



# **OnBase Guide – Scheduled DIP/DRIP**

**Goal:** To create schedule DIP/DRIP processes.

**Complexity Level:** Departmental Administrative Users

8/15/2023

# **Table of Contents**

Background	3
Prerequisites	3
Resources	3
Environments and Refreshes	4
Install the OnBase Thick client and Oracle client	4
Set Up OnBase Service	4
Start the Windows Service & Set Recovery Options	9
Note about Resetting the Service 1	10
Set up Schedule for DIP/DRIP Service 1	10
Scheduling Commit of Batches 1	13



## Background

DIP (Document Import Processor) and DRIP (Directory Import Processor) are import methods that use information from an index file (DIP) or file/folder structure (DRIP) to automate document indexing.

## 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 workstation performing scheduled processing needs to be licensed with the correct DIP or DRIP license. These licenses are limited, so contact <u>UIS\_DM\_Support@cu.edu</u> 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.
- 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 <u>here</u>.
- You must know how to create/configure a DIP (Document Import Processor), DRIP (Directory Import Processor) or COLD import.
  - Configure the DIP or DRIP process in Configuration.
  - Once that is complete and the process is working as desired, you can use this service to automate the import.
- 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

Refer to the DIP or DRIP MRGs for additional information if needed.

Contact <u>UIS\_DM\_Support@cu.edu</u> for assistance.



## **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 <u>restarting the service</u>.

#### Install the OnBase Thick client and Oracle client

Refer to the <u>Client guides</u> 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) <u>does</u> need to be installed on the workstation running the auto-sweep process.

#### Set Up OnBase Service

Launch the OnBase Thick Client **as Admin** by right-clicking on the shortcut and choosing **Run as administrator**. This is necessary in order create the Windows service.



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



📒 OnBase Client (DMOPRD)			
<u>File D</u> ocument <u>U</u> ser <u>P</u> rocessing	<u>Admin</u> Workflow <u>W</u> indow <u>H</u> elp		
🚰 🔜 🖳 🚔 👘 👘	Import Manager	1	
🚰 Document Retrieval	<u>Exception Reports</u> Advanced Capture Configuration	``	
Document Type Groups A - SDM - DDS Documents	<u>P</u> latter Management		
A - SDM - Dental Hygiene Documents A - SDM - ISP Documents	<u>R</u> ecords Management	>	
A - SDM - Perio Documents	AutoFill Keyword Sets	>	
A - SOM - Dean's Office Faculty Record B - ADM - App Modification	Transaction Logs	>	
B - ADM - Applications	Scanning Reports	>	
	License Usage Report		
A - DDS - Acceptance Letter	User <u>M</u> anagement	>	
A - DDS - Acceptance to Program Doc A - DDS - Accountable Student Con	<u>U</u> tilities	>	Document Lock Administration
A - DDS - Applicant Review Sheet	Timi <u>ng</u> Test		Process Lock Administration
A - DDS - Board of Regent Questionn A - DDS - Candidate Photo	Document Retention	>	Batch Lock Administration
A - DDS - Composite Photo A - DDS - Copy of Diploma	Signature Administration	>	<u>U</u> nlock Users
A - DDS - Correspondence	~ <b>.</b>		System Statistics
<	>	1	<u>W</u> indows Services
Usage Search.			Disk Group Encryption Key Repair

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

Services	×
Installed Services	
	<u>S</u> ettings
	<u>E</u> xport
	<u>I</u> mport
OnBase Thick Client Import Service	
<u>C</u> reate <u>D</u> elete	Close

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



- Service Description: Scheduled Import
- 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\*: [OnBase user name / Operator ID]
- Password\*: [OnBase password]
- Encrypt Password: [leave unmarked]
- Additional Arguments\*: -ODBC="DMOPRD" –SCHED

#### \*NOTES\*:

- It is <u>strongly recommended</u> 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 DIP/DRIP/COLD
    - Functional Lvl 2 Standard Users
    - 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 completed "Service Settings" tab configuration should look like this:



Service Configure	ation		×
Service Settings	Service Logon Settings	Service Dependencies	
Service Name			
OnBase Thick (	Client Import Service		
Service Descript	tion		
Scheduled Imp	ort		
Executable Path	ı		
C:\Program File	s (x86)\Hyland\OnBase C	lient\obclnt32.exe	Browse
Start Type			
Automatic		~	
User Name		Password	
S_B-ADM-DIP		•••••	
		Encrypt Password	
Additional Argun	nents		
-ODBC="DMOT	TST" -SCHED		
Save			Cancel



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 where your content lives. Again, this account must have the "Log on as a Service" right or the service will not start.

