OnBase Guide – Scheduled DIP/DRIP

Goal: To create schedule DIP/DRIP processes.

Complexity Level: Departmental Administrative Users

4/9/2020
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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](#).
- 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.

Refer to the DIP or DRIP MRGs for additional information if needed. Contact [UIS_DM_Support@cu.edu](mailto:UIS_DM_Support@cu.edu) for assistance.

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Install the OnBase Thick client and Oracle client

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

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**.

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: 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*: [your OnBase user name / Operator ID]
- Password*: [your OnBase password]
- Encrypt Password: [leave unmarked]
- Additional Arguments*: -ODBC=“DMOPRD” –SCHED

*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 – 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 in Additional Arguments.

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 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.
Start the Windows Service & Set Recovery Options

Open the “Run” dialogue by pressing the Windows Key (Esc) + 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 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.

![Schedule Configuration Tab](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 Options Tab](image)

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.
want to select the “Once Every □ Minutes” option on the Schedule Configuration tab.

**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.

**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*

*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.