OnBase Guide – Scheduled DIP/DRIP

Goal: To create schedule DIP/DRIP processes.

Complexity Level: Departmental Administrative Users

8/15/2023

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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 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.
- 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.
- You must know how to create/configure a DIP (Document Import Processor), DRIP (Directory Import Processor) or COLD import.

    o Configure the DIP or DRIP process in Configuration.
    o 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 UIS_DM_Support@cu.edu for assistance.

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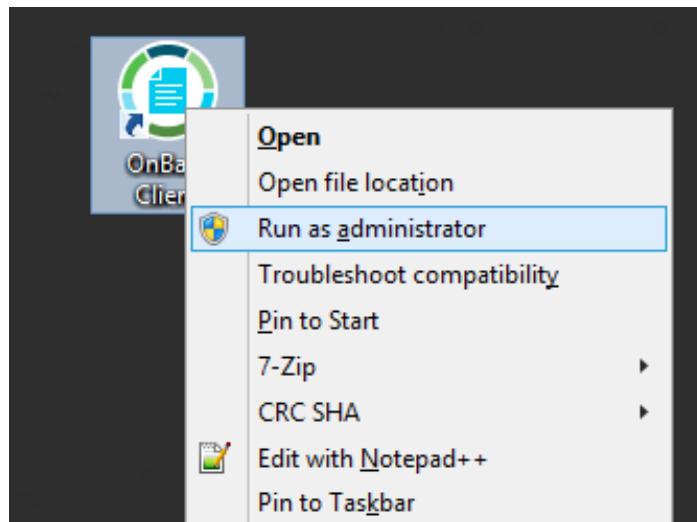
Refer to the Client guides for installation instructions.

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.
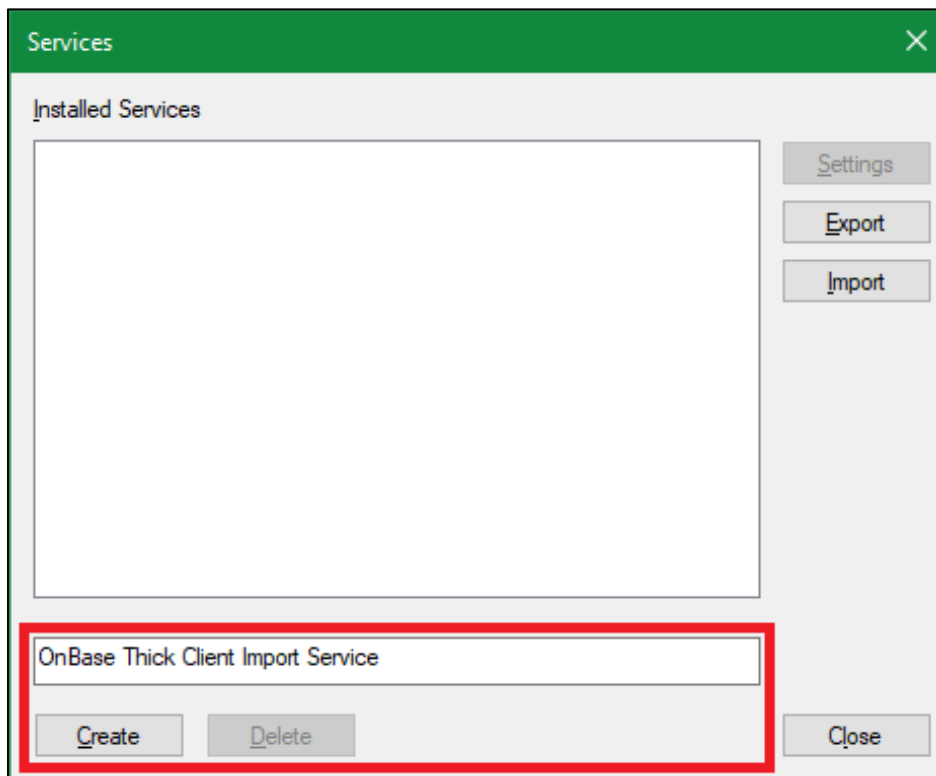
Set Up OnBase Service

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**.

