OnBase Guide - Scan Queue - Auto Sweep Setup

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

**Complexity Level:** Departmental Administrative Users

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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.

Contact UIS_DM_Support@cu.edu for assistance.

Install OnBase Configuration, the OnBase Thick client and Oracle client
Refer to the Client guides for installation instructions.

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).
Set Up OnBase Service

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\obclnt32.exe (or your Thick Client’s program file (.exe) if it’s different from this)
- Start Type: Automatic
- User Name*: [your OnBase user name / Operator ID]
• Password*: [your OnBase password]
• Encrypt Password: [leave unmarked]
• Additional Arguments*: -ODBC=”DM0PRD” –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:
  o Follow the established naming convention, ex: S_B-ADM-DIP, S_B-FA-SWEEP
  o 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.
• 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.

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### 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.

Set up 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.

**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.

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**Note about Resetting the Service**

To avoid any issues with your service running and production maintenance windows, we suggest setting up a scheduled task to restart the service every night. You may contact your campus OIT if you need help setting that up.