OnBase®

Foundation EP5

OnBase for Meditech with ODA

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Foundation EP5

Copyright

Document Name .... OnBase for Meditech with ODA

Department/Group .... Documentation

Revision Number .... Foundation EP5

OVERVIEW

INSTALLATION GUIDE

INSTALLATION

STUDIO – CAPTURE PROCESS DESIGNER CONFIGURATION

ADMINISTRATION GUIDE

CONFIGURATION

USER GUIDE

USAGE

Overview

OnBase for Meditech is a suite of OnBase solutions designed to work in conjunction with the Meditech Health Information Management (HIM) solution. OnBase for Meditech is available for the Meditech Magic, Client/Server, and MAT platforms, and for both ODA (Optical Disk Archiving) and non-ODA solutions.

Caution: Not all OnBase for Meditech features and solutions may be available for all platforms/versions of Meditech. Exclusions are noted where possible; for additional information, contact your solution provider.

Like most HIM solutions, Meditech allows a hospital or healthcare provider to eliminate most paper records through the use of its electronic medical record (EMR) technology.

When leveraged with OnBase's archival, retrieval, and workflow capabilities, an OnBase for Meditech solution moves your organization towards a truly paperless health information technology environment. A basic OnBase for Meditech solution allows a hospital or healthcare provider to:

- Retrieve, view, and/or print patient documents stored in OnBase directly from Meditech.
- Provide long-term, online storage for Meditech Archive Reports.
- Retrieve patient information stored in Meditech for use when indexing patient documents that are scanned into OnBase.

All of these features will help your organization to streamline patient care, lower costs, and increase overall patient satisfaction.

In addition to the basic OnBase for Meditech solution, a number of other OnBase for Meditech solutions are available to allow a hospital or healthcare provider to take full advantage of OnBase's state-of-the-art content management technology, including:

- **Front Office Scanning**. A desktop-based scanning and indexing application that allows a hospital to quickly and easily scan a patient's point of care documents and immediately and accurately associate them with the patient's Meditech record during registration.
- **Report Capture for Meditech**. A long-term, online storage solution for Meditech Magic and Meditech 6.0 systems. Report Capture allows a hospital or healthcare organization to store Meditech Medical Record Forms and NPR Reports in OnBase as historical records or to fulfill Release of Information (ROI) requests.
- **Back Office Scanning**. A production-level, batch scanning application used to scan and index large batches of both clinical and non-clinical patient documents.

  Back Office Scanning allows a user to scan a batch of similar or mismatched documents and index each document using patient information stored in Meditech.

- **Pharmacy Express Scanning**. An easy-to-use, low footprint scanning application that dramatically cuts down on the administration and time needed for a hospital pharmacy to fill and deliver a patient's prescription.

  Pharmacy Express Scanning allows a provider to scan a prescription order and immediately route it to the hospital pharmacy via OnBase Workflow. A pharmacist can then check the patient's records in Meditech for any potential drug interactions before filling the prescription and delivering it to the patient.

Tip: For more information on these advanced OnBase for Meditech solutions, contact your solution provider.

OnBase for Meditech Solution Architecture

The basic architecture of your OnBase for Meditech solution depends on if you are using an ODA or non-ODA Meditech solution, as well your Meditech platform (i.e., Magic, Client/Server, or MAT).

Note: Adding other OnBase for Meditech solutions (e.g., Pharmacy Express Scanning, etc.) to your environment will change your OnBase for Meditech solution's architecture.

OnBase for Meditech Active Integrations

The OnBase for Meditech active integrations are those in which OnBase can directly exchange data with Meditech.

These integrations are available for Meditech Magic with ODA and Meditech Client/Server with ODA solutions.

Note: For information on OnBase for Meditech passive integrations (i.e., OnBase for Meditech Magic without ODA, OnBase for Meditech Client/Server without ODA, or OnBase for Meditech Advanced Technology (MAT)), see your solution provider.

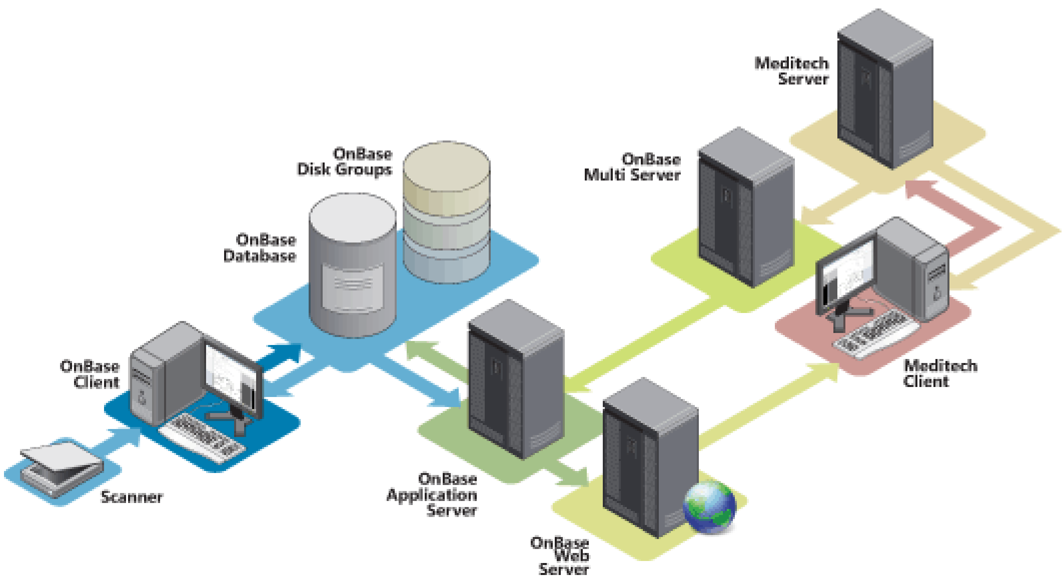
OnBase for Meditech Magic with ODA

There are four main components required for an OnBase for Meditech Magic with ODA solution:

1. **The Hyland Meditech Listener**. The Hyland Meditech Listener is an application installed in your Meditech environment that passes patient data between OnBase and Meditech.
2. **The Hyland Meditech Release Service (HMRS)**. The Hyland Meditech Release Service directs document traffic sent from OnBase to Meditech. It specifies which OnBase Document Types are available to be released to Meditech, and it prepares documents related to the patient record that is currently being viewed in Meditech for retrieval from OnBase by storing links to the related documents within Meditech. It identifies related documents in OnBase by using the patient record's **Medical Record Number**, **Account Number**, **Document Date**, and **Meditech Retrieval ID** values.

3. **The Hyland Multiserver**. The Hyland Multiserver makes it possible for your OnBase Application Server to exchange documents with Meditech. This allows you to:
   - Retrieve documents stored in OnBase from Meditech
   - Store Meditech Archive Reports in OnBase

   The Multiserver can be used in conjunction with another application, the Hyland Printserver, to allow users to print documents stored in OnBase from within Meditech.
4. **The OnBase for Meditech Viewer**. The OnBase for Meditech Viewer is a small-footprint document viewer that allows you to view documents stored in OnBase from your Meditech workstation outside of an OnBase client application.



Note: Depending on your solution’s configuration, the Meditech Client workstation may be the same physical machine as the OnBase Client workstation.

When a user attempts to view a patient document stored in OnBase from Meditech, the document is sent via the OnBase Application Server to the Meditech client workstation and displayed in the OnBase for Meditech Viewer via OnBase DocPop.

Meditech Archive Reports, originally stored in Meditech, can also be sent from Meditech to OnBase for long-term, online storage. When needed, these reports can be retrieved and displayed within Meditech.

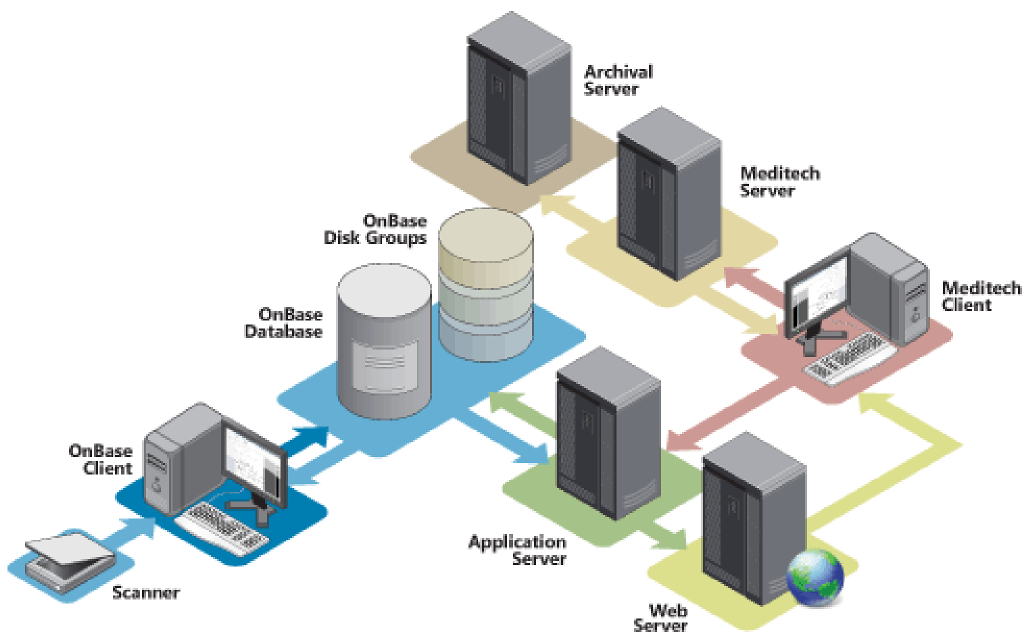
Patient verification allows you to enter a patient’s Account Number or Medical Record Number while indexing a document being stored in OnBase and then query Meditech for additional information about the patient (e.g., patient name, medical record number, document date). This additional information is automatically applied to the document being indexed.

Note: It is considered a best practice to enter a patient’s Account Number for patient verification instead of the Medical Record Number. When using the patient’s Medical Record Number, the patient’s account number is not applied to the document.

OnBase for Meditech Client/Server with ODA

There are three main components required for an OnBase for Meditech Client/Server with ODA solution:

1. **The Hyland Meditech Listener**. The Hyland Meditech Listener is an application installed in your Meditech environment that passes patient data between OnBase and Meditech.
2. **The Hyland Meditech Release Service (HMRS)**. The Hyland Meditech Release Service directs document traffic sent from OnBase to Meditech. It specifies which OnBase Document Types are available to be released to Meditech, and it prepares documents related to the patient record that is currently being viewed in Meditech for retrieval from OnBase by storing links to the related documents within Meditech. It identifies related documents in OnBase by using the patient record's **Medical Record Number**, **Account Number**, **Document Date**, and **Meditech Retrieval ID** values.
3. **The OnBase for Meditech Viewer**. The OnBase for Meditech Viewer is a small-footprint document viewer that allows you to view documents stored in OnBase from your Meditech workstation outside of an OnBase client application.



In an OnBase for Meditech Client/Server with ODA solution, the Hyland Multiserver is not required. The Hyland Meditech Release Service (HMRS) notifies Meditech that there are documents stored in OnBase related to the patient record that is currently being viewed in Meditech and the OnBase Application Server is able to exchange data directly with the Meditech client workstation, allowing OnBase to automatically:

- Notify your Meditech solution that there are documents stored in OnBase related to the patient record that is currently being viewed in Meditech.
- Display documents stored in OnBase on a Meditech client workstation via OnBase DocPop and the OnBase for Meditech Viewer.
- Perform patient verification during indexing. Patient verification allows you to enter a patient's Account Number or Medical Record Number while indexing a document being stored in OnBase and then query Meditech for additional information about the patient (e.g., patient name, gender, date of birth). This additional information is automatically applied to the document being indexed.

Note: It is considered a best practice to enter a patient's Account Number for patient verification instead of the Medical Record Number. When using the patient's Medical Record Number, the patient's account number is not applied to the document.

Applications

One of the biggest benefits of an OnBase for Meditech solution is the ability to view and manage patient data stored outside of Meditech from directly within your Meditech HIM application.

By allowing your providers to have access to all of a patient's information in one familiar interface, you give them the tools they need to provide their patients with the best possible care.

For example:

- When registering a patient in the emergency room, a hospital worker can quickly scan and archive the patient's insurance card and driver's license so they are associated with the patient's Meditech record.

  Any other hospital worker with the appropriate Meditech rights will be able to view these documents from a Meditech client workstation.
- Clinical documents (e.g., EKGs, X-Rays, MRIs, fetal monitor strips, etc.) containing data that is not stored in Meditech can be retrieved and viewed from the patient's Meditech record.

  For example, when conferring with a patient, an orthopedist can retrieve and view DICOM images, such as X-Rays and MRIs, stored in OnBase from a patient's Meditech record.

- Providers can use DeficiencyPop to launch OnBase Medical Records Management directly from Meditech to quickly and efficiently complete their chart deficiencies.

Note: This requires your organization to use the OnBase Medical Records Management solution. Additional licensing and configuration is required.

- OnBase for Meditech supports several integrated authentication methods that allow users to seamlessly access documents stored in OnBase from Meditech. Users are not required to launch or log on to OnBase; in most cases, users will not even be aware that they are not operating within the Meditech application.

Note: Not all integrated authentication methods supported for OnBase are available from all Meditech modules or screens. Careful consideration should be given before selecting an authentication method for your organization. An in-depth discussion of authentication options is provided later in this documentation.

- When scanning non-clinical patient documents (e.g., billing statements and patient correspondence) in OnBase, these documents can be automatically indexed using patient data stored in Meditech.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access OnBase for Meditech functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 6.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 6.

Simplified Licensing

In addition to an enterprise base package license for standard OnBase functionality, the OnBase Integration for Meditech add-on license is required to access standard OnBase for Meditech functionality.

Legacy Licensing

Your OnBase for Meditech with ODA solution requires the following licenses:

- Web Server
- Meditech Data Driver
- Event Relay Server

And one of the following licenses:

- Server for Meditech Magic with ODA (OnBase for Meditech with ODA solutions only)
- Server for Meditech Client Server with ODA (OnBase for Meditech with ODA solutions only)
- Server for Meditech Magic w/o ODA (OnBase for Meditech without ODA solutions only)
- Server for Meditech Client Server w/o ODA (OnBase for Meditech without ODA solutions only)

One or more Client licenses is required to view documents stored in OnBase from within the OnBase Client. Client licenses are not required to view documents from within Meditech via OnBase Pop integrations and/or the OnBase for Meditech Viewer.

Additional licensing is required for additional OnBase for Meditech solutions, such as Report Capture, and Front Office Scanning. For more information, contact your solution provider.

Check your current licensing status by selecting **Utils** | **Product Licenses** from the Configuration module.

OnBase for Meditech with ODA

Installation Guide

Foundation EP5

Requirements

The following sections outline requirement information specific to OnBase for Meditech in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to OnBase for Meditech and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Supported Desktop Operating Systems, see the **Web/Application Server** table column
- Server Browser Requirements
- Databases Supported

Note: The Hyland Multiserver does not support 64-bit Oracle databases.

- Database/File Servers
- Database Client / Server Version Compatibility
- Server C++ Requirements
- Microsoft .NET Framework Requirements

Note: The .NET Framework requirement applies to the OnBase Application Server, the Processing Server (the server hosting the Hyland Meditech Release Service and, if needed, the Hyland Multiserver and the Hyland Printserver), the server hosting the Hyland Meditech Listener, and the client-side workstations where the OnBase for Meditech Viewer is installed.

Meditech Requirements

Your Meditech solution must be licensed and registered for Optical Disk Archiving (ODA) in order for your OnBase for Meditech ODA solution to function.

Note: If your Meditech solution is not, or cannot be, ODA-enabled, contact your solution provider or see the OnBase for Meditech without ODA documentation for more information on building an OnBase for Meditech solution.

For information on the hardware and software requirements for your Meditech Magic or Client/Server with ODA solution, contact your Meditech solution provider.

Hyland Multiserver Microsoft Visual C++ Requirements

One or more versions of the Microsoft Visual C++ Redistributable Package are required. If not already present on your system, the required packages are installed when the **setup.exe** installer is used to install this module.

Workstations running the Hyland Multiserver require the following:

- Microsoft Visual C++ 2005 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)

Installing ActiveX Controls

When ActiveX controls are deployed through the Web browser on a system with UAC enabled, the user is prompted to install each control asking **Do you want to allow the following program to make changes to this computer?**

The prompt is displayed the first time each ActiveX control is needed. Users who are logged on as administrators can click **Yes** to install the specified ActiveX control. Once the control is installed, the user is not prompted again for that control.

If the user is logged on as a standard user rather than an administrator, then an administrator must provide his or her credentials before the control can be installed. To avoid this scenario, deploy the Web ActiveX controls using the Hyland Web ActiveX Controls installer.

For information about using this installer, see Hyland ActiveX Controls Installers on page 55.

Licensing

See Licensing on page 6 for licensing requirements.

Installation

The Hyland Meditech Listener

The Hyland Meditech Listener is an application that runs within the Meditech environment that passes requests for user and patient information from OnBase to Meditech. It must be installed by the Hyland Software OnBase for Meditech team.

Note: The Hyland Meditech Listener is not the same thing as the OnBase HL7 Listener. For more information on the OnBase HL7 Listener, see the HL7 documentation.

The Hyland Meditech Listener receives requests for user authentication and patient verification from the OnBase Application Server and passes them to Meditech. Once the requests are fulfilled by Meditech, the Listener passes the requested information back to the Application Server.

In order to configure your OnBase for Meditech solution, you must know the server name or IP address where the Listener was installed and the port used by the Listener.

Note: Some advanced OnBase for Meditech solutions, such as Report Capture for Meditech, require additional configuration for the Listener. For more information, see the documentation specific to those solutions.

For more information on the Hyland Meditech Listener, contact your solution provider.

The Hyland Meditech Release Service

The Hyland Meditech Release Service is typically installed on your OnBase processing server. Typically, this is a different server than the physical server that hosts your OnBase Application Server. If your solution includes multiple Meditech facilities, you must install a new instance of the Hyland Meditech Release Service for each facility.

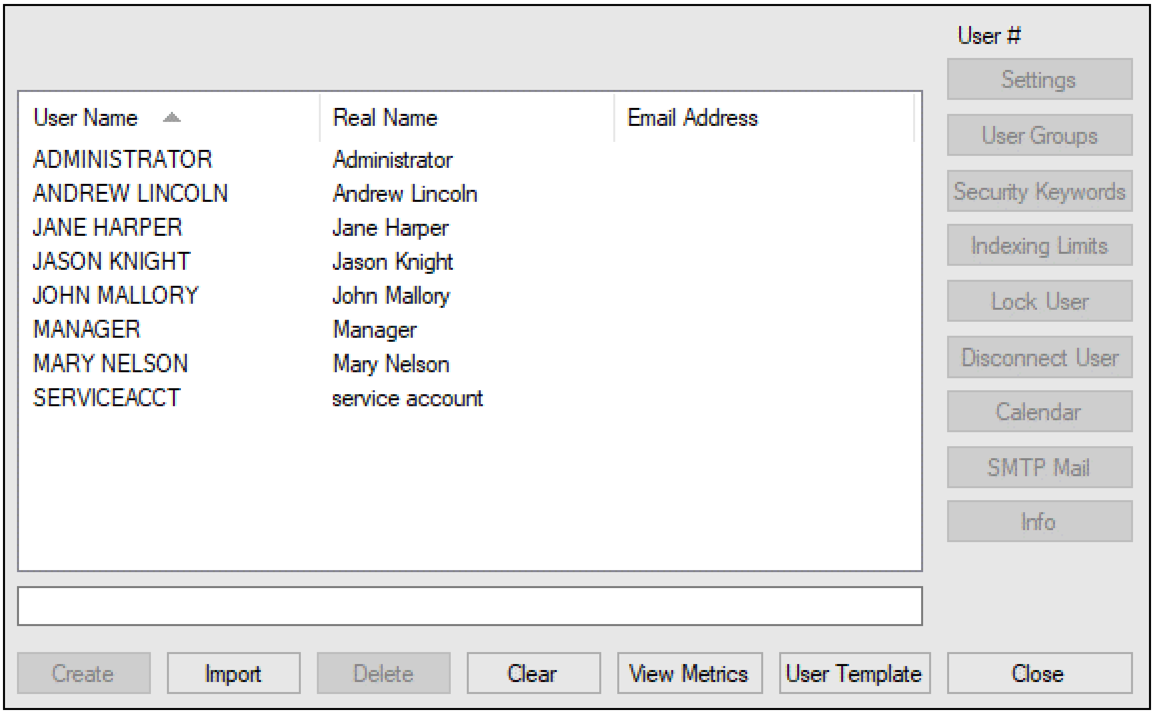
Prior to installing the Hyland Meditech Release Service, you MUST have a functional OnBase Application Server installed on your network that is accessible to the processing server. For more information on installing the OnBase Application Server, see the Application Server module reference guide.

Creating a Service Account for the HMRS

The Hyland Meditech Release Service requires a dedicated OnBase service account. The user name for this account should indicate that it is used solely by the HMRS (e.g., **OB_HMRS**).

To configure a Service Account:

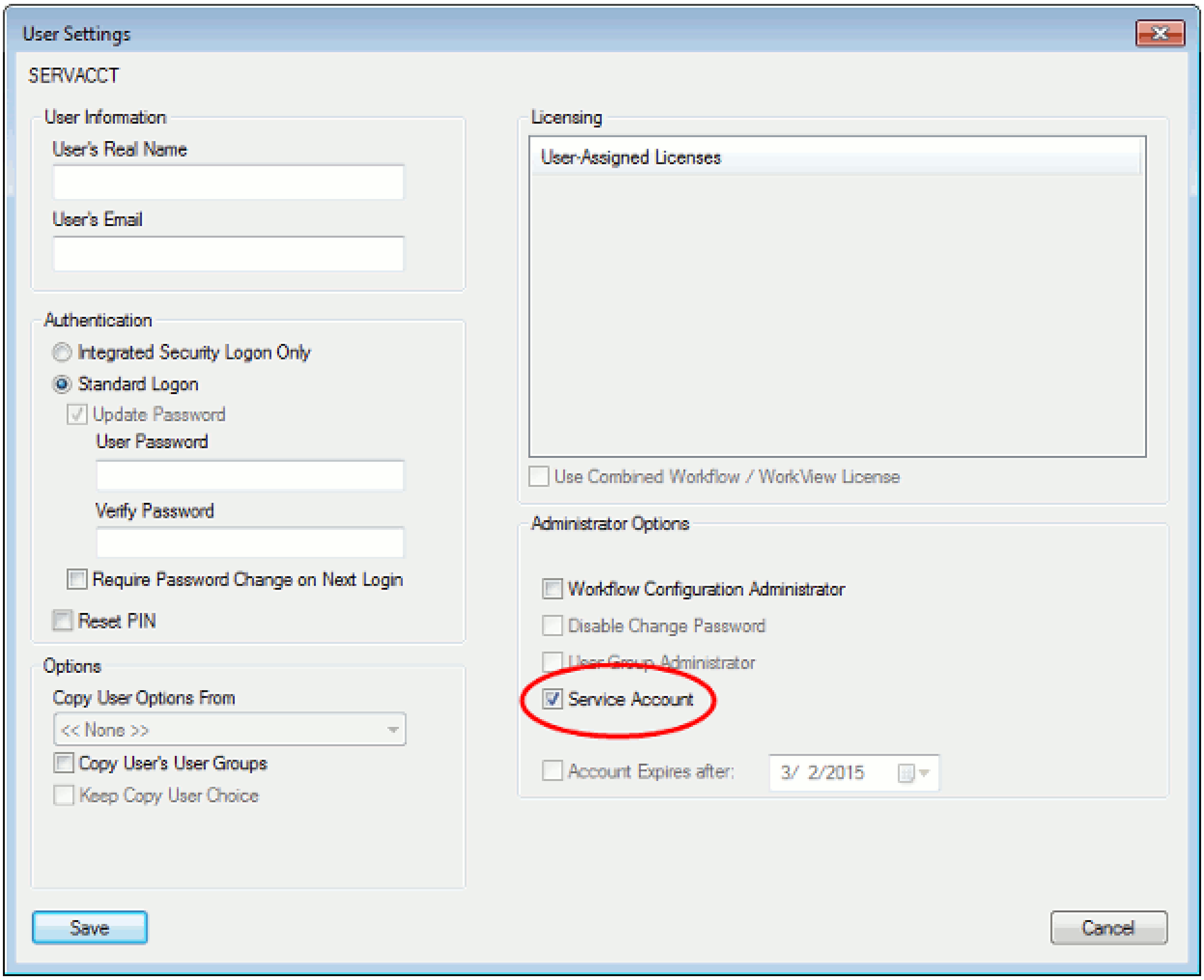
1. From the Configuration module, select **Users | User Names / Passwords**.
   The **User Names & Passwords** dialog box is displayed.



2. Enter a new user name in the field beneath the **User Name** list and click **Create**. The **User Settings** dialog box is displayed.
   You can also select an existing user account to designate as a service account, then click **Settings**. The **User Settings** dialog box is displayed.

3. Select the **Service Account** check box under **Administrator Options**.

   All options not applicable to a Service Account are disabled. Deselecting the **Service Account** check box for the existing user allows them to retain all rights and privileges that were previously assigned to them. Options in the **User Settings** dialog box are cleared when the **Service Account** check box is selected and must be reapplied when the check box is deselected.



Caution: The **Service Account** check box should never be selected with an account that is being used to run the OnBase Client (obclnt32.exe) as a Windows service.

Caution: Designating an existing user account as a **Service Account** removes the existing user from all User Groups and prevents the user from being added into a User Group. Users that are configured as service accounts will not be able to log into OnBase through standard interfaces. A Service Account also grants the user name full rights and privileges in OnBase.

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4. Enter a **User Password** and repeat this password in the **Verify Password** field. If this is an existing user account and you need to change its password, select **Update Password** to enable these fields.

Note: The **Require Password Change on Next Login** setting cannot be selected for Service Accounts.

5. Click **Save**.

Installing the Hyland Meditech Release Service

The following steps are required for installing the Hyland Meditech Release Service using the Hyland Meditech Release Service Setup Wizard.

1. **Create a Service Account For the HMRS**. See Creating a Service Account for the HMRS on page 11.
2. **Install the HMRS on the Processing Server**. See Installing the HMRS on the Processing Server via the Setup Wizard on page 14, or Installing the HMRS on the Processing Server From the Command Line on page 19.

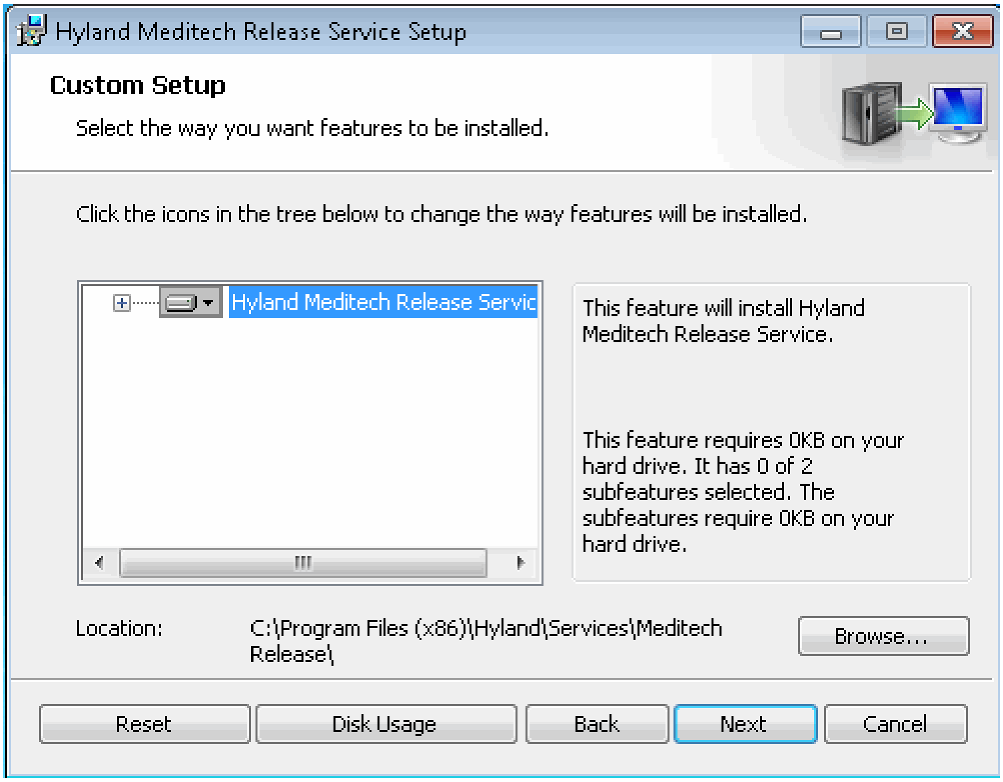
Note: In environments with multiple medical facilities, a separate instance of the Hyland Meditech Release Service must be installed on a different processing server for each medical facility.

3. **Edit the OnBasetoODA.INI File**. See Editing the OnBaseToODA.INI File on page 23.
4. **Edit the Hyland.Integrations.Meditech.Release.Service.exe.config File**. See Editing the Hyland.Integrations.Meditech.Release.Service.exe.config File on page 25.

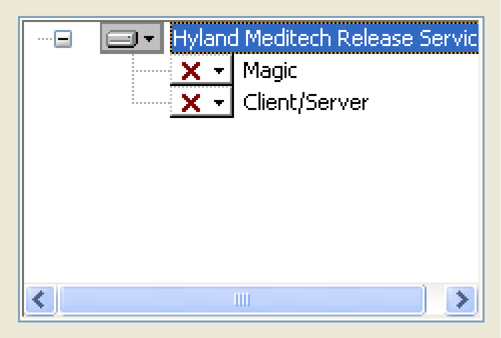
Installing the HMRS on the Processing Server via the Setup Wizard

1. Obtain the Hyland Meditech Release Service Setup Wizard's executable (i.e., **Hyland Meditech Release Service.msi**) and copy it to your processing server.
2. Double-click the setup wizard's executable to launch it. The setup wizard's **Welcome** screen is displayed.

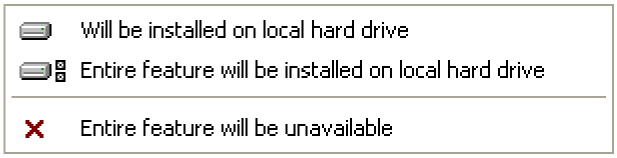
3. Click **Next** to proceed to the **Custom Setup** screen.



4. Expand the Hyland Meditech Release Service component. Two additional options (**Magic** and **Client/Server**) are displayed.



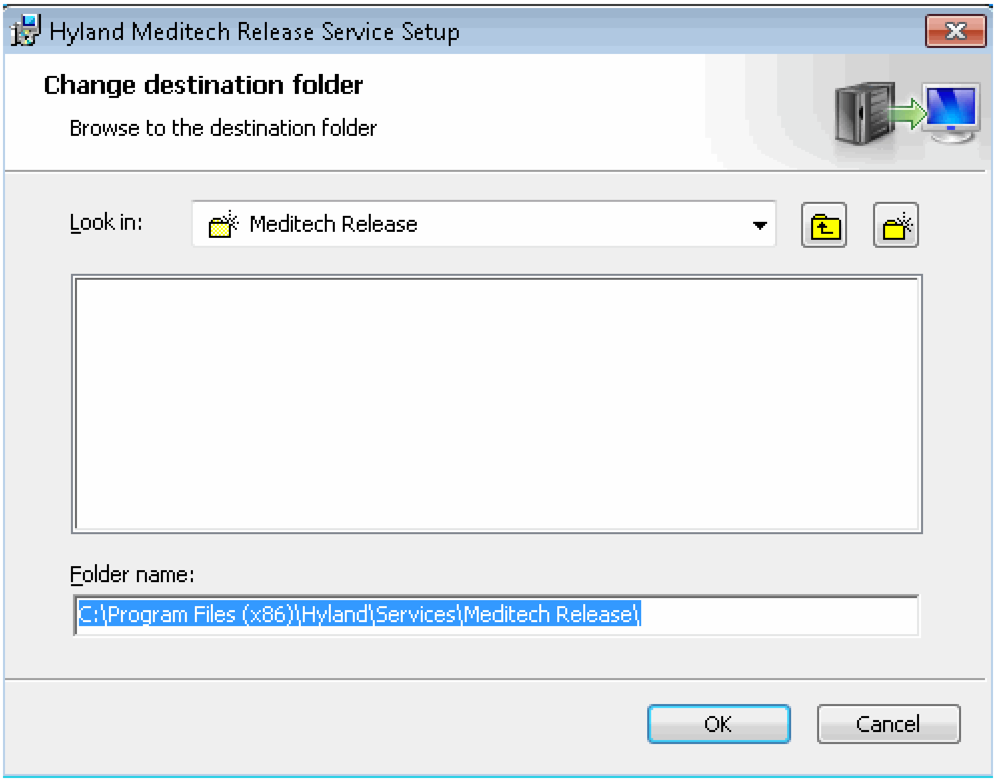
5. Click the drop-down select list next to the **Magic** and **Client/Server** options to display their installation options.



Option	Description
Will be installed on local hard drive	Installs the selected feature and does not install any dependent optional functionality. To view optional functionality, click the **+** icon next to the feature to expand the sub feature list.
Entire feature will be installed on local hard drive	Installs the selected feature and any dependent functionality. To view the dependent functionality, click the **+** icon next to the feature to expand the sub feature list.
Entire feature will be unavailable	Select this option to remove a feature from the list of features to install.

6. Next to the option that corresponds to the Meditech platform you use (i.e., Magic or Client/Server) select **Will be installed on local hard drive**.
7. Next to the option that corresponds to the Meditech platform you do not use (i.e., Magic or Client/Server), select **Entire feature will be unavailable**.
8. To determine the amount of space available for installation of the HMRS, click **Disk Usage**. The **Disk Space Requirements** dialog is displayed, with information on the space required for the selected components and the space available on the drives accessible by the installation machine.

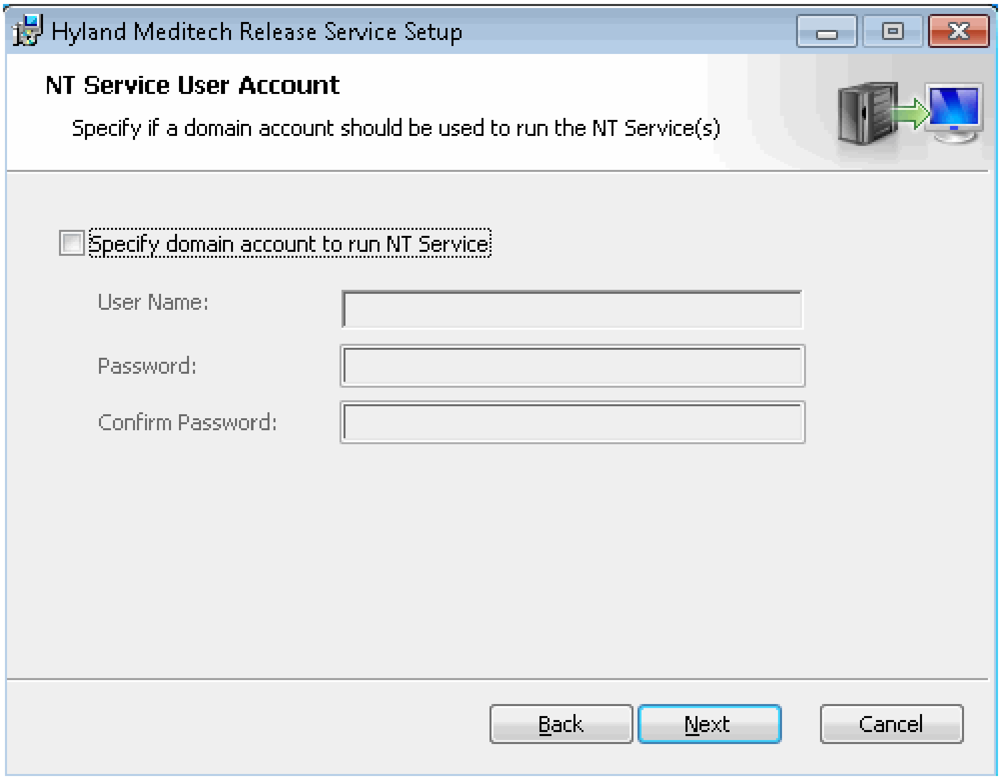
9. To change the installation location of the Hyland Meditech Release Service:
   a. Select the Hyland Meditech Release Service component and click **Browse**. The **Change destination folder** dialog is displayed.



   b. Enter a **Folder name** in the field provided or select it from the **Look in** drop-down select list.

      If the destination folder is not changed, the HMRS is installed in **C:\Program Files\Hyland\Services\Meditech Release** by default.
   c. Click **OK**. You are returned to the **Custom Setup** screen.

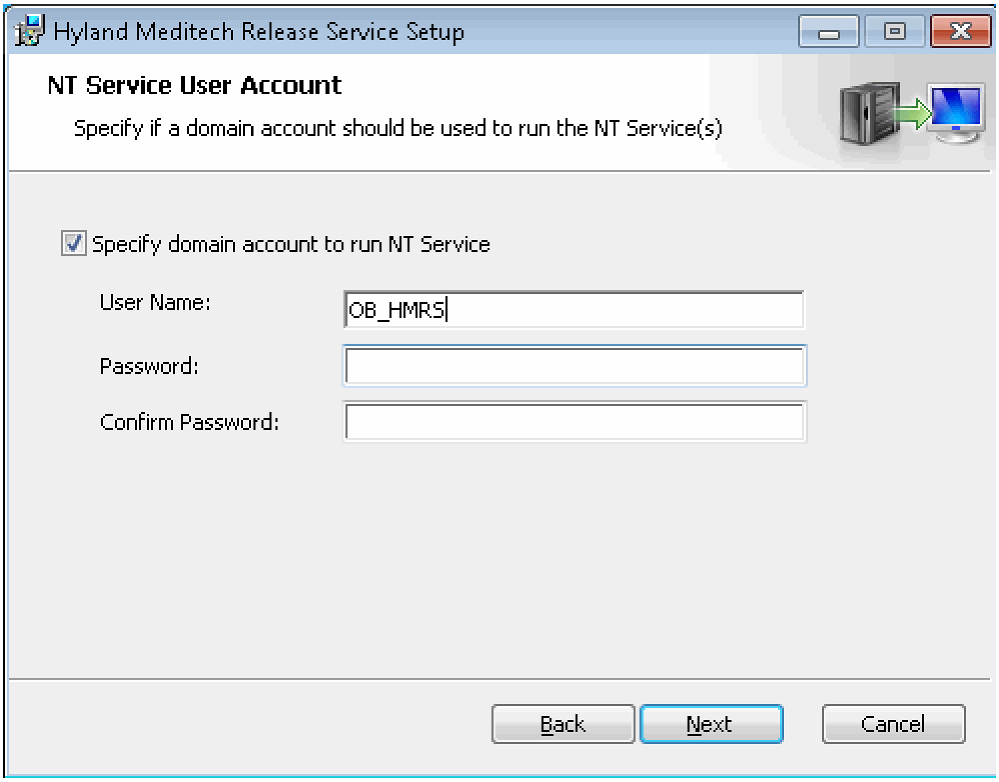
10. Click **Next**. The **NT Service User Account** screen is displayed.



11. If you would like to specify a domain account to run the Hyland Meditech Release Server Windows service, select the **Specify domain account to run NT Service** check box and enter the domain account's authentication credentials in the corresponding fields.

    If you do not want to specify a domain account to run the Hyland Meditech Release Server Windows service, proceed to Step 14.

12. Click **Next**. The **OnBase Service Account** screen is displayed.



13. Enter the authentication credentials for the OnBase service account that you created for the HMRS.
14. Click **Next**. The **Ready to install Hyland Meditech Release Service** screen is displayed.
15. Click **Install** to begin the installation.
16. Once the installation is complete, click **Finish**. If you selected the Launch HMRS Configuration option, the Hyland Meditech Release Service Configuration dialog box is displayed. See for more information.

Installing the HMRS on the Processing Server From the Command Line

The Hyland Meditech Release Service installer can be run from an installation CD or a local drive. If upgrading from a previous installation that used the Hyland Meditech Release Service installer, it is not necessary to uninstall the old components before running the installer.

Feature and Property Names

The following sections describe the feature and property names that can be applied to the command line to install and configure components contained in the OnBase for Meditech Client installer.

Features define the components that are installed. Properties define the configuration settings for the components that are installed.

Feature Names

You can control the installation of components from the command line using the **ADDLOCAL** property. To install a component, pass its feature name to installer using the **ADDLOCAL** property. The table below lists the properties that you can set during installation.

The **ADDLOCAL** property is appended to the end of the install command line, as shown here:

msiexec /i "Hyland Meditech Release Service.msi" ADDLOCAL=MeditechMagic

This example installs the OnBase for Meditech Integration for Meditech Magic.

Note: Feature names are case sensitive and must be added to the command line exactly as they appear in this table. For details on the associated properties, see Property Names on page 20.

Component	Feature Name
Hyland Meditech Release Service	**MeditechERS** **Note:** This feature is always installed when any other feature is installed.
Magic	**MeditechMagic**
Client/Server	**MeditechClntSrvr**

Property Names

When controlling the installation of components from the command line you must also configure the settings for each component you are installing by using the properties listed in the following sections. The table below lists the property names available and the corresponding features that use them.

Property	Description
APPLICATION_SERVER_URL	The URL to the **Service.asmx** page of the Application Server. For example: **APPLICATION_SERVER_URL="http://localhost/AppServer/Service.asmx"**
DATASOURCE	The ODBC connection for your OnBase Data Source. For example: **DATASOURCE="MyDatabase"**

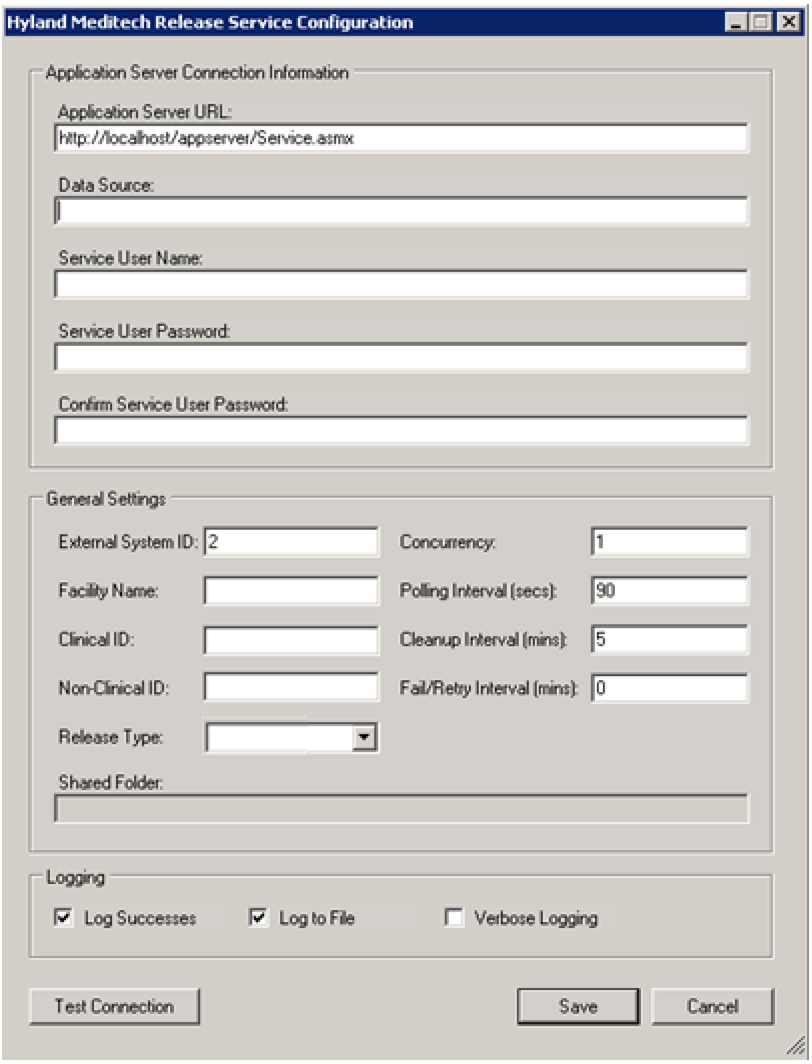
Property	Description
NTSERVICE_USE_DOMAIN_ACCOUNT	Specifies whether a domain account is used to run the Hyland Meditech Release Service. Enter **1** to run the service under a specified domain account. To disable this option, set this property to **0**. By default, this property is set to **0**. For example: **NTSERVICE_USE_DOMAIN_ACCOUNT="1"**
NTSERVICE_USER	The domain user account to use if NTSERVICE_USE_DOMAIN_ACCOUNT is set to **1**. For example: **NTSERVICE_USER="domain\username"**
NTSERVICE_PASS	The password for the NTSERVICE_USER account. For example: **NTSERVICE_PASS="MyPassword"**
DB_SERVICE_USER	The user account used for the **OnBase Service Account**. For example: **DB_SERVICE_USER="HMRSService"**
DB_SERVICE_PASS	The password for the user account used for the **OnBase Service Account**. For example: **DB_SERVICE_PASS="HMRSPassword"**
MRS_START_SERVICE	Specifies whether to start the Hyland Release Meditech Service immediately after installation. To start the Hyland Meditech Release Service, set this property to **1**. To disable this option, set this property to **0**. For example: **MRS_START_SERVICE="1"**

Configuring the HMRS

Upon completion of the installation of the Hyland Meditech Release Service, a check box is displayed on the final installation screen, allowing you to launch the HMRS configuration dialog box. If you select this option, you can configure the HMRS immediately following installation.

To configure the HMRS:

1. If the Launch HMRS Configuration option is selected on the Completed Installation screen during installation of the HMRS, the Hyland Meditech Release Service Configuration dialog box is displayed.



2. The Application Server URL field is automatically populated with the specific URL for your Application Server. Modify the value if needed.
3. Enter the datasource to connect to in the **Datasource** field.
4. Enter the service name in the **Service User Name** field. This service name is the one you created prior to installing the HMRS. See Creating a Service Account for the HMRS on page 11 for more information.
5. Enter the password for the service name in the **Service User Password** field.
6. Re-enter the service name password in the **Confirm Service User Password** field.
7. Click **Test Connection** from the bottom of the dialog box to ensure that the values you entered are correct.

8. Set the following options in the **General Settings** section:
    - **External System ID**. This value identifies the External System that was set up in the OnBase Config tool. See Defining Meditech Configuration Parameters in OnBase on page 115 for more information. The default value is 2.
    - **Facility Name**. This must be set to the name of the facility that this instance of the HMRS serves.
    - **Clinical ID**. This value represents the clinical ID for your configuration. This value is required and must be set to the clinical Event Relay Server ID number.
    - **Non-Clinical ID**. This values represents the non-clinical ID for your configuration. This value is required and must be set to the non-clinical Event Relay Server ID number.
    - **Release Type**. Select a release type from the drop-down list. The value that display are dependent on what was installed during the installation process.
    - **Concurrency**: This value displays the number of concurrent licenses available for the HMRS tool.
    - **Polling Interval (secs)**. This value determines the time between polling sessions. Either accept the default or enter a new value if needed.
    - **Cleanup Interval (mins)**. This value determines the time between performing a system cleanup. Either accept the default or enter a new value if needed.
    - **Fail/Retry Interval (mins)**. This setting controls the rate at which the HMRS will attempt to release documents to Meditech if a connection error caused those documents to fail. This setting is disabled by default.
    - **Shared Folder**. Depending on the value selected from the Release type drop-down list, the shared folder field may be activated. Set this value to a valid UNC path for the shared folder to which OnBase documents will be released according to Meditech R1457 specification.
9. Select from the following options in the **Logging** section:
    - **Log Successes**. Select this check box to log all successful transactions.
    - **Log to File**: Select his check box to log items into a log file.
    - **Verbose Logging**. Select this check box to provide detailed information of a logged event.
10. Click **Save**. The configurations are saved and the dialog box closes.

Editing the OnBaseToODA.INI File

1. Browse to the Hyland Meditech Release Service's installation folder. By default, it is located at **C:\Program Files\Hyland\Services\Meditech Release**.
2. Open the **OnBaseToODA.ini** file in a text editor, such as Notepad.
3. Edit the **OnBaseToODA.ini** file based on the Meditech platform you are using.
    - **For Meditech Magic solutions**. See Integrating OnBase with a Meditech Magic Solution on page 24.
    - **For Meditech Client/Server solutions**. See Integrating OnBase with a Meditech Client/Server Solution on page 24.

Integrating OnBase with a Meditech Magic Solution

1. In the **[General]** section, ensure that the **MeditechType** setting is set to **Magic**.
2. Ensure that the **[Magic]** section is present and that no **[CS]** section is present. The **[Magic]** section should look like this:
```
[Magic]
PCI_IP=
PCI_Port=
PCI_SEGMENT=
PCI_MDIRECTORY=
PCI_MIS=
PCI_APP_DB=

BO_IP=
BO_PORT=
BO_SEGMENT=
BO_MDIRECTORY=
BO_MIS=
BO_APP_DB=
```
3. Set the **PCI_IP** setting to the IP address of the Meditech PCI (clinical) server.
4. Set the **PCI_Port** setting to the port number used by the Meditech PCI (clinical) server.
5. Set the **BO_IP** setting to the IP address of the Meditech Back Office (non-clinical) server.
6. Set the **BO_Port** setting to the port number used by the Meditech Back Office (non-clinical) server.
7. Set the remainder of the settings in the **[Magic]** section to the site's specific Meditech settings.
8. Save and close the **OnBaseToODA.ini** file.

Integrating OnBase with a Meditech Client/Server Solution

1. In the **[General]** section, ensure that the **MeditechType** setting is set to **CS**.
2. Ensure that the **[CS]** section is present and that no **[Magic]** section is present. The **[CS]** section should look like this:
```
[CS]
IP=
Port=
UNIVERSE=
HCIS=
FACILITY=
TIMEOUT=
```
3. Set the **IP** setting to the IP address of the Meditech server.
4. Set the **Port** setting to the port number used by the Meditech server.
5. Set the remainder of the settings in the **[CS]** section to the site's specific Meditech settings.

6. Save and close the **OnBaseToODA.ini** file.

Editing the Hyland.Integrations.Meditech.Release.Service.exe.config File

1. Browse to the Hyland Meditech Release Service's installation folder. By default, it is located at **C:\Program Files\Hyland\Services\Meditech Release**.
2. Open the **Hyland.Integrations.Meditech.Release.Service.exe.config** file in a text editor, such as Notepad.
3. Ensure that the following settings in the **Hyland.Integrations.Meditech.Release.Service.exe.config** file are configured:

Setting	Description
ApplicationServer	This must be set to the URL of your Application Server. This is set during installation.
ServiceClientType	This must be set to the communication method used by your Application Server. This is set during installation.
dataSourceName	This must be set to the name of the data source connection. This is set during installation.
ServiceUserName	This must be set to the service user configured to use the HMRS. The value of the **password** setting must be configured as the password for the specified service user. These values are set during installation.
ClinicalID	This must be set to the clinical Event Relay Server ID number.
NonClinicalID	This must be set to the non-clinical Event Relay Server ID number.
ExternalMeditechSystemTypeID	This must be set to the ID of the external Meditech system as it is configured in OnBase.
FacilityName	This must be set to the name of the facility that this instance of the HMRS serves.
failureRetryInterval	This setting controls the rate at which the HMRS will attempt to release documents to Meditech if a connection error caused those documents to fail. This setting is disabled by default. Optionally, enable this setting by setting the value to the number of minutes the HMRS should wait between attempts to release documents to Meditech. This value must be in minutes. The minimum value is 5 minutes.

4. If you are configuring this instance of the HRMS to release to Meditech SCA, configure the following additional settings:

Setting	Description
releaseType	Set this value to **3** in order to release to Meditech SCA using specification R1457.
sharedFolder	Set this value to a valid UNC path for the shared folder to which OnBase documents will be released according to Meditech R1457 specification. If the value of **releaseType** is **3**, the **sharedFolder** value cannot be empty.

5. Save and close the **Hyland.Integrations.Meditech.Release.Service.exe.config** file.

The Hyland Multiserver and Printserver

The Hyland Multiserver is required for OnBase for Meditech Magic with ODA solutions. It is not required for integrating OnBase with Meditech Client/Server with ODA solutions or any non-ODA Meditech solutions.

The Hyland Multiserver allows documents stored in OnBase to be retrieved and viewed from within Meditech as part of an OnBase for Meditech Magic with ODA solution.

The Hyland Printserver allows documents stored in OnBase for Meditech to be printed.

The Hyland Multiserver and Printserver are typically installed on your OnBase processing server, for example, the same physical server on which the Hyland Meditech Release Service is installed. If your solution includes multiple Meditech systems, separate Multiserver instances must be installed and configured for each Meditech system.

Prior to installing the Hyland Multiserver and Printserver, you must have a functional OnBase Application Server installed on your network that is accessible to the processing server. For more information on installing the OnBase Application Server, see the **Application Server** module reference guide.

Tip: To improve performance, it is recommended to install a separate Application Server for use by the Hyland Multiserver. This extra Application Server should be installed on the same physical server that the Hyland Multiserver will be installed on. It is also recommended to install the extra Application Server onto a virtual machine to improve performance.

The following steps are required for installing the Hyland Multiserver:

1. **Create a Service Account for the Multiserver**. See Creating a Service Account for the Multiserver on page 27.
2. **Install the Hyland Multiserver and/or Printserver on the Processing Server**. See Installing the Multiserver and Printserver on the Processing Server on page 29.
3. **Start the Multiserver/Printserver Services**. See Starting the Multiserver & Printserver Services on page 38.