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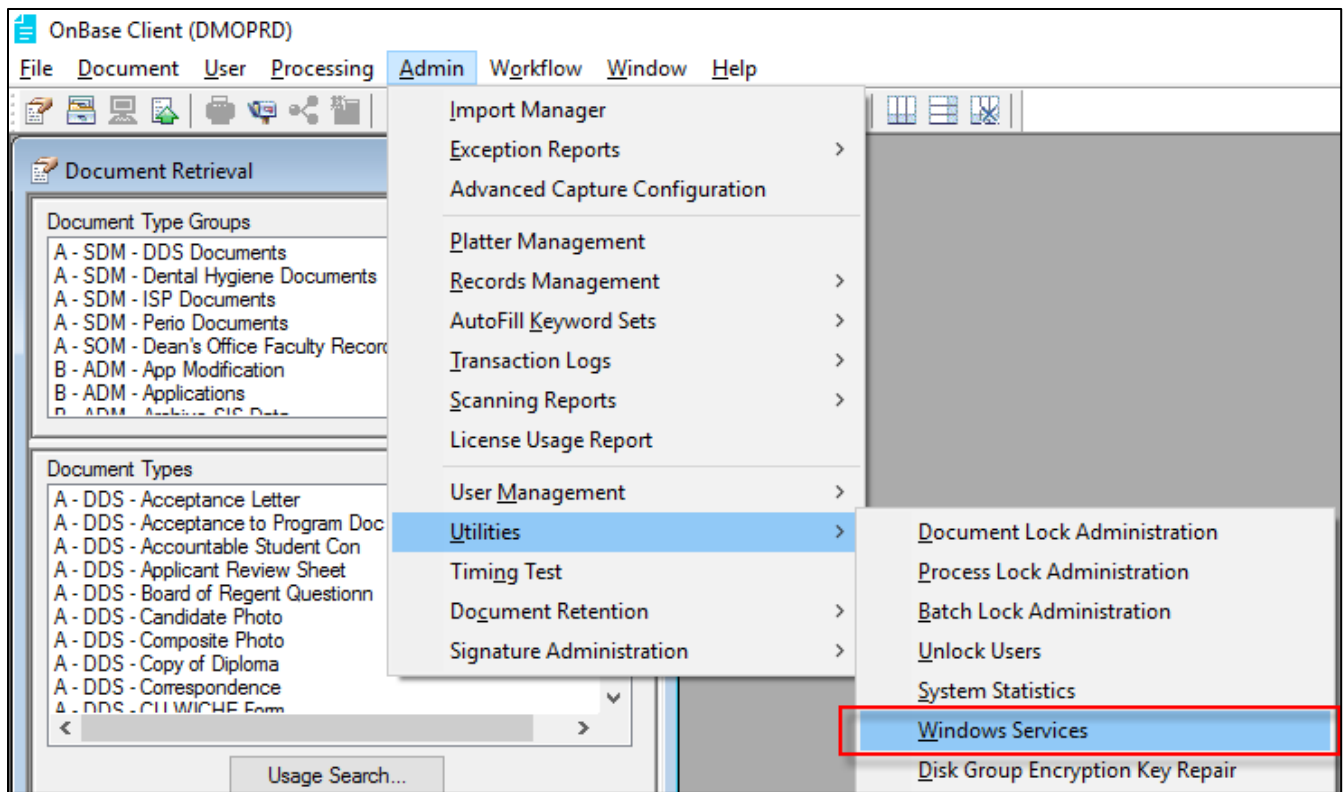
Type the name of your new service, and click the **Create** button.

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

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- 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:

