OnBase®

Foundation EP5

Document Composition

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Copyright

Document Name .... Document Composition

Department/Group .... Documentation

Revision Number .... Foundation EP5

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Overview

The Document Composition module allows organizations to generate and manage complex documents that are customized, error-free, and high-volume, all within OnBase. Users can automate the dynamic generation of documents based on configurable templates. These templates are the basis of documents. They can aggregate information from multiple sources, including user or database input, scripts, WorkView attributes, E-Form data, images, Keyword Values, or other values stored in OnBase. Templates are created directly in Microsoft Word.

Once configured, templates can be used to create new documents based on information already stored in OnBase. Users can preview or edit these documents after creation. Documents can be stored in OnBase or e-mailed to recipients.

VBScripts or Workflow can be used to automate the document creation process.

Enterprise Document Composition functionality can automatically compose and store documents in OnBase. A server runs the Unity Scheduler, allowing the Document Composition Service to processes requests and store the documents.

Applications

Organizations are looking to improve efficiency surrounding documents they regularly create. They need the ability to standardize the creation and storage of dynamically generated documents based on OnBase data. Document Composition provides control over document creation by centralizing document templates in OnBase, dynamically merging information from disparate data sources, and specifying edit, save, and e-mail options on final documents.

For example, an insurance company has a department that handles car accident claims for individual customers. When a claim is made, forms are created, using information from records that have already been stored in OnBase. Information may include customer name, Social Security number, make and model of the car, license plate number, and the site of the accident.

Forms must be generated using this information. The same information is used repeatedly. These forms include the following: Acknowledgement letter, Rental Rights letter, Auto Appraiser Assigned letter, Delay letter, Status letter, Approval letter, and Denial letter.

By creating templates with Document Composition, users working in this department can automatically generate documents for the specific types of letters based on the Placeholders that were configured in the template.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Document Composition 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 2.
- If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 2.

Simplified Licensing

The Essential User, Standard User, or Premier User license is required.

In addition to a base package license for standard OnBase functionality, the Document Composition & Packaging add-on license is required to access standard Document Composition functionality.

Legacy Licensing

A Document Composition license is required to manually generate documents. A valid Client license is also required.

An Enterprise Document Composition license is required for Enterprise Document Composition. A Document Composition license is included with the Enterprise Document Composition license.

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

OnBase® Foundation EP5

Document Composition

Installation Guide

Foundation EP5

Requirements

The following sections outline requirement information specific to Document Composition in OnBase Foundation EP5.

General Requirements

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

- Database Requirements
- Supported Desktop Operating Systems
- Microsoft .NET Framework Requirements

Note: These .NET requirements apply to all workstations using and configuring Document Composition, including the server that will be used to manage Enterprise Document Composition requests.

- Microsoft Visual C++ Requirements
- Web Client Browser Requirements (when using Document Composition with the Web Client)
- Unity Client Browser Requirements (when using Document Composition with the Unity Client)
- Client Retrieval Workstation Hardware Requirements
- Web Client Hardware Requirements (when using Document Composition with the Web Client)
- Unity Client Platform Hardware Requirements (when using Document Composition with the Unity Client)
- Miscellaneous Requirements

Hyland Dekstop Host Requirements

The Hyland Desktop Host must be installed if documents are to be previewed or edited during composition in the HTML-only Web Client.

Note: For more information on installing the Hyland Desktop Host, see the **Web Server** module reference guide.

Third-Party Software Requirements

A supported version of Microsoft Word must be installed on workstations that will be configuring Document Composition and/or generating documents with the OnBase Client, Web Client, and Unity Client.

Note: Additional Microsoft components must be installed on workstations configuring Document Composition. For more information on these components, see Pre-Installation on page 6.

Licensing

See Licensing on page 1 for licensing requirements.

Load Balancing

This module supports load balancing across multiple Web Servers and Application Servers. Load balancers must support either IP-based or cookie-based load balancing (also referred to as layer-3, layer-4, and layer-7 load balancing). Load balancers also must be configured to use persistent session (or sticky session) load balancing. For information about configuring your load balancer, refer to its documentation. For information about configuring OnBase modules for load balancing, refer to the Web Server module reference guide.

Limitations

When using cookie-based load balancing, the **HttpOnly** attribute in cookies must be set to **false**.

Upgrade Considerations

The following upgrade considerations have been compiled by OnBase subject matter experts. These upgrade considerations are general and applicable to most OnBase solutions and network environments and should be considered each time an upgrade is performed.

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

For additional general information about upgrading OnBase, refer to the Upgrade Guidelines reference manual, and visit the Hyland Community at: https://www.hyland.com/community.

The following information regarding Document Composition should be considered or noted prior to upgrading your version of OnBase:

- If you are upgrading from a version of OnBase prior to OnBase 18, to prevent formatting duplication, remove workarounds for manually placing currency or masking formatting in templates.
- Prior to the release of OnBase Foundation EP1, Placeholders configured to use the **Code 128** Bar Code display style used the **EAN-128** bar code format. As of OnBase Foundation EP1, The **Code 128** and **EAN-128** bar code formats are available as separate Bar Code display styles. If you are upgrading from a version of OnBase prior to OnBase Foundation EP1, the Bar Code display style of any Placeholder configured to use the **Code 128** bar code format will automatically update to correctly reflect the **EAN-128** bar code format.
- If you are upgrading from a version of OnBase prior to Foundation EP2, you must uninstall the previous version of the Document Composition Service. Also, any firewall settings configured to accommodate of the previous version of the Document Composition must be updated to accommodate the Unity Scheduler.
- Beginning in OnBase Foundation EP4, the Document Composition ActiveX controls are no longer supported and have been removed from the Document Composition module. If you are using Document Composition in the ActiveX Web Client and upgrading to OnBase Foundation EP5, you must use Document Composition in the HTML Web Client to fulfill your needs.

Pre-Installation

Microsoft Visual Studio 2010 Tools for Office Runtime must be installed on client machines prior to deployment. **Microsoft Visual Studio 2010 Tools for Office Runtime** can be obtained from the Microsoft Download Center at http://www.microsoft.com/downloads. The x86 version is required for 32-bit versions of Windows; the x64 version is required for 64-bit versions of Windows.

Note: Microsoft Visual Studio 2010 Tools for Office Runtime can also be installed by the **Hyland Office Integration Dependencies** installer for ClickOnce deployments, or by using setup.exe to run the MSI installer for the Office Business Application module.

Installing Document Composition

The OnBase Client and the Unity Client do not require any installation steps to use Document Composition. When using Document Composition with the HTML-only Web Client, the Hyland Desktop Host is required if documents are to be previewed or edited during composition.

The Template Builder is the configuration component for Document Composition. The Template Builder is installed using the Hyland Office Products Installer. For more information on running this installer, see Hyland Office Products Installers on page 25.

In order to install Enterprise Document Composition, you must configure the Document Composition Service. The Document Composition Service can be used with both Enterprise Document Composition and Document Composition.

ADO.NET Connection Strings

The default database connection method for OnBase servers and applications requires ADO.NET connection strings. An ODBC connection is still required for the OnBase Client and the OnBase Configuration module.

A connection string contains the information required to connect to a database, and each connection string has a unique identifying name for that data source connection. This unique data source name is referenced by other applications to connect to the database configured in the connection string.

Data source connection strings are configured in the configuration file of the application used to connect directly to the database. For example, the **connectionStrings** element in the Application Server web.config file contains a data source connection string for each database that the Application Server accesses. Other applications using the Application Server, such as the Unity Client or Web Server, access the database by referencing the unique data source name from the relevant connection string.

This section includes the following information for connection strings:

- Connection String Components on page 7.
- Managing Connection Strings Using The Web Application Management Console on page 11.

Connection String Components

This section explains the required components in an ADO.NET connection string used to connect an application to a database. Examples of connection strings are provided at the end of the section.

Note: ADO.NET and connection strings are Microsoft .NET Framework concepts, but each database provider (such as SQL Server or Oracle) has its own implementation of ADO.NET. For more information on building a valid connection string or using additional options, see your database provider’s documentation on connection strings.

It is important to note the following considerations for connection strings:

- It is strongly recommended to use integrated security instead of a database account for authentication. To use integrated security, the Windows user connecting to the database must be the same user that is running the connecting server or service (such as the Application Server). This user must also be configured with the **configgp** role in the database.
- It is strongly recommended to encrypt the connection strings. If they are not encrypted, all data source connection information is visible in the .config file, including the database user names and passwords in the connection strings.

  Encryption can be performed using the **aspnet_regiis** command line utility for IIS or using Web Application Management Console. See the documentation from Microsoft for more information on using the ASP.NET IIS Registration Tool. See the **Web Application Management Console** module reference guide for more information on encrypting connection strings using the OnBase Web Application Management Console.

See the following subsections for information on each element of a connection string:

- Name on page 8
- ConnectionString on page 8
- ProviderName on page 9

For examples of connection strings for all supported database platforms, see Connection String Examples on page 10.

Name

The **name** element is a unique name that you create to identify the data source connection string.

Note: This identifying name may be different from the name of the actual database, which is specified in the **Data Source** and **database** attributes.

Example:

```
name="DataSourceName"
```

ConnectionString

The **connectionString** element contains connection information for the database. The tokens needed for the connection information depend on the database platform used.

SQL Server Connection String Tokens

Use the following connection string tokens in the **connectionString** element when using a SQL Server database.

Token	Description
Data Source	The server\instance name of the SQL Server instance hosting the database.

Token	Description
Database	The name of the database in SQL Server.
User Id	The user name of the user account accessing the database. This is a database user account, not a user account in OnBase. **Note:** If using integrated security, the **User Id** token is not used.
Password	The password of the user account accessing the database. This is a database user account, not a user account in OnBase. **Note:** If using integrated security, the **Password** token is not used.
Integrated Security	A **true** or **false** value specifying whether to use integrated security to access the database.

Oracle Connection String Tokens

Use the following connection string tokens in the **connectionString** element when using an Oracle database.

Token	Description
Data Source	The TNS name or connect descriptor of the database.
User Id	The user name of the user account accessing the database. This is a database user account, not a user account in OnBase. **Note:** If using OS Authentication, enter a forward slash in place of the user name. For example: `User Id=/`
Password	The password of the user account accessing the database. This is a database user account, not a user account in OnBase. **Note:** If using OS Authentication, the **Password** token is not used.

ProviderName

The **providerName** element specifies the data provider type used for the database. Only SQL Server and Oracle data providers can be used to connect to the OnBase database.

Note: Values for the **providerName** element are case-sensitive.

Use one of the following, depending on the database platform used:

Database Platform	ProviderName Element
SQL Server	`providerName="System.Data.SqlClient"`
Oracle	`providerName="Oracle.ManagedDataAccess.Client"`

Connection String Examples

The following sections provide examples of connection strings for SQL Server and Oracle.

Note: The following examples are provided for illustration purposes only. Each database provider has its own implementation of ADO.NET and connection strings, and your particular situation may require including different or additional options than the ones illustrated in these examples. For more information on building a valid connection string or using additional options, see your database provider's documentation on connection strings.

SQL Server Examples

This connection string would create a data source called **ConnectSQL**, used to connect to the database **TestDB** hosted on a SQL Server instance named **Serv001\instance**:

```
<connectionStrings>
   <add name="ConnectSQL" connectionString="Data Source=Serv001\instance;
   Database=TestDB;User Id=username;Password=password"
   providerName="System.Data.SqlClient"/>
</connectionStrings>
```

Similarly, this example would connect to the same database, but it would use integrated security instead of database user authentication:

```
<connectionStrings>
   <add name="ConnectSQL" connectionString="Data Source=Serv001\instance;
   Database=TestDB;Integrated Security=true;"
   providerName="System.Data.SqlClient"/>
</connectionStrings>
```

Oracle Examples

This connection string would create a data source is called **ConnectOracle**, used to connect to the Oracle database **TestDB**:

```
<connectionStrings>
   <add name="ConnectOracle" connectionString="Data Source=TestDB;
   User Id=username;Password=password"
   providerName="Oracle.ManagedDataAccess.Client"/>
```

```
</connectionStrings>
```

Similarly, this example would connect to the same database, but it would use OS Authentication instead of database user authentication:

```
<connectionStrings>
   <add name="ConnectOracle" connectionString="Data Source=TestDB;
   User Id=/" providerName="Oracle.ManagedDataAccess.Client"/>
</connectionStrings>
```

The following example would connect to the same database, but it uses the connect descriptor for the Oracle database:

```
<connectionStrings>
   <add name="ConnectOracle"
   connectionString="Data Source=(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP)
   (HOST=hostname)(PORT=1521))(CONNECT_DATA=(SERVICE_NAME=TestDB)));
   User Id=username;Password=password"
   providerName="Oracle.ManagedDataAccess.Client"/>
</connectionStrings>
```

Managing Connection Strings Using The Web Application Management Console

You can use the Web Application Management Console to create, modify, and delete data source connection strings to connect to the OnBase database. This utility also allows you to encrypt all of the connection string information in the configuration file for security purposes.

Note: ADO.NET and connection strings are Microsoft .NET Framework concepts, but each database provider (such as SQL Server or Oracle) has its own implementation of ADO.NET. For more information on building a valid connection string or using additional options, see your database provider's documentation on connection strings.

It is important to note the following considerations for connection strings:

- It is strongly recommended to use integrated security instead of a database account for authentication. To use integrated security, the Windows user connecting to the database must be the same user that is running the connecting server or service (such as the Application Server). This user must also be configured with the **configgp** role in the database.
- It is strongly recommended to encrypt the connection strings. If they are not encrypted, all data source connection information is visible in the configuration file, including the database user names and passwords in the connection strings.

The following sections apply to managing connection strings using the Web Application Management Console:

- Creating a Connection String on page 12.
- Modifying a Connection String on page 17.
- Deleting a Connection String on page 19.

Creating a Connection String

You can use the Web Application Management Console to create and encrypt data source connection strings.

To create a new connection string:

1. In the Web Application Management Console, open the Application Server web.config file by clicking **Open Web Application** and selecting the Application Server from the list of web applications.

Note: Opening the Application Server web.config file is required to access the connection strings configuration utility, even if you are not configuring the Application Server.

2. Select **Connection Strings | View Contexts**. The connection strings dialog box is displayed.

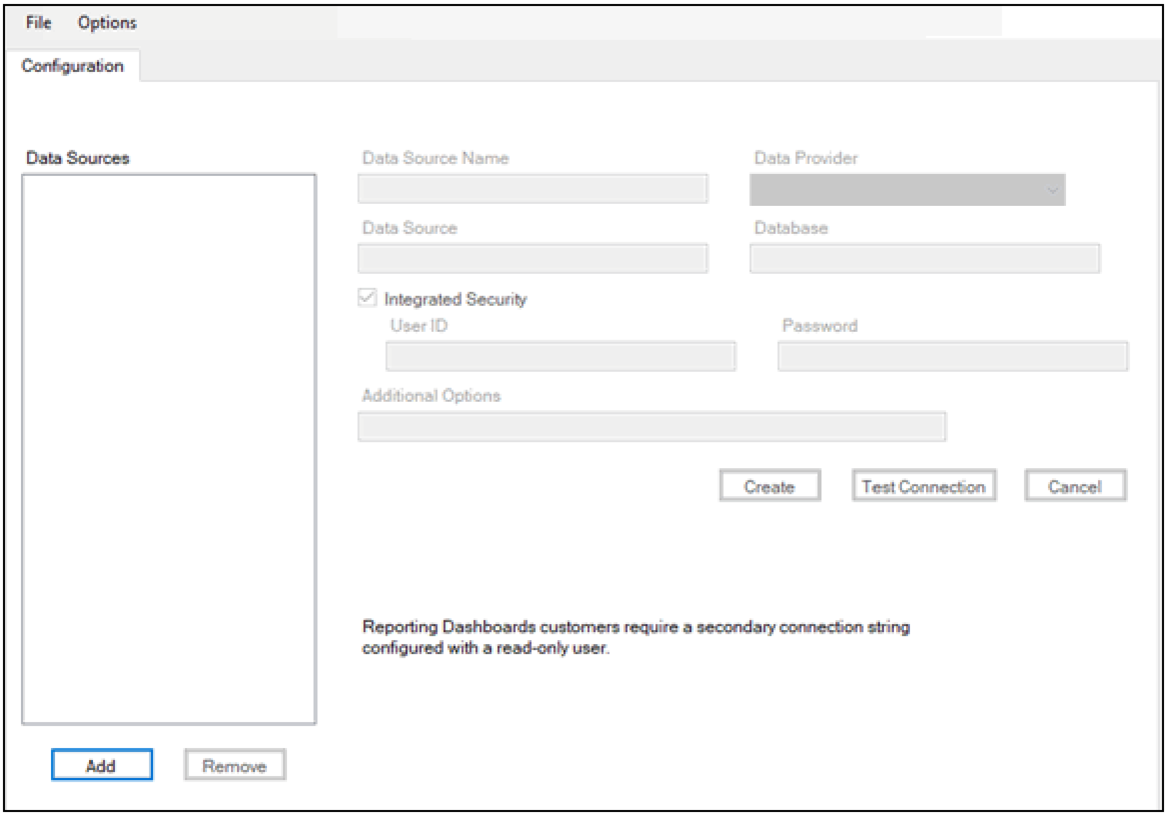
   If you are configuring an application or service other than the Application Server, follow these additional steps to open the appropriate .config file:

   a. Select **File | Configuration Path**.

   b. Browse to open the .config file for the application or service.

Note: You can also apply the **-CONFIGPATH** command line switch to the Web Application Management Console shortcut to directly open a .config file in the connection strings dialog box. See the command line switches section of the **Web Application Management Console** documentation for more information.

The connection strings dialog box allows you to configure connection strings.



3. To encrypt all connection strings configured in the application's .config file, ensure the **Options | Encrypt Connection Strings** menu option is selected. This option is automatically selected by default every time you open the connection strings dialog box, and the connection strings are encrypted when the .config file is saved.

Caution: It is strongly recommended to encrypt the connection strings. If they are not encrypted, all data source connection information is visible in the .config file and could expose sensitive data, including any entered database user names and passwords.

4. Click **Add** to start creating a new connection string. The fields on the right become available for interaction.
5. If you are configuring Reporting Dashboards with a secondary connection string with a read-only database user account, select **Options | Populate Read-Only User**. This optional feature populates the **User ID** and **Password** fields with the credentials for the read-only user. See the **Reporting Dashboards** documentation for more information.

   If you are creating a connection string for any other purpose, skip this step.

6. In the fields on the right, enter the following information about the data source:

Option	Description
Data Source Name	A unique name that you create to identify the connection string. **Note:** This identifying name may be different from the name of the actual database.
Data Provider	The data provider type used for the database. Select one of the following: • **System.Data.SqlClient**: Select this for a SQL Server database. • **Oracle.ManagedDataAccess.Client**: Select this for an Oracle database. **Note:** Only SQL Server and Oracle data providers can be used to connect to the OnBase database.

7. Depending on your selection for **Data Provider** in the previous step, enter the following database connection information:
   - If **System.Data.SqlClient** is selected (for a SQL Server database):

System.Data.SqlClient Option	Description
Data Source	Enter the server\instance name of the SQL Server instance hosting the database.
Database	Enter the name of the SQL Server database.

   - If **Oracle.ManagedDataAccess.Client** is selected (for an Oracle database):

Oracle.ManagedDataAccess.Client Option	Description
TNS Connection String	Select this option to enter a full TNS connection string to connect to the Oracle database. Deselect the option to use the connection name instead. **Note:** Selecting this option enables the **Host**, **Database**, **Protocol**, and **Port** fields for interaction.
Data Source	Enter the TNS name or connect descriptor of the Oracle database. **Note:** This field is available only if the **TNS Connection String** option is deselected.

Oracle.ManagedDataAccess.Client Option	Description
Host	Enter the host address of the Oracle database.
Database	Enter the name of the Oracle database.
Protocol	Select the protocol to use for connecting to the Oracle database. Options are: • **TCP** • **TCPS**
Port	Enter the port to use for connecting to the Oracle database.

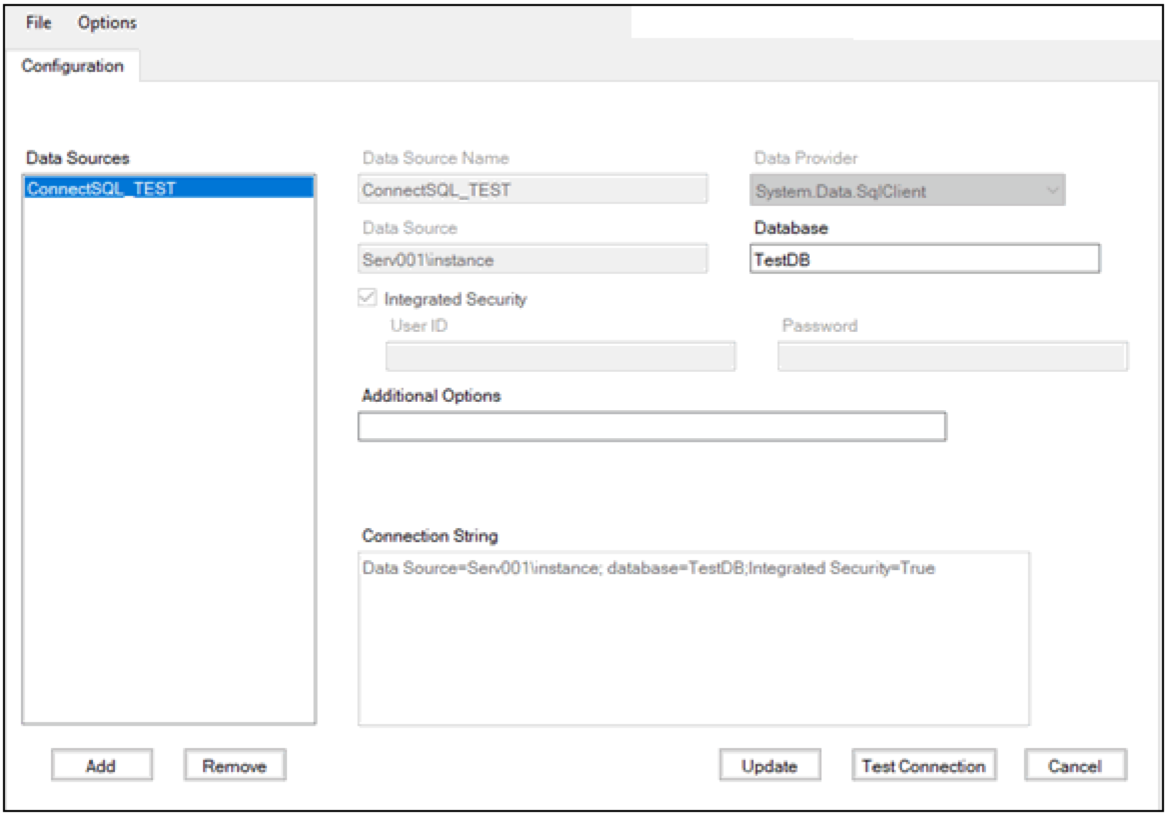
8. Enter the following security information:

Option	Description
Integrated Security	Select this option to use Windows Authentication to connect to the database. **Caution:** It is strongly recommended to use integrated security instead of a database account for authentication. To use integrated security, the Windows user connecting to the database must be the same user that is running the connecting server or service (such as the Application Server). This user must also be configured with the **configgp** role in the database.
User ID	The user name of the database user account accessing the database. **Note:** This user name is for a database user account, not a user account for OnBase.
Password	The password of the database user account accessing the database. **Note:** This password is for a database user account, not a user account for OnBase.

9. Enter any additional options.

Option	Description
Additional Options	Any additional options for the connection string. For more information on available connection string options and syntax, see the documentation for your database provider (SQL Server or Oracle).

10. Click **Test Connection** to test whether the entered information forms a valid connection string.
11. Click **Create** to save the information in the fields and create the connection string. The name of the data source is added to the **Data Sources** list on the left, and the connection string is displayed in the **Connection String** section.



12. Select **File | Save** to save the .config file.
13. Select **File | Close** to exit the connection strings dialog box.

Modifying a Connection String

If you have already created a connection string in the .config file, you can use the Web Application Management Console to make changes to the data source connection information in the connection string.

To modify a connection string:

1. In the Web Application Management Console, open the Application Server web.config file by clicking **Open Web Application** and selecting the Application Server from the list of web applications.

Note: Opening the Application Server web.config file is required to access the connection strings configuration utility, even if you are not configuring the Application Server.

2. Select **Connection Strings | View Contexts**. The connection strings dialog box is displayed.

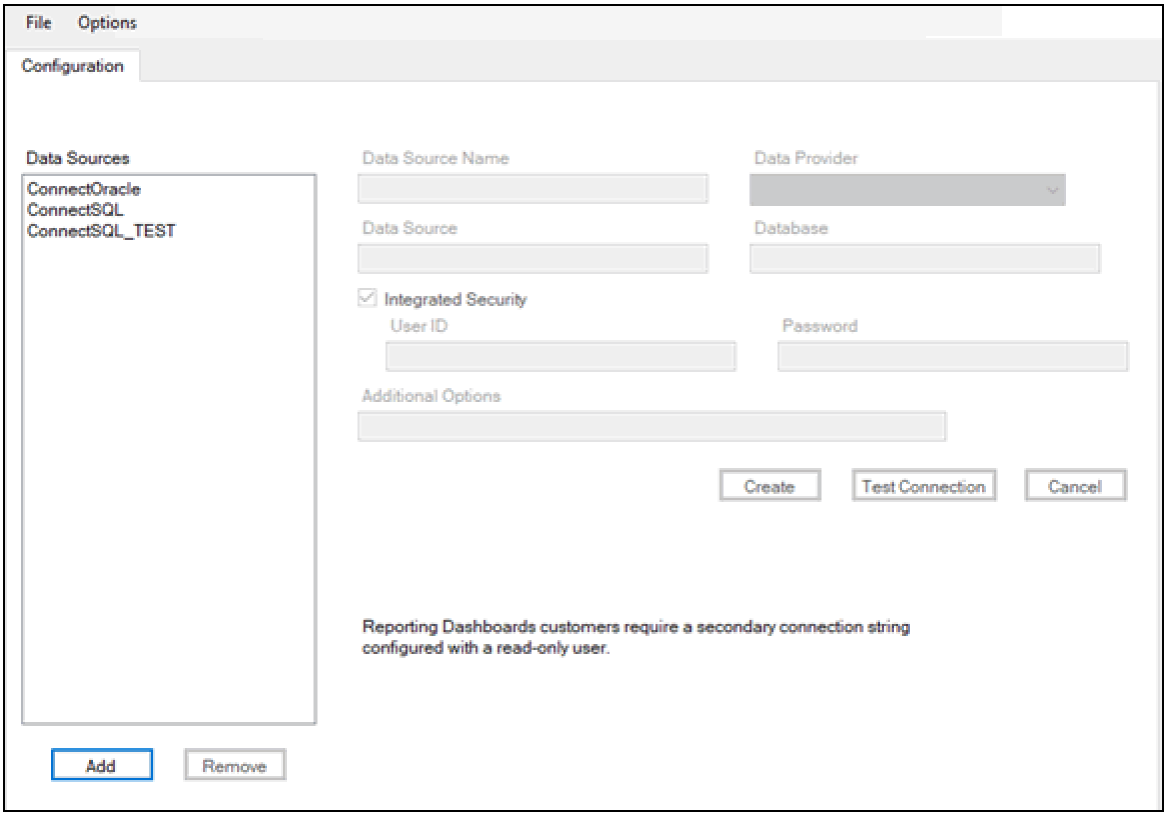
   If you are configuring an application or service other than the Application Server, follow these additional steps to open the appropriate .config file:

   a. Select **File | Configuration Path**.

   b. Browse to open the .config file for the application or service.

Note: You can also apply the **-CONFIGPATH** command line switch to the Web Application Management Console shortcut to directly open a .config file in the connection strings dialog box. See the command line switches section of the **Web Application Management Console** documentation for more information.

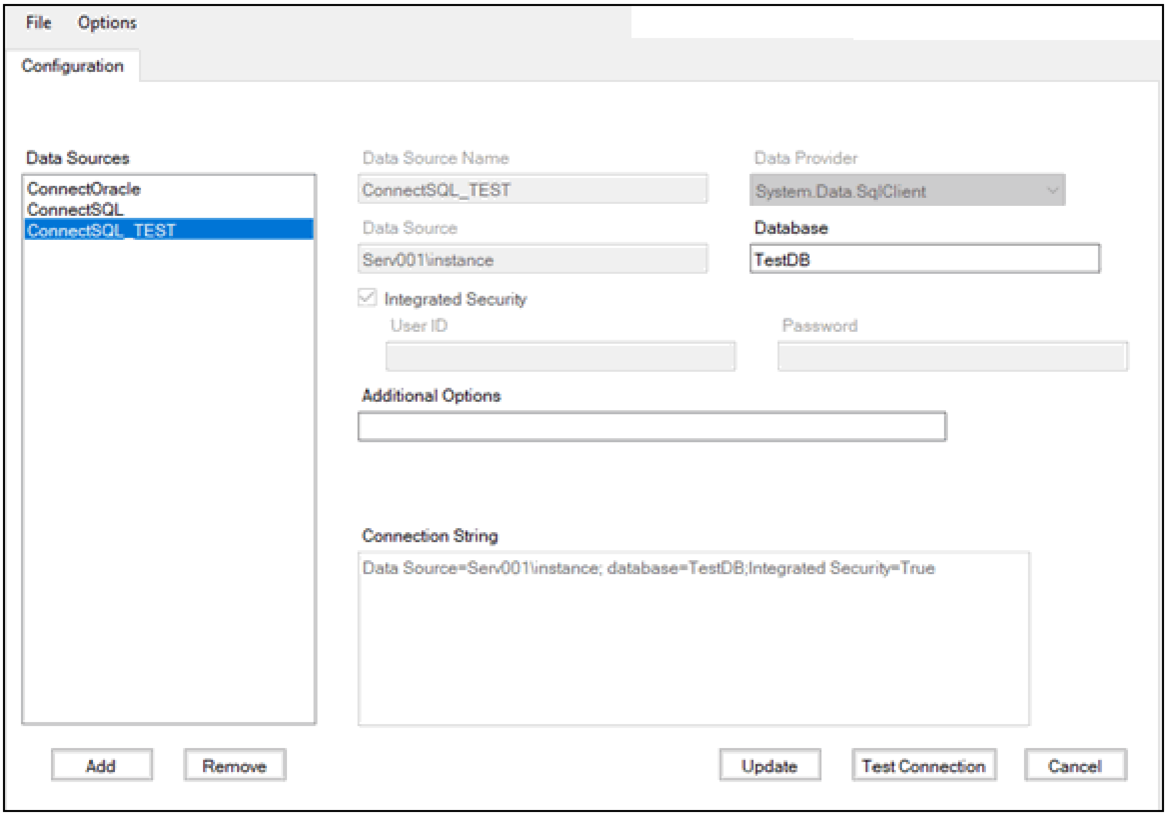
The connection strings dialog box allows you to configure connection strings.



3. To encrypt all connection strings configured in the application's .config file, ensure the **Options | Encrypt Connection Strings** menu option is selected. This option is automatically selected by default every time you open the connection string dialog box, and the connection strings are encrypted when the .config file is saved.

Caution: It is strongly recommended to encrypt the connection strings. If they are not encrypted, all data source connection information is visible in the .config file and could expose sensitive data, including any entered database user names and passwords.

4. Select the item you want to modify in the **Data Sources** list. The configured connection string information for that data source is displayed in the fields on the right.



5. Modify the connection string fields and options as needed.
6. Click **Test Connection** to test whether the entered information forms a valid connection string.
7. Click **Update** to save the changes to the connection string.
8. Select **File | Save** to save the .config file.
9. Select **File | Close** to exit the connection strings dialog box.

Deleting a Connection String

You can use Web Application Management Console to delete a data source connection string from the .config file.

To delete a connection string:

1. In the Web Application Management Console, open the Application Server web.config file by clicking **Open Web Application** and selecting the Application Server from the list of web applications.

Note: Opening the Application Server web.config file is required to access the connection strings configuration utility, even if you are not configuring the Application Server.