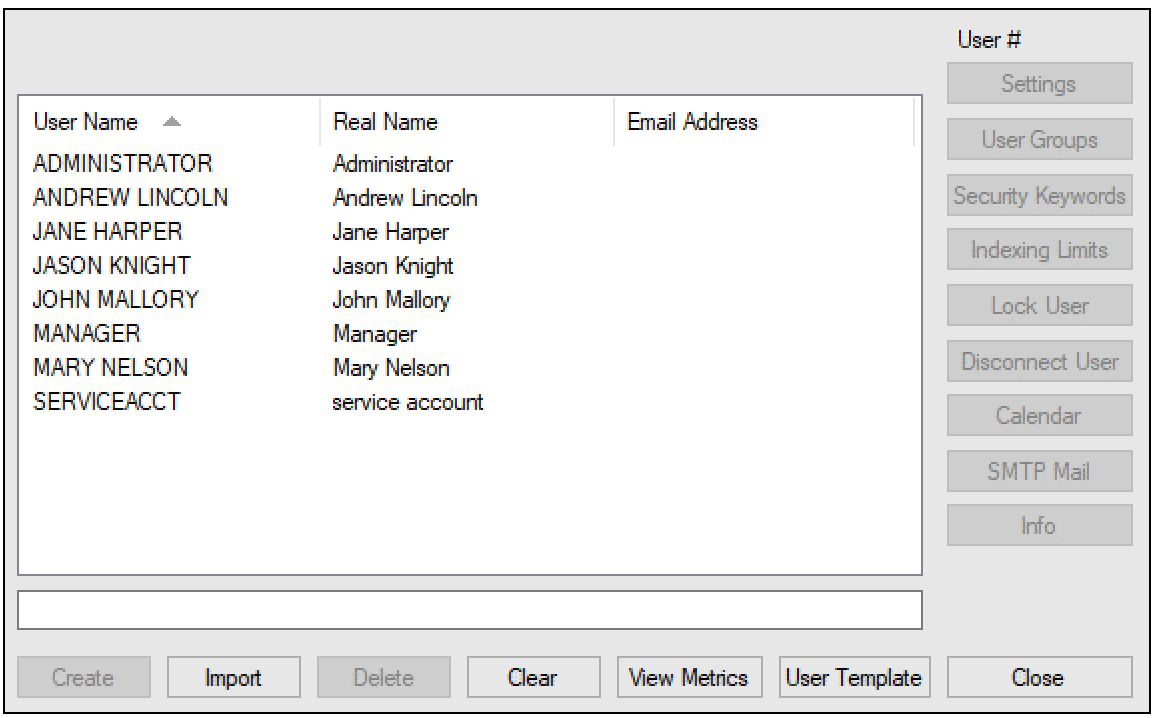
Creating a Service Account for the Multiserver

The Hyland Multiserver requires a dedicated OnBase service account. The user name for this account should indicate that it is used solely by the Multiserver (e.g., **OB_MultiServer**).

To configure a Service Account:

1. From the Configuration module, select **Users | User Names / Passwords**.

   The **User Names & Passwords** dialog box is displayed.

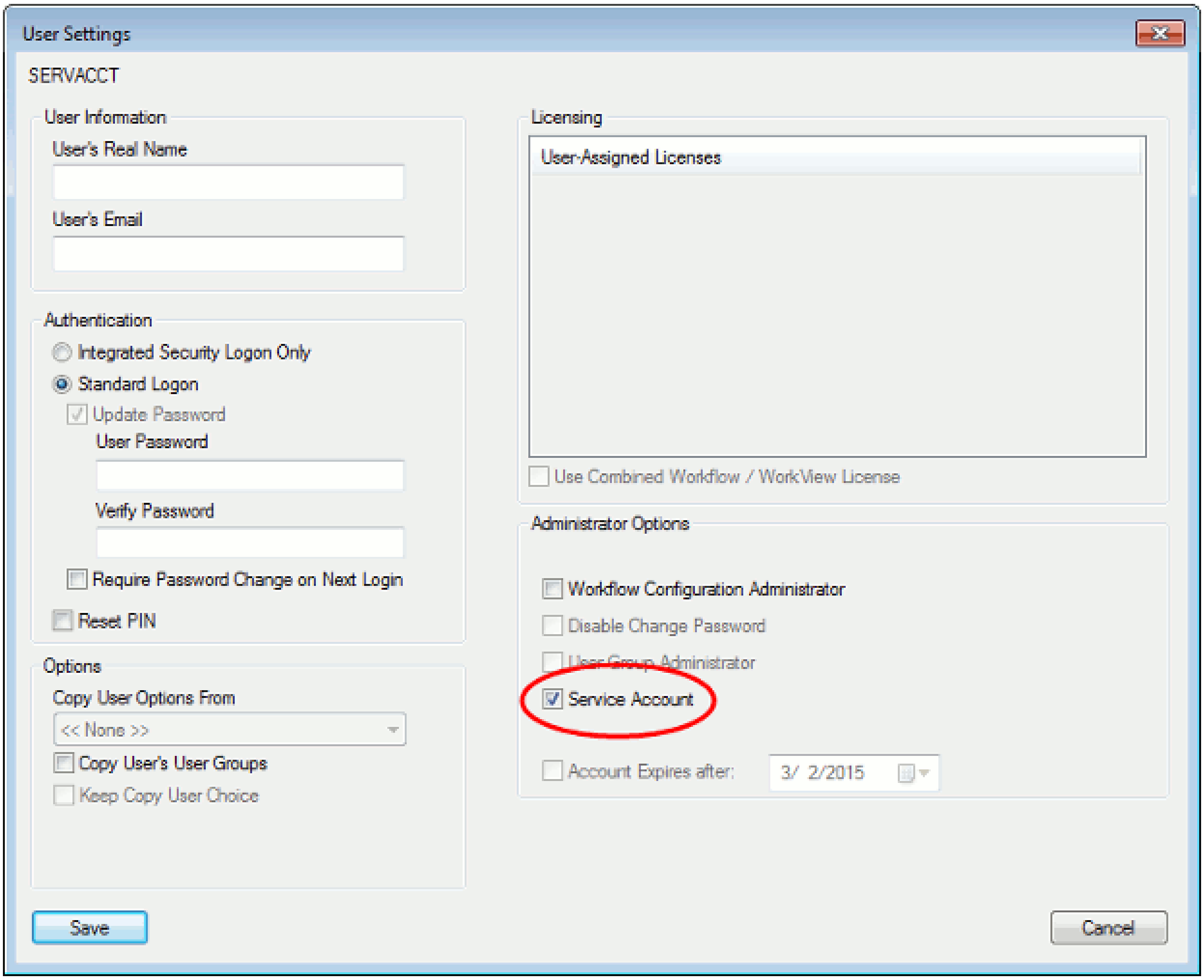


2. Enter a new user name in the field beneath the **User Name** list and click **Create**. The **User Settings** dialog box is displayed.

   You can also select an existing user account to designate as a service account, then click **Settings**. The **User Settings** dialog box is displayed.

3. Select the **Service Account** check box under **Administrator Options**.

   All options not applicable to a Service Account are disabled. Deselecting the **Service Account** check box for the existing user allows them to retain all rights and privileges that were previously assigned to them. Options in the **User Settings** dialog box are cleared when the **Service Account** check box is selected and must be reapplied when the check box is deselected.



Caution: The **Service Account** check box should never be selected with an account that is being used to run the OnBase Client (obclnt32.exe) as a Windows service.

Caution: Designating an existing user account as a **Service Account** removes the existing user from all User Groups and prevents the user from being added into a User Group. Users that are configured as service accounts will not be able to log into OnBase through standard interfaces. A Service Account also grants the user name full rights and privileges in OnBase.

4. Enter a **User Password** and repeat this password in the **Verify Password** field. If this is an existing user account and you need to change its password, select **Update Password** to enable these fields.

Note: The **Require Password Change on Next Login** setting cannot be selected for Service Accounts.

5. Click **Save**.

Installing the Multiserver and Printserver on the Processing Server

There are three methods of installing the Multiserver and Printserver on the processing server. Depending on which method you use, see the following sections:

- Installing the Multiserver or Printserver on page 29
- Installing Both the Multiserver and Printserver Simultaneously on page 33
- Installing the Multiserver and/or Printserver from the Command Line on page 36

Installing the Multiserver or Printserver

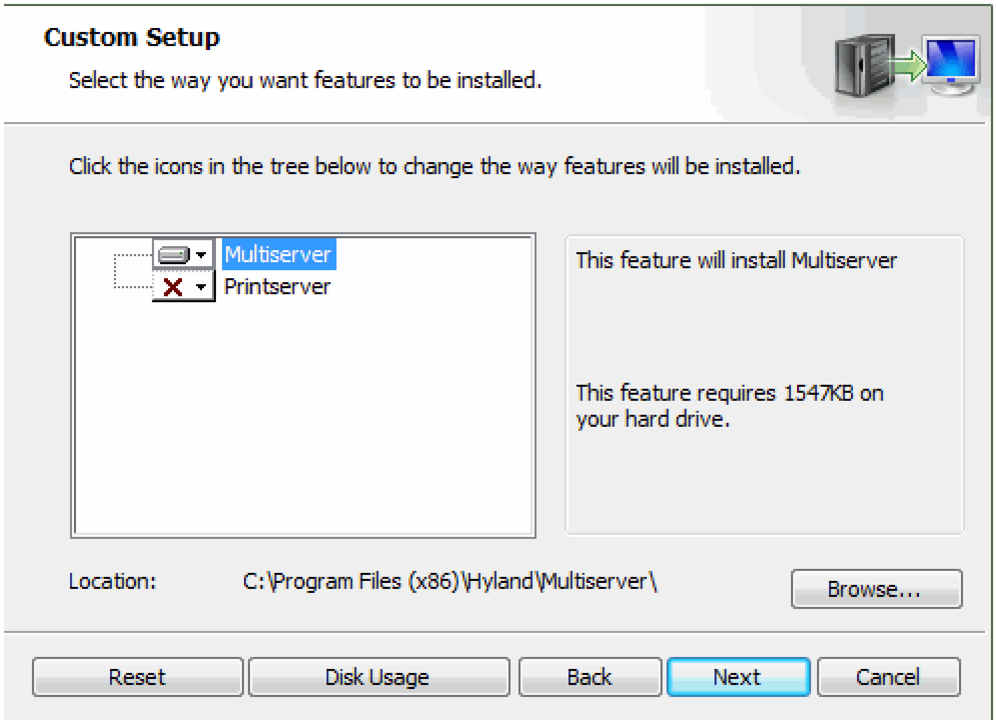
You can install either the Multiserver or the Printserver by using the **setup.exe** file located in the **\install\Multiserver** folder of your source installation files. Using this installer allows you to choose between installing both the Multiserver and Printserver components, or only the Multiserver component or the Printserver component.

If you are installing only the Multiserver or only the Printserver, the same installation procedures apply; however, be aware that not all screens or options described in the following procedure will be displayed by the Setup Wizard, or applicable when installing from the command line. If your solution includes multiple Meditech systems, separate Multiserver instances must be installed and configured for each Meditech system.

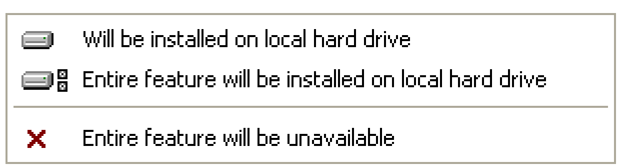
To install the Multiserver or Printserver:

1. Obtain the Hyland Multiserver Setup Wizard's executable (i.e., **setup.exe** or **Hyland Multiserver Meditech ODA.msi**) and copy it to your processing server.
2. Double-click the setup wizard's executable to launch it. The setup wizard's **Welcome** screen is displayed.

3. Click **Next**. The **Custom Setup** screen is displayed.



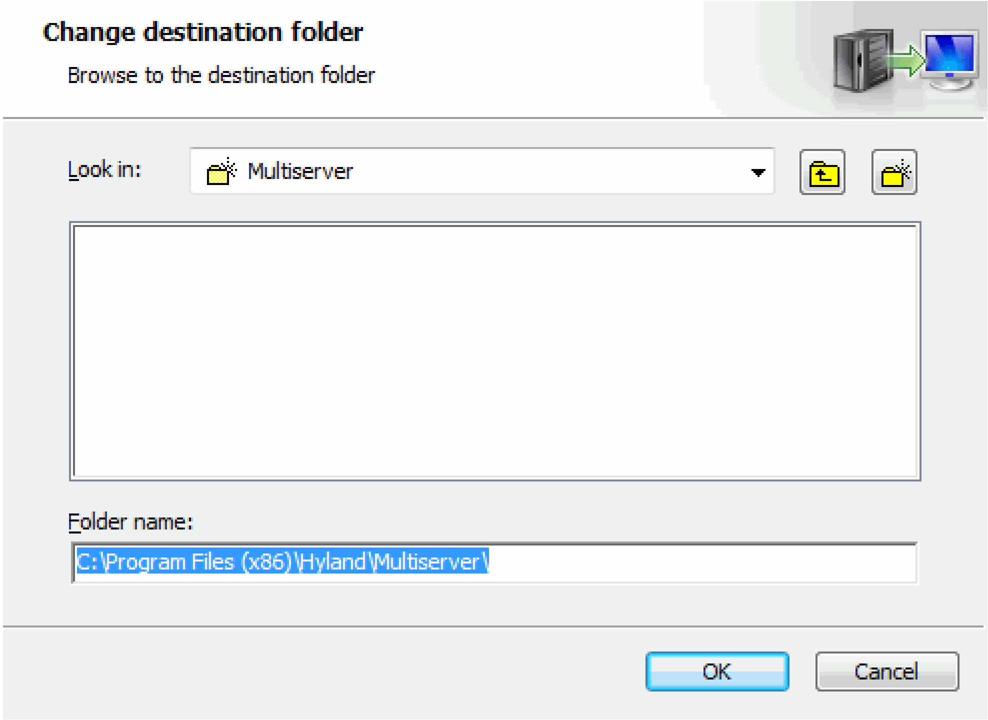
4. Click the drop-down select list next to each component (i.e., **Multiserver**, **Printserver**) to display the installation options.



Option	Description
Will be installed on local hard drive	Installs the selected feature and does not install any dependent optional functionality. To view optional functionality, click the **+** icon next to the feature to expand the sub feature list.
Entire feature will be installed on local hard drive	Installs the selected feature and any dependent functionality. To view the dependent functionality, click the **+** icon next to the feature to expand the sub feature list.
Entire feature will be unavailable	Select this option to remove a feature from the list of features to install.

5. Select **Will be installed on local hard drive** for each component you want to install.

   To install all components, select **Entire feature will be installed on local hard drive** from the drop-down select list beside the top-level component.
6. To determine the amount of space available for installation of the selected components, click **Disk Usage**. The **Disk Space Requirements** dialog is displayed, with information on the space required for the selected components and the space available on the drives accessible by the installation machine.
7. To change the installation location of a component:
   a. Select the component and click **Browse**. The **Change destination folder** dialog is displayed.



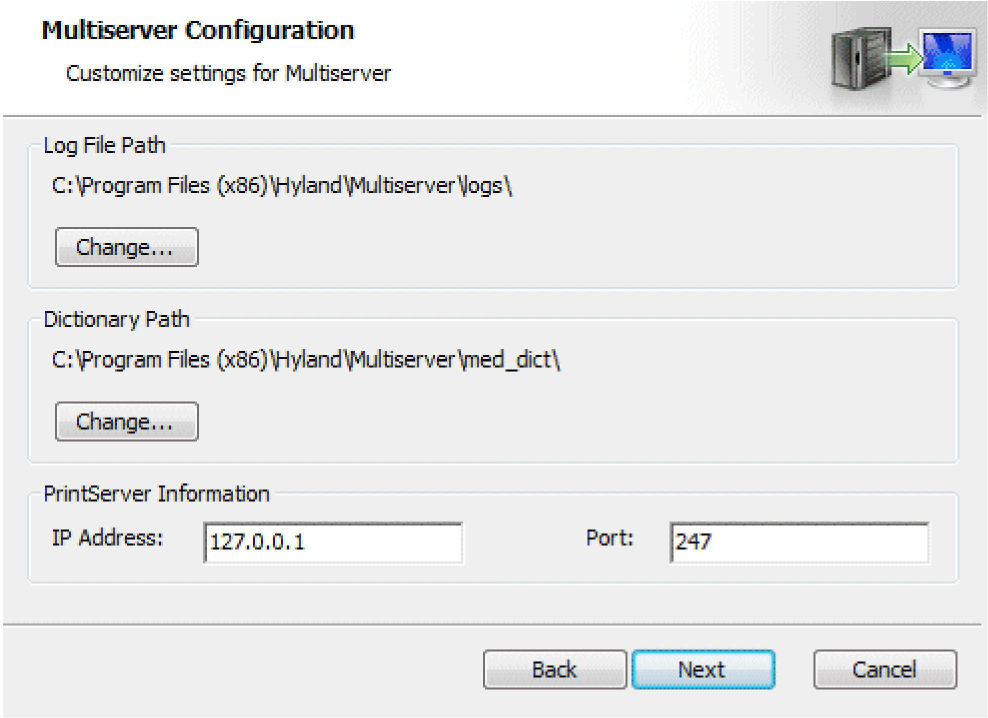
   b. Enter a **Folder name** in the field provided or select it from the **Look in** drop-down select list. If the destination folder is not changed, components are installed in the following locations by default.

   Hyland Multiserver:
   - **C:\Program Files\Hyland\Multiserver** (in a 32-bit environment)
   - **C:\Program Files (x86)\Hyland\Multiserver** (in a 64-bit environment)

   Hyland Printserver:
   - **C:\Program Files\Hyland\Printserver** (in a 32-bit environment)
   - **C:\Program Files (x86)\Hyland\Printserver** (in a 64-bit environment)

   c. Click **OK**. You are returned to the **Custom Setup** screen.

8. Click **Next**. The **Multiserver Configuration** screen is displayed.



9. By default, the Multiserver's log file is stored in one of the following locations:
   - **C:\Program Files\Hyland\Multiserver\logs** (in a 32-bit environment)
   - **C:\Program Files (x86)\Hyland\Multiserver\logs** (in a 64-bit environment)

   To specify another location for the log file, click **Change** and browse to the location where the log file is to be stored.
10. By default, the Multiserver's dictionary is stored in one of the following locations:
    - **C:\Program Files\Hyland\Multiserver\med_dict** (in a 32-bit environment)
    - **C:\Program Files (x86)\Hyland\Multiserver\med_dict** (in a 64-bit environment)

    To specify another location for the dictionary, click **Change** and browse to the location where the dictionary is to be stored.
11. Ensure that the **Printserver Information** is correct. If necessary, modify the **IP Address** and **Port** settings to point to the Printserver.
12. Click **Next**. The **Ready to install Hyland Multiserver Meditech ODA** screen is displayed.

    If you wish to create shortcuts to the Multiserver and/or Printserver on the Windows desktop, select **Create Desktop shortcut(s) when applicable**.
13. Click **Install** to begin the installation.
14. Once the installation is complete, click **Finish**.

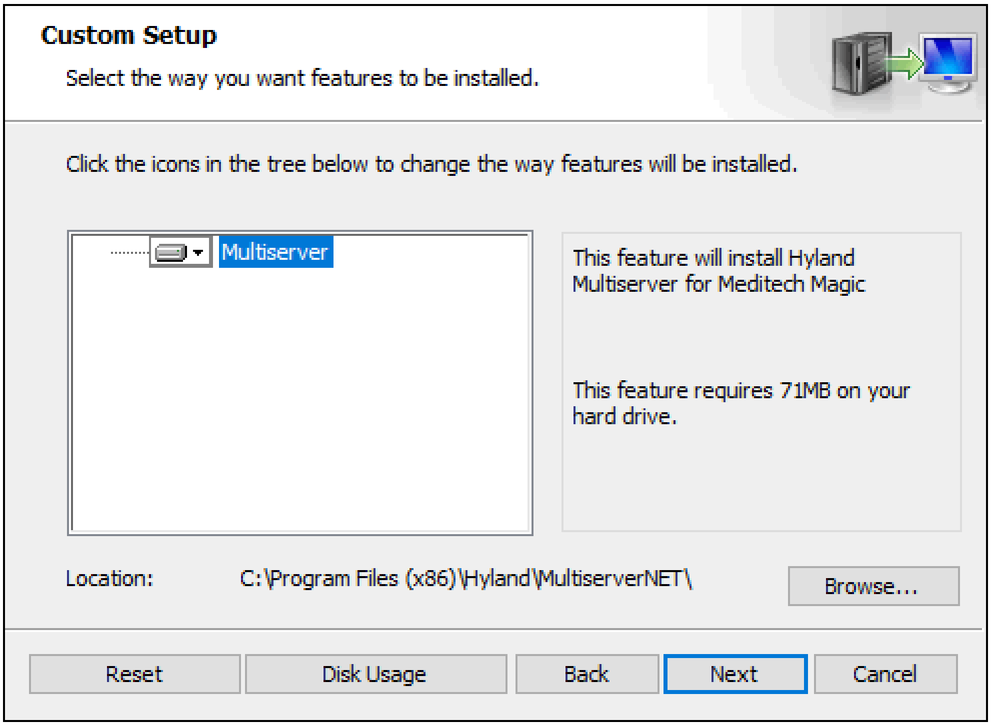
Installing Both the Multiserver and Printserver Simultaneously

Use the Hyland Multiserver Meditech ODA installer to install the Multiserver and Printserver on your OnBase processing server. For example, the same physical server on which the Hyland Meditech Release Service is installed. Using this installer will install both the Multiserver and Printserver.

Note: If your solution includes multiple Meditech systems, separate Multiserver instances must be installed and configured for each Meditech system.

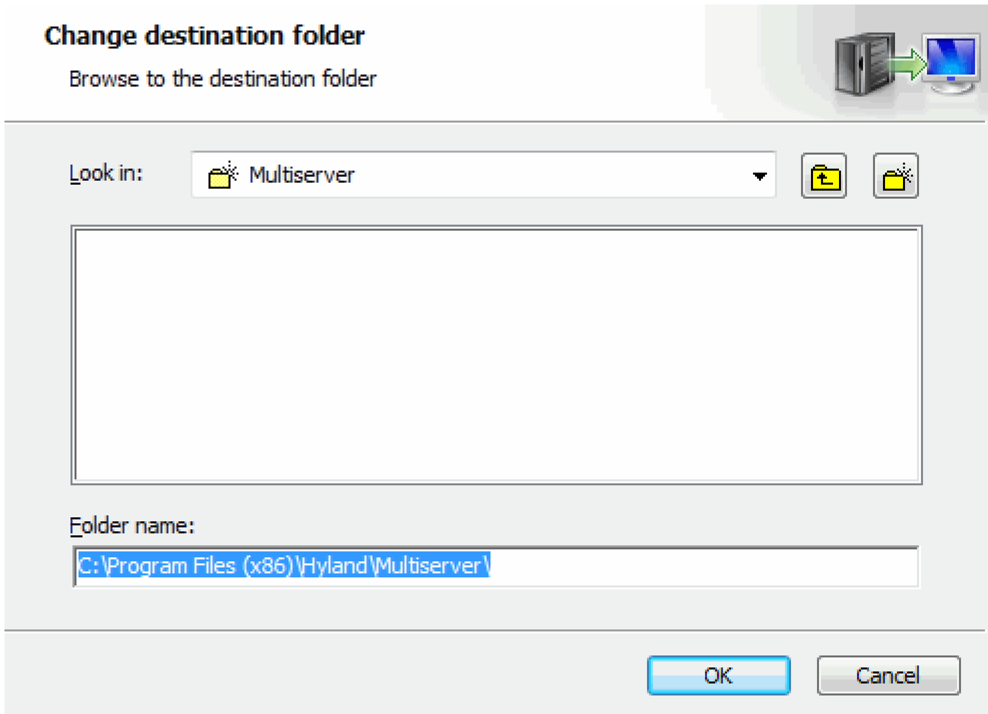
To install the Multiserver and Printserver:

1. Launch the installer by executing **setup.exe** or **Hyland Multiserver Meditech ODA.msi**. This file is usually located in the **\install\MultiserverNET** folder of your source installation files.
2. Click **Next**. The **Custom Setup** screen is displayed.



3. To determine the amount of space available for installation of the selected components, click **Disk Usage**. The **Disk Space Requirements** dialog is displayed, with information on the space required for the selected components and the space available on the drives accessible by the installation machine.

4. To change the installation location of a component:
   a. Select the component and click **Browse**. The **Change destination folder** dialog is displayed.



   b. Enter a **Folder name** in the field provided or select it from the **Look in** drop-down select list. If the destination folder is not changed, the Multiserver is installed in the following locations by default:
      - **C:\Program Files\Hyland\MultiserverNET** (in a 32-bit environment)
      - **C:\Program Files (x86)\Hyland\MultiserverNET** (in a 64-bit environment)

   c. Click **OK**. You are returned to the **Custom Setup** screen.
5. Click **Next**. The **Ready to install Hyland Multiserver Meditech ODA** screen is displayed.
   To create shortcuts to the Multiserver on the Windows desktop, select **Create Desktop shortcut(s) when applicable**.
6. Click **Install**.
7. Click **Finish**.

Configuring Multiserver Settings

Configure the following **OnBaseODAProvider** settings in the **Hyland.Integrations.Meditech.Multiserver.Net.dll.config** file. The location of this file is in one of the following default locations:

- **C:\Program Files\Hyland\MultiserverNET** (in a 32-bit environment)
- **C:\Program Files (x86)\Hyland\MultiserverNET** (in a 64-bit environment)

When all settings are configured, save the file and restart your application pool.

Setting	Description
url	The OnBase Application Server URL to connect to. The URL should follow the format of **http://localhost/AppServer/Service.asmx**, where **localhost** is the machine name of the Application Server. Both HTTP and HTTPS are allowed.
dataSource	The ODBC name of your configured OnBase database you want to connect to.
username	The user name of your OnBase service account.
password	The password of your OnBase service account.
externalSystemId	The value that identifies the configured External System. In OnBase Configuration, select **Utils | External Systems** and select the **Meditech Magic** external system entry. The **ID#** is displayed in the top right of the **External System Configuration** dialog box. By default, the Meditech Magic External System ID is 2.
facilityID	The value that identifies the configured facility you want to map OnBase to. In OnBase Configuration, select **Medical | Facilities | Facility Configuration** and select the facility you want to map to. The **ID#** is displayed at the top of the **Medical Facility Configuration** dialog box.

Configuring Printserver Settings

Configure the following **ODATCPServerDEC** settings in the **Hyland.Integrations.Meditech.Multiserver.Net.dll.config** file. The location of this file is in one of the following default locations:

- **C:\Program Files\Hyland\MultiserverNET** (in a 32-bit environment)
- **C:\Program Files (x86)\Hyland\MultiserverNET** (in a 64-bit environment)

When all settings are configured, save the file and restart your application pool.

Setting	Description
host	The local IP address of the machine on which the Printserver is installed.
port	The port on which the Printserver will listen. Typically, this is port 245.
printerConfigurationFilePath	The file path to the print.ini file.
useRemotePrintServer	Enter **true** for the **value** if the Printserver is installed on another machine, separate from the Multiserver.

Setting	Description
RemotePrintServer	Enter the IP address of the machine on which the Printserver is installed in the **host** attribute and the port number to be used for your remote print server in the **port** attribute (typically, port 245). This setting should only be configured if **useRemotePrintServer** is set to **true**.

Hyland.Logging Configuration Settings

You can configure Hyland logging settings in the **Hyland.Integrations.Meditech.Multiserver.Net.dll.config** file under the **Hyland.Logging** section. The location of this file is in one of the following default locations:

- **C:\Program Files\Hyland\MultiserverNET** (in a 32-bit environment)
- **C:\Program Files (x86)\Hyland\MultiserverNET** (in a 64-bit environment)

For more information on configuring logging for the Hyland Multiserver, see the Hyland.Logging section in the **Diagnostics Service and Diagnostics Console** module reference guide.

Installing the Multiserver and/or Printserver from the Command Line

The Hyland Multiserver Meditech ODA installer can be run from an installation CD or a local drive. If upgrading from a previous installation that used the Hyland Multiserver Meditech ODA installer, it is not necessary to uninstall the old components before running the installer.

Features and Property Names

The following sections describe the feature and property names that can be applied to the command line to install and configure components contained in the Hyland Multiserver Meditech ODA installer.

Features define the components that are installed. Properties define the configuration settings for the components that are installed.

Feature Names

You can control the installation of components from the command line using the **ADDLOCAL** property. To install a component, pass its feature name to installer using the **ADDLOCAL** property. The table below lists the properties that you can set during installation.

The **ADDLOCAL** property is appended to the end of the install command line, as shown here:

msiexec /i "Hyland Multiserver Meditech ODA.msi" ADDLOCAL=Multiserver

This example installs the Hyland Multiserver.

Note: Feature names are case sensitive and must be added to the command line exactly as they appear in this table. For details on the associated properties, see Property Names below.

Component	Feature Name
Multiserver	**Multiserver**
Printserver	**Printserver**

Property Names

When controlling the installation of components from the command line you must also configure the settings for each component you are installing by using the properties listed in the following table. The table below lists the property names available and the corresponding features that use them.

Property	Description
CREATE_DESKTOP_SHORTCUTS	This property is used to enable desktop shortcuts. To enable desktop shortcuts, set this property to **1**. To disable this option, leave this property empty. For example: **CREATE_DESKTOP_SHORTCUTS="1"** By default, this property is empty.
CREATE_MENU_SHORTCUTS	This property is used to enable menu shortcuts. To enable menu shortcuts, set this property to **1**. To disable this option, set this property to an empty string. For example: **CREATE_MENU_SHORTCUTS=""** By default, this property is set to **1**.
MULTISERVER_PRINTER_PORT	This property is used to specify the port the Multiserver will use to communicate with the Printserver. For example: **MULTISERVER_PRINTER_PORT="247"**
MULTISERVER_PRINTSERVERIP	This property is used to specify the IP address of the Multiserver's computer. For example: **MULTISERVER_PRINTSERVERIP="127.0.0.1"**
PRINTSERVER_LISTENING_PORT	This property is used to specify the port the Printserver will use to listen for communication from the Multiserver. For example: **PRINTSERVER_LISTENING_PORT="247"**

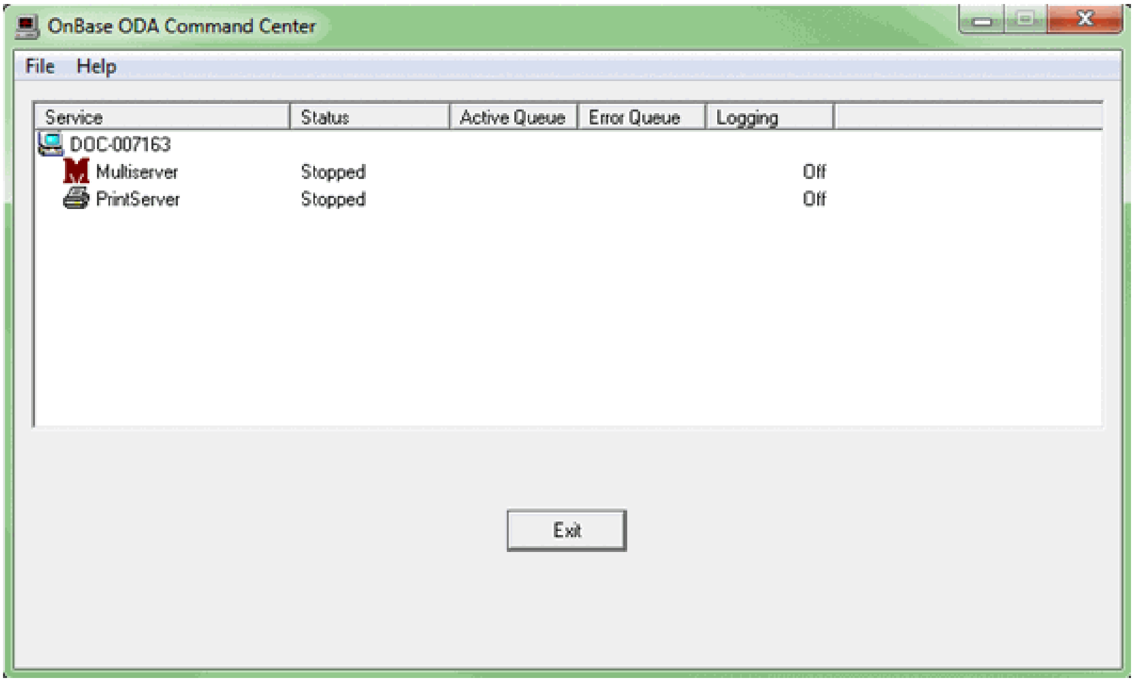
Property	Description
PRINTSERVER_MULTISERVERIP	This property is used to specify the IP address of the Printserver's computer. For example: **PRINTSERVER_MULTISERVERIP="127.0.0.1"**

Starting the Multiserver & Printserver Services

Once installed, the Hyland Multiserver and Printserver run as services on the processing server. You must start these services from the OnBase ODA Command Center prior to using your OnBase for Meditech solution.

Note: These services should NOT be started and stopped in Windows.

1. From the processing server, double-click on the **Multiserver Command Center** shortcut on the desktop. The **OnBase ODA Command Center** window is displayed.



2. Start the Multiserver by right-clicking on it and selecting **Start**.
3. If you have also installed the Printserver, start it by right-clicking on it and selecting **Start**.

Tip: For more information on configuring and managing the Multiserver and Printserver, see Configuring and Managing the Hyland Multiserver & Printserver on page 134.

The OnBase for Meditech Viewer

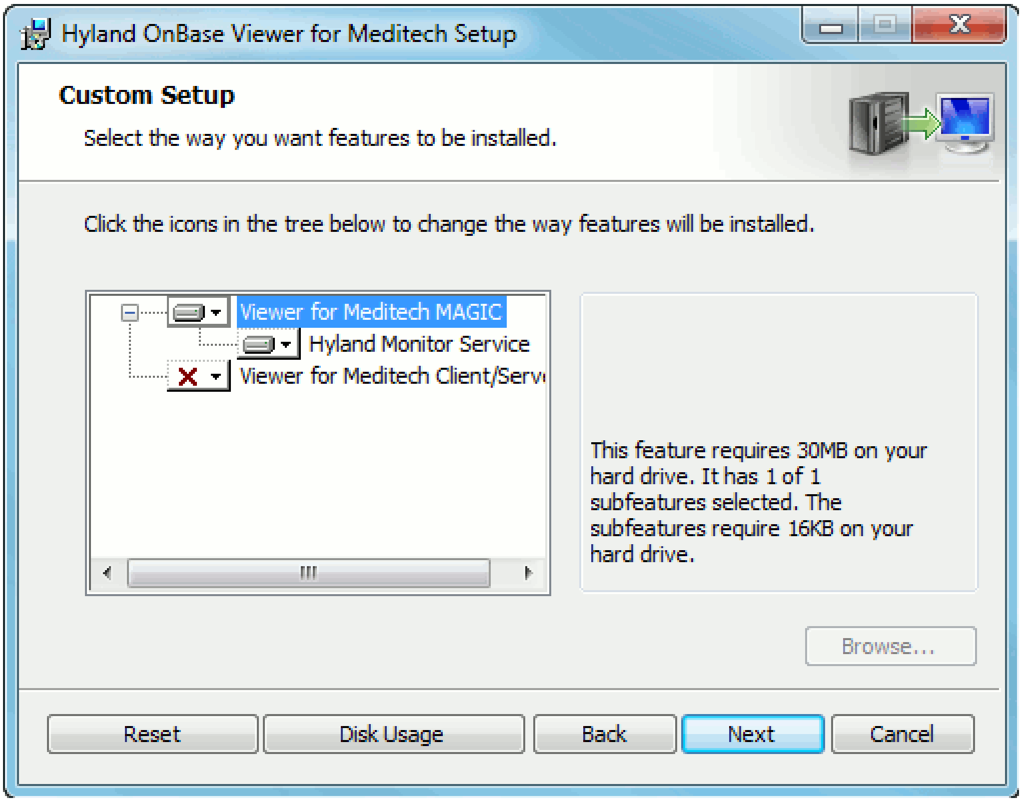
Installing the OnBase for Meditech Viewer via the Setup Wizard

1. Obtain the Hyland OnBase Viewer for Meditech Setup Wizard's executable (for example, **Hyland OnBase Viewer for Meditech.msi**) and copy it to your processing server.
2. Double-click the setup wizard's executable to launch it.

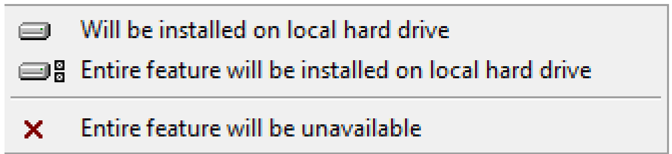
Note: You must run the **Hyland OnBase Viewer for Meditech.msi** executable using administrative privileges.

The setup wizard's **Welcome** screen is displayed.

3. Click **Next**. The **Custom Setup** screen is displayed.



4. Click the drop-down select list next to each component (i.e., **Viewer for Meditech MAGIC**, **Viewer for Meditech Client/Server**) to display the installation options:



Option	Description
Will be installed on local hard drive	Installs the selected feature and does not install any dependent, optional functionality. To view optional functionality, click the **+** icon next to the feature to expand the sub feature list.
Entire feature will be installed on local hard drive	Installs the selected feature and any dependent functionality. To view the dependent functionality, click the **+** icon next to the feature to expand the sub feature list.
Entire feature will be unavailable	Select this option to remove a feature from the list of features to install.

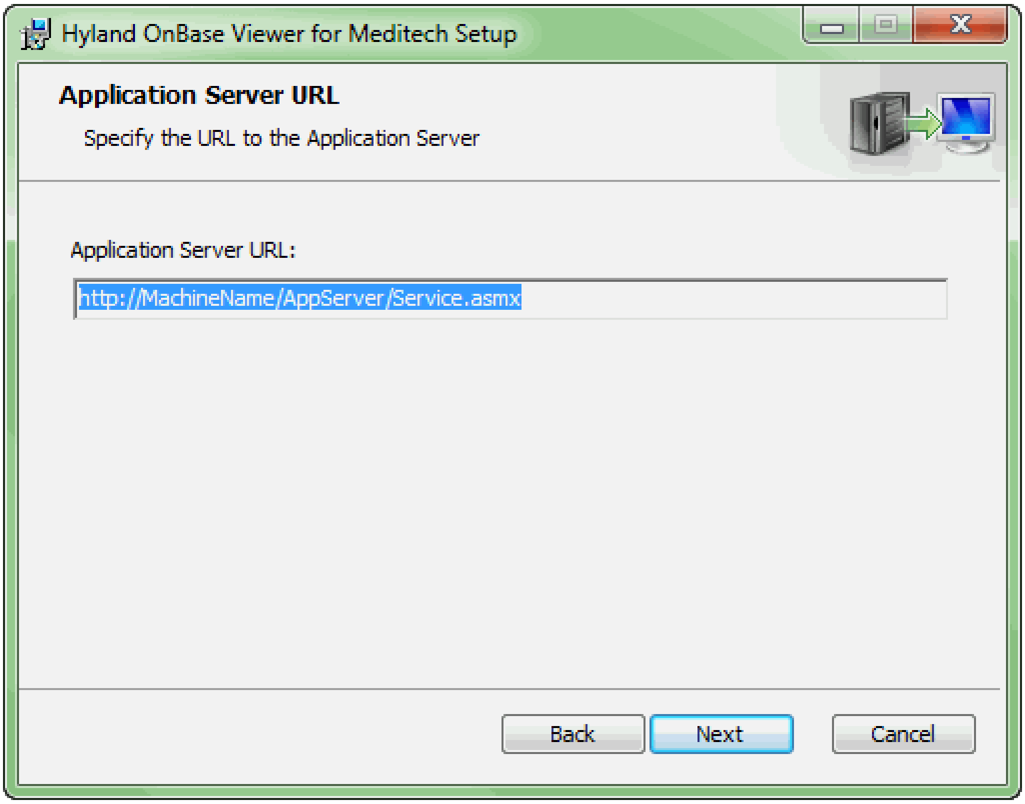
5. Select **This feature will be installed on local hard drive** for each component you want to install.

   To install all components, select **Entire feature will be installed on local hard drive** from the drop-down select list beside the top-level component.

Note: It is recommended that the **Hyland Monitor Service** feature is installed when using Meditech Magic version 4.25 or later.

6. To determine the amount of space available for installation of the selected components, click **Disk Usage**. The **Disk Space Requirements** dialog is displayed, with information on the space required for the selected components and the space available on the drives accessible by the installation machine.

7. Note that the **Browse...** button is disabled. This is because all files associated with the selected component must only be installed in one of the following locations to function properly. The location appropriate for your version of Meditech and your Windows operating system is automatically selected by the setup wizard.
   - Viewer for Meditech Magic:
     - **C:\Program Files\Meditech\Workstation4.x** (when installing on a 32-bit server)
     - **C:\Program Files (x86)\Meditech\Workstation4.x** (when installing on a 64-bit server)
   - Viewer for Meditech Client/Server:
     - **C:\Program Files\Valco Data Systems\ValcoViewer** (when installing on a 32-bit server)
     - **C:\Program Files (x86)\Valco Data Systems\ValcoViewer** (when installing on a 64-bit server)
8. Click **Next**. The **Application Server URL** dialog is displayed.



   In the **Application Server URL** field, enter the full URL to the OnBase Application Server (e.g., **http://MachineName/AppServer/Service.asmx**).
9. Click **Next**. The **Ready to install Hyland OnBase Viewer for Meditech** screen is displayed.
10. Click **Install** to install the selected components.
11. When the installation is complete, click **Finish**.

Installing the OnBase for Meditech Viewer from the Command Line

The Hyland OnBase Viewer for Meditech installer can be run from an installation CD or a local drive. If upgrading from a previous installation that used the Hyland OnBase Viewer for Meditech installer, it is not necessary to uninstall the old components before running the installer.

Features and Property Names

The following sections describe the feature and property names that can be applied to the command line to install and configure components contained in the Hyland OnBase Viewer for Meditech installer.

Features define the components that are installed. Properties define the configuration settings for the components that are installed.

Feature Names

You can control the installation of components from the command line using the **ADDLOCAL** property. To install a component, pass its feature name to installer using the **ADDLOCAL** property. The table below lists the properties that you can set during installation.

The **ADDLOCAL** property is appended to the end of the install command line, as shown here:

msiexec /i "Hyland OnBase Viewer for Meditech.msi" ADDLOCAL=TViewer_Magic

This example installs the OnBase Viewer for Meditech Magic.

Note: Feature names are case sensitive and must be added to the command line exactly as they appear in this table. For details on the associated properties, see Property Names on page 43.

Component	Feature Name
Viewer for Meditech MAGIC	**TViewer_Magic**
Viewer for Meditech Client/Server	**TViewer_ClientServer**

Property Names

When controlling the installation of components from the command line you must also configure the settings for each component you are installing by using the properties listed in the following table. The table below lists the property names available and the corresponding features that use them.

Property	Description
APPLICATION_SERVER_URL	This property is used to set the URL to the **Service.asmx** page of the Application Server. For example: **APPLICATION_SERVER_URL="http://localhost/AppServer/Service.asmx"**

Command Line Switches

There are no command line switches specific to the OnBase for Meditech with ODA solution.

INI Options

There are no onbase32.ini settings specific to the OnBase for Meditech with ODA solution.

Application Server Web.Config Settings

There are no settings specific to the OnBase for Meditech with ODA solution in the Application Server's web.config file.

Backup/Recovery

Backup

Configuration

Configuration information for your OnBase for Meditech solution is stored in:

- **The OnBase Database**. Configuration information for the components of your OnBase solution, (e.g., Disk Groups, Keyword Types, Document Types, and User Groups), the external system parameters that allow OnBase to communicate with Meditech, and the Hyland Meditech Release Service are stored in your OnBase database.
- **The OnBase Application Server's Web.Config File**. Configuration information for your OnBase Application Server is stored in its web.config file.

- **The Hyland Meditech Release Service's Hyland.Integrations.Meditech.Release.Service.Exe.Config File**. Configuration information for the HMRS is stored in the Hyland.Integrations.Meditech.Release.Service.exe.config file.
- **The Hyland Multiserver's Mltservc.Exe.Config File**. Configuration information for the Multiserver is stored in the mltservc.exe.config file.

Proper backups of all of these items will contain all configuration information necessary for your OnBase for Meditech solution.

Registry Settings

The following registry settings are used by your OnBase for Meditech solution. Note their values for backup purposes.

Caution: Modify the registry at your own risk. Incorrectly editing the Windows registry can cause serious problems that may require you to reinstall your operating system. Be sure to back up the registry before making any changes to it. For more registry information, see the following Microsoft articles: http://support.microsoft.com/kb/256986 and http://technet.microsoft.com/en-us/library/cc725612.aspx

The Hyland Multiserver

DictionaryPath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\DictionaryPath

ListeningPort

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\ListeningPort

LogFilePath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\LogFilePath

TraceVerbosity

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\TraceVerbosity

PrinterPort

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\PrinterPort

PrinterServerIP

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\PrintServerIP

Type

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Type

Start

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Start

ErrorControl

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\ErrorControl

ImagePath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\ImagePath

DisplayName

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\DisplayName

ObjectName

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\ObjectName

O

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Enum\0

Count

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Enum\Count

NextInstance

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Enum\NextInstance

The Hyland Printserver

ListeningPort

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\ListeningPort

LogFilePath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\LogFilePath

PrintImagesPath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\PrintImagesPath

PrintIniFile

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\PrintIniFile

TraceVerbosity

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\TraceVerbosity

MultiserverIP

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\MultiserverIP

MultiserverPort

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\MultiserverPort

Type

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\Type

Start

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\Start

ErrorControl

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\ErrorControl

ImagePath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\ImagePath

DisplayName

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\DisplayName

ObjectName

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\ObjectName

External Files

All of your Application Server, HMRS, Multiserver, Printserver, and OnBase for Meditech Viewer installation files should be regularly backed up.

For a clean installation of your OnBase for Meditech solution, ensure you have backups of the installers used to install the Application Server, HMRS, Multiserver and Printserver, and the OnBase for Meditech Viewer.

Module-Related .INI and Web.Config Settings

There are no onbase32.ini or web.config settings specific to your OnBase for Meditech solution.

Ensure that the onbase32.ini file is regularly backed up on workstations used to access the OnBase Client or Configuration module.

Additional Steps

Contact your Meditech solution provider for information on backing up your Meditech solution.

When backing up your Meditech solution, ensure that the Hyland Meditech Listener is also backed up.

Recovery

Configuration

Configuration information is stored in:

- The OnBase database
- The OnBase Application Server's web.config file
- The Hyland Meditech Release Service's Hyland.Integrations.Meditech.Release.Service.exe.config file
- The Hyland Multiserver's mltservc.exe.config file

Restoring these items from valid backups will restore all configuration information.

Registry Settings

The following registry settings are used by your OnBase for Meditech solution. Restore them using their noted backup values.

Caution: Modify the registry at your own risk. Incorrectly editing the Windows registry can cause serious problems that may require you to reinstall your operating system. Be sure to back up the registry before making any changes to it. For more registry information, see the following Microsoft articles: http://support.microsoft.com/kb/256986 and http://technet.microsoft.com/en-us/library/cc725612.aspx

The Hyland Multiserver

DictionaryPath

On a 32-bit or 64-bit workstation, this registry setting is located here:

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ListeningPort

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\ListeningPort

LogFilePath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\LogFilePath

TraceVerbosity

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\TraceVerbosity

PrinterPort

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\PrinterPort

PrinterServerIP

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\PrintServerIP

Type

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Type

Start

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Start

ErrorControl

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\ErrorControl

ImagePath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\ImagePath

DisplayName

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\DisplayName

ObjectName

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\ObjectName

O

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Enum\0

Count

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Enum\Count

NextInstance

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Multiserver\Enum\NextInstance

The Hyland Printserver

ListeningPort

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\ListeningPort

LogFilePath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\LogFilePath

PrintImagesPath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\PrintImagesPath

PrintIniFile

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\PrintIniFile

TraceVerbosity

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\TraceVerbosity

MultiserverIP

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\MultiserverIP

MultiserverPort

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\MultiserverPort

Type

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\Type

Start

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\Start

ErrorControl

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\ErrorControl

ImagePath

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\ImagePath

DisplayName

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\DisplayName

ObjectName

On a 32-bit or 64-bit workstation, this registry setting is located here:

- HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Hyland_Printserver\ObjectName

External Files

The OnBase Application Server, the Hyland Meditech Release Service, the Hyland Multiserver, the Hyland Printserver, and the OnBase for Meditech Viewer must all be restored from valid backups of their installation files.

If this is not possible, you can re-install these items using their respective installers. If possible, restore their configuration information from valid backups to avoid having to reconfigure each component.

When re-installing these components via their respective installers, ensure that you are using the installer from the build of OnBase you are restoring (e.g., 11.1.0.31).

Module-Related .INI and Web.Config Settings

There are no onbase32.ini or web.config settings specific to your OnBase for Meditech solution.

Ensure that the onbase32.ini file is restored from the last-known valid backup copy on workstations used to access the OnBase Client or Configuration module.

Registration

The licenses used by your OnBase for Meditech solution are not registered to individual workstations or servers and will not need to be re-registered on new machines.

Additional Steps

If necessary, contact your Meditech solution provider for information on restoring your Meditech solution.

Once your Meditech solution has been restored, contact your OnBase solution provider for information on restoring the Hyland Meditech Listener.

Troubleshooting

The following sections discuss common troubleshooting issues that can occur when using OnBase for Meditech.

Scanned Documents are Not Being Released to Meditech

If you are experiencing scanned documents not getting released to Meditech despite correct configuration of the Document Types and the Hyland Meditech Release Service, ensure that the batch associated with the documents (for example, the batch to which the documents were scanned) was committed. Documents cannot be released from OnBase to Meditech until they are committed.

Viewer is Not Opening

The OnBase for Meditech Viewer cannot open if you have configured logging in your **t_viewerApp.exe.config** file. If a user does not have permission to access the directory you have specified in the **LogFileLocation** key, that user is unable to use the OnBase for Meditech Viewer. You can resolve this issue by performing one of the following actions:

- Modify your **t_viewerApp.exe.config** file so that the **LogFileLocation** option points to a location that all of your users have rights to (specifically, users must have Windows **Write** and **Modify** permissions for the specified folder).
- Turn off logging completely by modifying your **t_viewerApp.exe.config** file so that the **LogFileLocation** option is blank.

Hyland Meditech Release Service is Not Releasing Documents

This issue can occur if the Application Server was restarted and the Hyland Meditech Release Service (HMRS) was not restarted. It is possible that the HMRS will show that it is currently running despite not releasing any documents.

If the Application Server was restarted, you must also restart the HMRS. You can restart the HMRS from the Windows Services utility.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

Hyland ActiveX Controls Installers

The ActiveX controls needed to successfully operate the OnBase Web Client are installed automatically via the Web Server upon first use, when the Web Server is included as part of an installation.

Under certain security policies, or for various other reasons, these controls may not be available for download and installation from the Web Server. Some integrations may also require ActiveX controls that are not installed via the Web Server, or the Web Server may not be part of the overall solution. In these situations, the necessary ActiveX controls can be installed using one of the separate Hyland ActiveX Controls installers:

- **Hyland Web ActiveX Controls Installer:** Installs the controls required by the Web Client and dependent modules.
- **Hyland ActiveX Integration Controls:** Installs the controls required by some integrations.

This chapter contains details on running both installers.

Overview

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.

OnBase installers may consist of both an executable file (**.exe**) and a Windows Installer Package file (**.msi**). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

Note: The Microsoft .NET Framework prerequisite must always be installed separately before running either the EXE or MSI installer.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

For more information about configuring a silent installation, see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

ClickOnce Installers — Some OnBase modules are installed for deployment using ClickOnce. ClickOnce is a Microsoft technology that installs a deployment package to a central server. This package can then be accessed by users to install the application on their local workstations. The application is installed entirely under the user's profile, ensuring that it cannot interfere with other applications installed on the workstation.

ClickOnce deployments also have the following advantages:

- Previously installed versions of the module can be easily and automatically updated to the latest version with little or no user interaction, as long as the deployment server and deployment instance name are not changed.
- The module is installed on a per-user basis and does not require administrator privileges for local installation.
- There can be multiple instances of the module deployed, allowing for different versions of the module to be installed on a per-user basis, to match the version requirements of the workstation it is being installed to.

For more information on Microsoft's ClickOnce technology see https://docs.microsoft.com/en-us/visualstudio/deployment/clickonce-security-and-deployment.

Note: ClickOnce-deployed applications are not supported by Microsoft within a Remote Desktop environment.

OnBase modules that are deployed using ClickOnce should either take advantage of the ClickOnce deployment method as an alternative to a Remote Desktop deployment, or the module should be installed using a standard installer and deployed using the Remote Desktop methodology.

Note: Not all OnBase modules that support ClickOnce have a standard installer available. Contact your first line of support if you are unsure how to install and deploy a specific module.

User Account Control (UAC) — If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

Silent Installation Using setup.exe — If you are running setup.exe silently from the command line you must use the **/q** switch and the **/CompleteCommandArgs** switch, followed by the required command-line arguments.

The **q** switch specifies quiet mode and is required to suppress the GUI. The **CompleteCommandArgs** switch must be followed by the command-line parameters required to configure and install the desired components.

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using ****. For example: **setup.exe /q /CompleteCommandArgs "INSTALL_PROPERTY=\"my value\" INSTALL_PROPERTY_2=\"my value 2\""**.

Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

Installer Prerequisites

The installer must be run on operating systems that support the Windows® Installer 3.0+ architecture.

The installer setup executable (**setup.exe**) detects most of the prerequisites for the module that are also required for installation and installs them, if necessary. If the installer fails to run, install all of the requirements for the module separately before relaunching the installer. Module requirements can be found in the installation chapters of the corresponding module reference guides.

Note: If installation is being performed using the installer MSI file, the requirements for the module must be installed before launching the installer.

Installer User Permissions

You must be logged on to the installation machine with administrator privileges in order to run the installer.

If installing under Windows operating systems with UAC enabled, the installer must be run with elevated administrator privileges, even if the user currently logged in is an administrator.

Installer .NET Framework Requirements

The installer must be run on a machine that meets the .NET Framework requirements of the module being installed. Module requirements can be found in the installation chapters of the corresponding module reference guides.

OnBase requires Microsoft .NET Framework 4.7.2 or later. The .NET Framework can be obtained from the Microsoft Download Center at http://www.microsoft.com/downloads.