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Service Configuration ✕

Service Settings | Service Logon Settings | Service Dependencies

Service Name

OnBase Thick Client Import Service

Service Description

Scheduled Import

Executable Path

C:\Program Files (x86)\Hyland\OnBase Client\obclnt32.exe   Browse...
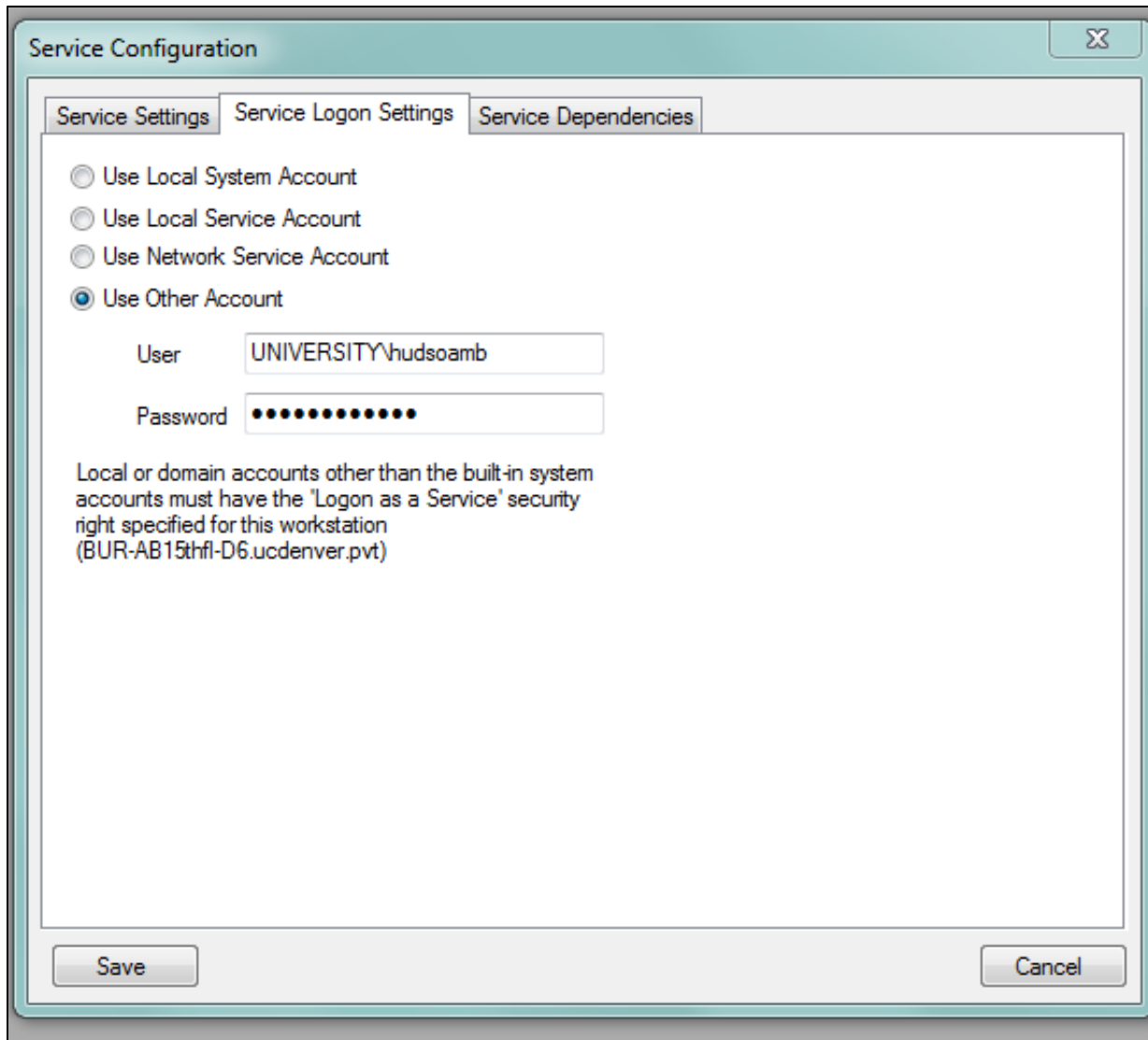
Start Type

Automatic ⌄

User Name   Password

S_B-ADM-DIP   ••••••••••

                                   ☐ Encrypt Password

Additional Arguments

-ODBC="DMOTST" -SCHED

Save   Cancel

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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.