2. Select **Connection Strings | View Contexts**. The connection strings dialog box is displayed.

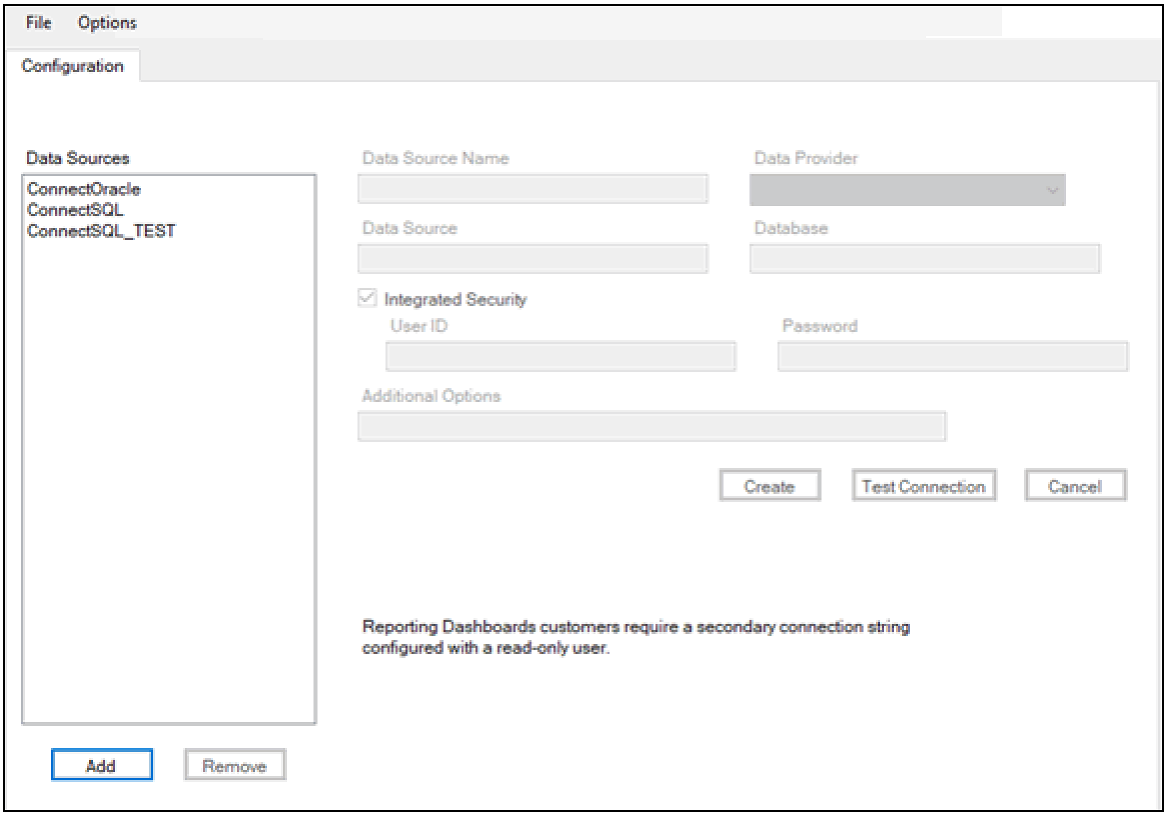
   If you are configuring an application or service other than the Application Server, follow these additional steps to open the appropriate .config file:

   a. Select **File | Configuration Path**.

   b. Browse to open the .config file for the application or service.

Note: You can also apply the **-CONFIGPATH** command line switch to the Web Application Management Console shortcut to directly open a .config file in the connection strings dialog box. See the command line switches section of the **Web Application Management Console** documentation for more information.

The connection strings dialog box allows you to remove connection strings.



3. Select the item you want to delete from the **Data Sources** list.
4. Click **Remove**. The data source is removed from the list.
5. Select **File | Save** to save the .config file.
6. Select **File | Close** to exit the connection strings dialog box.

Command Line Switches and INI Settings

INI File

INI files (initialization files) are plain-text files that contain configuration information. These files are used by Windows and Windows-based applications to save and access information about your preferences and operating environment. OnBase uses an initialization file named onbase32.ini. If users do not have rights to access the onbase32.ini file, they will be unable to use the Client or the Configuration module.

The onbase32.ini file is primarily used to store settings specified in the Client or the Configuration module. For example, when a user selects a default data source in the OnBase Client's Workstation Options dialog box, this selection is saved to the onbase32.ini file. The onbase32.ini file is also used to make modifications to OnBase modules that cannot be made through the module's interface.

Location

For modern Windows operating systems, the default location of the onbase32.ini file is **C:\ProgramData\Hyland Software**. For previous versions of OnBase running on older operating systems, the default location of the onbase32.ini file was **C:\Documents and Settings\All Users\Application Data\Hyland Software**.

Note: To maintain backwards compatibility with previous versions of OnBase, OnBase checks the workstation's **C:\Windows** folder for the OnBase INI file if it is not found in the folder specified above. If the OnBase INI file is found in the **C:\Windows** folder, OnBase copies the file to the new location. The previously existing version of the OnBase INI file remains in the **C:\Windows** folder, but it is no longer used by OnBase.

Your onbase32.ini file may reside in a different location, if that location is specified by the following command line switch on the OnBase Client shortcut target:

-INIFILE= "full path\filename", where **full path** and **filename** are replaced by the specific path and file name.

If this command line switch is not used and you move or rename your onbase32.ini file, OnBase recreates the file in the default folder and ignores the newly created file.

INI Considerations in a Citrix and Microsoft Windows Remote Desktop Environment

In Remote Desktop environments, a remote session is established in which the user is running applications that are not installed locally. This presents a challenge when an application, such as OnBase, requires a user-specific INI file to establish unique settings. In a Remote Desktop environment, you must ensure that each user has a single, unique INI file to make sure any user-specific settings are consistent for that user.

Note: The default location of the OnBase INI file is not unique in a Remote Desktop environment.

To ensure that the INI file is accessible by OnBase and unique to each user in a Remote Desktop environment, the **-INIFILE** command line switch must be applied to the OnBase Client and Configuration shortcuts and be set to a unique location for the INI file.

Note: Additional details regarding the deployment of OnBase in a remote desktop environment is discussed in detail in the **Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide**, available from your first line of support.

Editing the INI File

Users with the **Configuration** product right can open the onbase32.ini file from the OnBase Client by selecting **Admin | Utilities | Edit INI File**. When multiple onbase32.ini files exist, opening the onbase32.ini file from the OnBase Client ensures that a user is editing the correct onbase32.ini file instance. In most cases, this will be the onbase32.ini file residing in the default directory described above. If an alternate location for the onbase32.ini file is specified by the **-INIFILE** command line switch, the file in the specified location will be opened.

Troubleshooting

1. **I successfully installed Document Composition, but the Template Builder tab is not displayed when I launch Word.**

   Enable and load the Document Composition add-in:

   a. In Word, click the Office button.
   b. Select **Add-ins**.
   c. Select **Disabled Items** from the **Manage** drop-down list.
   d. Click **Go**.
   e. If the Document Composition add-in is included in the **Disabled Items** dialog box, select it and click **Enable**.
   f. The Document Composition add-in is enabled.
   g. Select **Add-ins**.
   h. Select **COM Add-ins** from the **Manage** drop-down list.
   i. Click **Go**.

j. Select the check box next to the Document Composition add-in in the **COM Add-Ins** dialog box, and click **OK**.

k. The Document Composition add-in is loaded.

2. **The Diagnostics Console displays a message stating, "System.IO.IsolatedStorage.IsolatedStorageException: Unable to open the store."**

   This issue can occur when attempting to create a document using a large template (i.e., hundreds of pages), or if a template creates a large document. It is caused by an issue in the .NET Framework. To resolve this issue, enable Impersonation on the Application Server. If Enterprise Document Composition is being used, the Composition Service should be configured to run as a user instead of as **SYSTEM**.

3. **How do I modify the service location I specified during Template Builder installation?**

   Edit **Hyland.Office[year].DocumentComposition.Config.dll.config**. In a typical MSI installation, this file is located in C:\Program Files\Hyland\Office Integration\Office [year] (32-bit operating systems) or C:\Program Files(x86)\Hyland\Office Integration\Office [year] (64-bit operating systems).

4. **When composing a document and storing it as a PDF or TIFF, some Word features (for example, art page borders) are not displayed on the composed document.**

   Document Composition does not support the use of all Word features when composed documents are stored as PDF or TIFF. If Word features are not displayed on composed documents being stored as a PDF or TIFF, store the composed document as a Word document (.docx).

5. **How do I resolve the "There was an error in gathering Field Information selected Field" error, which occurs when upgrading a database that is licensed for Document Composition and WorkView?**

   Upgrade the OnBase database, install and run WorkView Configuration, and install Document Composition.

6. **When configuring a new template with a Metadata Placeholder, the Document Type and Keyword Type drop-down lists on the Placeholder Input screen are both empty.**

   This occurs because of the fact that WorkView attributes can be used as Placeholders. If the WorkView database tables are not present in the database, none of the Document Types or Keyword Types will display unless the WorkView tables have been created in the OnBase database. To resolve this issue, install and run WorkView Configuration to create the WorkView tables in the OnBase database. After creating the WorkView tables, close and re-open Microsoft Word, and then re-launch the Template Builder.

7. **When composing a PDF or TIFF document using a Document Composition template, tables within the document overlap surrounding tables, images, and/or text.**

   This issue may be a result of one or more tables in the template using the **Around** text wrapping table property. To change this, open the template in the Template Builder and right-click the appropriate table. Select **Table Properties** and select the **None** property for **Text Wrapping**. Do this for each overlapping table.

   You can also try adjusting the spacing in between the tables to solve the issue if you do not want to change the table properties.

8. **When using the AscW VBScript function, negative values are returned when asking for the Unicode value of a non-Latin character. This negative number is then composed onto a document at runtime rather than the desired Unicode character.**

   Microsoft has acknowledged this is a known issue. For more information on how to work around this issue, refer to Microsoft KB article 272138 (http://support.microsoft.com/kb/272138/en).
9. **When using C/WScript to run VBScripts, an error message is displayed.**

   This issue occurs if the script file is UTF-8 encoded. UTF-8 encoded script files are not supported when using C/WScript to run VBScripts. When using C/Scripts to run VBScripts, UTF-16 encoded script files must be used.
10. **When opening a template, the following message is displayed: "This template contains a VBScript that may reference the DMCoreX API. If it does, the script will no longer function. Please contact your first line of support for more information."**

    This occurs when the opened template contains a VB Script, and the system determines the VB Script may be using the DMCoreX API. The DMCoreX API has been deprecated. Therefore, VB Scripts using this API no longer run during document composition. This does not affect whether a document is successfully composed. For more information on VB Scripts using the DMCoreX API, contact your first line of support.
11. **When changing Windows display settings, Template Builder dialog boxes are only partially displayed.**

    After changing Windows display settings, you must sign out of Windows and sign back in for the changes to take affect in the Template Builder.

Overview

The Hyland Office Products installers are used to install the OnBase integration modules for Microsoft Office.

The following functionality is included in the installers and can be installed independently of each other:

- Office Add-In for Microsoft Word
- Office Add-In for Microsoft PowerPoint
- Office Add-In for Microsoft Excel
- Report Services Excel Add-In for Microsoft Office
- Integration for Microsoft Outlook
- WorkView Integration for Microsoft Outlook
- Template Builder

For complete details regarding the functionality and configuration of any of the modules included in the Hyland Office Products Deployment installer, or for any additional installation steps required to install and use the module on the client machine, refer to the module reference guide for that module.

Note: If you would like to include a default Auto Import folder configuration with Microsoft Outlook deployments, see Outlook Folder Configuration Utility on page 61 before running the installer.

Deployment Options

The Hyland Office Products installer is distributed as a ClickOnce deployment installer or as a standard executable installer (MSI). While either installer can be used to install the same functionality, the following differences should be considered when deciding which installation option is best for your organization:

ClickOnce installer	Standard (MSI) installer
After running the **Hyland Office Products Deployment** installer you must run the separate **Hyland Office Integration Dependencies** installer on each workstation before the packages are deployed to those workstations. This installer installs the prerequisites required to use the Office and Outlook integration modules on the client workstations. These prerequisites are not included in the deployment packages and cannot be deployed using ClickOnce.	Prerequisites are installed automatically as long as the **setup.exe** executable is used for installation.
Deployment packages can be installed on the local workstation by any user with rights sufficient to access the deployment package on the deployment server.	The installer must always be run on the local workstation by a user who is an Administrator on that workstation.
Deployment packages can be updated to a new version without first uninstalling the module from each workstation. The new version is automatically updated on each workstation the next time the module is accessed.	In order to upgrade to a new version, the old version must be uninstalled from each workstation before the new version can be installed.
Microsoft Office documents opened using the Web Client cannot be revised using the Office Business Application modules if those modules were deployed using ClickOnce.	Microsoft Office documents opened using the Web Client can be revised using the Office Business Application modules if those modules were installed using the standard (MSI) installer.
A new instance must be created for different language and culture settings, and those settings are applied to all users who access that deployment instance.	Language and culture settings can be changed for each workstation installed to.
Document Templates cannot be used in the Web Client with the Office Business Application modules if those modules are installed using the ClickOnce installer.	Document Templates can only be used in the Web Client with the Office Business Application modules when those modules are installed using the standard installer (MSI).

ClickOnce installer	Standard (MSI) installer
The ClickOnce installer cannot be used to install the 64-bit Hyland Office add-ins.	The 64-bit versions of the Hyland Office add-ins for Microsoft Office can be installed using the standard installer (MSI) for 64-bit environments.

Note: You cannot install some components using ClickOnce and others using the standard (MSI) installer. Once you have installed a component, that same deployment method must be used to install additional components.

This chapter covers installation using either method:

- Installation Using ClickOnce on page 30
- Installation Using the Standard (MSI) Installer on page 69

Microsoft Office 2019 Support Statement

While OnBase supports the 32-bit and 64-bit versions of Microsoft Office 2019, Hyland Software recommends that customers only install the 32-bit version of Microsoft Office 2019. For most users, the 64-bit version of Microsoft Office 2019 does not provide additional performance benefits.

Microsoft provides the following guide to assist with choosing the correct version of Microsoft Office for your organization (http://support.office.com/en-us/article/Choose-the-32-bit-or-64-bit-version-of-Office-2dee7807-8f95-4d0c-b5fe-6c6f49b8d261?CorrelationId=165c464e-6fb1-4532-83ad-7537787fd680&ui=en-US&rs=en-US&ad=US).

Separate versions of the Office Business Application for 2019 and Integration for Microsoft Outlook 2019 modules are available that support the 64-bit version of Microsoft Office 2019. The 64-bit versions of these modules have limited functionality, though, due to some components which are not 64-bit compatible.

The following are limitations when using the 64-bit versions of the Office Business Application for 2019 and Integration for Microsoft Outlook 2019 modules:

- The ClickOnce installer is not supported.
- The embedded Unity Document Viewer cannot display Microsoft Office documents. The Office Business Application for 2019 will be used to open all Microsoft Office documents. The Office Business Application for 2019 is required to view Microsoft Office documents from the Integration for Microsoft Outlook 2019.
- Topaz signature pad functionality, which is part of the Signature Pad Interface module, is not available.
- Document scanning and acquisition is not available.
- The Document Composition preview window, which may be displayed after composing a new document using the Document Composition module, is not available.

- **Send To | Mail Recipient** functionality using the Novell GroupWise email client is not available.

Caution: OnBase does not support mixed 32-bit and 64-bit Microsoft Office installations with the Office Business Application for 2019 and Integration for Microsoft Outlook 2019 modules.

Microsoft Office 365 Support Statement

In order for the OnBase Office integrations to function in a Microsoft Office 365 environment, the Office 365 subscription must include a desktop-based version of Microsoft Office that is also supported by OnBase. OnBase does not have any integrations for Office Online.

Office 365 subscribers are automatically updated to the latest version of Office when it becomes available. Before this update is applied, they must ensure that they are using a version of OnBase that supports this latest version of Office. At the same time, it is recommended that Office 365 subscribers contact their solution providers to discuss any licensing updates that may be required to support their Integration for Microsoft Outlook, Office Business Application, and WorkView Integration for Microsoft Outlook solutions on the latest version of OnBase.

Microsoft Updates to Microsoft Outlook

After applying a Microsoft update to Microsoft Outlook, the Auto-Import Folder Configuration information for the Integration for Microsoft Outlook can be lost. If this is the case, the integration tool bar and ribbon are still displayed, and ad-hoc importing is successful, but user-specific Auto-Import Folder Configuration options are missing.

This issue is caused by the installation of Outlook-specific updates from Microsoft. These updates cause a new sub-directory to be created within the original installation directory (in a ClickOnce deployment, this is the location of the deployed integration on the client machine, not on the deployment server). After the update, Outlook uses this new sub-directory as the location of the **user.config** file, which contains the user-specific Auto-Import Folder Configuration information. However, the new sub-directory does not contain the original Auto-Import Folder Configuration information for the user. Instead, a new default **user.config** file that contains no customized settings is used in place of the original.

To resolve this issue, copy the original **user.config** file from the original installation directory and paste it into the new sub-directory created by the Outlook update from Microsoft. After replacing the new **user.config** file with the original, user-specific file and re-launching Outlook, Auto-Import Folder Configuration should be restored.

In a ClickOnce deployment, where the Auto-Folder Configuration information is set in the deployment package and cannot be changed by users, you could also create an updated deployment package and redeploy the integration to the client machines.

Requirements

The Hyland Office Integrations installed require the OnBase Application Server. Before running the Hyland Office Products installer, make sure that the OnBase Application Server is installed (see the **Application Server** module reference guide for installation instructions).

The Hyland Office Products installer must be run on systems that support the Windows® Installer 2.0 architecture.

The following sections outline requirement information specific to Document Composition in OnBase Foundation EP5.

General Requirements

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

- Microsoft .NET Framework Requirements
- Server C++ Requirements

User Permissions

You must be logged on to the installation machine with administrator privileges in order to use the Hyland Office Products installer.

Note: The Hyland Office Products installer must be run with elevated administrator privileges, even if the user currently logged in is an administrator.

If you are installing a deployment package to be delivered to a client workstation using ClickOnce, any user on the client workstation can install the deployed package as long as they have sufficient rights to access the package on the deployment server.

Client Machine

Microsoft Visual Studio 2010 Tools for Office Runtime must be installed on client machines prior to deployment. **Microsoft Visual Studio 2010 Tools for Office Runtime** can be obtained from the Microsoft Download Center at http://www.microsoft.com/downloads. The x86 version is required for 32-bit versions of Windows; the x64 version is required for 64-bit versions of Windows.

Note: Microsoft Visual Studio 2010 Tools for Office Runtime can also be installed by the **Hyland Office Integration Dependencies** installer for ClickOnce deployments, or by using setup.exe to run the MSI installer for the Office Business Application module.

Installation Using ClickOnce

The **Hyland Office Products Deployment** installer is used to install the ClickOnce deployment packages for several modules on the deployment server (see Overview on page 25). The deployment package is then accessed by client machines to install the module on the client machine.

Note: After running the **Hyland Office Products Deployment** installer you must run the separate **Hyland Office Integration Dependencies** installer on each workstation before the Office integration packages are deployed to those workstations. This installer installs the prerequisites required to use the Office and Outlook integration modules on the client workstations. These prerequisites are not included in the deployment packages and cannot be deployed using ClickOnce. See Additional Installation on page 63.

The Hyland Office Products Deployment installer can be run from an installation CD or a local drive.

Note: You must be appropriately licensed for all modules and functionality installed. You can install, but cannot use, modules for which you are not licensed.

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\\""**.

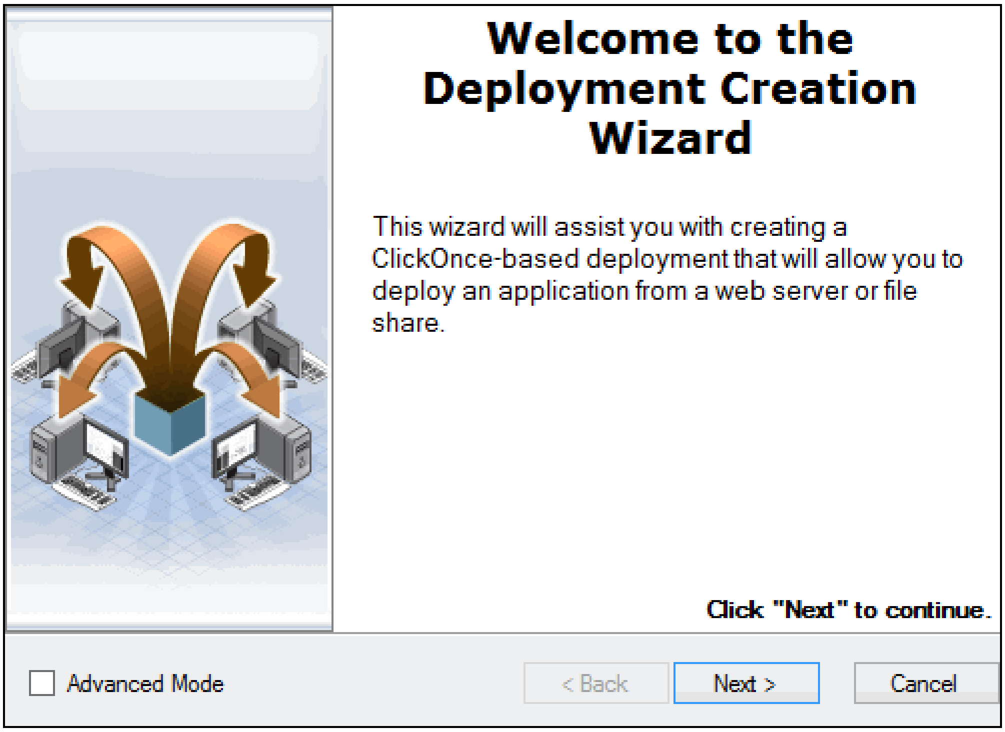
Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

General Installation Options

To run the Hyland Office Products Deployment Installer:

1. Execute setup.exe with administrator privileges. This can be done by right-clicking on the file name and selecting **Run as administrator**. This executable is usually located in the **\ClickOnce\Office Products** folder of your source installation files.
2. The **Ready to Install** dialog box is displayed. Click **Install**.

3. Click **Launch** or **Finish**, depending on the module being installed. The **Welcome to the Deployment Creation Wizard** dialog is displayed.



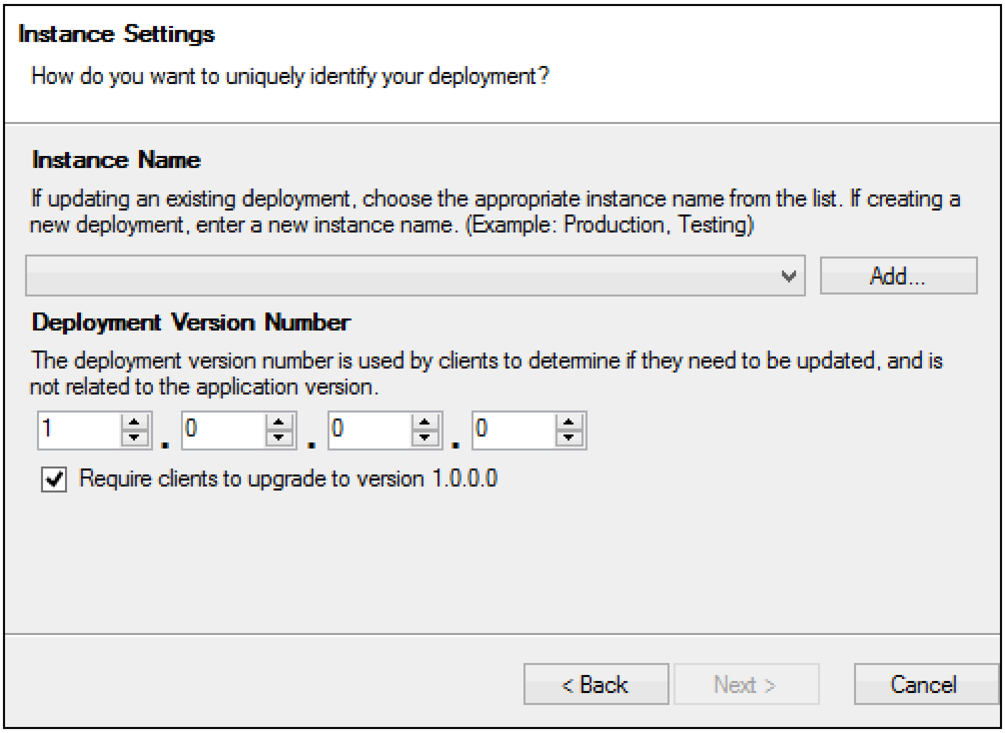
Select **Advanced Mode** to enable the ability to update certain aspects of the installation where the default values are populated by the installer. Not selecting this option automatically uses the default values populated by the installer.

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are in Advanced Mode, you still have the option to edit files in the deployment folder at the **File Edit Notification** dialog box that is displayed after the **Deployment Signing** dialog box.

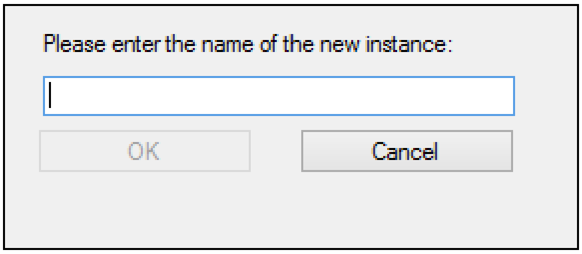
Note: If your servers are configured to use an HTTPS binding, or you are going to enable Active Directory or LDAP Authentication, you should enable **Advanced Mode** in order to be able to configure these options in your deployment.

4. Click **Next**. The **Instance Settings** dialog box is displayed.

Note: If the **Package Selection** dialog box is displayed, select the package to deploy then click **Next** to reach the **Instance Settings** dialog box.



5. Select the name of the application instance from the drop-down list under the **Instance Name** section, or select it from the drop-down select list if you are updating an existing instance. To create a new instance name:
   a. Click the **Add** button to the right of the drop-down list. The **Create New Instance** dialog box is displayed.



Note: If you create a new instance name for an existing deployment, the package must be redeployed to client machines under the new instance name.

b. Enter a name for the new instance in the field provided. The name entered is used to distinguish this deployment from other deployments, so it must be unique.

Note: The instance name cannot contain any of the following characters: **[ ] < > , ; : + = " / \ | ? * # '**

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c. Click **OK**.

6. The **Deployment Version Number** fields can be used to manually set a new version number for this deployment. This number is used by client machines to determine if the application installed needs to be updated.

   The **Deployment Version Number** is incremented automatically by the deployment wizard. The initial Deployment Version Number is **1.0.0.0**, and there is no need to change this number.

Note: The **Deployment Version Number** is not available unless **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog. To enable the **Deployment Version Number**, click **Back** and select **Advanced Mode** on the **Welcome to the Deployment Creation Wizard** dialog.

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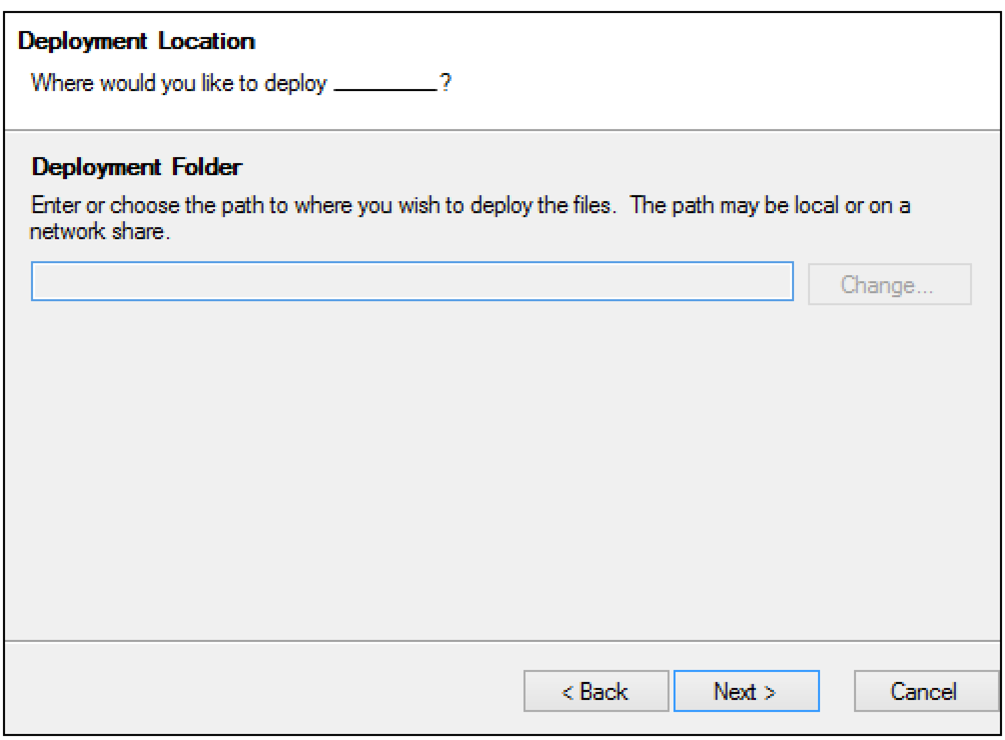
7. Select the **Require clients to upgrade to version** check box to force client machines to upgrade to the current instance. This option is selected by default.
8. Click **Next**. The **Deployment Location** dialog box is displayed.

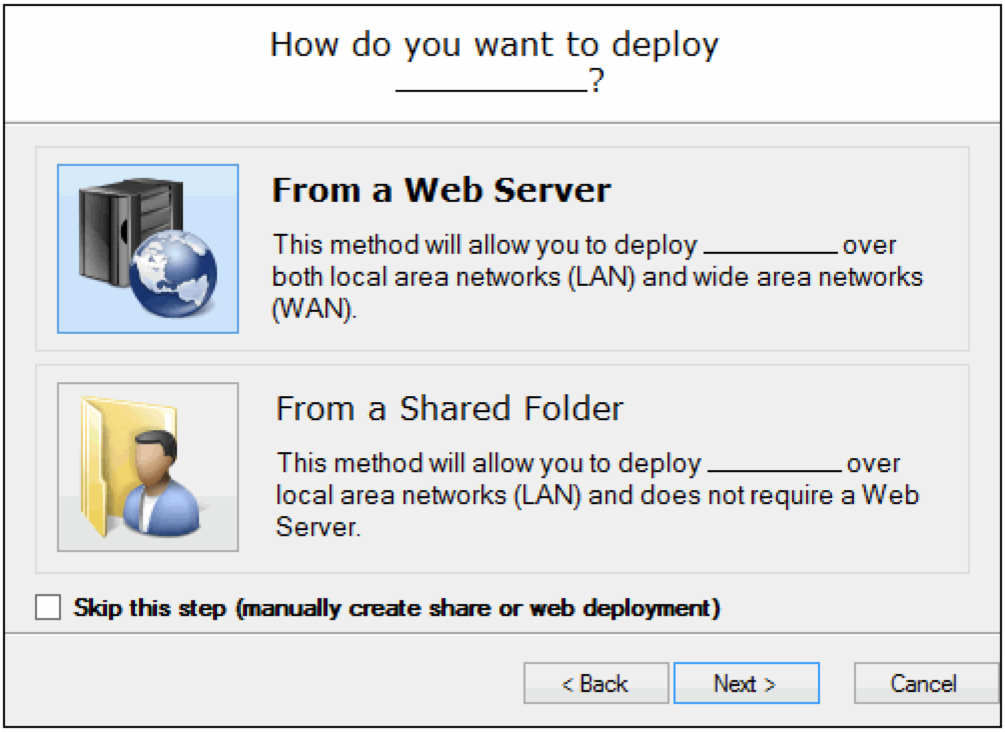


9. Click **Change** beside the **Deployment Folder** field to select a different folder. The **Deployment Folder** can be a local path or network location and is the folder to which the application files are copied on the deployment server.

Note: If you are updating an existing deployment, you cannot change the **Deployment Folder**. If you create a new instance with a different Deployment Folder, the old deployment is not updated and the package must be redeployed to client machines with the new Deployment Folder location.

Caution: Files in the **Deployment Folder** selected are overwritten.

10. Click **Next**. The **How do you want to deploy...?** dialog is displayed.



11. Click the **Web Server** icon to deploy the application to client workstations via a URL (e.g., **https://web-server/Application/DeployedApp.application**).

Note: If IIS is not installed, you cannot select **Web Server** and must deploy the application via a UNC path.

Click the **From a Shared Folder** icon to deploy the application to client workstations via a UNC path (e.g., **\\machine-name\Application\DeployedApp.application**).

Note: The **From a Shared Folder** option is not available if deploying to a network location (e.g., \\MyServer\MyShare).

Select **Skip this step** to configure the deployment folder manually as a shared folder or a virtual directory.

12. Click **Next**.
    - For **Web Server** installations, go to the Web Server Installation Steps.
    - For **From a Shared Folder** installations, go to the From a Shared Folder Installation Steps.
    - If **Skip this step** is selected, go to the Manually Created Share Steps.