Windows User Account Control Statement

Hyland Software is dedicated to ensuring that OnBase is compatible with Windows User Account Control (UAC). UAC is a feature of Windows operating systems that was introduced with Windows Vista. It limits the ability of standard users to make global system changes to a workstation and prevents malicious software from making unauthorized changes to protected areas.

For details on UAC, refer to your Microsoft support information or see http://technet.microsoft.com/en-us/library/cc709691(WS.10).aspx.

You may encounter UAC in OnBase when:

- Installing or uninstalling OnBase, OnBase modules, or OnBase ActiveX controls.
- Copying, moving, or saving files to the Program Files directory, Windows directory, or another protected location.
- Modifying system-wide settings, such as the registry.
- Re-indexing a document or opening a scanned batch using published Internet Explorer from a Remote Desktop Server.

If Windows UAC is enabled, the above operations may prompt for administrator privileges or credentials, even if an administrator is currently logged on.

Hyland Web ActiveX Controls Installer

The ActiveX controls needed to successfully operate the OnBase Web Client are installed automatically via the Web Server upon first use, when the Web Server is included as part of a Core installation.

Under certain security policies, or for various other reasons, these controls may not be available for download and installation from the Web Server. In these situations, the necessary ActiveX controls can be installed using the Web ActiveX Controls installer.

The Web ActiveX Controls installer installs the following files and controls:

- AEXCommServer.dll
- OBXWebControls*.ocx
- dmimage_web*.dll
- dmlocale_web*.dll
- dmmailsvc_web*.dll
- dmtrace_web*.dll

The Hyland Web ActiveX Controls installer uses an installation wizard that is located in the OnBase installation directory, typically under **\install\Web ActiveX Controls**.

Running the Installer

To launch the wizard, double-click **Hyland Web ActiveX Controls.msi**. The **Hyland Web ActiveX Controls** welcome screen is displayed.

Note: In order to ensure that the Web pages are able to instantiate the methods they need within the controls, the installation location of the Web ActiveX controls is added to the system **PATH** environment variable. This means the installer may have to be deployed by a local administrator in order to complete a successful installation.

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1. Click **Next**. The **Destination Folder** dialog is displayed.
2. Choose a location to install the ActiveX controls. The default location is **C:\Program Files\Hyland\Web ActiveX**. Click **Change...** to install the controls to a different location.

Note: Under 64-bit systems, use the **Program Files (x86)** folder.

---

3. Click **Next**. The **Ready to Install the Program** dialog is displayed.
4. Click **Install** to proceed with the installation or click **Cancel** to exit the installation. Click **Back** to change the values entered in previous dialogs.
5. Click **Finish** to complete the installation.

Controlling Installation from the Command Line

To run the Hyland Web ActiveX Controls installer from the command line, it must be launched using this command: **msiexec /i "Hyland Web ActiveX Controls.msi"**

Note: In order to ensure that the Web pages are able to instantiate the methods they need within the controls, the installation location of the Web ActiveX controls is added to the system **PATH** environment variable. This means the installer may have to be deployed by a local administrator in order to complete a successful installation.

Optional Command Line Switches

The Web ActiveX Controls installer can be run with the following switches:

- **WEBACTIVEXCONTROLS_FILES**: This is the location to which the controls are installed. By default, they are installed to **C:\Program Files\Hyland\Web ActiveX**.

  Use this switch to enter a different location to install the controls, for example:

  msiexec /i "Hyland Web ActiveX Controls.msi" WEBACTIVEXCONTROLS_FILES="C:\MyCustomFolder\Hyland ActiveX\"

Note: Under 64-bit systems, use the **Program Files (x86)** folder.

Change, Repair, or Remove an Installation

After initial installation, the setup program can be used to change, repair, or remove components from a previous installation. After launching **setup.exe** or the ***.msi** installation package, and clicking **Next** at the welcome dialog, the **Change, repair, or remove installation** dialog box is displayed.

Select the option for the actions you wish to perform:

Option	Description
Change	Add or remove components using the **Custom Setup** dialog. **Note:** This option is not available if the installer has no independently selectable features. The steps for adding selected components are the same as those under the Component Selection section of the installation instructions, if applicable to the installer. **Note: Change** does not allow you to alter configuration options originally set during a previous installation of components contained in the installer.
Repair	Repair errors in the most recent installation of the component, such as missing and corrupt files, shortcuts, and registry entries. **Note:** This option is not available from all installers. **Repair** does not include errors made in the configuration options set by the user during installation. For specific troubleshooting information regarding an installed component, see the module reference guide for that component.
Remove	Removes all previously installed components.

Hyland ActiveX Integration Controls

Some integrations require ActiveX controls that are not installed via the Web Server, or the Web Server is not included as part of the overall solution. In these situations, the required ActiveX controls can be installed using the separate Hyland ActiveX Integration Controls installer.

The Hyland ActiveX Integration Controls installer installs the following files and controls:

- dmimage_alt.dll
- dmlocale_alt.dll
- dmmailsvc_alt.dll
- dmtrace_alt.dll

- OBXAltDocumentSelect.ocx (32-bit) / HylandDocumentSelect.ocx (64-bit)
- OBXAltViewer.ocx (32-bit) / HylandViewer.ocx (64-bit)

The Hyland ActiveX Integration Controls installer uses an installation wizard that is located in the OnBase installation directory, typically under **\install\ActiveX Integration Controls**.

Running the Installer

To launch the wizard, double-click **Hyland ActiveX Integration Controls.msi**. The **Hyland ActiveX Integration Controls** welcome screen is displayed.

1. Click **Next**. The **Ready to Install the Program** dialog is displayed.
2. Click **Install** to proceed with the installation or click **Cancel** to exit the installation. Click **Back** to change the values entered in previous dialogs.
3. Click **Finish** to complete the installation.

Note: In order to ensure that the integrations are able to instantiate the methods they need within the controls, the installation location of the Hyland ActiveX Integration Controls is always **C:\Program Files\Hyland\Alt ActiveX**. Under 64-bit systems, the **Program Files (x86)** folder is used.

Controlling Installation from the Command Line

To run the Hyland Web ActiveX Controls installer from the command line, it must be launched using this command: **msiexec /i "Hyland ActiveX Integration Controls.msi"**.

Note: In order to ensure that the integrations are able to instantiate the methods they need within the controls, the installation location of the Hyland ActiveX Integration Controls is always **C:\Program Files\Hyland\Alt ActiveX**. Under 64-bit systems, the **Program Files (x86)** folder is used.

Change, Repair, or Remove an Installation

After initial installation, the setup program can be used to change, repair, or remove components from a previous installation. After launching **setup.exe** or the ***.msi** installation package, and clicking **Next** at the welcome dialog, the **Change, repair, or remove installation** dialog box is displayed.

Select the option for the actions you wish to perform:

Option	Description
Change	Add or remove components using the **Custom Setup** dialog. **Note:** This option is not available if the installer has no independently selectable features. The steps for adding selected components are the same as those under the Component Selection section of the installation instructions, if applicable to the installer. **Note: Change** does not allow you to alter configuration options originally set during a previous installation of components contained in the installer.
Repair	Repair errors in the most recent installation of the component, such as missing and corrupt files, shortcuts, and registry entries. **Note:** This option is not available from all installers. **Repair** does not include errors made in the configuration options set by the user during installation. For specific troubleshooting information regarding an installed component, see the module reference guide for that component.
Remove	Removes all previously installed components.

OnBase for Meditech with ODA Best Practices

The following best practice recommendations were assembled by a team of OnBase subject matter experts. They represent the accumulation of years of experience installing and configuring OnBase solutions.

The following recommendations are general in nature, and are applicable to most OnBase solutions and network environments. Depending on your solution design and your organization's needs, not all of the best practice recommendations listed below may apply to, or be recommended for, your OnBase solution.

Carefully consider the impact of making any changes, including those listed below, to your OnBase solution prior to implementing them in a production environment.

Installation

Starting & Stopping the Hyland Multiserver & Printserver

It is considered a best practice to start and stop the Hyland Multiserver and Printserver services only in the OnBase ODA Command Center.

Upgrade Considerations

When upgrading from a version before OnBase 14, documents will not be retrievable if they are from an External System other than Meditech Magic (External System #2). If upgrading and documents are from an External System other than Meditech Magic, a data conversion is required before retrieval is possible. Contact your first line of support before upgrading from a version earlier than OnBase 14.

Configuration

Configuring OnBase

The following are best practices when configuring Document Types:

- It is considered a best practice that all OnBase Document Types be named using the following naming convention, based on the Meditech forms that they correspond to:

  <Meditech Form #> - <Meditech Form Description>. For example, **031 - Patient Consent to Treatment** where the Document Type corresponds to Meditech Form #031, a patient consent to treatment form.

- It is considered a best practice that the four required OnBase for Meditech Keyword Types (**Medical Record Number**, **Account Number**, **Document Date**, and **Meditech Retrieval ID**) be configured as Required Keyword for all of your Document Types.

Configuring & Managing the Hyland Multiserver & Printserver

It is considered a best practice to configure and manage the Hyland Multiserver and Printserver services only in the Multiserver Command Center.

Configuring Service Recovery Settings

It is considered a best practice to configure your Hyland Printserver and Multiserver to automatically restart upon failure.

To do so, follow these steps:

1. Open your Windows Service Manager.
2. Right-click on the service you want to configure, then click Properties.
3. Select the **Recovery** tab.
4. Set the **First failure** field to **Restart the Service**.

Usage

Performing Patient Lookup

When indexing a document, it is considered a best practice to use a patient’s Account Number for patient verification instead of the Medical Record Number. When using the patient’s Medical Record Number, the patient’s account number is not applied to the document.

Overview

Note: For more information on standard Document Imaging functionality and requirements, see the Document Imaging documentation.

Note: Document Imaging can be used with OnBase for Meditech within the OnBase Client and the Unity Client; it is not available within the Web Client.

Document Imaging allows you to validate OnBase Keyword Values against the corresponding values that reside within your Meditech solution. When pre-indexing or indexing a batch, Keyword validation is automatically performed for the Meditech chart data fields that have been mapped to your OnBase Keyword Types (i.e., **Medical Record #** and/or **Chart ID #/ Account #**). Pending the validation of these values, additional values from your Meditech solution can be populated to your OnBase solution. These Keyword validation and autofill actions are accomplished through a Web service call to the Application Server, which performs the necessary interaction with your Meditech solution.

Alternatively, you can manually perform Keyword validation on an ad hoc basis when pre-indexing or indexing a batch. In the OnBase Client, you can manually validate Keywords by clicking the **Verify** button, which is configured with a VB script. In the Unity Client, you can manually validate Keywords by clicking the **Patient Verification** button in the **Meditech** ribbon group.

Licensing

To use Document Imaging with your OnBase for Meditech solution, you must have valid Document Imaging licensing. See the Document Imaging documentation for more information.

Installation

Installing the Application Server

In order to use Document Imaging with your OnBase for Meditech solution, you must have your OnBase Application Server properly installed and configured for your Document Imaging solution. For installation procedures, see the Application Server module reference guide.

Once the Application Server has been installed, the following files must be copied to the Application Server's **bin** folder (i.e., **C:\Inetpub\wwwroot\AppServer\bin**). These files can be obtained from your solution provider.

- **Hyland.Integrations.Meditech.dll**
- **Hyland.Integrations.Meditech.Network.dll**
- **Hyland.Oem.Meditech.dll**

Configuration

The following steps are necessary for configuring Document Imaging for use with Meditech:

1. Map the appropriate Meditech chart data fields to corresponding OnBase Keyword Types. See Mapping Chart Data Fields to Keyword Types on page 66 for more information.
2. For automatic Keyword validation, configure the appropriate scan queues. See Configuring a Scan Queue for Keyword Validation on page 67 for more information.
3. For manual Keyword validation in the OnBase Client, configure the **Verify** button using a VB script. See Configuring the Verify Button on page 69 for more information.

Mapping Chart Data Fields to Keyword Types

For the validation process to function, at least one of the following chart data fields must be mapped to an OnBase Keyword Type and marked as required:

- **Medical Record #**
- **Chart ID #/Account #**

If you map additional Meditech chart data fields to OnBase Keyword Types, and validation is successful, these Keyword Types will be populated with the values in the corresponding chart data fields.

OnBase for Meditech supports the following chart data fields:

- **Medical Record #**
- **Chart ID #/Account #**
- **Admit Date**
- **MPI Number/EPI Number**
- **Patient First Name**
- **Patient Middle Name**
- **Patient Last Name**
- **Patient Sex**
- **Patient DOB**

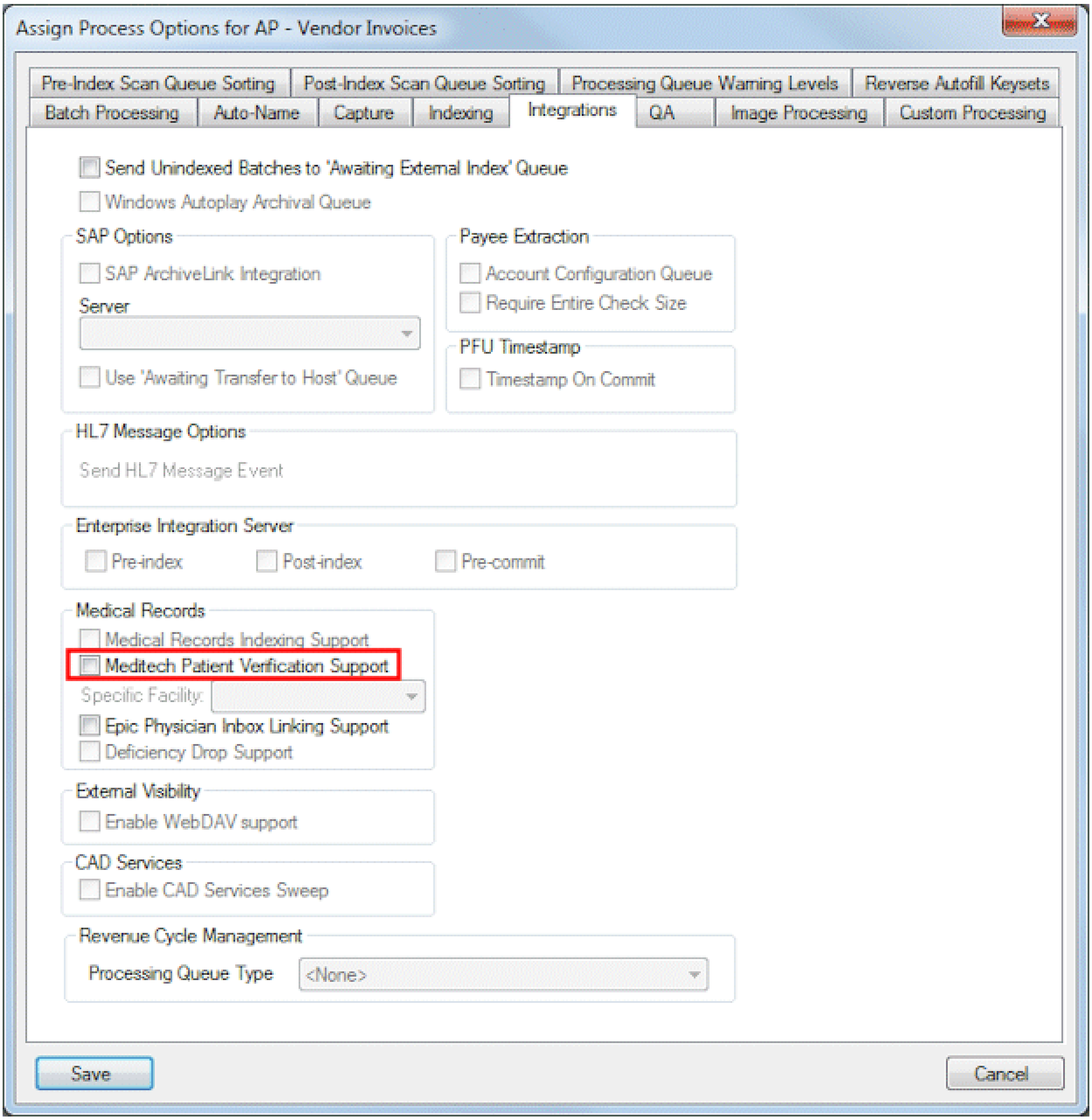
For information on configuration procedures, see the Chart Data Field Configuration section in the HL7 documentation.

Configuring a Scan Queue for Keyword Validation

Note: The following steps describe configuration for standard processing of scanned batches. If you are using custom capture processes instead of standard processing for your OnBase for Meditech solution, you must configure the appropriate options within OnBase Studio. For more information, see Studio – Capture Process Designer Configuration on page 104.

To configure a scan queue for Keyword validation, you must select the appropriate setting in the **Assign Process Options for <Scan Queue>** dialog box.

1. From the **Assign Process Options for <Scan Queue>** dialog box, click the **Integrations** tab.
2. In the Medical Records section of the **Integrations** tab, select **Meditech Patient Verification Support**.



3. From the **Specific Facility** drop-down select list, select the specific Meditech facility you wish to use for Keyword validation for the scan queue. Validation will be performed only on Keyword Values from this facility, which can be useful if your Meditech system encompasses multiple facilities that may use some of the same identifying values (e.g., **Medical Record #**, **Account #**, etc.) for different patients.
4. Click **Save**.

   The Meditech Keyword validation is now enabled for all batches added to the scan queue.

Configuring the Verify Button

In order for the **Verify** button to be displayed in the **Indexing** dialog box to enable manual Keyword validation in the OnBase Client, a proper VB script must be configured to run on the client workstation. For more information on configuring VB scripts, see the Automation API documentation.

A sample script is shown below:

```
' button:Verify
Sub Main35()
dim obapp
set obapp = CreateObject("onbase.application")
dim keypanel
set keypanel = obapp.IndexKeywordPanel
keypanel.DoVerb "Meditech Verify"
set keypanel = Nothing
set obapp = Nothing
End Sub
```

Usage

Performing Automatic Keyword Validation

When pre-indexing or indexing a batch, once you enter a value for the Keyword Type that has been configured for validation (i.e., **Medical Record #** or **Chart ID #**/**Account #**) and begin the scanning or indexing process, Keyword validation is automatically performed. If this value is successfully matched to the corresponding value in your Meditech solution, the remaining values for the matching Meditech record are populated in the corresponding Keyword Type fields. If Keyword validation fails, an error message is displayed.

Note: If a time is included in the **Admit Date** value in your Meditech solution, the time portion is removed when the value is populated in the corresponding OnBase Keyword Type field. This ensures that date-only Keyword Types (i.e., **Date** Keyword Types, as opposed to **Date & Time** Keyword Types) are populated correctly.

Note: If no value is entered for the Keyword Type that has been configured for validation, the validation process is not performed, and no error message is displayed.

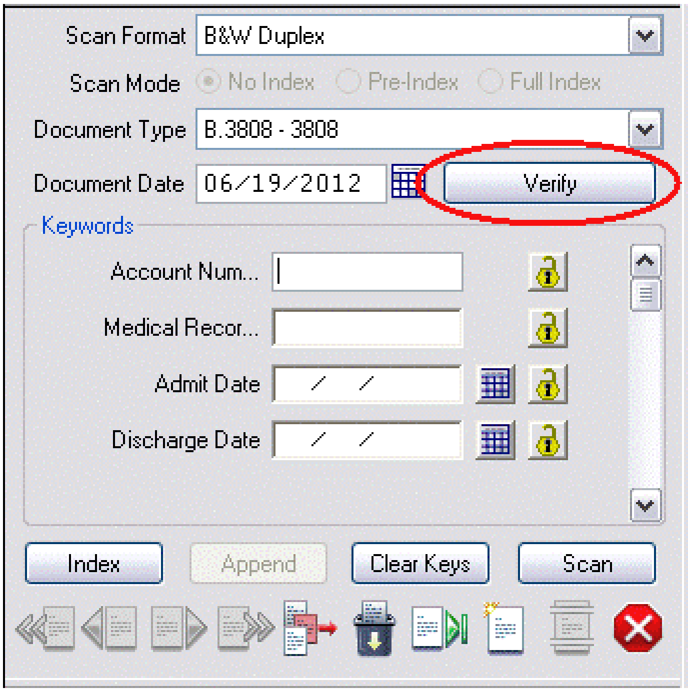
Note: For documents in the batch belonging to a Document Type that has been mapped to a Meditech form, the **Meditech Retrieval ID** is not assigned to the documents until the batch is committed.

Performing Manual Keyword Validation in the OnBase Client

If your Document Imaging solution has been configured with a proper VB script, the **Verify** button is displayed in the **Indexing** dialog box when pre-indexing or indexing a batch. You can perform manual Keyword validation by clicking the **Verify** button.

Note: You can perform manual Keyword validation even if the scan queue is not configured for it; the VB script overrides the applicable scan queue setting.

1. When pre-indexing or indexing a batch, locate the **Verify** button in the **Indexing** dialog box.



2. Enter, at a minimum, a value for the Keyword Type to which the **Medical Record #** and/or **Chart ID #/Account #** has been mapped.

3. Click **Verify**.
    - If the values for the **Medical Record #** and/or **Chart ID #/Account #** specified in the Data Set are matched to the corresponding values in your Meditech solution, the remaining values for the matching Meditech record (e.g., **Patient First/Middle/Last Name**, **Admit Date**, etc.) are populated in the **Indexing** dialog box.

Note: If a time is included in the **Admit Date** value in your Meditech solution, the time portion is removed when the value is populated in the corresponding OnBase Keyword Type field. This ensures that date-only Keyword Types (i.e., **Date** Keyword Types, as opposed to **Date & Time** Keyword Types) are populated correctly.

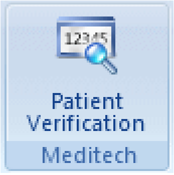
- If validation fails, an error message is displayed.

Note: For documents in the batch belonging to a Document Type that has been mapped to a Meditech form, the **Meditech Retrieval ID** is not assigned to the documents until the batch is committed.

Performing Manual Keyword Validation in the Unity Client

The **Patient Verification** button is displayed in the **Meditech** ribbon group when pre-indexing or indexing a batch. You can perform manual Keyword validation by clicking the **Patient Verification** button.

1. When pre-indexing or indexing a batch, locate the **Patient Verification** button is displayed in the **Meditech** ribbon group.



2. Enter, at a minimum, a value for the Keyword Type to which the **Medical Record #** and/or **Chart ID #/Account #** has been mapped.

3. Click the **Patient Verification** button.
    - If the values for the **Medical Record #** and/or **Chart ID #**/**Account #** specified in the Data Set are matched to the corresponding values in your Meditech solution, the remaining values for the matching Meditech record (e.g., **Patient First/Middle/Last Name**, **Admit Date**, etc.) are populated in the Keyword panel.

Note: If a time is included in the **Admit Date** value in your Meditech solution, the time portion is removed when the value is populated in the corresponding OnBase Keyword Type field. This ensures that date-only Keyword Types (i.e., **Date** Keyword Types, as opposed to **Date & Time** Keyword Types) are populated correctly.

- If validation fails, an error message is displayed.

Note: For documents in the batch belonging to a Document Type that has been mapped to a Meditech form, the **Meditech Retrieval ID** is not assigned to the documents until the batch is committed.

Overview

Note: For more information on standard Express Scanning functionality and requirements, see the Express Scanning documentation.

Express Scanning allows you to validate OnBase Keyword Values against the corresponding values that reside within your Meditech solution. When using Express Scanning to scan, scan from disk, sweep, or Print to OnBase via the Virtual Print Driver, Keyword validation is performed for the Meditech chart data fields that have been mapped to your OnBase Keywords (i.e., **Medical Record #** and/or **Chart ID #**/**Account #**). Pending the validation of these values, additional values from your Meditech solution can be populated to your OnBase solution. These Keyword validation and autofill actions are accomplished through a Web service call to the Application Server, which performs the necessary interaction with your Meditech solution.

Licensing

To use Express Scanning with your OnBase for Meditech solution, you must have an Express Scanning Workstation license.

Installation

Installing the Application Server

In order to use Express Scanning with your OnBase for Meditech solution, you must have your OnBase Application Server properly installed for your Express Scanning solution. For installation procedures, see the Application Server module reference guide.

Once the Application Server has been installed, the following files must be copied to the Application Server's **bin** folder (i.e., **C:\Inetpub\wwwroot\AppServer\bin**). These files can be obtained from your solution provider.

- **Hyland.Integrations.Meditech.dll**
- **Hyland.Integrations.Meditech.Network.dll**
- **Hyland.Oem.Meditech.dll**

Configuration

The following steps are necessary for configuring Express Scanning for use with Meditech:

1. Map the appropriate Meditech chart data fields to corresponding OnBase Keyword Types. See Mapping Chart Data Fields to Keyword Types on page 75 for more information.
2. Configure the verification button for the Express Scanning client. See Configuring the Verification Button on page 76 for more information.

Mapping Chart Data Fields to Keyword Types

For the validation process to function, at least one of the following chart data fields must be mapped to an OnBase Keyword Type and marked as required:

- **Medical Record #**
- **Chart ID #/Account #**

If you map additional Meditech chart data fields to OnBase Keyword Types, and validation is successful, these Keyword Types will be populated with the values in the corresponding chart data fields.

OnBase for Meditech supports the following chart data fields:

- **Medical Record #**
- **Chart ID #/Account #**
- **Admit Date**
- **MPI Number/EPI Number**
- **Patient First Name**
- **Patient Middle Name**
- **Patient Last Name**
- **Patient Sex**
- **Patient DOB**

For information on configuration procedures, see the Chart Data Field Configuration section in the HL7 documentation.

Configuring the Verification Button

To activate Meditech Keyword validation, you must configure a verification button in the Express Scanning master configuration file:

1. Within the Express Scanning master configuration file, locate the **BUTTON** sub-element for the button that will be used to perform Keyword validation.
2. Within the **BUTTON** sub-element, add the **meditech** setting. This setting controls whether Express Scanning calls out to an external Web service to validate the dataset Keyword Values against the values stored in the Meditech system. The external Web service is accessed via the Application Server.

   If multiple facilities are configured, within the **BUTTON** sub-element, add the **facilityid** attribute. Set the attribute value to the facility ID against which you would like to verify.
3. Set the **meditech** setting to **true** (e.g., **<BUTTON meditech="true">**).
4. Configure a **KEYWORD** sub-element for each Keyword Type to which you have mapped the corresponding Meditech chart data fields.
5. Save and close the configuration file.

Usage

When you select a Document Type button that has been configured for Keyword validation in the Express Scanning client, depending on your configuration, you may be prompted to enter a value for the OnBase Keyword Type(s) to which the **Medical Record #** and/or **Chart ID #/ Account #** chart data fields have been mapped. Once the necessary values have been entered, Keyword validation is performed. If these values are successfully matched to the corresponding values in your Meditech solution, the remaining values for the matching Meditech record are populated in the corresponding Keyword Type fields. If Keyword validation fails, an error message is displayed.

If you are not prompted to enter any Keyword Values, and if the Keyword Values for **Medical Record #** and/or **Chart ID #**/**Account #** have already been specified (i.e., in the Express Scanning master configuration file or through the **-DATA** command line switch), then Keyword validation is automatically performed.

Note: If a time is included in the **Admit Date** value in your Meditech solution, the time portion is removed when the value is populated in the corresponding OnBase Keyword Type field. This ensures that date-only Keyword Types (i.e., **Date** Keyword Types, as opposed to **Date & Time** Keyword Types) are populated correctly.

Note: If no value is entered for the Keyword Type that has been configured for validation, the validation process is not performed, and no error message is displayed.

Front Office Scanning With OnBase for Meditech

Overview

Note: For more information on standard Front Office Scanning functionality and requirements, see the **Front Office Scanning** module reference guide.

Front Office Scanning allows you to validate user-specified Data Set values against the corresponding values that reside within a specific Meditech system. Once a Data Set is selected in the Front Office Scanning client, Keyword validation is automatically performed for the Meditech chart data fields that have been mapped to your OnBase Keywords (i.e., **Medical Record #** and/or **Chart ID #**/**Account #**) based on the assigned Meditech system to be used for verification. Pending the validation of these values, additional values from your Meditech solution can be populated to your OnBase solution. These Keyword validation and autofill actions are accomplished through a Web service call to the Application Server, which performs the necessary interaction with your Meditech solution.

When creating a manual Data Set within Front Office Scanning, you must manually perform validation by clicking the **Verify** button in the Front Office Scanning client. This button is configured in the Front Office Scanning configuration file.

Licensing

To use Front Office Scanning with your OnBase for Meditech solution, you must have a Front Office Scanning license.

Installation

Installing the Application Server

In order to use Front Office Scanning with your OnBase for Meditech solution, you must have your OnBase Application Server properly installed and configured for your Front Office Scanning solution. For installation procedures, see the Application Server module reference guide.

Once the Application Server has been installed, the following files must be copied to the Application Server's **bin** folder (i.e., **C:\Inetpub\wwwroot\AppServer\bin**). These files can be obtained from your solution provider.

- **Hyland.Integrations.Meditech.dll**
- **Hyland.Integrations.Meditech.Network.dll**
- **Hyland.Oem.Meditech.dll**

Installing the NPR Report and VDSScan Applications

The Front Office Scanning integration for Meditech requires the NPR Report application and the VDSScan bridge application to be properly installed and configured for your solution. These applications work in conjunction to allow you to launch Front Office Scanning directly from your Meditech system, passing the **Medical Record #** and/or **Chart ID #/Account #** values to the Front Office Scanning client for Keyword validation.

For more information on installing and configuring the NPR Report and VDSScan applications, contact your solution provider.

Configuration

The following steps are necessary for configuring Front Office Scanning for use with Meditech:

1. Map the appropriate Meditech chart data fields to corresponding OnBase Keyword Types. See Mapping Chart Data Fields to Keyword Types on page 78 for more information.
2. If your solution includes multiple facilities or Meditech systems, configure your scan queue to validate against a specific facility. See Configuring a Specific Verification Facility on page 79 for more information.
3. For manually created Data Sets, configure the **Verify** button for the Front Office Scanning client. See Configuring the Verify Button on page 79 for more information.
4. Create a copy of the default Meditech external system. The copied system has an ID# greater than 100, which is required to release documents successfully from Front Office Scanning to Meditech. See Creating Additional External Systems on page 143 for more information.

The following step is optional for configuring Front Office Scanning for use with Meditech:

- Configure your Front Office Scanning solution to authenticate into OnBase using your Meditech user name and either your workstation's IP address or machine name. See Configuring IP-Based Authentication on page 80 for more information.

Mapping Chart Data Fields to Keyword Types

For the validation process to function, at least one of the following chart data fields must be mapped to an OnBase Keyword Type and marked as required:

- **Medical Record #**
- **Chart ID #/Account #**

If you map additional Meditech chart data fields to OnBase Keyword Types, and validation is successful, these Keyword Types will be populated with the values in the corresponding chart data fields.

OnBase for Meditech supports the following chart data fields:

- **Medical Record #**
- **Chart ID #/Account #**

- **Admit Date**
- **MPI Number/EPI Number**
- **Patient First Name**
- **Patient Middle Name**
- **Patient Last Name**
- **Patient Sex**
- **Patient DOB**

For information on configuration procedures, see the Chart Data Field Configuration section in the HL7 documentation.

Configuring a Specific Verification Facility

If your solution includes multiple facilities or Meditech systems, configuring your verification scan queue to use a specific validation facility allows for a patient to be verified against the correct Meditech system.

Note: For more information on configuring scan queues, see the **Document Imaging** module reference guide.

To configure your verification scan queue to use a specific facility for validation:

1. In the Configuration module, select **Import | Scan Queues**.
2. Select the scan queue used for patient verification, then click **Process Options**. The **Assign Process Options** dialog box is displayed.
3. Select the **Integrations** tab of the **Assign Process Options** dialog box.
4. Within the **Medical Records** section, select **Meditech Patient Verification Support**.
5. In the **Specific Facility** drop-down select list, select the facility against which you want to verify patients.

Note: If no facility is selected, the scan queue verifies against the default Meditech system.

Configuring the Verify Button

For manually created Data Sets, you must configure the **Verify** button in the Front Office Scanning configuration file.

To configure the **Verify** button:

1. Within the Front Office Scanning configuration file, add the **MeditechIntegration** element.
2. Within the **MeditechIntegration** element, add the **VerifyPatient** setting. This setting controls whether Front Office Scanning calls out to an external Web service to validate the Data Set Keyword Values against the values stored in the Meditech system. The external Web service is accessed via the Application Server.
3. Set the **VerifyPatient** setting to **true** (e.g., **<MeditechIntegration VerifyPatient="true">**).

4. If you wish to configure a specific Meditech facility against which to validate the Data Set Keyword Values, within the **MeditechIntegration** element, add the **FacilityID** setting and set it to the facility's corresponding Medical Facility # (e.g., **<MeditechIntegration VerifyPatient="true" FacilityID="102">**).

Tip: To locate the Medical Facility # for the desired facility, within OnBase Configuration, select **Medical | Facilities | Facility Configuration** to open the **Medical Facilities Configuration** dialog box. Then, select the desired facility and note the number displayed in the upper-right corner of the dialog. For more information on configuring medical facilities, see the **HL7 Module** module reference guide or help file.

Note: If you do not add the **FacilityID** setting, Front Office Scanning will validate the Data Set Keyword Values against the default Meditech facility.

5. Save and close the configuration file.

Note: The above settings require that your Front Office Scanning client is configured to have multiple input buttons (i.e., the **multiplebuttons** setting in the **ScanOptions** element is set to **true**).

Configuring IP-Based Authentication

You can configure Front Office Scanning to authenticate into OnBase using your Meditech user name and either your workstation's IP address or machine name. This type of authentication eliminates the need for users to manually authenticate multiple times (i.e., when logging on to the Meditech system, launching Front Office Scanning, viewing a document, etc.) and provides a proper audit history within OnBase for users who access the Meditech system from shared workstations or kiosks.

To configure IP-based authentication:

1. In the Front Office Scanning configuration file, locate the **CommParams** element.
2. Within the **CommParams** element, add the **WorkstationType** setting. This setting controls whether IP-based authentication is enabled.
3. Set the **WorkstationType** setting to **shared** (e.g., **WorkstationType="shared"**).
4. Save and close the configuration file.

Note: This setting requires that your Front Office Scanning client is not configured for Active Directory authentication (i.e., the **ntsecurity** setting in the **CommParams** element is set to **false**).

Note: The IP address or machine name to be used for authentication must be added to your Meditech system.

Usage

Performing Automatic Keyword Validation

When you select a Data Set in the Front Office Scanning client, Keyword validation is automatically performed for the Meditech **Medical Record #** and/or **Chart ID #**/**Account #** data fields, which have been mapped to corresponding OnBase Keyword Types. If the values for either of these fields are matched to the corresponding values in a Meditech system, the remaining values for the matching Meditech record (e.g,. **Patient First/Middle/Last Name**, **Admit Date**, etc.) are populated in the Data Set, overwriting any existing values, and the **Related Documents** list is automatically populated.

Note: If zeros are present in the **Medical Record #** and/or **Chart ID #**/**Account #** data fields in your Meditech solution, and these zeros are omitted from the corresponding values in the selected Data Set, then these zeros are populated in the appropriate values when validation is successful. This ensures that the values stored in OnBase precisely match the corresponding data fields in your Meditech solution.

Note: If a time is included in the **Admit Date** value in your Meditech solution, the time portion is removed when the value is populated in the corresponding OnBase Keyword Type field. This ensures that date-only Keyword Types (i.e., **Date** Keyword Types, as opposed to **Date & Time** Keyword Types) are populated correctly.

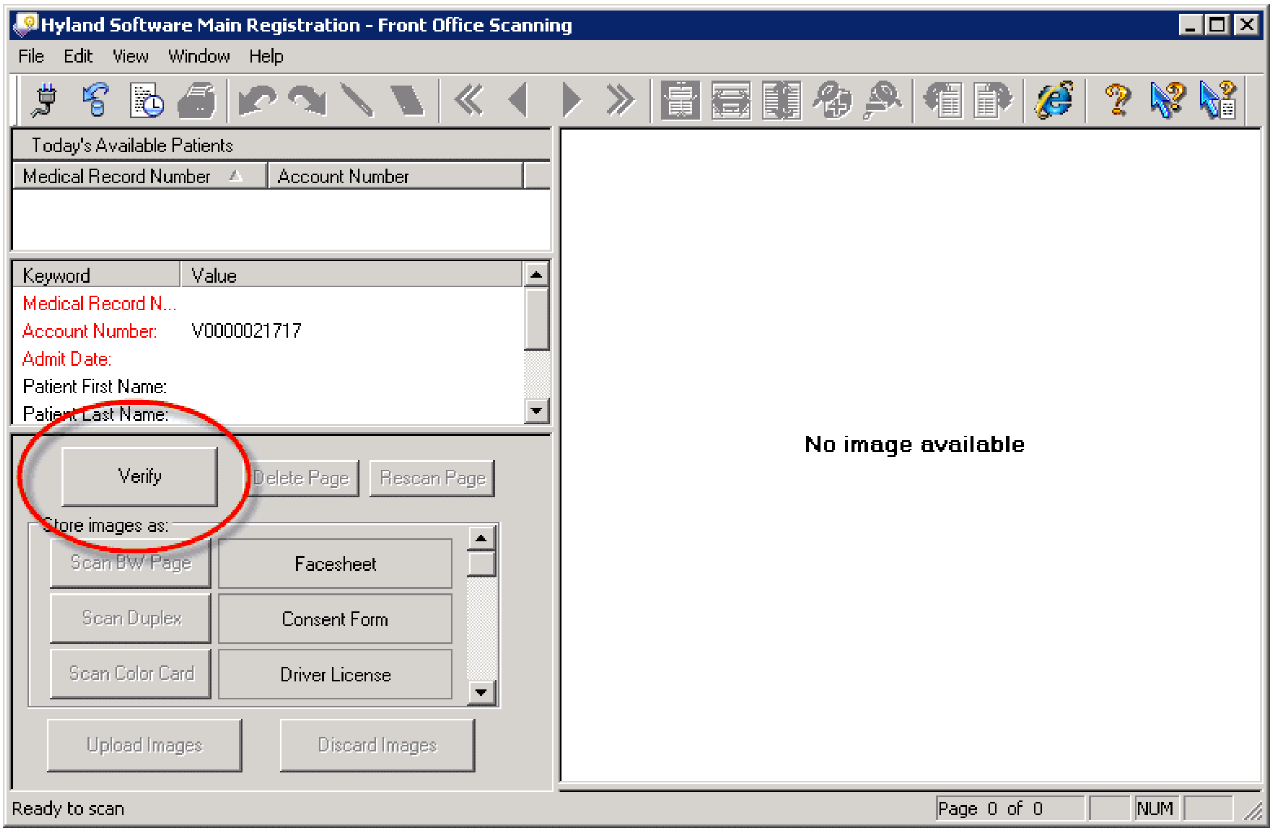
Note: In the **Selected Data Sets** window, the Keyword Values are listed in the order in which they appear in the Front Office Scanning configuration file (i.e., in the order in which they appear in the **Data Set** element, followed by the order in which they appear in the **Keywords** element).

Performing Manual Keyword Validation

When you manually create a Data Set in the Front Office Scanning client, you must perform Keyword validation manually by clicking the **Verify** button.

1. In the Front Office Scanning client, manually create a Data Set. At a minimum, enter a Keyword Value for the **Medical Record #** and/or the **Chart ID #**/**Account #**.

   The **Verify** button is enabled.

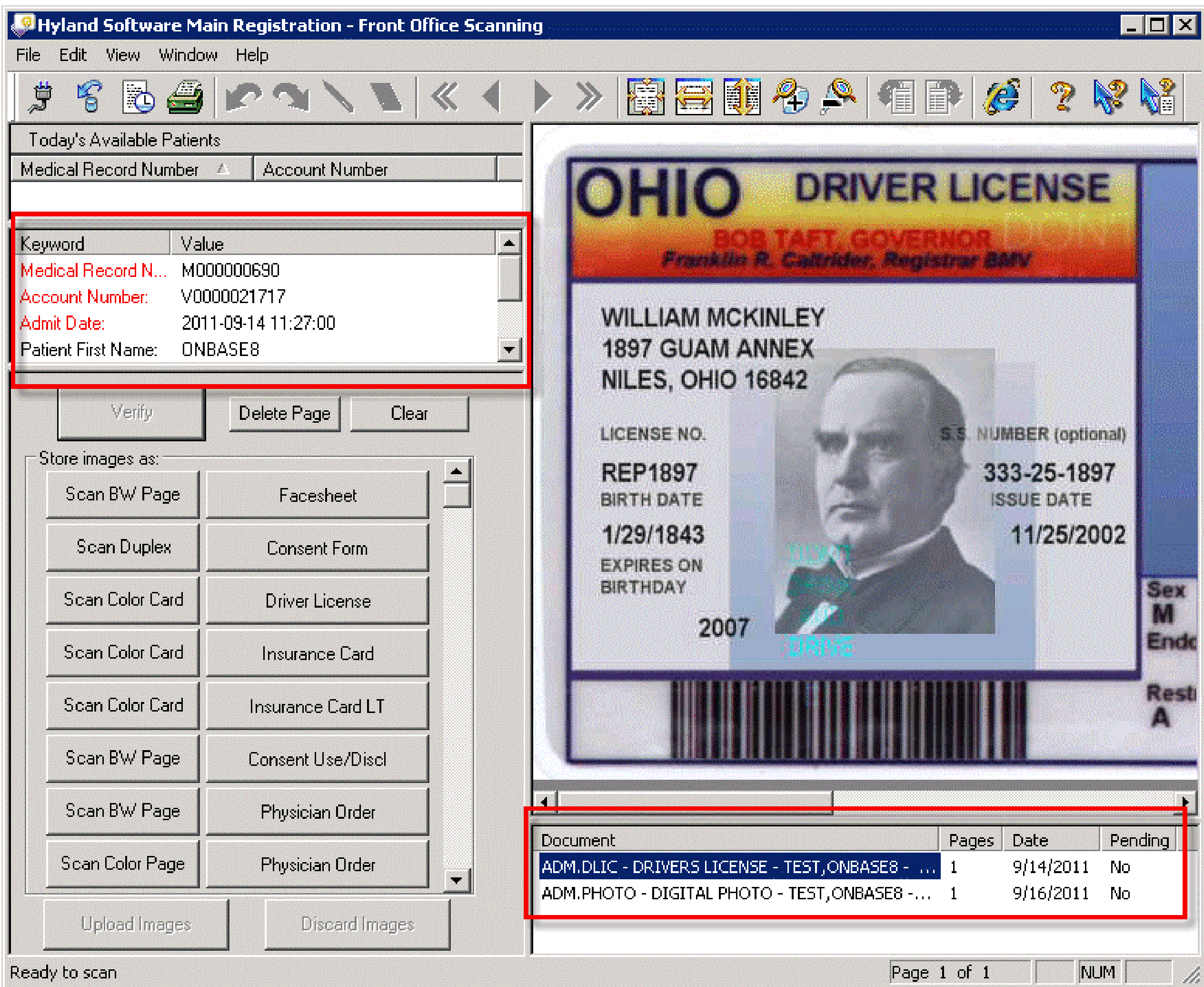


2. Click **Verify** to test the values specified in the Data Set against the corresponding values in your Meditech solution.
   - If the values for the **Medical Record #** and/or **Chart ID #**/**Account #** specified in the Data Set are matched to the corresponding values in your Meditech solution, the remaining values for the matching Meditech record (e.g,. **Patient First/Middle/Last Name**, **Admit Date**, etc.) are populated in the Data Set, overwriting any existing values, and the **Related Documents** list is automatically populated.

Note: If zeros are present in the **Medical Record #** and/or **Chart ID #**/**Account #** data fields in your Meditech solution, and these zeros are omitted from the corresponding values in the selected Data Set, then these zeros are populated in the appropriate values when validation is successful. This ensures that the values stored in OnBase precisely match the corresponding data fields in your Meditech solution.

Note: If a time is included in the **Admit Date** value in your Meditech solution, the time portion is removed when the value is populated in the corresponding OnBase Keyword Type field. This ensures that date-only Keyword Types (i.e., **Date** Keyword Types, as opposed to **Date & Time** Keyword Types) are populated correctly.

Note: In the **Selected Data Sets** window, the Keyword Values are listed in the order in which they appear in the Front Office Scanning configuration file (i.e., in the order in which they appear in the **Data Set** element, followed by the order in which they appear in the **Keywords** element).



- If validation fails, an error message is displayed.

Medical Records Management With OnBase for Meditech

Overview

Medical Records Management allows physicians to access health information for multiple users simultaneously.

Note: For detailed information on standard MRM functionality and requirements, see the MRM documentation.

Licensing

To use Medical Records Management with your OnBase for Meditech solution, you must have a Medical Records Completion for OnBase Meditech license.

MRM Usage

Standard Medical Records Management functionality is available when using Medical Records Management in conjunction with OnBase for Meditech. For detailed information on using Medical Records Management, see the **Medical Records Unity Client** or **DeficiencyPop** module reference guide.

OnBase Patient Window

OnBase Patient Window allows Meditech users to view all of a patient's medical record documents residing in OnBase. Users can find the documents they need by applying one or more filters, and they can save specific filter sets for use with other records. OnBase Patient Window also allows users to submit documents to OnBase Workflow for correction.

OnBase Patient Window can authenticate users based on their Meditech user names and the IP address of the client workstation. To configure OnBase Patient Window to use this authentication method, include the following parameter in the URL query string:

```
&meditechAuth=true
```

The following is an example of a Patient Window URL generated for the Meditech integration:

`https://server/PatientWindow/Login.aspx?mrn=101`**&meditechAuth=true**

For more information about configuring URLs for OnBase Patient Window, see the **Patient Window** module reference guide.

DeficiencyPop

Physicians working in Meditech can use DeficiencyPop to access and complete their OnBase deficiencies. Depending on their preference, physicians can view all their OnBase deficiencies in a single list, or they can browse deficiencies on a chart-by-chart basis.

DeficiencyPop can authenticate users based on their Meditech user names and the IP address of the client workstation. To configure DeficiencyPop to use this authentication method, include the following parameter in the URL query string:

```
&meditechAuth=true
```

The following is an example of a DeficiencyPop URL generated for the Meditech integration:

`https://server/DeficiencyPop/Login.aspx?`**meditechAuth=true**

For more information about configuring URLs for DeficiencyPop, see the **DeficiencyPop** module reference guide.

Deficiency Polling Service

The deficiency polling service is a Medical Records Management component that synchronizes external deficiency information between OnBase and Meditech.

External deficiencies are deficiencies that are addressed within Meditech and tracked within OnBase. After the deficiencies are completed in Meditech, the deficiency polling service marks them as completed in OnBase. External deficiencies are automatically confirmed and bypass the OnBase Reanalysis process.

To configure the polling service, see the following topics:

- Configuring External Systems for Deficiency Polling on page 86
- Configuring Facilities for Deficiency Polling on page 87
- Enabling External Deficiencies on page 88
- Configuring External Deficiencies on page 89
- Configuring the Polling File Integration on page 94
- Running the Polling Service on page 98
- Troubleshooting the Polling Service on page 100

Configuring External Systems for Deficiency Polling

To use the deficiency polling service, you must create and configure each Meditech system that will use the service under **Utils | External Systems**. The default external systems for Meditech are not eligible to be used with the deficiency polling service.

See Creating Additional External Systems on page 143.

Configuring Facilities for Deficiency Polling

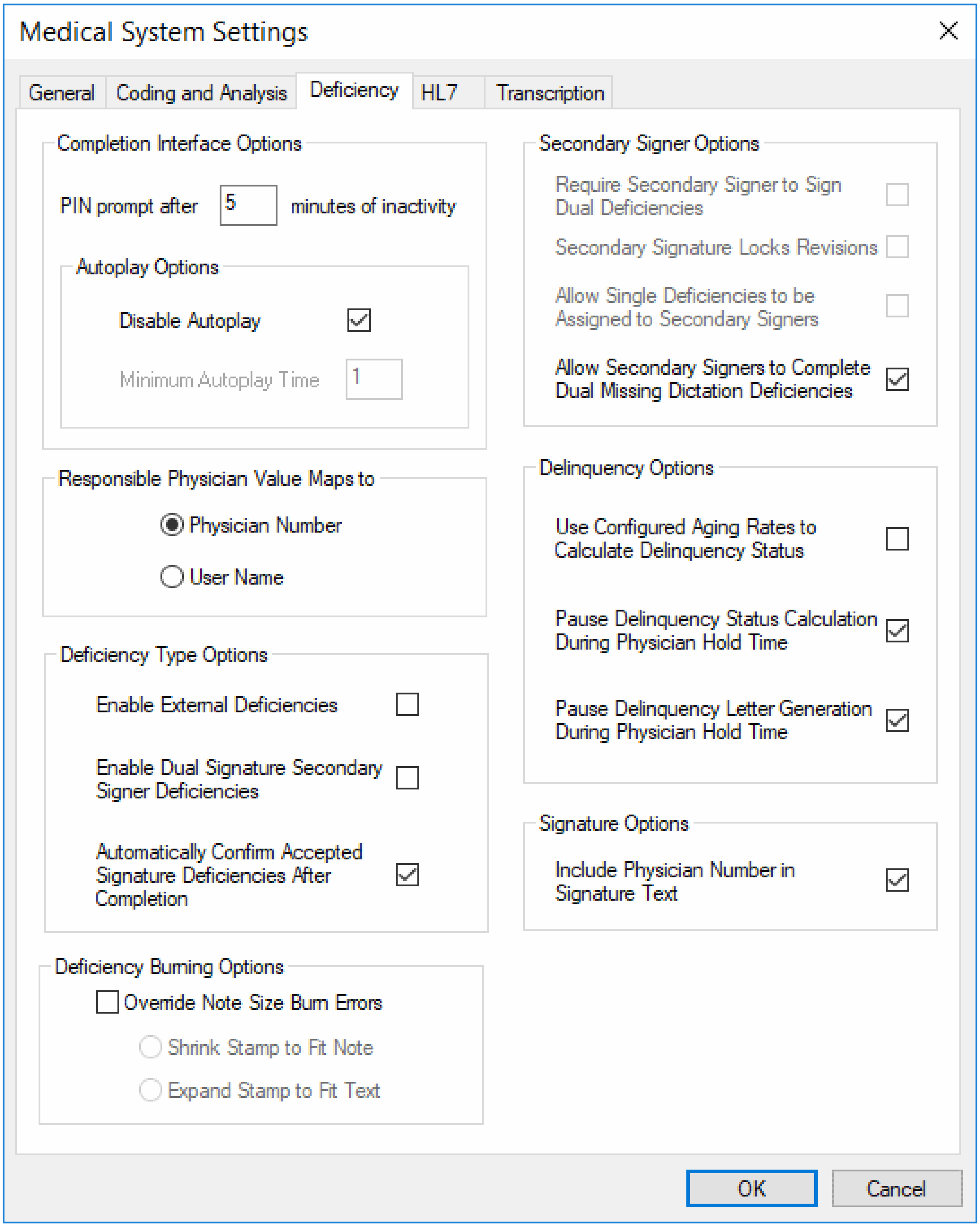
You must configure the **Release/Deficiency Polling** external system setting for each facility in your OnBase system. This setting must specify one of the external Meditech systems you configured in the previous procedure.

See Configuring Facilities for Meditech Systems on page 151.

Enabling External Deficiencies

To use deficiency polling, you must enable external deficiencies within OnBase.

1. In OnBase Configuration, select **Medical | Medical System Settings**.
2. Click the **Deficiency Settings** tab.



3. Under **Deficiency Type Options**, select **Enable External Deficiencies**.

4. Click **OK**. Continue to Configuring External Deficiencies on page 89.

Configuring External Deficiencies

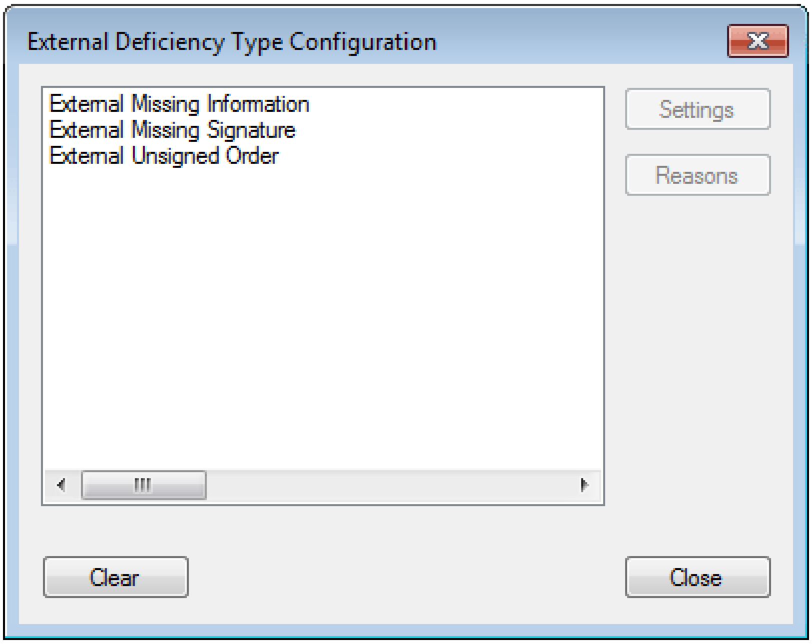
OnBase can track the following types of Meditech deficiencies:

- External Missing Signature
- External Unsigned Order

Both types of deficiencies are created and completed within Meditech. They cannot be deleted, accepted or rejected within the Medical Records Unity Client or DeficiencyPop.

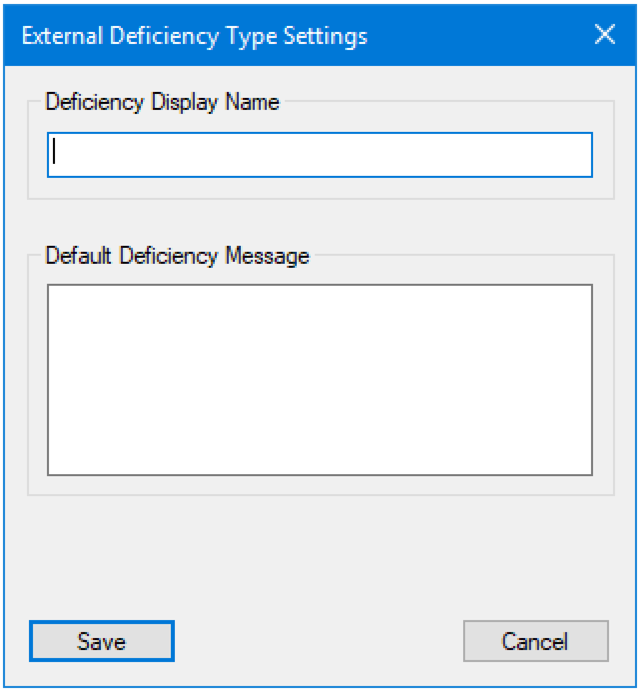
In OnBase Configuration, configure the display name and default text for these Deficiency Types so that users know to address them in Meditech.