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**.
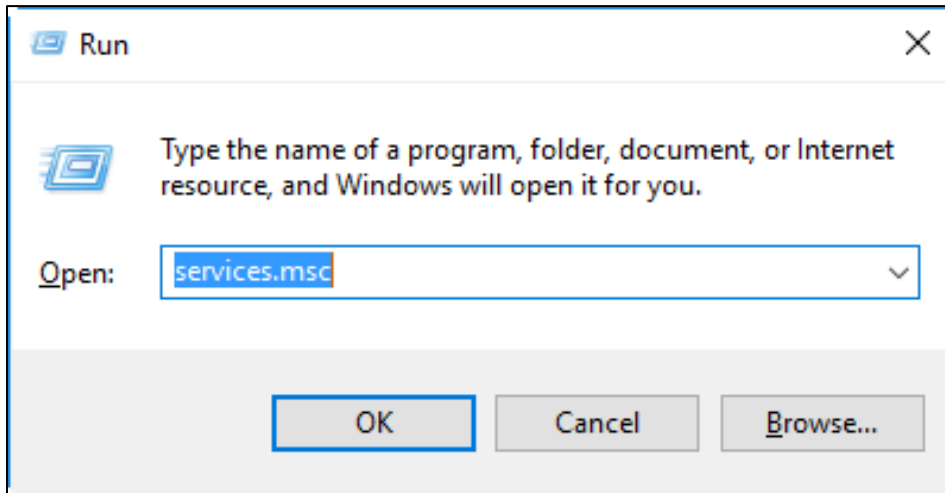
Scroll through the list and find the service with the same name as the OnBase service you just set up. Click it, and click **Start** in "Start the Service."
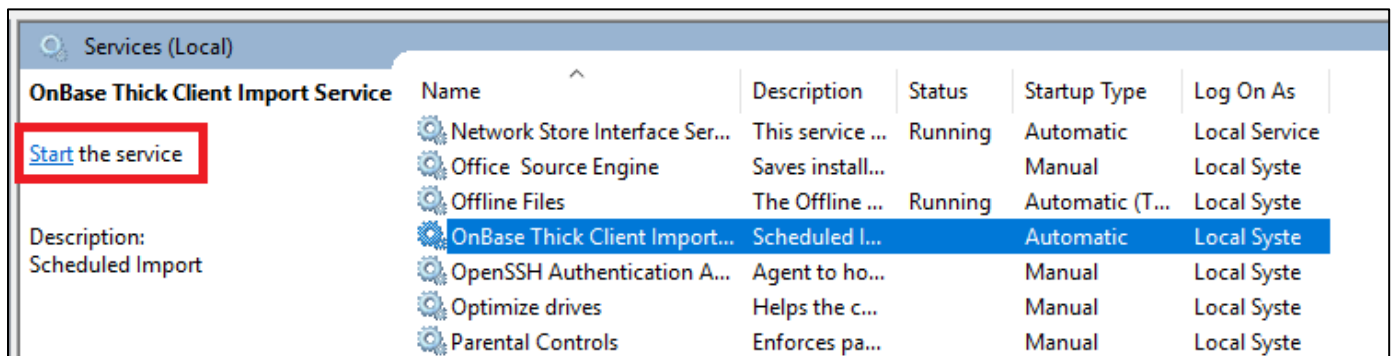
Right click the service name and choose **Properties**. Go to the **Recovery** tab and choose "Restart the Service" for **First failure** and **Second failure**. Set the **Reset fail count after** option to 1 day.

