming convention, ex: S_B-ADM-DIP, S_B-FA-SWEEP
 - Be in the following user groups:
 - Functional – Lvl 2 – Standard Users
 - The “Scan Queue” group(s) associated with the document type/import process.
 - The “User Group” group(s) needed for create access to the document type(s)
- Be careful if you copy and paste the Additional Arguments above to verify the quotes are correct.
- Be sure to enter the correct environment name (DMOPRD, DMOSTG, DMOTST, DMODEV) in Additional Arguments.
- The pound signs in Additional Arguments should be replaced with the scan queue number of the scan queue you built for this process. It can be found in the upper right-hand corner of the configuration window of the scan queue.

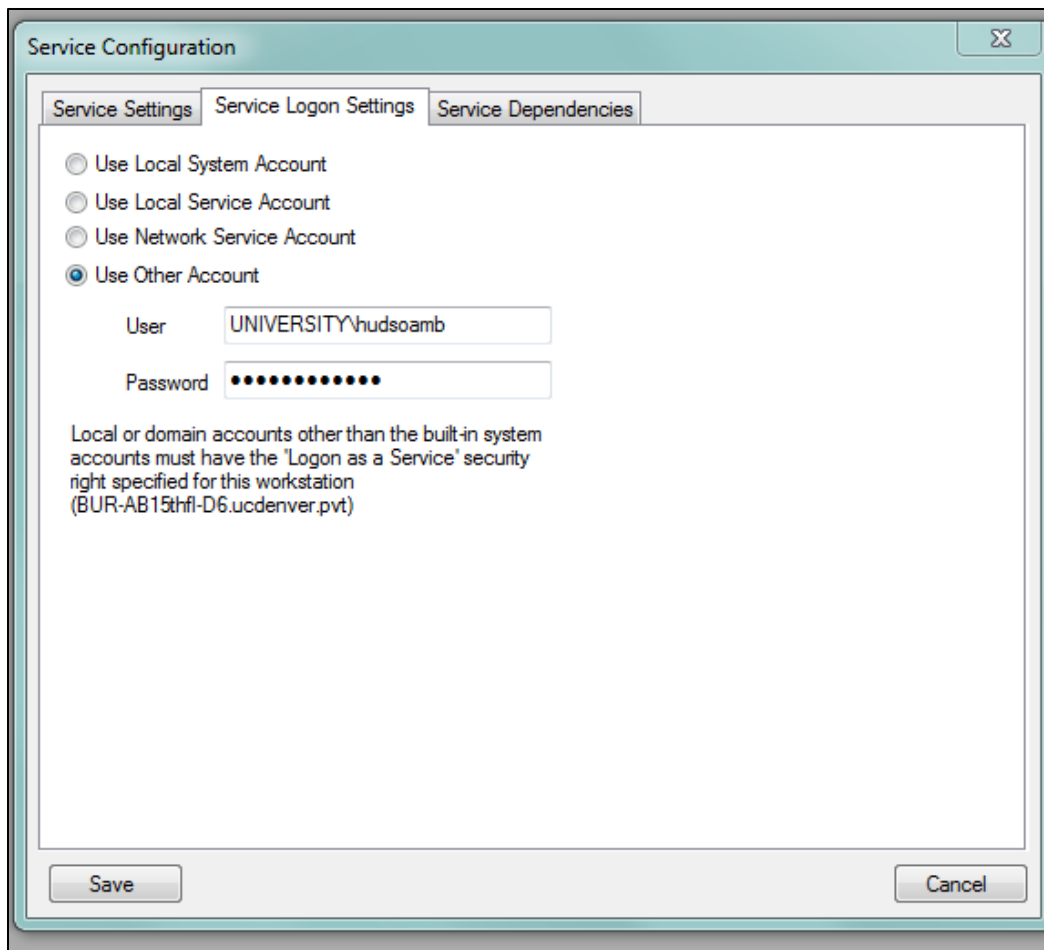


The completed “Service Settings” tab configuration should look like this:



Go to the **Service Logon Settings** tab. Select the “Use Other Account” option. You will need to use an account that has access to the location your scan queue will sweep from. Again, this account must have the “Log on as a Service” right or the service will not start.