1. Select **Medical | Deficiency Configuration | External Deficiency Types**. The **External Deficiency Type Configuration** dialog box is displayed.



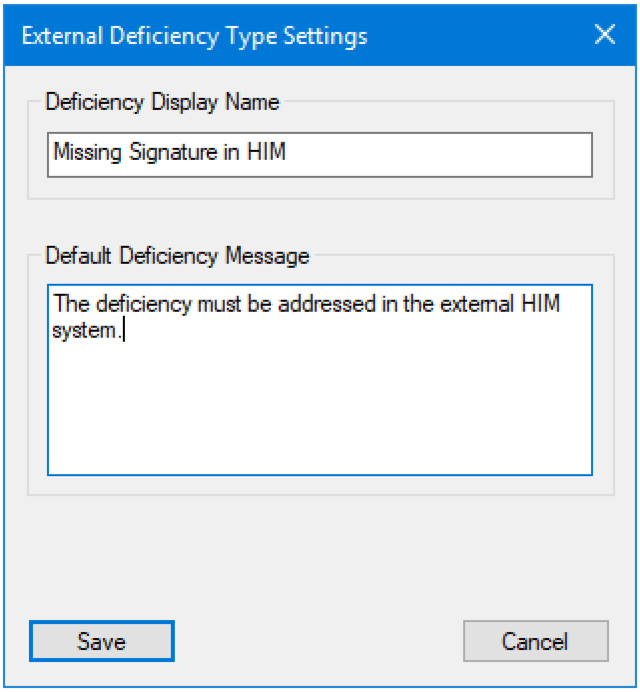
Note: The **External Deficiency Types** option is available only if external deficiencies are enabled. If you cannot select **External Deficiency Types**, see Enabling External Deficiencies on page 88.

2. Select a Deficiency Type and click **Settings**. The **External Deficiency Type Settings** dialog box is displayed.



3. In the **Deficiency Display Name** field, type the name that should be displayed for the Deficiency Type. When a user views this type of deficiency in OnBase, it will display the name configured here.

4. In the **Default Deficiency Message** field, type the default message that will be displayed in the **Deficiency Text** field when the deficiency is viewed from a chart in OnBase.



Note: The **Sync Deficiency with External System** option does not apply to the Meditech integration.

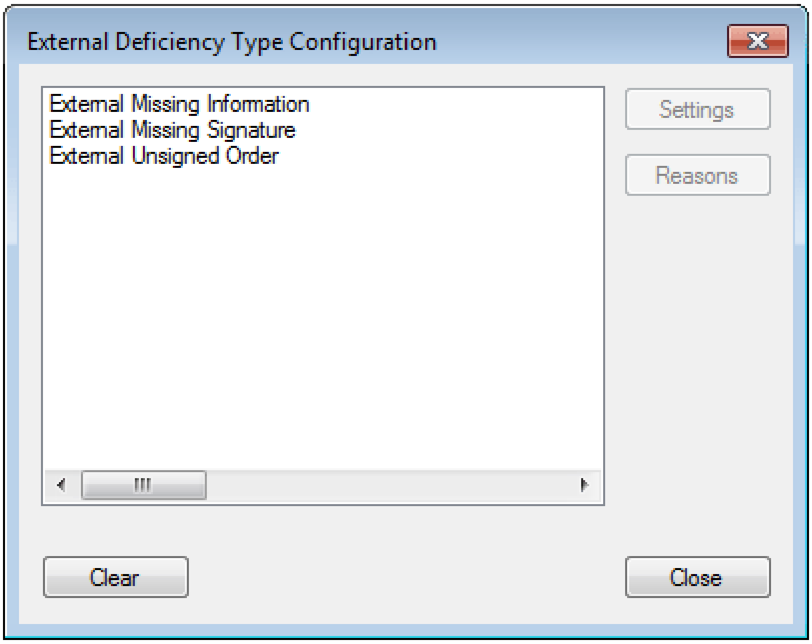
5. Click **Save**.
6. Repeat for each external Deficiency Type.

Mapping Reason Mnemonics for Polling Files

For the polling service to identify the Deficiency Types present in the polling file, you must map each external Deficiency Type to the appropriate Meditech reason mnemonic.

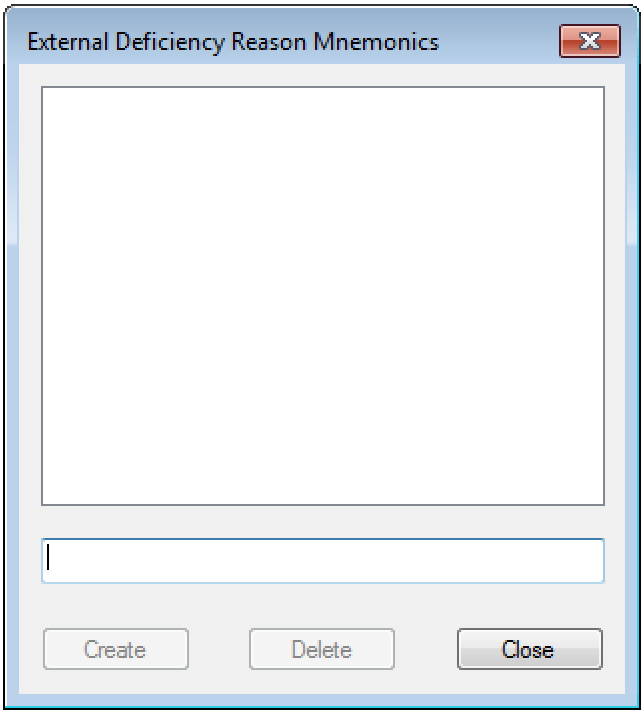
Note: External Missing Information deficiencies are not created or synchronized by the polling service. The polling service does not require this Deficiency Type to be configured.

1. In OnBase Configuration, select **Medical | Deficiency Configuration | External Deficiency Types**. The **External Deficiency Type Configuration** dialog box is displayed.



2. Select **External Missing Signature**.

3. Click **Reasons**. The **External Deficiency Reason Mnemonics** dialog box is displayed.



4. In the field provided, type the code or ID that will be provided for external missing signatures in the polling file.

Note: These codes (reason mnemonics) must be unique. The same code cannot be used for multiple external Deficiency Types.

5. Click **Create**.
6. Click **Close**.
7. Repeat for the **External Unsigned Order** Deficiency Type.
8. Close **External Deficiency Type Configuration** when you are finished.

Configuring Delinquency for External Deficiencies

In OnBase, external deficiencies can trigger delinquency for their assigned physicians. By default, delinquency is calculated based on the discharge date for the chart associated with the deficiency. If OnBase is configured with the **Use Configured Aging Rates to Calculate Delinquency Status** medical system setting enabled, then individual deficiencies can trigger delinquency based on other dates, such as their creation date.

When the deficiency polling service adds an external deficiency to OnBase, it stores the deficiency creation date (provided in the polling file) as the date the deficiency was assigned. If this date should be the basis for determining whether a physician is delinquent, then you should configure external Deficiency Types to use the **Assign Date** as the basis for aging.

For information about configuring aging rates for delinquency, see the **Medical Records Unity Client** or **DeficiencyPop** module reference guide.

Configuring the Polling File Integration

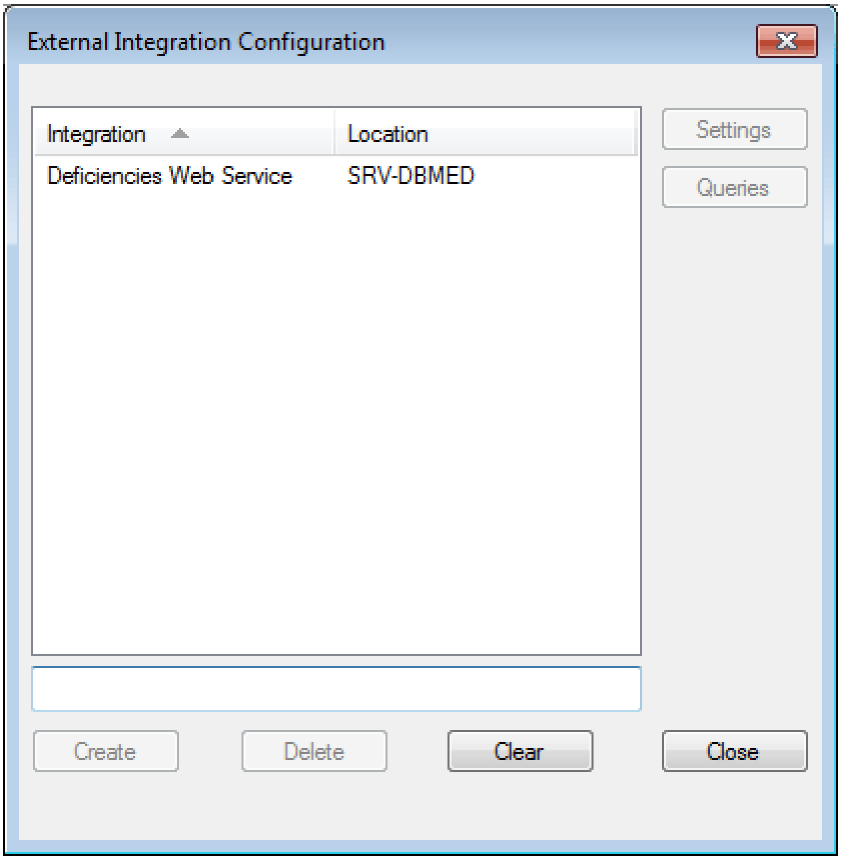
The deficiency polling service uses a polling file to synchronize external deficiency information between OnBase and Meditech. The following steps describe how to configure an external integration, which allows the deficiency polling service to locate the polling file and identify its source system.

The deficiency polling service can work with multiple Meditech systems. If you have multiple systems, configure a separate integration for each one.

Note: The Meditech integration includes additional Meditech-side software, which must be installed for the polling file to be generated.

To configure the polling file integration:

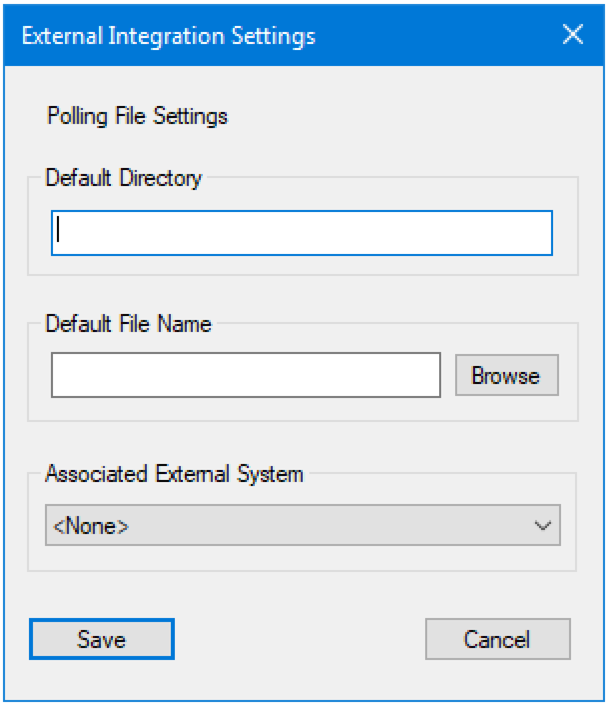
1. From OnBase Configuration, select **Medical | External System | Integrations**. The **External Integration Configuration** dialog box is displayed.



Note: The **External System | Integrations** option is unavailable if your system is not configured for external deficiencies. If you cannot select this option, see Enabling External Deficiencies on page 88.

2. Type a name for the polling service used to synchronize deficiency information.

3. Click **Create**. The **External Integration Settings** dialog box is displayed.



4. Enter the following information, or click the **Browse** button to browse to the polling file.

Setting	Description
Default Directory	Type the UNC path where the polling file will reside. For example: **\\Server\DeficiencyPolling**
Default File Name	Type the name of the file containing deficiency information generated from Meditech. For example: **PollingFile.txt**
Associated External System	Select the Meditech system this polling integration should use. The default external systems are not available. To create a new external system, see Creating Additional External Systems on page 143. Ensure the selected external system is assigned to the OnBase facilities containing the associated charts. See Configuring Facilities for Meditech Systems on page 151.

5. Ensure the file containing deficiency information is placed in the specified directory.
6. Click **Save**.

Polling File Contents

The Meditech Polling file is a text file that contains details of all external deficiencies. To avoid processing errors, make sure the following requirements are met:

- The Deficiency Types in the polling file must match the codes (reason mnemonics) configured for the external Deficiency Types in OnBase. See Mapping Reason Mnemonics for Polling Files on page 92.
- The provider information must match either the **Physician Number** or the **EMR System ID** of a Physician in OnBase. Physicians must not be set up as secondary signers.
- The encounter or account number must match an existing OnBase chart.

If processing fails for one of these reasons, the reason is recorded in a verification report in the **SYS Verification Reports** Document Type.

The following is an example of a polling file entry:

```
"M","M1007","MEDITECH1","1","2","MEDUSO","DR99X5","20110919","1002","EXTERNALDEFIC
IENCY","OE ORDERS POM - 20110429-0013"
```

Not all of the information in the file is used for deficiency synchronization. For information about each component in this file, see the following table:

Field Seq #	Description	Data Type/Length[a]
1	Prefix—Used to determine the Meditech system facility where patient belongs. OnBase does not use this field.	Char(2)
2	MRI.urn—The patient's unique reference number in the Meditech medical records system. OnBase does not use this field.	Char(25)
3	The patient's Account or Visit or Encounter number—This is the visit identifier (chart number) used in OnBase.	Char(12)
4-5	Position within the Meditech incomplete record where the physician and deficiency reside. OnBase does not use these fields.	Int, Int
6	Reason Mnemonic—In Meditech, a "reason" is equivalent to a Deficiency Type. This is the reason mnemonic set up in OnBase.	Char(10)
7	The physician mnemonic is the unique identifier of a physician in the Meditech system. This is the physician number in OnBase.	Char(10)
8	Deficiency creation date—This is the date that will be added to the deficiency in OnBase.	Char(8)

Field Seq #	Description	Data Type/Length[a]
9	Deficiency creation time—This is the time that will be added to the deficiency in OnBase.	Char(4)
10	Patient's Medical Record Number—This is the patient identifier/account (MRN) used in OnBase.	Char(10)
11	External Document Type—This is the document type that will be displayed within the Medical Records Web and Unity Client. This is not a document type within OnBase.	Char

a. The character limits and data types noted are those within Meditech. This information may be stored differently within OnBase.

Authentication Considerations

The polling file directory can be located anywhere, but the account running the polling service must have **Write** access to the directory where it is located.

If the polling file directory is on a different machine from the polling service, make sure of the following:

- A network (UNC) path is used in the External Integration Settings.
- The machine containing the polling file directory is configured to allow connections and write actions from the polling service machine.

Running the Polling Service

OnBase uses the deficiency polling service to synchronize deficiency information from Meditech with OnBase. To activate the service, apply the following command line switch to the OnBase Client executable:

-MRMSPOLL="#"

Here, # represents how often (in minutes) the service checks for the polling file. The smallest interval allowed is 1, or one minute. If # is blank, the interval defaults to 15 minutes.

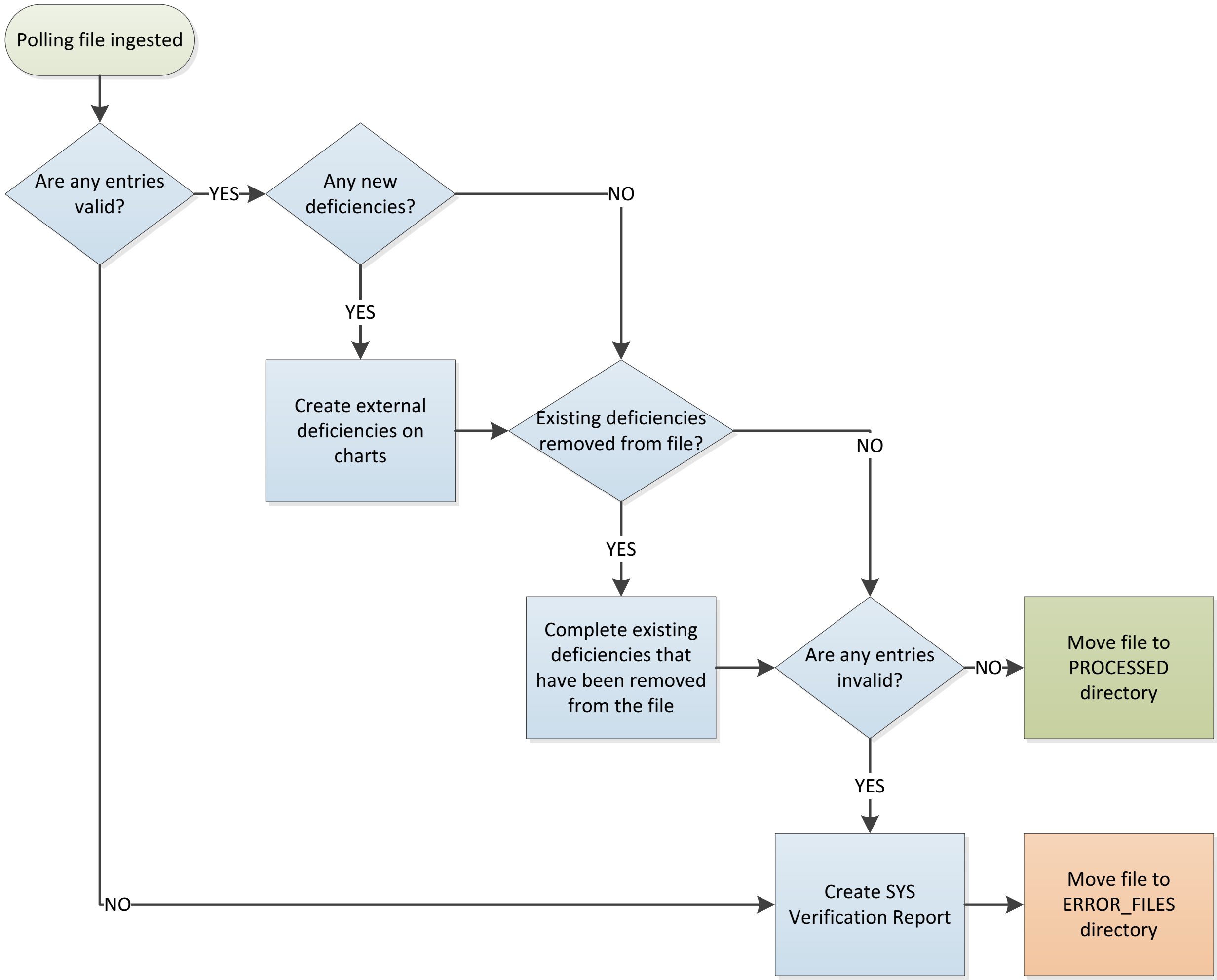
What the Polling Service Does

If OnBase is configured to synchronize deficiency information using a polling file generated from Meditech, then the polling service does the following. For a visual representation, see the flowchart following these steps.

1. Synchronizes deficiency information in OnBase.
    - When the service encounters a new deficiency, the external deficiency is created in OnBase.
    - When the service encounters an existing deficiency, it updates the external deficiency in OnBase using the information in the file.

- When an existing deficiency no longer occurs in the file, the service completes the external deficiency.

2. Creates the following subdirectories within the directory where the polling file resides:
   - **ERROR_FILES**
   - **PROCESSED**
3. Moves the polling file to the appropriate subdirectory.
   - Files that are processed successfully are moved to the **PROCESSED** directory. These files are renamed to include the date and time when they were processed.
   - Files that cannot be processed successfully are moved to the **ERROR_FILES** directory. If multiple files are moved to this directory, then a number is appended to each subsequent file's name to indicate the order in which the file was encountered.



Troubleshooting the Polling Service

The following topics describe how to resolve potential polling service issues.

External integration or query is not configured properly

When the polling service runs, the Medical Records Server info window displays the following message:

- External integration or query is not configured properly.

This message indicates the External Integration either has not been configured or is missing configuration items.

To address this issue, check **Medical** | **External Systems** | **Integrations** in OnBase Configuration. Make sure the Polling File integration is set up correctly.

Unable to access polling file

When the polling service runs, the Medical Records Server info window displays the following message:

- Unable to access polling file

This message indicates the configured polling file location does not contain the file specified in OnBase Configuration.

To address this issue, check the polling file location to make sure there is a file and it matches the file name configured in OnBase.

Failed to Acquire Lock

When the polling service runs, the Medical Records Server info window displays the following message:

- Failed to Acquire Lock

This message indicates another process has a lock that has not been released. For example, this issue may occur because the MRMS Analysis Server or Closure Server has acquired a lock but has not released it.

To address this issue, do one of the following:

- Wait until the lock is released.
- Stop the services or clients that are running other processes that acquire locks.

An initialization error has occurred

When the polling service generates a verification report (SYS Verification Report), the report displays the following message:

- An initialization error has occurred. Please verify the following file path can be created/accessed (<FILEPATH>)

This issue may occur when the account running the polling service does not have **Write** security permissions to the polling file directory.

To address this issue, do the following:

- Check the sharing and security permissions on the polling file directory. Make sure the account running the service has write permissions.
- If the polling file directory and polling service are on different machines, make sure the machine containing the polling file directory is configured to allow both connections and write actions from the polling service machine.

Fields are not separated correctly

When the polling service generates a verification report (SYS Verification Report), the report displays the following message:

- Row: 1 - Fields are not separated correctly or the wrong number of fields were found while parsing the file.

This message indicates the polling file is corrupt.

To address this issue, make sure the polling file has the correct number of fields in the correct order and with the correct separators and delimiters.

This issue should occur only when the service is tested using manually created polling files. If the corrupt file was generated by Meditech, then Meditech's method for creating the file needs to be addressed.

Physician (XYZ) is not properly configured

When the polling service generates a verification report (SYS Verification Report), the report displays the following message:

- Physician (XYZ) is not properly configured

This message indicates the specified physician ID is not a valid physician ID within OnBase.

To address this issue, do one of the following:

- Configure a physician with the specified physician ID in OnBase.
- Verify the physician ID in Meditech is correct.

Account# (ABC) does not exist

When the polling service generates a verification report (SYS Verification Report), the report displays the following message:

- Account# (ABC) does not exist.

This message indicates the specified chart is not a valid chart within OnBase.

To address this issue, do one of the following:

- Add the specified chart to OnBase.
- Verify the chart ID within Meditech is correct.

External deficiency reason mnemonic does not have a matching deficiency type

When the polling service generates a verification report (SYS Verification Report), the report displays the following message:

- External deficiency reason mnemonic (123) does not have a matching deficiency type

This message indicates the specified reason mnemonic is not configured within OnBase.

To address this issue, do one of the following:

- Assign the reason mnemonic to an external deficiency type in OnBase Configuration.
- Verify the mnemonic within Meditech is correct.

Invalid date format

When the polling service generates a verification report (SYS Verification Report), the report displays the following message:

- Row: X Field: Y - invalid date format (<BAD DATE>).

This message indicates the date in the polling file is not in the correct format.

To address this issue, make sure the date in row X field Y is in the format YYYYMMDD.

Unable to add deficiencies: Account# (XXX) is closed

When the polling service generates a verification report (SYS Verification Report), the report displays the following message:

- Unable to add deficiencies: Account# (XXX) is closed.

This message indicates the specified chart exists in OnBase, but the chart has been closed. The polling service cannot add deficiencies to the chart.

If you think this message was recorded in error, check to make sure the chart number specified in the polling file is correct.

Physician (XXX) is a Secondary Signer

When the polling service generates a verification report (SYS Verification Report), the report displays the following message:

- Physician (XXX) is a Secondary Signer. External deficiencies can only be assigned to Primary Signers.

This message indicates the physician assigned to the deficiency is configured as a secondary signer within OnBase.

To address this issue, do one of the following:

- Make sure the physician is configured correctly within OnBase.
- Make sure the correct physician is assigned within Meditech.

Deficiency Notifier

The Deficiency Notifier is a desktop application that allows physicians to remain aware of the number of deficiencies they have pending completion within both Meditech and OnBase Medical Records Management. By double-clicking the notifier, physicians can quickly access their OnBase deficiencies using DeficiencyPop.

For information about installing and configuring the Deficiency Notifier, see the **DeficiencyPop** module reference guide.

Configured in OnBase Studio, the Capture Process Designer allows administrators to customize the way scanned batches are routed and processed through the batch status queues within Document Imaging for the Unity Client.

While full user interaction on batches in the custom scan queues configured in the Capture Process Designer is only available in the Unity Client, these custom scan queues are also displayed in the OnBase Client, where sweep, scan from disk, and commit processes can be scheduled.

For more information on the Capture Process Designer's requirements and configuration options, see the **Document Imaging** module reference guide.

Configuring Custom Capture Processes

You can use the tools available in OnBase Studio to design your own custom capture processes to handle the processing and routing of scanned batches that involve OnBase for Meditech.

Note: The sections below describe only the configuration options specific to OnBase for Meditech. To create a complete custom capture process, additional configuration is required. See the **Document Imaging** module reference guide for more information.

Status Step General Settings

When configuring a status step, the **General** tab lists all of the options that apply to the custom capture process's associated scan queue. These options map to the standard scan queue configuration options set within the OnBase Configuration module.

Index

The settings described in the sections below apply to status steps associated with the **Index** batch document action.

Index

Integrations

Depending on additional solutions you may be licensed for, different options will display in the **Integrations** section. Consult the module reference guides or help files for those solutions for more information.

Option: Meditech Patient Verification Support

Select this option to validate the OnBase Keyword Values of the documents within the document set against the corresponding values that reside within your Meditech solution.

OnBase Foundation EP5

OnBase for Meditech with ODA

Administration Guide

Foundation EP5

Configuring Meditech To Integrate with OnBase

If your Meditech Magic or Client/Server with ODA solution has already been configured to integrate with another content management application, such as Valco Data Systems' MARS, then no additional configuration is required.

If your Meditech Magic or Client/Server with ODA solution has not yet been configured to integrate with a third party content management application, then you must contact your Meditech solution provider for information on how to enable Meditech to exchange data with OnBase.

Configuring OnBase To Integrate with Meditech

Prior to configuring your OnBase for Meditech solution, you must ensure that the following basic OnBase components have been created and configured.

- **The OnBase Application Server.** See The OnBase Application Server on page 107.
- **Disk Groups**. See OnBase Disk Groups on page 107.
- **Keyword Types**. See Keyword Types on page 108.
- **Document Types**. See Document Types on page 109.
- **User Groups**. See OnBase User Groups on page 110.

The OnBase Application Server

Your Application Server must be installed and configured to connect to your OnBase database. For more information on configuring your Application Server, see the Application Server documentation.

In addition, you must contact your first line of support and request the following files:

- Hyland.Integrations.Meditech.dll
- Hyland.Integrations.Meditech.Network.dll
- Hyland.Oem.Meditech.dll

After receiving these files from your first line of support, you need to copy them into your **AppServer\bin** folder.

OnBase Disk Groups

Once created and configured as part of your OnBase solution, your Disk Groups do not require any additional configuration to be used as part of your OnBase for Meditech solution.

For more information on creating and configuring Disk Groups, see the Platter Management documentation.

Keyword Types

The following OnBase Keyword Types are required and must be configured for your OnBase solution:

Keyword Type Name	Description	Configuration
Medical Record Number	The unique identification number assigned to the patient. In Meditech, this value may also be referred to as the **Unit Number**. The first three characters may be alphanumeric (although generally only the first character is non-numeric) and the remaining five characters must be numerals. All Meditech solutions use a fixed length of 8-12 characters to identify Medical Record Numbers, although some facilities allow users to eliminate leading zeros when entering a Medical Record Number value (e.g., **HS915** instead of using the full **HS00000915**). In cases like this, the Medical Record Number Keyword Type in OnBase must be configured to be long enough to accommodate a value that includes all leading zeros. If you want to allow your users to enter a Medical Record Number without entering the leading zeroes, select the **Enable Keyword Zero Padding** option when configuring this Keyword Type.	**Data Type**: Alphanumeric **Length**: Varies. Typically, this is set between 8-12 characters long.
Account Number	The unique identification number assigned to a specific patient encounter. The first three characters may be alphanumeric (although generally only the first two characters are non-numeric) and the remaining characters must be numerals. All Meditech solutions use a fixed length to identify Account Numbers, although some facilities allow users to eliminate leading zeros when entering an Account Number value (e.g., **HY5492** instead of using the full **HY0000005492**). In cases like this, the Account Number Keyword Type in OnBase must be configured to be long enough to accommodate a value that includes all leading zeros. If you want to allow your users to enter an Account Number without entering the leading zeroes, select the **Enable Keyword Zero Padding** option when configuring this Keyword Type.	**Data Type**: Alphanumeric **Length**: Varies. Typically, this is set to 12 characters long.
Document Date	The date of the patient encounter.	**Data Type**: Generally Date, although Date/Time can also be used.

Keyword Type Name	Description	Configuration
Meditech Retrieval ID	The unique Meditech identification number that is assigned to each document. The first two digits of this Keyword Value are referred to as the retrieval prefix. The retrieval prefix is used to indicate whether the document is associated with the test system or the production system. Typically, documents stored in OnBase are given a retrieval prefix of **59** for in the test environment and **58** in the production environment. If a Meditech external system is added in addition to the default **Meditech Magic**, **Meditech Client/Server**, or **Meditech M-AT** systems, the external system ID of the new Meditech system is added to the Keyword value as a prefix. The external system ID precedes the retrieval prefix. This prefix allows the Meditech Viewer and Multiserver to retrieve documents for the Meditech system they are configured to serve. **Caution:** If this value is ever deleted or changed (for example, when a user re-indexes a document), users will be unable to retrieve related documents from OnBase.	**Data Type**: Alphanumeric **Length**: 250

Depending on your business processes, other Keyword Types may be created and configured. See the System Administration documentation for more information on creating and configuring Keyword Types.

If your solution includes multiple Meditech facilities, it is highly recommended that you also configure the following Keyword Type:

Keyword Type Name	Description	Configuration
Facility Name	The name of the facility in which the patient encounter took place.	**Data Type**: Alphanumeric **Length**: Varies, depending on configured medical facility names.

Document Types

You must create and configure OnBase Document Types in order to classify and organize the documents that you will be archiving in OnBase.

The number of Document Types that you create and configure is dependent on your healthcare organization's business processes. As a general rule, OnBase Document Types and Meditech forms have a 1:1 relationship (each OnBase Document Type corresponds to one Meditech form); however, your business processes may require that OnBase Document Types have a one-to-many relationship. For example: each department within a hospital uses a unique consent form but all consent forms, regardless of department, are archived in the same OnBase Document Type.

Document Type Naming Conventions

OnBase Document Types should be named using the following naming convention, based on the Meditech form(s) that they correspond to:

<Meditech Form #> - <Meditech Form Description>

For example: **031 - Patient Consent to Treatment** where the Document Type corresponds to Meditech Form #031, a patient consent to treatment form.

For more information on Document Type creation and configuration, see the System Administration documentation.

Keyword Types Assigned to the Document Type

Each OnBase Document Type must have at least four Keyword Types assigned to it:

- **Medical Record Number**
- **Account Number**
- **Document Date**
- **Meditech Retrieval ID**

For more information on these Keyword Types, see Keyword Types on page 108.

It is considered a best practice to configure each of these Keyword Types as **Required** Keywords for your Document Types.

For more information on assigning Keyword Types to Document Types, including information on how to specify a Keyword Type as a Required Keyword Type for a Document Type, see the System Administration documentation.

OnBase User Groups

Users who are retrieving and viewing documents stored in OnBase from within Meditech must be members of an OnBase user group with the following rights:

- The **Retrieve/View** Privilege
- The **Web Client** Product Right
- Rights to all Document Types that can be released from OnBase to Meditech

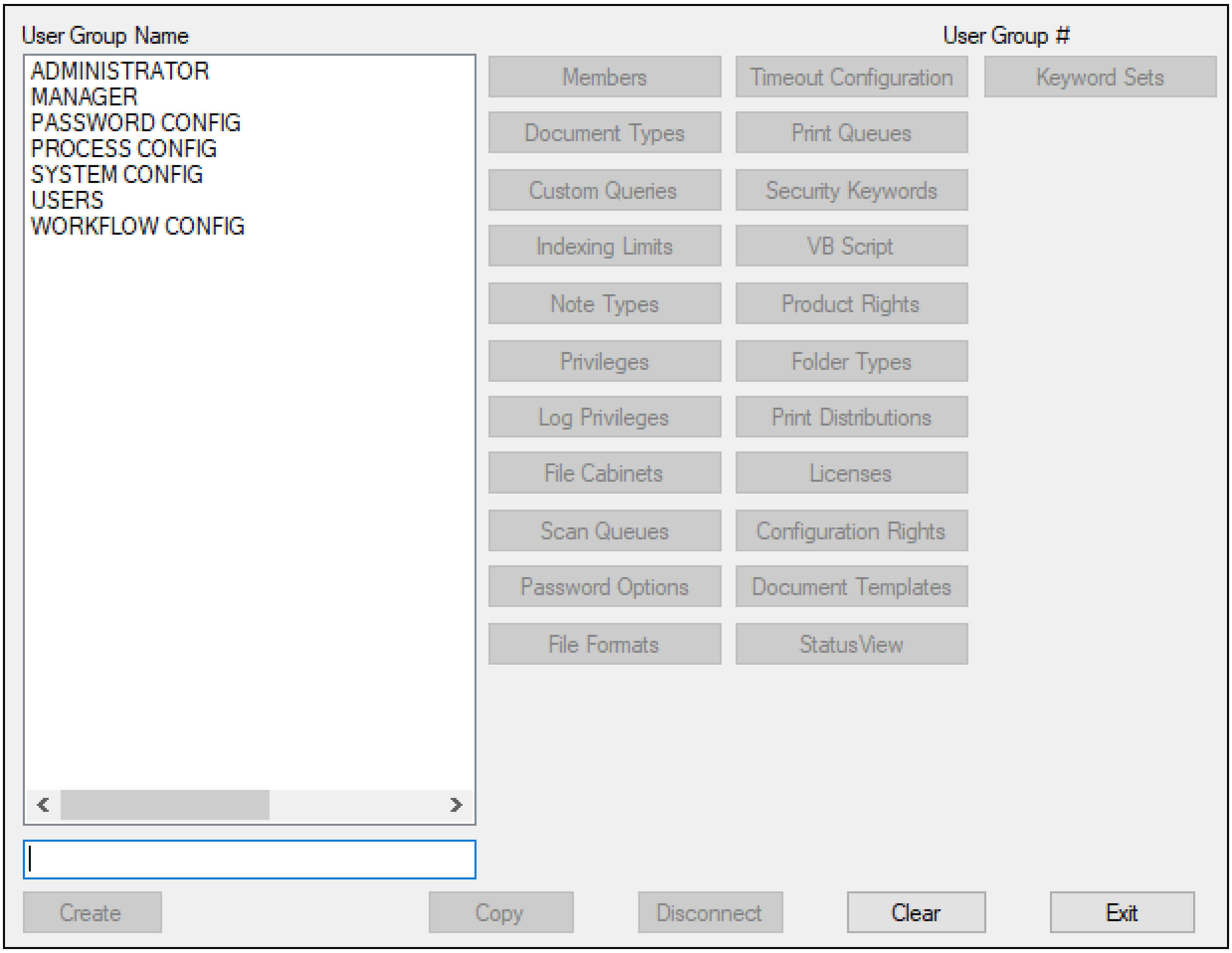
OnBase for Meditech is designed primarily to be used with Active Directory authentication, not standard OnBase security. Regardless of how users are being authenticated, you need to configure a User Group with these rights.

Note: By default, OnBase is not configured to use Active Directory authentication. Additional configuration is required. Before installing or configuring OnBase for Meditech, see the **Legacy Authentication Methods** module reference guide for information about configuring OnBase for Active Directory authentication.

For more information on authentication, see Authentication Methods on page 153.

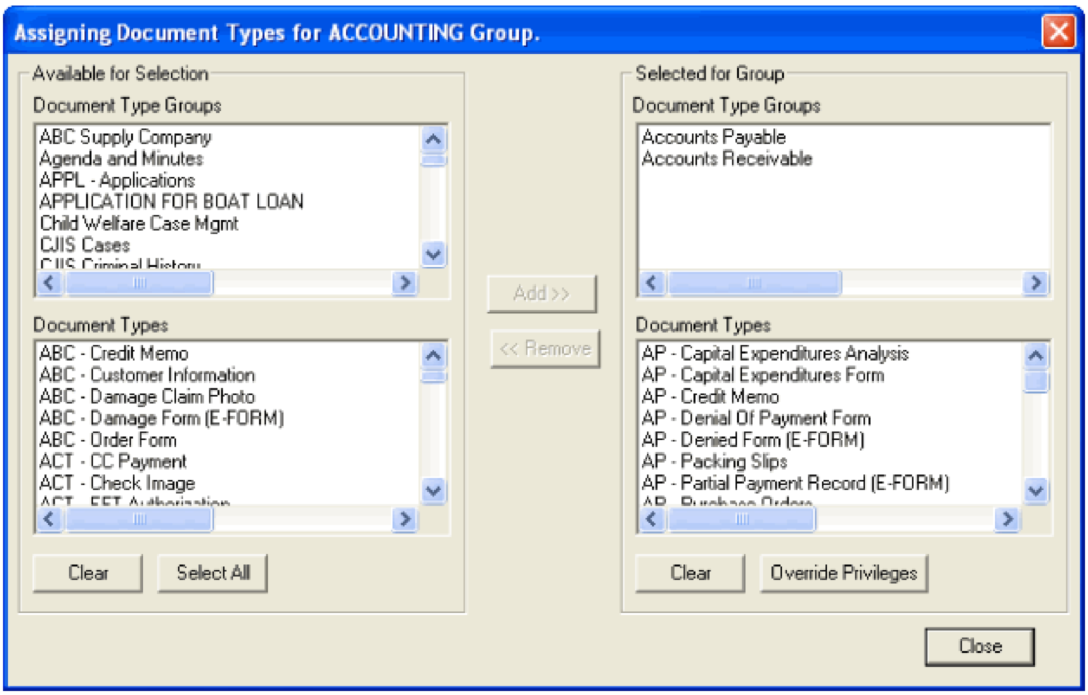
To configure an OnBase User Group for your OnBase for Meditech solution:

1. From the OnBase Configuration module, click **Users | User Groups/Rights**. The **User Groups & Rights** dialog box is displayed.



2. In the field below the **User Group Name** list, enter the name of your User Group.

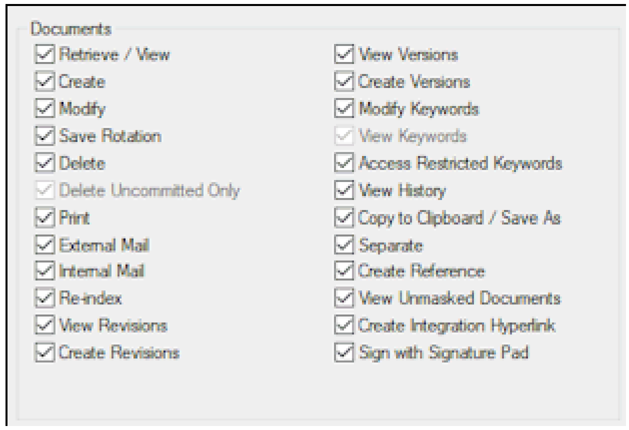
   If you are planning to authenticate users to OnBase using their network credentials via NT authentication, the User Group name must be the same as the name of the users' Active Directory group (e.g., **OnBase**).
3. Click **Create**. The User Group is created.
4. Click **Document Types**. The **Assigning Document Types for <User Group Name> Group** dialog box is displayed.



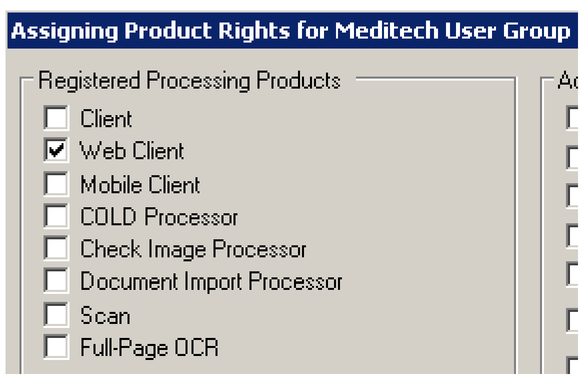
5. From the **Available for Selection** section, select all of the Document Type Groups and/or Document Types that are configured to be released from OnBase to Meditech and click **Add>>**.

   The selected Document Type Groups and/or Document Types are moved to the **Selected for Group** section.
6. Click **Close**. The **Assigning Document Types for <User Group Name> Group** is closed and you are returned to the **User Groups & Rights** dialog box.

7. Click **Privileges**. The **Assigning User Group Privileges for <User Group Name> Group** dialog box is displayed.



8. In the **Documents** section, select the **Retrieve/View** check box. It should be the only check box selected in the **Assigning User Group Privileges for <User Group Name> Group** dialog box.
9. Click **Save**. The **Assigning User Group Privileges for <User Group Name> Group** dialog box is closed and you are returned to the **User Groups & Rights** dialog box.
10. Click **Product Rights**. The **Assigning Product Rights for <User Group Name> Group** dialog box is displayed.



11. In the **Registered Processing Products** section, select the **Web Client** check box. It should be the only check box selected in the **Assigning Product Rights for <User Group Name> Group** dialog box.
12. Click **Save**. The **Assigning Product Rights for <User Group Name> Group** dialog box is closed and you are returned to the **User Groups & Rights** dialog box.
13. Click **Exit** to return to the OnBase Configuration module.

OnBase User Accounts

If you are planning to authenticate users to OnBase using Active Directory authentication, then the users' user accounts will automatically be created and assigned to the proper User Group when users attempt to log on to OnBase for the first time.

If you are using a proxy account to authenticate to OnBase, the proxy user account will also automatically be created and assigned to the proper User Group if your solution is configured for Active Directory authentication and the proxy user is a domain user account.

However, if you are not using Active Directory authentication to authenticate to OnBase, you must create OnBase user accounts for all of your users (or your proxy user) who will be retrieving and viewing documents from within Meditech. These user accounts must also be assigned to the appropriate User Group(s).

User accounts are created in the OnBase Configuration module. For more information on creating user accounts, see the **System Administration** module reference guide.

Integrating OnBase & Meditech

In an OnBase for Meditech with ODA solution, your OnBase and Meditech solutions remain separate, unique applications that communicate and share data without any custom coding.

When integrating OnBase with a Meditech Magic or Client/Server with ODA solution, the Hyland Meditech Release Service makes it possible for documents stored in OnBase to be available for retrieval from within Meditech.

Once the documents are queued, they can be retrieved, viewed, and/or printed by users from within Meditech.

- **When Integrating OnBase with a Meditech Magic with ODA Solution**. The Hyland Multiserver is needed to retrieve and view the documents queued by the HMRS from within OnBase Meditech. Documents are viewed in the OnBase for Meditech Viewer, a Hyland Software application automatically launched from within Meditech.

  The Hyland Printserver is needed if users need to print these documents from within Meditech.
- **When Integrating OnBase with a Meditech Client/Server with ODA Solution**. The Hyland Multiserver and Printserver are not needed to retrieve, view, or print documents from within Meditech.

The Hyland Multiserver also makes it possible to store Meditech Archive Reports in OnBase. Like other documents stored in OnBase, these Archive Reports can be retrieved and viewed from within Meditech as needed.

Note: The Meditech Archive Reports are encrypted. While they can be stored in OnBase, they can be viewed only within Meditech.

The following steps are required for integrating your OnBase and Meditech solutions.

1. **Define Your Meditech Configuration Settings in OnBase**. See Defining Meditech Configuration Parameters in OnBase on page 115.
2. **Configure the Hyland Meditech Release Server**. See Configuring the Hyland Meditech Release Service on page 122.
3. *(Meditech Magic Solutions Only)* **Configure the Hyland Multiserver & Printserver**. Configuring and Managing the Hyland Multiserver & Printserver on page 134.
4. **Configure the OnBase for Meditech Viewer**. See Configuring DocPop on page 142.

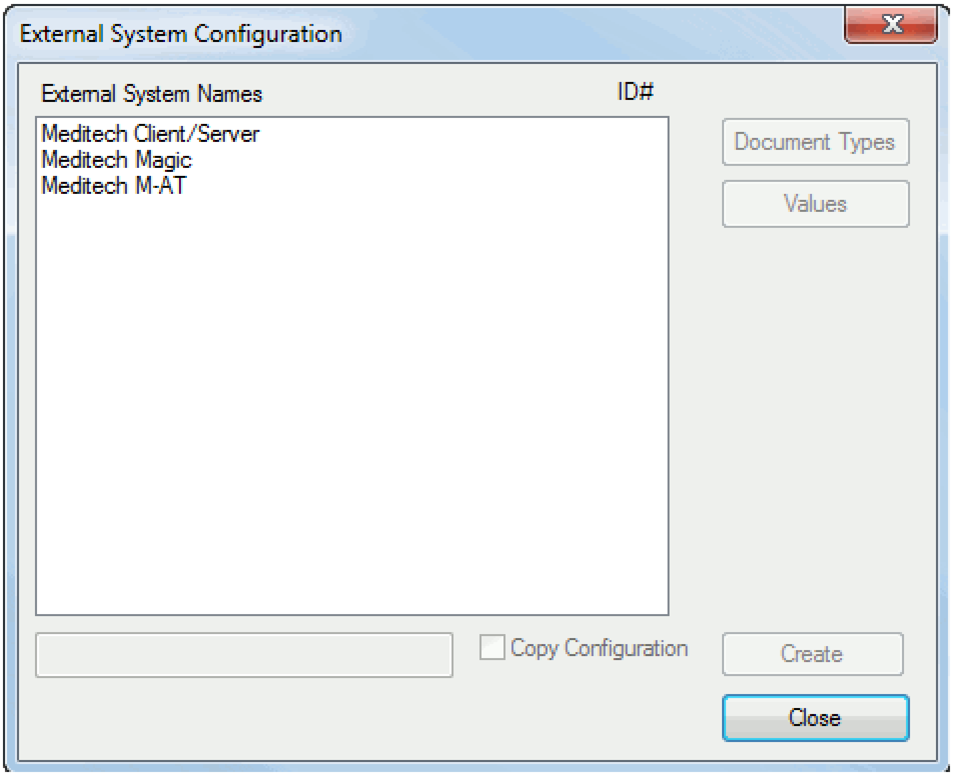
Defining Meditech Configuration Parameters in OnBase

The first step to configuring your OnBase for Meditech solution is specifying your Meditech configuration parameters in OnBase. This allows OnBase to manage the communication between itself and Meditech.

To define your Meditech configuration information in OnBase:

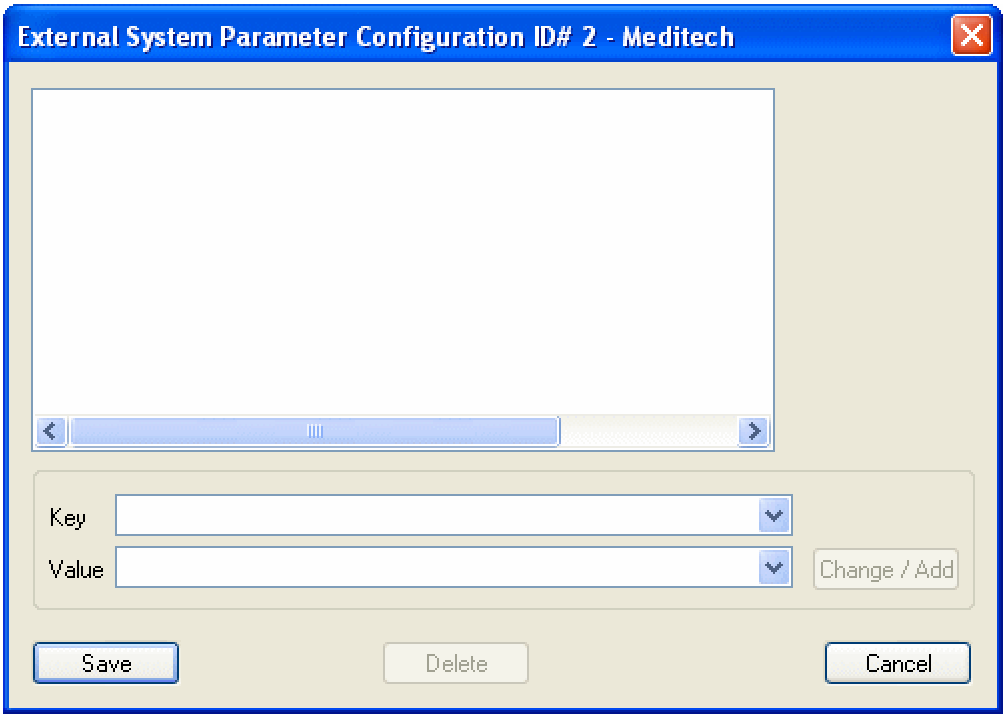
1. From the OnBase Configuration module, click **Utils | External Systems**. The **External System Configuration** dialog box is displayed.

   Note that the **Meditech** external system entry has already been created.



2. Select the **Meditech Magic** external system entry. The **Document Types** and **Values** buttons are enabled.

3. Click **Values**. The **External System Parameter Configuration <External System ID> - <External System Name>** dialog box is displayed.



4. Using the **Key** and **Value** fields, manually enter the first OnBase/Meditech configuration parameter from the list below.

Note: You can skip any parameter that does not apply to your OnBase for Meditech solution. For example: if your solution will not use a proxy user to authenticate to OnBase, you do not need to add the **Proxy User Name** parameter.

Note: All OnBase/Meditech configuration parameters are case-sensitive.

Key	Value	Description
Account Number Mask Length	Varies. Typically, this is set to 12 characters long.	This value must be set to the length of the Account Number value (in characters) used by Meditech.

Key	Value	Description
Allow Meditech Integrated Authentication	**Y** or **N**	**Note:** This setting is ignored if the **Allow Proxy User Login** setting is set to **Y**. This value tells OnBase if it should attempt to authenticate using the user's network security credentials when a login is valid in both Active Directory and Meditech or if users must provide a user name and password in order to view OnBase documents from within Meditech. Enter **Y** if your solution uses single sign on with Active Directory credentials. OnBase will attempt to authenticate users using each user's network security credentials. Enter **N** if OnBase should allow a user to enter his/her user name and password when launching the OnBase for Meditech Viewer. **Note:** The **Attempt Integrated Authentication** key must also be set to **Y** in order for this key to work.
Attempt Integrated Authentication	**Y** or **N**	**Note:** This setting is ignored if the **Allow Proxy User Login** setting is set to **Y**. **Note:** This setting is for use with the **Allow Meditech Integrated Authentication** setting. Enter **Y** if your solution uses single sign on with Active Directory credentials. OnBase will attempt to authenticate users using each user's network security credentials. Enter **N** if OnBase should allow a user to enter his/her user name and password when launching the OnBase for Meditech Viewer. **Note:** For more information on authenticating users, see Authentication Methods on page 153.
ChartPop URL	Blank	This parameter is maintained for legacy purposes only. For new medical deployments, please use the OnBase Patient Window.

Key	Value	Description
Default Document Type Name	Varies. Generally, **Meditech Archive Report**	Meditech exports archive reports to OnBase for long term storage. This value specifies the name of the OnBase Document Type that the Meditech Archive Reports are assigned to.
Default Image Document ID	Blank. May also be set to the document handle of an image document stored in OnBase.	This value specifies the document handle of the default OnBase Document Image. The default OnBase Document Image is an image document that is displayed when the OnBase for Meditech Viewer fails to display the requested document (e.g., the document is no longer available or has been deleted). If no default OnBase Document Image is specified, a default image document is displayed when the OnBase for Meditech Viewer fails to display the requested document. **Tip:** It is recommended that this setting be left blank so that the default image document is displayed when a document cannot be found.
DocPop URL	Varies. By default, it would be set to **http://<Server Name>/appnet/docpop.aspx**	This value specifies the URL to the OnBase Web Server's DocPop.aspx page.
Exclude External System ID from Retrieval ID	**Y** or **N**	This value determines if an external system's ID is included in the document retrieval ID. Enter **Y** to prevent external system IDs from being appended to the Meditech retrieval ID. Enter **N** to allow external system IDs to be appended to the Meditech retrieval ID.
Listener Address	Varies. **//<Server Name or IP Address>**	This value specifies the name or IP address of the server where the Hyland Meditech Listener has been installed. This information is available from your solution provider. The Hyland Meditech Listener is used to receive and perform authentication and Patient Verification requests.

Key	Value	Description
Listener Port	Varies. Generally, this value is set to **6779** or **6789** for **//TEST** or **6889** for **//PRD**.	This value specifies the port used by the Hyland Meditech Listener. This information is available from your solution provider. The Hyland Meditech Listener is used to receive and perform authentication and Patient Verification requests.
MRN Mask Length	Varies. Typically, this is set between 8-12 characters long.	This value must be set to the length of the Medical Record Number (i.e., Unit Number) value (in characters) used by Meditech.
Operation Timeout	3000	This value specifies the length of time (in milliseconds) that OnBase will wait for the Hyland Meditech Listener to return a response to a request for data from Meditech. Typically, this setting should be left at the default value of **3000**.
OnBase Keyword Facility Name	Varies.	If you have multiple Meditech facilities and you have a Facility Keyword defined, this value should be set to the Meditech facility code this external Meditech system serves. Alternatively, the Facility Keyword can be mapped to Chart Data Fields or specific Document Type mappings. See Mapping the Facility Keyword to Chart Data Fields on page 121 and Mapping the Required OnBase for Meditech Keywords to Meditech Values on page 125 for more information.
PatientWindow URL	Varies. The value is set to the location of the Login.aspx file.	This parameter is used to enable OnBase Patient Window to open Meditech images. The value specifies the location of the **Login.aspx** file used by OnBase Patient Window. For example: http://machine/PatientWindow/Login.aspx Refer to the **Patient Window** documentation for information on using OnBase Patient Window.
Retrieval Prefix	Varies. It is recommended that this value be set to **59** for **//TEST** and **58** for **//PRD**.	This value is used to specify the Retrieval Prefix for this OnBase for Meditech solution. When documents are archived in OnBase, they are assigned a **Meditech Retrieval ID** Keyword Value (e.g., **58_12345**). The first two digits of this Keyword Value are referred to as the Retrieval Prefix. The Retrieval Prefix is used to indicate if the document is associated with the Test system or the Production system.