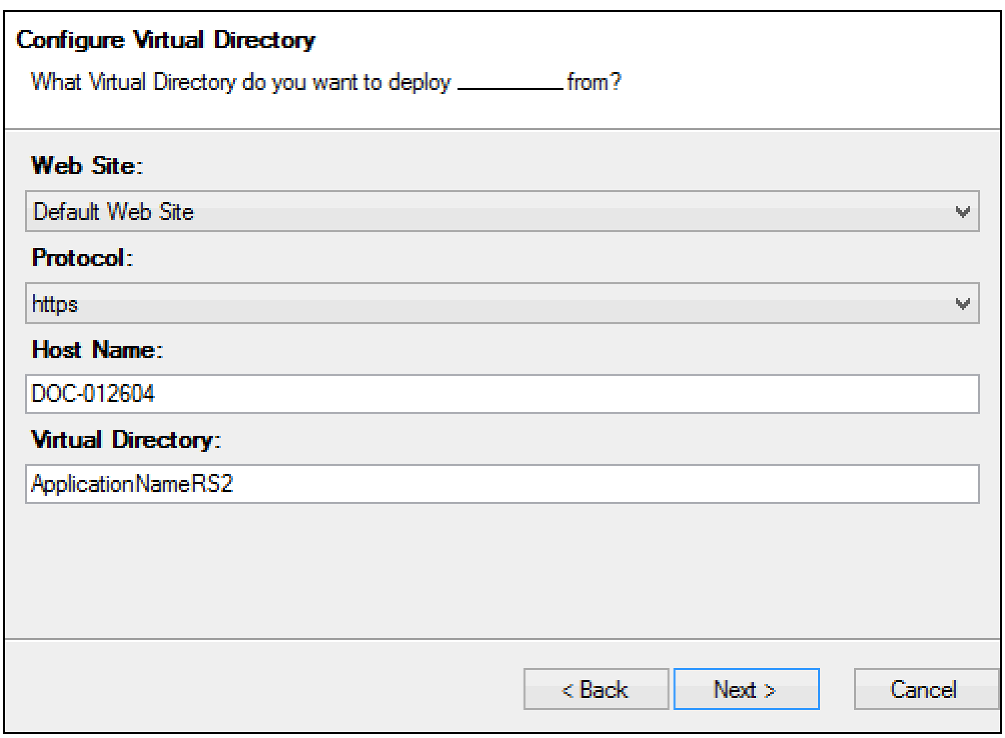
Web Server Installation Steps

If you are installing the deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

Tip: For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

After selecting **Web Server** at the **How do you want to deploy...?** dialog box, the **Configure Virtual Directory** dialog is displayed:



1. Select the **Web Site** to create the virtual directory under from the drop-down list.

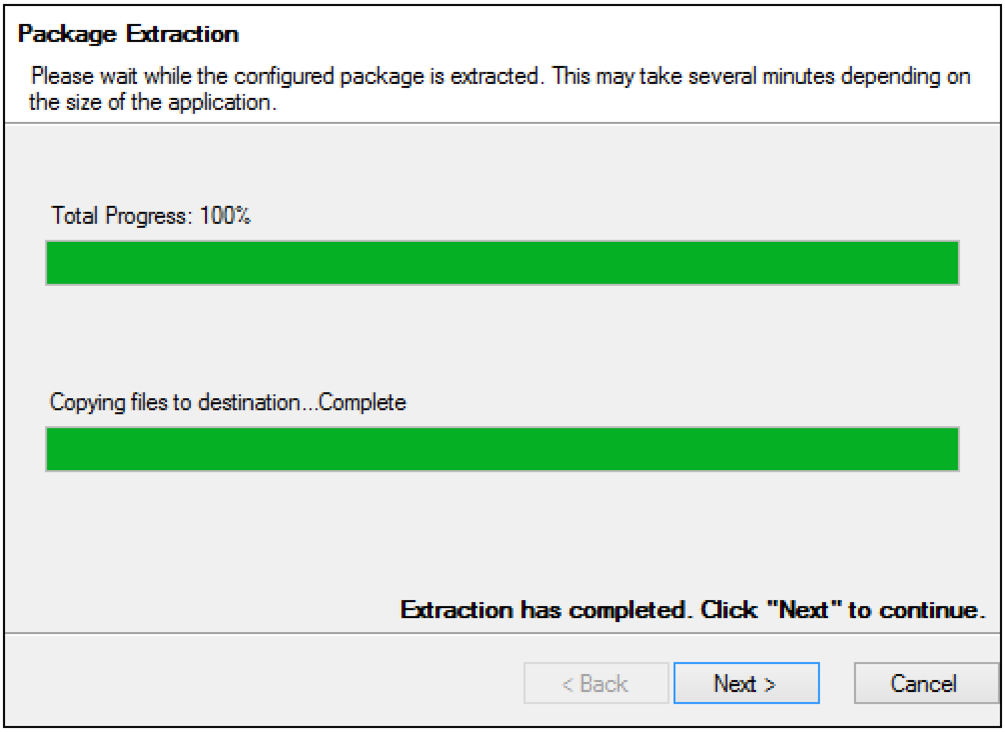
Note: The application generated by the deployment wizard uses the security settings from the Default Web Site in IIS.

2. Select a **Protocol** from the drop-down list. This allows you to configure the installed application to use the **https** protocol if an HTTPS binding is available.
3. Enter the **Host Name** of the **Web Site** selected, or accept the default host name presented. In some cases, such as with an HTTPS binding, the default value may need to be changed to match the host name in the certificate.

   To specify a port to use for this connection, include the port number in the host name: **<host name>:<port>** (e.g., **DEV-007832:82**).
4. Enter a name for the **Virtual Directory** in the field provided. This is the name of the virtual directory created under the Web server selected.

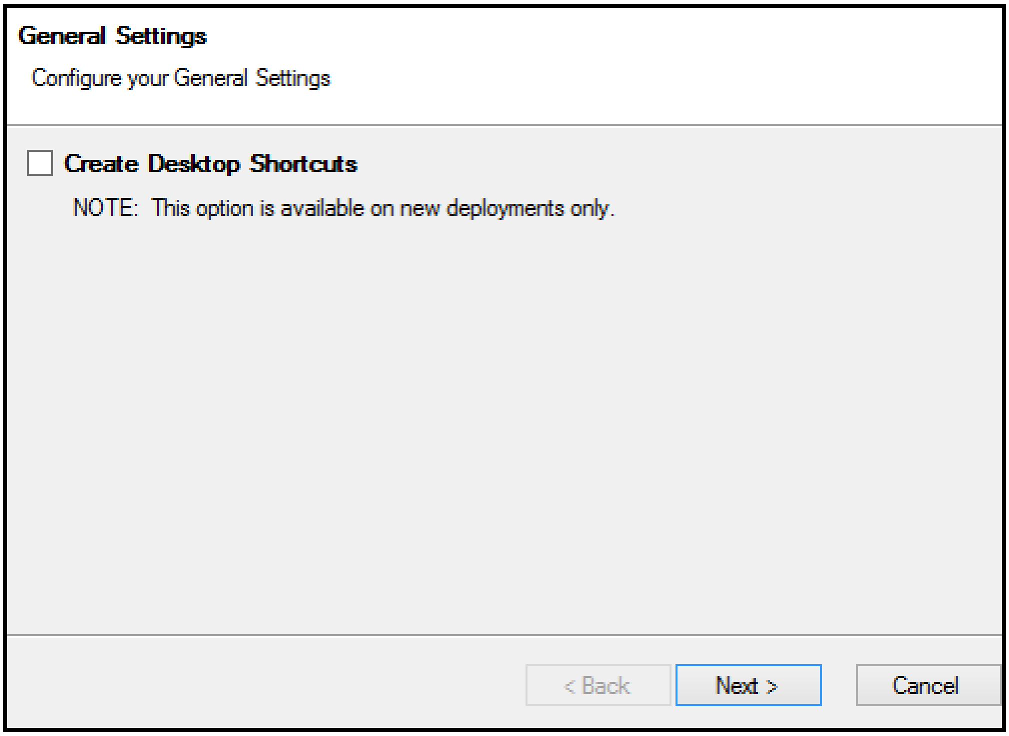
Note: If a virtual directory with the same name already exists, the existing virtual directory is configured to point to the **Deployment Folder** configured. The following special characters cannot be used in the Virtual Directory name: **\ ? ; : @ & = + $, | " < > ***.

5. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



6. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.



Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

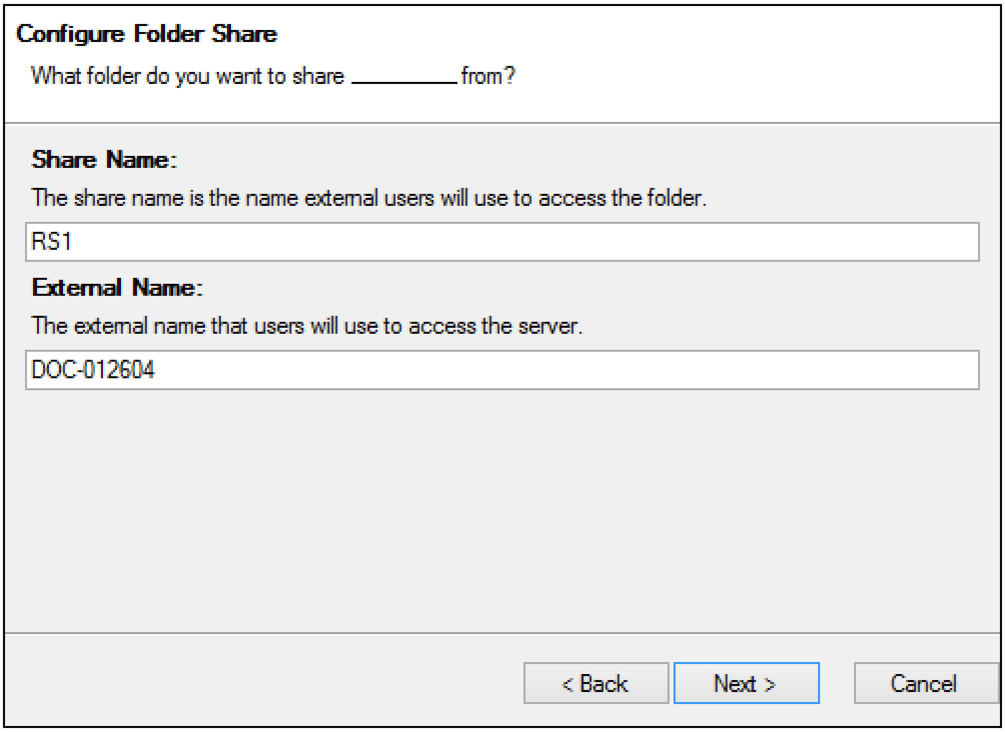
Note: This option is only available for new deployments.

7. Click **Next**.

Note: You do not need to complete the steps under **From a Shared Folder Installation Steps** or **Manually Created Share Steps**. Proceed to the section after the **Manually Created Share Steps** section.

From a Shared Folder Installation Steps

If you selected **From a Shared Folder** at the **How do you want to deploy...?** dialog, the **Configure Folder Share** dialog is displayed:



Note: Read access on the shared folder is required for users to be able to install and upgrade the deployed application. Shared folder permissions must be set outside of this installation for deployments installed to a UNC location.

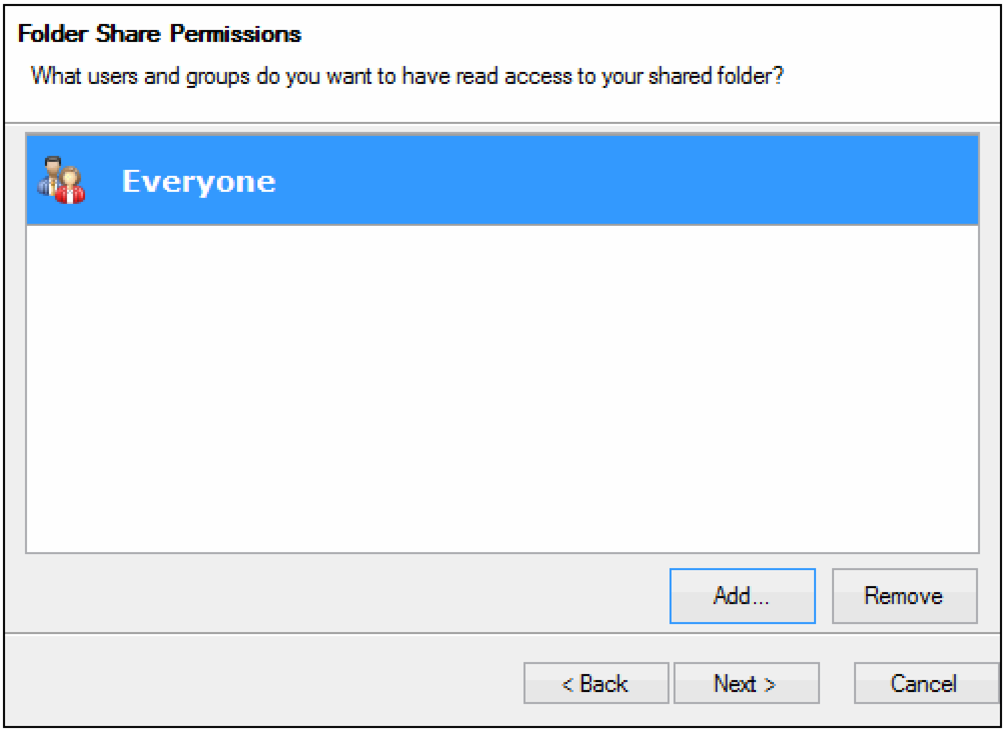
1. Enter a **Share Name** in the field provided. This is the name that the **Deployment Folder** will be shared as to users.

Note: The **Share Name** must be unique. You cannot enter the name of an existing share.

2. Enter the **External Name** of the server hosting the **Deployment Folder** configured, or accept the default value presented. This is the name users will use to access the server. The default value is the machine name of the machine containing the shared folder.

Note: The **External Name** field is only available if **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog.

3. Click **Next**. The **Folder Share Permissions** dialog is displayed if you are installing the deployment to a local drive (e.g., **C:**):

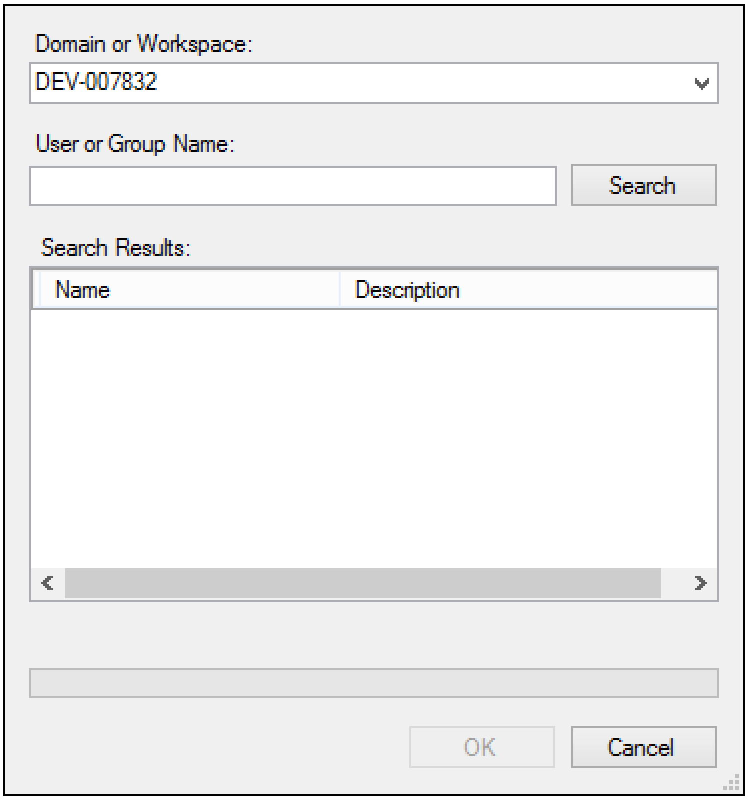


This dialog allows you to add or remove the users and groups that have **read** access to the **Deployment Folder**. By default, the local **Everyone** group is given **read** access.

Note: Read access is required for users to be able to install and upgrade the deployed application.

4. Click **Add** to add additional users or groups, or select a user or group to remove and click **Remove** to remove it. If the users and groups presented are acceptable, proceed to the next step.

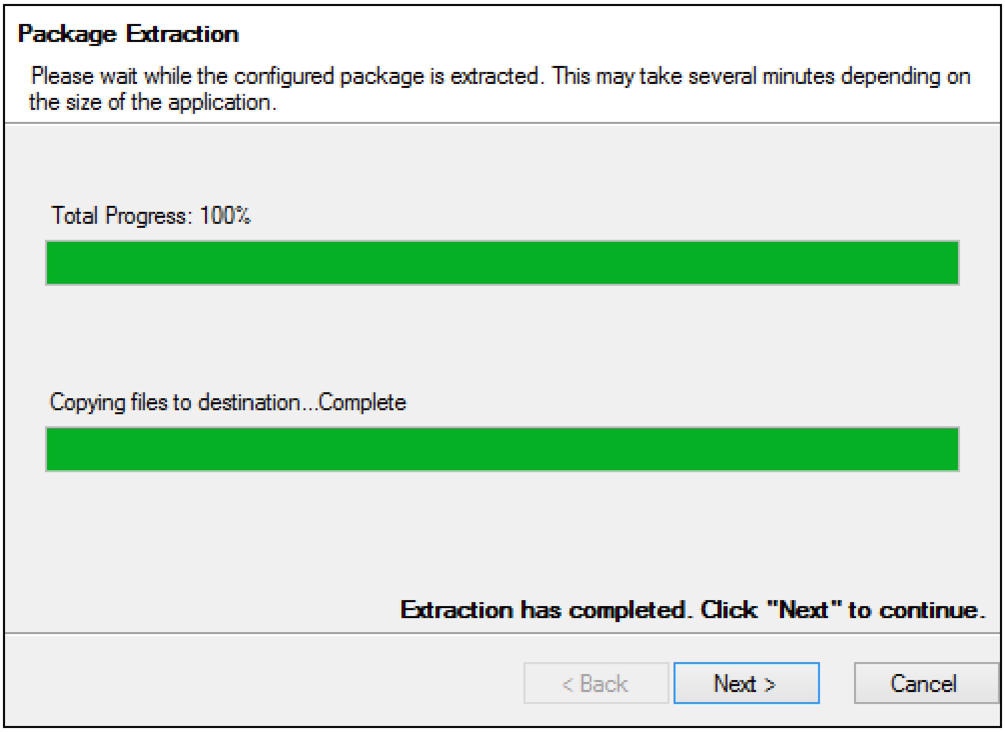
   If you click **Add**, the **Select Users and Groups** dialog is displayed:



   Select the **Domain or Workspace** to find users and groups under from the drop-down list, then enter a **User Group or Name** to search for in the field provided, and click **Search**. Leave the **User or Group Name** field empty to locate all available accounts.

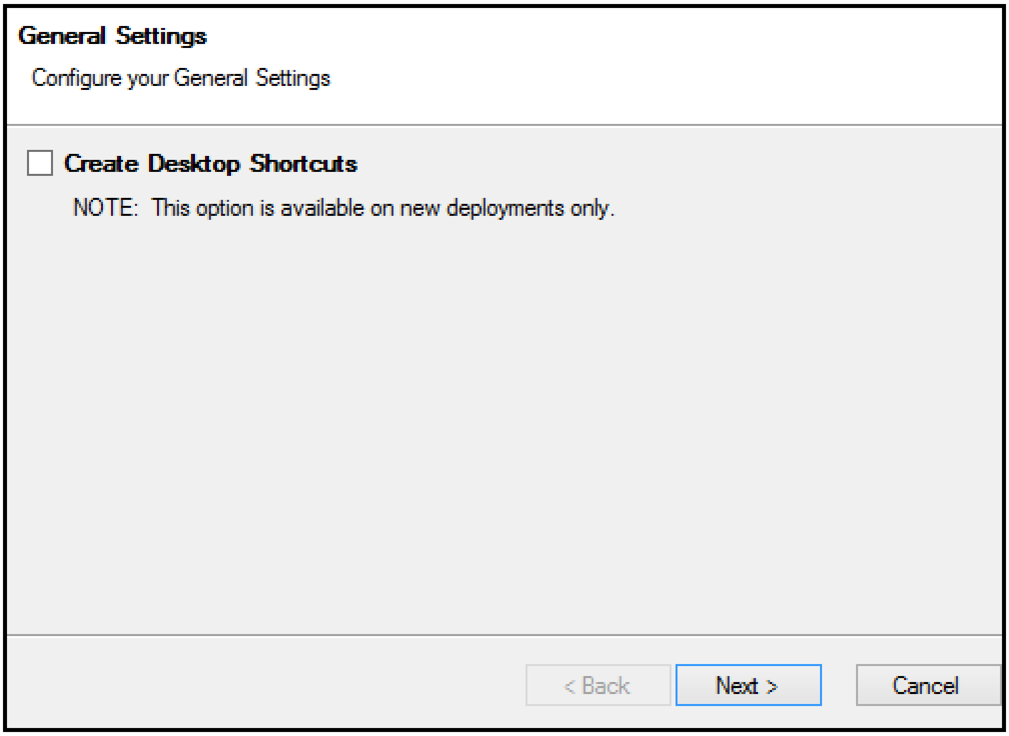
   Select the user or group to add from the **Search Results**, then click **OK**. Repeat as necessary to configure your **Folder Share Permissions**.

5. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



6. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.



Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

Note: This option is only available for new deployments.

7. Click **Next**.

Note: You do not need to complete the steps under **Manually Created Share Steps**. Proceed to the section after the **Manually Created Share Steps** section.

Manually Created Share Steps

If you selected **Skip this step** at the **How do you want to deploy...?** dialog, you must manually create the share that the deployment will be installed to.

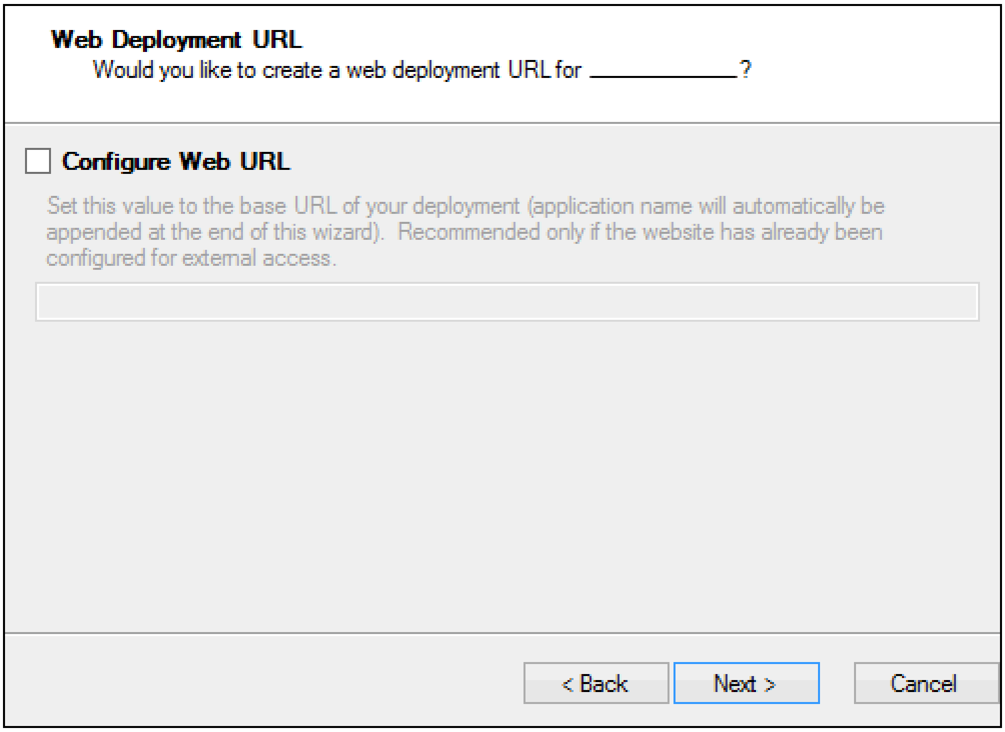
If you are installing the deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

Tip: For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

If you are installing the deployment package to a network share, **Read** access on the shared folder is required for users to be able to install and upgrade the deployed application. Shared folder permissions must be set outside of this installation.

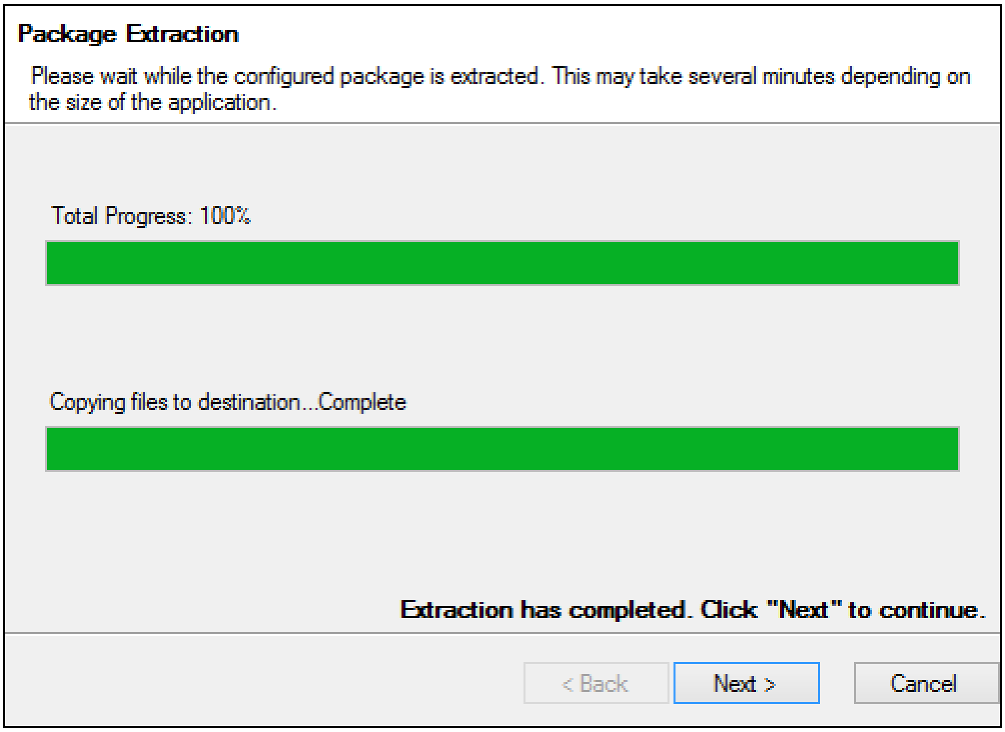
If you selected **Skip this step** at the **How do you want to deploy...?** dialog, the **Web Deployment URL** dialog is displayed:



1. Select **Configure Web URL** to have the installer create the link to the deployment that will be sent out to client machines for client installations of the deployed application. This link is available to be copied at the end of the installation, if one is configured.

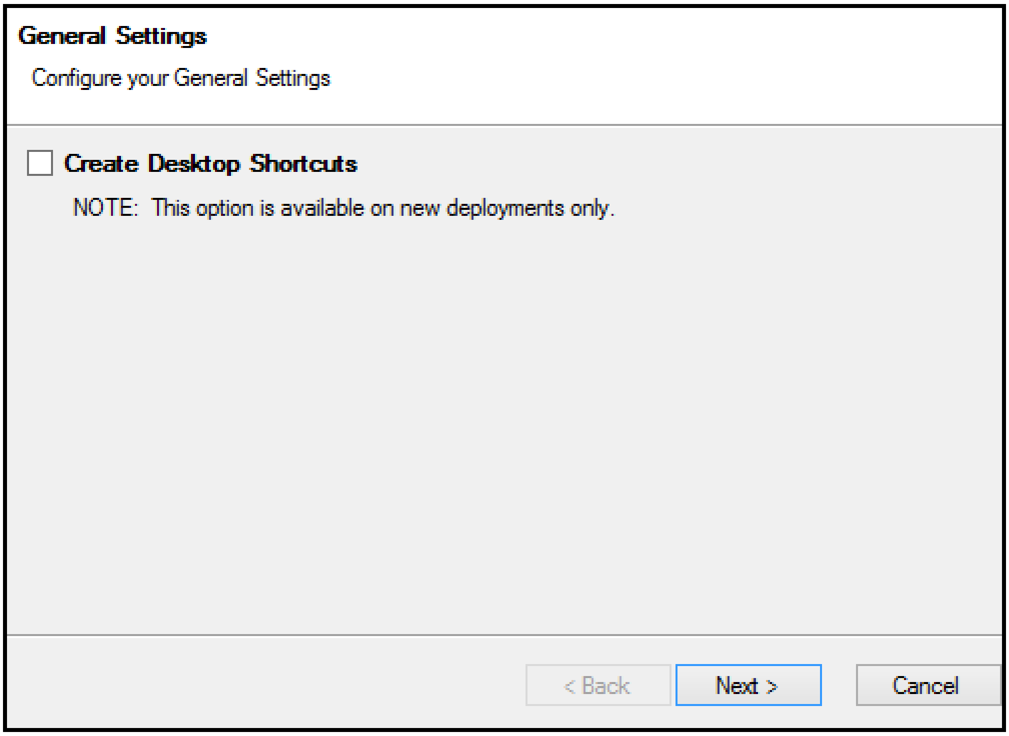
Tip: Do not select this option if the deployment Web site has not been configured for external access.

2. In the field, enter the base URL of your deployment without the application name (for example, **https://web-server/virtual-directory**). The application name is automatically appended to the URL at the end of the installation.
3. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



4. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.



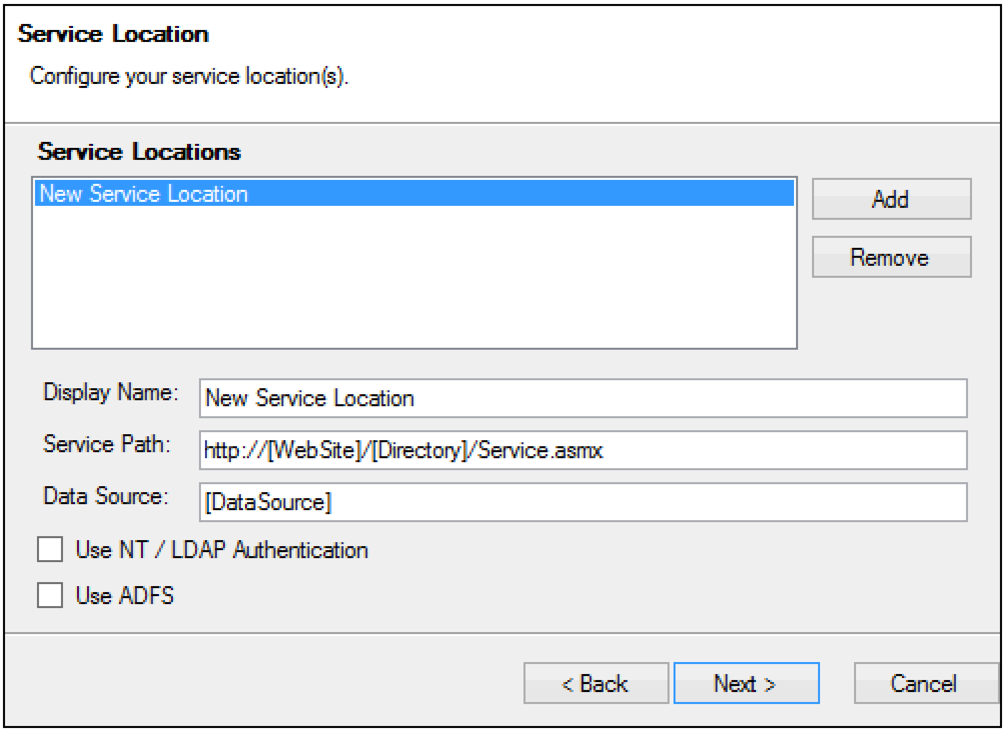
Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

Note: This option is only available for new deployments.

5. Click **Next**.

Service Location and Deployment Configuration

After clicking **Next**, the **Service Location** dialog is displayed.



1. Click **Add**.
2. Enter in the **Display Name** field the name of the service location.
3. Enter in the **Service Path** field the full URL to the OnBase application or Web server service (for example, **https://machinename/AppServer/Service.asmx** or **https://machinename/AppNet/Service.asmx**).

Note: URLs that use the HTTPS binding must be correctly configured on the server for secure connections.

4. In the **Data Source** field, enter the data source name for the appropriate data source.
5. Select **Use NT / LDAP Authentication** if your system uses Active Directory or LDAP Authentication.

Note: In order to use Active Directory or LDAP authentication, the database against which Document Composition runs must also be configured for Active Directory or LDAP authentication. The installer configures Document Composition to match the authentication scheme of the database.

6. Select **Use ADFS** if your system uses AD FS (Active Directory Federation Services) authentication.

Note: Use ADFS is not the same Active Directory authentication scheme as **Use NT/LDAP Authentication**. The **Use ADFS** option is not available for all modules. If this option is not displayed, the module you are installing either does not support AD FS or must be manually configured for AD FS authentication. You cannot enable both **Use ADFS** and **Use NT/LDAP Authentication**. For more information about configuring OnBase to use AD FS, see the **Legacy Authentication Methods** module reference guide.

Selecting **Use ADFS** causes the remainder of the deployment to be run in Advanced Mode, even if Advanced Mode was not selected initially, because the configuration file for the module must be updated before signing and finalizing the deployment.

Note: Depending on the module being updated or added, you may be required to complete information in additional dialogs specific to the module. See the main installation steps above for information on any additional dialogs or steps that must be completed before signing the deployment.

Package-Specific Installation Steps

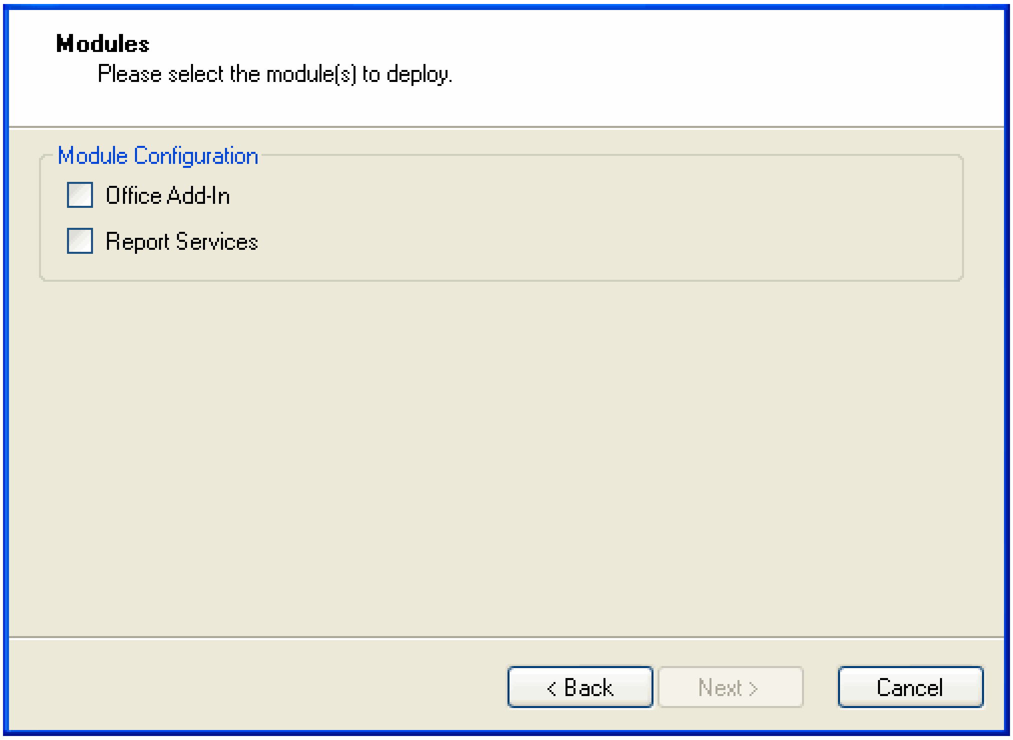
Some of the packages installed using the Hyland Office Products Installer require additional configuration.