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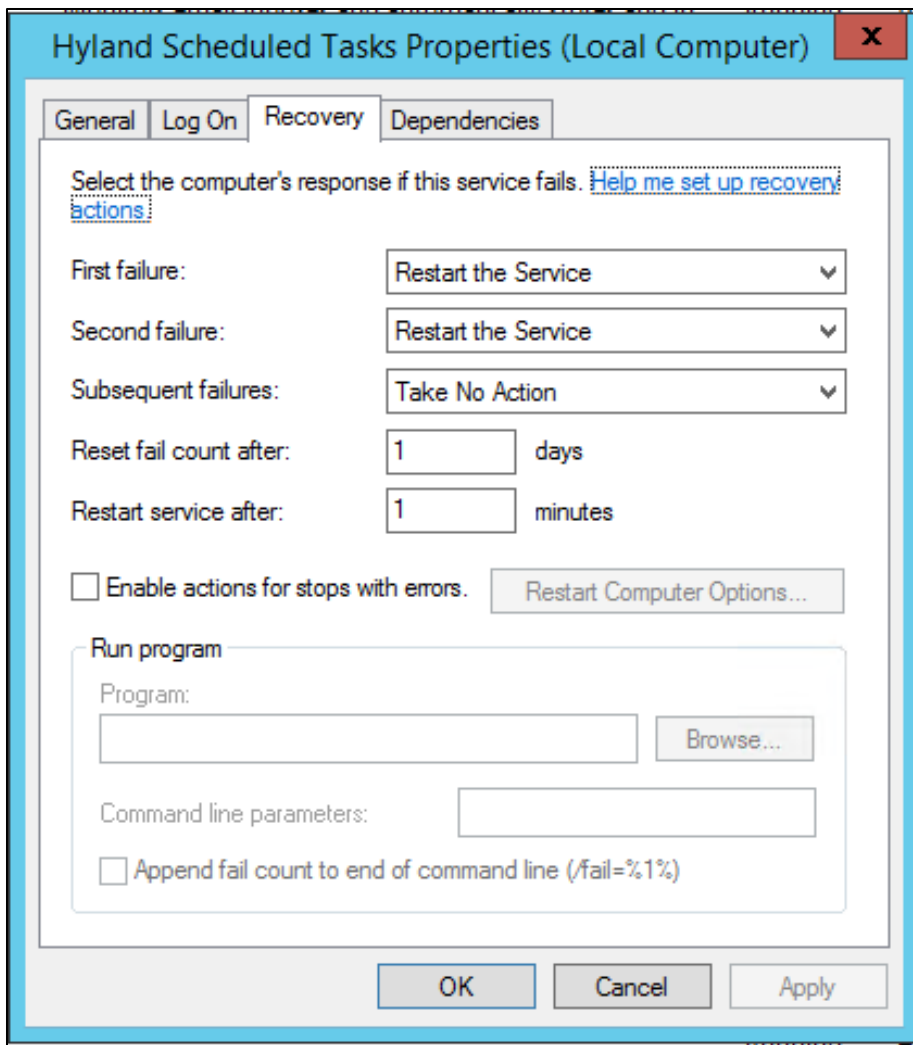
You may close the services window.

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.