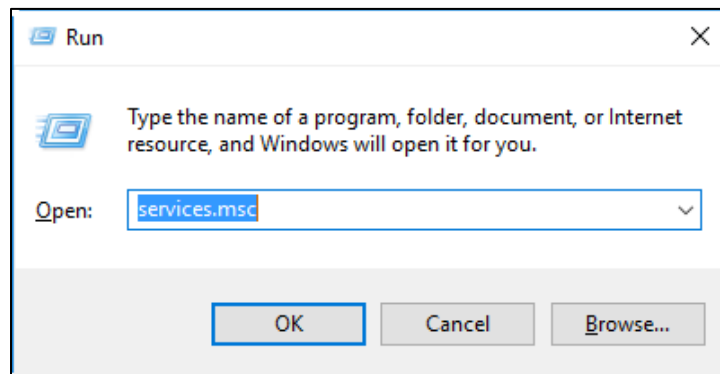




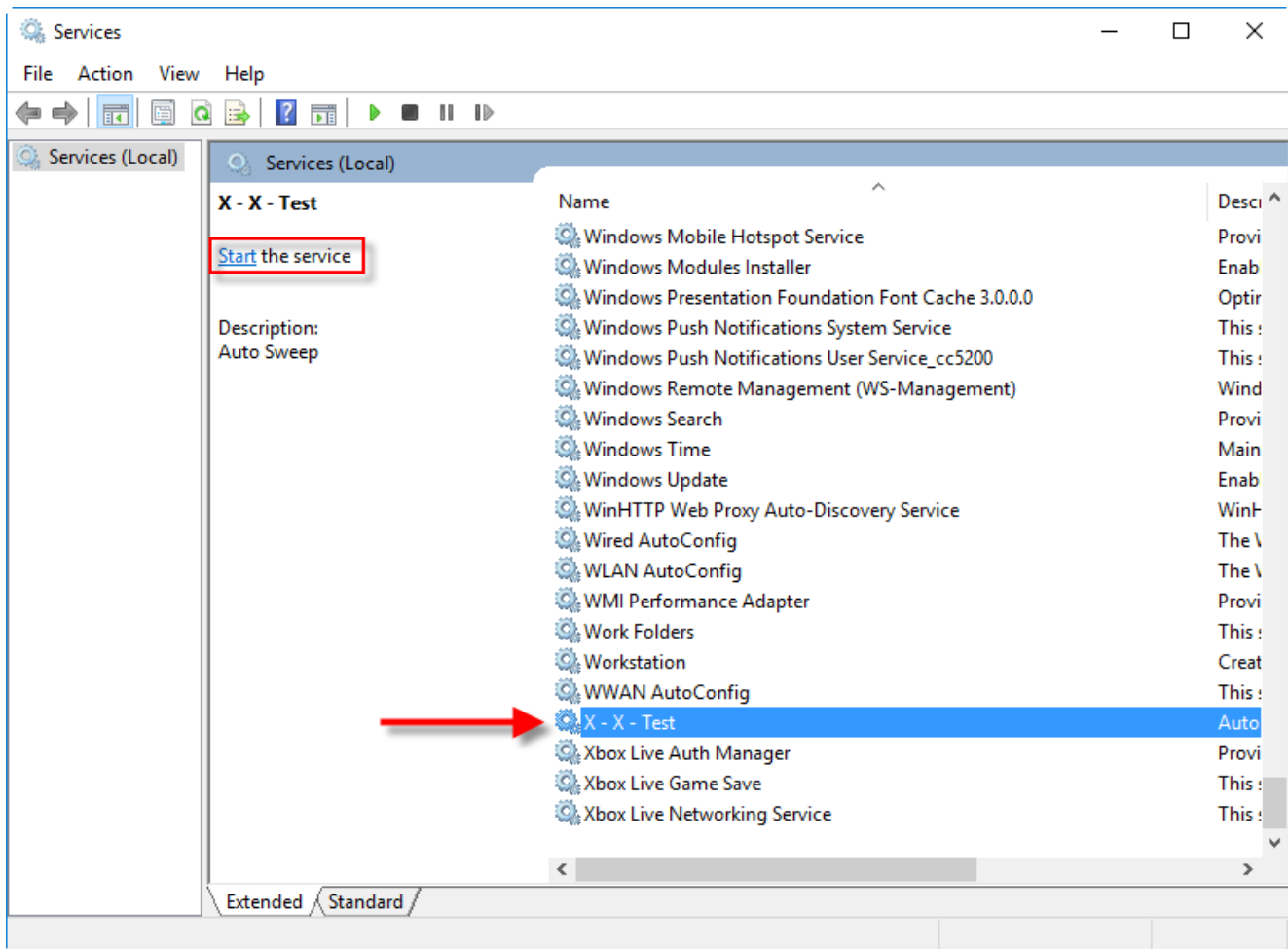
You do not need to change any settings in the **Service Dependencies** tab.