Template Builder

Template Builder has no additional configuration steps to install the deployment package. Go to Deployment Signing.

Excel Add-In

After configuring the service location, the **Modules** dialog is displayed:



Note: The options available in this dialog are dependent on the licensing and rights of the user who logged in to OnBase.

Select the integrations to install, then click **Next** and complete the steps in the corresponding sections below.

Office Add-In

Select **Office Add-In** to install the Office Add-In for Excel deployment package. There are no additional configuration steps to install the deployment package. Go to Deployment Signing on page 60.

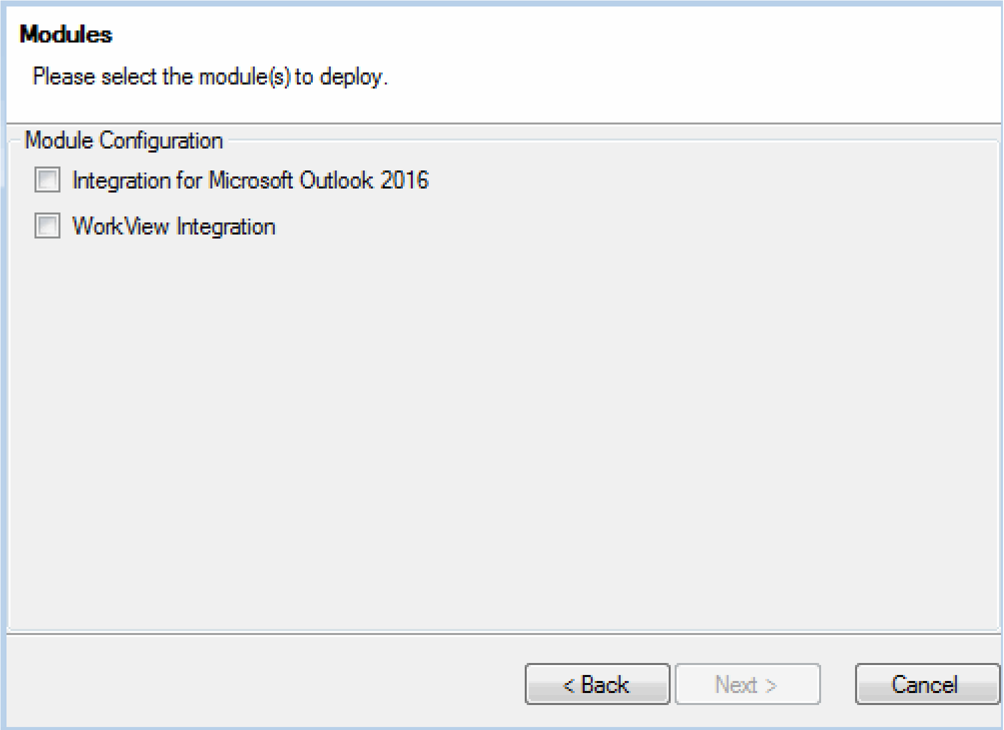
Note: To install the Office Add-Ins for PowerPoint and Word you must install those deployment packages separately by selecting them at the **Package Selection** dialog.

Report Services

The Report Services Excel Add-In has no additional configuration steps to install the deployment package. Go to Deployment Signing on page 60.

Outlook Integration

After configuring the service location, the **Modules** dialog is displayed:

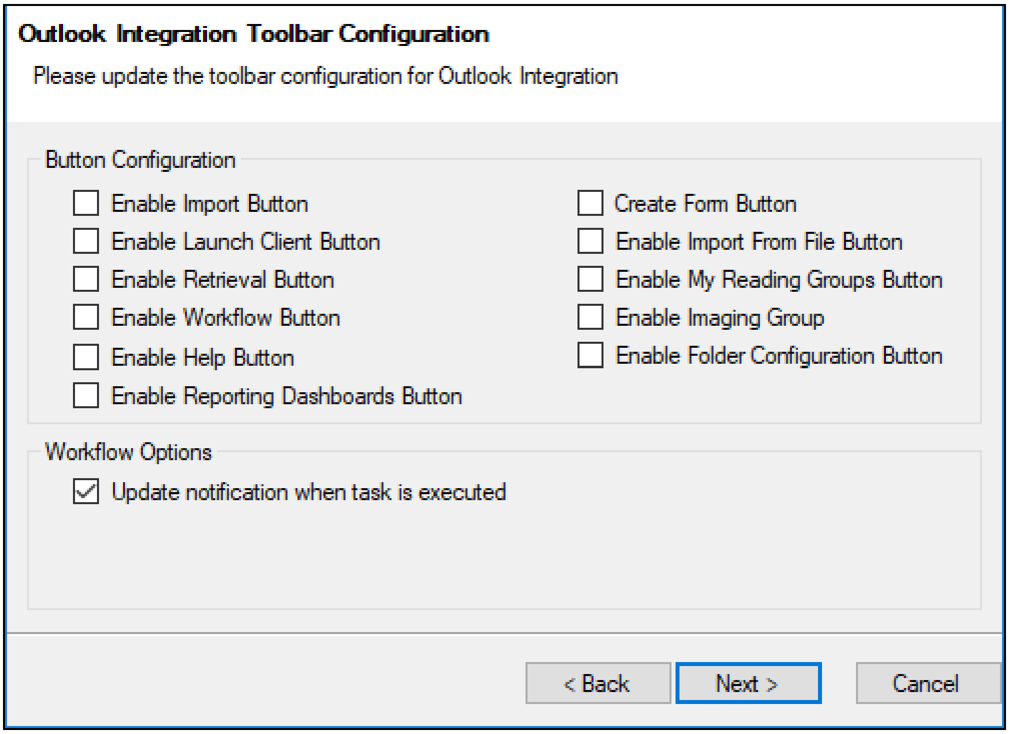


Note: The options available in this dialog are dependent on the licensing and rights of the user who logged in to OnBase.

Select the integrations to install, then click **Next** and complete the steps in the corresponding sections below.

Integration for Microsoft Outlook 20XX

1. The **Outlook Integration Toolbar Configuration** dialog is displayed.



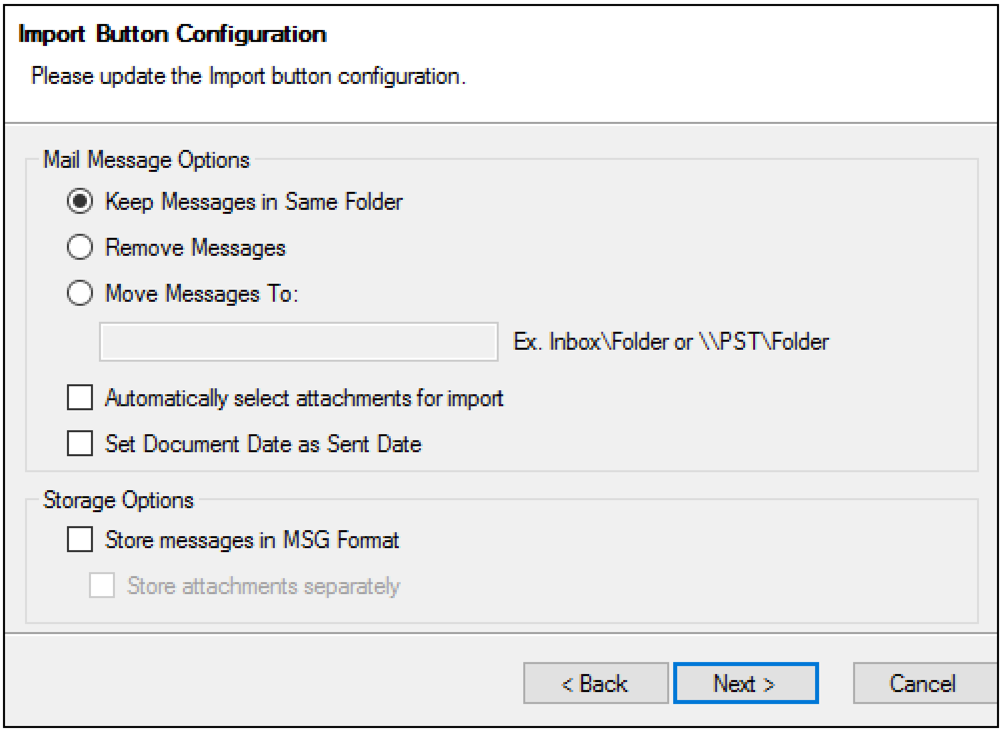
2. Select the options you would like to enable:

Note: Enabling options does not guarantee they are available in Outlook. Options may also require specific User Group privileges, additional licensing, or both.

Option	Description
Button Configuration	
Enable Import Button	If selected, the **Import** button is available on the Outlook Integration toolbar. This function allows users to import messages directly to OnBase from Outlook.
Enable Launch Client Button	If selected, the **Launch Client** button is available on the Outlook Integration toolbar. This function allows users to launch the OnBase Client directly from Outlook.
Enable Retrieval Button	If selected, the **Retrieval** button is available on the Outlook Integration toolbar. This function allows users to retrieve documents archived in OnBase directly from Outlook.

Option	Description
Enable Workflow Button	If selected, the **Workflow** button is available on the Outlook Integration toolbar. This function allows users to launch the OnBase Workflow Client directly from Outlook.
Enable Help Button	If selected, the **Help** button is available on the Outlook Integration toolbar. This provides users access to the relevant OnBase help files.
Enable Reporting Dashboards Button	If selected, the **Dashboards** button is available on the Outlook Integration toolbar. This function allows users to create a new dashboard directly from Outlook.
Enable Create Forms Button	If selected, the **Create Form** button is available on the Outlook Integration toolbar. This function allows users to create a new form.
Enable Import From File Button	If selected, the **Import from File** button is available on the Outlook Integration toolbar. This function allows users to open the **Import from File** window.
Enable Imaging Group	If selected, the Imaging options are available on the Outlook Integration toolbar. These options include the **Send to Scan Queue** and **Batch Processing** buttons. These functions allow you to route messages and attachments into a Scan Queue or batch scan process. **Note:** The **Send to Scan Queue** option does not populate mail System Keywords (such as MAIL To). If you need to populate mail System Keywords, open the document in Workflow and use the **Set Property from Email Metadata** action. For more information, see the **Workflow** module reference guide.
Enable My Reading Groups Button	If selected, the **My Reading Groups** button is available on the Outlook Integration toolbar. This function allows users to open the My Reading Groups interface.
Workflow Options	
Update notification when task is executed	Select to update Workflow email notifications after a task is executed, to include specific information on the ad hoc task that was executed.

3. Click **Next**. Depending on the options you selected, the **Import Button Configuration** dialog box may be displayed.



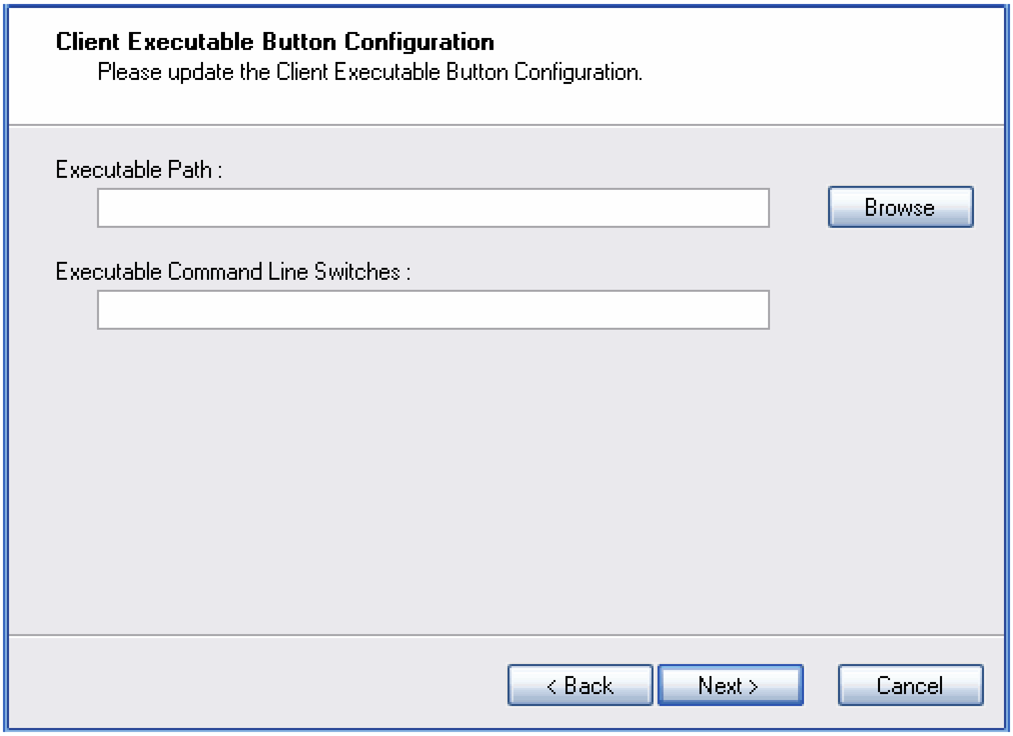
4. Configure the following options:

Option	Description
Mail Message Options	
Keep Messages in Same Folder	Email messages that are imported into OnBase are kept in the same Outlook mail folder after being imported. This option is selected by default when the **Enable Import Button** option is selected. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Remove Messages	Email messages that are imported into OnBase are deleted from the email server after being imported. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Move Messages To	Email messages are moved to a different Outlook folder after being imported into OnBase. Enter in the field provided the folder for imported email messages to be moved to. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Automatically select all attachments for import	Automatically selects all email attachments when importing email messages into OnBase. **Note:** Users can still modify which email attachments are actually included when importing email messages into OnBase.
Set Document Date as Sent Date	Use the date that an email was sent as the Document Date for the message when it is imported into OnBase. If this option is not selected, the date the email message was imported into OnBase is used as the Document Date. **Note:** If this option is selected and an email does not have a **Received Time** value, the current date is used.
Storage Options	

Option	Description
Store messages in MSG Format	**Selected:** Select this option to archive messages in OnBase in their native Outlook format (***.msg**). When messages stored in this format are retrieved, they are displayed in the Outlook message viewer instead of the OnBase document viewer. However, this allows you to access all of the same Outlook functionality that is available when you open a message in Outlook (e.g., forwarding a message, replying to a message, etc.). **Note:** When this option is selected, users are unable to view the message that is being imported by clicking the envelope icon in the **Import Mail Document** dialog box. This may prevent messages from being indexed incorrectly. **Not selected:** If this option is not selected, messages are archived in the format in which the message was created (e.g., plain or rich text, or HTML). When messages are retrieved, they are displayed in the OnBase document viewer. Attachments and messages are stored as separate documents and are retrieved in their respective file formats.
Store attachments separately **Note:** This option is only available if **Store messages in MSG Format** is selected.	**Selected:** If **Store messages in MSG Format** is selected, select this option to store attachments as separate documents from the messages they are attached to. Attachments are stored and retrieved in their respective file formats and the **Attachment(s)** button is available in the **Import Mail Document** dialog box, if the message has attachments. **Not selected:** If **Store messages in MSG Format** is selected and this option is not selected, all attachments are stored in the same *.msg file as the message they are attached to and the **Attachment(s)** button is not available in the **Import Mail Document** dialog box.

Tip: For a complete discussion of the Outlook Integration import functionality, see one of the Integration for Microsoft Outlook module reference guides.

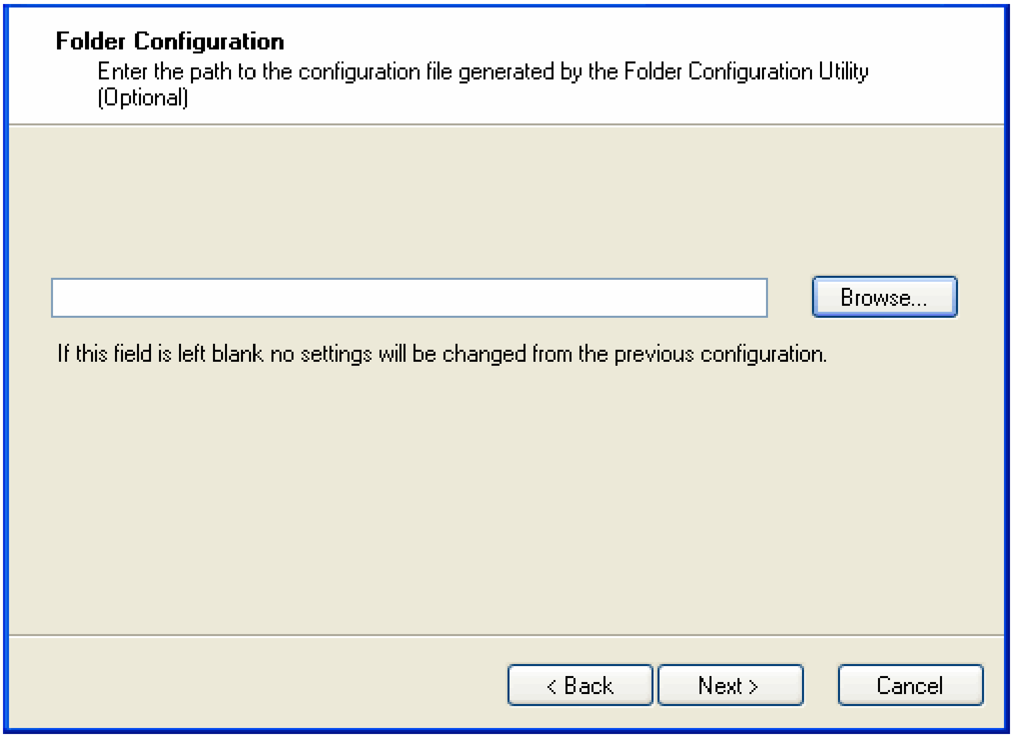
5. Click **Next**. Depending on the options you selected, the **Client Executable Button Configuration** dialog may be displayed.



6. Enter the path to the OnBase Client executable in the **Executable Path** field, or click the **Browse** button next to the field to browse to the location of your OnBase Client executable.
7. Enter in the **Executable Command Line Switches** field any OnBase command line switches to append to the OnBase Client when it is launched from Outlook.

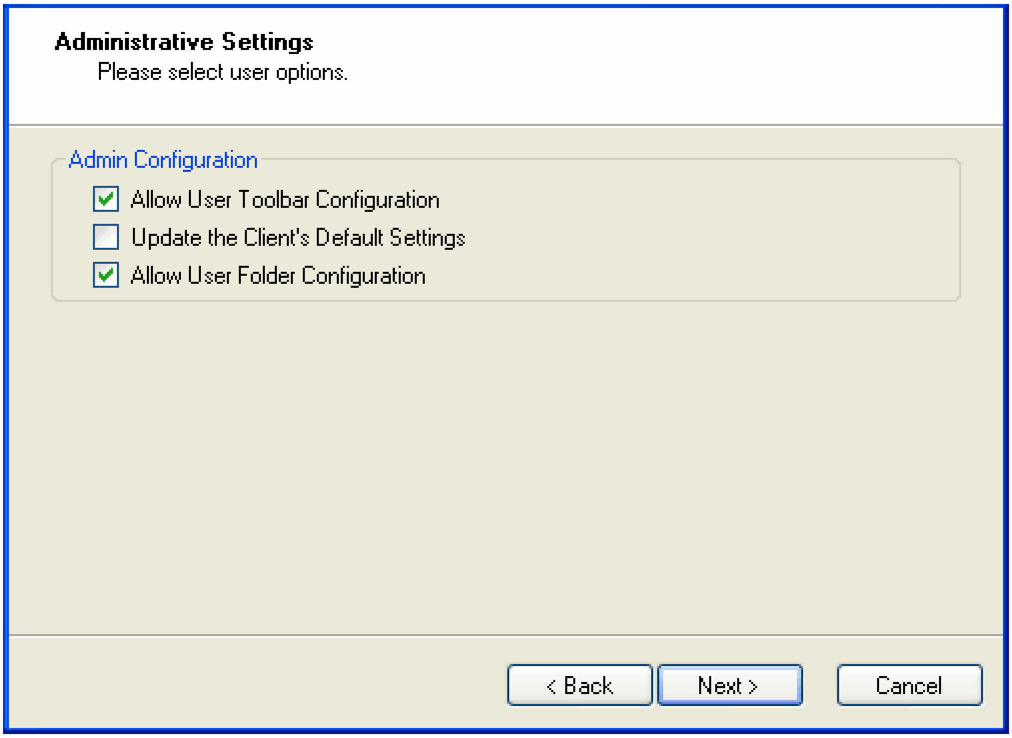
Tip: For more information on command line switches, see the **Command Line Switches** section in the **System Administration** module reference guide.

8. Click **Next**. Depending on the options you selected, the **Folder Configuration** dialog may be displayed.



If you created a folder configuration file using the **Folder Configuration Utility**, enter the full path to it in the field provided, or click **Browse** to navigate to the file and select it. If you did not create a folder configuration file, leave the field empty.

9. Click **Next**. The **Administrative Settings** dialog is displayed.



10. Configure the following options:

Option	Description
Allow User Toolbar Configuration	If selected, users can change the default configuration of their Outlook Integration toolbar.
Update the Client's Default Settings	If selected, the default settings of this deployment instance override the settings of clients installed using an earlier version of this deployment instance. For example, this option must be selected to overwrite previously configured command-line switches. **Note:** This option is not available if **Allow User Toolbar Configuration** is not selected.
Allow User Folder Configuration	If selected, users can change the configuration of their Outlook folders.

11. Go to Deployment Signing on page 60.

WorkView Integration for Outlook

The WorkView Integration has no additional configuration steps to install the deployment package. Go to Deployment Signing on page 60.

PowerPoint Add-In

There are no additional configuration steps to install the PowerPoint Add-In deployment packages. Go to Deployment Signing on page 60.

Word Add-In

There are no additional configuration steps to install the Word Add-In deployment packages. Go to Deployment Signing on page 60.

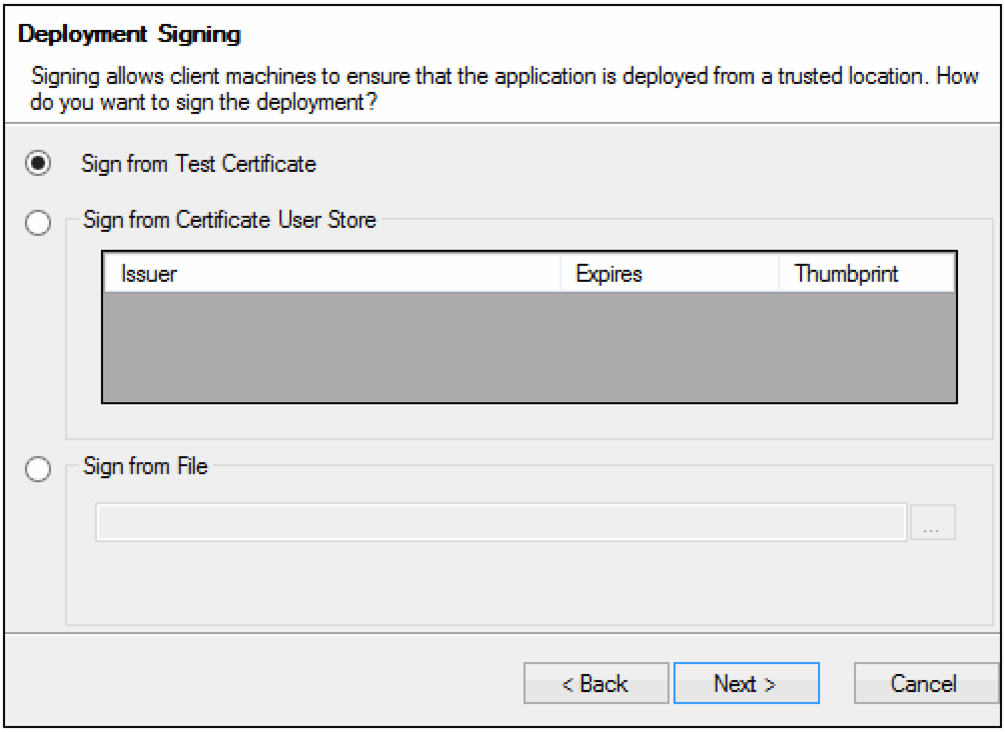
Deployment Signing

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box.

If you are in Advanced Mode, you still have the option to edit files in the deployment folder at the **File Edit Notification** dialog box that is displayed after the **Deployment Signing** dialog box.

If you are not in advanced mode, you must access the files directly by navigating to the deployment location before signing the deployment.

The **Deployment Signing** dialog box is displayed.



1. Select the appropriate signing method.

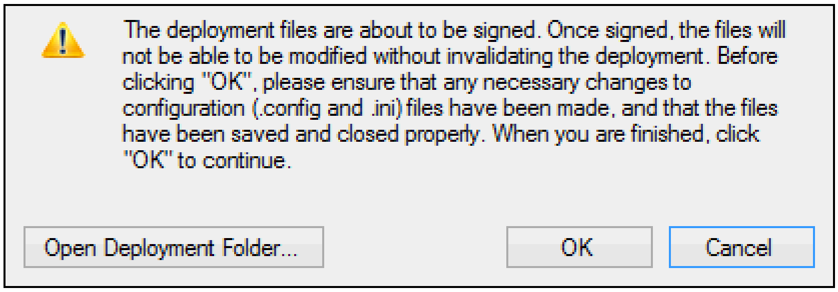
   When **Sign from Test Certificate** is selected, a test certificate with the Common Name **localhost** is used. This test certificate is packaged with all ClickOnce installers. For security purposes, it is strongly recommended that this certificate remain un-trusted. This does not mean the certificate cannot be used, simply that when users attempt to launch the ClickOnce link, they are prompted with a message stating that the publisher could not be verified.

   When **Sign from Certificate User Store** is selected, certificates from the current user store are listed under this option. If there are any certificates in the current user store, they can be used for signing here. Only certificates purposed for code signing are valid.

   When **Sign from File** is selected, the deployment is signed using the PFX file entered in the corresponding field. Only certificates purposed for code signing are valid.

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are not in advanced mode, you must access the files directly by navigating to the deployment location before clicking **Next** and signing the deployment.

2. Click **Next**. If you are in **Advanced Mode**, the **File Edit Notification** dialog box is displayed.



   From this dialog box you can open the deployment folder by clicking **Open Deployment Folder**. At this time, any necessary changes to the files in the folder or the contents of the folder must be made, such as custom changes to the *.config file for the module.
3. If you want to change the language and culture settings of the deployment, you must click **Open Deployment Folder** and edit the corresponding ***.exe.config** or ***.dll.config** file before signing the deployment (in other words, before clicking **OK**). If these settings are not changed, the default operating system language and culture settings are used for the module.

Note: The Template Builder always uses the default operating system language and culture settings.

To change the language and culture settings:

a. Open the deployment folder and open the corresponding ***.exe.config** or ***.dll.config** file in a plain-text editor, such as Notepad. Do not use a binary-text editor, such as Word, to edit this file.
b. Locate the **<Hyland.Canvas>** node.
c. Remove the comment tags (**<!--** and **-->**) from the **<DisplayLanguage>** node to enable it and display the module in a language different from the default operating system language. If this node remains commented, the default operating system language is used for the module.
d. Replace the value of the **<DisplayLanguage>** node with the language name of the language you want the module displayed in, such as **de-DE** for German or **fr-FR** for French (for more information on language names, see **http://msdn.microsoft.com/en-us/library/ms533052(VS.85).aspx**). The default value of this node is **en-US**.
e. Remove the comment tags (**<!--** and **-->**) from the **<Culture>** node to enable it and override the default Windows locale settings. If this node remains commented, the module displays dates, times, currencies, and numeric values using the default Windows locale settings configured in the Windows Regional and Language Options.
f. Replace the value of the **<Culture>** node with the culture name of the culture you want the module to use, such as **de-DE** for German or **fr-FR** for French. For a complete list of supported cultures, see the **Web Server** documentation. The default value of this node is **en-US**.
g. Save and close the file.

4. Click **OK** on the **File Edit Notification** dialog box. Upon clicking **OK**, the folder is signed and cannot be modified without updating the deployment instance.
5. If you signed the deployment from a file, and the certificate requires a password, you will be prompted to enter the password for the certificate.

Tip: You can paste the password into the field to ensure accuracy.

6. The application is deployed and the **Summary** dialog is displayed upon completion.

   Clicking the link provided under **Success** launches the application. This is the same as the full path that external users must use to install and launch the application.

   Click **Copy Link To Clipboard** to copy this link to the clipboard.
7. Click **Finish**.

Upon completing these steps, you have installed the Deployment Wizard and installed an instance. You can add additional instances and access the Deployment Wizard by selecting **Start | All Programs | Hyland | Deployment | Deployment Wizard**. You can also update existing instances in the same way. See the Updating or Adding a Deployment Instance section for more information.

Additional Installation

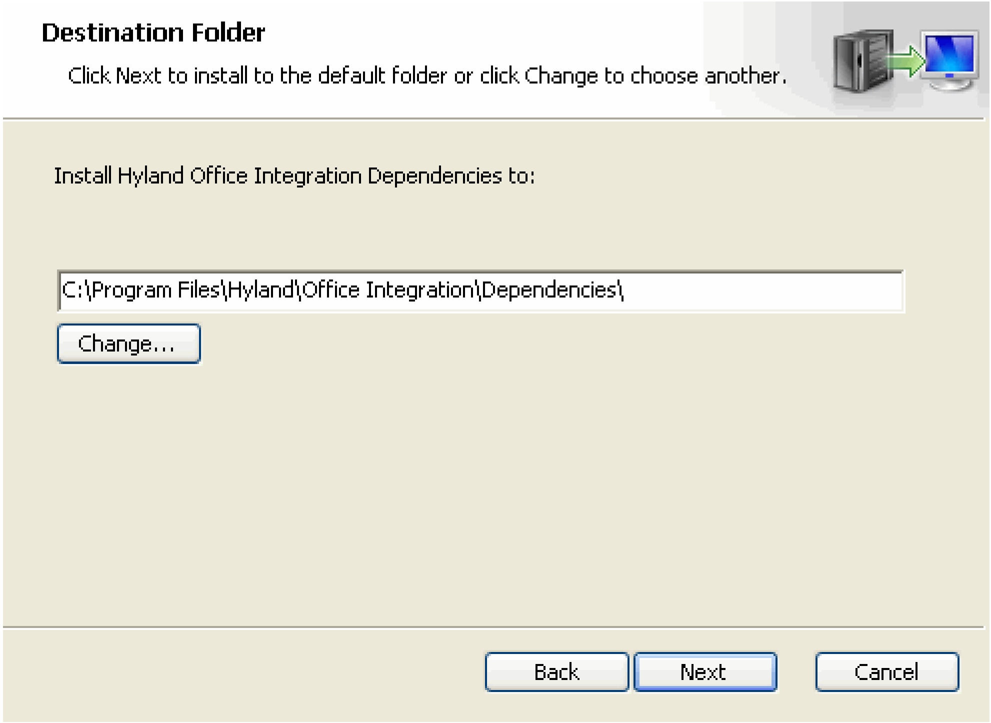
After running the **Hyland Office Products Deployment** installer you must run the separate **Hyland Office Integration Dependencies** installer on each workstation before the Office integration packages are deployed to those workstations. This installer installs the prerequisites required to use the Office and Outlook integration modules on the client workstations. These prerequisites are not included in the deployment packages and cannot be deployed using ClickOnce.

The **Hyland Office Integration Dependencies** installer installs the following prerequisites on the workstation:

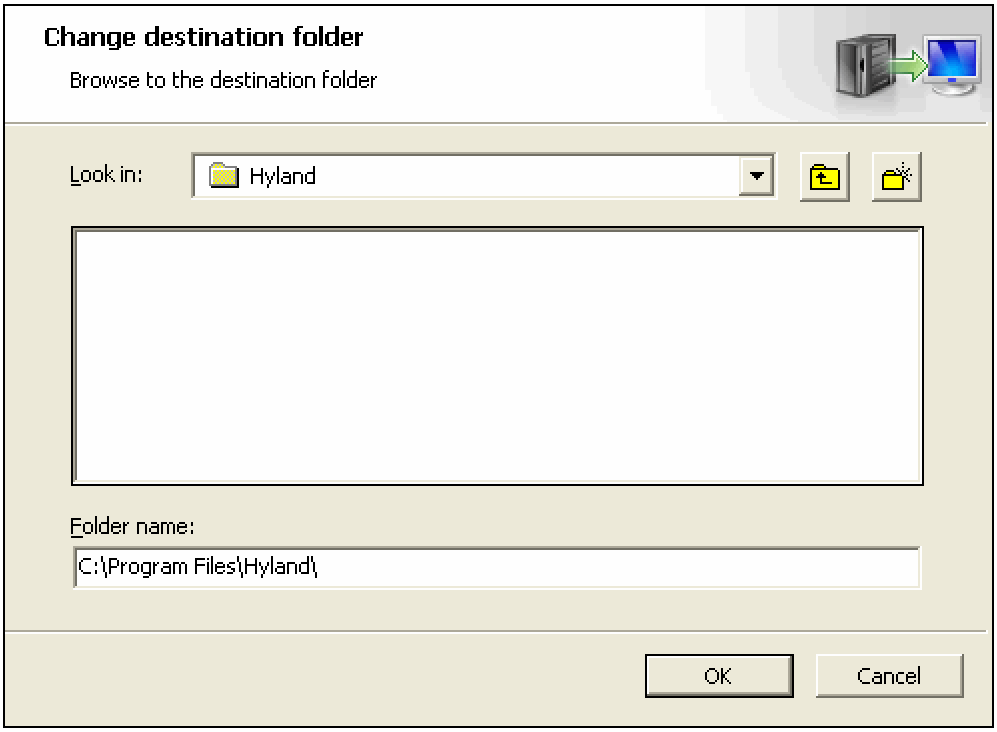
- dsoframer.ocx
- wiaaut.dll
- Microsoft Visual Studio 2010 Tools for Office Runtime (x86) SP1 package

To run the **Hyland Office Integration Dependencies** installer, execute **setup.exe** by double-clicking on the file name in or using **Start | Run**. This executable is usually located in the **\install\ClickOnce\Office Products\Dependencies** folder of your source installation files.