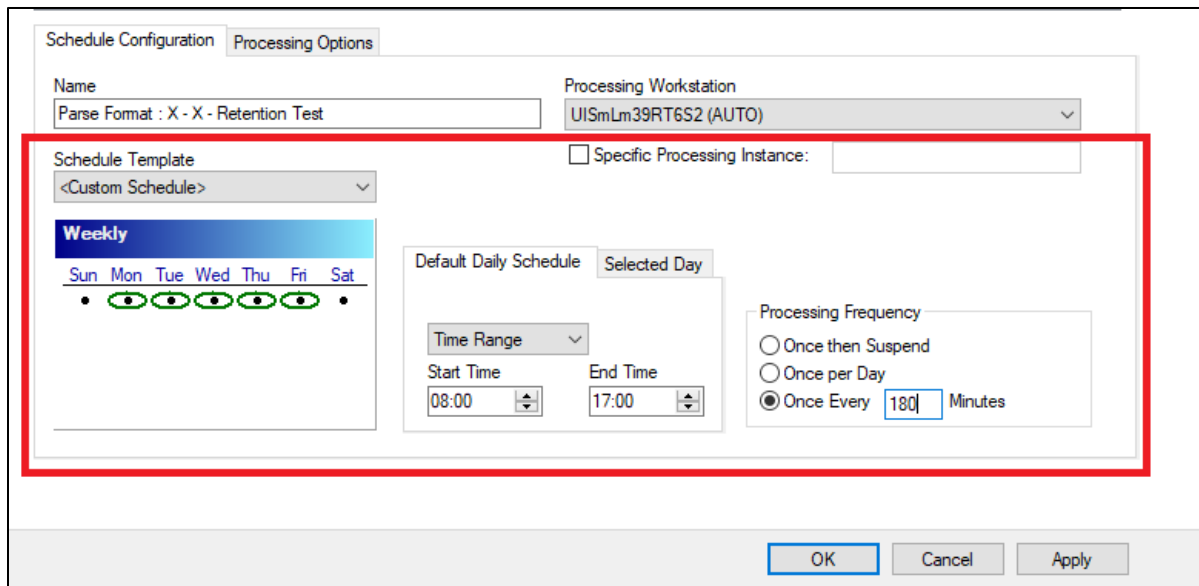## Set up Schedule for DIP/DRIP Service

In the Thick client, choose the **Processing** menu option, then either **DIP** or **Directory Import Processor** (DRIP).
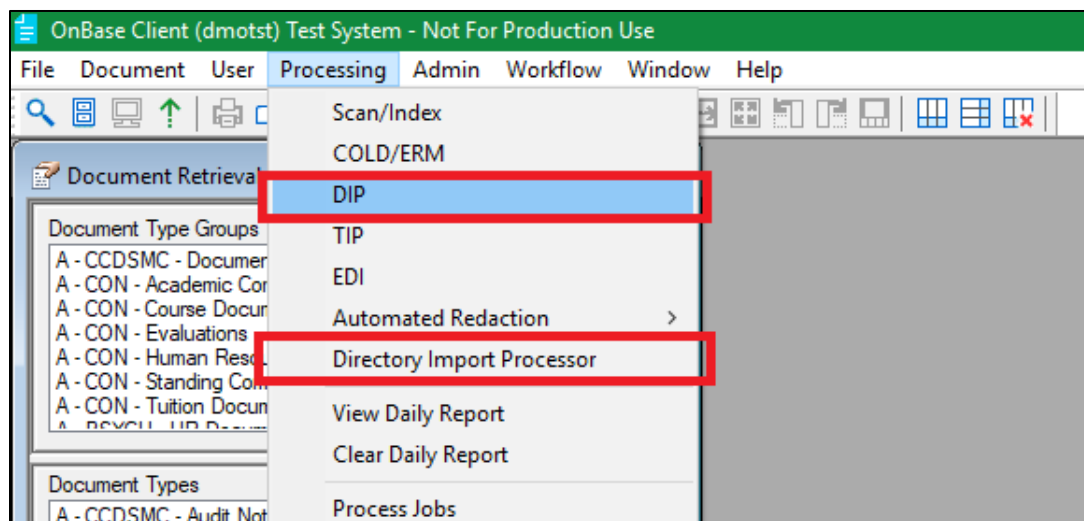
Right-click the desired import process in the list, and select **Schedule Format** from the menu that appears.
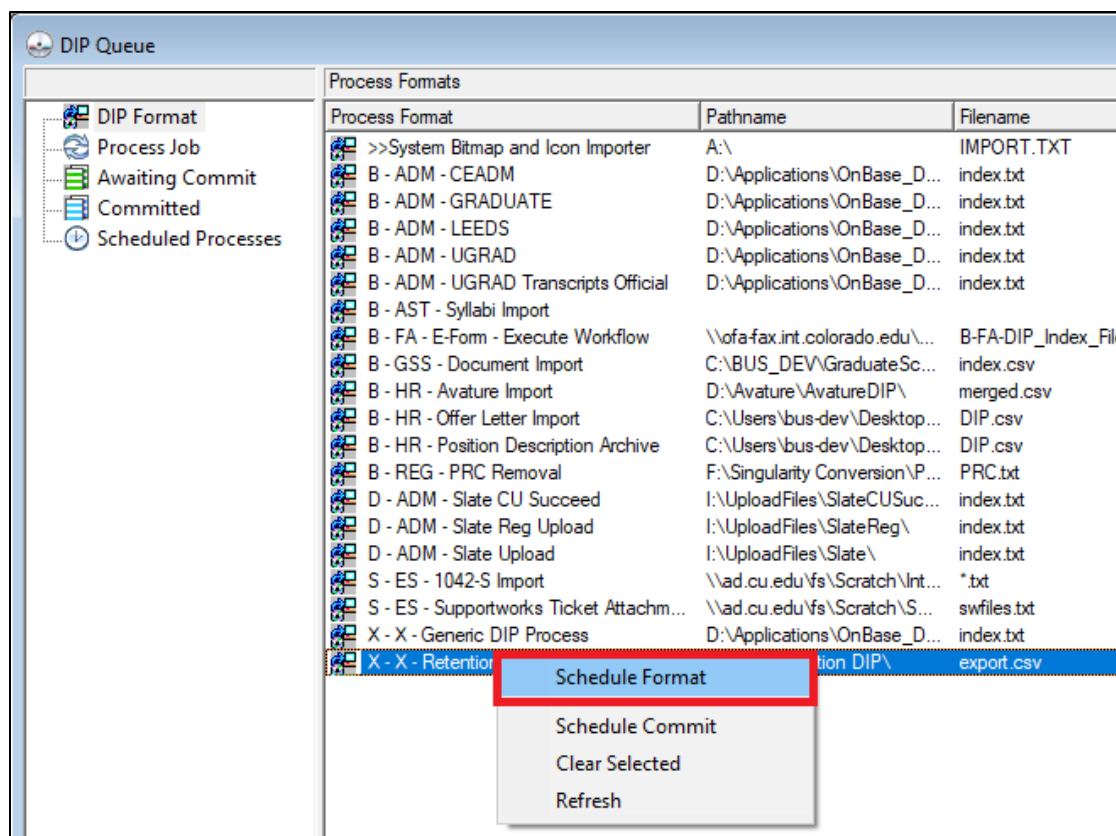
In the **Schedule Configuration** tab, set up your schedule (what days you want to have the process run and how often you want it to run). Do not change the **Name** or field. The **Processing Workstation** should be the name of the machine running the service.