Start the Windows Service & Set Recovery Options

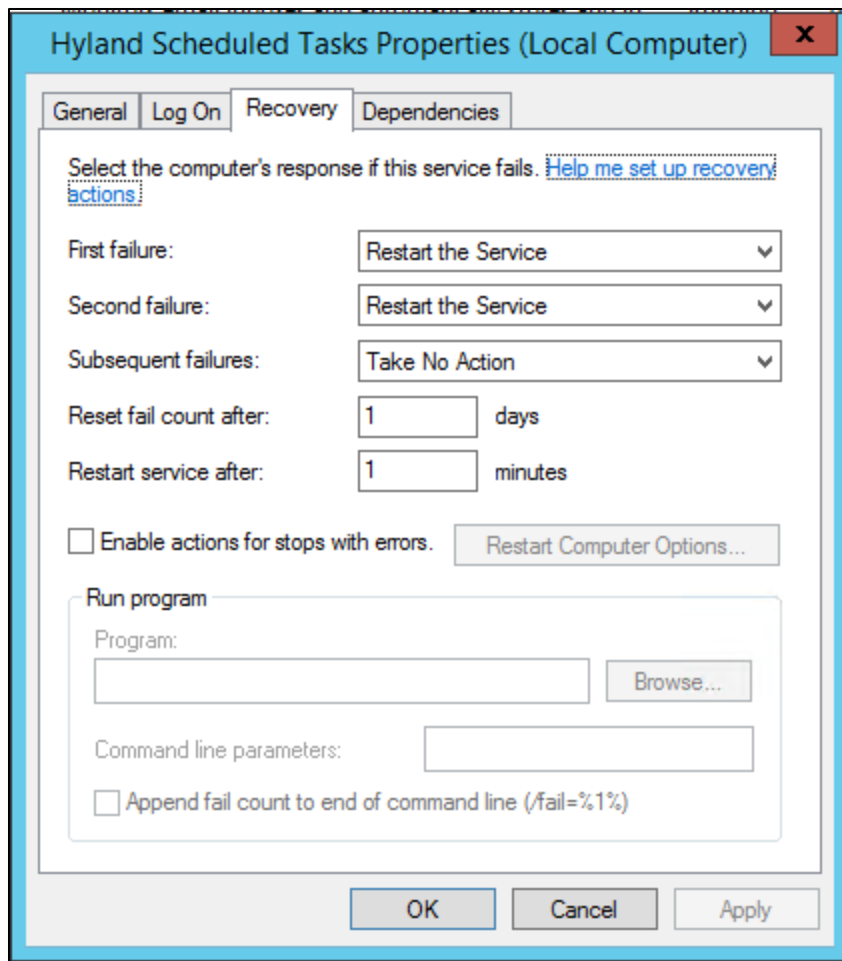
Open the "Run" dialogue by pressing the Windows Key (⊞) + R. Then type "services.msc" and press **Enter** or click **OK**.



Scroll through the list and find the service with the same name as the OnBase service you just set up. Click it and click **Start** in "Start the Service."



Right click the service name and choose **Properties**. Go to the **Recovery** tab and choose “Restart the Service” for **First failure** and **Second failure**. Set the **Reset fail count after** option to 1 day.



You may close the services window.

Note about Resetting the Service

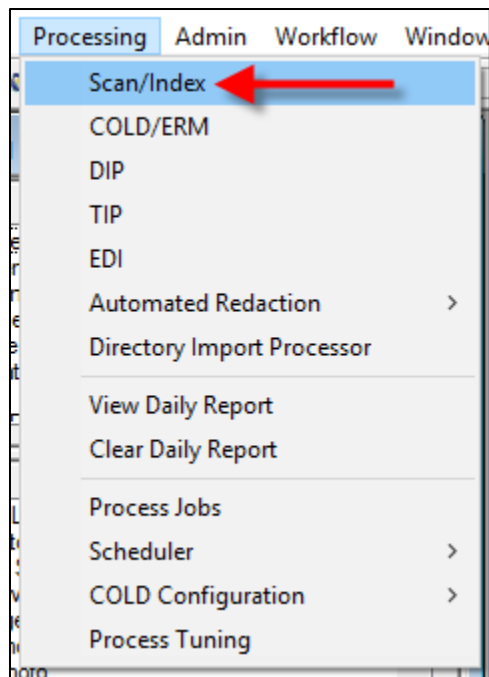
To avoid any issues, the service should be restarted daily. You may contact your campus OIT if you need help setting that up. This can be accomplished with Windows Task Scheduler.