1. Click **Next** at the **Welcome** dialog. The **Destination Folder** dialog is displayed.



2. To change the installation location of the installed components, click **Change**. The **Change destination folder** dialog is displayed.



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

If the destination folder is not changed, components are installed to the following default location: **C:\Program Files\Hyland\Office Integration\Dependencies**.

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

3. Click **Next**. The **Ready to install** dialog is displayed.
4. Click **Install**.
5. Click **Finish** after the installation has completed.

Note: The **Hyland Office Integration Dependencies** installer only installs missing prerequisites. If a prerequisite is already installed on the workstation it is not installed again by the **Hyland Office Integration Dependencies** installer.

Remove Installed Prerequisites

After initial installation, the setup program can be used to remove components from a previous installation. After launching **setup.exe** the **Change, repair, or remove installation** dialog is displayed. The only option able for the **Hyland Office Integration Dependencies** installer is **Remove**.

Click **Remove** to remove prerequisites installed by the **Hyland Office Integration Dependencies** installer.

Note: The **Hyland Office Integration Dependencies** installer will only removed installed prerequisites if they are not being used any other applications.

Controlling the Installer from the Command Line

This section describes the feature and property names that can be applied to the command line to install and configure components contained in the **Hyland Office Integration Dependencies** installer.

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

The feature and property names for the components in the **Hyland Office Integration Dependencies** installer are:

- Feature name: **Hyland_Office_Dependencies**
- Property name: **OFFICEDEPENDENCIES_FILES**

Note: Feature and property names are case sensitive and must be added to the command line exactly as they appear in this manual.

The **OFFICEDEPENDENCIES_FILES** property is optional and is used to define the location that the installed components are installed to. If this property is not included the components are installed to: **C:\Program Files\Hyland\Office Integration\Dependencies**.

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

To install the components from the command line use the **ADDLOCAL** property. The **ADDLOCAL** property is appended to the end of the install command line, as shown here in the following example. This example also installs the prerequisites to the **C:\MyCustomFolder** directory:

msiexec /i "Office Integration Dependencies.msi" ADDLOCAL=Hyland_Office_Dependencies OFFICEDEPENDENCIES_FILES="C:\MyCustomFolder\"

Updating or Adding a Deployment Instance

When a change is necessary for a deployment instance, it can be updated or a new instance can be created.

To update an existing instance or create a new instance, do not launch the Hyland Office Products Deployment installer. Instead, select **Start | All Programs | Hyland | Deployment | Deployment Wizard** on the deployment server. This launches the Deployment Wizard and the **Welcome to the Deployment Wizard Creation Wizard** dialog is displayed.

After launching the Deployment Wizard, see General Installation Options on page 32 and go to the **Welcome to the Deployment Wizard Creation Wizard** dialog step, then continue with the procedure to complete updating or adding an instance. The steps to update or add an instance are the same as they were when the Hyland Office Products Deployment installer was originally run, with the exception of how to launch the Deployment Wizard.

Removing a Deployed Application

Deployed applications are installed to both client workstations and the deployment server. This section describes how to remove a deployed application instance from both the client workstations and deployment server, or completely removing the deployed application and all installed instances.

Removing a Deployed Application Instance from Client Workstations

To remove a deployed application instance from a client workstation:

1. Access the Windows Control Panel by selecting **Start | Control Panel** on the Windows desktop.
2. Double click **Add or Remove Programs**. The **Add or Remove Programs** dialog is displayed.
3. Locate the installed application in the list of programs (e.g., **Hyland Document Composition [Instance Name]**).
4. Select the program and click **Change/Remove**. The deployed application **Maintenance** dialog is displayed.
5. Select **Remove the application from this computer**.
6. Click **OK**.

The installed application is removed from the workstation.

Note: Removing the application instance from client workstations does not remove the application instance from the deployment server. Users can re-install a removed application instance by following the original link to the instance. To completely remove a deployed application instance, see Removing a Deployed Application Instance from the Deployment Server or Completely Removing a Deployed Application below.

Removing a Deployed Application Instance from the Deployment Server

If a deployed application instance is removed from all client workstations, it can be re-installed by users who follow the link to the deployed application instance, unless the instance is also removed from the deployment server.

To remove an instance of a deployed application in order to reset the version and/or re-use an instance name:

1. Access the Windows Registry (enter **regedit** in the Windows **Start | Run** dialog). The **Registry Editor** dialog is displayed.

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

2. Expand the following registry key:
   HKEY_LOCAL_MACHINE\SOFTWARE\Hyland\Deployment
   Under 64-bit systems this key may be located at:
   HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Hyland\Deployment
3. Expand the subkey that corresponds to the deployed application you want to remove the instance from (for example, **ApplicationEnabler** or **ReportServices**).
4. Right click the subkey that corresponds to the instance name you want to remove.
5. Select **Delete**.
6. Click **Yes** at the confirmation prompt. The deleted instance is no longer available in the Deployment Wizard.
7. Locate the files for the instance to remove on the deployment server.
   The location of the files depends on the location selected during installation. In a default, 32-bit installation, the files are located at **C:\Program Files\Hyland\[ApplicationName]\[InstanceName]** (for example, **C:\Program Files\Hyland\ApplicationEnabler\MyAppEnablerInstance**).
8. Delete all of the files and folders contained in the instance folder, or delete the entire instance folder. The application is no longer available for installation.

Caution: Take care to delete only the folder for the instance you are removing. Deleting the application folder will remove all instances of the deployed application.

Note: If the instance files are not removed from the deployment server, the application instance can still be installed by users who follow the link to the deployed application.

9. Follow the steps above to remove the installed instance from all client workstations (see, Removing a Deployed Application Instance from Client Workstations).

Note: Until the instance is removed from client workstations, the application instance can still be used by client workstations, even if it is removed from the deployment server.

Completely Removing a Deployed Application

To completely remove a deployed application:

1. Follow the steps above to remove all instances of the deployed application from the deployment server (see, Removing a Deployed Application Instance from the Deployment Server).
2. Access the Windows Control Panel by selecting **Start | Control Panel** on the Windows desktop.
3. Double click **Add or Remove Programs**. The **Add or Remove Programs** dialog is displayed.
4. Locate the installed application in the list of programs (e.g., **Hyland Document Composition** or **Hyland Document Composition Deployment**).
5. Select the application and click **Change/Remove**. The application and deployment package is removed.

Note: Removing the last deployed application from the deployment server also removes the **Deployment Wizard** from the deployment server.

6. Follow the steps above to remove all instances of the deployed application from all client workstations (see, Removing a Deployed Application Instance from Client Workstations).

Note: Until all instances of the application are removed from client workstations, the application can still be used by client workstations, even if it is removed from the deployment server.

Installation Using the Standard (MSI) Installer

The **Hyland Office 20XX Integration** installers are used to install the selected modules to the workstation on which it is run (see Overview on page 25).

The Hyland Office Integration installers can be run from an installation CD or a local drive.

Note: You must be appropriately licensed for all modules and functionality installed. You can install, but cannot use, modules for which you are not licensed.

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.

Tip: For complete details on running the installer from the command line, see Controlling the Installer from the Command Line on page 87.

Hyland Office Integration Installer

The Hyland Office integration installer can install the Microsoft Office integration module corresponding to your Microsoft Office configuration. Each supported version of Microsoft Office has its own integration installer.

See the following sections for information on the integration installer and instructions on running the integration installer:

- Hyland Office 2019 Integration Installer Modules on page 72
- Installing the Hyland Office 2019 Integration on page 72

Hyland Office 2019 Integration Installer Modules

The **Hyland Office 2019 Integration** installers are used to install the 32- or 64-bit version of the following modules:

Component	Module
Word 2019 Add-In	Installs the **Office Add-In for Microsoft Word 2019**.
PowerPoint 2019 Add-In	Installs the **Office Add-In for Microsoft PowerPoint 2019**.
Excel 2019 Add-In | Office Add-In	Installs the **Office Add-In for Microsoft Excel 2019**.
Excel Report Services Add-In	Installs the **Report Services Excel Add-In for Microsoft Excel 2019**.
Outlook 2019 Integration | Outlook Integration	Installs the **Integration for Microsoft Outlook 2019**.
WorkView Integration for Outlook	Installs the **WorkView Integration for Microsoft Outlook 2019**.
Template Builder 2019	Installs **Template Builder 2019**, which is the Document Composition configuration component.

Installing the Hyland Office 2019 Integration

To run the Hyland Office 2019 Integration installer:

1. Execute **setup.exe** with administrator privileges. This can be done by right-clicking on the file name and selecting **Run as administrator**. The welcome page is displayed.

   This executable is usually located in the folder of your source installation files that corresponds to the version of the integration you are installing.

Note: If the installer is copied from the source location to be run from a different location, the entire folder and its contents must be copied to the new location.

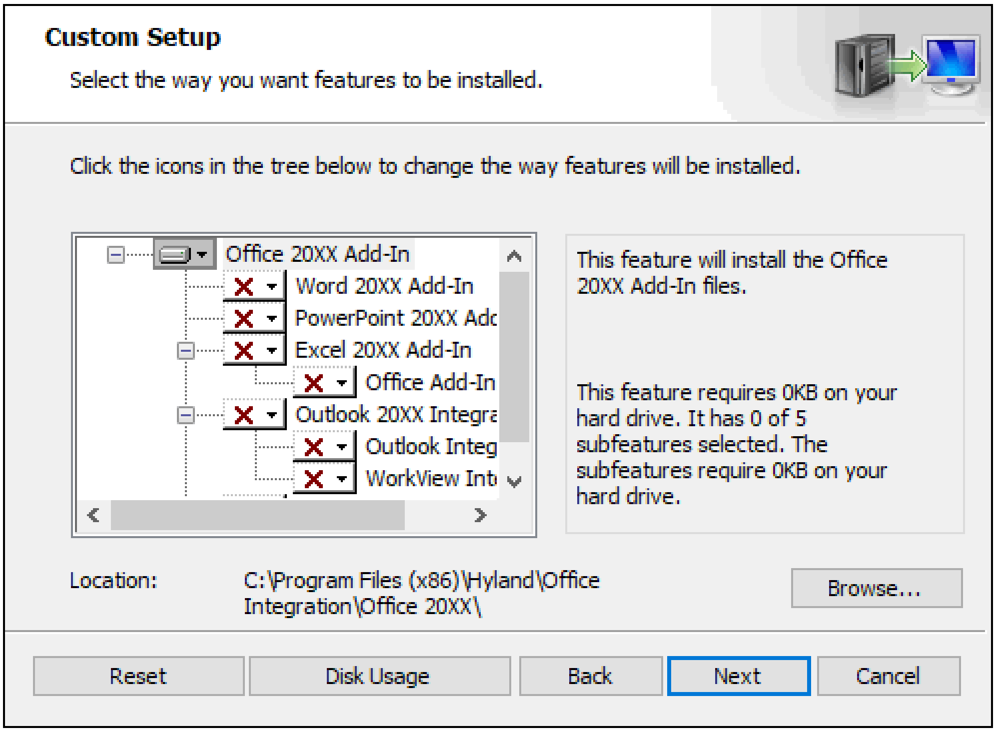
The following are the default folder locations for the 32-bit and 64-bit executable files, where **XX** is the year of the integration:

- Integration for Microsoft Office 20XX (32-bit): **\Office Integration\Office 20XX**
- Integration for Microsoft Office 20XX (64-bit): **\x64\Office Integration\Office 20XX**

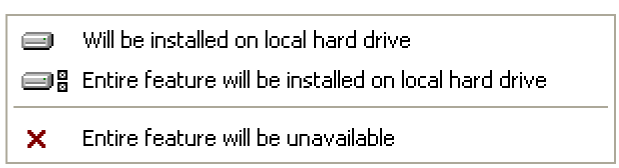
Note: You must use the installer that matches your version of Microsoft Office. For example, if you have a 64-bit version of Microsoft Office, then the 64-bit Hyland Office Products Installer must be used.

2. Click **Next**. The **Custom Setup** page is displayed.

Note: The screen shots used in the following sections are for illustrative purposes. The versions of the add-ins and the components available to install will match the version of the installer you launched.



3. Click the drop-down list beside the name of a component to display the installation options:



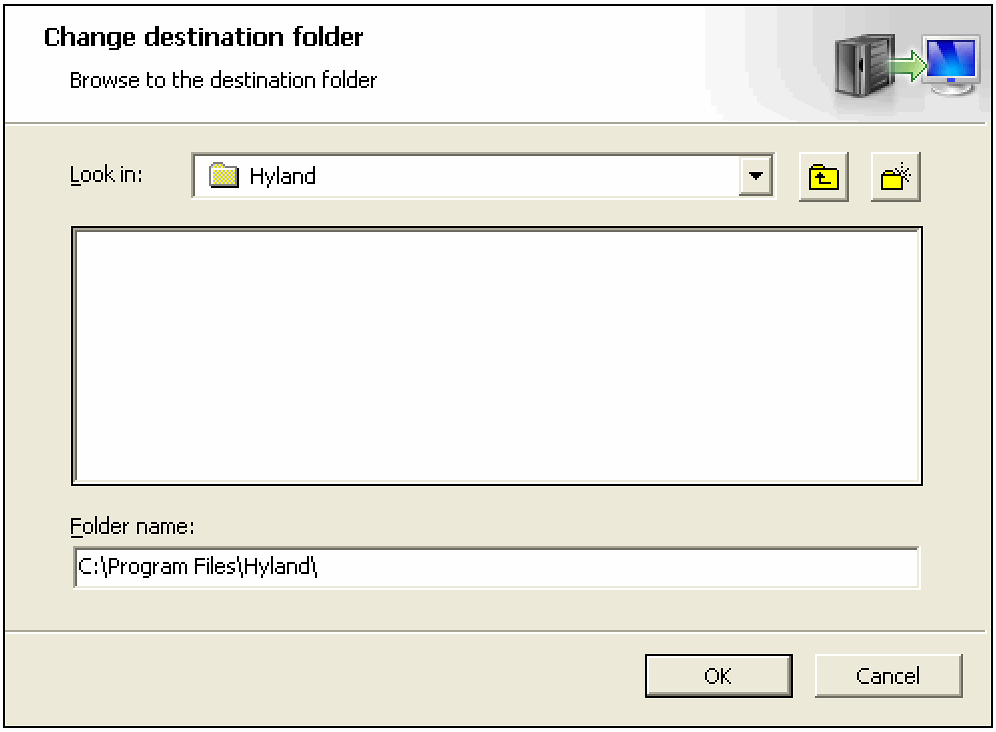
Option	Description
Will be installed on local hard drive	Installs the selected feature and does not install any dependent, optional functionality. To view optional functionality, click the **+** icon next to the feature to expand the sub-feature list.
Entire feature will be installed on local hard drive	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.

Option	Description
Entire feature will be unavailable	Select this option to remove a feature from the list of features to install.

4. 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 list beside **Office 20XX Add-In**.
5. To determine the amount of space available for installation of the selected components, click **Disk Usage**. The **Disk Space Requirements** dialog box is displayed, with information on the space required for the selected components and the space available on the drives accessible by the installation workstation.

6. To change the installation location of the installed components, select **Office 20XX Add-In** and click **Browse**. The **Change destination folder** page is displayed.



Enter the name of the destination folder in the **Folder name** field or select it from the **Look in** drop-down list.

If the destination folder is not changed, components are installed to the following default locations:

- Office 20XX (32-bit): **C:\Program Files\Hyland\Office Integration\Office 20XX**
- Office 20XX (64-bit): **C:\Program Files (x86)\Hyland\Office Integration\Office 20XX**

Note: In these example default locations, **XX** designates the year of the integration you have installed.

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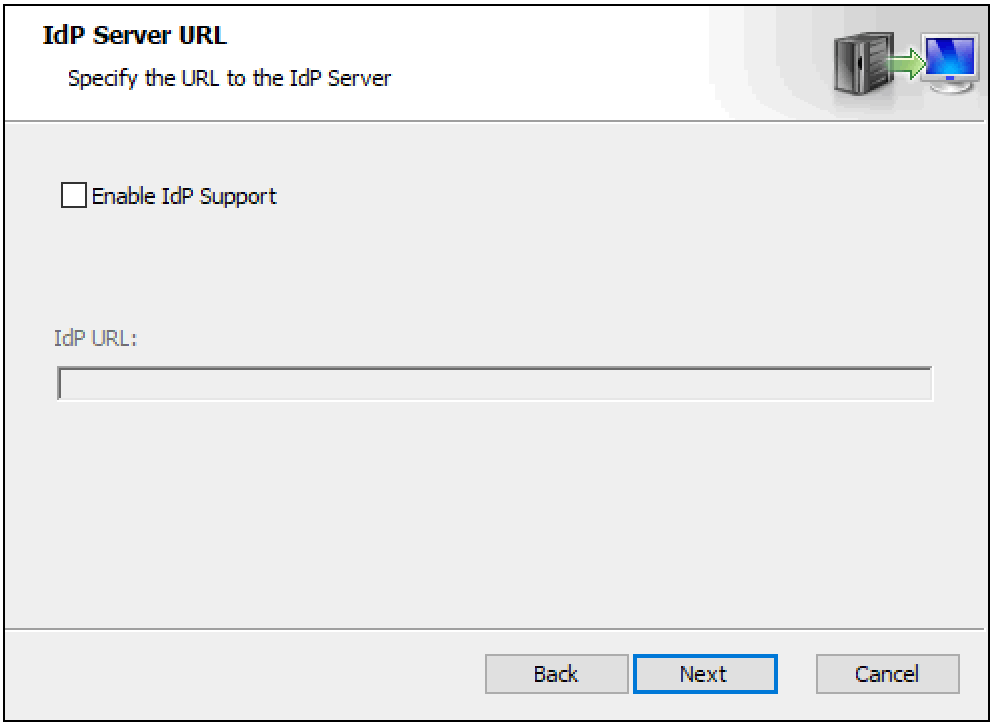
7. Click **OK**.

8. From the **Custom Setup** page, click **Next**. The **IdP Server URL** page is displayed.

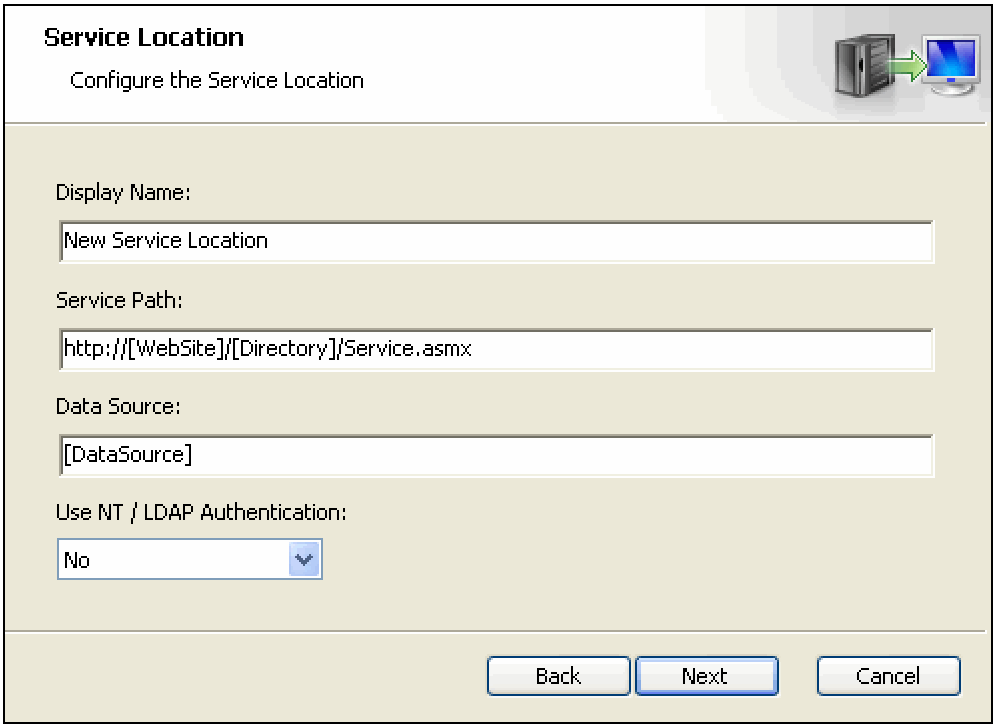


9. Select **Enable IdP Support** if your system uses the Hyland Identity Provider (IdP) server for authentication, then enter the URL to the endpoint of the Hyland IdP server with the tenant in the **IdP URL** field. This value is case sensitive.

   For example, if the Hyland IdP server is at **my.domain/identityprovider**, the tenant name is **MyTenant**, and the environment is configured for secure connections, then the value is **https://my.domain/identityprovider/MyTenant**.

Note: Enabling IdP support in the installer does not work if your environment is not already configured for IdP. Additional configuration is required to enable IdP support for the Hyland Office Products Installers. For more information, see the **Identity and Access Management Services** module reference guide.

10. Click **Next**. The **Service Location** page is displayed.



11. In the **Display Name** field, enter the name of the service location. This should be a user friendly name for the service location.
12. In the **Service Path** field, enter the full URL to the OnBase Application Server service page or Web Server address.

    An Application Server URL should use the following format: **http://machinename/AppServer/Service.asmx**

    A Web Server URL should use the following format: **http://machinename/AppNet/Service.asmx**

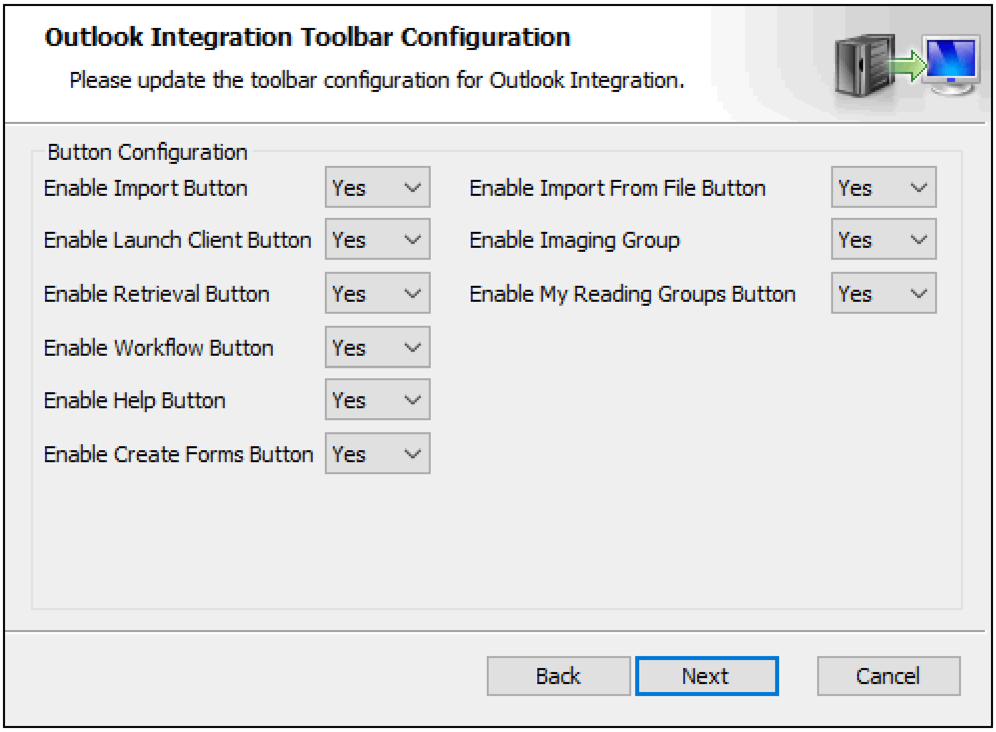
Note: Only Application Server and Web Server URLs ending in **.asmx** and using SOAP can be used with the Office integrations. For example, a remote service path ending in **.rem** is not valid.

13. In the **Data Source** field, enter the data source name for the appropriate data source.
14. From the Use **NT / LDAP Authentication** drop-down list, select one of the following options:
    - Select **Yes** if your system uses NT or LDAP Authentication to use NT/LDAP with the components installed

Note: To use NT or LDAP authentication, the **Data Source** entered must also be configured for NT or LDAP authentication.

- Select **No** if your system does not use NT or LDAP Authentication

15. Click **Next**. If you are installing the Outlook or WorkView integrations, the **Outlook Integration Toolbar Configuration** page is displayed.



16. Select **Yes** to enable an option of the integration or **No** to disable the option.

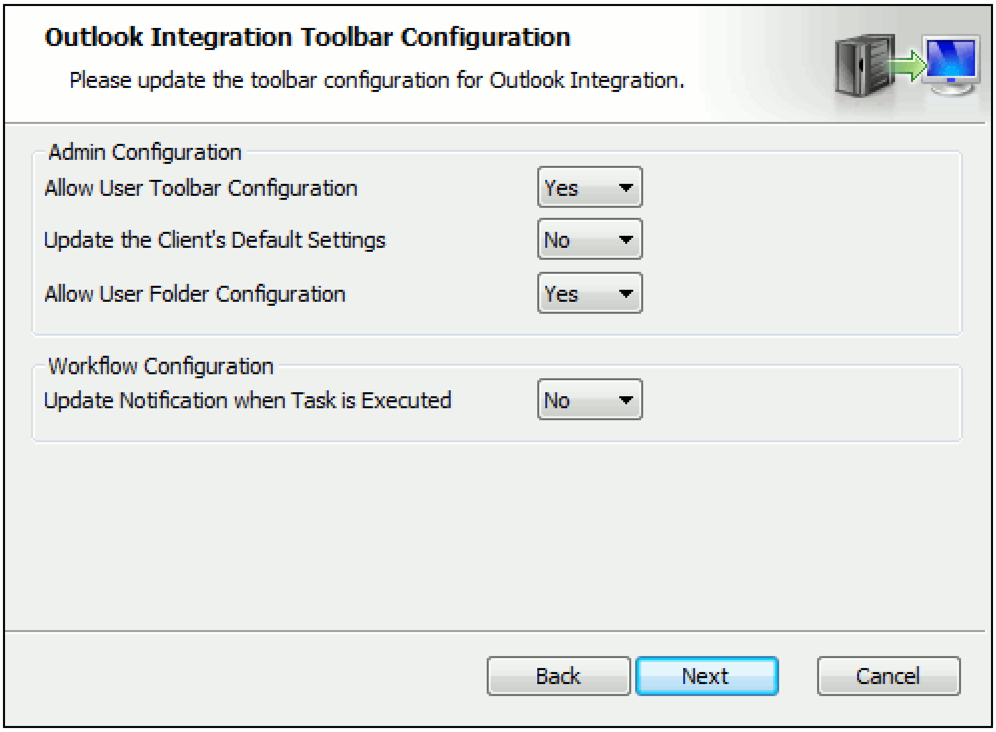
Note: Enabling options does not guarantee they are available in Outlook. Options may also require specific User Group privileges, additional licensing, or both.

The following are the available button configurations:

Option	Description
Enable Import Button	If selected, the **Import** button is available on the integration with OnBase ribbon. This function allows users to import messages directly to OnBase from Outlook.
Enable Launch Client Button	If selected, the **Launch Client** button is available on the integration with OnBase ribbon. This function allows users to launch the OnBase Client directly from Outlook.
Enable Retrieval Button	If selected, the **Retrieval** button is available on the integration with OnBase ribbon. This function allows users to retrieve documents archived in OnBase directly from Outlook.

Option	Description
Enable Workflow Button	If selected, the **Workflow** button is available on the integration with OnBase ribbon. This function allows users to launch a Workflow client directly from Outlook.
Enable Help Button	If selected, the **Help** button is available on the integration with OnBase ribbon. This function allows users access to the relevant OnBase help files.
Enable Create Forms Button	If selected, the **Forms** button is available on the integration with OnBase ribbon. This function allows users to create E-Forms or Unity Forms from Outlook.
Enable Import From File Button	If selected, the **Import from File** button is available on the integration with OnBase ribbon. This function allows users to import selected documents to OnBase.
Enable Imaging Group	If selected, the **Imaging** options are available on the integration with OnBase ribbon. These options include the **Send to Scan Queue** and **Batch Processing** buttons. These functions allow users to route messages and attachments into a scan queue or batch scan process. **Note:** The **Send to Scan Queue** option does not populate mail System Keywords (such as MAIL To). If you need to populate mail System Keywords, open the document in Workflow and use the **Set Property from Email Metadata** action. For more information, see the **Workflow** module reference guide.
Enable My Reading Groups Button	If selected, the **My Reading Groups** button is available on the integration with OnBase ribbon. This function allows users to open the **My Reading Groups** interface.

17. Click **Next** to continue configuring Outlook or WorkView integration options.

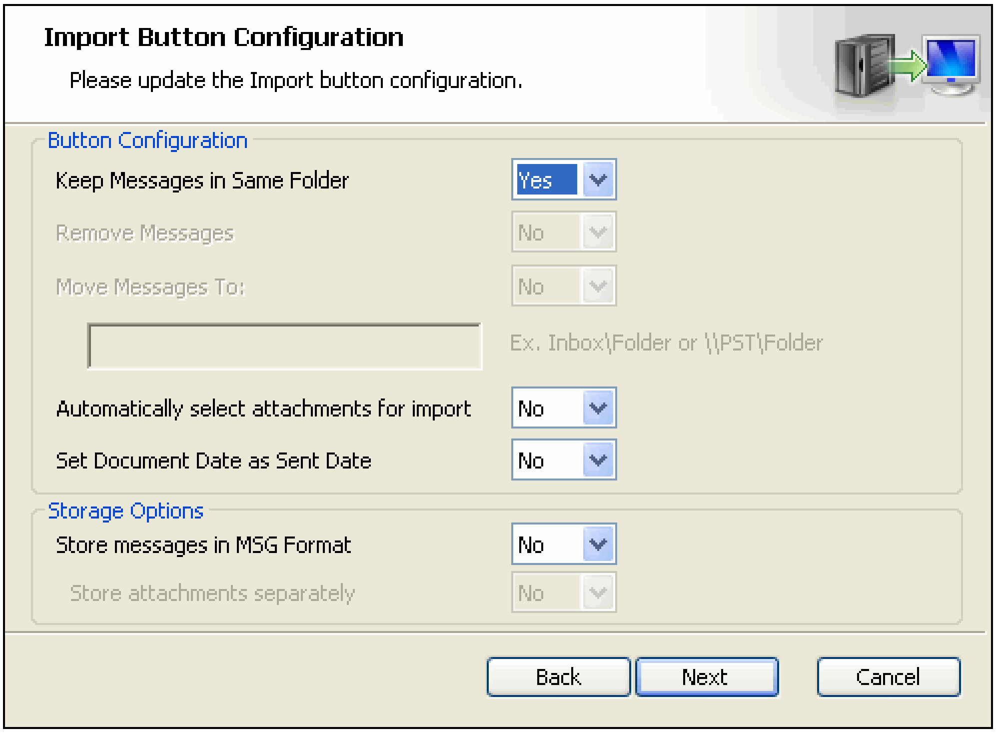


18. Select **Yes** to enable an option of the integration or **No** to disable the option. The following configuration options are available:

Admin Configuration Option	Description
Allow User Toolbar Configuration	If selected, users can change the default configuration of their integration with OnBase ribbon.
Update the Client's Default Settings	If selected, the default settings of this deployment instance override the settings of clients installed using an earlier version of this deployment instance. **Note:** This option is not available if **Allow User Toolbar Configuration** is not selected.
Allow User Folder Configuration	If selected, users can change the configuration of their Outlook folders.

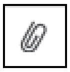
Workflow Configuration Option	Description
Update Notification when Task is Executed	Select to update Workflow email notifications after a task is executed. When selected, email notifications include specific information on the ad hoc task that was executed.

19. Click **Next**. Depending on the options you selected on the **Outlook Integration Toolbar Configuration** page, the **Import Button Configuration** page may be displayed.