Key	Value	Description
Allow Proxy User Login	**Y** or **N**	This value is used to indicate if a proxy user will be used to authenticate to OnBase when launching the OnBase for Meditech Viewer to view documents from within Meditech. Enter **N** for this setting to require users to authenticate when retrieving and viewing documents from within Meditech (via integrated authentication or by entering a user name and password). Enter **Y** to use a proxy user to authenticate to OnBase when retrieving an viewing documents from within Meditech (the user's credentials are not used). If you configure your solution to use a proxy user account, you will be unable to use features such as OnBase Document History to identify specific user interactions with documents. For example: If user John Adams logs into OnBase using your proxy user account and creates a note, that document's Document History will contain an entry stating that **Proxy User** performed a **Create Note** action. **Note:** Setting **Allow Proxy User Login** to **Y** will force the **Attempt Integrated Authentication** setting to be ignored. **Note:** For more information on authenticating users, see Authentication Methods on page 153.
Proxy User Name	Varies	**Note:** This setting is only used when **Allow Proxy User Login** is set to **Y**. This value indicates the OnBase user name of the proxy user used to authenticate to OnBase when launching the OnBase for Meditech Viewer to view documents from within Meditech. **Note:** For more information on authenticating users, see Authentication Methods on page 153.

5. Once an OnBase/Meditech configuration parameter has been entered, click **Change/ Add** to add the parameter to the list.
6. Repeat Step 4 and 5 until all OnBase/Meditech configuration parameter have been configured.

7. If an OnBase/Meditech configuration parameter needs to be modified, select it from the list and click **Change/Add**.

   To delete an OnBase/Meditech configuration parameter, select it from the list and click **Delete**.
8. Once all OnBase/Meditech configuration parameters have been correctly defined, click **Save**. The **External System Parameter Configuration <External System ID> - <External System Name>** dialog box is closed and you are returned to the **External System Configuration** dialog box.
9. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 4 to 8.

   By default, the **Meditech Client/Server** and **Meditech M-AT** options inherit the settings of the **Meditech Magic** option. If no configuration changes are made to the two override options, they retain the inherited settings. If configuration changes are made, however, they override the inherited settings, allowing you to map the same OnBase Keyword/ Document Type to different Keyword/Document Types in different Meditech systems.
10. Click **Close**. The **External System Configuration** dialog box is closed.

Mapping the Facility Keyword to Chart Data Fields

If your solution includes multiple facilities and external Meditech systems, it is recommended that a Facility Keyword Type is created to allow OnBase to determine to which Meditech system a document belongs. For more information about the recommended Facility Keyword, see Keyword Types on page 108.

The Facility Keyword must be mapped either directly to a Meditech external system or to Chart Data Fields. To map the Facility Keyword to Chart Data Fields:

1. In the Configuration module, navigate to **Medical | Charts | Data Fields**. The **Chart Data Fields Configuration** dialog box is displayed.
2. In the **Chart Data Fields** list, select **Facility Name**.
3. Click **Settings**. The **Chart Data Field Settings** dialog box is displayed.
4. In the **Keyword Settings** section, select your configured Facility Keyword Type in the **Key Value** drop-down select list.
5. Click **Save**.

Configuring the Hyland Meditech Release Service

The HMRS is used to direct document traffic between OnBase and Meditech. It has two functions:

1. To identify the Document Types that can be released from OnBase to Meditech.
2. To identify the documents stored in OnBase that may be needed for retrieval from within Meditech, identify the facilities and Meditech systems to which the documents belong, and queue these documents so they can be passed to the correct Meditech system as needed.

Note: In environments with multiple medical facilities, a separate instance of the Hyland Meditech Release Service must be configured for each medical facility. Additionally, if you want to release to Meditech SCA via specification R1457, a separate instance of the HRMS must be configured for this purpose.

If you are using Report Capture with HMRS, you have the ability to configure multiple external systems when performing document type mappings. This can possibly cause mapping conflicts, so in an effort to avoid such conflicts, see Best Practice for Using Report Capture with HMRS when Multiple External Systems Exist on page 134 to ensure that you are using the correct Form ID when releasing documents to Meditech.

Configuring Document Types To Allow Them To Be Released to Meditech

The first step to configuring the HRMS is to specify the Document Types that the HMRS can release to Meditech and then configure the Document Types so that they can be properly released.

Note: Even after the HMRS has been configured to release documents for retrieval within Meditech, be aware that only documents belonging to the specified Document Types and indexed with the four required OnBase for Meditech Keyword Values can be passed from OnBase to Meditech for retrieval/viewing.

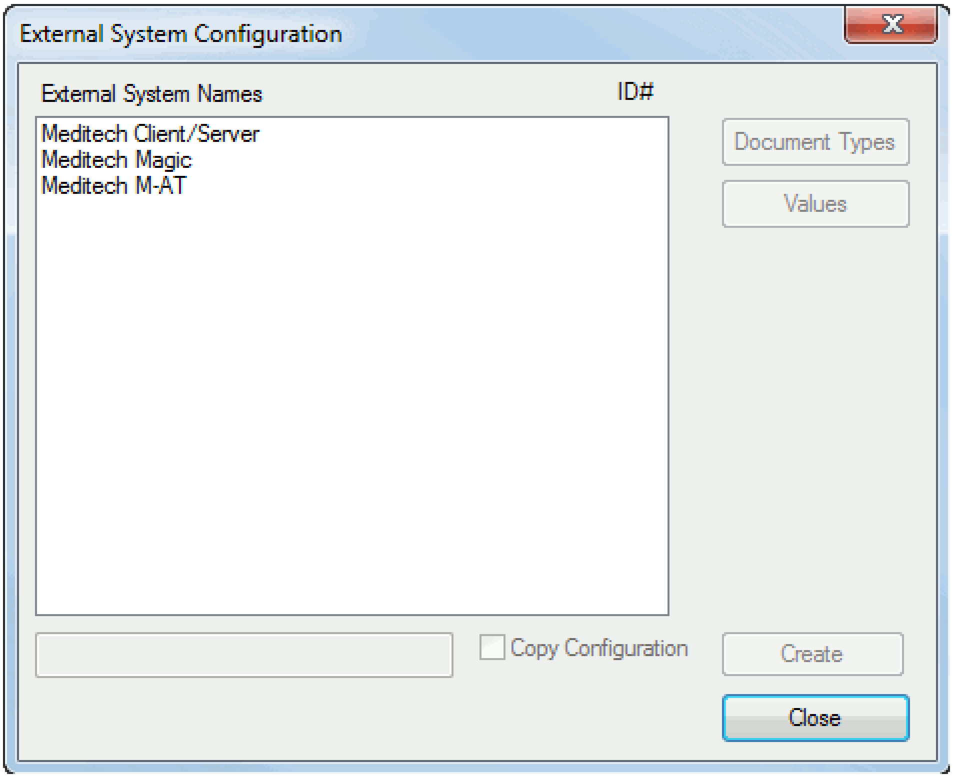
There are three steps required to configure Document Types so that the HMRS can make available to be released to Meditech:

1. **Specify the Document Types that the HMRS Can Release to Meditech**. See Specifying the Document Types To Be Released on page 123.
2. **Map the Required OnBase for Meditech Keywords to Meditech Data Values.** See Mapping the Required OnBase for Meditech Keywords to Meditech Values on page 125.
3. **Map the Specified Document Types to Meditech Forms**. Mapping OnBase Document Types to Meditech Forms on page 127.

Specifying the Document Types To Be Released

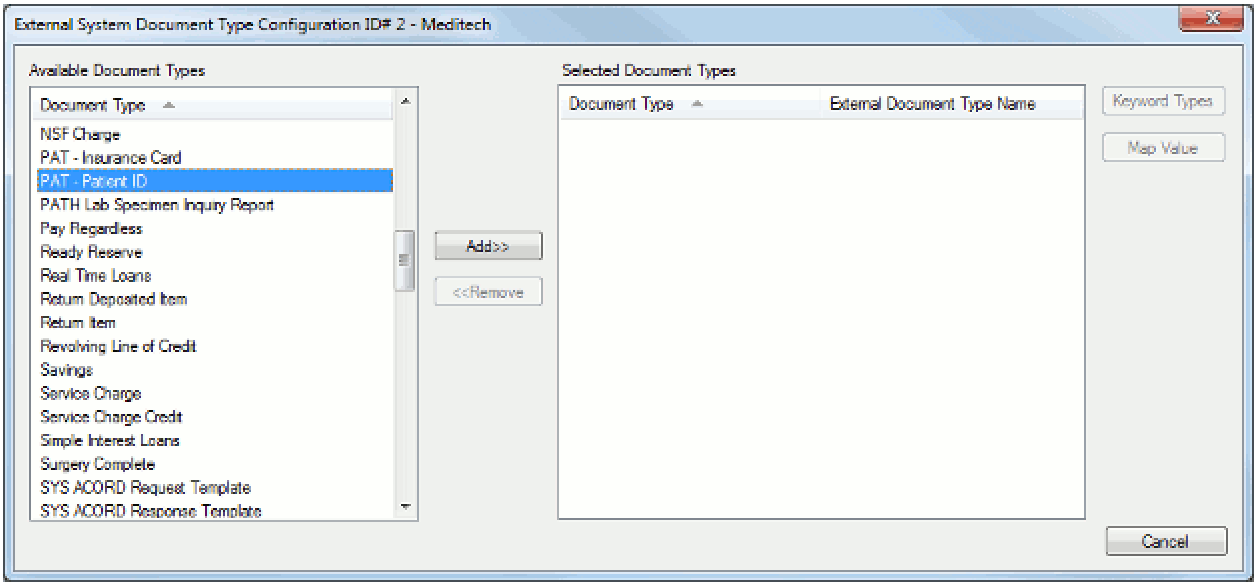
1. From the OnBase Configuration module, click **Utils | External Systems**. The **External System Configuration** dialog box is displayed.

   Note that the **Meditech Magic** external system entry has already been created.



2. Select the **Meditech Magic** external system entry. The **Document Types** and **Values** buttons are enabled.

3. Click **Document Types**. The **External System Document Type Configuration <External System ID> - <External System Name>** dialog box is displayed.



4. From the **Available Document Types** list, select the OnBase Document Type(s) that you would like to make available for release to Meditech.

Tip: Most likely, these are all of the OnBase Document Types that you previously created. See Document Types on page 109 for more information.

5. Click **Add>>**. The selected Document Type(s) are moved to the **Selected Document Types** list.

   To make a Document Type unavailable for release to Meditech, select it in the **Selected Document Types** list and click **<<Remove**. The Document Type is moved to the **Available Document Types** list.

Note: Only documents assigned to Document Types in the **Selected** list can be retrieved and viewed from within Meditech.

Note: Only PDF, TIFF, PNG, BMP, and JPG image files can be released to Meditech SCA. If you are configuring this instance of the HMRS to release to Meditech SCA, ensure that the Document Types selected are image file formats. Documents with more than one page are converted to a single multi-page TIFF file upon release. If documents are attached to a Unity form, a single multi-page TIFF file is created with the Unity form as page one, and the attached document as the subsequent pages.

Mapping the Required OnBase for Meditech Keywords to Meditech Values

Each document stored in OnBase that is to be retrieved from within Meditech must be indexed with the four required OnBase for Meditech Keyword Values (**Medical Record Number**, **Account Number**, **Document Date**, and **Meditech Retrieval ID**).

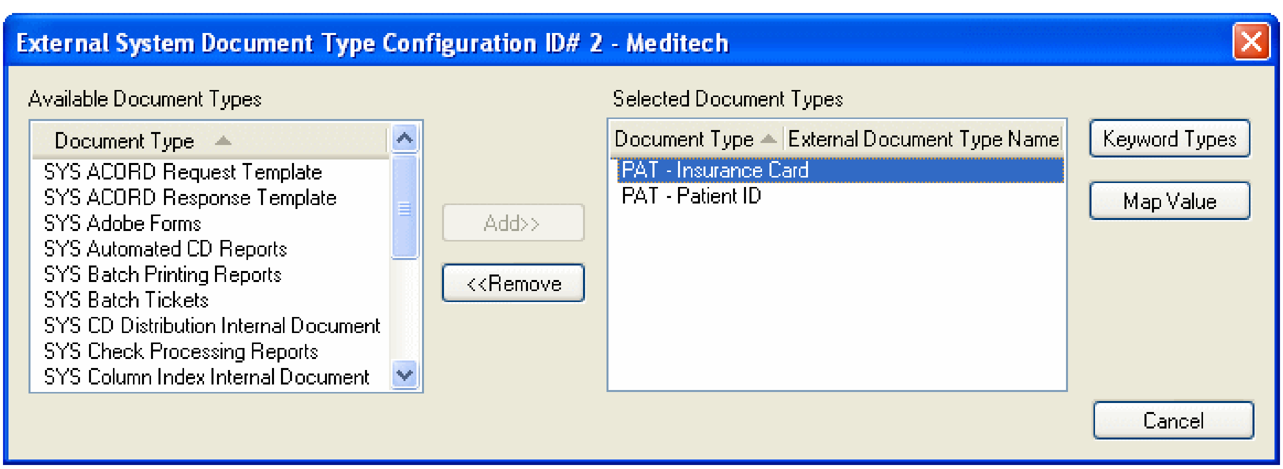
Note: This necessitates that the four required OnBase for Meditech Keyword Types (**Medical Record Number**, **Account Number**, **Document Date**, and **Meditech Retrieval ID**) are assigned to all Document Types that are identified for release to Meditech.

The four required Keyword Values must be mapped to their equivalent values in Meditech in order for OnBase and Meditech to recognize each other's data. Once you map a single required Keyword Type to its Meditech equivalent for one Document Type, all required Keyword Types will be mapped to their equivalents for all other selected Document Types.

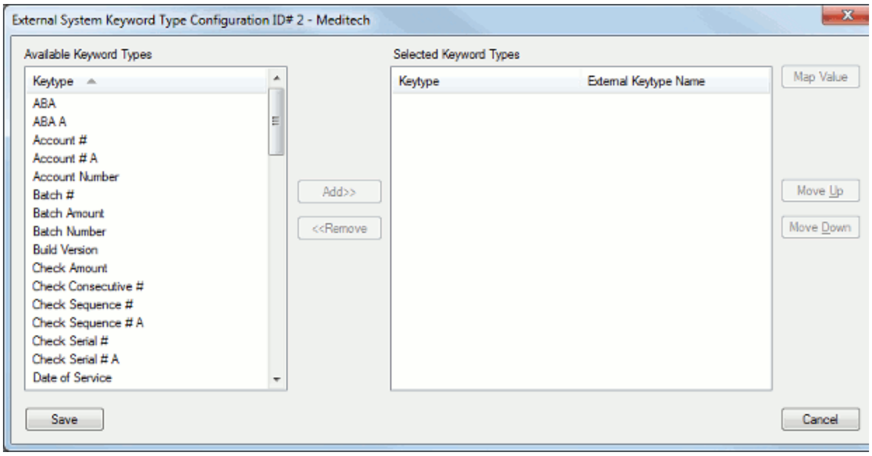
Additionally, if your solution includes multiple facilities or Meditech systems and the HMRS is configured for specific facilities, it is recommended that you map a Facility Keyword to allow the HMRS to identify the facility to which the document belongs. Alternatively, the Facility Keyword can be mapped to all Document Types in the external Meditech system, or to Chart Data Fields. See Defining Meditech Configuration Parameters in OnBase on page 115 and Mapping the Facility Keyword to Chart Data Fields on page 121 for more information.

To map the required OnBase for Meditech Keyword Types to their equivalent values in Meditech:

1. From the **External System Document Type Configuration <External System ID> - <External System Name>** dialog box, select a Document Type from the **Selected Document Types** list.

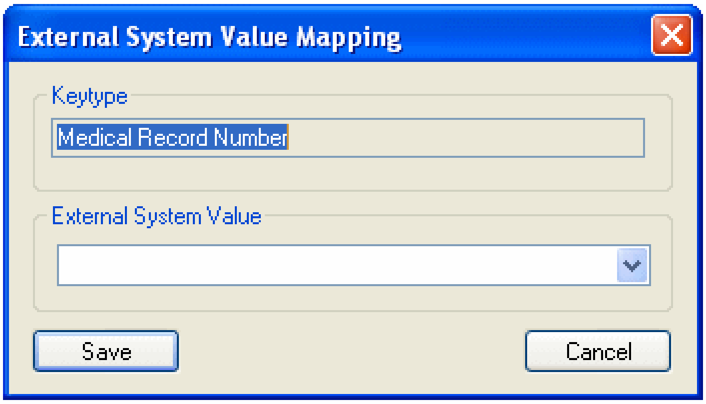


2. Click **Keyword Types**. The **External System Keyword Type Configuration <External System ID> - <External System Name>** dialog box is displayed.



3. From the **Available Keyword Types** list, select the four required OnBase for Meditech Keyword Types (**Medical Record Number**, **Account Number**, **Document Date**, or **Meditech Retrieval ID**).
4. Click **Add>>**. The selected Keyword Types are moved to the **Selected Keyword Types** list.

   To change the order of the Keyword Types in the **Selected Keyword Types** list, use the **Move Up** and **Move Down** buttons.
5. Select one of the required Keyword Type (e.g., **Medical Record Number**) from the **Selected Keyword Types** list.
6. Click **Map Value**. The **External System Value Mapping** dialog box is displayed.



7. In the **External System Value** field, enter the Meditech equivalent to the OnBase Keyword Type identified in the **Keytype** field.

   For example, the Meditech equivalent to the OnBase Keyword Type **Medical Record Number** is **Unit Number**.

Note: The Meditech equivalent value must be manually entered in the **External System Value** field. Only values that you have previously entered for other Keyword Type mappings are available from the drop-down select list.

8. Click **Save**. The **External System Value Mapping** dialog box is closed and you are returned to the **External System Keyword Type Configuration <External System ID> - <External System Name>** dialog box.

   The three remaining required OnBase for Meditech Keyword Types will be automatically mapped to the appropriate Meditech value.

Note: If an account number on a clinical document is part of a Multi-Instance Keyword Type Group and more than one account number exists on a document, the HMRS will not release the document.

Mapping OnBase Document Types to Meditech Forms

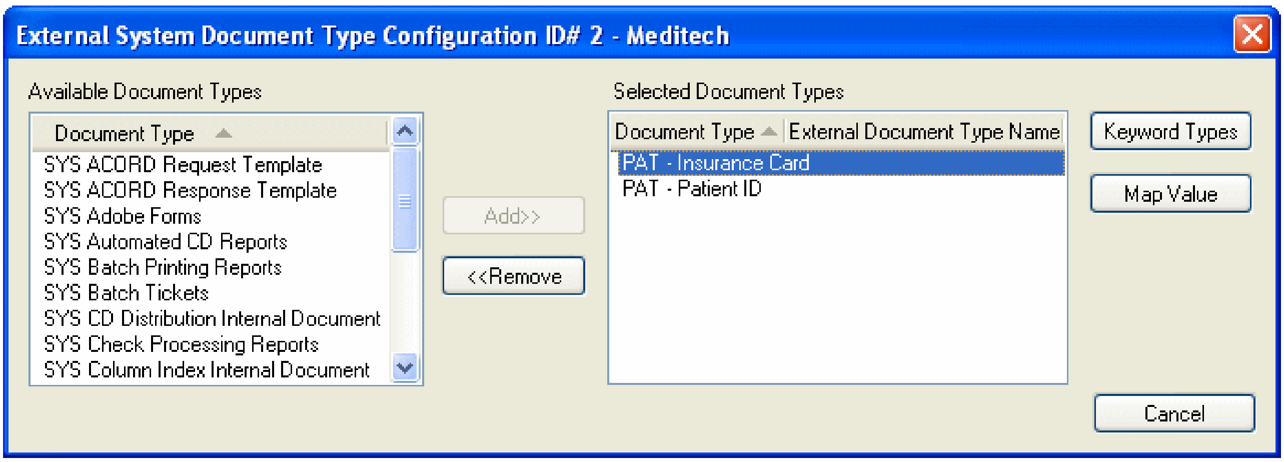
Every Document Type configured to be released to Meditech must be mapped to a related Meditech form.

Unlike the OnBase Keyword Type mapping you previously configured, this is not an apples-to-apples comparison because the OnBase Document Type is not an equivalent to the form it is mapped to in Meditech. Rather, the mapping represents that some type of relationship exists between the OnBase Document Type and the Meditech form.

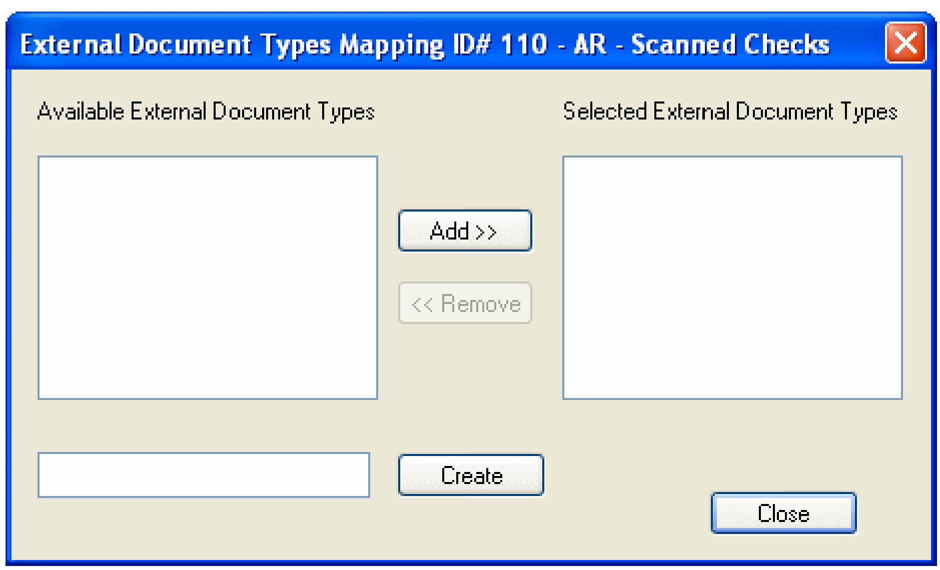
Mapping an OnBase Document Type to a Meditech form allows you to release documents assigned to that Document Type from that Meditech form.

To map an OnBase Document Type to a Meditech form:

1. From the **External System Document Type Configuration <External System ID> - <External System Name>** dialog box, select a Document Type from the **Selected Document Types** list.



2. Click **Map Value**. The **External Document Types Mapping** dialog box is displayed.



3. Type the Meditech Form ID for the Meditech form in the **External System Value** field, then click **Create**. The Meditech form will be added to the **Selected External Document Types** list.

Note: You can map multiple Meditech forms to the same OnBase Document Type.

4. Click **Close**. The **External Document Types Mapping** dialog box is closed and you are returned to the **External System Document Type Configuration <External System ID> - <External System Name>** dialog box.

5. Repeat Steps 1-4 for all remaining Document Types in the **Selected Document Types** list.
6. When finished, click **Cancel**. The **External System Document Type Configuration <External System ID> - <External System Name>** dialog box is closed and you are returned to the **External System Configuration** dialog box.
7. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate. Then repeat all configuration procedures outlined in the sections above, starting with Configuring Document Types To Allow Them To Be Released to Meditech on page 122.

   By default, the **Meditech Client/Server** and **Meditech M-AT** options inherit the **Key-Value** pair settings of the **Meditech Magic** option. If no configuration changes are made to the two override options, they retain the inherited settings. If configuration changes are made, however, they override the inherited settings, allowing you to map the same OnBase Keyword/Document Type to different Keyword/Document Types in different Meditech systems.

Note: The override options do not inherit the Document Type mappings of the **Meditech Magic** option. You must manually map the Document Types for each override option you wish to use, even if you wish to maintain the same Document Type mappings you configured for the **Meditech Magic** option.

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8. When you are finished configuring your Document Types for Meditech, click **Close**. The **External System Configuration** dialog box is closed.

Configuring the HMRS To Queue Documents for Retrieval from Meditech

Once you have specified the Document Types that the HMRS will make available for release to Meditech, you must configure the Hyland Meditech Release Service to identify and queue the documents stored in OnBase so they can be passed to the correct Meditech system once they are needed.

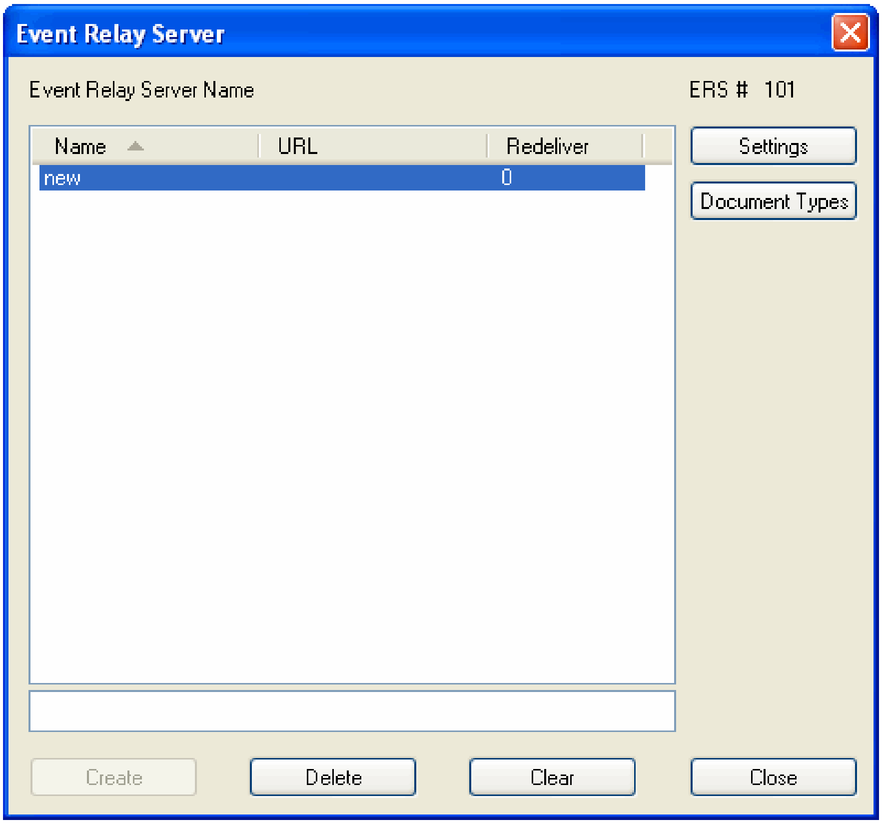
The HMRS works with another OnBase feature, the Event Relay Server, to identify and queue these documents.

To configure the Event Relay Server to work with the HMRS, you must:

1. **Configuring the Event Relay Server for the HMRS**. See Configuring the Event Relay Server for HMRS on page 130.
2. **Identify the Document Types Available to the Event Relay Server & HMRS**. See Identifying Document Types Available to the Event Relay Server & HMRS on page 132.

Configuring the Event Relay Server for HMRS

1. From the OnBase Configuration module, click **Utils | Event Relay Server | Configuration**. The **Event Relay Server** dialog box is displayed.

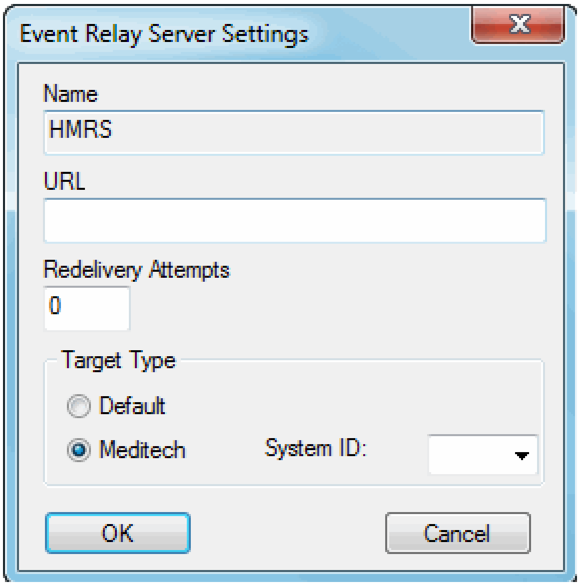


2. Enter **HMRS** in the field beneath the **Name** list.

3. Click **Create**.

Note: You must create an Event Relay Server for each instance of the Hyland Meditech Release Service.

The **Event Relay Server Settings** dialog box is displayed.



4. In the **Target Type** section, select the **Meditech** radio button.

   In the **System ID** drop-down select list, choose a Meditech system ID.

Note: When configuring the Event Relay Server for HMRS, the **URL** and the **Redelivery Attempts** fields are not used.

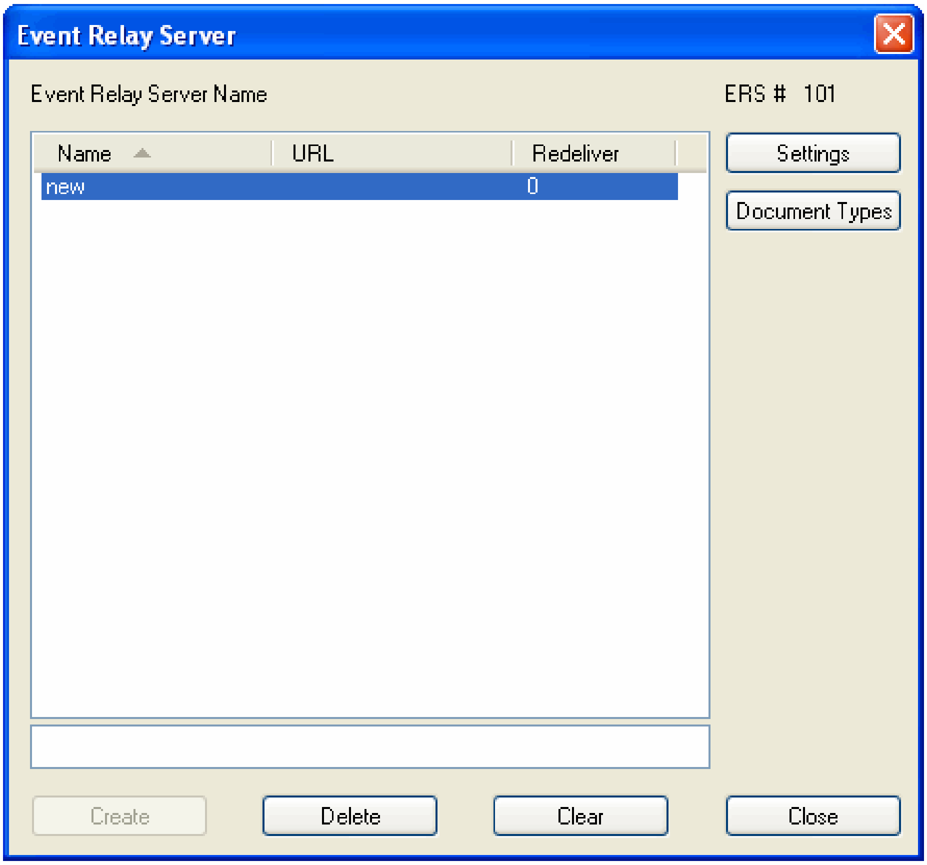
5. Click **OK**. The **Event Relay Server Settings** dialog box is closed and you are returned to the **Event Relay Server** dialog box.

Identifying Document Types Available to the Event Relay Server & HMRS

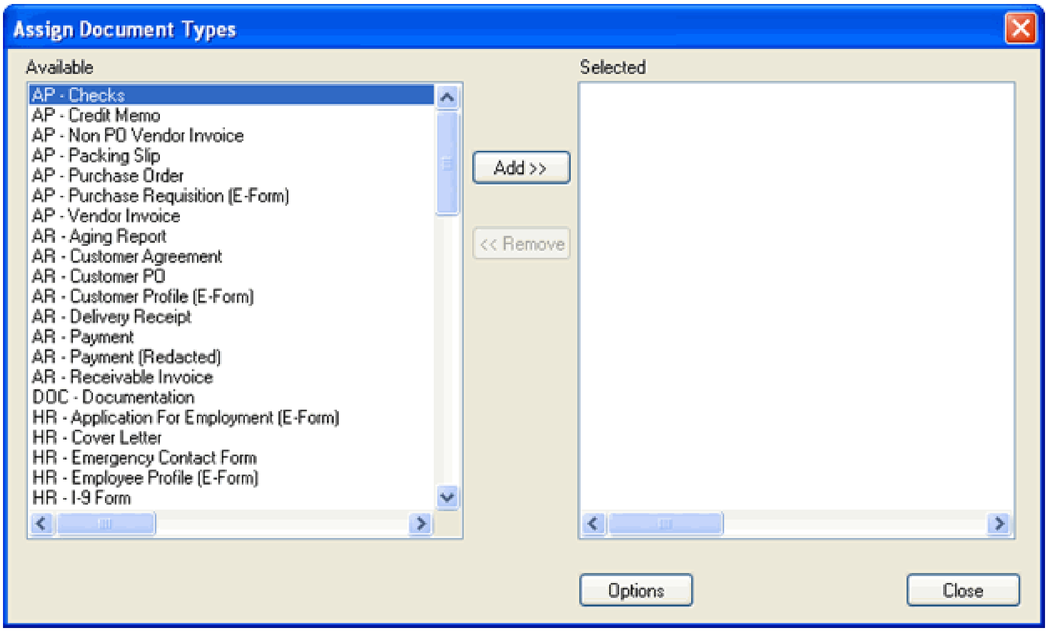
Once you have configured the Event Relay Server to work with the Hyland Meditech Release Service, you must specify the Document Types that the Event Relay Service can queue for the HMRS.

Note: Likely, you will specify all of the same Document Types below as you previously configured to be able to be released to Meditech by the HMRS (see Configuring Document Types To Allow Them To Be Released to Meditech on page 122). However, there may be rare circumstances where you want to make a Document Type available to Meditech, but you do not want to actually queue any documents assigned to this Document Type for retrieval from Meditech; in this case, you would NOT make that Document Type available to the Event Relay Server.

1. From the OnBase Configuration module, click **Utils | Event Relay Server | Configuration**. The **Event Relay Server** dialog box is displayed.



2. Select HMRS from the **Name** list and click **Document Types**. The **Assign Document Types** dialog box is displayed.



3. From the **Available** list, select the Document Type(s) that you want the Event Relay Server to be able to queue so the HMRS can make them available for retrieval from within Meditech.
4. Click **Add>>**. The selected Document Types(s) are moved to the **Selected** list.

   To make a Document Type unavailable to the Event Relay Server (making documents assigned to it unavailable for retrieval from within Meditech), select it in the **Selected** list and click **<<Remove**. The Document Type is moved to the **Available** list.

Note: Likely, you will specify all of the same Document Types below as you previously configured for the HMRS (see Configuring Document Types To Allow Them To Be Released to Meditech on page 122). However, there may be rare circumstances where you want to make a Document Type available to Meditech, but you do not want to actually queue any documents assigned to this Document Type for retrieval from Meditech; in this case, you would NOT make that Document Type available to the Event Relay Server.

Note: Only documents assigned to Document Types in the **Selected** list can be retrieved and viewed from within Meditech.

5. When finished, click **Close**. The **Assign Document Types** dialog box is closed and you are returned to the **Event Relay Server** dialog box.

Best Practice for Using Report Capture with HMRS when Multiple External Systems Exist

When multiple external systems became available in OnBase 14, the possibility of mapping conflicts arose. The solution to avoid possible mapping conflicts between OnBase Document Types and the External Document Type Names would be for Report Capture and HMRS to use different instances of a Meditech external system. It is recommended that HMRS should use the default Meditech external system (either Meditech or Meditech Magic) with an ID number of 2. Report Capture should also always use an external system derived form a Meditech external system. Any additional Meditech ODA System should also use external systems derived from a Meditech external systems.

The best practices for using Report Capture with HMRS when multiple external systems exist are:

1. If you are currently using OnBase 13 or below, and you use the same external system for both HMRS and Report Capture, do NOT use multiple Meditech Form ID mappings for a single OnBase document type where that OnBase document type is also used by HMRS. See your system administrator to determine whether a single OnBase document type is mapped to multiple Meditech external document types.
2. If you are currently using OnBase 14 or above, Report Capture should be configured to use a derived Meditech external system.
3. If you are upgrading from an older version of OnBase to OnBase 14 or above, and you are using Report Capture, you will need to make a new Meditech external system for use by Report Capture. The best way to do this is to use the copy feature. See Creating Additional External Systems on page 143 for more information.
4. If you are installing Report Capture for the first time, you should always use a derived Meditech external system for Report Capture configuration.
5. If you use the same Meditech external system for both Report Capture and HMRS, see Separating a Meditech External System for Report Capture Configuration on page 144 to separate the Report Capture configuration from the HMRS configuration.

Configuring and Managing the Hyland Multiserver & Printserver

Note: The Hyland Multiserver and Printserver are used only for OnBase for Meditech Magic with ODA solutions. They are not used when integrating OnBase with Meditech Client/Server with ODA solutions or any non-ODA Meditech solutions.

The Hyland Multiserver allows documents stored in OnBase to be retrieved and viewed from within Meditech as part of an OnBase for Meditech Magic with ODA solution. The Multiserver is also used to store Meditech Archive Reports within OnBase. The Hyland Printserver allows documents stored in OnBase to be printed from Meditech.

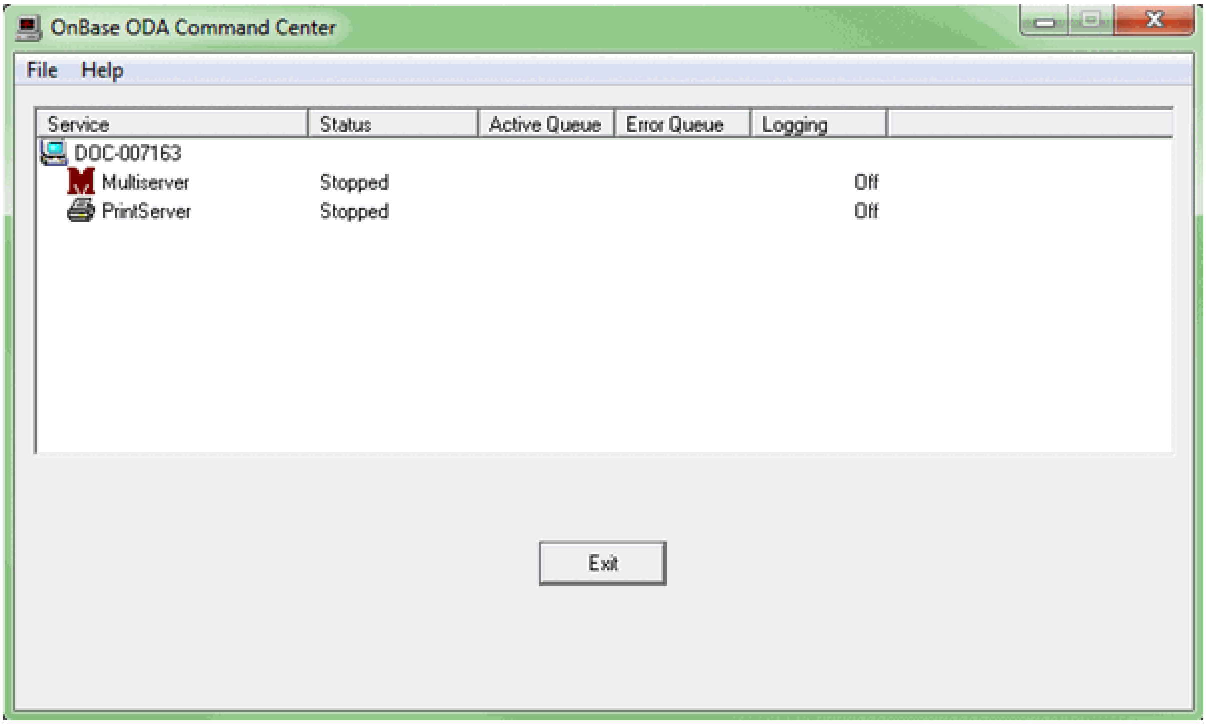
The Multiserver is a required piece of your OnBase for Meditech Magic with ODA solution. The Printserver is not required, but without it, users will not be able to print documents stored in OnBase from Meditech.

Both the Multiserver and Printserver run as services on your processing server.

The Multiserver Command Center

The Hyland Multiserver and Printserver are configured and managed in the Multiserver Command Center.

To launch the Multiserver Command Center, double-click the **Multiserver Command Center** shortcut on the processing server's desktop. The **OnBase ODA Command Center** window is displayed.



From the Multiserver Command Center, you can view the server and the Multiserver and Printserver services. For each service, you can view its status, its active queue, its error queue, and its current logging level.

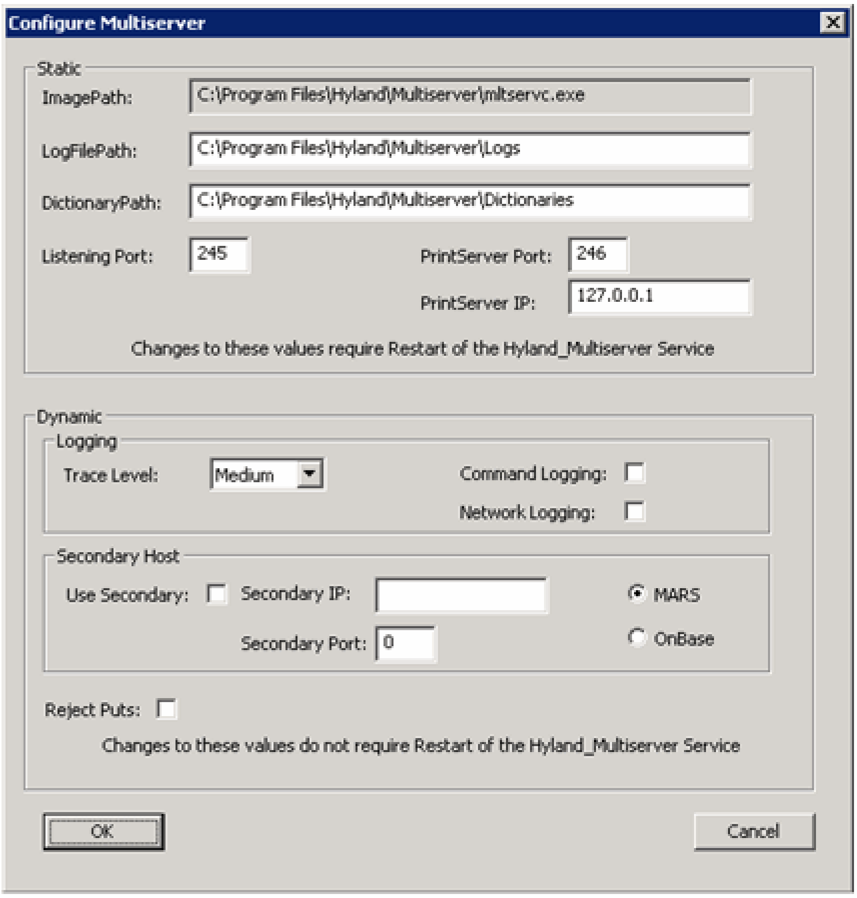
Additionally, you can also open the Windows **Run** dialog box by clicking **File | Run**.

To exit the Multiserver command center, click **File | Exit** or click the **Exit** button.

Configuring and Managing the Multiserver

To configure or manage the Multiserver, right-click on the Multiserver service. To configure the Multiserver, follow these steps:

1. From the Multiserver Command Center, right-click on your Multiserver service and select **Configure**. The **Configure Multiserver** window is displayed:



2. Configure your Multiserver as required. The following options are available:

Option	Description
ImagePath	This field contains the path to your Multiserver executable. This field cannot be modified.
LogFilePath	This field contains the path to the directory that will store your Multiserver log file. It is recommended that you set this field to a subdirectory of the path to your Multiserver executable (for example, **C:\Program Files\Hyland\Multiserver\Logs**). **Note:** A log file will only be saved to the **LogFilePath** directory if your **Trace Level** setting is set to **Medium**.

Option	Description
DictionaryPath	This field contains the path to the directory that will store dictionary files that a user attempts to send to a MARS server. It is recommended that you set this field to a subdirectory of the path to your Multiserver executable (for example, **C:\Program Files\Hyland\Multiserver\Dictionaries**). In some organizations, users may have become accustomed to copying dictionary files stored within Meditech to a MARS server. Because this is no longer necessary when using OnBase for Meditech, your **DictionaryPath** directory will be used to store any dictionary files that are accidentally sent to a MARS server through force of habit.
Listening Port	This option must be set to **245**.
PrintServer Port	If your Meditech system makes use of Meditech's print functionality, you should configure this value with the number of the Port that Meditech communicates with in order to send print jobs. If you do not use Meditech's print functionality, you can leave this value blank.
PrintServer IP	If your Meditech system makes use of Meditech's print functionality, you should configure this value with the IP address that Meditech communicates with in order to send print jobs. If you do not use Meditech's print functionality, you can leave this value blank.
Trace Level	This option controls whether a Multiserver log file will be generated. This log file will be stored in the **LogFilePath** directory you have configured. To enable logging, you should set the **Trace Level** option to **Medium**. If you do not want to generate a Multiserver log file, you should set the **Trace Level** to **Off**.
Command Logging	This option is maintained for legacy purposes and should not be selected.
Network Logging	This option is maintained for legacy purposes and should not be selected.
Use Secondary	Select this option if the Multiserver needs to access a secondary server for additional data files that may not be located in the primary server. This secondary server could be a MARS server or another OnBase server.
Secondary IP	This field should be set to the IP address of your secondary server. This field is only used if the **Use Secondary** option is selected. **Caution:** Never set the **Secondary IP** to the IP address of your primary server.
Secondary Port	This field should be set to **245**. This field is only used if the **Use Secondary** option is selected.

Option	Description
MARS	Select this option if your secondary server is a MARS server.
OnBase	Select this option if your secondary server is an OnBase server.
Reject Puts	This feature is maintained for legacy purposes and should not be selected.

3. After making all required changes, click **OK**.
4. Stop and restart your Multiserver to ensure that your changes take effect. For more information on starting and stopping your Multiserver service, see Starting Or Stopping A Service on page 141.

Configuring the Multiserver for Multiple Meditech Systems

If your environment contains multiple Meditech systems, the Multiserver can be configured for a specific Meditech system. A new Multiserver must be installed and configured for each Meditech system.

To configure the Multiserver for a specific Meditech system, configure the following settings in the **applicationSettings** element of the **mltservc.exe.config** file:

Setting	Description
ExternalMeditechSystemTypeID	Set the value to the ID number of the Meditech system for which you want to configure the Multiserver. The default value is **2**, which is the ID number for the default Meditech external system.
FacilityName	If you have multiple facilities configured and you want to specify which facility the Multiserver serves, set the value to the name of the specific facility.

Configuring the Printserver

To configure your Printserver, you must manually edit your print.ini configuration file and then configure the print service within the Command Center utility.

Editing the print.ini Configuration File

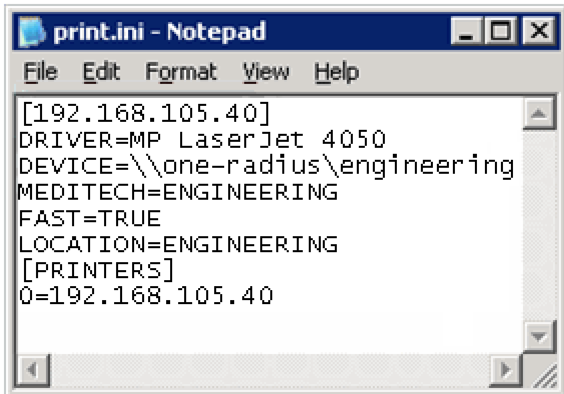
You must configure the print.ini file with information for every printer that your organization uses. Typically, the print.ini file is stored at **C:\Program Files\Hyland\Printserver\print.ini**

You must configure the following information for each printer used by your Printserver:

Field	Description
DRIVER	This field contains the common name of the printer.

Field	Description
DEVICE	This field contains the path to the configured printer location.
MEDITECH	This field contains the name of the printer as displayed within Meditech.
FAST	Set this field to **TRUE**.
LOCATION	This field contains the description of the printer's location.

For example, see the following configuration file:




```
[192.168.105.40]
DRIVER=MP LaserJet 4050
DEVICE=\\one-radius\engineering
MEDITECH=ENGINEERING
FAST=TRUE
LOCATION=ENGINEERING
[PRINTERS]
0=192.168.105.40
```

Configuring Print Format Settings

By default, the Printserver does not respect the orientation specified in a Document Type's configured print format. To configure the Printserver to respect the orientation specified in a Document Type's default print format, complete the following process:

1. Open the **print_server.exe.config** file in a text editor.
2. Locate the following setting:

```
<add key="EnableOnBaseDocumentPrintFormat" value="false" />
```

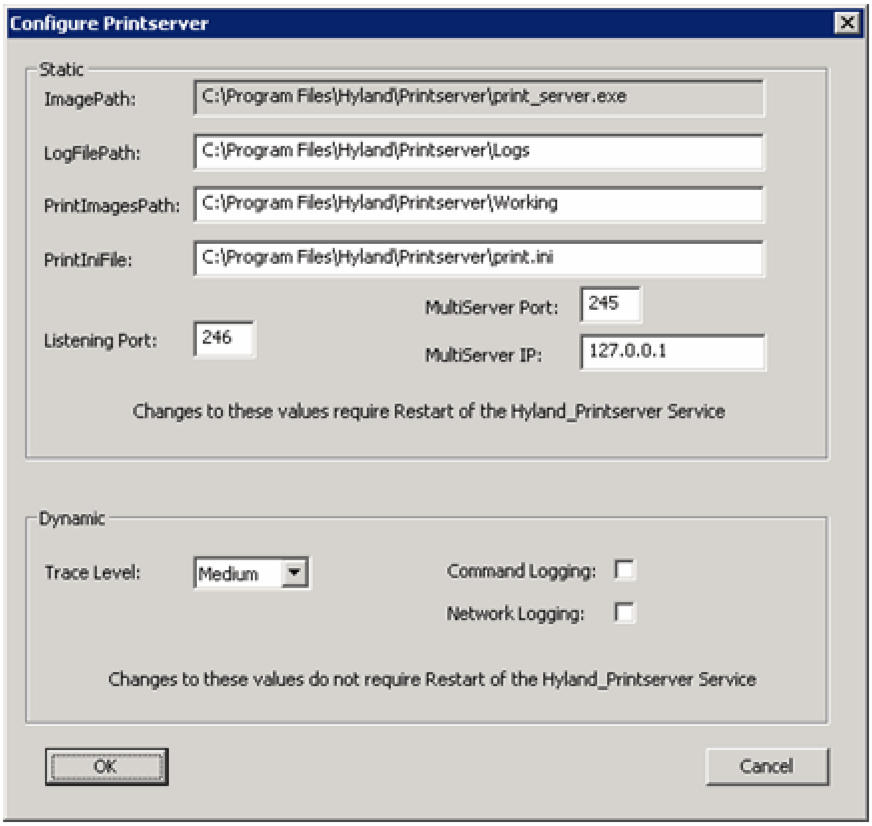
3. Set the value to **true** to configure the Printserver to respect the orientation specified in OnBase Document Type print formats.

Note: Only Portrait and Landscape print formats are supported. The Auto Orientation print format is not supported.

Configuring the Print Service

To configure the Printserver, follow these steps:

1. From the Multiserver Command Center, right-click on your Printserver service and select **Configure**. The **Configure Printserver** window is displayed:



2. Configure your Printserver as required. The following options are available:

Option	Description
ImagePath	This field contains the path to your Printserver executable. This field cannot be modified.
LogFilePath	This field contains the path to the directory that will store your Printserver log file. It is recommended that you set this field to a subdirectory of the path to your Printserver executable (for example, **C:\Program Files\Hyland\ Printserver\Logs**). **Note:** A log file will only be saved to the **LogFilePath** directory if your **Trace Level** setting is set to **Medium**.

Option	Description
PrintImagesPath	This field contains the path to the directory that will temporarily store the data files being printed. It is recommended that you set this field to a subdirectory of the path to your Printserver executable (for example, **C:\Program Files\Hyland\Printserver\Working**).
PrintIniFile	This field contains the path to the print.ini configuration file, including the file name (for example, **C:\Program Files\Hyland\Printserver\print.ini**).
Listening Port	Set this option to **246**.
MultiServer Port	Set this option to **245**.
MultiServer IP	Set this option to the IP address of the server running your Multiserver.
Trace Level	This option controls whether a Printserver log file will be generated. This log file will be stored in the **LogFilePath** directory you have configured. To enable logging, you should set the **Trace Level** option to **Medium**. If you do not want to generate a Printserver log file, you should set the **Trace Level** to **Off**.
Command Logging	This option is maintained for legacy purposes and should not be selected.
Network Logging	This option is maintained for legacy purposes and should not be selected.

3. After making all required changes, click **OK**.
4. Stop and restart your Printserver to ensure that your changes take effect. For more information on starting and stopping your Printserver service, see Starting Or Stopping A Service on page 141.

Starting Or Stopping A Service

To stop a Multiserver or Printserver service that is currently running, open the Multiserver Command Center and right-click on your Multiserver or Printserver service. Then click **Stop**.

To start a Multiserver or Printserver service that is currently stopped, open the Multiserver Command Center and right-click on your Multiserver or Printserver service. Then click **Start**.