If the service is not restarted, it will not recognize any changes made to the configuration since the last time the service started. Restarting the service ensures that current configuration is used and provides better reliability.

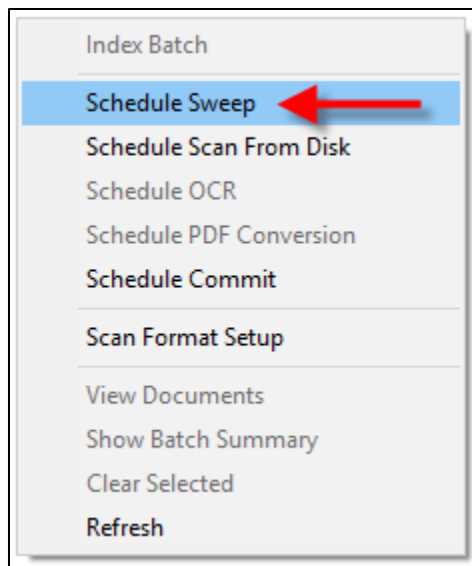
Set up OnBase Schedule for Service

Go back to the Thick Client. Click the **Processing** menu option, then **Scan/Index**.

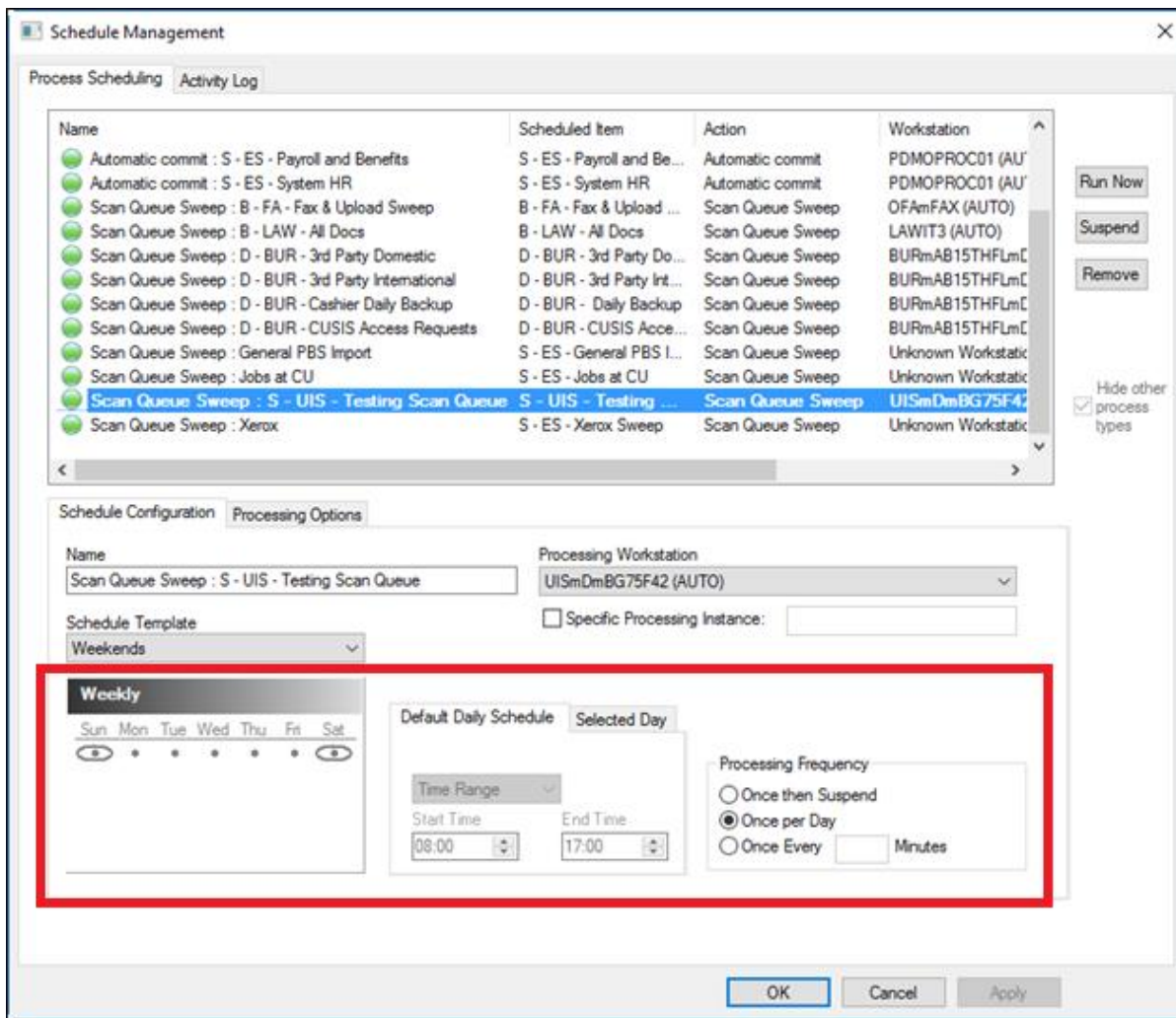




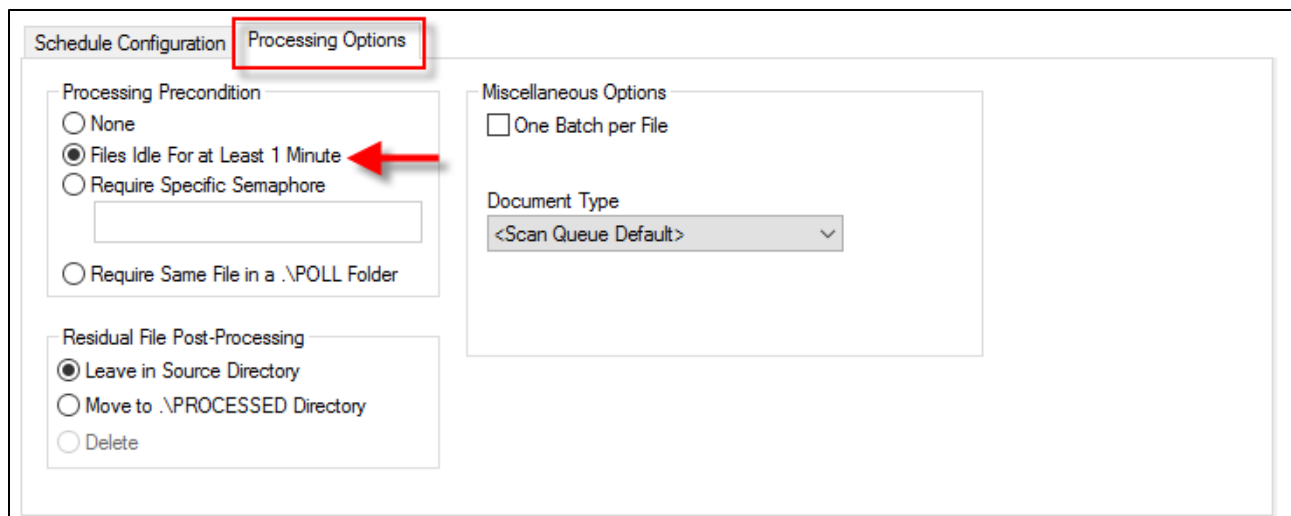
Scroll through the list and double-click the scan queue that you set up with the service earlier. Right-click in the empty space on the right and select **Schedule Sweep** from the menu that appears.



In the **Schedule Configuration** tab, set up your schedule (what days you want to have the process run and how often you want it to run). Do not change the **Name** or **Processing Workstation** fields.



Click on the **Processing Options** tab. Within the **Processing Precondition**, select the “None” option, unless there is a specific need to choose “Files Idle for at least 1 minute.”



Click **OK**.

As long as the Windows service is running, the sweep will be processed according to the schedule defined here.

NOTE: If you enable the “Files Idle For at Least 1 Minute” option, ensure you also do NOT have the “Once per Day” Processing Frequency option selected. These two options conflict with each other and your sweep may not perform correctly. You will want to select the “Once Every Minutes” option on the Schedule Configuration tab.