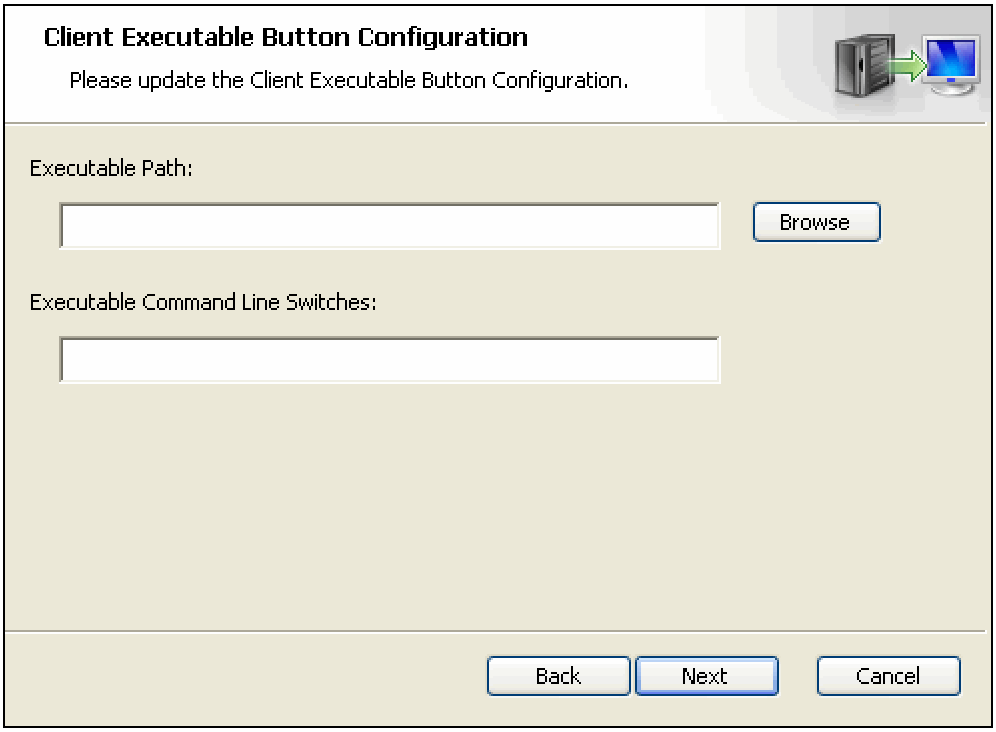
20. Select **Yes** to enable an option of the integration or **No** to disable the option. The following options are available:

Button Configuration Option	Description
Keep Messages in Same Folder	If **Yes** is selected, email messages that are imported into OnBase are kept in the same Outlook mail folder after being imported. This option is selected by default when the **Enable Import Button** option is selected. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Remove Messages	If **Yes** is selected, email messages that are imported into OnBase are deleted from the email server after being imported. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Move Messages To	If **Yes** is selected, email messages are moved to a different Outlook folder after being imported into OnBase. In the field provided, enter the folder to move the imported email messages to. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Automatically select attachments for import	If **Yes** is selected, all email attachments are automatically selected when importing email messages into OnBase. **Note:** Users can still modify which email attachments are actually included when importing email messages into OnBase. See the sections on importing attachments in the **Integration for Microsoft Outlook** module reference guide.
Set Document Date as Sent Date	If **Yes** is selected, the date that an email was sent is used as the Document Date for the message when it is imported into OnBase. If this option is not selected, the date the email message was imported into OnBase is used as the Document Date. **Note:** If this option is selected and an email does not have a **Received Time** value, the current date is used.

Storage Option	Description
Store messages in MSG Format	If **Yes** is selected, messages are archived in OnBase in their native Outlook format (***.msg**). When messages stored in this format are retrieved, they are displayed in the Outlook message viewer instead of the OnBase document viewer. This allows you to access all of the same Outlook functionality that is available when you open a message in Outlook. For example, forwarding a message, replying to a message, etc. If **No** is selected, messages are archived in the format in which the message was created (for example, plain or rich text, or HTML). When messages are retrieved, they are displayed in the OnBase document viewer. Attachments and messages are stored as separate documents and are retrieved in their respective file formats.
Store attachments separately	**Note:** This option is only available if **Store messages in MSG Format** is selected. If **Yes** is selected, email attachments are stored as separate documents from the messages they are attached to. Attachments are stored and retrieved in their respective file formats and the Attachment button is available in the **Import Document** dialog box, if the message has attachments.  If **Yes** is selected for the **Store messages in MSG Format** option and **No** is selected for the **Store attachments separately** option, all attachments are stored in the same *.msg file as the message they are attached to and the Attachment button is not available in the **Import Document** dialog box.

Tip: For a complete description of the Outlook Integration import functionality, see the **Usage** chapter in one of the **Integration for Microsoft Outlook** module reference guides.

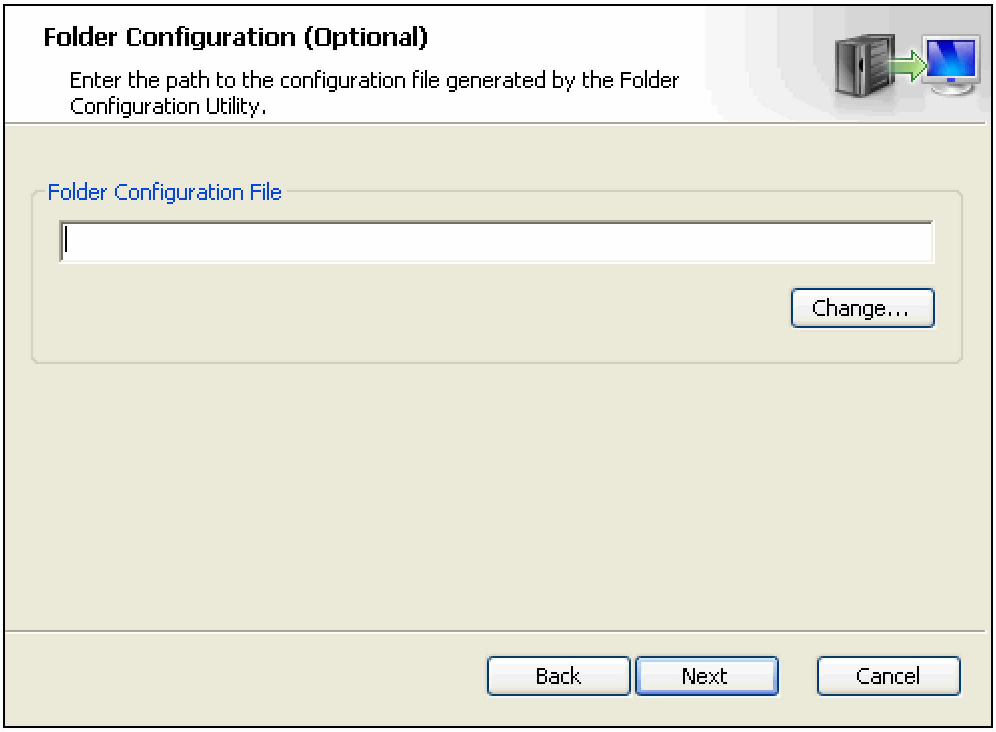
21. Click **Next**. Depending on the options you selected on the **Outlook Integration Toolbar Configuration** page, the **Client Executable Button Configuration** page may be displayed.



22. Enter the path to the OnBase Client executable in the **Executable Path** field, or click the **Browse** button next to the field to browse to the location of your OnBase Client executable.
23. Enter any OnBase command line switches to append to the OnBase Client when it is launched from Outlook in the **Executable Command Line Switches** field.

Tip: For more information on command line switches, see the **Command Line Switches** module reference guide.

24. Click **Next**. The **Folder Configuration (Optional)** page is displayed.



25. If you created a folder configuration file using the Folder Configuration Utility, enter the full path to it in the **Folder Configuration File** field, or click **Change** to navigate to the file and select it. If you did not create a folder configuration file, leave the **Folder Configuration File** field empty.

Note: See Outlook Folder Configuration Utility on page 61 for details on using the Folder Configuration Utility.

26. Click **Next**. The **Ready to install** page is displayed.
27. Click **Install**.

Changing the Language and Culture Settings

If you want to change the language and culture settings of the modules installed, you must edit the corresponding ***.exe.config** or ***.dll.config** file in the installation location of the module. If these settings are not changed, the default operating system language and culture settings are used for the module.

Note: **Template Builder** always uses the default operating system language and culture settings.

To change the language and culture settings:

1. Locate the installation location of the module and open the corresponding ***.exe.config** or ***.dll.config** file in a plain-text editor, such as Notepad. Do not use a binary-text editor, such as Word, to edit this file.
2. Locate the **<Hyland.Canvas>** node.
3. Remove the comment tags (**<!--** and **-->**) from the **<DisplayLanguage>** node to enable it and display the module in a language different from the default operating system language. If this node remains commented, the default operating system language is used for the module.
4. Replace the value of the **<DisplayLanguage>** node with the language name of the language you want the module displayed in, such as **de-DE** for German or **fr-FR** for French (for more information on language names, see **http://msdn.microsoft.com/en-us/library/ms533052(VS.85).aspx**). The default value of this node is **en-US**.
5. Remove the comment tags (**<!--** and **-->**) from the **<Culture>** node to enable it and override the default Windows locale settings. If this node remains commented, the module displays dates, times, currencies, and numeric values using the default Windows locale settings configured in the Windows Regional and Language Options.
6. Replace the value of the **<Culture>** node with the culture name of the culture you want the module to use, such as **de-DE** for German or **fr-FR** for French. For a complete list of supported cultures, see the **Web Server** documentation. The default value of this node is **en-US**.
7. Save and close the file.

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.

Option	Description
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.

Controlling the Installer from the Command Line

The Hyland Office Integration installers can be run from an installation CD or a local drive.

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.

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 Hyland Office Integration installers.

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

Note: Property values passed through the command line are case-sensitive. For example, a property value is listed as **true** in one of the following sections. To use this property value, ensure you enter **true** with all lowercase letters.

Note: Due to customizable installation settings, command line scripts vary greatly and depend upon system configuration. Many command line properties have dependencies upon other properties, which, when absent from the script, may cause the installation to fail. For this reason, sample scripts are not included in these instructions. For assistance with creating a personalized command line script, contact your first line of support.

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 the installer using the **ADDLOCAL** property. The table below lists the feature names for each component in the Hyland Office Integration installers.

The **ADDLOCAL** property is appended to the end of the install command line, as shown here for the Office 2019 Integration installer: **msiexec /i "Office 2019 Integration x86.msi" ADDLOCAL=Word_AddIn, Excel_OfficeAddIn_Module**

This example installs the Microsoft Word and Excel add-ins. It also installs any components required by the features selected.

Note: Feature names are case sensitive and must be added to the command line exactly as they appear in this table. The associated properties listed may also have to be included on the command line in order to configure the installed component. For details on the associated properties see, Property Names on page 91.

Component	Feature Name
Word 20XX Add-In	Word_AddIn
PowerPoint 20XX Add-In	Powerpoint_AddIn
Excel 20XX Add-In	Excel_OfficeAddIn_Module
Excel Report Services Add-In	Excel_ReportServices_Module

Component	Feature Name
Outlook 20XX Integration	Outlook_Integration_Module
WorkView Integration for Outlook	Outlook_WorkviewIntegration_Module
Template Builder 20XX	Template_Builder

Installation Directory

All components are installed to the same directory. The following default locations are used:

- **Office 20XX (32-bit)**: C:\Program Files\Hyland\Office Integration\Office 20XX\
- **Office 20XX (64-bit)**: C:\Program Files (x86)\Hyland Office Integration\Office 20XX\

Note: In these example default locations, XX designates the year of the integration you have installed.

The default locations can be changed by using the following properties:

- **Office 2019 (32- or 64-bit):** OFFICE2019_FILES

For example, to change the default location of the Office 2019 files, add the following to the command line: **OFFICE2019_FILES="C:\MyInstall\Office2019\"**

Associated Properties

The following properties are associated with all of the features:

- SERVICE_LOCATION_DATA_SOURCE
- SERVICE_LOCATION_DISPLAY_NAME
- SERVICE_LOCATION_NT_AUTH
- SERVICE_LOCATION_SERVICE_PATH
- SERVICE_LOCATION_IDP_ENABLED_20XX (where XX designates the year of the integration installed)
- SERVICE_LOCATION_IDP_URL_20XX (where XX designates the year of the integration installed)

Note: Additional configuration is required to enable IdP support for the Hyland Office Products Installers. For more information, see the **Identity and Access Management Services** module reference guide.

Outlook Integration Associated Properties

The following properties are associated with the **Outlook Integration** and **WorkView Integration for Outlook** features:

- OUTLOOKINTEGRATION_ADMIN_CONFIGURATION_FILE
- OUTLOOKINTEGRATION_AUTO_SELECT_ATTACHMENTS
- OUTLOOKINTEGRATION_CLIENT_EXE_FILE_PATH

- OUTLOOKINTEGRATION_CREATE_FORMS
- OUTLOOKINTEGRATION_DOCUMENT_DATE_SENT_DATE
- OUTLOOKINTEGRATION_ENABLE_IMPORT_FROM_FILE
- OUTLOOKINTEGRATION_EXE_COMMANDLINE_SWITCHES
- OUTLOOKINTEGRATION_HELP_BUTTON_OPTION
- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION
- OUTLOOKINTEGRATION_KEEP_MESSAGES
- OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION
- OUTLOOKINTEGRATION_MOVE_MESSAGES
- OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION
- OUTLOOKINTEGRATION_READING_GROUPS_BUTTON
- OUTLOOKINTEGRATION_REMOVE_MESSAGES
- OUTLOOKINTEGRATION_RETRIEVAL_BUTTON_OPTION
- OUTLOOKINTEGRATION_SHOW_IMAGING
- OUTLOOKINTEGRATION_STORE_MESSAGE_MSG
- OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY
- OUTLOOKINTEGRATION_UPDATE_CLIENT_DEFAULT_OPTION
- OUTLOOKINTEGRATION_USER_FOLDER_CONFIGURATION_OPTION
- OUTLOOKINTEGRATION_USER_TOOLBAR_CONFIGURATION_OPTION
- OUTLOOKINTEGRATION_WORKFLOW_BUTTON_OPTION
- OUTLOOKINTEGRATION_WORKFLOW_UPDATE_NOTIFICATION

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 sections below list the property names available and the corresponding features that use them.

SERVICE_LOCATION_DATA_SOURCE

The data source name for the appropriate data source.

For example: **SERVICE_LOCATION_DATA_SOURCE="Data Source Name"**

Required when adding:

- Word_AddIn
- Powerpoint_AddIn
- Excel_OfficeAddIn_Module
- Excel_ReportServices_Module
- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module
- Template_Builder

SERVICE_LOCATION_DISPLAY_NAME

The user friendly name of the service location.

For example: **SERVICE_LOCATION_DISPLAY_NAME="My Service Location"**

Required when adding:

- Word_AddIn
- Powerpoint_AddIn
- Excel_OfficeAddIn_Module
- Excel_ReportServices_Module
- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module
- Template_Builder

SERVICE_LOCATION_NT_AUTH

Set to **true** to use NT/LDAP with the components installed. If this property is not included the default value of **false** is set and NT/LDAP authentication is not used.

Note: In order to use NT or LDAP authentication, the Data Source configured must also be configured for NT or LDAP authentication.

For example: **SERVICE_LOCATION_NT_AUTH="true"**

Optional when adding:

- Word_AddIn
- Powerpoint_AddIn
- Excel_OfficeAddIn_Module
- Excel_ReportServices_Module
- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module
- Template_Builder

SERVICE_LOCATION_SERVICE_PATH

The full URL to the OnBase Application Server service page or Web Server address.

An Application Server URL should use the following format: **http://machinename/AppServer/Service.asmx**

A Web Server URL should use the following format: **http://machinename/AppNet/Service.asmx**

Note: Only Application Server and Web Server URLs ending in **.asmx** and using SOAP can be used with the Office integrations. For example, a remote service path ending in **.rem** is not valid.

Required when adding:

- Word_AddIn
- Powerpoint_AddIn
- Excel_OfficeAddIn_Module
- Excel_ReportServices_Module
- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module
- Template_Builder

OUTLOOKINTEGRATION_ADMIN_CONFIGURATION_FILE

The full path to the folder configuration file created using the **Folder Configuration Utility**.

For example:
OUTLOOKINTEGRATION_ADMIN_CONFIGURATION_FILE="C:\MyFiles\MyOutlook.confg"

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

If you did not create a folder configuration file, do not include this property.

Note: See Outlook Folder Configuration Utility on page 61 for details on using the Folder Configuration Utility.

OUTLOOKINTEGRATION_CREATE_FORMS

Set to **true** to make the **Forms** button available on the Outlook Integration toolbar. This function allows users to create E-Forms or Unity Forms from Outlook. If this property is not included, the default value of **false** is set and the users cannot create E-Forms or Unity Forms from Outlook.

OUTLOOKINTEGRATION_ENABLE_IMPORT_FROM_FILE

Set to **true** to make the **Import from File** button available on the Outlook Integration toolbar. This function allows users to import selected documents into OnBase. If this property is not included, the default value of **false** is set and users cannot import selected documents to OnBase from Outlook.

OUTLOOKINTEGRATION_HELP_BUTTON_OPTION

Set to **true** to make the **Help** button available on the Outlook Integration toolbar. This function provides users access to the relevant OnBase help files. If this property is not included the default value of **false** is set and the help files are not available to users from the Outlook Integration toolbar.

For example: **OUTLOOKINTEGRATION_HELP_BUTTON_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

Set to **true** to make the **Import** button available on the Outlook Integration toolbar. This function allows users to import messages directly to OnBase from Outlook. If this property is not included the default value of **false** is set and users cannot directly import email messages to OnBase from Outlook.

For example: **OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

If this property is set to **true** one of the following related properties must also be set to **true**:

- OUTLOOKINTEGRATION_KEEP_MESSAGES
- OUTLOOKINTEGRATION_MOVE_MESSAGES
- OUTLOOKINTEGRATION_REMOVE_MESSAGES

If this property is set to **true** the following related properties are optional:

- OUTLOOKINTEGRATION_AUTO_SELECT_ATTACHMENTS
- OUTLOOKINTEGRATION_DOCUMENT_DATE_SENT_DATE
- OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION
- OUTLOOKINTEGRATION_STORE_MESSAGE_MSG
- OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY

OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION

Set to **true** to make the **Launch Client** button is available on the Outlook Integration toolbar. This function allows users to launch the OnBase Client directly from Outlook. If this property is not included the default value of **false** is set and users cannot launch the OnBase Client directly from Outlook.

For example: **OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

If this property is set to **true** the following related property is required:

- OUTLOOKINTEGRATION_CLIENT_EXE_FILE_PATH

If this property is set to **true** the following related property is optional:

- OUTLOOKINTEGRATION_EXE_COMMANDLINE_SWITCHES

OUTLOOKINTEGRATION_READING_GROUPS_BUTTON

Set to **true** to make the **My Reading Groups** button available on the Outlook Integration toolbar. This function allows users to open the **My Reading Groups** interface. This property is not included, the default value of **false** is set and users cannot display the **My Reading Groups** interface from Outlook.

OUTLOOKINTEGRATION_RETRIEVAL_BUTTON_OPTION

Set to **true** to make the **Retrieval** button available on the Outlook Integration toolbar. This function allows users to retrieve documents archived in OnBase directly from Outlook. If this property is not included the default value of **false** is set and users cannot retrieve documents archived in OnBase directly from Outlook.

For example: **OUTLOOKINTEGRATION_RETRIEVAL_BUTTON_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_SHOW_IMAGING

Set to **true** to make the **Imaging** ribbon group, which includes the **Send to Scan Queue** and **Batch Processing** buttons, available on the Outlook Integration toolbar. These functions allow users to route messages and attachments into a scan queue or batch process. If this property is not included, the default value of **false** is set and users cannot access these functions from Outlook.

Note: The **Send to Scan Queue** option does not populate mail System Keywords (such as MAIL To).
If you need to populate mail System Keywords, open the document in Workflow and use the **Set Property from Email Metadata** action. For more information, see the **Workflow** module reference guide.

OUTLOOKINTEGRATION_WORKFLOW_BUTTON_OPTION

Set to **true** to make the **Workflow** button available on the Outlook Integration toolbar. This function allows users to launch the OnBase Workflow Client directly from Outlook. If this property is not included the default value of **false** is set and users cannot launch the OnBase Workflow Client directly from Outlook.

For example: **OUTLOOKINTEGRATION_WORKFLOW_BUTTON_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_WORKFLOW_UPDATE_NOTIFICATION

Set to **true** to update Workflow email notifications after a task is executed, to include specific information on the ad hoc task that was executed. If this property is not included the default value of **false** is set and Workflow email notifications are not updated.

For example: **OUTLOOKINTEGRATION_WORKFLOW_UPDATE_NOTIFICATION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_UPDATE_CLIENT_DEFAULT_OPTION

If set to **true**, the default settings of this deployment instance override the settings of clients installed using an earlier version of this deployment instance. For example, this option must be set to true to overwrite previously configured command-line switches. If this property is not included the default value of **false** is set and the settings of clients using an earlier version of the deployment instance can be used.

For example: **OUTLOOKINTEGRATION_UPDATE_CLIENT_DEFAULT_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

If this property is set to **true** the following related property must also be set to **true**:

- OUTLOOKINTEGRATION_USER_TOOLBAR_CONFIGURATION_OPTION

OUTLOOKINTEGRATION_USER_FOLDER_CONFIGURATION_OPTION

Set to **true** to allow users to change the configuration of their Outlook folders. If this property is not included the default value of **false** is set and users cannot change the configuration of their Outlook folders.

For example: **OUTLOOKINTEGRATION_USER_FOLDER_CONFIGURATION_OPTION= "true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_USER_TOOLBAR_CONFIGURATION_OPTION

Set to **true** to allow users to change the default configuration of the Outlook Integration toolbar. If this property is not included the default value of **false** is set and users cannot change the default configuration of the Outlook Integration toolbar.

For example: **OUTLOOKINTEGRATION_USER_TOOLBAR_CONFIGURATION_OPTION= "true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_AUTO_SELECT_ATTACHMENTS

Set to **true** to automatically select all email attachments when importing email messages into OnBase. If this property is not included the default value of **false** is set and email attachments are not automatically selected when importing email messages into OnBase.

Note: With either setting, users can still modify which email attachments are actually included before the message is imported into OnBase.

For example: **OUTLOOKINTEGRATION_AUTO_SELECT_ATTACHMENTS="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Expected when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

OUTLOOKINTEGRATION_DOCUMENT_DATE_SENT_DATE

Set to **true** to use the date that an email was sent as the **Document Date** for the message when it is imported into OnBase. If this property is not included the default value of **false** is set and the date the email message was imported into OnBase is used as the **Document Date**.

Note: If this property is set to **true** and an email does not have a **Received Time** value, the current date is used.

For example: **OUTLOOKINTEGRATION_DOCUMENT_DATE_SENT_DATE="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Expected when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

OUTLOOKINTEGRATION_KEEP_MESSAGES

Set to **true** to keep email messages that are imported into OnBase in the same Outlook folder after being imported.

If this property is not included the default value of **false** is set and either **OUTLOOKINTEGRATION_MOVE_MESSAGES** or **OUTLOOKINTEGRATION_REMOVE_MESSAGES** must be set to **true**.

Note: This setting does not apply to email messages imported into OnBase using an Auto Import Folder.

For example: **OUTLOOKINTEGRATION_KEEP_MESSAGES="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

OUTLOOKINTEGRATION_MOVE_MESSAGES

Set to **true** to move email messages that are imported into OnBase to a different Outlook folder after being imported.

If this property is not included the default value of **false** is set and either **OUTLOOKINTEGRATION_KEEP_MESSAGES** or **OUTLOOKINTEGRATION_REMOVE_MESSAGES** must be set to **true**.

Note: This setting does not apply to email messages imported into OnBase using an Auto Import Folder.

For example: **OUTLOOKINTEGRATION_MOVE_MESSAGES="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

If this property is set to **true** the following related property is required:

- OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION

OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION

The Outlook folder to move imported email messages to if **OUTLOOKINTEGRATION_MOVE_MESSAGES** is set to **true**.

Note: This setting does not apply to email messages imported into OnBase using an Auto Import Folder.

For example: **OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION="Imported Messages"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_MOVE_MESSAGES

OUTLOOKINTEGRATION_REMOVE_MESSAGES

Set to **true** to delete email messages after they are imported into OnBase.

If this property is not included the default value of **false** is set and either **OUTLOOKINTEGRATION_KEEP_MESSAGES** or **OUTLOOKINTEGRATION_MOVE_MESSAGES** must be set to **true**.

Note: This setting does not apply to email messages imported into OnBase using an Auto Import Folder.

For example: **OUTLOOKINTEGRATION_REMOVE_MESSAGES="true"**

Required when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

OUTLOOKINTEGRATION_STORE_MESSAGE_MSG

Set to **true** to archive messages in OnBase in their native Outlook format (*.msg). When messages stored in this format are retrieved, they are displayed in the Outlook message viewer instead of the OnBase document viewer. However, this allows users to access all of the same Outlook functionality that is available when the message is opened in Outlook (e.g., forwarding, replying, etc.).

Set to **false** to archive messages in the format in which the message was created (e.g., plain text, rich text, or HTML). When messages are retrieved, they are displayed in the OnBase document viewer. Attachments and messages are stored as separate documents and are retrieved in their respective file formats.

Note: When this option is set to **true**, users are unable to view the message that is being imported by clicking the envelope icon in the **Import Mail Document** dialog box. This may prevent messages from being indexed incorrectly.

For example: **OUTLOOKINTEGRATION_STORE_MESSAGE_MSG="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

If this property is set to **true** the following related property is required:

- OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY

OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY

Set to **true** to store attachments as separate documents from the messages they are attached to when **OUTLOOKINTEGRATION_STORE_MESSAGE_MSG** is also set to **true**. Attachments are stored and retrieved in their respective file formats and the **Attachment(s)** button is available in the **Import Mail Document** dialog box, if the message has attachments.

Set to **false** to store all attachments in the same *.msg file as the message they are attached to when **OUTLOOKINTEGRATION_STORE_MESSAGE_MSG** is also set to **true**. The **Attachment(s)** button is not available in the **Import Mail Document** dialog box.

Note: This property does not need to be set if **OUTLOOKINTEGRATION_STORE_MESSAGE_MSG** is set to **false**. If this property is not included it is set to the default value of **false**.

For example: **OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY="false"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Optional when the following related property is set to **true**:

- OUTLOOKINTEGRATION_STORE_MESSAGE_MSG

OUTLOOKINTEGRATION_CLIENT_EXE_FILE_PATH

The full path to the OnBase Client executable.

For example: **OUTLOOKINTEGRATION_CLIENT_EXE_FILE_PATH="C:\Program Files\Hyland\Client\"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following related property is set to **true**:

- OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION

OUTLOOKINTEGRATION_EXE_COMMANDLINE_SWITCHES

Any OnBase command line switches to append to the OnBase Client when it is launched from Outlook.

Tip: For more information on command line switches, see the **Command Line Switches** section in the **System Administration** module reference guide.

For example: **OUTLOOKINTEGRATION_EXE_COMMANDLINE_SWITCHES="-SCHED"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Optional when the following related property is set to **true**:

- OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION

OnBase®

Foundation EP5

Document Composition

Administration Guide

Foundation EP5

Before You Begin

In order to ensure that the templates you create for documents are as thorough as possible, and contain all necessary information, consider the OnBase elements you may need to configure before creating templates:

- What is the purpose of this template?
- Who will be creating a document from it?
- Who is best suited to create this template?

  For example, should one user create the letter portion of the template, then allow another user to create and configure Placeholders and Template Options?
- What existing information must be pulled in from OnBase?

  For example:
  - Keyword Values
  - HTML Forms
  - VBScripts
  - WorkView Attributes
- Does new information have to be created in OnBase before beginning to configure a template?
- How will the layout and design of information look?
- Where will the document be saved after it has been completed?
- Should the document be saved in one or multiple file formats?
- Should VBScripts be used to automate the document creation process?

Answering these questions before beginning template group and template creation allows for organized ease-of-use when creating, managing, and configuring Placeholders.

Also:

- Ensure that the **Application Server Path** is configured if you plan on using Document Composition within the OnBase Client. See Application Server Overview on page 103 for more information.
- Ensure that the proper User Group privileges are configured. See User Group Privileges on page 104 for more information.

- If you want to allow tracking of changes to a template document, you must be licensed for the EDM Services module. The **SYS Document Template** Document Type, where Document Composition templates are stored, must be configured as revisable. For more information about configuring revisable Document Types, see the EDM Services documentation.

Note: If the **SYS Document Template** Document Type is not revisable, a new copy of the template will be saved to the **SYS Document Template** Document Type each time a template is saved.

Application Server Overview

The Application Server is required to allow certain modules to communicate with OnBase. This is required to ensure consistent functionality across all interfaces so that there is no difference when accessing OnBase using the OnBase Client or Web Client.

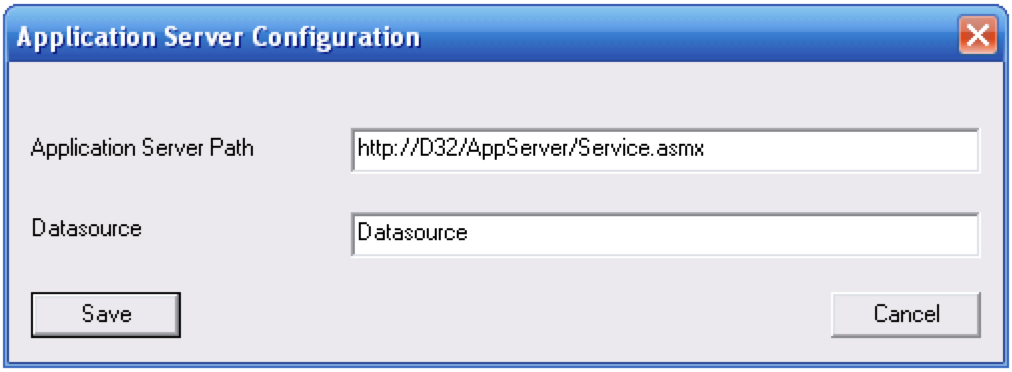
Note: You do not need a separate license to use the Application Server.

Defining the Application Server

Certain modules and functionalities found within the OnBase Client and Configuration module require the use of the Application Server. To use these modules and functionalities within OnBase Client and Configuration module, you must define the Application Server.

To configure the Application Server:

1. In the Configuration module, select **Utils | Application Server**. The **Application Server Configuration** dialog box is displayed:



2. Enter the **Application Server Path**.

   For a typical installation, the path will be like the following: http://hostname/AppServer/Service.asmx. The path can be up to 255 characters.

3. Enter the appropriate **Datasource** name that the Application Server will use.
4. Click **Save**.

Caution: When the Application Server is reset, all currently running Clients on a single workstation that is connected to the Application Server must be reset. If the Clients are not reset, any further attempted connections made to the Application Server will fail.

User Group Privileges

In order to configure templates, a user must belong to a User Group that has the **Document Composition Administration** privilege.

In order to create documents, a user must belong to a User Group that has the **Word Document Composition** privilege.

Both of these privileges are assigned in the Configuration module. Select **User | User Groups / Rights**. Choose the appropriate User Group and click **Privileges**.

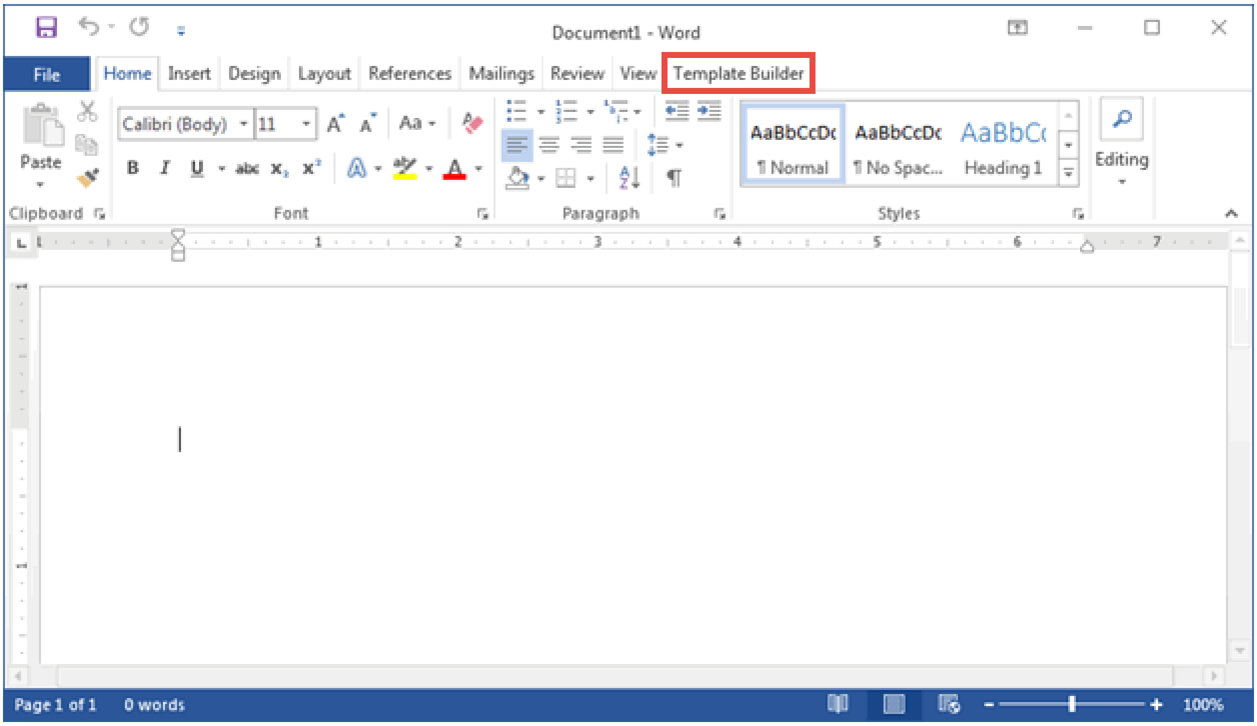
Log Privileges

In order to create Document Composition reports, the user must be given the correct log privileges. These privileges are assigned in the Configuration module. To give a user log privileges, select **User | User Groups / Rights**. Choose the appropriate User Group and click **Log Privileges**:

- Select the **View** check box next to **Document Composition Configuration Log** to give users permission to view Document Composition configuration log information. Select the **Purge** check box next to **Document Composition Configuration Log** to give users permission to purge Document Composition configuration log information.
- Select the **View** check box next to **Document Composition Runtime Log** to give users permission to view Document Composition runtime log information. Select the **Purge** check box next to **Document Composition Runtime Log** to give users permission to purge Document Composition runtime log information.