Viewing A Log File

You can open a service's log file (if one is configured) by opening the Multiserver Command Center and right-clicking on your Multiserver or Printserver service. Then click **View Log** - your log file will be opened in your default text editing program.

Modifying The Logging Level

You can modify the **Logging Level** of a service without opening the service's Configuration dialog. To do so, open the Multiserver Command Center and right-click on your Multiserver or Printserver service. Then select **Logging Level** and select your desired logging level.

To enable logging, you should set this option to **Medium**. If you do not want to generate a Multiserver or Printserver log file, you should set the **Trace Level** to **Off**.

Configuring DocPop

The OnBase for Meditech Viewer uses DocPop to display OnBase documents to your Meditech users. To configure your solution to use DocPop, follow these steps:

1. Open the Web Server's web.config file and navigate to the **DocPop Vars** section.
2. Set the **DPDataSource** value to the data source name to use with DocPop.
3. Set the **DPDomain** value to the domain to log on to if you are using Active Directory authentication.
4. Set the **AutoDisplayOneDocument** to **True** to always display only the viewer for DocPop queries that return a single result.

To configure the viewer to use a browser other than the default web browser:

1. Open the **t_viewerApp.exe.config** file. See Installing the OnBase for Meditech Viewer via the Setup Wizard on page 39 for more information about the default installation location of the Meditech Viewer.
2. Navigate to the **WebBrowser** setting.

   <add key="WebBrowser" value="Default"/>
3. Set the value to one of the following:
   - **Default** - the user's default browser configured for Windows will be used.
   - **InternetExplorer** - Internet Explorer will be used.
   - **Firefox** - Firefox will be used.

Note: The viewer must be configured to run as an administrator in order to use Firefox with Windows 8.1 and higher.

   - **Chrome** - Google Chrome will be used.

Note: Ensure that the selected browser is installed on the workstation.

To configure the viewer to display more than one OnBase document at a time:

1. Open the **t_viewerApp.exe.config** file. See Installing the OnBase for Meditech Viewer via the Setup Wizard on page 39 for more information about the default installation location of the Meditech Viewer.
2. Navigate to the **EnableMultipleDocumentViewing** setting.

   <add key="EnableMultipleDocumentViewing" value="false"/>

3. Set the value to **true** to view additional OnBase documents in separate web browser tabs or windows.

Note: All documents must be closed before you can use OnBase for Meditech again.

To configure the viewer to launch in HTML mode only:

1. Open the **t_viewerApp.exe.config** file. See Installing the OnBase for Meditech Viewer via the Setup Wizard on page 39 for more information about the default installation location of the Meditech Viewer.
2. Navigate to the **ViewerClientType** setting.
3. Set the value to **HTML** in order to always use the HTML Viewer.

   If no value is set, the ActiveX Viewer is always used.

For T-Image users, you can configure the viewer to launch DocPop instead of Patient Window:

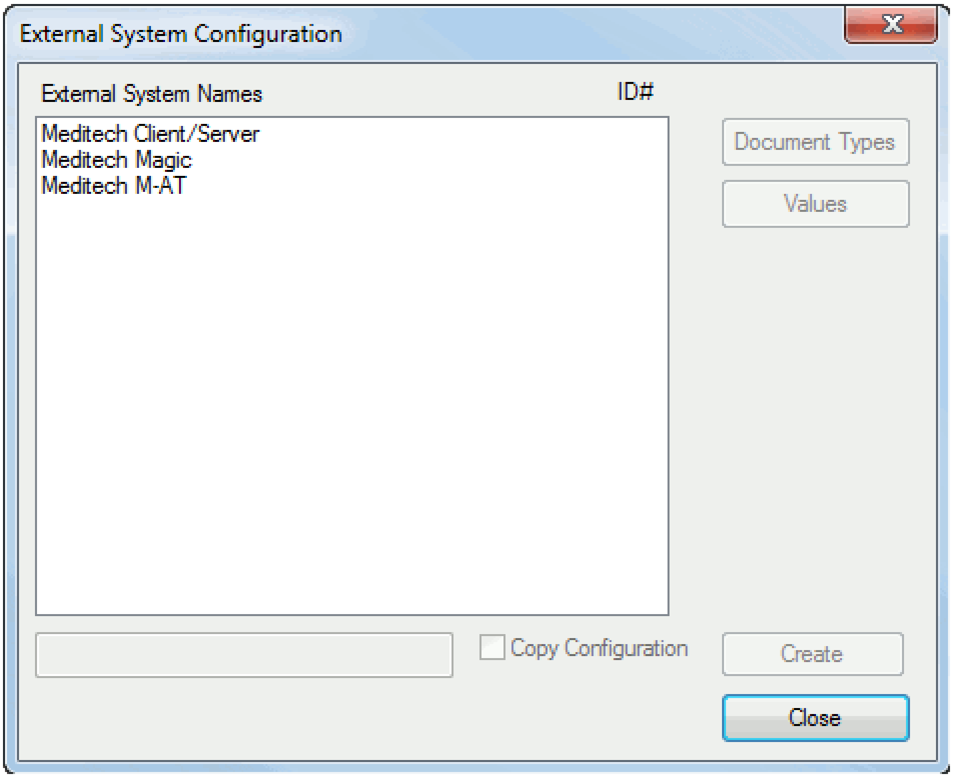
1. Open the **app.config** file in **Hyland.Integrations.Meditech.timage**.
2. Set the value for the **UseDocPop** setting to True.

Creating Additional External Systems

If you have multiple Meditech systems, you can create and configure additional Meditech systems in the Configuration module.

To create an additional Meditech system, complete the following steps:

1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



2. In the **External System Names** list, select either **Meditech Magic**, **Meditech Client/Server**, or **Meditech M-AT**. With one of these default external systems selected, a field becomes available below the **External System Names** list. Type a name for the new external system in that field.
3. Select **Copy Configuration** if you want to copy the Document Type configuration and External System Parameters of the selected external system. If **Copy Configuration** is selected, the new system will be created with the same configuration settings as the selected default external system.

   Click **Create** to create the new external system.

Separating a Meditech External System for Report Capture Configuration

If you are using the same Meditech external system for both Report Capture and HMRS, you must separate the Report Capture configuration from the HMRS configuration.

To separate the Report Capture configuration from the HMRS configuration you must:

- Stop the Report Capture Windows Services
- Create a new External System for Report Capture

- Replace the default External System with the new External System in Facility Configuration
- Update the Report Capture Services Configuration
- Restart IIS

Stopping the Report Capture Windows Services

To stop the Report Capture Windows Services, navigate to **Start** | **Control Panel** | **Administrative Tools** | **Services** to stop the following services:

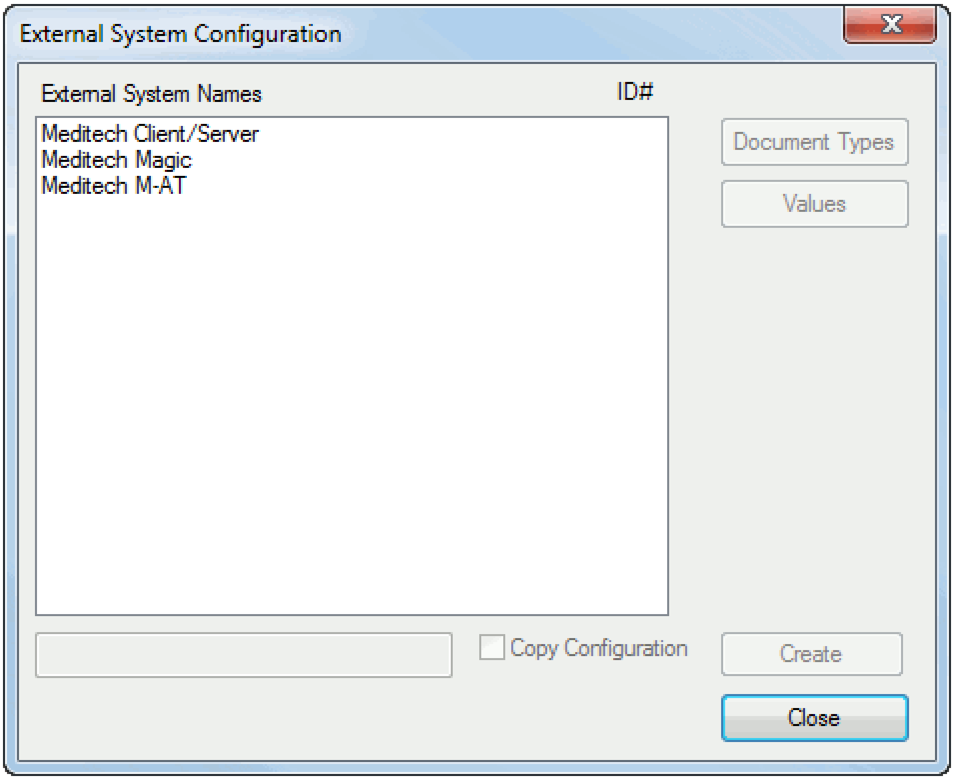
- Report Capture Importer
- Report Capture Validator
- Report Capture Loader
- Report Capture Polling

Creating a new External System for Report Capture

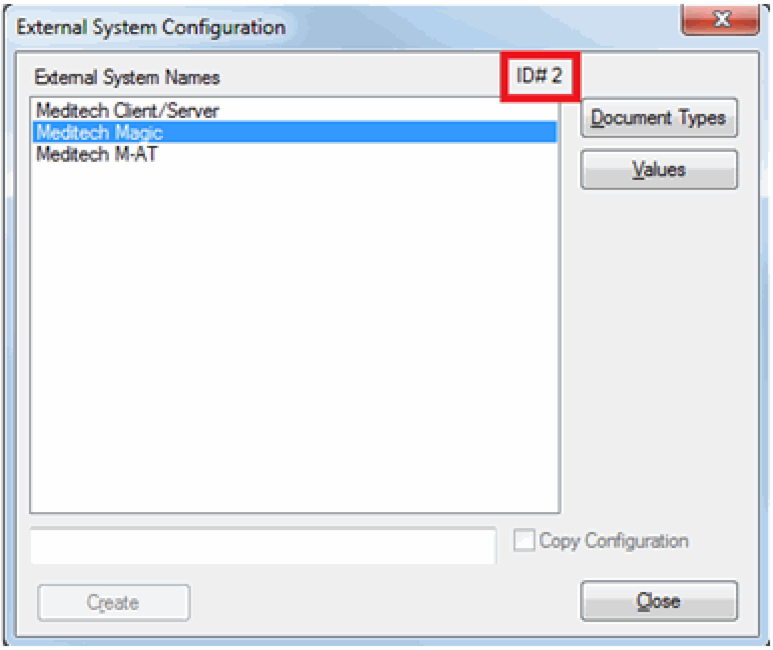
If you are upgrading from an OnBase 14 system or above, it is best to copy from an existing External System.

To copy an External System:

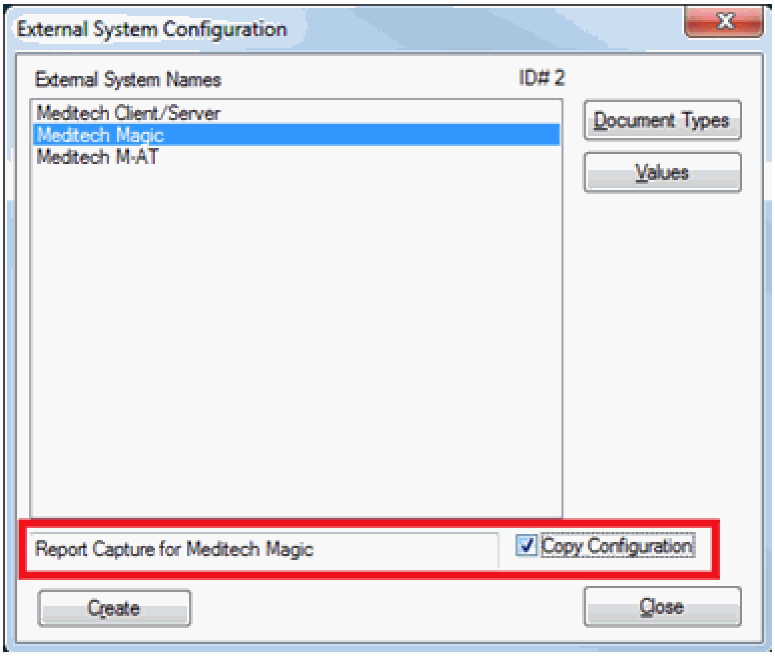
1. Open the OnBase Configuration Tool.
2. Select **Utils** | **External Systems**. The External System dialog box is displayed.



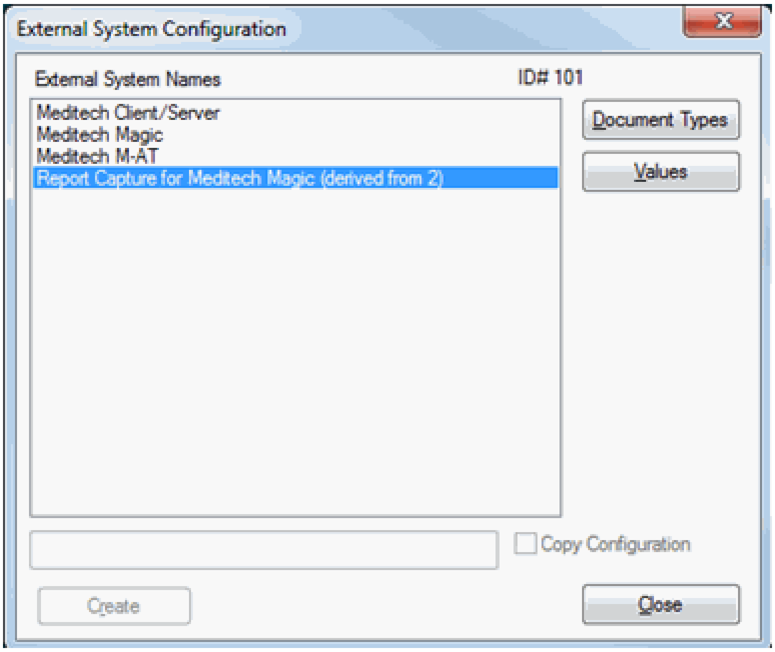
3. Select the **Meditech** or **Meditech Magic** external system with and ID# of 2.



4. Type the name of the new external system in the field provided.
5. Select the **Copy Configuration** check box.



6. Click **Create**. The External System you created is displayed in the list.

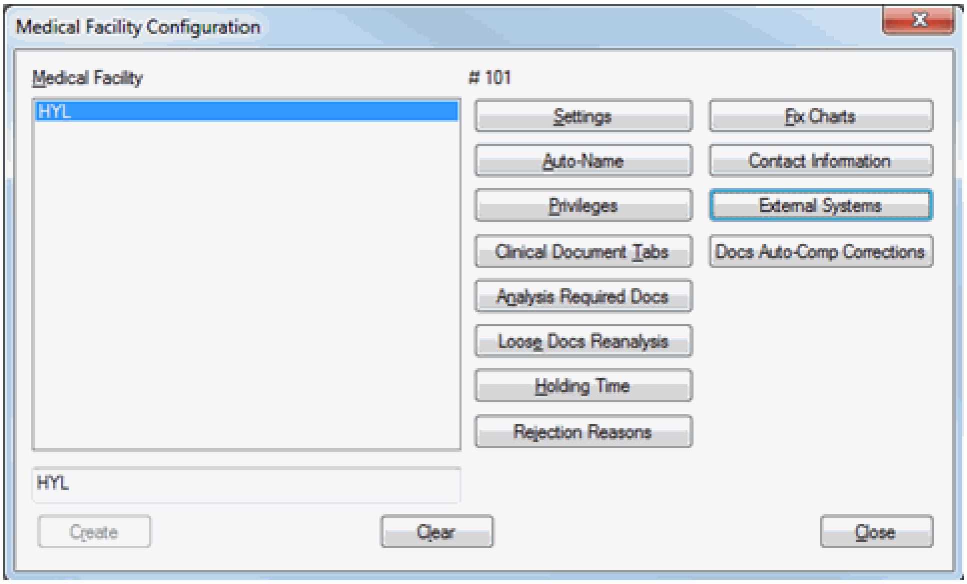


Replacing the Default External System with the New External System in Facility Configuration

Once you have created a new external system, you must access the Medical Facility configuration, remove the default Meditech external system, and then add the new external system to the list of selected Report Capture external systems.

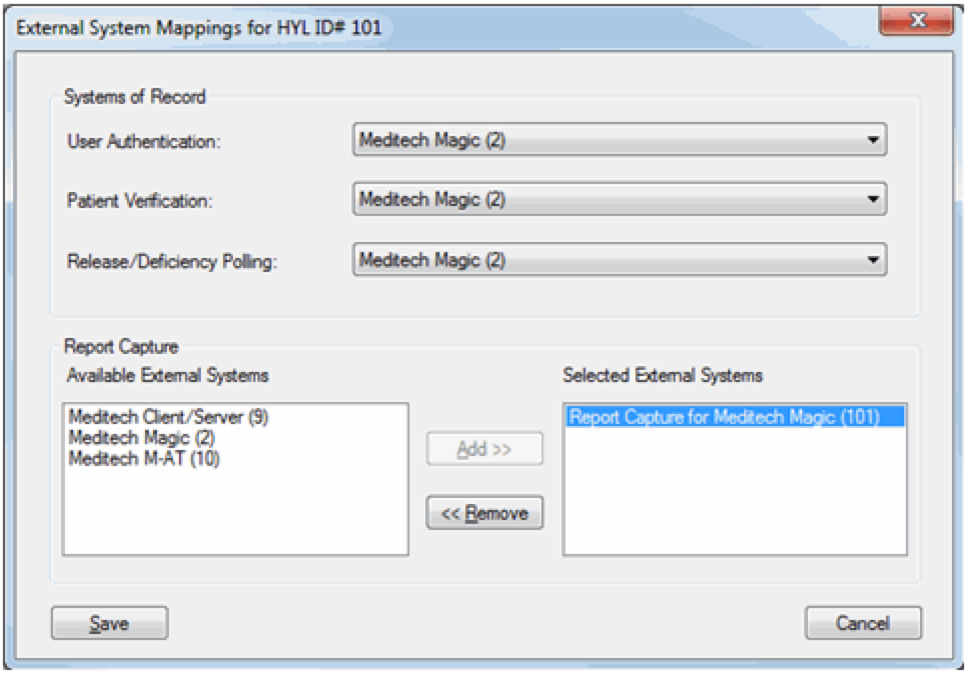
To replace the default external system with the new external system:

1. Open the OnBase Configuration Tool.
2. Select Medical | Facilities | Facility Configuration. The Medical Facility Configuration dialog box is displayed.



3. Select your Facility and then click **External Systems**.
4. From the External System Mappings dialog box, select the Meditech Magic (2) system from the **Selected External Systems** box, and then click **Remove** to remove it from the box.

5. Select the external system you created from the *Available External Systems* box, and then click **Add** to add it to the **Selected External Systems** box.



6. Click **Save**.

Updating the Report Capture Services Configuration

After you have replaced the external system for your facility, you need to change the location of the services to use the new external system.

To change the location of the services:

1. Navigate to the Report Capture installation directory. This typically resides in the following location: **c:\Program Files(x86)\Hyland\Report Capture**.
2. Open each XML-formatted .config file and replace the External System ID setting with the External System ID number of the new Meditech external system. In our case, this would look like the following:

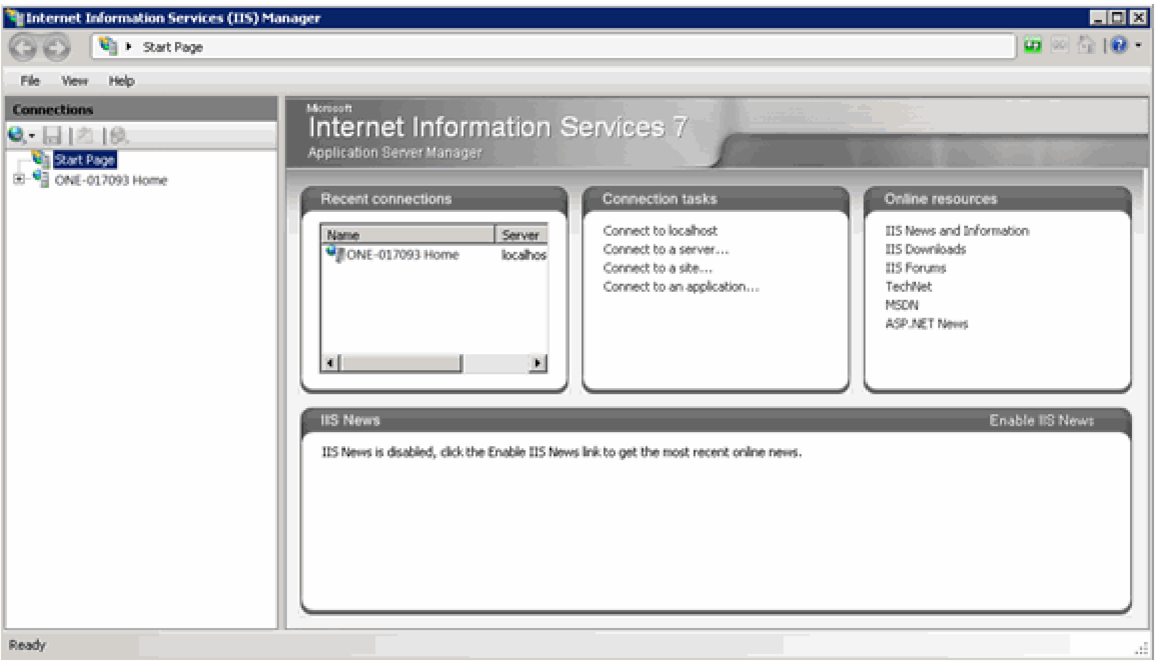
```
<setting name="ExternalSystemIDs" serializeAs="String">
    <value>101</value>
</setting>
```

Restarting the Internet Information Services Manager (IIS)

The IIS must be reset in order to apply the changes made to the system.

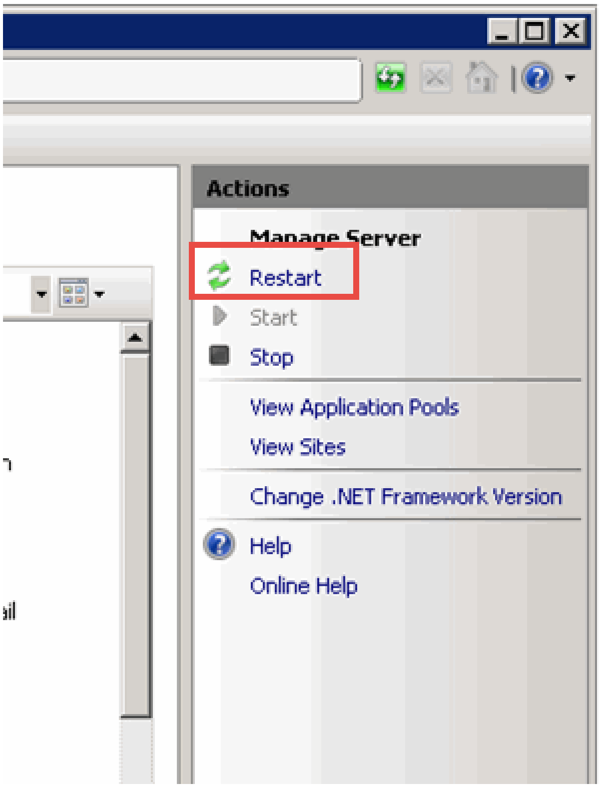
To reset the IIS:

1. Navigate to **Start | Control Panel | Administrative Tools | Internet Information Services (IIS) Manager**. The IIS Manager is displayed.



2. Select the root node in the **Connections** tree. It should be the name of the machine.

3. In the **Actions** panel on the right side of the screen, click **Restart**.



Configuring Facilities for Meditech Systems

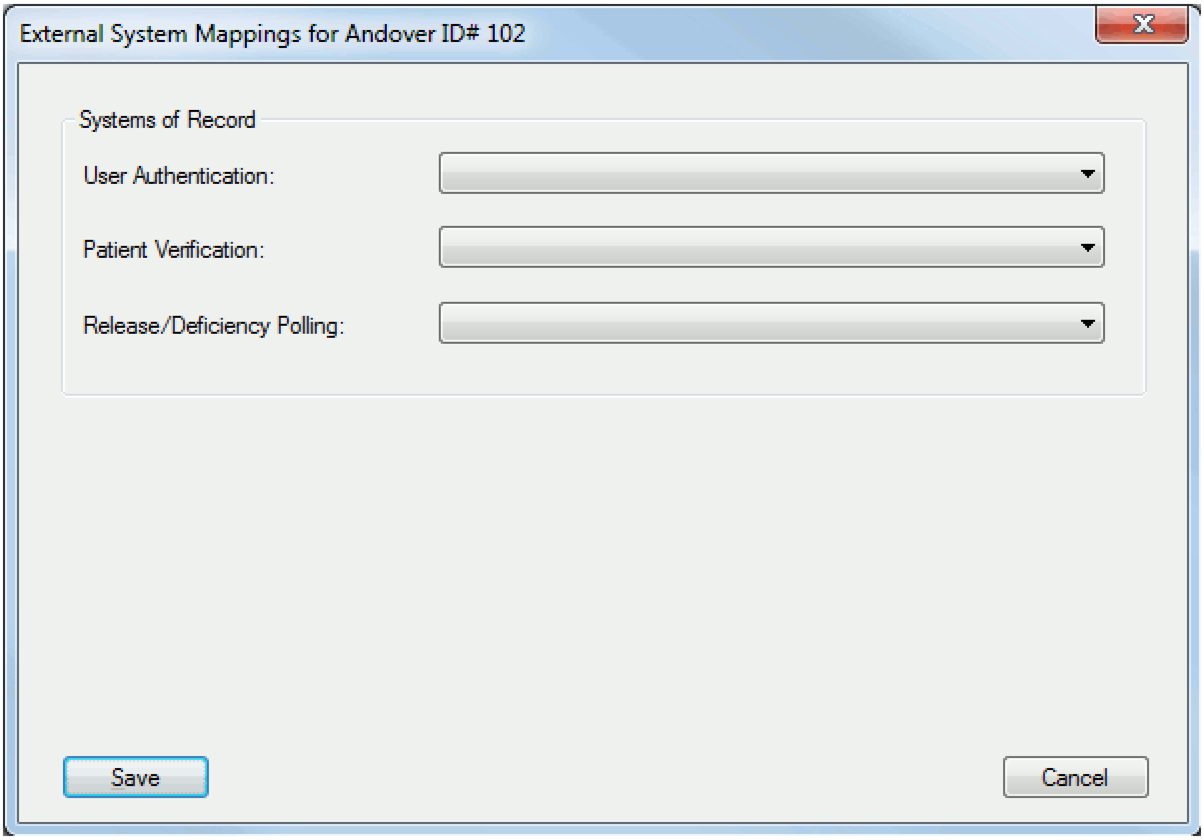
If your solution includes multiple Meditech systems, individual facilities can be configured to authorize to, validate against, and release to specific Meditech systems.

To configure facilities for Meditech systems, complete the following steps:

1. In the Configuration module, select **Medical | Facilities | Facility Configuration**.

Note: See the **HL7** module reference guide for more information on creating facilities.

2. Select a facility in the **Medical Facility** list, then click **External System**.
   The **External System Mapping for [Facility Name] ID# [Facility ID]** dialog box is displayed.



3. From the **User Authorization** drop-down select list, select the Meditech system this facility will authenticate against.
4. From the **Patient Verification** drop-down select list, select the Meditech system this facility will verify against.
5. From the **Release/Deficiency Polling** drop-down select list, select the Meditech system this facility will release to.

Note: Different Meditech systems can be selected for each option. Only Meditech systems that are configured in OnBase as external systems are available for selection.

6. Click **Save** to finish.

Configuring the OnBase for Meditech Viewer for a Specific Facility

You can configure the OnBase for Meditech Viewer to authenticate against a specific configured Meditech facility. To configure a specific facility for the Meditech Viewer:

1. Open the **t_viewerApp.exe.config** file. See Installing the OnBase for Meditech Viewer via the Setup Wizard on page 39 for more information about the default installation location of the Meditech Viewer.
2. Locate the **ExternalSystemInstanceID** setting. Set the value to the ID of the external system from which documents will be retrieved.
3. Locate the **AuthorizationFacility** setting. Set the value to the ID of the configured facility that the Meditech Viewer should authenticate against.

Note: If a facility is not specified, the OnBase for Meditech Viewer will use the default facility for both retrieval and authentication.

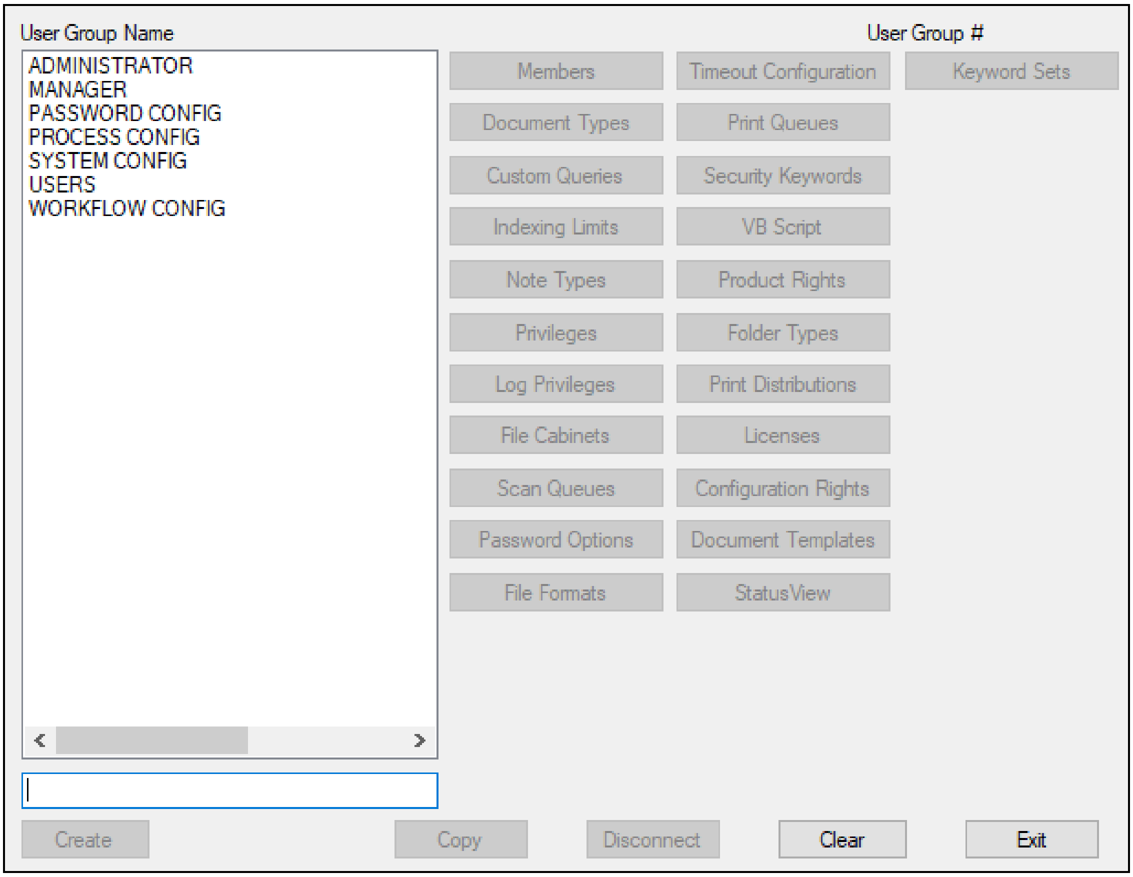
Authentication Methods

Your Meditech users can authenticate with OnBase using their own network credentials, or via a proxy user.

Users Authenticate Using Their Own Network Credentials

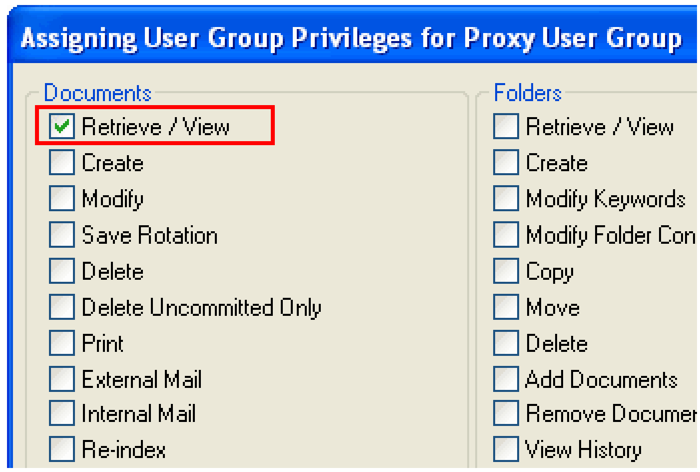
1. Create an **OnBase** Active Directory group in Windows.
2. Assign each user who will be accessing OnBase documents from Meditech to this group.
3. Log onto the OnBase Configuration module.

4. Click **Users | User Groups/Rights**. The **User Groups & Rights** dialog box is displayed.

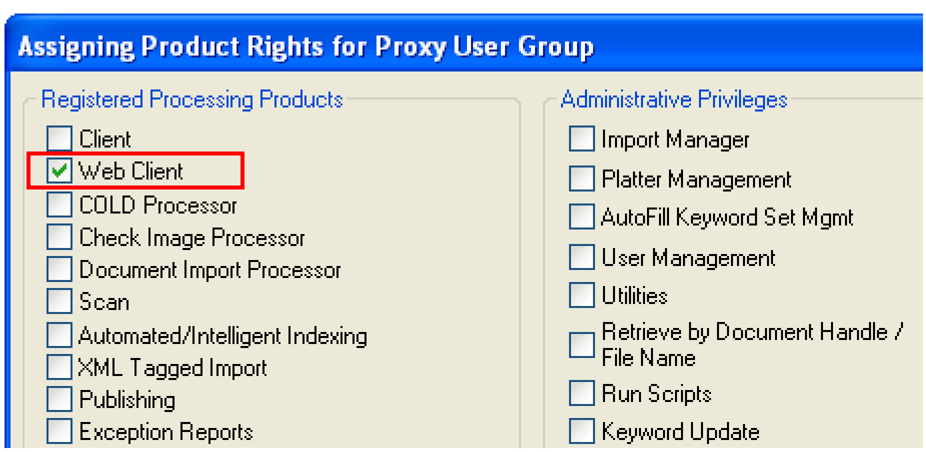


5. In the field below the **User Group Name** list, enter the name of your OnBase Active Directory group (i.e., **OnBase**).
6. Click **Create**. The **OnBase** User Group is created.
7. Click **Privileges**. The **Assigning User Group Privileges for <User Group Name> Group** dialog box is displayed.

8. In the **Documents** section, select the **Retrieve/View** check box. It should be the only check box selected in the **Assigning User Group Privileges for <User Group Name> Group** dialog box.

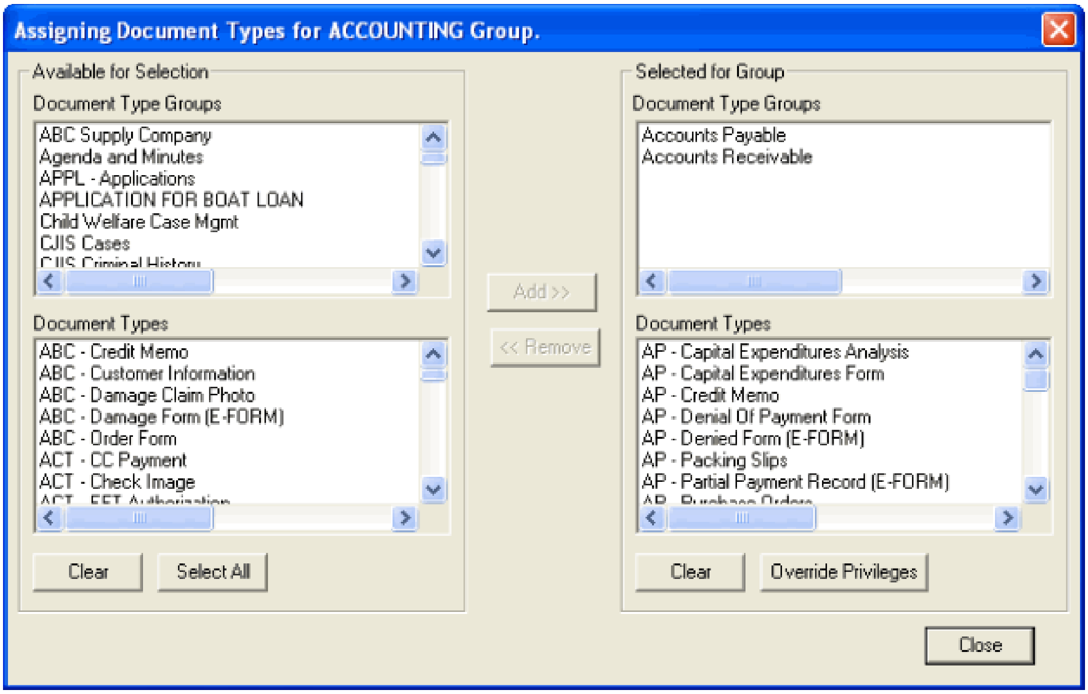


9. Click **Save**. The **Assigning User Group Privileges for <User Group Name> Group** dialog box is closed and you are returned to the **User Groups & Rights** dialog box.
10. Click **Product Rights**. The **Assigning Product Rights for <User Group Name> Group** dialog box is displayed.
11. In the **Registered Processing Products** section, select the **Web Client** check box. It should be the only check box selected in the **Assigning Product Rights for <User Group Name> Group** dialog box.



12. Click **Save**. The **Assigning Product Rights for <User Group Name> Group** dialog box is closed and you are returned to the **User Groups & Rights** dialog box.

13. Click **Document Types**. The **Assigning Document Types for <User Group Name> Group** dialog box is displayed.



14. From the **Available for Selection** section, select all of the Document Type Groups and/or Document Types that you want users to have access to from Meditech and click **Add>>**.

    The selected Document Type Groups and/or Document Types are moved to the **Selected for Group** section.
15. Click **Close**. The **Assigning Document Types for <User Group Name> Group** is closed and you are returned to the **User Groups & Rights** dialog box.
16. Click **Exit** to return to the OnBase Configuration module.
17. The first time users belonging to the **OnBase** Active Directory group log on to OnBase using their network credentials, their OnBase user accounts will be created and assigned to the **OnBase** User Group.

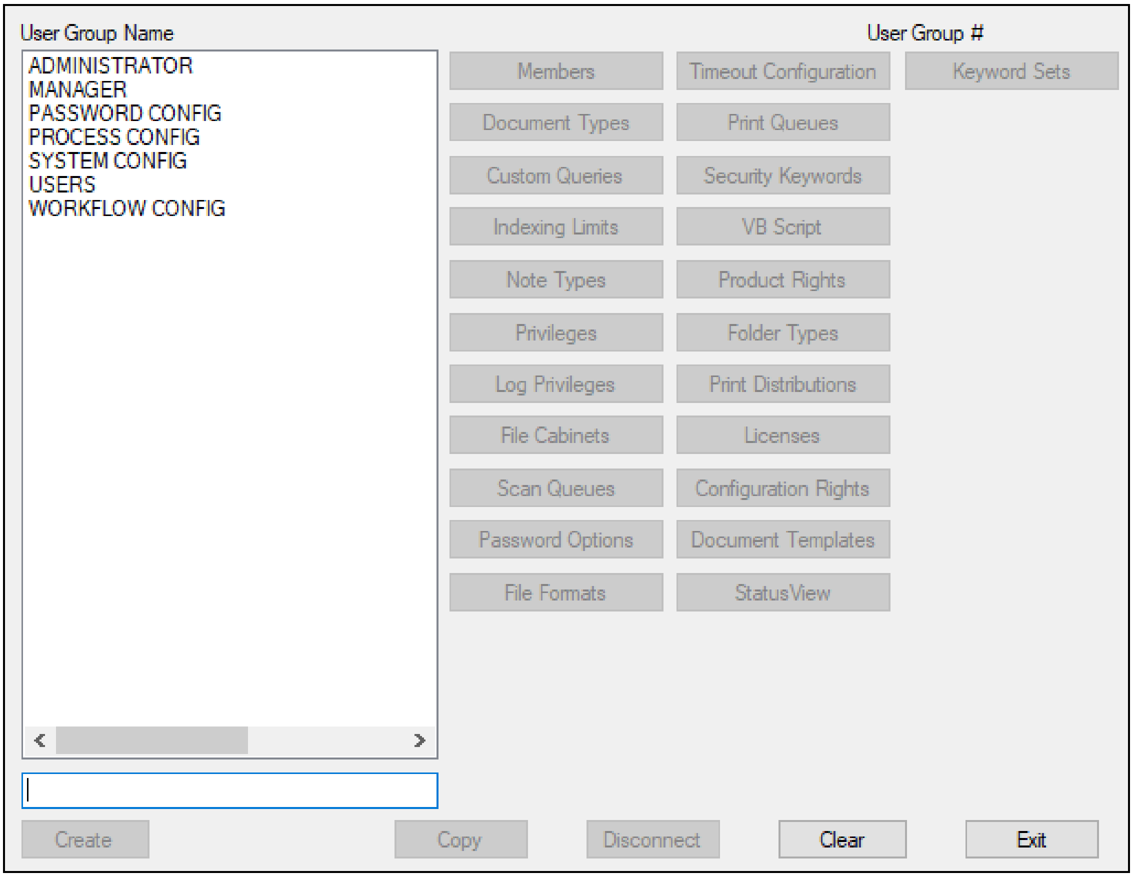
Users Authenticate via a Proxy User

1. Create an **OnBase** Active Directory group in Windows.
2. Create a proxy user account and assign it to this group.

Caution: Do not configure your proxy user account as an OnBase Service Account.

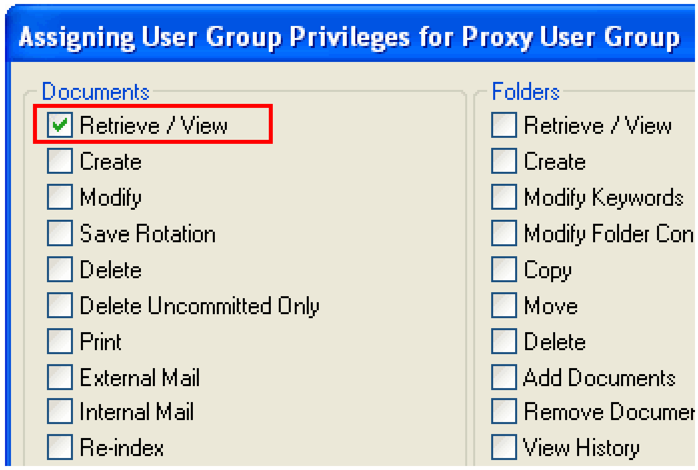
3. Log onto the OnBase Configuration module.

4. Click **Users | User Groups/Rights**. The **User Groups & Rights** dialog box is displayed.

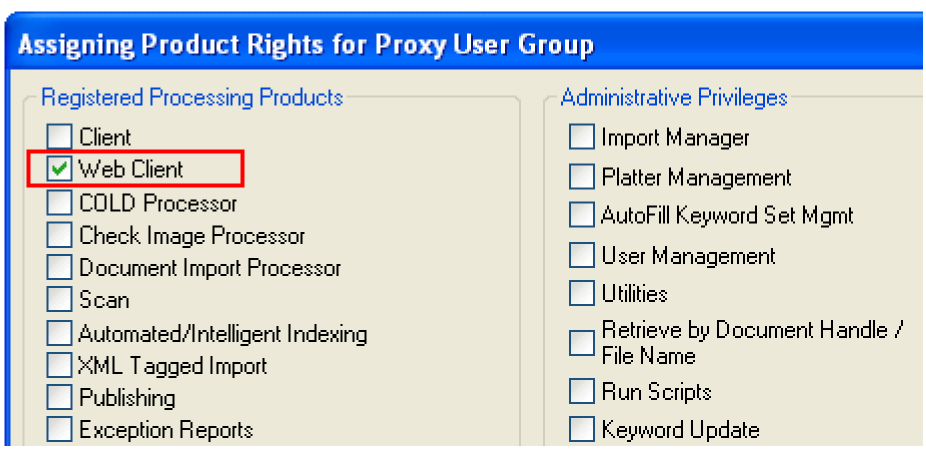


5. In the field below the **User Group Name** list, enter the name of your OnBase Active Directory group (i.e., **OnBase**).
6. Click **Create**. The **OnBase** User Group is created.
7. Click **Privileges**. The **Assigning User Group Privileges for <User Group Name> Group** dialog box is displayed.

8. In the **Documents** section, select the **Retrieve/View** check box. It should be the only check box selected in the **Assigning User Group Privileges for <User Group Name> Group** dialog box.

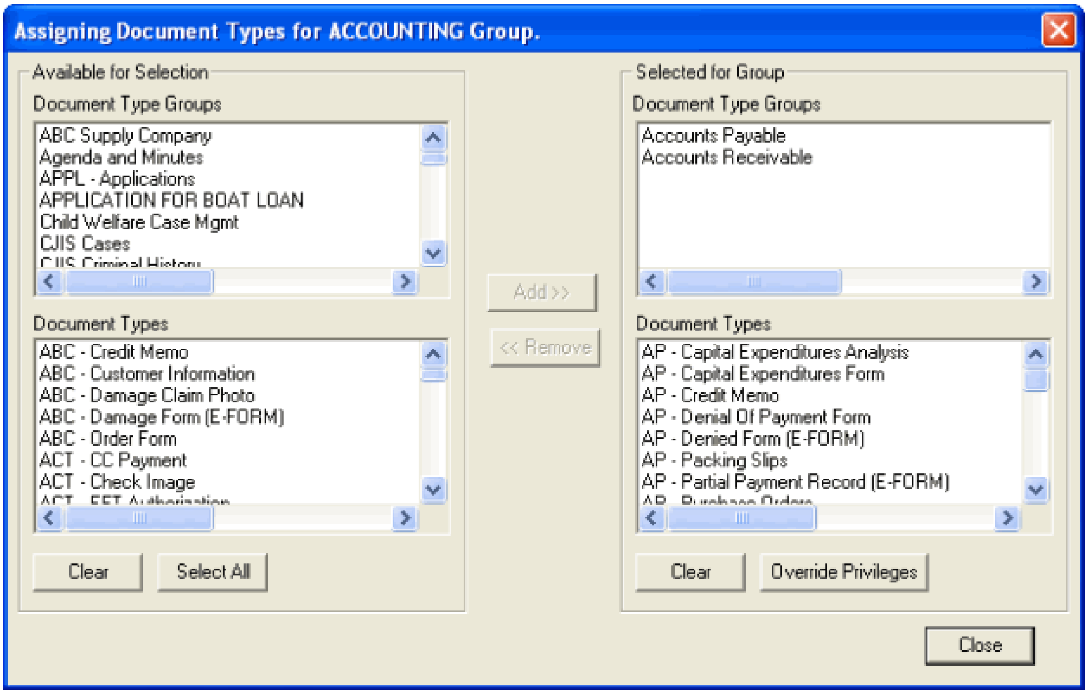


9. Click **Save**. The **Assigning User Group Privileges for <User Group Name> Group** dialog box is closed and you are returned to the **User Groups & Rights** dialog box.
10. Click **Product Rights**. The **Assigning Product Rights for <User Group Name> Group** dialog box is displayed.
11. In the **Registered Processing Products** section, select the **Web Client** check box. It should be the only check box selected in the **Assigning Product Rights for <User Group Name> Group** dialog box.



12. Click **Save**. The **Assigning Product Rights for <User Group Name> Group** dialog box is closed and you are returned to the **User Groups & Rights** dialog box.

13. Click **Document Types**. The **Assigning Document Types for <User Group Name> Group** dialog box is displayed.



14. From the **Available for Selection** section, select all of the Document Type Groups and/or Document Types that you want users to have access to from Meditech and click **Add>>**.

    The selected Document Type Groups and/or Document Types are moved to the **Selected for Group** section.
15. Click **Close**. The **Assigning Document Types for <User Group Name> Group** is closed and you are returned to the **User Groups & Rights** dialog box.
16. Click **Exit** to return to the OnBase Configuration module.

Once the proxy user has been created, assigned to an Active Directory group, and the Active Directory group has been assigned to an OnBase User Group, you must configure the OnBase for Meditech Viewer to use these proxy user's credentials to authenticate to OnBase instead of attempting to use the user's credentials to authenticate.

For more information, see Configuring DocPop on page 142.

Users Authenticate Based on IP

You can configure the OnBase for Meditech Viewer to authenticate into OnBase using your Meditech user name and either your workstation's IP address or machine name. This type of authentication eliminates the need for users to manually authenticate multiple times (i.e., when logging on to the Meditech system, launching the OnBase for Meditech Viewer, viewing a document, etc.) and provides a proper audit history within OnBase for users who access the Meditech system from shared workstations or kiosks.

To configure IP-based authentication:

1. Open the **t_viewerApp.exe.config** file using a text editor such as Notepad.
2. Within the **CommParams** element, add the **WorkstationType** setting. This setting controls whether IP-based authentication is enabled.
3. Set the **WorkstationType** setting to **shared**. For example:
   ```
   <add key="WorkstationType" value="shared" />
   ```
4. Save and close the configuration file.

Note: This setting requires that your OnBase for Meditech Viewer is not configured for Active Directory authentication (i.e., the **ntsecurity** setting in the **CommParams** element is set to **false**).

Note: The IP address or machine name to be used for authentication must be added to your Meditech system.

OnBase for Meditech with ODA

User Guide

Foundation EP5

Storing Meditech Archive Reports in OnBase

The **Hyland Multiserver** makes it possible to store Meditech archive reports in OnBase. If your Meditech solution is configured to create archive reports, these reports will be automatically stored in OnBase based on the report's **RetrievalID** value. As with other documents stored in OnBase, these archive reports can be retrieved and viewed from within Meditech as needed.

Note: Meditech archive reports are encrypted. While they can be stored in OnBase, they can be viewed only within Meditech.

Viewing OnBase Documents from Meditech

The following section is a guide to using the viewer that displays documents retrieved through Meditech.

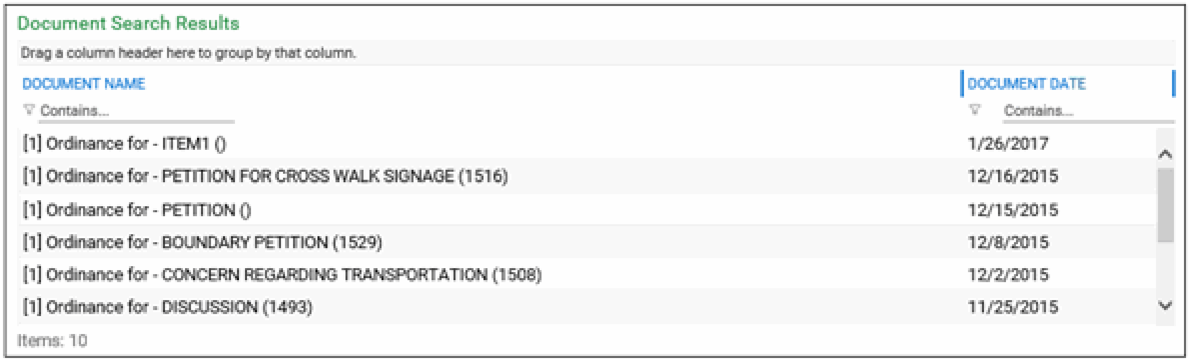
The following topics illustrate and describe how to use the ActiveX document viewer. Feature availability depends on your user privileges and the type of viewer you are using. Not all features are available for all users.

Document Search Results List

The Document Search Results list is a list of all documents that meet the search criteria in any of the following searches or contexts:

- Document Type
- Document Date
- Keyword Value
- Note
- Folder
- Envelope
- Custom Query

Each item in a Document Search Results list identifies the Auto-Name assigned to the document. How documents are named varies between Document Types. The following example illustrates the appearance of a Document Search Results list.



You can change the height of the Document Search Results list by clicking and dragging the blue bar at the bottom of the Document Search Results list. If your system is configured to save the Document Search Results list height, the new height of the Document Search Results list will be saved as the default and will automatically open to that height the next time you execute a Document Search.

If the document names have been configured to use font attributes such as bold, italics and color, these attributes are visible in the Document Search Results list.

Note: The number of documents found in the search is displayed at the bottom of the list. If the search returns more documents than allowed by your system administrator, the document counter does not increase past the maximum and a message is displayed stating the following: **Results were limited, please refine your search.**

Filtering Documents in the Search Results List

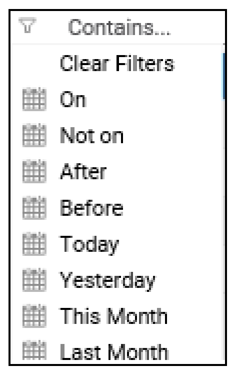
You can filter documents in the Document Search Results list by either Document Date or Document Name. If the Document Search Results list displays more than 1000 results, you can use the advanced filtering mode to filter the list.

Filter Documents by Document Date

To filter documents by Document Date in the Search Results list:

1. From the **Document Date** column, click the filter icon.

The filter options drop-down list is displayed.



2. Select a filter option from the list. Options include:

Option	Description
On	Filters documents on a specific date. Enter the date in the Contains field.
Not on	Filters documents that are not on a specific date. Enter the date in the Contains field that is not to be included in the filter.
After	Filters documents after a specified date. Enter the date in the Contains field.
Before	Filters documents prior to a specified date. Enter the date in the Contains field.
Today	Filters documents based on today's date. Today's date is automatically entered in the Contains field.
Yesterday	Filters documents based on yesterday's date. Yesterday's date is automatically entered in the Contains field.
This Month	Filters documents that were created in the current month.
Last Month	Filters documents that were created in the prior month.
Clear Filters	Clears any filters that were applied to the Document Date column.

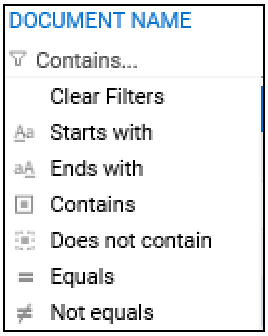
3. Enter a search term in the field next to the filter option icon and press **Enter**. The Search Results list displays the results of the filter.