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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.
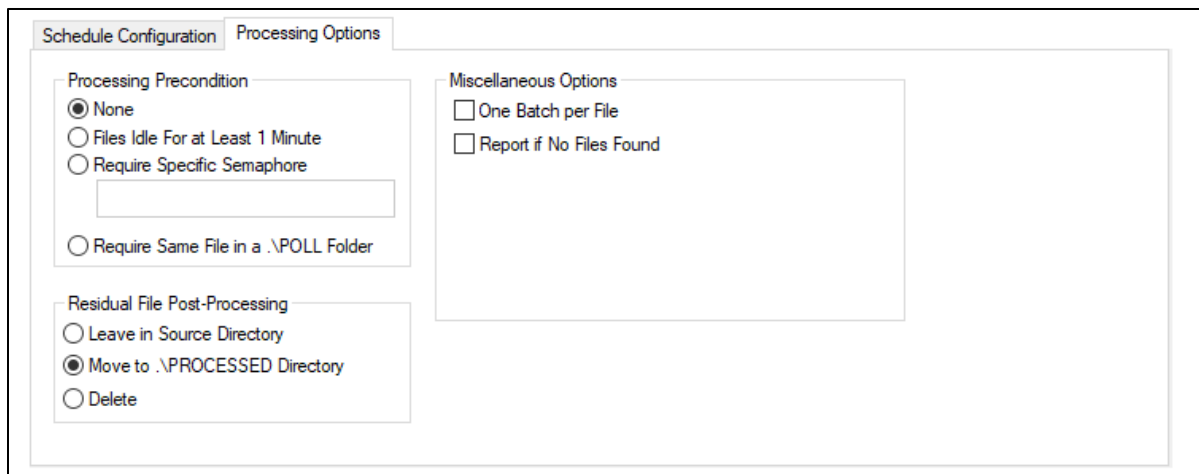

Click **Apply**.

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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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
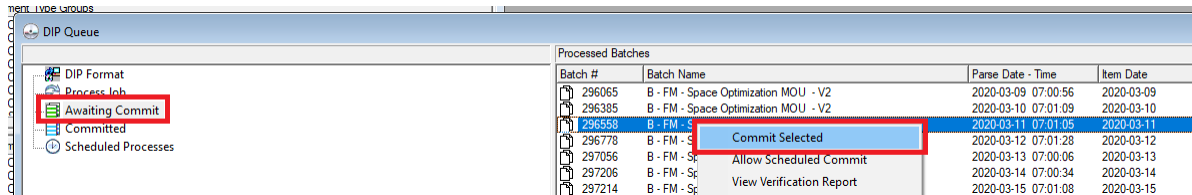
Or it can be scheduled.

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.

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