Accessing the Template Builder

The Template Builder, which is the Document Composition configuration component, is accessed from the **Template Builder** tab in Microsoft Word:



If the **Template Builder** tab is not available, the Template Builder is not installed. If you have been provided with a URL or UNC path, click the path to install the Template Builder by deploying the installation package to your workstation. When the installation is confirmed, click **Close**, and launch Microsoft Word to access the **Template Builder** tab.

Note: When the installation package is modified by your system administrator, you are prompted to install a new version of the Template Builder after opening Microsoft Word.

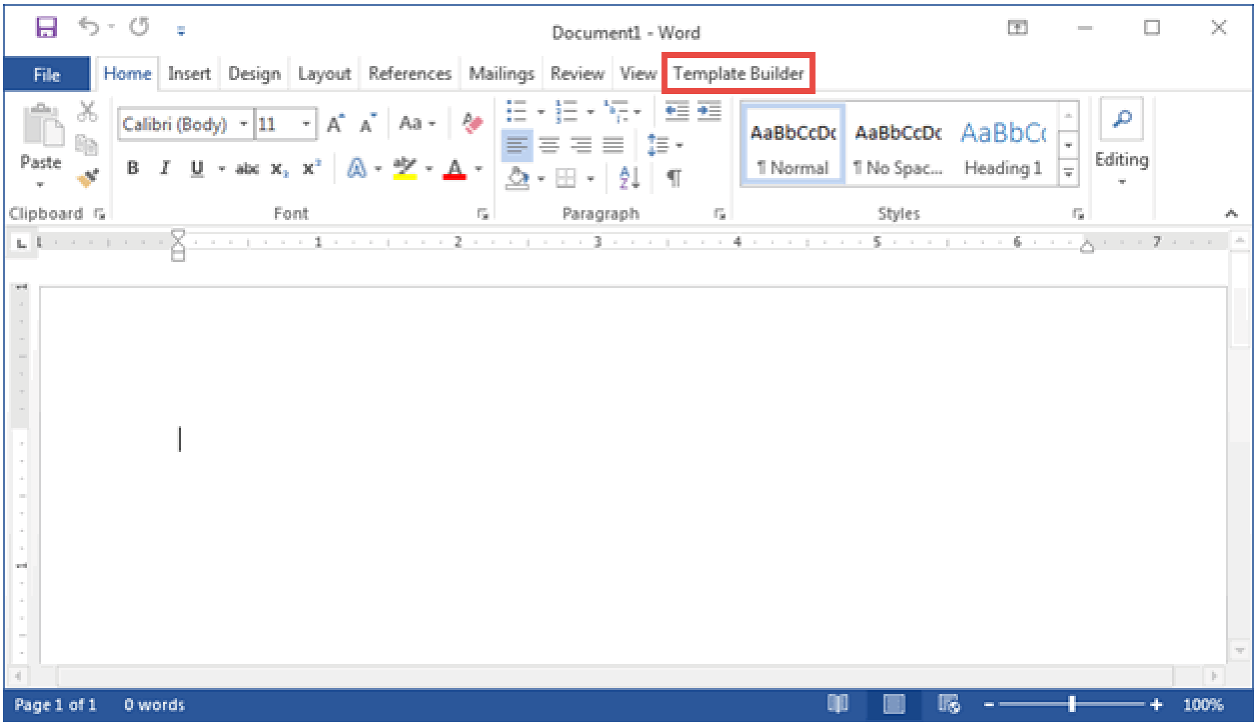
If you have not been provided with a URL or UNC path, contact your system administrator.

Template Groups and Templates

Before you can create documents with the Document Composition module, you must create and configure template groups and templates.

Note: Before creating and configuring template groups and templates, ensure that you have reviewed the information in Before You Begin on page 102. To use, create, or modify a template, users must have rights to the template group and the template.

Template group and template creation and configuration is done in Microsoft Word, on the **Template Builder** tab:



See the following topics:

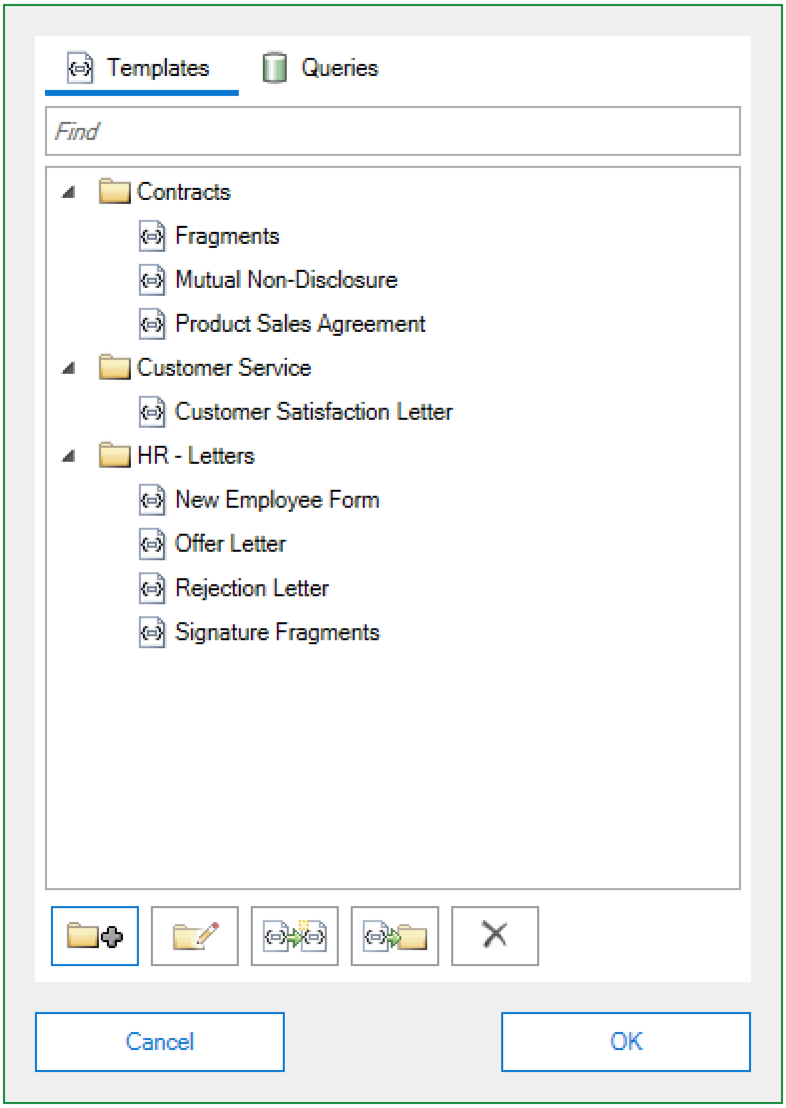
- Creating Template Groups on page 106
- Editing Template Groups on page 110
- Deleting Template Groups on page 111
- Creating Templates on page 112
- Viewing and Editing Templates on page 115
- Copying Templates on page 117
- Moving Templates on page 119
- Deleting Templates on page 121
- Configuring Template Options on page 122

Creating Template Groups

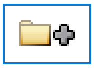
To create a new template group:

1. Click **Control Panel**.
2. If prompted, login to OnBase.

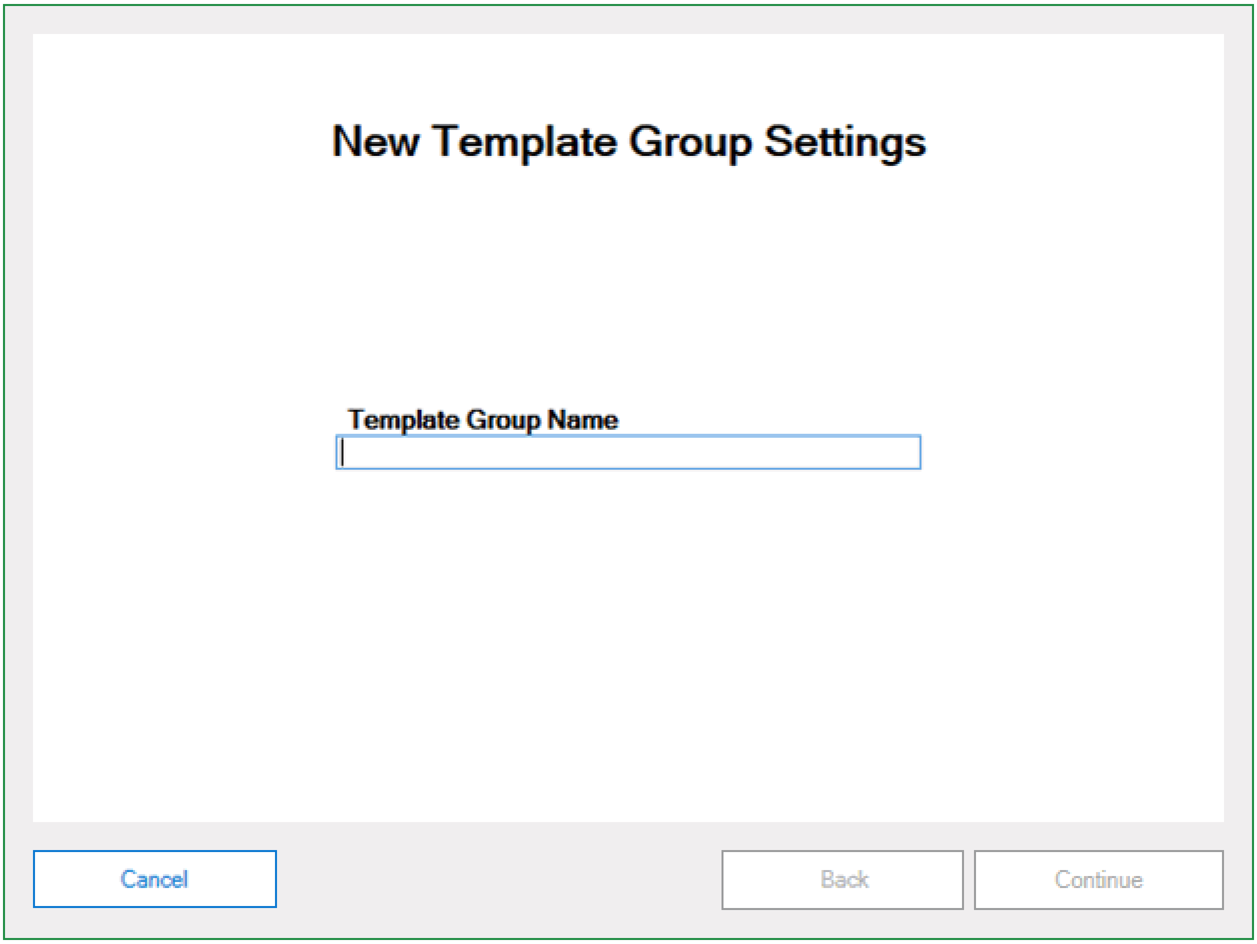
3. The **Control Panel** dialog box is displayed:



4. Click **New Template Group**:



5. The **New Template Group Settings** dialog box is displayed:

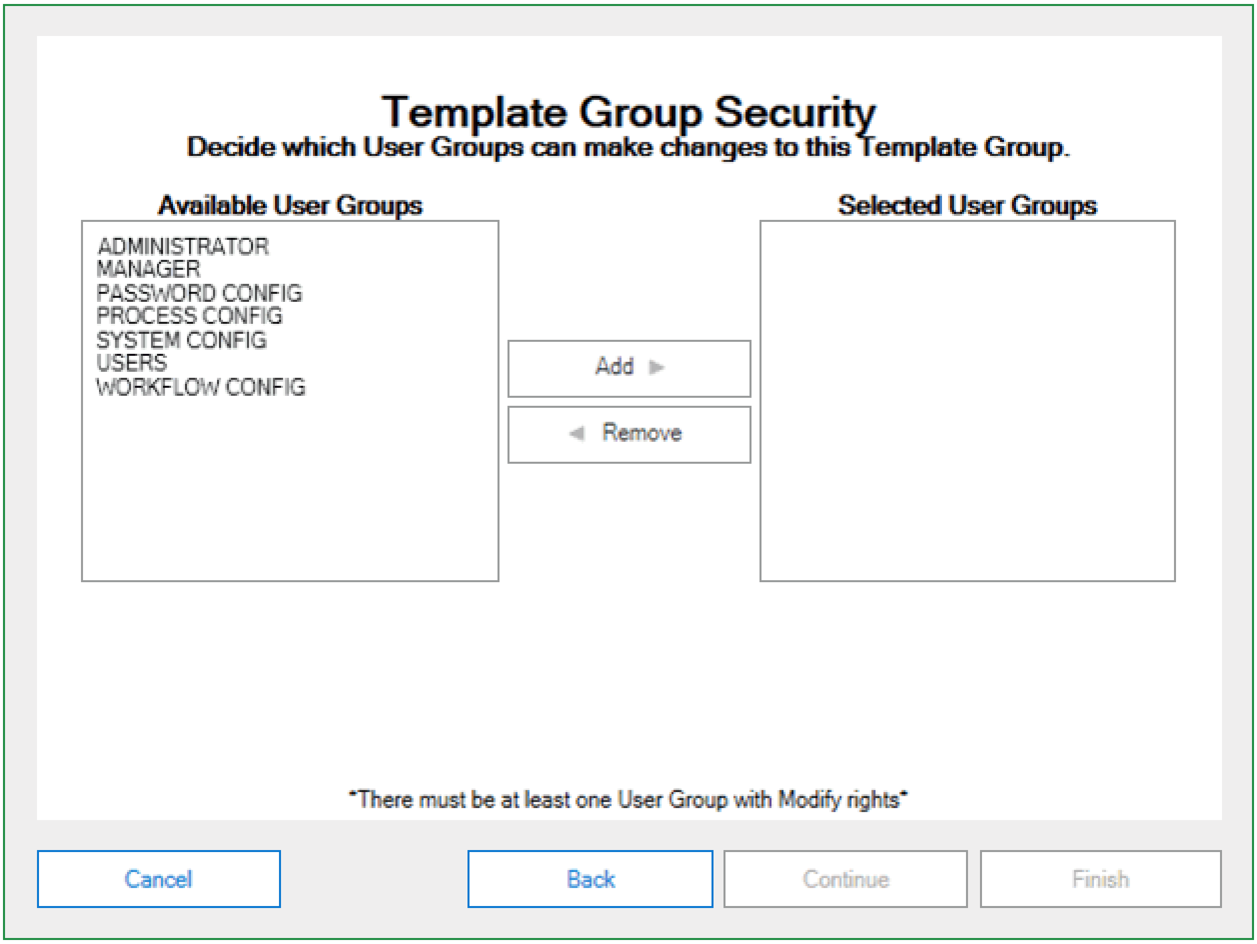


6. Type a name in the **Template Group Name** field.

Note: This name is limited to 100 characters and must be unique.

7. Click **Continue**.

8. The **Template Group Security** dialog box is displayed:



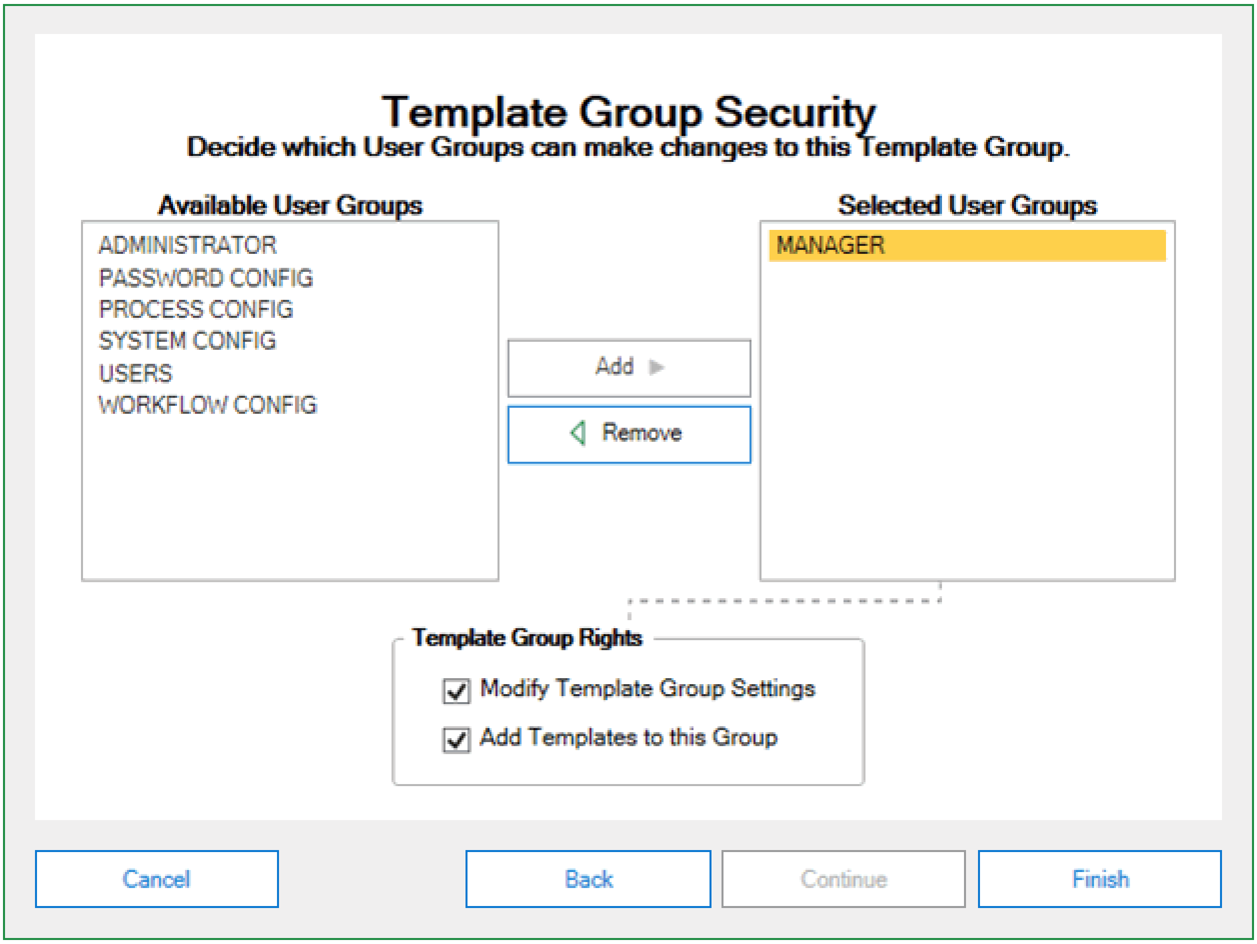
9. Select User Groups in the **Available User Groups** list and click **Add** to add them to the **Selected User Groups** list.

   Remove User Groups from the **Selected User Groups** list by clicking **Remove** to move them to the **Available User Groups** list.

Note: By default, the MANAGER User Group can access and has rights to all Template Groups, regardless of whether it is displayed in the **Selected User Groups** list.

Note: Only User Groups that have either Document Composition Administration privileges or Word Document Composition privileges are shown in the **Available User Groups** list.

10. The **Template Group Rights** options are displayed:



11. Select the check box(es) that apply to the rights that should be assigned to the User Group:
    - **Modify Template Group Settings** - Select to allow a User Group to edit template group configuration.
    - **Add Templates to this Group** - Select to allow a User Group to create and copy templates for the template group.

Note: You must assign at least one User Group **Modify** rights.

12. Click **Finish**.

Editing Template Groups

Template groups can be edited by a member of a User Group that has been assigned the **Modify Template Group Settings** right in the **Template Group Rights** dialog box.

To edit a template group:

1. Click **Control Panel**.
2. Select a template group from the **Templates** tab.
3. Click **Edit Template Group**:

4. Follow steps 6 to 12 in Creating Template Groups on page 106 to edit the template group settings. You can click Finish at any point to save changes to the template group.

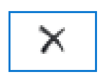
Deleting Template Groups

Template groups can be deleted by a member of a User Group that has been assigned the **Modify Template Group Settings** right in the **Template group Rights** dialog box.

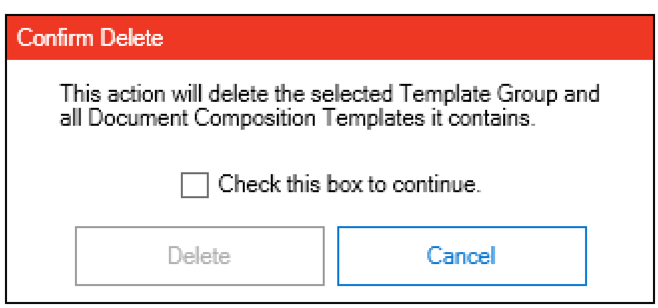
Caution: When you delete a template group, you delete the template group and all templates contained in the template group.

To delete a template group:

1. Click **Control Panel**.
2. Select a template group from the **Templates** tab.
3. Click **Delete**:



4. You are prompted to confirm that you want to delete the template group.
5. Click **Delete** to delete the template group or click **Cancel** to retain the template group.
6. If you clicked **Delete**, you are prompted to confirm that you want to delete the template group by the **Confirm Delete** dialog box:



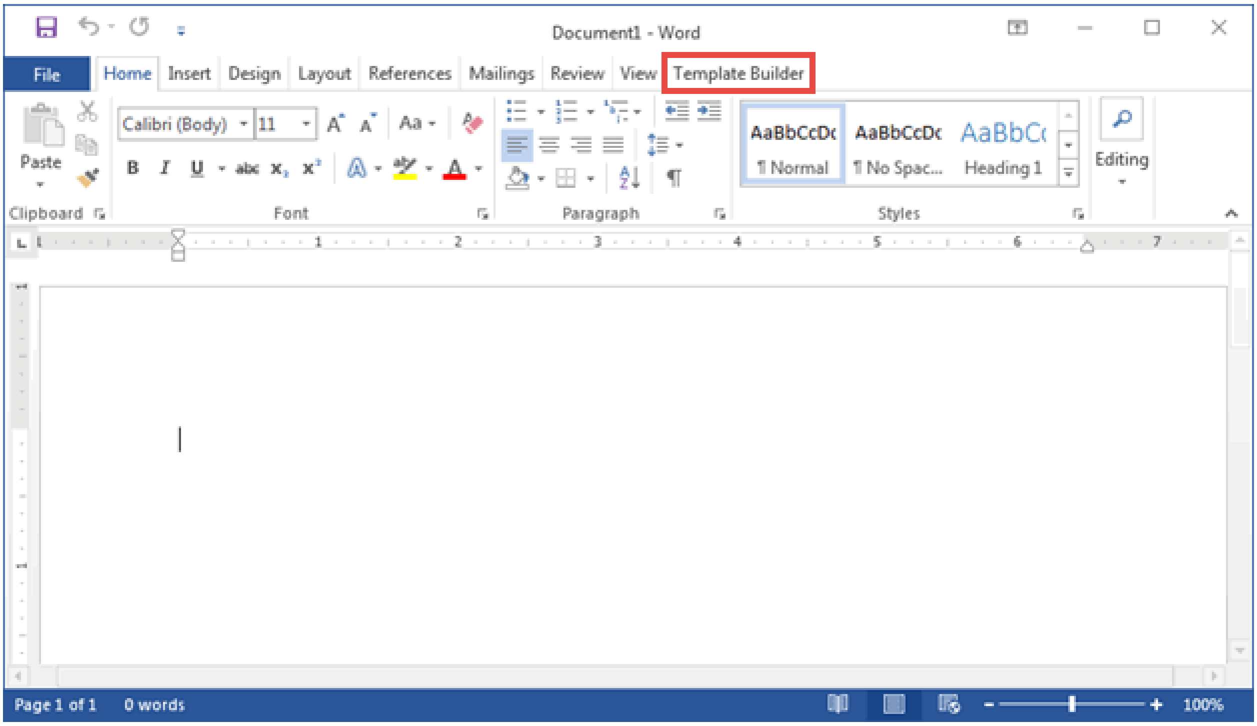
7. Select the **Check this box to continue.** check box and click **Delete** to delete the template group, or click **Cancel** to retain the template group.

Creating Templates

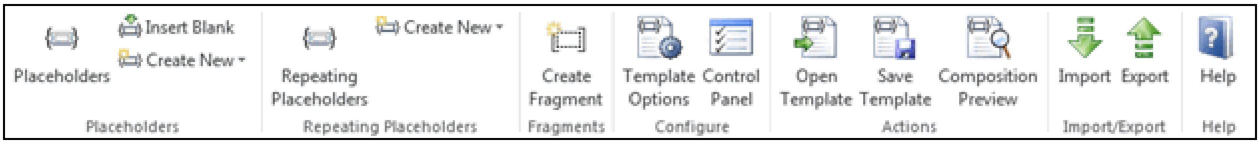
Once a template group is created, templates can be created and stored within that template group.

To create a template:

1. Open Word.
2. Click the **Template Builder** tab:

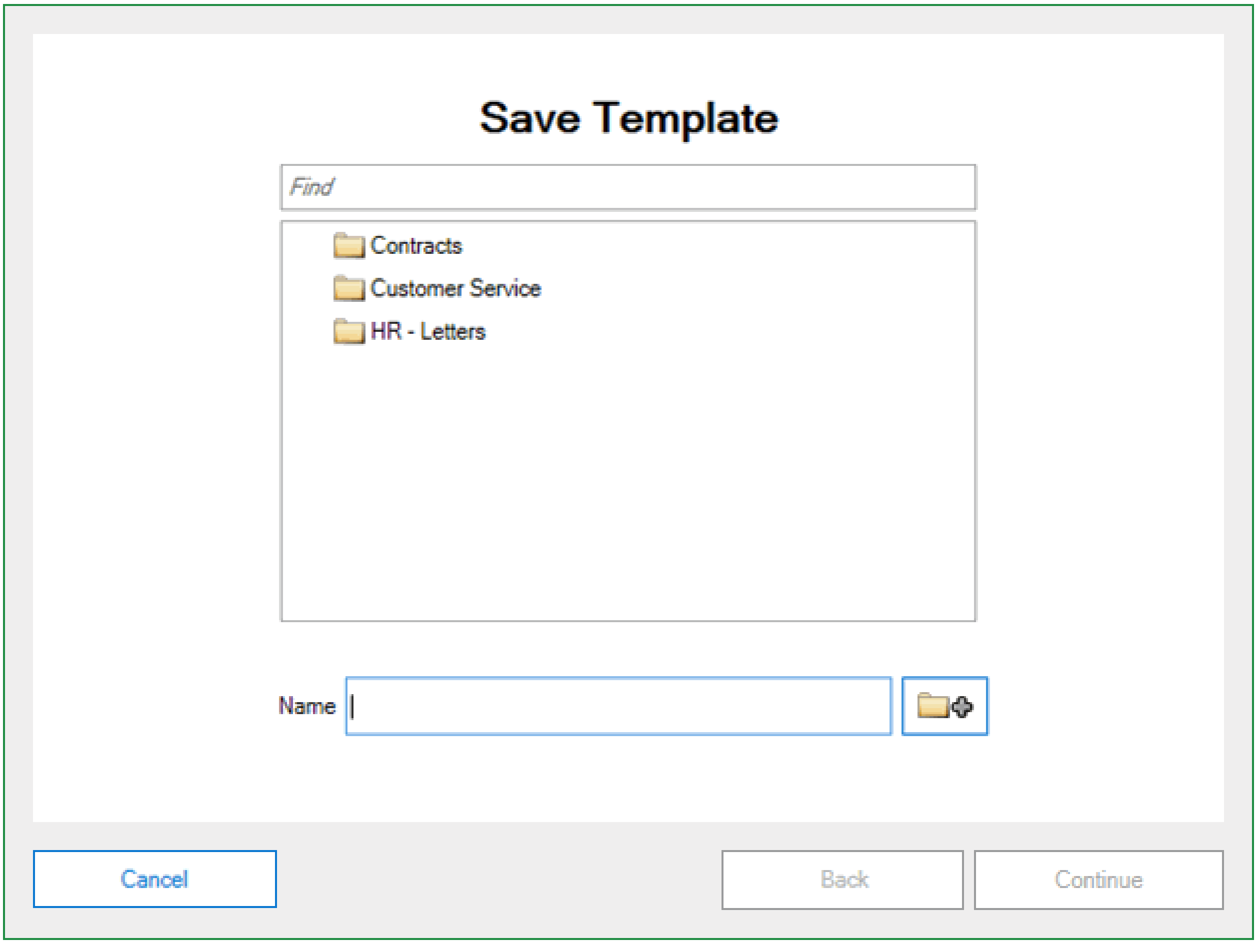


The Template Builder ribbon and a new Document Composition template are displayed:



3. Click **Save Template**.

   The **Save Template** dialog box is displayed:



4. Select the template group that the template should reside in.

   To filter the list, type the name of the template group the template should reside in. The list is filtered as you type.

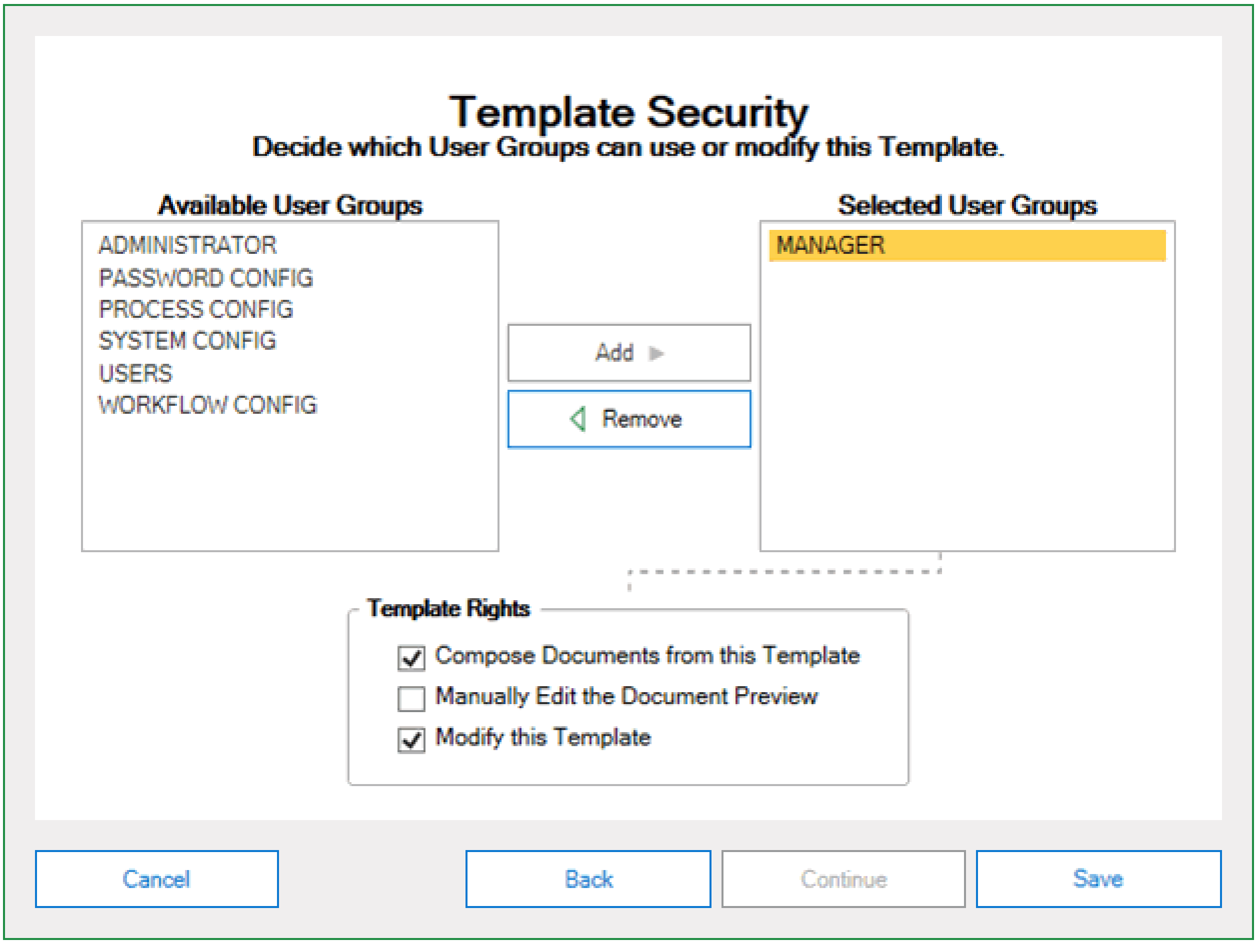
Tip: You can type any part of the template group name to yield results. For example, if you are searching for **HR - Letters**, you can type **letter** to display any template group names containing **letter**.

5. Type a name for the template in the **Name** field.

Caution: Template names must be unique, even across template groups.

Note: Saved templates are stored in the **SYS - Document Template** Document Type. The Keyword Type **Description** is assigned by default to this Document Type. Depending on your configuration, this Keyword Type has a maximum value of up to 200 characters. By default, each template is given the **Description** Keyword Value of “COMPOSITION TEMPLATE - [TEMPLATE NAME]”. Due to this default **Description** Keyword Value format, the character limit of the template **Name** is 23 characters fewer than your system’s configured character limit for the **Description** Keyword Type.