Filter Documents by Document Name

To filter documents by Document Name in the Search Results list:

1. From the **Document Name** column, click the filter icon.

The filter options drop-down list is displayed.



2. Select a filter option from the list. Options include:

Option	Description
Starts with	Filters documents based on the letter or letters they start with. Enter the letters to filter in the Contains field.
Ends with	Filters documents based on the letter or letter they end with. Enter the letters to filter in the Contains field.
Contains	Filters documents based on the word or words contained within the document name. Enter the words to filter in the Contains field.
Does not contain	Filters documents based on the word or words that are not contained within the document name. Enter the words to filter in the Contains field.
Equals	Filters documents based exactly on the word or words entered in the Contains field.
Not equals	Filters documents according to a word or words that are not contained in the document name.
Clear Filters	Clears any filters that were applied to the Document Name column.

3. Enter a search term in the field next to the filter option icon and press **Enter**. The Search Results list displays the results of the filter.

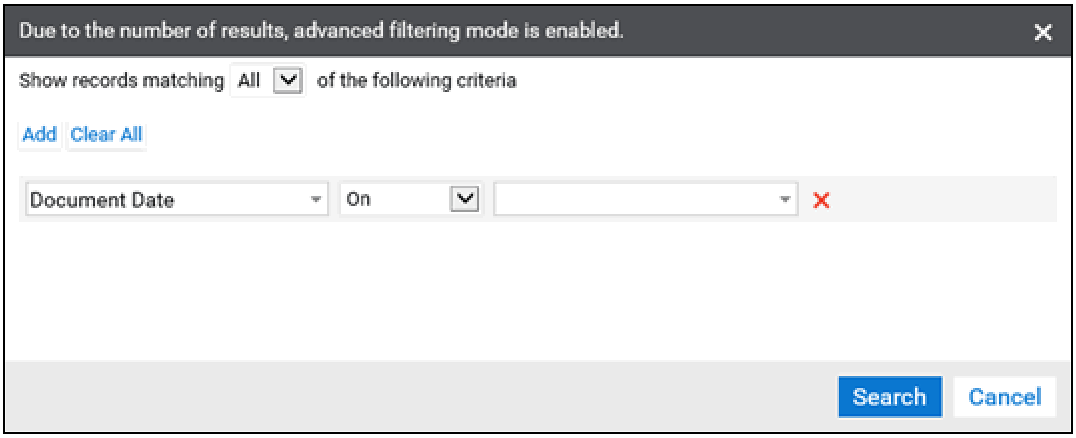
Filter Documents with Advanced Filtering Mode

If a Search Results list displays more than 1000 results, you must use the advanced filtering mode to filter the documents in the list.

To use the advanced filtering mode in the Search Results list:

1. From a column header in a Search Results list displaying more than 1000 results, click the filter icon.

The advanced filtering mode dialog box is displayed.



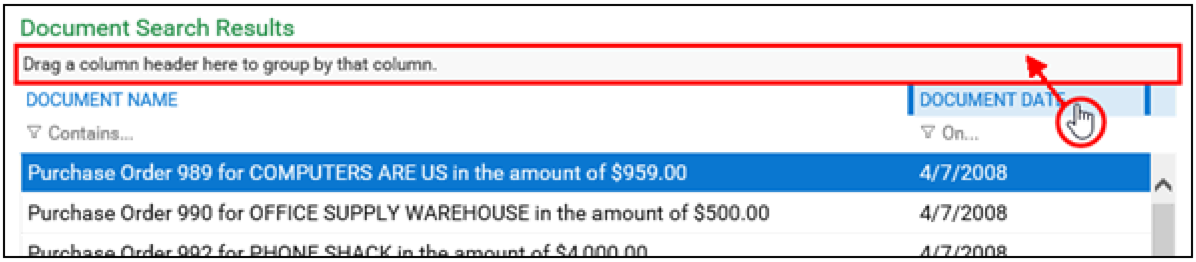
2. Select whether to show records matching **All** or **Any** of the criteria set in this dialog box.
3. Define each line of filter criteria using the provided fields:
   a. Select a column name to search within that column.
   b. Select a filter option to define how to filter the selected column.
   c. Enter or select a value to search for in the selected column.
4. To include additional criteria in the filter, click **Add**. A new line of fields is added to the list of criteria.
5. To remove criteria from the filter, click the **X** icon on each line, or click **Clear All** to remove all criteria.
6. When you have defined all of the criteria for the filter, click **Search**. The advanced filtering mode dialog box is closed, and the Search Results list displays the results of the filter.

Grouping Columns in the Document Search Results List

You can group items in the Document Search Results list by dragging column headers such as **Document Date** or **Document Name** to the space above the list. For example, documents in the list can be grouped according to the specific date a document was created, or by the name of documents.

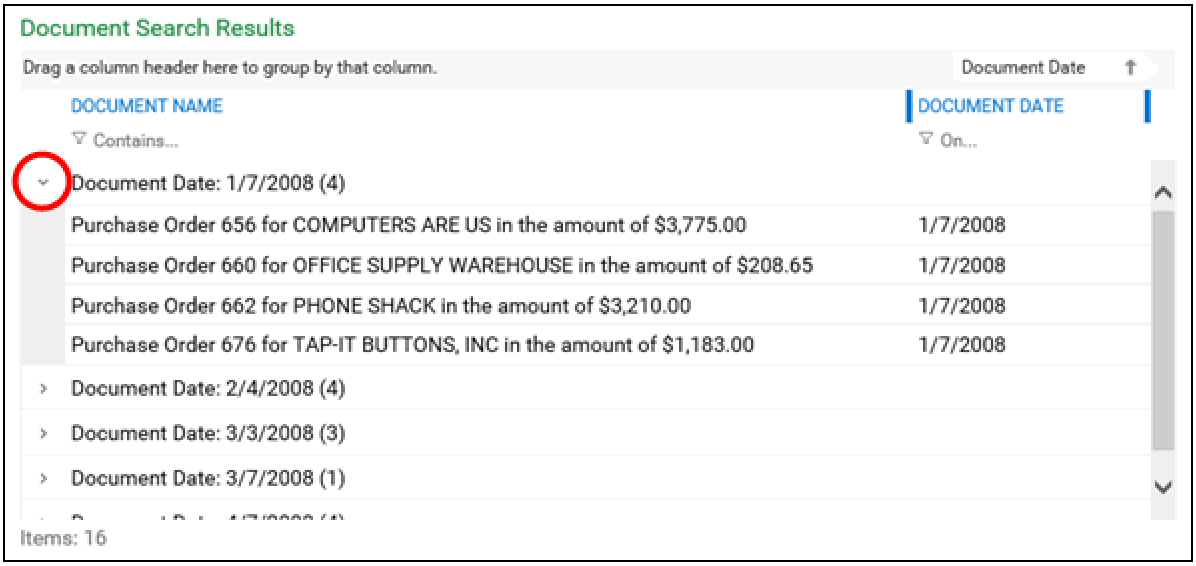
To group documents:

1. Click and hold a column header in the Document Search Results list.
2. Drag the column header to the grouping space at the top of the Search Results list, and then release the mouse button.

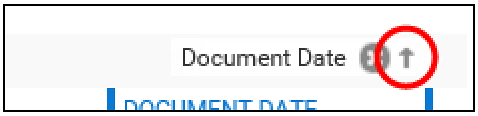


The items in the Search Results list are grouped according to the column header. By default, the document groups are collapsed.

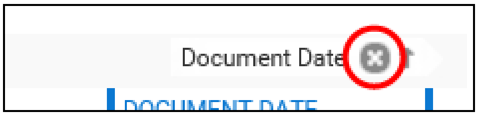
3. Click the arrow next to a group to expand it and display the documents in that group.



4. To sort the order of the groups displayed in the list, click the up or down arrow icon next to the column header in the grouping space.



5. To stop grouping documents by a column header, click the **Remove Grouped Column** icon next to the column header in the grouping space.



Viewing Documents

Open a document by double-clicking its name or, for text-based searches, by clicking the page number. The document is displayed in the Document Viewer.

You can also select multiple documents from this list and right-click to access options.

Note: If you have multiple documents selected but do not have consistent privileges for the corresponding Document Types, only the options you can apply to all selected documents are available. The unavailable options are grayed out.

Previewing Documents in the Thumbnail Viewer

The thumbnail viewer lets you quickly preview multiple text or image documents from the Document Search Results list by displaying thumbnails of the first page of each document. When you find the document you want, you can open the document by clicking its thumbnail.

Note: The thumbnail viewer may not be available, depending on your system's setup.

To preview documents in the thumbnail viewer:

1. From the Document Search Results list, select the documents that you want to preview. You can hold **Ctrl** and click to select multiple individual documents, or you can hold **Shift** and click to select a range of documents between the first and last document you click.
2. Right-click within the list and select **View Thumbnails**. The thumbnail viewer displays the thumbnails and Auto-Names of the selected documents.

Note: If **No Image Available** is displayed instead of a thumbnail, then the document's file format does not allow it to be represented as an image. The thumbnail viewer cannot display thumbnails of OLE document or video and media documents.

3. To open a document, click its thumbnail. The document is opened in a new window.

Printing Thumbnails in the Thumbnail Viewer

If you have sufficient rights, you can print the thumbnails displayed in the thumbnail viewer.

To print the displayed thumbnails in the viewer, press **Ctrl + P**. Your browser's print dialog box is displayed. Choose your preferences and print the page.

Changing Thumbnail Viewer Options

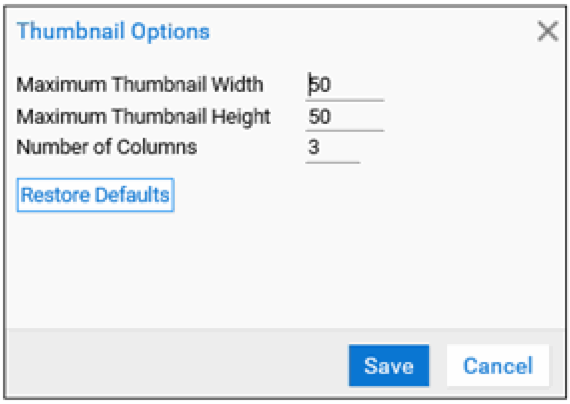
If the thumbnail viewer allows customization, you can configure how thumbnails are displayed. The thumbnail viewer lets you change the thumbnail size, the preview size (if applicable), and the number of columns displayed.

Note: If the **Thumbnail Options** button is unavailable in the thumbnail viewer, then customization has been disabled. If you are having trouble previewing documents and the **Thumbnail Options** button is unavailable, ask your system administrator to adjust the viewer's display settings.

To configure the thumbnail viewer options:

1. From the thumbnail viewer, click the **Thumbnail Options** button.

The **Thumbnail Options** dialog box displays the viewer options and their current values.



2. Adjust the values as needed. Options are described in the following table:

Option	Description
Maximum Thumbnail Width	In pixels, type the maximum width for thumbnails. For example, if you type **50**, thumbnails will never be wider than 50 pixels. Valid values range from **20** through **500**. **Note:** This setting is not used by documents that have thumbnail image renditions available. For faster loading, the thumbnail viewer displays these renditions without resizing them. Thumbnail image renditions are created by Document Import Processes and scan queues that have the **Create Image Thumbnails On Commit** option enabled.
Maximum Thumbnail Height	In pixels, type the maximum height for thumbnails. For example, if you type **50**, thumbnails will never be taller than 50 pixels. Valid values range from **20** through **500**. **Note:** This setting is not used by documents that have thumbnail image renditions available. For faster loading, the thumbnail viewer displays these renditions without resizing them. Thumbnail image renditions are created by Document Import Processes and scan queues that have the **Create Image Thumbnails On Commit** option enabled.
Number of Columns	Type the maximum number of columns you want the thumbnail viewer to use when displaying thumbnails. Valid values range from **1** through **7**.

3. Click **Save** to save your changes and close the dialog box.

Restoring Default Thumbnail Viewer Options

To restore the thumbnail viewer options to their default values, in the **Thumbnail Options** dialog box, click the **Restore Defaults** button.

Open in New Window

You can view multiple documents at the same time using the **Open in New Window** right-click option.

To open documents in a new window:

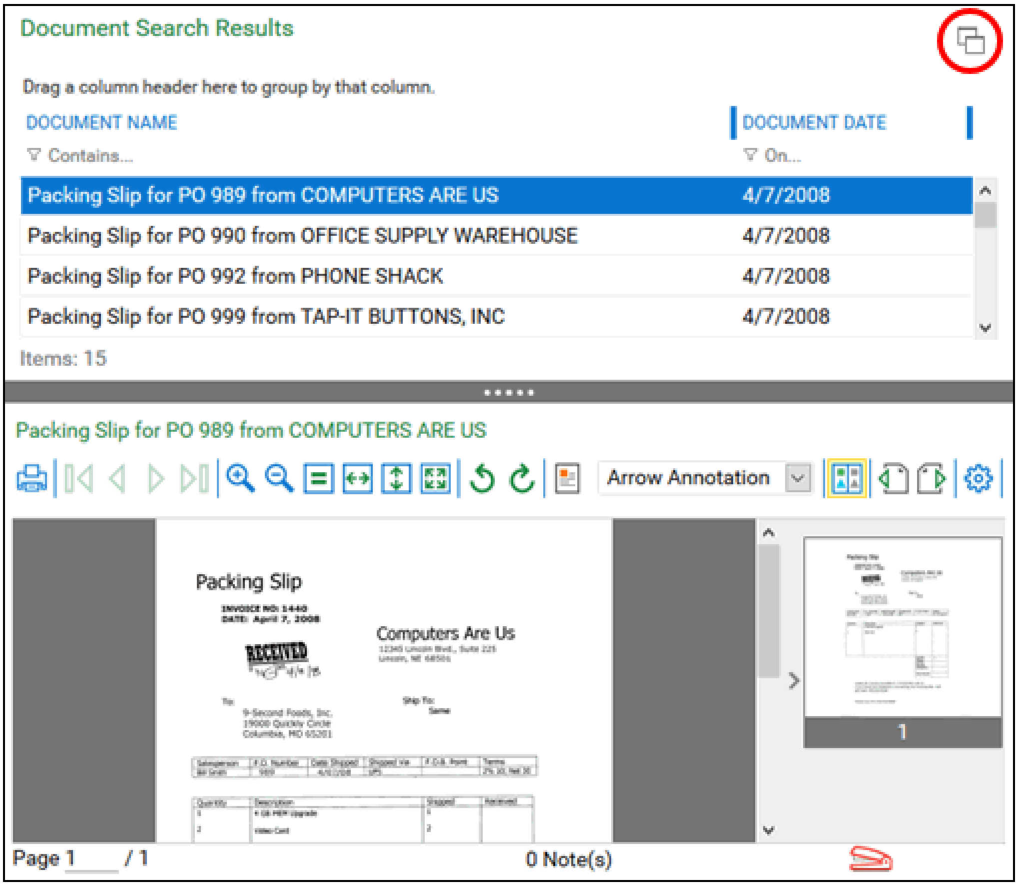
1. Select up to five documents from the Document Search Results list.
2. Right-click and select **Open in New Window** from the options menu. The selected documents are opened in separate windows.

Note: You cannot view documents retrieved from a text-based search in multiple windows; they must be viewed one at a time.

Open in New Window by Default

You can configure the Document Search Results list to always open documents in a new window, instead of opening in the Document Viewer below the list.

To always open documents in a new window, click the **Open in New Window** toggle button in the results list pane.



The Document Viewer is removed, and the button icon changes to indicate the setting is enabled. When you open a document from the list, it will be opened in a new window.

Document Search Results

Drag a column header here to group by that column.

DOCUMENT NAME	DOCUMENT DATE
Contains...	On...
Packing Slip for PO 989 from COMPUTERS ARE US	4/7/2008
Packing Slip for PO 990 from OFFICE SUPPLY WAREHOUSE	4/7/2008
Packing Slip for PO 992 from PHONE SHACK	4/7/2008
Packing Slip for PO 999 from TAP-IT BUTTONS, INC	4/7/2008
Packing Slip for PO 888 from PHONE SHACK	3/3/2008
Packing Slip for PO 898 from TAP-IT BUTTONS, INC	3/3/2008
Packing Slip for PO 881 from COMPUTERS ARE US	3/3/2008
Packing Slip for PO 885 from OFFICE SUPPLY WAREHOUSE	3/3/2008
Packing Slip for PO 765 from COMPUTERS ARE US	2/4/2008
Packing Slip for PO 767 from OFFICE SUPPLY WAREHOUSE	2/4/2008
Packing Slip for PO 779 from PHONE SHACK	2/4/2008
Packing Slip for PO 797 from TAP-IT BUTTONS, INC	2/4/2008
Packing Slip for PO 660 from OFFICE SUPPLY WAREHOUSE	1/7/2008
Packing Slip for PO 662 from PHONE SHACK	1/7/2008
Packing Slip for PO 676 from TAP-IT BUTTONS, INC	1/7/2008

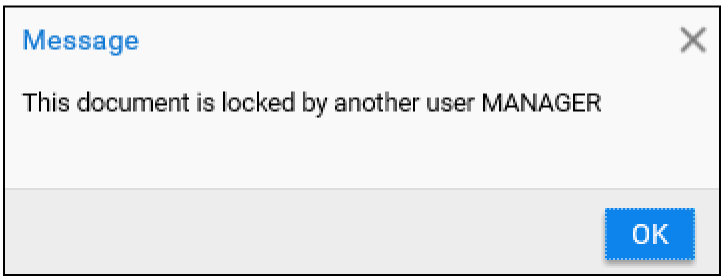
Items: 15

Click the **Open in New Window** button again to toggle back to opening documents in the Document Viewer. The button icon changes back to indicate the setting is disabled.

Viewing Documents

When you open a document, it is displayed in the Document Viewer. Depending on the Document Type and your User Groups and Rights, you might see different toolbars, icons and other graphics that indicate the presence of notes or annotations.

If a document is open by another user in a different session, the following message is displayed:



While you are able to view the document, you cannot do the following:

- Re-index the document
- Save the rotation of an HTML image

Document Viewer

Note the following when working in the Document Viewer:

- The Document Viewer toolbar provides a variety of options for viewing or changing the document as well as navigation features. See Toolbars in the Web Client on page 109.
- From an open document, right click to receive a list of possible Document Options.
- There are a number of shortcut key combinations that can help you navigate from page to page within a multi-page document, and from place to place within a page. See Document Viewer Shortcuts on page 139.

Documents generated by external applications, such as Microsoft Office and PDF documents, that are stored in their native formats may open externally in their native applications, or they may open within the browser window using viewers based on those applications. See the application help for information on these types of documents and their options.

PDF Viewers

PDF documents may be displayed in the Web Client using either the web browser's configured PDF viewer (typically a built-in viewer or browser extension) or the Web Client PDF viewer. The Web Client PDF viewer allows you to use standard Document Viewer toolbar and right-click functionality, such as applying notes and annotations to specific positions. The type of PDF viewer used in the Web Client is determined by your system administrator.

Document Viewer Shortcuts

The following keyboard shortcuts can be used when viewing documents:

Navigating Documents

The following keyboard functions allow you to navigate a document.

Shortcut	Action
Page Up	Quickly scrolls up the current page.
Page Down	Quickly scrolls down the current page.
Up Arrow	Slowly scrolls position on the current page up.
Down Arrow	Slowly scrolls position on the current page down.
Right Arrow	Slowly scrolls position on the current page right.
Left Arrow	Slowly scrolls position on the current page left.
Ctrl + Page Up	Navigates to the top of the previous page.
Ctrl + Page Down	Navigates to the top of the next page.
Home	Navigates to the top of the current page.
End	Navigates to the bottom of the current page.
Ctrl + Home	Navigates to the top of the first page. **Note:** This function is not supported in the ActiveX Web Client.
Ctrl + End	Navigates to the top of the last page.
Ctrl + Up Arrow	Quickly scrolls up the current page.
Ctrl + Down Arrow	Quickly scrolls down the current page.
Ctrl + Right Arrow	Quickly scrolls position on the current page right.
Ctrl + Left Arrow	Quickly scrolls position on the current page left.

Zooming In and Out

The following keyboard functions allow you to zoom in and out while viewing a document.

Shortcut	Action
+ (on numeric keypad)	Zooms in.
- (on numeric keypad)	Zooms out.
Ctrl + mouse wheel	Zooms in and out.

Searching for Internal Text

The following keyboard shortcuts are available for the Internal Text Search toolbar when the cursor is in the **Search String** field. These shortcuts are not available if you are using the **Find Next** and **Find Previous** buttons.

Shortcut	Action
Enter	Starts the search or finds the next instance of the text if the search is in progress.
Shift + Enter	Finds the previous instance of the text.

Viewing Previous or Next Documents

From an open document, the following keyboard shortcuts allow you to view the previous and next documents in a document results list.

Shortcut	Action
Ctrl + F6	Displays the previous document in a document results list.
Ctrl + F7	Displays the next document in a document results list.

Note: Shortcut keys do not work when the cursor is positioned over a thumbnail and Thumbnail Zoom is enabled.

Navigate

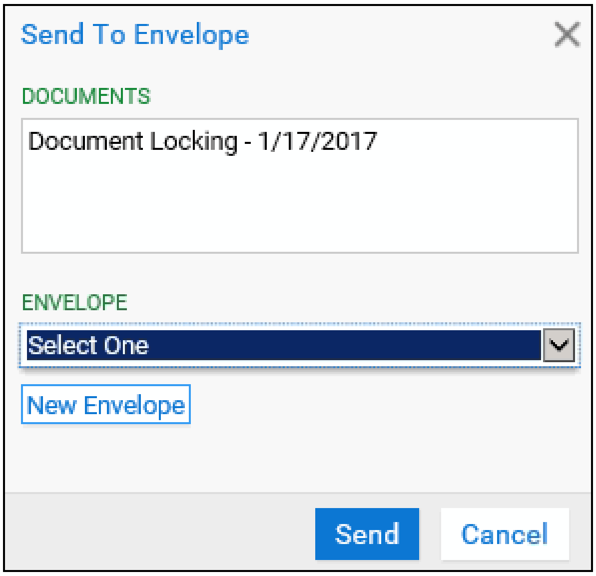
Navigate is a feature available for multi-page text and image documents. You can access the **Navigate** options by right-clicking anywhere in the open document and selecting **Navigate**.

Option	Description
First Page **Last Page**	Selecting **First Page** or **Last Page** immediately displays the first or last page in the document, respectively.
Next Page **Previous Page**	Select **Next Page** or **Previous Page** to display subsequent or preceding pages in the document, respectively.
Go To Page	Select **Go To Page** and type the page number of the page you want to display. **Note:** You can also access the **Go To Page** dialog by double-clicking the **Page X of Y** section of the status bar.

Adding Documents to an Envelope

If you have the appropriate user rights, you can send one or more documents to an envelope for easy access. Documents in an envelope do not have to have any elements in common.

1. From an open document, or from one or more documents selected from a Document Search Results List, right-click and select **Send To | Envelope**. The **Send To Envelope** dialog box is displayed.



   The document or documents you selected are shown in the **Documents** list.
2. Select an envelope from the **Envelope** drop-down list.
3. To create a new envelope, click **New Envelope**. Enter the name for the new envelope and click **OK**. This creates the new envelope and returns you to the **Send To Envelope** dialog box, with the new envelope selected. If you typed the name of an existing envelope, no new envelope is created, and the document will be added to the existing envelope.
4. Click **Send**. The document is added to the selected envelope.

Process

There are several process options available when viewing documents.

1. From an open document, right-click and select **Process**.
2. Select one of the process options described in the following table:

Option	Description
Rotate All Pages 180	Rotates all pages of the document 180 degrees from their current positions. **Note:** This option is only available for image documents in the HTML Web Client.
Rotate Right	Rotates the image 90 degrees to the right.
Rotate Left	Rotates the image 90 degrees to the left.
Invert	Reverses the colors in the color palette. For example, black pixels become white and white pixels become black. A document is inverted only for the duration of its viewing session. When the document is closed, it resumes its default color properties. Selecting **Save Rotation** does not save the inverted document.
Flip Horizontally	Displays the document as a mirror image across the vertical axis.
Flip Vertically	Displays the document as a mirror image across the horizontal axis.

3. Right-click and select **Process | Save Rotation** to save the rotation. A confirmation message is displayed.

Note: Clicking **Save Rotation** saves each individual page of the document with any rotations that have been applied to it.

If you haven't selected the User Option **Rotate Auto-Save** in the OnBase Client or Web Client, and you don't select **Save Rotation**, the document retains the rotation for the current viewing session and resumes its default display properties upon closing. The document is displayed with its default properties the next time the document is opened.

Note: You can only save rotations on image documents.

Display

The Display feature can soften or increase the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-and-white images, making it helpful for reading scanned documents containing text that is too dark or too light.

The Display feature is set to **Scale to Gray** by default. To turn Scale to Gray off, do one of the following:

- Right-click the document and select **Display | Normal**.
- Click the  **Scale to Gray** button from the Viewer Control toolbar.

To turn Scale to Gray back on, do one of the following:

- Right-click the document and select **Display | Scale to Gray**.
- Click the **Scale to Gray** button again from the Viewer Control toolbar.

Send To Options

From an open document or from the Document Search Results list, right-click and choose **Send To** to display a sub-menu of document export options. The options available for any particular document depend on the Document Type, your network capabilities, which modules you are licensed to use, and the user rights granted to you by your system administrator.

Display Considerations

For documents sent outside of OnBase (**Send To | Clipboard**, **Mail Recipient**, or **File**):

- An overlay is displayed on the sent or saved document only if the overlay is displayed by default when you open the document in OnBase.
- Overlays are not displayed on documents sent with a content type of **Native Format**, **Original Format**, or **Text (.txt)**.
- Image document rotations are respected only if the rotation has been saved prior to sending.

From an Open Document

Note: Some documents, such as Microsoft Office documents, open using an external viewer. To access **Send To** options for a document that opens using an external viewer, right-click the document from a Document Search Results list.

The **Send To** right-click menu for an image or text document that is viewed within the Document Viewer may include the following options, depending on your system's configuration:

- **Send To | Clipboard**: Select to copy the document to the Windows clipboard.
- **Send To | Mail Recipient**: Select to email the document externally to a specified recipient.
- **Send To | Create New Document**: Select to create a new document from the current one, specifying Page Range, Document Type, Document Date, and Keyword Values as needed. Available for indexed documents only.

Note: Depending on your user rights, the new document may not contain masked Keyword Values from the original document. See the **Encrypted Alpha Keywords** module reference guide or help file for more information.

In the **Page range** field, type the pages (e.g., **1,5**) or range of pages (e.g., **1-5**) you want to copy to the new document. (This option is available for multi-page image documents only.)

- **Send To | File**: Select to save the document to a specified file.

Note: The ActiveX Web Client does not support the Windows protected mode. This could impact the location where you want to save files. See your system administrator for more information.

- **Send To | Envelope**: Select to include the document in an envelope.
- **Send To | Internal User**: Select to send the document to another user in OnBase.
- **Send To | Create DocPop Link**: Select to email a link to the document that can be accessed by recipients via DocPop.
- **Send To | Copy DocPopLink**: Select to copy a DocPop URL to the clipboard. You can browse to a new window and paste the link into the subject line to open the document in DocPop.
- **Send To | Create DocPop Link to Page**: Select to email a link to the document that will open the document to the page displayed in the viewer. The link allows the document to be accessed by recipients via DocPop. This option is only available for text and image documents.

From the Document Search Results List

The **Send To** right-click menu for a selected document in the Document Search Results list may include the following options, depending on your system's configuration:

- **Send To | Mail Recipient**: Select to email the document externally to a specified recipient.
- **Send To | File**: Select to save the document to a specified file.

Note: The ActiveX Web Client does not support the Windows protected mode. This could impact the location where you want to save files. See your system administrator for more information.

- **Send To | Create New Document**: Select to create a new document from the current one, specifying Page Range, Document Type, Document Date, and Keyword Values as needed. Available for indexed documents only.

Note: Depending on your user rights, the new document may not contain masked Keyword Values from the original document. See the **Encrypted Alpha Keywords** module reference guide or help file for more information.

In the **Page range** field, type the pages (e.g., **1,5**) or range of pages (e.g., **1-5**) you want to copy to the new document. (This option is available for multi-page image documents only.)

- **Send To | Internal User**: Select to send the document to another user in OnBase.
- **Send To | Envelope**: Select to include the selected document(s) in an envelope.
- **Send To | Folder**: Select to add the selected document(s) to a static folder.
- **Send To | Copy DocPopLink**: Select to copy a DocPop URL to the clipboard. You can browse to a new window and paste the link into the subject line to open the document in DocPop.

- **Send To | Create DocPop Link**: Select to email a link to the document that can be accessed by recipients via DocPop.

Note: For more information on DocPop, see the **DocPop** module reference guide.

Note: Depending on the file type of the selected document, not all of the following content types may be available. In addition, the names of some of the following options may differ between the ActiveX and HTML Web Client.

Option	Description
Original Format **or** **Native Format**	Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied. **Note:** For multi-page image documents, this option saves the document as a single-file TIFF file. **Note:** This content type is only available if the selected documents can be successfully saved or mailed in their original formats.
Rendered Format **or** **AutoDetect Format**	Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet

Option	Description
Encrypted PDF (.pdf)	Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay
Image (.tif)	Saves or sends the selected documents as TIFF files. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay **Note:** If a text document is configured to display an overlay by default, then the text document will be saved as an image with the overlay applied.
Text (.txt)	Saves or sends the selected documents in plain text format. Available for documents with a text report format. Overlays are not applied.
HTML (.htm;.html)	Saves or sends the selected documents in .htm format. Available for documents using HTML and MHTML (for example, E-Forms, V-Forms).
ZIP (.zip)	Saves or sends the selected documents as a ZIP file. Available for any document or group of documents.

Emailing Documents

There are two ways to email documents that you have retrieved:

- From the Document Search Results list, you can email one or more documents.
- From an open document, you can send the open document to an email recipient.

Note: If you are sending an email through the Web Client using Microsoft Outlook, ensure that Outlook is open before attempting to send your email message.

Either method attaches a copy of the document(s) to an email message with the attachment name(s) included in the body text, which you then can edit and send.

Depending on your system's configuration, the file name for the attachment may be based on the document's Auto-Name, the document's Print Title, or it may be an automatically generated attachment ID. If an attachment's name is not unique, for example, because you are sending two files with the same Auto-Name, then OnBase makes the name unique by appending **_** (underscore) followed by a number.

Certain characters are not allowed in file names. If these characters appear in the document's Auto-Name, they are substituted with other characters that are allowed. Substitutions are as follows:

Auto-Name Character	Replaced With
\ and /	-
:	;
*****	+
?	!
<	[
>	]
“	'
|	!

Emailing a Document

Emailing a document in the Web Client requires either a web email service (such as Google Gmail or Microsoft Office 365) or a functional, MAPI-compliant email client. Commonly used MAPI email clients are Microsoft Outlook and Novell GroupWise. Client mail programs that deviate from strict MAPI compliance may not function as expected.

You must also have user rights to send a document to an external mail system. User rights are managed by your system administrator.

Note the following considerations for emailing a document from the Web Client:

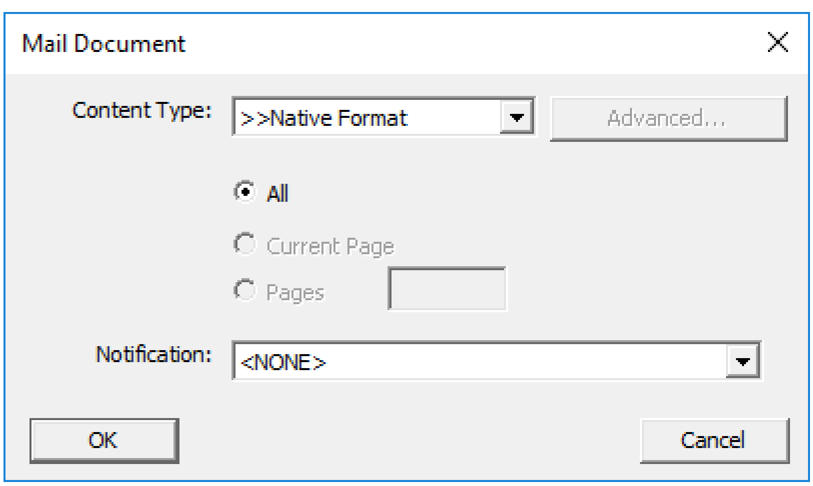
- If your default mail client is IBM Lotus Notes, emails composed in OnBase are auto-saved in the IBM Lotus Notes drafts folder. When emails are discarded in OnBase before being sent, they are not removed from the IBM Lotus Notes drafts folder.
- Email signatures cannot be automatically added for certain mail clients when creating a new email from the Web Client. To use email signatures in the following situations, compose the message and manually add the signature in the native email client:
  - IBM Lotus Notes
  - Microsoft Outlook, when rich text is selected as the default message format
  - The OnBase **Mail Message** dialog box

To email a document in the Web Client:

1. Perform one of the following actions:
   - From the Document Search Results list, select the document(s) that you want to email, right-click, and select **Send To | Mail Recipient**.
   - From an open text or image document, right-click and select **Send To | Mail Recipient**.
   - From an open PDF or OLE document in the ActiveX Web Client, select **Document | Send To | Mail Recipient** in the Document Viewer toolbar.

   The **Mail Document** dialog box is displayed.

Note: Depending on your configured email service, the **Mail Document** dialog box may look slightly different than the following illustration, but it contains the same options.



2. Use the **Content Type** drop-down list to select a file format for the document. The client automatically selects the content type based on the document selected (for example, **Image (.tif)** format is the default content type for PCL, DJDE, AFP, and all other image file formats).

Note: Depending on the file type of the selected document, not all of the following content types may be available. In addition, the names of some of the following options may differ between the ActiveX and HTML Web Client.

Option	Description
Original Format or Native Format	Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied. **Note:** For multi-page image documents, this option saves the document as a single-file TIFF file. **Note:** This content type is only available if the selected documents can be successfully saved or mailed in their original formats.
Rendered Format or AutoDetect Format	Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet
Encrypted PDF (.pdf)	Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay

Option	Description
Image (.tif)	Saves or sends the selected documents as TIFF files. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay **Note:** If a text document is configured to display an overlay by default, then the text document will be saved as an image with the overlay applied.
Text (.txt)	Saves or sends the selected documents in plain text format. Available for documents with a text report format. Overlays are not applied.
HTML (.htm;.html)	Saves or sends the selected documents in .htm format. Available for documents using HTML and MHTML (for example, E-Forms, V-Forms).
ZIP (.zip)	Saves or sends the selected documents as a ZIP file. Available for any document or group of documents.

3. If you select **PDF (.pdf)** or **Image (.tif)**, the following additional advanced options are available. Depending on your configured email service, you may need to click the **Advanced** button to display the options in the **Advanced Options** dialog box. Select the relevant options.

Option	Description
Annotation and/or Note Icon On Document	The document is emailed with any annotations and note icons displayed on the document. If you move a note before emailing the document, the note is displayed in its last saved location. Note locations are saved when a document is closed. **Note:** When printed, annotations and icons are the same size as they appear on the document when it is scaled to 100%.

Option	Description
Note Text On Document	The document is emailed with the title and text of any notes in that note's location on the document, along with the name of the user that created the note and the date and time it was created. If this option is selected with **Annotation and/or Note Icon On Document**, the text is displayed below the icon. If you move a note before emailing the document, the note is displayed in its last saved location. Note locations are saved when a document is closed. **Note:** This option is not respected by Overlapped Text annotations.

4. Select one of the following page options:

Button	Description
All	Sends all pages. This is the only available option for documents sent using the **Send To | Mail Recipient** option from the Document Search Results list.
Current Page	Sends only the current page.
Pages	Sends a range of pages. Page ranges can be entered as a compound selection such 1-5,12,22,31-100,200. Selecting a page range in the **Image (.tif)** format results in a multi-page TIFF file.

5. Depending on your system's configuration, the **Notification** or **Email Template** drop-down list may be displayed. The email template you select will change the default text in the subject and body of your message.

Note: If you select multiple documents and select **Send To | Mail Recipient**, any email template you select will only apply to the first document selected.

Note: If the email template you select contains a Keyword Type that does not exist on the document, that Keyword Value will be replaced with a blank space.

6. Click **OK** or **Send**. An email message is displayed with the selected document pages attached.

Note: You may be required to log into your email system at this time, if you are not already logged in.

7. Enter the recipients of the message.
8. Type the body of the message.
9. Send the message.

Attachment Display Considerations

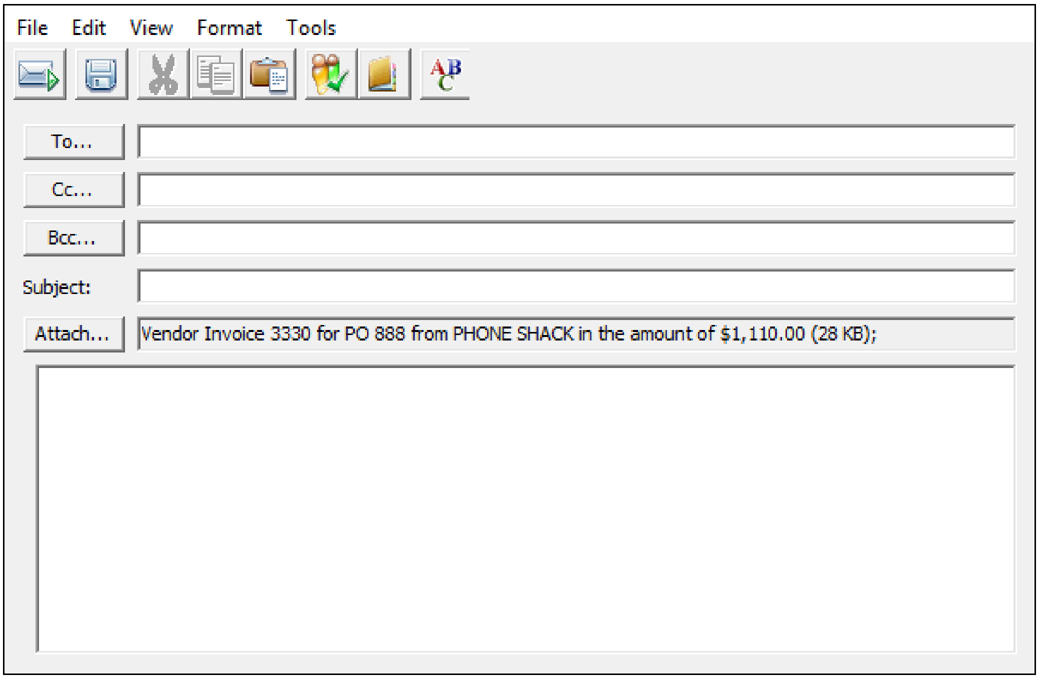
If the document you are sending has an overlay, the overlay is displayed on the attachment only if the overlay is displayed by default when you open the document in OnBase. Overlays are not displayed on attachments sent with a content type of **Native Format**, **Original Format**, or **Text (.txt)**.

Rotating an image without saving the rotation before sending it to a mail recipient will not save the newest rotation.

Using the Mail Message Dialog Box

The OnBase **Mail Message** dialog box is only displayed when using Novell GroupWise.

Note: SMTP is not supported in the Unity Client or Web Client.



To display the **Bcc** field, select **View | BCC**.

The **Format** menu displays message formats available for your Native Mail System. To make the selected format the default format for future messages, select **Set as default**.

The buttons in the **Mail Message** toolbar are described in the following table.

Tip: To change the way the toolbar is displayed, click **View** and select **Large Toolbar** to display large toolbar buttons or **Small Toolbar** to display small toolbar buttons.

Button	Description
	**Send** - Click to send the mail message. This feature is also available by selecting **File | Send**.
	**Save** - Click to save the mail message. This feature is also available by selecting **File | Save**.
	**Cut** - Click to cut highlighted text in the message field. This feature is also available by selecting **Edit | Cut**.
	**Copy** - Click to copy highlighted text in the message field to the clipboard. This feature is also available by selecting **Edit | Copy**.
	**Paste** - Click to paste text in the message field that was copied to the clipboard. This feature is also available by selecting **Edit | Paste**.
	**Check Names** - Click to verify names and email addresses entered in the **To** field from your Address Book. This feature is also available by selecting **Tools | Check Names**.
	**Address Book** - Click to open the Address Book and add email addresses to the **Message Recipients** text boxes by selecting the Name, then clicking the **To**, **Cc**, or **Bcc** buttons. To remove names, double-click on the name in the Message Recipients list and it will return to its original location. This feature is also available by selecting **Tools | Address Book**. **Note:** If you are using a large Novell GroupWise address book (more than 15,000 entries), all recipient names may not be available in the **Select Names** dialog box.
	**Spell Check** - Click to spell check text entered in the message field. This feature is also available by selecting **Tools | Spell Check**. **Note:** Spell check is only supported for workstations with Microsoft Word installed.

Checking Names and Addresses

Clicking the **Check Names** button resolves the recipient's name to the address book by looking for contacts configured as either First Name-Last Name or Last Name-First Name (including middle initial, if applicable). The following rules apply:

Note: Novell GroupWise users need to use a wildcard character, *, when resolving an incomplete name.

- When address book has multiple cases where a name being resolved can be both a First Name or Last Name (e.g., James), the **Check Names** dialog box prompts the user to select the appropriate recipient.
- When you type an entire recipient name as <First Name Middle Initial Last Name>, you must use the correct punctuation for the middle initial (e.g., Betty A. Jones) for the name to be resolved to the address book.
- When you type a recipient name as <Last Name First Name Middle Initial>, you must use the correct punctuation; a comma must follow the Last Name. When a Middle Initial is included, you must follow it with a period (e.g., Jones, Betty A.).

Saving Documents to Files

If you have sufficient privileges, you can save all or part of the document you are viewing as a disk file that you can access on your computer system or through a network connection.

You can save documents to files in the following ways:

- Text and image documents can be saved from either an open document in the Document Viewer or a Document Search Results list.
- OLE and PDF documents viewed in the OLE document viewer can be saved from a Document Search Results list.
- PDF documents viewed in the Web Client PDF viewer can be saved from either an open document in the Document Viewer or a Document Search Results list.
- If the OLE or PDF document opens in its native application (such as Microsoft Word), you may be able to save the document externally by selecting **File | Save As** from the application.

Note: The ActiveX Web Client does not support the Windows protected mode. This could impact the location where you want to save files. See your system administrator for more information.

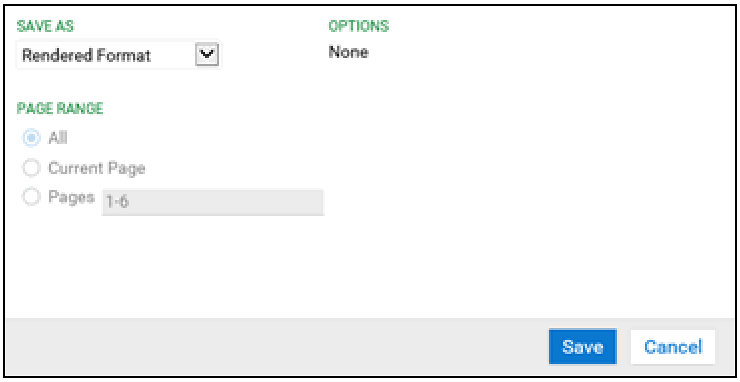
The following steps describe how to save one or more documents to a file:

1. Do one of the following:
   - From the Document Search Results list, select the documents you want to save, right-click, and select **Send To | File**.

     Saving multiple documents requires downloading the documents to a single .zip file. For information on saving multiple documents from the Document Search Results List, see Saving Multiple Documents to a Zip File on page 198.
   - From an open text or image document, right-click and select **Send To | File**, or click the **Save to File** toolbar button.

Note: If you rotate an image without saving the rotation before sending it to file, the rotation will not be saved to the file.

The **Save to File** dialog box is displayed.



2. Select a content type from the drop-down list.

   The client automatically selects a content type based on the document selected (for example, **Image (.tif)** is the default content type for PCL, DJDE, AFP, and all other image file formats). The last used content type may also be preselected.

Note: Depending on the file type of the selected document, not all of the following content types may be available. In addition, the names of some of the following options may differ between the ActiveX and HTML Web Client.

Option	Description
Original Format **or** **Native Format**	Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied. **Note:** For multi-page image documents, this option saves the document as a single-file TIFF file. **Note:** This content type is only available if the selected documents can be successfully saved or mailed in their original formats.
Rendered Format **or** **AutoDetect Format**	Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet

Option	Description
Encrypted PDF (.pdf)	Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay
Image (.tif)	Saves or sends the selected documents as TIFF files. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay **Note:** If a text document is configured to display an overlay by default, then the text document will be saved as an image with the overlay applied.
Text (.txt)	Saves or sends the selected documents in plain text format. Available for documents with a text report format. Overlays are not applied.
HTML (.htm;.html)	Saves or sends the selected documents in .htm format. Available for documents using HTML and MHTML (for example, E-Forms, V-Forms).
ZIP (.zip)	Saves or sends the selected documents as a ZIP file. Available for any document or group of documents.

3. If you selected a content type of **Image (.tif)**, the following options are displayed (in the ActiveX Web Client, click the **Advanced** button to display these options):

Option	Description
Annotation and/or Note Icon On Document	Saves the document with any annotations and note icons displayed on the document. If you move a note before saving the document, the note is displayed in its last saved location. Note locations are saved when a document is closed. **Note:** When saved, annotations and icons are the same size as they appear on the document when it is scaled to 100%.
Note Text On Document	Saves the document with the title and text of any notes in that note's location on the document, along with the name of the user that created the note and the date and time it was created. If this option is selected with **Annotation and/or Note Icon On Document**, the text is displayed below the icon. If you move a note before saving the document, the note is displayed in its last saved location. Note locations are saved when a document is closed. **Note:** This option is not respected by Overlapped Text annotations.

4. If you are saving a PDF document from OnBase, the following option is displayed:

Option	Description
Export Notes with Document	Saves the document and converts any OnBase notes and annotations on the document into Adobe Acrobat comments and drawing markups.

5. If you selected a content type of **Encrypted PDF (.pdf)**, you must enter a password to encrypt the file.
6. Select the document pages you want to save.

Option	Description
All	Saves all pages. This is the only available option for documents saved using the **Send To | File** option from the Document Search Results list.
Current Page	Saves only the current page.
Pages	Saves a range of pages. Page ranges can be entered as a compound selection such 1-5,12,22,31-100,200. Selecting a page range in the **Image (.tif)** format results in a multi-page TIFF file.

7. Click **OK**. The **Save As** dialog box is displayed.
8. Modify the file's name and location as needed. See File Naming Conventions on page 198 for more information.
9. Click **Save** to save the file. Certain characters will be substituted in the file name upon saving.

File Naming Conventions

When you save a document to file, the default **File Name** is based on the document's Auto-Name. For example, if the document name is **Checking Statement Acct#1020** and you save it as a **.tif** file, the default file name is **Checking Statement Acct#1020.tif**

Note: The Auto-Name may be truncated to keep the file name below 256 characters. A Microsoft limitation restricts the full path to a file to a maximum of 260 characters. For more information, see http://msdn.microsoft.com/en-us/library/aa365247%28VS.85%29.aspx.

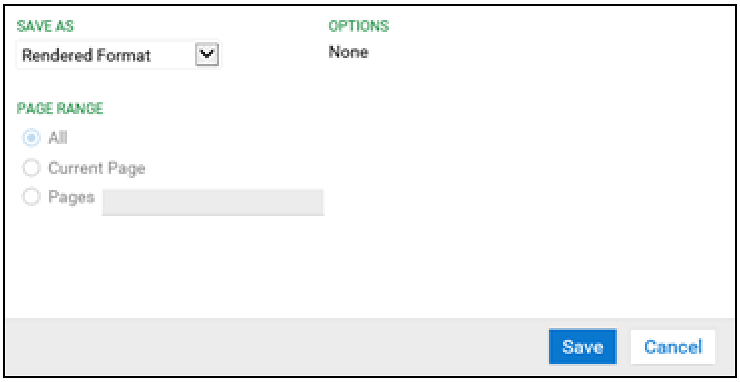
If the default **Save As** location already contains a file with a matching file name, OnBase automatically appends the new file's name with an underscore and an incremental number. For example, if **Checking Statement Acct#1020** already exists in the default **Save As** location, OnBase will name the new file **Checking Statement Acct#1020_1.tif**. See Character Substitutions on page 199 for more information.

Saving Multiple Documents to a Zip File

You can select multiple documents in the Document Search Results list and then save them into a single .zip file. You can also specify the content type in which the documents are saved within the .zip file.

To save multiple documents to a .zip file:

1. Select the documents you want to save from the Document Search Results list.
2. Right-click and select **Send To | File**. The **Save to File** dialog box is displayed.



3. Select a content type from the drop-down list to specify how the selected documents are saved within the .zip file. See Saving Documents to Files on page 194 for more information on saving documents to a specific content type.

Option	Description
Rendered Format	Saves each document in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	Saves all documents as PDF files.
Image (.tif)	Saves all documents as TIFF files.

4. Click **Save**. Depending on your browser, you may be prompted to either open or save the .zip file. Click **Save** to save the .zip file.

Character Substitutions

Certain characters will be substituted in the file name upon saving. Substitutions are as follows:

<table>
<tr><th>Auto-Name Character</th><th>Replaced With</th></tr>
<tr><td>\ and /</td><td>-</td></tr>
<tr><td>:</td><td>;</td></tr>
<tr><td>*</td><td>+</td></tr>
<tr><td>?</td><td>!</td></tr>
<tr><td><</td><td>[</td></tr>
<tr><td>></td><td>]</td></tr>
<tr><td>“</td><td>'</td></tr>
<tr><td>|</td><td>!</td></tr>
</table>

Note: The HTML Web Client uses the same character substitutions with the following exceptions: **" ' : ;** , and spaces are substituted with **_**.

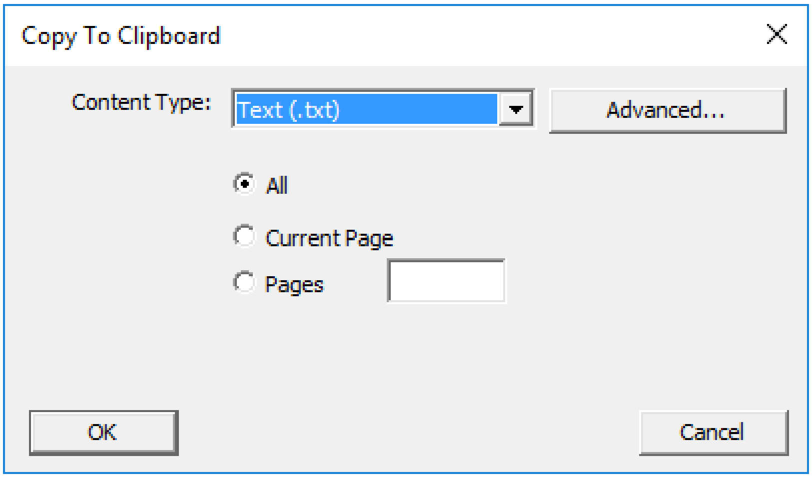
Send To | Clipboard - Copying Documents to the Clipboard

If you have sufficient user rights, you can copy the document that you are viewing to the Windows clipboard.

Note: This function is only available in the ActiveX Web Client.

To copy a document to the clipboard:

1. From an open text or image document, right-click and select **Send To | Clipboard**. The **Copy to Clipboard** dialog box is displayed.



2. Select a content type from the drop-down list.

Option	Description
Image (.tif)	Copies the selected documents as TIFF files. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay
Text (.tif)	Copies the selected documents in plain text format. Available for documents with a text report format. Overlays are not applied.

3. Click **OK**.

Send To | Create New Document - Creating New Documents from Existing Documents

If you have **Create New** and **Save As** user rights, you can create new documents from existing text and image documents stored in OnBase.

Depending on Document Type privileges, the **Create New Document** option may or may not be visible or enabled. Note the following:

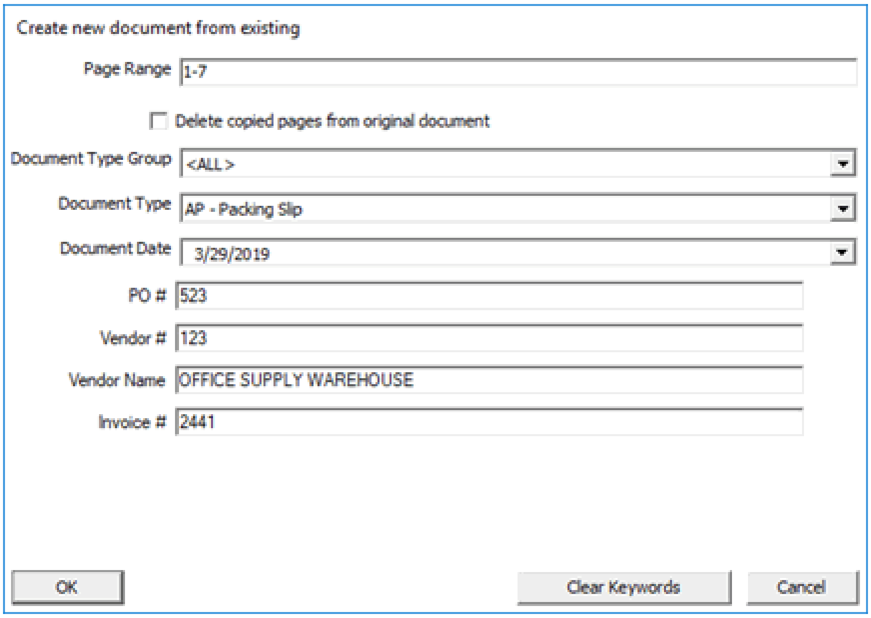
- If any Document Type in the **Search Results list** has **Copy to Clipboard/Save As** and **Create New** privileges, the **Create New Document** menu option is visible.
- If an individually selected document type in the **Search Results list** has **Copy to Clipboard/Save As** privileges, the **Create New Document** menu option is enabled.
- If any Document Type in the **Document Viewer** has **Create New** privileges, the **Create New Document** menu option is visible.
- If the current document in the **Document Viewer** screen has **Copy to Clipboard/Save As** privileges, the **Create New Document** menu option is enabled.
- If the document is locked by another user, the **Create New Document** menu option is disabled.