Service Configuration	X
Service Settings Service Logon Settings Service Dependencies	
Use Local System Account	
O Use Local Service Account	
Use Network Service Account	
Use Other Account	
User UNIVERSITY\hudsoamb	
Password ••••••••	
Local or domain accounts other than the built-in system accounts must have the 'Logon as a Service' security right specified for this workstation (BUR-AB15thfl-D6.ucdenver.pvt)	
Save	ancel

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

![](_page_7_Picture_3.jpeg)

#### 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**.

🗐 Run	×
٨	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.
<u>O</u> pen:	services.msc ~
	OK Cancel <u>B</u> rowse

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."

O. Services (Local)					
OnBase Thick Client Import Service	Name	Description	Status	Startup Type	Log On As
Start the service	Average Store Interface Ser	This service Saves install	Running	Automatic Manual	Local Service Local Syste
	🎑 Offline Files	The Offline	Running	Automatic (T	Local Syste
Description:	🖏 OnBase Thick Client Import	Scheduled I		Automatic	Local Syste
Scheduled Import	🧟 OpenSSH Authentication A	Agent to ho		Manual	Local Syste
	🎑 Optimize drives	Helps the c		Manual	Local Syste
	🎑 Parental Controls	Enforces pa		Manual	Local Syste

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.

![](_page_8_Picture_6.jpeg)

Hyland Scheduled Tas	ks Properties (Local Computer)	x
General Log On Recovery	Dependencies	
Select the computer's responsed to the computer's response	se if this service fails. <u>Help me set up recovery</u>	
First failure:	Restart the Service 🗸	
Second failure:	Restart the Service 🗸	
Subsequent failures:	Take No Action 🗸	
Reset fail count after:	1 days	
Restart service after:	1 minutes	
Enable actions for stops w	vith errors. Restart Computer Options	
- Run program		
Program:	Browse	
Command line parameters:		
Append fail count to en	d of command line (/fail=%1%)	
	OK Cancel Apply	

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 Schedule for DIP/DRIP Service

In the Thick client, choose the **Processing** menu option, then either **DIP** or **Directory Import Processor** (DRIP).

![](_page_9_Picture_7.jpeg)

🗧 OnBase Client (dmotst	) Test System - Not For Production Use
File Document User	Processing Admin Workflow Window Help
< 8 🛛 1 🖨 🗅	Scan/Index
50	COLD/ERM
Document Retrieva	DIP
Document Type Groups	TIP
A - CCDSMC - Documer A - CON - Academic Cor	EDI
A - CON - Course Docur	Automated Redaction >
A - CON - Human Reso.	Directory Import Processor
A - CON - Standing Com A - CON - Tuition Docun	View Daily Report
	Clear Daily Report
Document Types A - CCDSMC - Audit Not	Process Jobs

Right-click the desired import process in the list, and select **Schedule Format** from the menu that appears.

😔 DIP Queue			
	Process Formats		
DIP Format	Process Format	Pathname	Filename
Process Job	🚰 >>System Bitmap and Icon Importer	A:\	IMPORT.TXT
Awaiting Commit	B - ADM - CEADM	D:\Applications\OnBase_D	index.txt
Committed		D:\Applications\OnBase_D	index.txt
Scheduled Processes		D:\Applications\OnBase_D	index.txt
	B - ADM - UGRAD Transcripts Official	D:\Applications\OnBase_D	index.txt
	B - AST - Svllabi Import	D. v ppilodiona (on base_D	index.tet
	B - FA - E-Form - Execute Workflow	\\ofa-fax.int.colorado.edu\	B-FA-DIP_Index_File
	B - GSS - Document Import	C:\BUS_DEV\GraduateSc	index.csv
	B - HR - Avature Import	D:\Avature\AvatureDIP\	merged.csv
	🚰 B - HR - Offer Letter Import	C:\Users\bus-dev\Desktop	DIP.csv
	🚰 B - HR - Position Description Archive	C:\Users\bus-dev\Desktop	DIP.csv
	B - REG - PRC Removal	F:\Singularity Conversion\P	PRC.txt
	D - ADM - Slate CU Succeed	I:\UploadFiles\SlateCUSuc	index.txt
	D - ADM - Slate Reg Upload	I:\UploadFiles\SlateReg\	index.txt
	D - ADM - Slate Upload	I:\UploadFiles\Slate\	index.txt
	S - ES - 1042-S Import	\\ad.cu.edu\fs\Scratch\Int	.txt
	Construction DIP Process	Vad.cu.edu vis Vocratich Vo	index tot
	Reference of Process	tion DIP	export csv
	Schedule Forma	at	export.cov
	Schedule Comr	nit	
	Clear Selected		
	Refresh		

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 field. The **Processing Workstation** should be the name of the machine running the service.

![](_page_10_Picture_4.jpeg)

Name Parse Format : X - X - Retention Test	Processing Workstation UISmLm39RT6S2 (AUTO)	
Schedule Template <custom schedule=""> Weekly Sun Mon Tue Wed Thu Fri Sat • • • • • • • • • •</custom>	□ Specific Processing Instance:         Default Daily Schedule       Selected Day         Time Range       Processing Frequency         Start Time       End Time         08:00       17:00         Image       Image         Image       Image         Once Every       180         Image       Image	

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." Select any other desired options.

Processing Precondition	Miscellaneous Options	
None	One Batch per File	
○ Files Idle For at Least 1 Minute ○ Require Specific Semaphore	Report if No Files Found	
○ Require Same File in a .\POLL Folder		
Residual File Post-Processing		
CLeave in Source Directory		
Move to .\PROCESSED Directory		

#### Click Apply.

**NOTE**: If you enable the "Files Idle For at Least 1 Minute" option, ensure you also do <u>NOT</u> 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  $\Box$  Minutes" option on the Schedule Configuration tab.

![](_page_11_Picture_5.jpeg)

## **Scheduling Commit of Batches**

Batches created through this process will still need to be committed. This can be done manually in the Thick client:

Processing > DIP/DRIP > Awaiting Commit > right click on batch > Commit Selected

nent ivde Groups				
and the second s				
	Processed Batch	es		
Porest International Advantage of the second s	Batch #	Batch Name	Parse Date - Time	Item Date
	296065	B - FM - Space Optimization MOU - V2	2020-03-09 07:00:56	2020-03-09
	296385	B - FM - Space Optimization MOU - V2	2020-03-10 07:01:09	2020-03-10
	296558	B - FM - S	2020-03-11 07:01:05	2020-03-11
	D 296778	B - FM - S Commit Selected	2020-03-12 07:01:28	2020-03-12
	297056	B - FM - Sp Allow Scheduled Commit	2020-03-13 07:00:06	2020-03-13
	[j] 29/206	B - FM - Sp View Verification Report	2020-03-14 07:00:34	2020-03-14
	[[ <sup>m</sup> ] 29/214	B - FM - Sp	2020-03-15 07:01:08	2020-03-15

Or it can be scheduled.

Processing > DIP > DIP Format > right click on Process Format > Schedule Commit -or-

Processing > DRIP > DRIP Formats > right click on Process Format > Schedule Commit

From here the steps are basically the same as described above for scheduling the import. You'll choose the appropriate schedule and processing workstation then save. You'll want to schedule the commit for after you expect the import process to complete.

For example, if your import is scheduled for 7am each weekday, you could schedule the commit for 8am each weekday.

![](_page_12_Picture_9.jpeg)