Create New Documents Using ActiveX

To create a new document using ActiveX controls:

1. From an open text or image document or from the Document Search Results list, right-click and select **Send To | Create New Document**. The **Create new document from existing** dialog box is displayed.

Note: If the document is currently open in another browser session, a message is displayed indicating that a new document cannot be created because the document is locked by another user.



2. In the **Page Range** field, enter the pages or page range you want to include in the new document.

Note: The page range option is available for multi-page image documents only.

A specified page range is required when creating a new document. You can type complex ranges, such as **1-2,5,8-11**.

Tip: The new document will contain the pages you enter in the precise order that they were entered. For example, if you enter **2-5,1** as your page range, the first page of the original document will be the last page of the new document.

3. To delete the specified pages from the original document, select **Delete copied pages from original document**.

Note: The **Delete copied pages from original document** option is not available if the original document is a single page. Additionally, in the ActiveX Web Client, this option is only respected if the Global Client Settings for your OnBase solution have also been configured to delete source pages by default. See your system administrator for more information.

---

4. If the **Create as revision of original document** option is available, select the option to create the document as a revision to the original source document. When this option is selected, the Document Type and Keywords are reset to the source document and cannot be modified. This option is available if all of the following are true:
   - The OnBase solution is licensed for EDM Services.
   - The source Document Type is revisable.
   - You have the proper privileges to create revisions.

Note: A revision of a document cannot be created while the document is locked.

---

5. Index the new document by specifying the **Document Type Group**, **Document Type**, **Document Date**, and any **Keyword Values**.

   Depending on your user rights, the new document may not contain masked Keyword Values from the original document. See the **Encrypted Alpha Keywords** documentation for more information.
6. Depending on your system's configuration and licensing, the **Add To Workflow** option may be available. Select it to add this new document to a Workflow life cycle. This option is only available when licensed for Workflow and the Document Type is part of an existing life cycle.
7. Click **OK**.

   If you chose to delete the copied pages, you are prompted to confirm the deletion. Click **Yes** to confirm, or click **No** to cancel the deletion and return to the **Create new document from existing** dialog box.

Character Substitutions

Certain characters will be substituted in the file name upon saving. Substitutions are as follows:

Auto-Name Character	Replaced With
\ and /	-
:	;
*****	+
?	!
<	[
>	]
“	'
|	!

Note: The HTML Web Client uses the same character substitutions with the following exceptions: " ' : ; , and spaces are substituted with _.

Retrieving Cross-Referenced Documents

If cross-references have been set up by your system administrator, related documents can be automatically retrieved from an open document. You retrieve cross-references in different ways depending on the type of document that is open (image, text, or electronic form). In most cases, your system administrator will instruct you on how to properly retrieve cross-referenced documents.

From Image or Text-Based Documents

Open the document, then double-click on the cross-reference double-click region. The location of the double-click region has been preset by your system administrator.

You can also open cross-references that are not configured with double-click regions. To do so, right-click on the document and select **Cross-References**.

In the HTML Web Client, you can also use the **Ctrl + W** keyboard shortcut. The **Cross Reference Results** window is displayed, listing any cross-referenced documents. Double-click a document to open it.

Note: This shortcut is not supported in Chrome or Firefox.

From E-Forms or HTML Documents

To initiate a cross-reference from an E-Form or HTML document, right-click on the document and select **Cross-References**.

In the HTML Web Client, you can also use the **Ctrl + W** keyboard shortcut.

Note: This shortcut is not supported in Chrome or Firefox.

If you are viewing an E-Form that has a cross-referencing button, you can also click this button to retrieve related documents.

From PDF or OLE Documents

To initiate a cross-reference from an open OLE document, such as a Word document, select **Document | Cross-References**.

To initiate a cross-reference from an open PDF document, do one of the following:

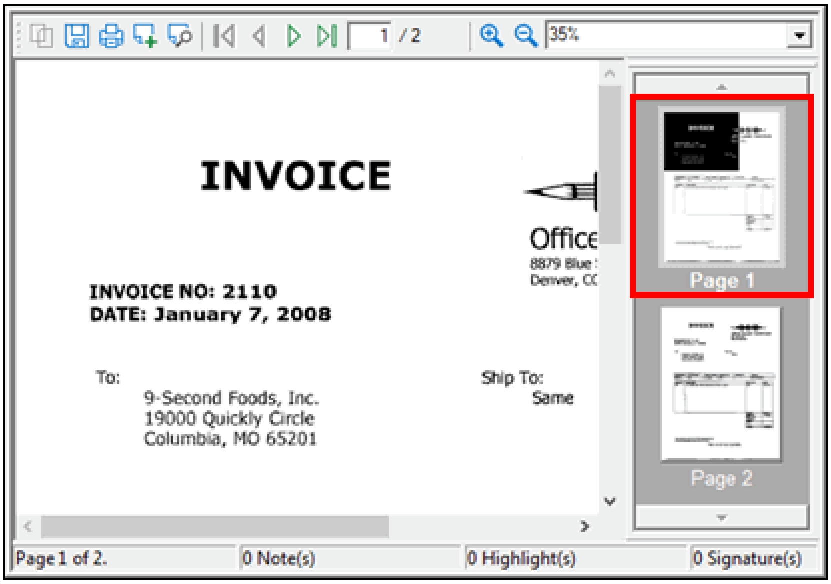
- Click the **Cross-References** button from the viewer control toolbar.
- Select **Document | Cross-References** from the menu above the viewer.

Note: Some Document Types do not support cross-references. See your system administrator for additional information.

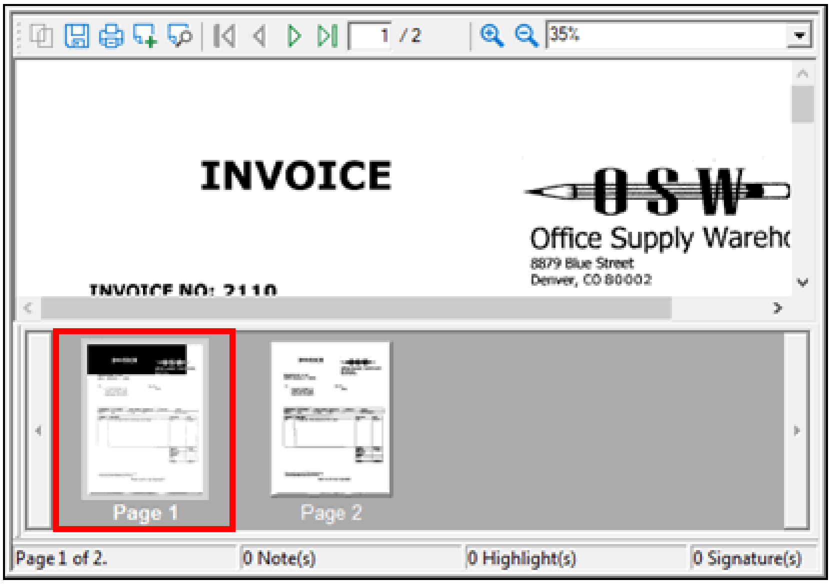
Note: If there is more than one value for the referenced Keyword Type, all documents matching cross-reference criteria are retrieved.

Pages Toolbar - View Document Thumbnails

Document thumbnails are miniature representations of the document pages, which provide a method of document navigation. Document thumbnails display in the **Pages** toolbar window in the Document Viewer. By default, the Pages toolbar is displayed along the right edge of the Document Viewer in a vertical column.



You can change the position of the **Pages** toolbar by dragging and dropping it to another position in the Document Viewer. You can undock the toolbar from the Document Viewer using the same method.



Show or Hide Thumbnails

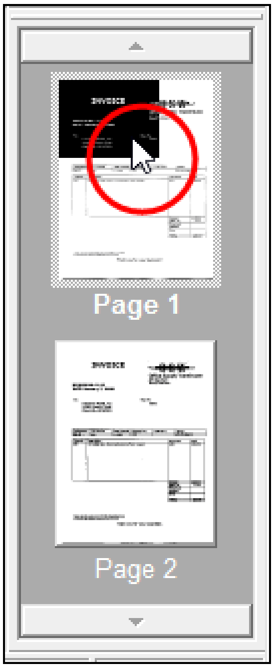
Thumbnails can be displayed or hidden by default. To show or hide thumbnails, right-click anywhere in the Document Viewer and select **Toolbars** | **Pages**. This toggles the thumbnails on or off.

Navigating the Document Using Thumbnails

You can navigate to a different page in the open document by double-clicking on the thumbnail for that page.

In documents with a large number of pages, you can click the up or down arrows to scroll through the page thumbnails. You can also quickly scroll through several thumbnails at a time by holding down the **Ctrl** button and left-clicking the up or down arrows.

If the document being viewed is larger than the viewer window, a shaded area on the thumbnail indicates the portion of the document currently displayed in the viewer window. Click and drag the shaded area to view other areas of the document.



Zooming Thumbnails

If thumbnail zoom is enabled in Viewer Options, you can zoom in on a thumbnail by placing your pointer over it. The percentage increase (or decrease) in thumbnail size is determined by the Zoom Width and Zoom Height settings in Viewer Options.

Reordering Pages in a Document Using Thumbnails

If you have appropriate privileges, you can reorder the pages in an image document using thumbnails.

1. In the Pages toolbar, double-click the thumbnail of the page that you want to move.
2. Right-click and drag the thumbnail to its new position. When you release the thumbnail, the Pages toolbar is updated to reflect the new sequence.

Note: You cannot reorder pages on a read-only document. If you attempt to do so, the system informs you that the document is read-only and cannot be modified.

Adding Pages to a Document Using Thumbnails

If you have appropriate privileges, you can add pages from one image document to another by dragging a thumbnail from one viewer window onto the Pages toolbar of a document in another viewer window.

You cannot add pages to read-only documents, to non-image documents, or to non-revisable documents that have a different file type than the added pages. If you attempt to do so, the system displays a warning indicating why the pages could not be added.

Note: You can only add pages to image documents in the ActiveX viewer.

To add pages to an image document:

1. Retrieve the document to which you want to add pages.
2. In the document select list, right-click the name of the document containing the page or pages that should be added to the document from the previous step and select **Open in New Window**.

   The selected document is displayed in a new viewer window.
3. In the **Pages** toolbar of the new window, select the page that you want to add to the first document.
4. Right-click and hold down the mouse button on the thumbnail for that page.
5. Drag-and-drop the thumbnail to the pages toolbar of the first document. When you drop the thumbnail on the pages toolbar, the page is added in the position where you dropped it. For example, if you drop the thumbnail on top of page 1, the new page becomes page 1, and the old page becomes page 2.

Deleting Pages from a Document Using Thumbnails

If you have appropriate privileges, you can remove pages from an image document by right-clicking the thumbnail of the page you want to delete in the **Pages** toolbar and selecting **Delete Page**. A confirmation window will be displayed to make sure you really want to delete the page.

You cannot delete pages from a read-only document. The **Delete Page** option is unavailable if the document is read-only.

Printing Documents

The **Print** option is available if your computer system has access to a printer, and you have the appropriate user rights.

1. To print a document, perform one of the following actions:
    - From an open document or from one or more selected documents in the Document Search Results list, right-click and select **Print**.
    - From an open document, click the **Print** toolbar button.

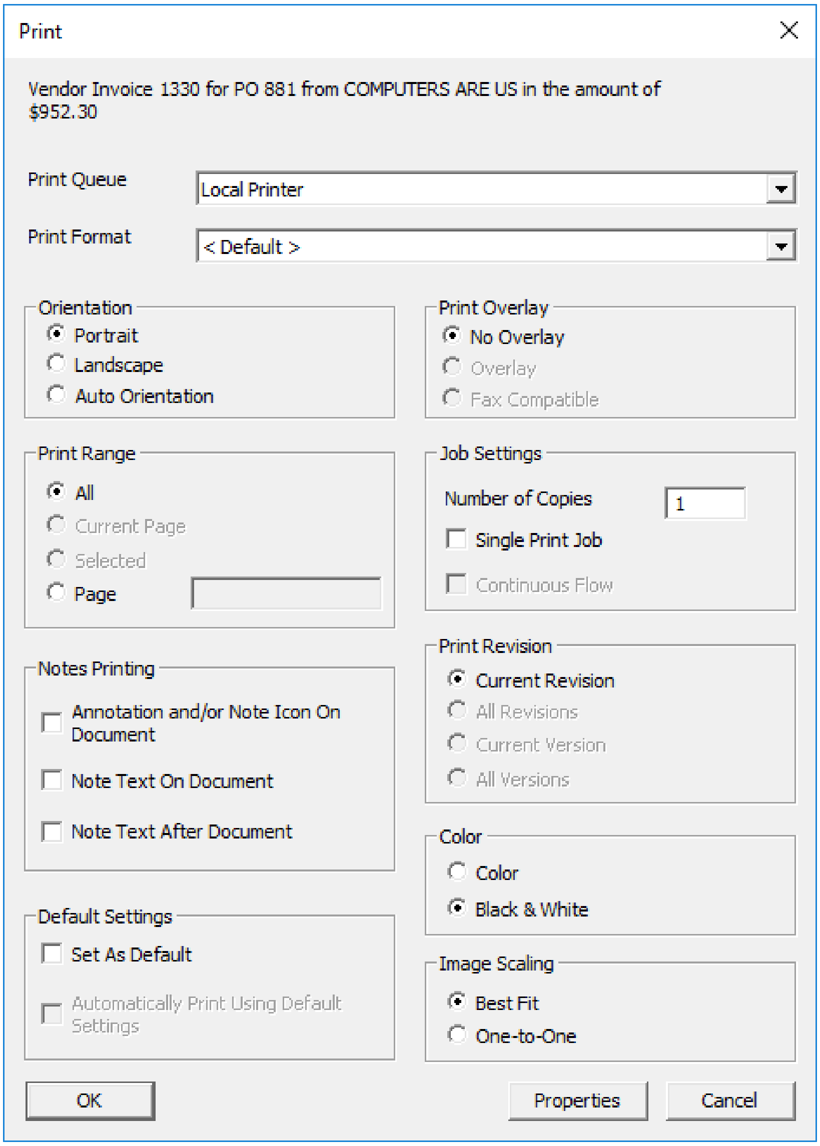
- From an open OLE document, select **Document | Print**.

  If the option to print an OLE document is unavailable, you may still be able to send the document to a server print queue.

Note: Depending on your system's configuration, OLE documents may use your printer's default settings or the OLE document's default settings instead of the settings selected in the OnBase **Print** dialog box. If your document is not printing as expected, change your printer's settings or your document's settings to print the document as desired.

- If the document is open in an external application, select the print option from the external application. (For example, select **File | Print** from the application.)

The **Print** dialog box is displayed.



2. Select one of the available printers and the appropriate print options. For a description of print options available from the OnBase **Print** dialog box, see the following table.

Note: Depending on your configuration, the **Print** dialog box may default to print all pages or the current page of the document.

Option	Description
Print Queue	Select the desired network print queue (mapped to the desired printer) from the **Print Queue** drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will be used to print the document when it is sent to that queue. Available Print Queues are defined by your system administrator. **Note:** To send a document to a Print Queue in the HTML Web Client, see Sending Documents to Print Queues in the HTML Web Client on page 106.
Print Format	The **Print Format** drop-down list displays configured print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults in the print dialog. The print format default is the print format associated with the Document Type of the first document selected for printing. If a batch is selected or no print format is associated with the Document Type, the setting is **<Default>**. To override the print format defaults, change the settings in the print dialog box. When printing multiple items with varying document types, select **<Use Doc Type Default>** from the **Print Format** drop-down list. This selection prints each document using the print format configured for its Document Type. **Note:** The **<Use Doc Type Default>** option is not available when printing Document Types that do not have a default print format.
Orientation	**Portrait**: Prints the top of the page on the shortest side of the paper. **Landscape**: Prints the top of the page on the longest side of the paper. **Auto Orientation**: Prints the page according to its dimensions. For example, if the height of the page is greater than the width, **Portrait** is used. If the width of the page is greater than the height, **Landscape** is used. For multi-page images, the orientation is determined on a page-by-page basis. **Note:** These options do not apply to Microsoft Word documents and are not available for PDF documents. **Note:** This setting is not respected when printing XML documents. XML documents are printed using the default orientation setting of the printer.

Option	Description
Print Overlay	**No Overlay:** Prints the document without the associated overlay. **Overlay**: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type. **Fax Compatible**: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type. **Note:** Printing overlays is not supported when running OnBase as a print server.
Print Range	**All**: Prints all pages of the document(s). **Note:** The **All** Print Range option is the only option available when printing PDF documents. **Current Page:** Prints the current page. **Selected**: (Currently not available) **Page**: Prints a range of pages in the document. **Note:** If you enter a complex range into this field, the pages are printed in the order entered. For example, if you entered **5, 1-3, 9,** then page 5 of the document would be printed first, followed by pages 1, 2, 3, and 9. You cannot enter complex ranges when printing to a server print queue. **Note:** The **Print Range** setting is not supported for printing E-Forms in the ActiveX Web Client.

Option	Description
Job Settings	**Number of Copies**: Enter the number of copies to print. **Note:** When printing several copies of a multi-page document to XPS or PDF Creator, some print jobs may combine. **Single Print Job**: If multiple documents are highlighted for a print request, Single Print Job instructs OnBase to combine the selected documents into a single Windows print job, rather than printing each separately. **Note:** The **Single Print Job** option only applies to documents that are natively rendered. Documents such as E-Forms and OLE documents cannot use the **Single Print Job** option. **Continuous Flow**: If the multiple documents selected for a Single Print Job are formatted for a multi-image layout on the page, the **Continuous Flow** option tells OnBase to continue filling the page with images from the next document, filling the existing multi-page format before proceeding to the next page. **Example**: If you select three two-page documents for printing and choose a print format configured to print two rows and two columns, your output would be three pages, each of which is a single document. If you select **Continuous Flow**, your output would be two pages, the first page having two documents and the second having the remaining third document. Continuous Flow cannot be used to control the format of PCL documents in a multi-image layout.
Notes Printing	**Annotation and/or Note Icon On Document**: Prints the note annotation (graphical representation of a note) on the document. **Note Text On Document**: Prints the title and text of any notes in that note's location on the document, the name of the user that created the note and the date and time it was created, and the Print Title configured for the selected Document Type. This option is not respected for HTML documents, OLE documents, or PDF documents. This option is not respected by Overlapped Text annotations. **Note Text After Document**: Prints the title and text of any notes, the name of the user that created the note and the date and time it was created, and the Print Title configured for the selected Document Type on a separate page. **Note:** Depending on your system's configuration, some note icons or text may not be printed no matter what **Notes Printing** options you have selected. See your system administrator for more information. **Note:** The **Annotation and/or Note Icon On Document** and **Note Text On Document** options do not apply to E-Forms, HTML forms, or XML documents.

Option	Description
Print Revision	These options are only available if your database is licensed for EDM Services. For more information, see the **EDM Services** documentation. **Note:** The **Current Revision** option is automatically selected.
Color	**Color:** Select to print in color. **Black & White:** Select to print in black and white. **Note:** These options do not apply to Microsoft Word documents and are not available for PDF documents. **Note:** Depending on your installed print drivers, these options may not be respected with certain printers.
Default Settings	**Set as Default:** Select this option to use the settings that you have selected in this dialog box as the default print settings. The settings will remain selected as default on that workstation for all document types until the check box is deselected. **Automatically Print Using Default Settings:** This setting is reserved for future use.
Image Scaling	**Best Fit:** Prints image to fit, with scaling as necessary. **One-to-One:** Prints image actual size/scale (1:1 in terms of inches).

Note: Select the **Properties** button to configure options specific to the selected printer. See the documentation for your printer for more information on these options. The **Properties** button is not available for PDF documents.

3. Click **OK**.

Note: Not all methods are available from all Document Types.

E-Forms not Printing Correctly

Some users may encounter the following issue: when printing an E-Form from a results list (such as a Document Search Results list), the E-Form is printed without any data (i.e., only a blank shell of the E-Form is printed). This behavior is caused by the way Internet Explorer handles security. Users are still able to print E-Forms by opening the E-Form and printing from the Document Viewer.

Print or Copy Sections of a Document Using Rubber Band

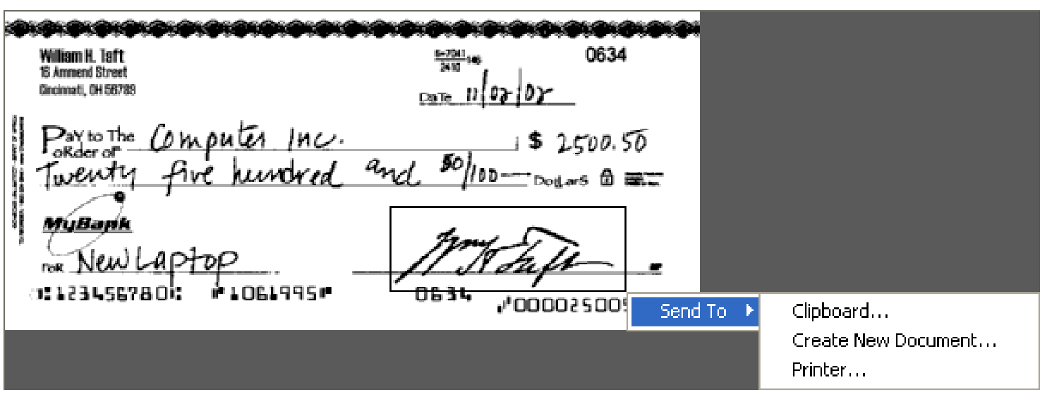
You can print or copy an area of a text or image document using the Rubber Band feature. Copied content can be pasted into another program or be used to create a new document in OnBase. To successfully print or copy selected areas of a text document with an overlay applied, the overlay must be removed.

Note: The Rubber Band feature can be used to create annotations if **Draw Annotation On Rubberband** is selected in your Viewer Options. When this option is selected, you can use the Rubber Band feature to create the annotation currently selected in the Annotations toolbar without clicking the **Toggle Annotation** button.

1. Press and hold the **Ctrl** key on the keyboard.
2. With the **Ctrl** key still pressed, click and drag your mouse pointer over the area of the document that you want to copy or print.

Tip: Click and drag your pointer without pressing **Ctrl** to zoom in on the selected area.

3. When you have defined the area to copy or print, release the mouse button. A **Send To** menu displays several options.



4. Select one of the following options:

Option	Description
Clipboard	Copies the selected content to the clipboard. A confirmation message tells you whether text or image content has been copied. If the document is a text document, the selected text is copied. If the document is an image document, the selected area of the image is copied. You can then paste the copied content into an appropriate program.

Option	Description
Create New Document	Available for image documents only, this option creates a new OnBase document from the selected area. After you select this option, the **Create new document from existing** dialog box is displayed. Index the new document by specifying the Document Type Group, Document Type, Document Date, and any Keyword Values. • Click **OK** to create the new document. • Click **Clear** to remove the currently displayed values. • Click **Cancel** to exit without creating a new document.
Printer	Prints the selected area. If you select this option, the **Print** dialog is displayed. Select the desired settings and click **OK**. The **Confirm** dialog box displays the following message: **Do you want the zoom region resized to fit the printed page width?** • Select **Yes** to resize the selected area to the fit the width of the printed page. • Select **No** to print the selected area in its true size. • Select **Cancel** to exit without printing.

Sending Documents to Print Queues in the HTML Web Client

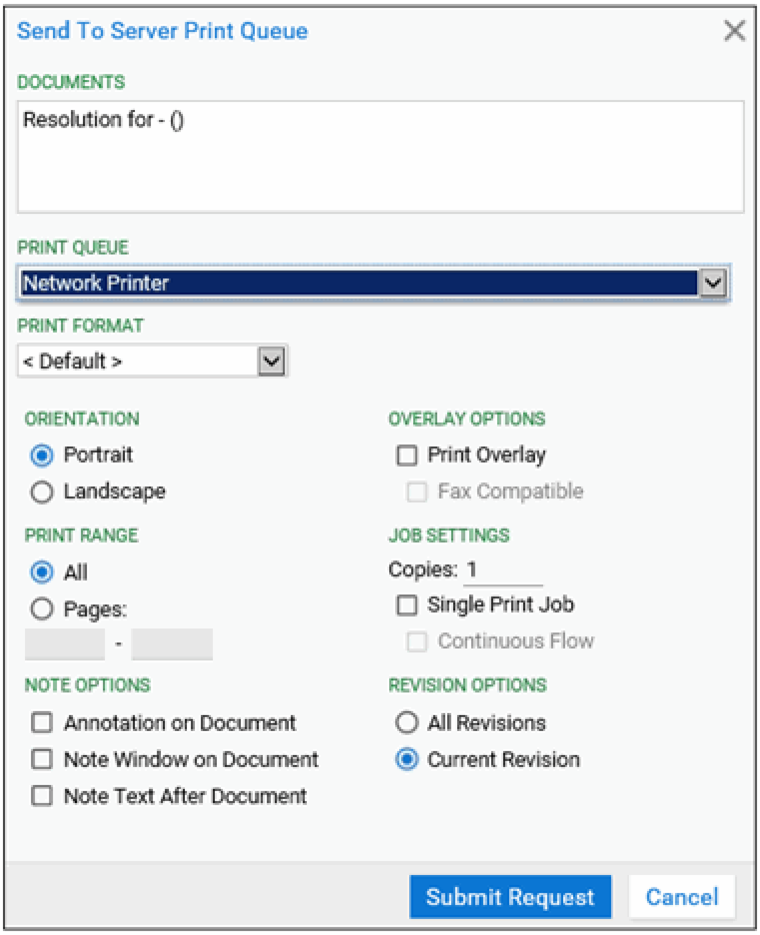
If you have sufficient privileges, you can send a document to a server print queue.

Note the following considerations:

- This option is only available in the HTML Web Client.
- This option does not support printing Unity Forms.
- This option does not support two-sided printing.

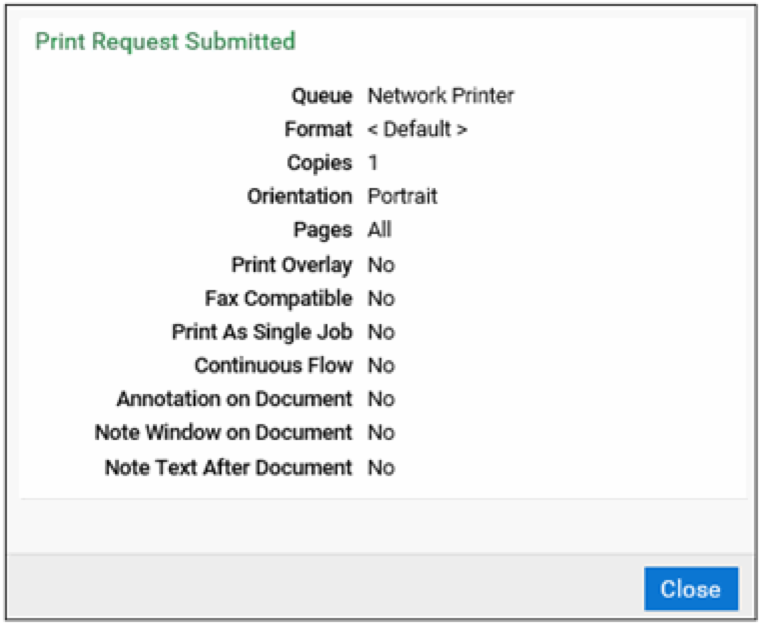
To send documents to a server print queue:

1. Right-click the document from the Document Search Results list or Document Viewer and select **Send To | Server Print Queue**. The **Send To Server Print Queue** dialog box is displayed.



2. Edit the options as needed. See the following table for information.

3. Click **Submit Request**. The **Print Request Submitted** dialog box is displayed listing all the options you selected.



4. Click **Close** to close the dialog box.

Print Queue Dialog Box Options

The following table describes the options in the **Print Queue** dialog box.

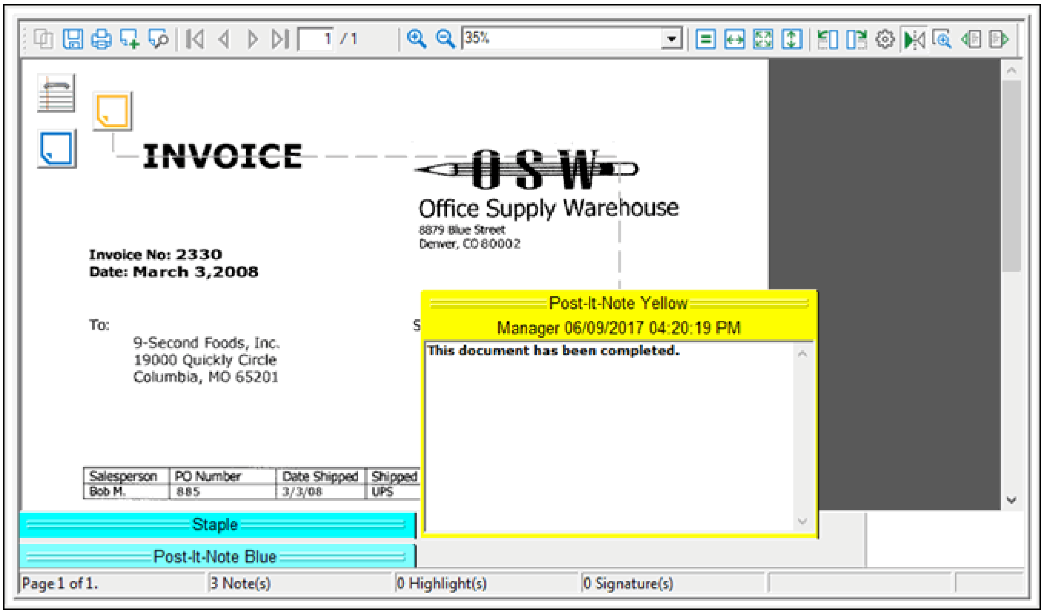
Option	Description
Print Queue	Select the desired network print queue (mapped to the desired printer) from the **Print Queue** drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will be used to print the document when it is sent to that queue. Available Print Queues are defined by your system administrator.
Print Format	The **Print Format:** drop-down list displays configured print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults in the print dialog. The print format default is the print format associated with the document type of the first document selected for printing. If a batch is selected or no print format is associated with the Document Type, the setting is **<Default>**. To override the print format defaults, change the settings in the print dialog box.
Orientation	**Portrait**: Prints the top of the page on the shortest side of the paper. **Landscape**: Prints the top of the page on the longest side of the paper.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Print Range</td><td>All: Prints all pages of the document(s).
Note: The All Print Range option is the only option available when printing PDF documents.
Selected: (Currently not available)
Pages: Prints a range of pages in the document.</td></tr>
<tr><td>Note Options</td><td>Annotation On Document: Prints the note annotation (graphical representation of a note) on the document.
Note Window On Document: Prints the note text on the document.
Note Text After Document: Prints the text of all document notes on a separate page.</td></tr>
<tr><td>Overlay Options/Print Overlay</td><td>Print Overlay: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type.
Fax Compatible: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type.</td></tr>
<tr><td>Job Settings</td><td>Copies: Enter the number of copies to print.
Single Print Job: If multiple documents are highlighted for a print request, Single Print Job instructs OnBase to combine the selected documents into a single Windows print job, rather than printing each separately.
Note: The Single Print Job option only applies to documents that are natively rendered. Documents such as E-Forms and OLE documents cannot use the Single Print Job option.
Continuous Flow: If the multiple documents selected for a Single Print Job are formatted for a multi-image layout on the page, the Continuous Flow option tells OnBase to continue filling the page with images from the next document, filling the existing multi-page format before proceeding to the next page.
Example: If you select three two-page documents for printing and choose a print format configured to print two rows and two columns, your output would be three pages, each of which is a single document.
If you select Continuous Flow, your output would be two pages, the first page having two documents and the second having the remaining third document.
Continuous Flow cannot be used to control the format of PCL documents in a multi-image layout.</td></tr>
<tr><td>Revision Options/Print Revision</td><td>All Revisions: Prints all document revisions that you have permission to view.
Current Revision: Prints the most current document revision that you have permission to view.</td></tr>
</table>

Notes Overview

Digital notes can be placed on documents and can be used for many purposes, including the following:

- Emphasizing specific content within the document
- Clarifying or explaining items in a document
- Representing the current state of the document.



Note: The look and feel of the Notes differ depending on whether you are logged in to the ActiveX Client or the HTML Client.

The characteristics of different Note Types are defined by your system administrator:

- Some notes may be configured to hide by default. To view any hidden notes, you can display a list of all notes on the document and open any notes from the list.
- Depending on your system setup and user privileges, you may be able to view, modify, delete or add notes to a Document Type, as well as set privacy options.

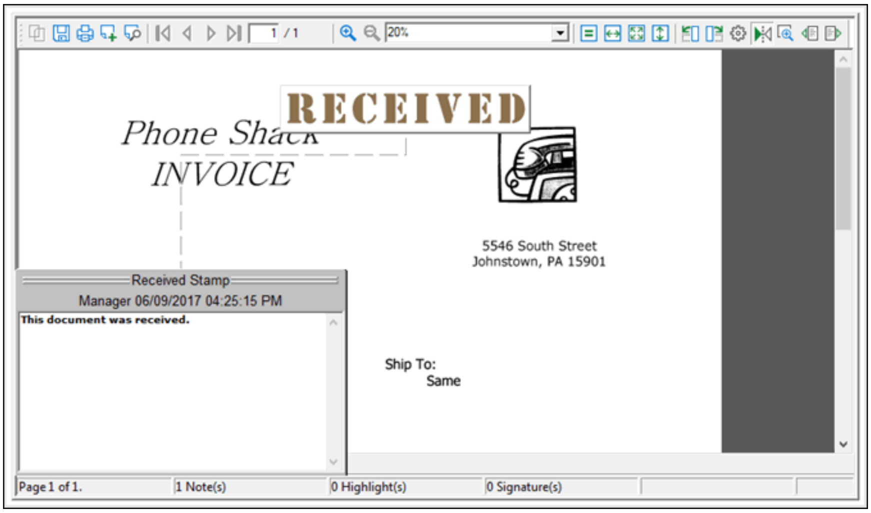
- You can type text in notes and search for note text in Document Retrieval or Custom Queries. Some notes are configured with default text that is also searchable using Document Retrieval or Custom Queries.
- Typically, notes are configured to show an Auto-Name string in the title bar, identifying the type of note when it is placed on a document. Other typical items in an Auto-Name string are note creation date and time and the name of the user who created the note.

Note: Any time or date in the note Auto-Name string (the top line of the note header) respects the Windows Region and Language settings of the user applying the note at the time the note is added. The time and date in the second line of the note header respect the Windows Region and Language settings of the user currently viewing the note.

Note Icons

Depending on the Note Type configuration and the Document Type, the note may display as an icon, indicating the type of note, such as a **Received** stamp.

Note: Note icons can only be displayed on image and text documents.



Options

The **Options** button on the Viewer Control toolbar allows you to choose whether note icons and annotations are displayed while you're viewing a document.

View Notes - Open and View Notes or Annotations

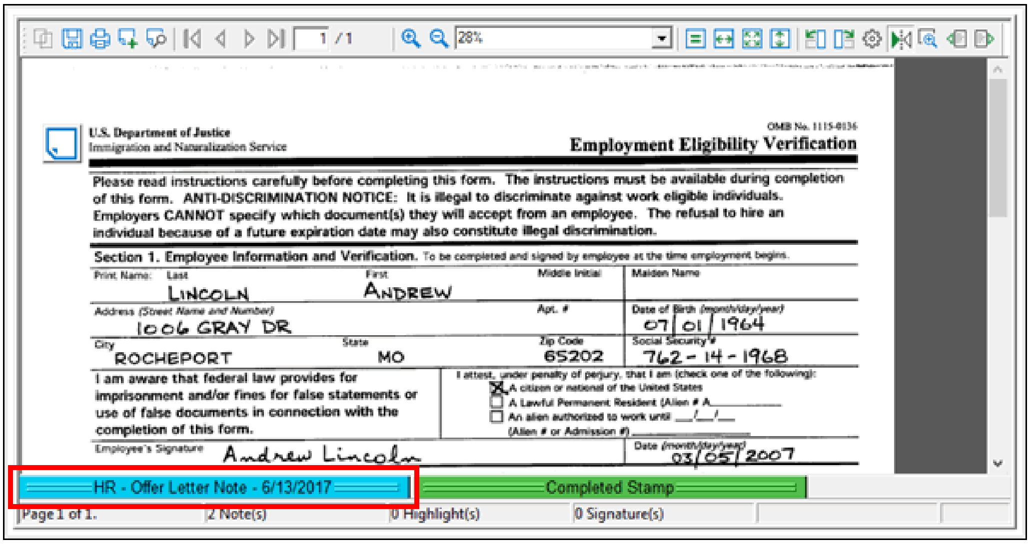
Users with the appropriate viewing rights will see most notes and annotations displayed on the document or displayed as tabs in the Notes toolbar at the bottom of the document.

When you view OLE documents (such as Microsoft Office documents or PDFs) in the Web Client, the number of notes on the document is displayed in the **Note(s)** section of the status bar and in the **Notes** pane of the Document Viewer.

Viewing Notes

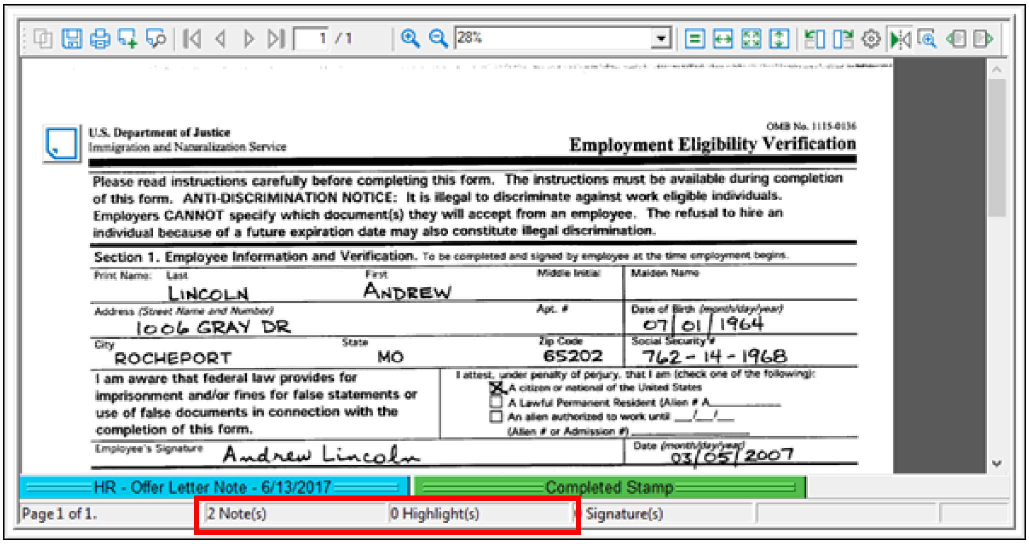
You can view notes or annotations using any of the following methods:

- Double-click the note's icon from the Document Viewer.
- Click the **View Notes** toolbar icon (ActiveX viewer only).
- Click the note's tab displayed in the **Notes** toolbar (ActiveX viewer only).

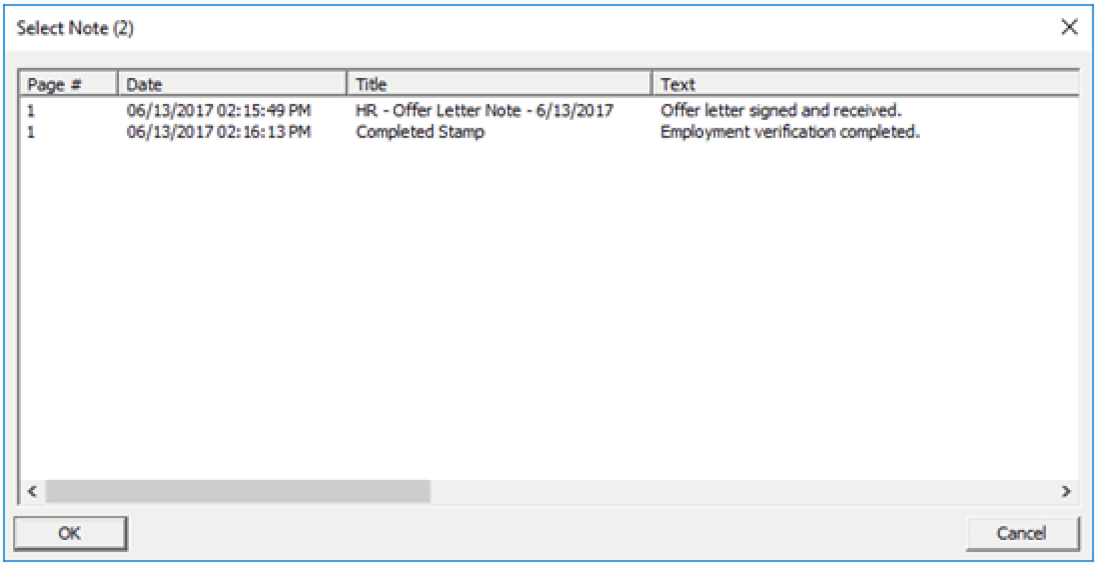


- Right-click an open document and select **Notes | View Notes**.

- Double-click the note in the **Notes List** toolbar.
- Double-click the **Note(s)** section or the **Highlight(s)** section of the status bar.



If a note or annotation exists on a document, it is listed in the **Select Note** dialog box.



The list includes the page where the note is found, the note type, the text of the note, and the date the note was created. Click on the column headings to sort the notes by that column.

Open a note by either selecting the note in the **Select Notes** dialog box and clicking **OK**, or by double-clicking the note in the **Select Note** list.

Note: Depending on your system's configuration, you may be unable to open certain notes in the **Select Note** dialog box. See your system administrator if you have any questions.

Moving Notes

If you have sufficient privileges to modify a note, you can move the note on a document.

To move a note, click and drag the note icon on the document. The new position is saved when you close or print the document.

Note: If you move a note off of the document, OnBase automatically resets the note position to the top left corner when the document is closed. When the document is opened again, the note is displayed in the top left corner.

Adding Notes, and Editing and Deleting Notes and Annotations

Notes and annotations can be added to, edited, or deleted from documents. Before you start working with Notes and annotations, ensure you have appropriate privileges for adding, editing, or deleting them.

Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text and position only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only. You can reposition the note while viewing the document, but the note will return to its original position when you close the document.

Take note of the following when working with notes and annotations:

- Notes and annotations may contain messages that can be displayed and edited. If you have appropriate privileges, you can delete both notes and annotations from the **Notes** right-click menu.
- Note behavior differs slightly on HTML documents and in the HTML Document Viewer. For information about working with notes in these cases, see Add a Note in the HTML Document Viewer on page 228.
- Annotations are created using the Annotations toolbar. To add an annotation to a document, see the procedure for creating annotations.

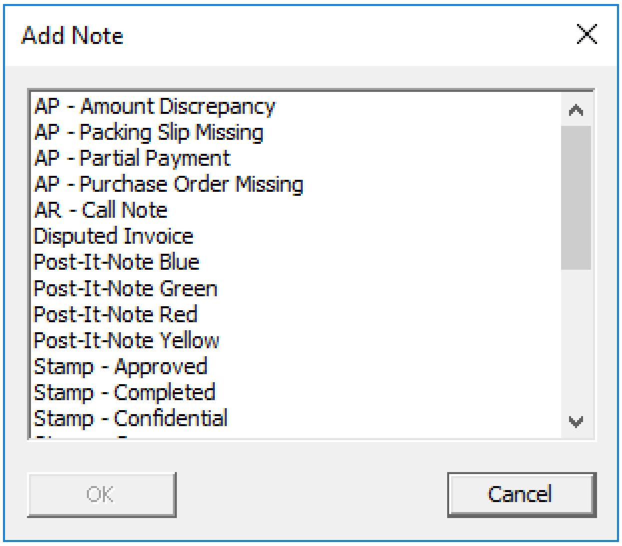
Add a Note to a Document

Users with privileges to create notes can add new notes to documents from the **Add Note** dialog box. Users can only add notes of the type(s) that his or her User Group(s) has rights to create.

Note: If you are viewing a document that is locked by Records Management, you can create new notes, but you cannot modify any existing notes.

1. Access the **Add Note** dialog box using either of the following methods:
   - Click the **Add Note** button from the Viewer Control toolbar.
   - Right-click the document and select **Notes** | **Add Note**.

   The **Add Note** dialog box displays the Note Types that you have rights to create.



2. Select a Note Type and double-click, or click **OK** to add the note.
3. Enter descriptive text and move the note icon to the desired location on the document. The note text and icon, in the position you placed it, is saved automatically.

Add a Note in the HTML Document Viewer

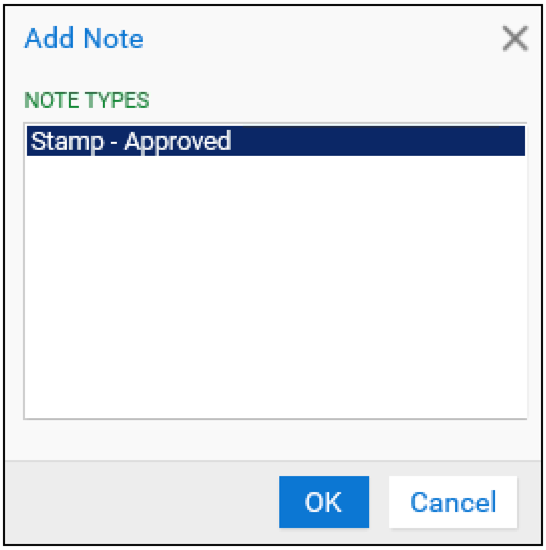
The following steps describe how to add notes to HTML documents and E-Forms and how to add notes in the HTML Document Viewer.

Note: You cannot add annotations to HTML documents.

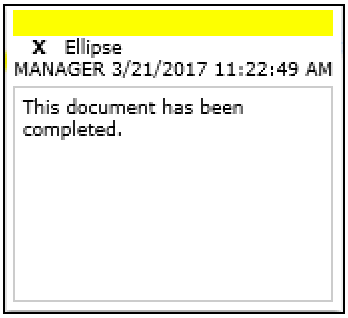
To create a note:

1. Right-click on the document and select **Note | Add Note**, or press **Ctrl + N**. The **Add Note** dialog box lists the available Note Types.

Note: The **Ctrl + N** shortcut is not supported in Chrome.



2. Select a Note Type and double-click, or click **OK** to add the note.
   The note is placed in the upper left-hand corner of the document. You can move the note by clicking and dragging the note or note icon on the document. The new position of the note is saved when an action is performed in either the document viewer toolbar or the right-click menu.



3. Edit or type a message in the note's text box. Notes are limited to 250 characters.
   - To minimize a note on an HTML document, double-click the note's title bar. The note's icon is displayed while the note is minimized. To view the note's text, double-click the note's icon.
   - To delete a note from an HTML document, click the **X** in the note's title bar. Click **Yes** to verify that you want to delete the note.
   - To change the note type, right-click the note and select **Change Note Type**. Select a new note type for the note.

Edit Note or Annotation Text

To edit a note, open the note and edit the note contents. Right-click for text-editing options:

Note: If you are unable to access the text box, you may not have user rights to edit the note.

- **Undo** - select to undo the last typed action
- **Cut** - removes selected text and place it on the clipboard
- **Copy** - retains selected text, but place it on the clipboard
- **Paste** - inserts clipboard text in to the active area (last place the mouse was clicked)
- **Delete** - deletes selected text
- **Select All** - selects all text (including default note text)

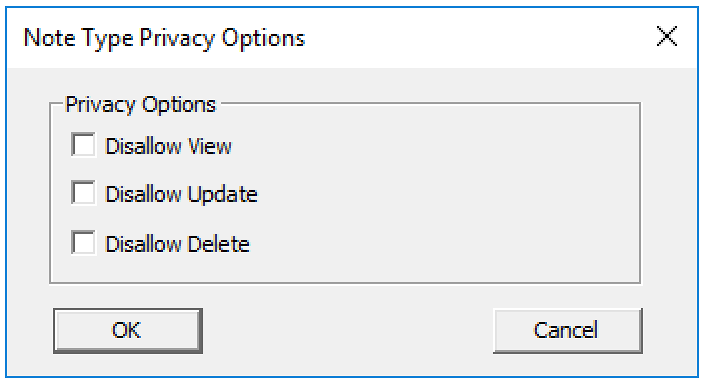
Note: Changes to notes and annotations are saved automatically. Notes that are moved off of the document revert to their last saved position.

Editing Note Type Privacy Options

Privacy options determine whether other users can view, edit, or delete an individual note you created.

1. To edit privacy options on a specific note, do one of the following:
   - Right-click on the note title bar and select **Privacy Options**.
   - Right-click the note in the **Notes List** toolbar and select **Privacy Options**.

   The **Note Type Privacy Options** dialog box is displayed.



   Some options may be unavailable depending on how the Note Type was set up by a system administrator.
2. Select one of the following options to restrict other users from performing the corresponding action.

Privacy Option	Description
Disallow View	Selecting this check box disallows users from viewing the note.
Disallow Update	Selecting this check box disallows users from updating information on the note.
Disallow Delete	Selecting this check box disallows users from deleting the note.

3. Click **OK** when you have selected the desired privacy options.

Deleting a Note

To delete an existing note in the ActiveX Viewer, do one of the following:

- Right-click on the note title bar and select **Delete Note**.
- Right-click the note in the **Notes List** toolbar and select **Delete Note**.

To delete an existing note in the HTML Document Viewer, do one of the following:

- Open the note and click the X in the note title bar.
- Click the **Notes** section on the bottom of the screen. Select the note you want to delete, and then click **Delete Note**.

Click **Yes** when prompted to confirm.

Note: You cannot delete an existing note on a locked document. See your system administrator for information regarding Document Lock Administration.

Changing the Note Type

To change the Note Type of an existing note, navigate to the page of the document the note appears on, and do one of the following:

- Right-click on the note title bar and select **Change Note Type**.
- Right-click the note in the **Notes List** toolbar and select **Change Note Type**.

Note: The **Change Note Type** option in the **Notes List** toolbar is only available when the page the note belongs to is displayed in the Document Viewer. For example, the option is not available if page 1 is displayed, and the note you right-click is on page 2.

Select the new type of note from the **Change Note Type** dialog box and click **OK**.

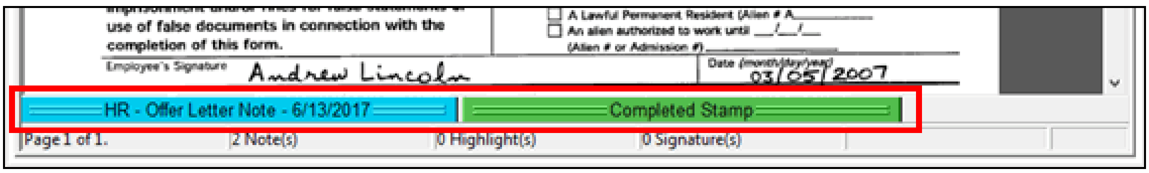
Note: Depending on system configuration for Note Types, some Note Types may be unavailable from the **Change Note Type** dialog box when using the ActiveX Web Client. See your system administrator for more information.

Notes Toolbar

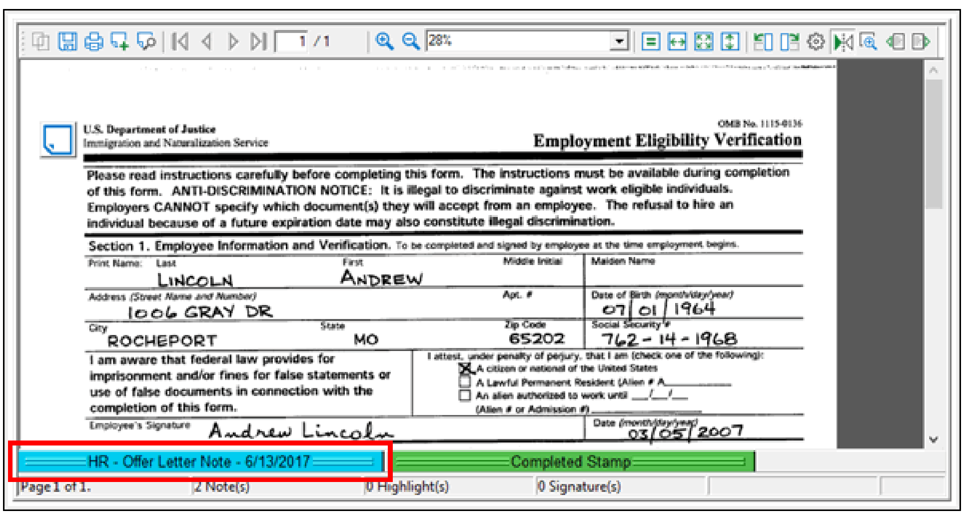
The **Notes** toolbar is a row of tabs representing notes and annotations on the current page. The toolbar is displayed along the bottom of the Document Viewer. You cannot undock and move this toolbar to another location.

Note: The **Notes** toolbar is only available in the ActiveX Web Client.

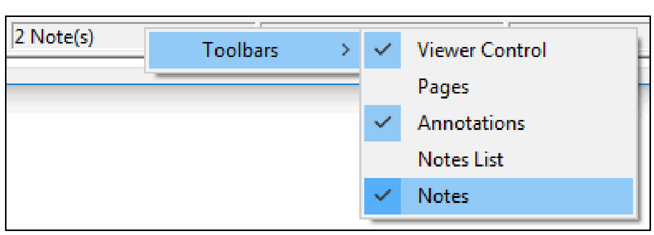
Note: If you are viewing a document that is locked by Records Management, you cannot create or modify notes.



Click a note tab to read the note or annotation.



If you do not see the note tab, but there are notes on the document, ensure that the **Notes** toolbar is visible. Right-click the status area on the bottom of the screen, and then select the **Toolbars | Notes** menu option.



Note: HTML documents do not have toolbars. When you open an HTML document with one or more notes, OnBase displays the associated icon(s). Double-clicking an icon opens the note and displays its text. This action works only from HTML documents or from documents viewed in the HTML Web Client. Double-clicking a note icon from the ActiveX Web Client will trigger any cross-references set up on the document.