6. Click **Continue**.
   The **Template Security** dialog box is displayed:



7. Select User Group names in the **Available User Groups** list and click **Add** to add them to the **Selected User Groups** list on the right. By default, your User Group is displayed in this list.

   Remove User Group names from the **Selected User Groups** list by clicking **Remove** to move the user names to the **Available User Groups** list.

Note: When a User Group is the only group with rights to the template and then has **Word Document Composition** and **Document Composition Administration** privileges removed, that User Group's rights to the template can not be removed within the **Template Security** dialog box. In order to edit the template's security, the User Group with rights to the template must have **Document Composition Administration** privileges. If this is not an option, please contact your first line of support.

8. Select a User Group from the **Selected User Groups** list to display and configure template rights for that User Group. The following options are available:

Security	Description
Compose Documents from this Template	Allows the User Group to create a document from a configured template.
Manually Edit the Document Preview	Allows the User Group to edit the composed document during preview prior to importing it into OnBase. If this right is not given to the User Group, users are not be able to edit the previewed document prior to import into OnBase.
Modify this Template	Allows the User Group to modify **Template Options**. **Note:** There must be at least one User Group configured with this template right.

9. Click **Save** to save the template.

Caution: Templates that are deleted from the **SYS - Document Template** Document Type are still available for selection in the Template Builder. For this reason, templates should be deleted using the Template Builder. See Deleting Templates on page 121 for more information.

Your User Group(s) is automatically assigned **Compose Documents from this Template** and **Modify this Template** rights to the template you created.

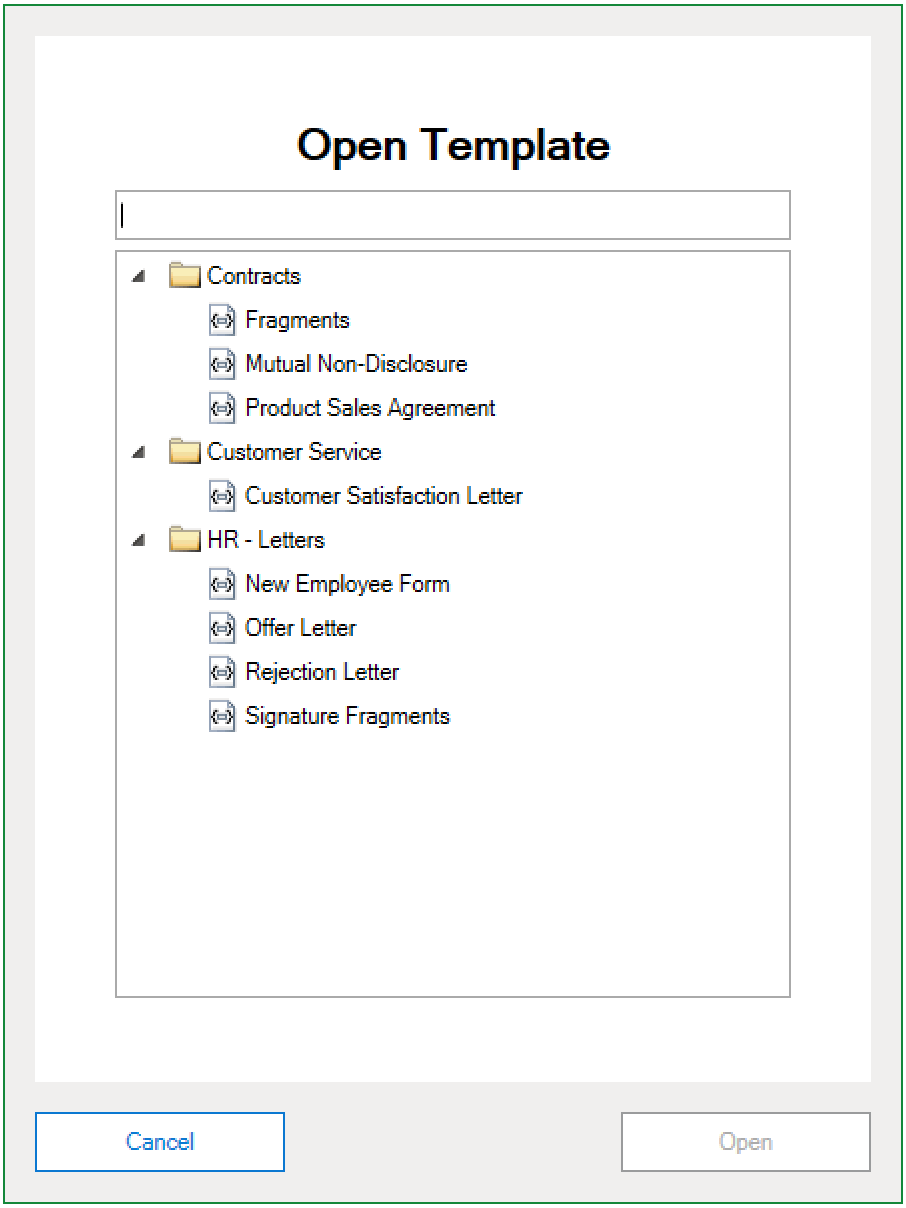
Viewing and Editing Templates

Depending on your rights, you can view and edit existing templates.

To view and edit a template:

1. Click **Open Template**.

   The **Open Template** dialog box is displayed. By default, each template group is expanded to display its associated templates:



2. To filter the list, type the name of the desired template or the template group the desired template is associated with. The list is filtered as you type.

Tip: You can type any part of the template or template group name to yield results. For example, if you are searching for **HR - Offer Letter**, you can type **letter** to display any template or template group names containing **letter**.

   Click the triangles to the left of template groups to collapse or expand template groups as needed.
3. Select the desired template.
4. Click **Open**.
   The template is opened and displayed.
5. Edit the document as desired.
6. Click **Save Template** to save your changes.

Saving a Template Locked by Another User

A document lock is placed on a template when a user opens it, so only that user can edit the template. You cannot save changes to a template locked by another user. When attempting to save changes to a locked template, you are notified the template is locked and prompted to create a new a template instead.

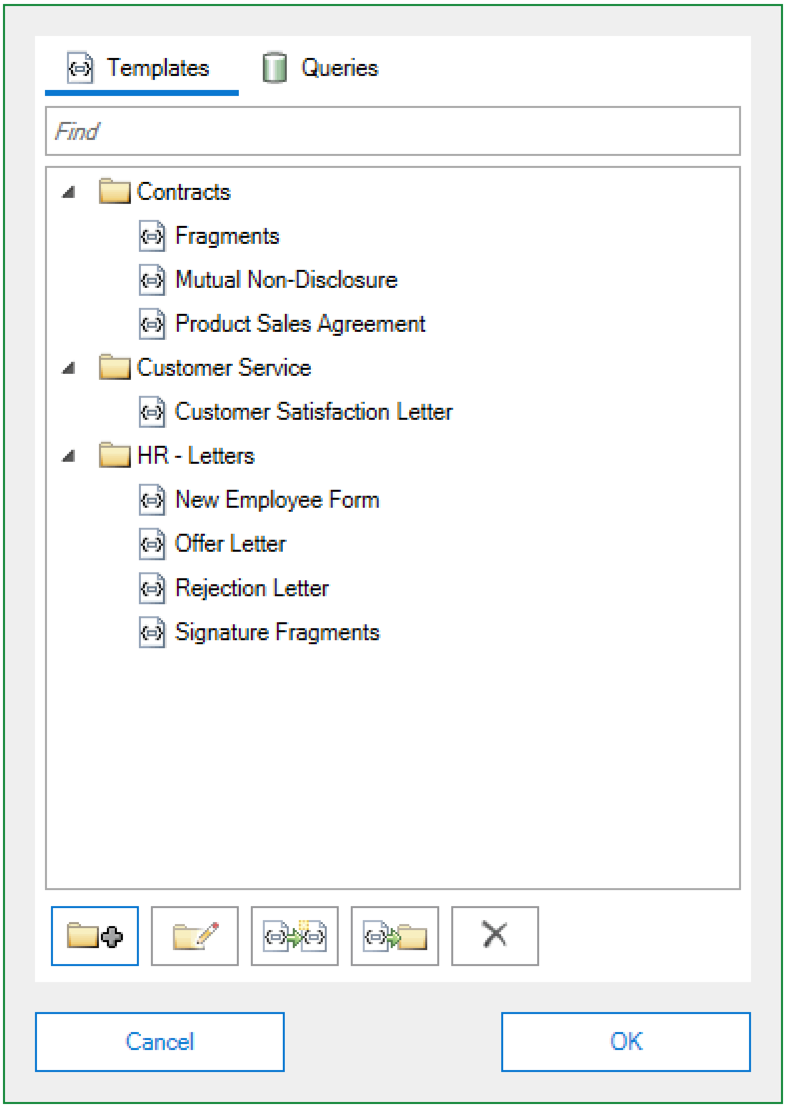
To save your changes to the template, either the other user must close the template, or the document lock must be removed from within OnBase.

Copying Templates

Once a template has been created, the template can be copied. This can save time when configuring many similar templates.

To copy a configured template:

1. Click **Control Panel**.
   The control panel is displayed:



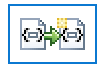
2. On the **Templates** tab, select a template.
3. To filter the list, type the name of the desired template or template group the template belongs to. The list is filtered as you type.

Tip: You can type any part of the template or template group name to yield results. For example, if you are searching for **HR - Offer Letter**, you can type **letter** to display any template or template group names containing **letter**.

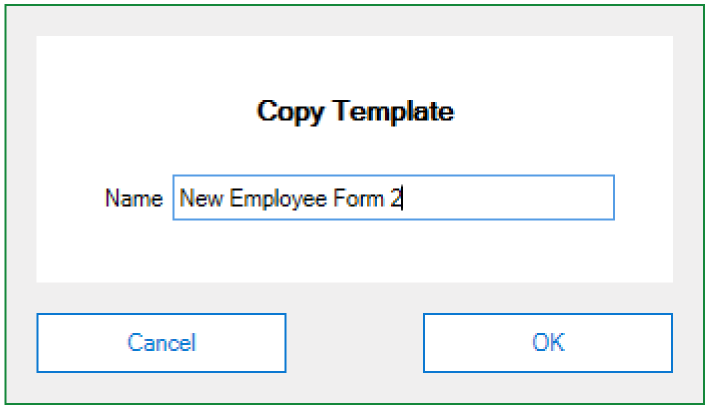
   Click the triangles to the left of template groups to collapse or expand template groups as needed.

4. Select a template.

5. Click **Copy Template**:



The **Copy Template** dialog box is displayed:



6. The name of the template you are copying is displayed in the **Name** field.
7. Edit the **Name** field to be the new name for the copied template.
8. Click **OK**.

   The duplicate template is created and saved to the same template group.

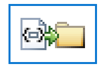
Moving Templates

Templates can be moved between template groups.

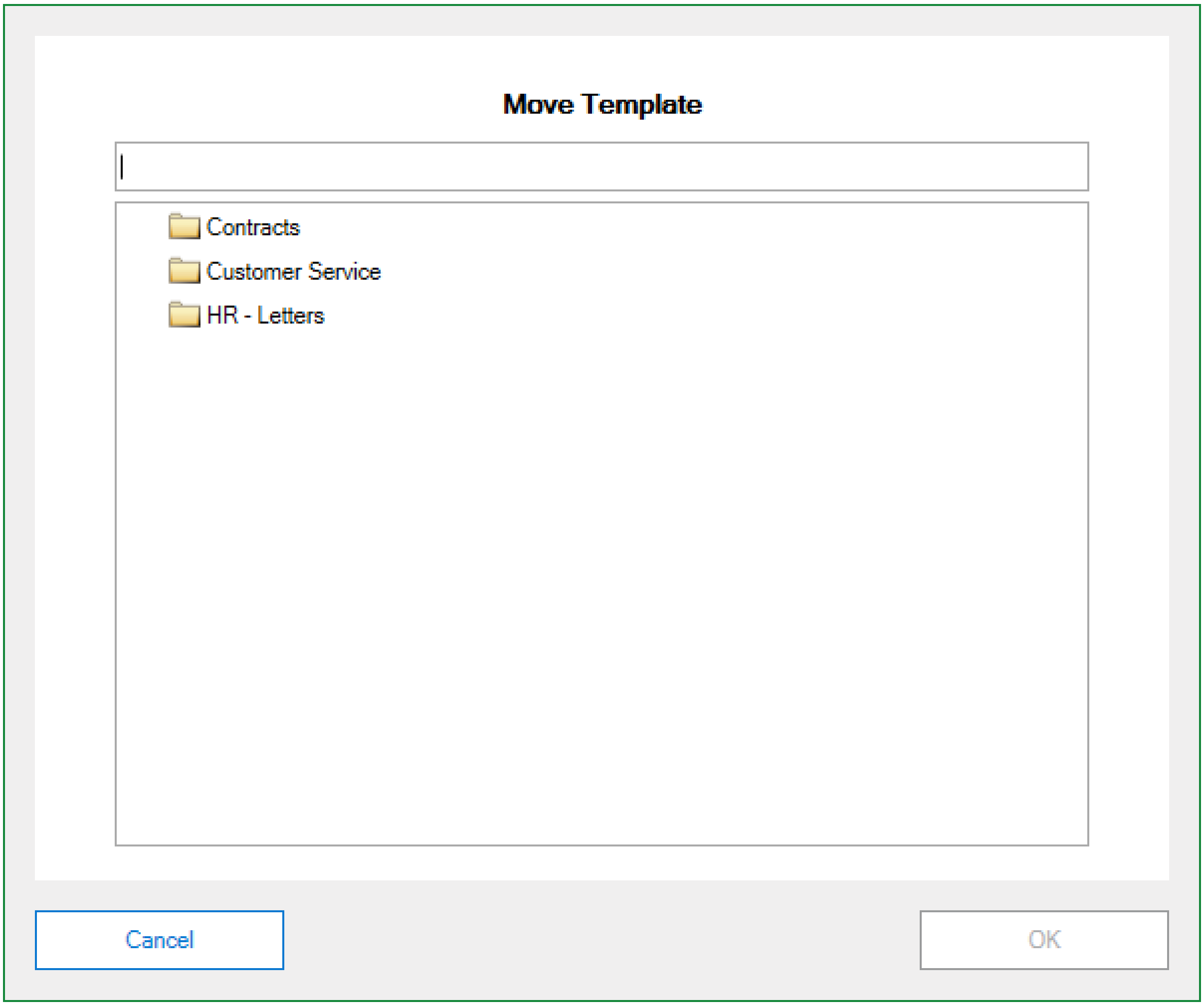
To move a template:

1. Click **Control Panel**.
2. On the **Templates** tab, expand a template group.
3. Select a template.

4. Click **Move Template**:



The **Move Template** dialog box is displayed:



5. To filter the list, type the name of the desired template group. The list is filtered as you type.

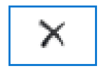
Tip: You can type any part of the template group name to yield results. For example, if you are searching for **HR - Letters**, you can type **letter** to display any template group names containing **letter**.

6. Select the template group that the template should be moved to.
7. Click **OK** to move the template or click **Cancel** to keep the template in its original template group.

Deleting Templates

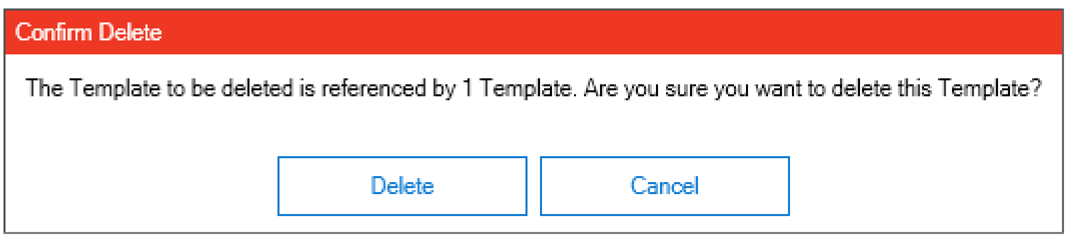
To delete a template:

1. Click **Control Panel**.
2. On the **Templates** tab, expand a template group.
3. Select a template.
4. Click **Delete**:



You are prompted to confirm whether you want to delete the template.

If the template is being referenced by another template (e.g., in a Document Fragment Placeholder), the number of affected templates is displayed:



5. Click **Delete** to delete the template or click **Cancel** to keep the template.

Exporting and Importing

Depending on your rights, you can export and import existing Document Composition configuration items directly from the Template Builder.

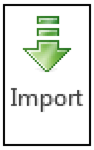
Note: Only packages exported using the Template Builder can be imported using the Template Builder.

To access the **Export** dialog box, click **Export**:

The following types of configuration items can be exported from a database:

- Document Composition ODBC Inputs
- Document Composition Templates

To access the **Import** dialog box, click **Import**:



When importing an export package, additional associated configuration items may require decisioning.

For more information on using the **Export** and **Import** dialog boxes, see the **System Administration** module reference guide.

For information on exporting and importing Document Composition configuration items using the OnBase Configuration module, see Configuration on page 263.

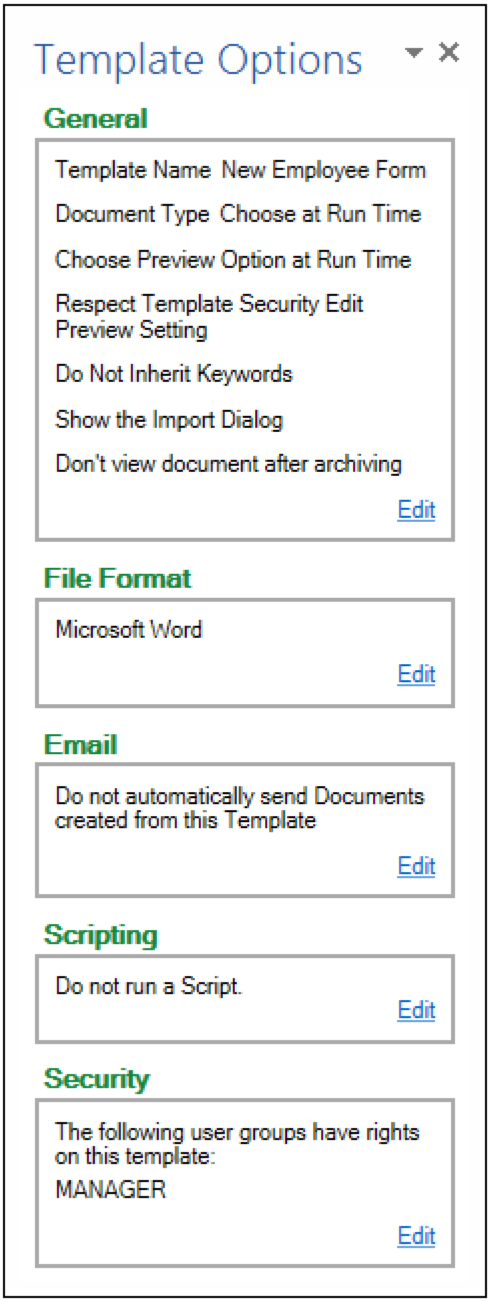
For information on exporting and importing Document Composition configuration items using OnBase Studio, see Studio on page 263.

Configuring Template Options

Once a template is created, there are additional options in the **Template Options** pane to configure. These settings are enforced when a document is created using the template.

To configure template options:

1. Click **Template Options**.
2. The **Template Options** pane is displayed:

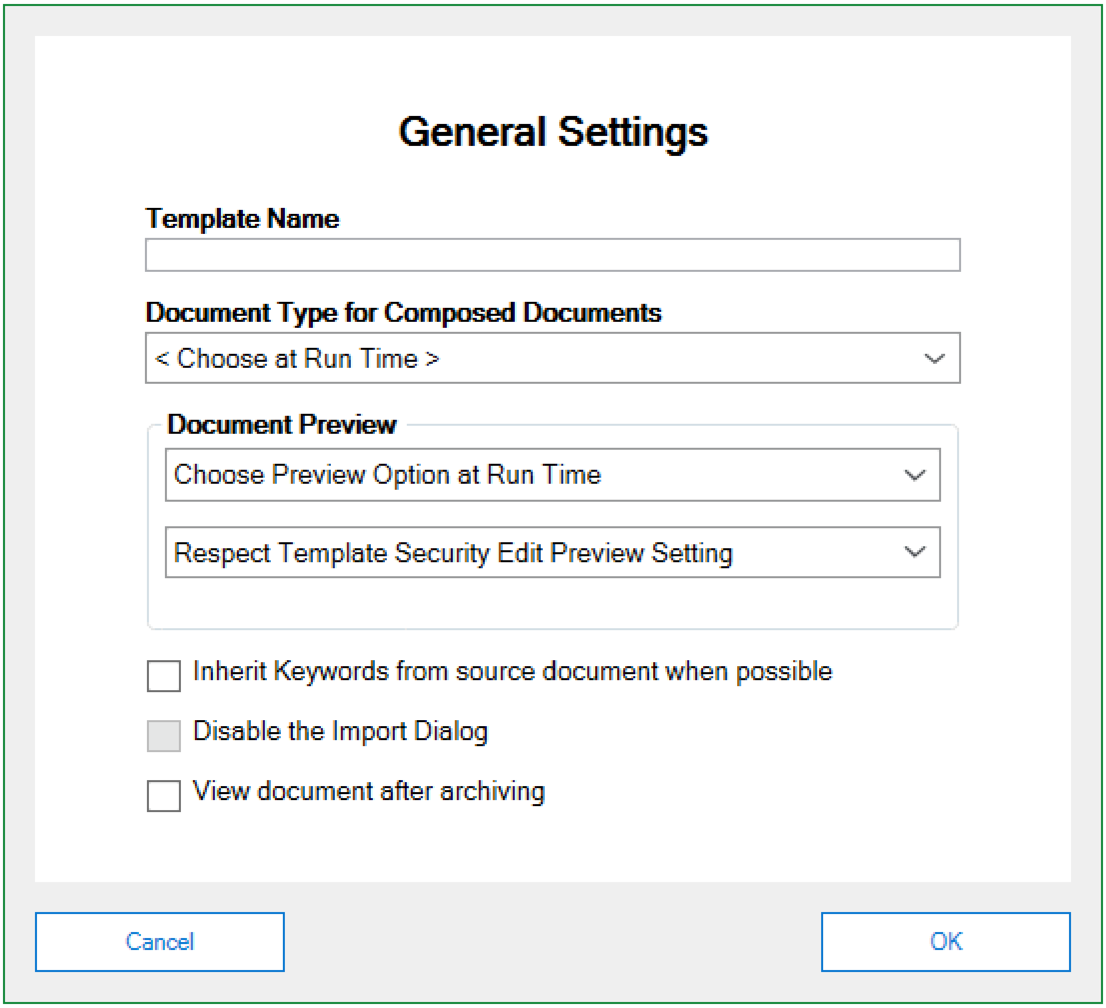


3. Select the **edit** hyperlink in one of the following areas of the **Template Options** pane:

Area	Description
General	Click to edit general template settings. See General Settings on page 125 for more information.
File Format	Click to edit file format settings. See File Format Settings on page 127 for more information.
Email	Click to edit e-mail settings. See Email Settings on page 129 for more information.
Scripting	Click to edit scripting settings. See Scripting Settings on page 131 for more information.
Security	Click to edit security settings. See Security Settings on page 132 for more information.

4. After you have finished configuring template options, click **Save Template** to save the configured **Template Options**.

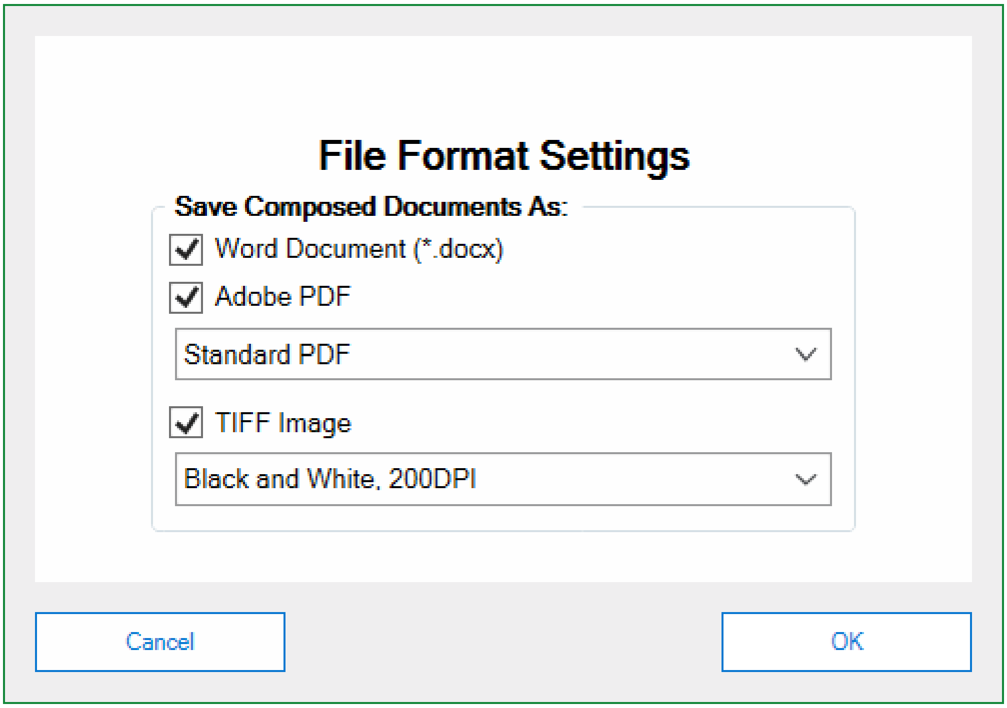
General Settings



General Settings	Description
Template Name	Displays the name of the template. Modify the template name if necessary.
Document Type for Composed Documents	Select a Document Type from the drop-down list to enforce a default Document Type into which the composed document will be imported. Select **<Choose at Run Time>** to allow users to select the Document Type during document composition.

General Settings	Description
Document Preview	Select Preview options for composed documents from the drop-down lists: Select **Choose Preview Option at Run Time** to give users the option to preview documents before archiving in OnBase. Select **Always show Preview before archiving** to force document previewing before archiving in OnBase. Select **Respect Template Security Edit Preview Setting** to respect User Group template security settings. Select **Restrict Edit Preview Setting to Select Placeholder Values** and click **Select Editable Placeholders** to specify placeholders that are editable. With this setting selected, the **Edit During Preview** dialog box is displayed during Placeholder configuration.
Placeholder Settings	Click the **Select Required Placeholders** hyperlink to set the required Placeholders for the template. Required Placeholders must be populated in order for composition to complete. After clicking **Select Required Placeholders**, the **Select Required Placeholders** dialog box is displayed. Select the appropriate Placeholder and use the arrow buttons to move Placeholder to either the **Required** column or the **Not Required** column. Then, click **Finish**.
Inherit Keywords from Source Document when possible	Select to inherit Keyword Values from the source document.
Disable the Import Dialog	This option is enabled when **Inherit Keywords from Source Document when possible** and a **Document Type for Composed Documents** are selected. This option disables the **Import** pane and automatically stores the template into the Document Type specified in the **Document Type for Composed Documents** drop-down list. **Caution:** Currency and Specific Currency Keyword Types are not inherited when the **Import** dialog box is disabled. This is a known limitation.
View document after archiving	Select to view composed documents after archiving in OnBase. **Note:** This option will select and disable **View Document After Archiving** on the **Select Template Option** dialog box when composing a document.

File Format Settings



You can select one or multiple **File Format Settings**:

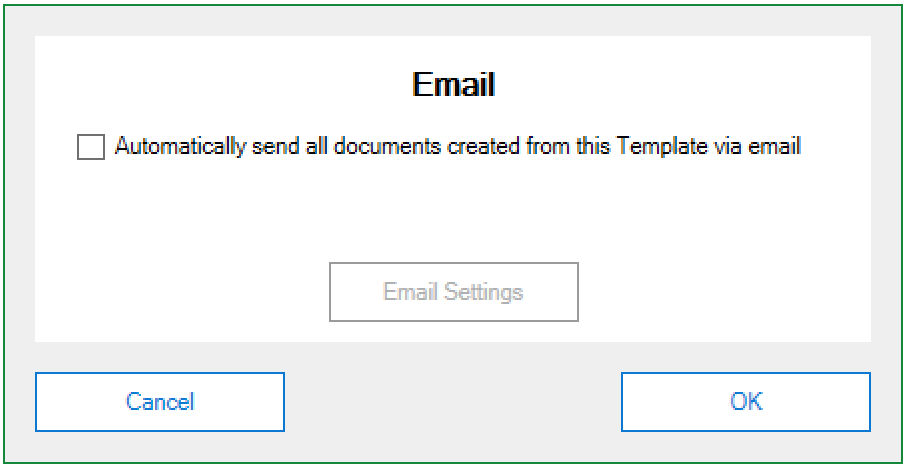
File Format Settings	Description
Word Document (*.docx)	Select to save the composed document as a Word document (.docx).
Adobe PDF	Select to save the composed document as an Adobe PDF. When selected, a drop-down list is displayed. Select **Standard PDF** to save the composed document as a standard PDF file. Select **PDF/A-1A** to save the composed document as a PDF/A-1A file. Select **PDF/A-1B** to save the composed document as a PDF/A-1B file.

File Format Settings	Description
TIFF Image	Select to save the composed document as a TIFF image. When selected, a drop-down list is displayed. Select one of the following image quality settings from the drop-down list: • **Black and White, 100 DPI** - Select to save the composed document as a black and white (CCITT4 compression) 100 DPI TIFF. • **Black and White, 200 DPI** - Select to save the composed document as a black and white (CCITT4 compression) 200 DPI TIFF. • **Black and White, 300 DPI** - Select to save the composed document as a black and white (CCITT4 compression) 300 DPI TIFF. **Note:** When saving as black and white, ensure composed documents save as expected. Colors in these documents are converted to either black or white depending on how dark or light they are. For example, if a Placeholder value is formatted to be yellow, the value may be converted to white, thereby appearing as blank on the composed document. • **Greyscale, 100 DPI** - Select to save the composed document as a greyscale 100 DPI TIFF. • **Greyscale, 200 DPI** - Select to save the composed document as a greyscale 200 DPI TIFF. • **Greyscale, 300 DPI** - Select to save the composed document as a greyscale 300 DPI TIFF. • **Color, 100 DPI** - Select to save the composed document as a color (LZW compression) 100 DPI TIFF. • **Color, 200 DPI** - Select to save the composed document as a color (LZW compression) 200 DPI TIFF. • **Color, 300 DPI** - Select to save the composed document as a color (LZW compression) 300 DPI TIFF.

When composing a document using a template configured to use multiple file formats:

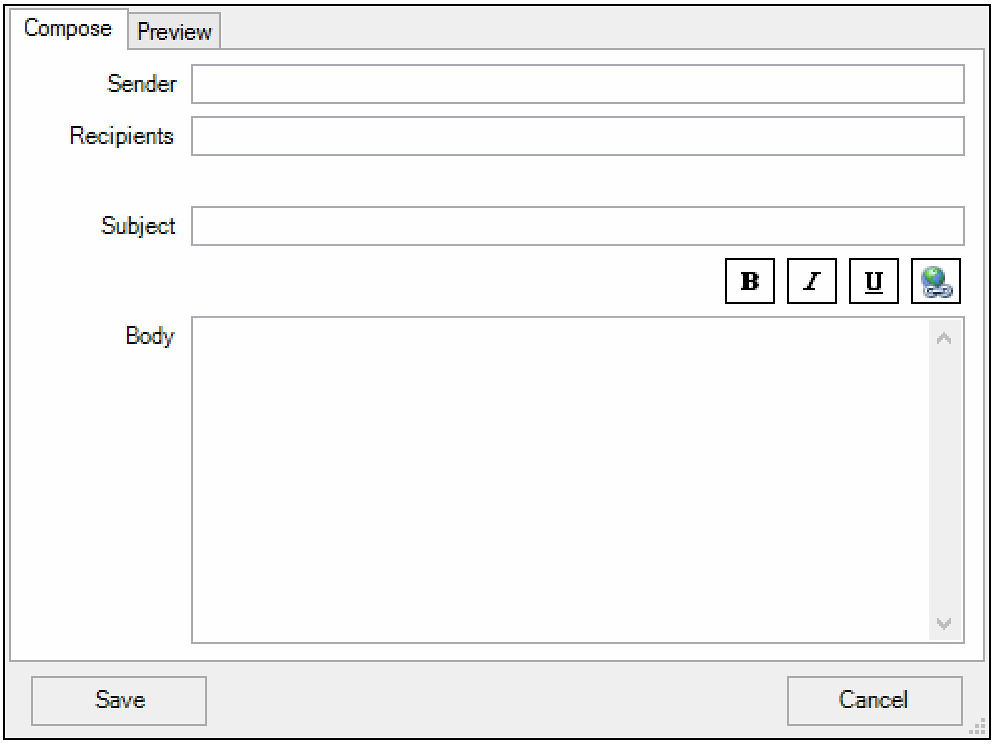
- The document must be stored in a Document Type configured to allow multiple renditions. For information on configuring renditions, see the System Administration documentation.
- Documents are stored to OnBase in the following order:
  - .docx
  - PDF
  - TIFF
- If the user previews and edits the template in Word, any modifications are included in the PDF or TIFF.

Email Settings



Email Settings	Description
Automatically send all documents created from this Template via email	Select to send an email notification via the Hyland Distribution Service when a document is generated with this template. This notification is sent after the document is archived in OnBase. Selecting this option enables the **Email Settings** button.

Click **Email Settings** to configure the email message in the **Email Options** dialog box:

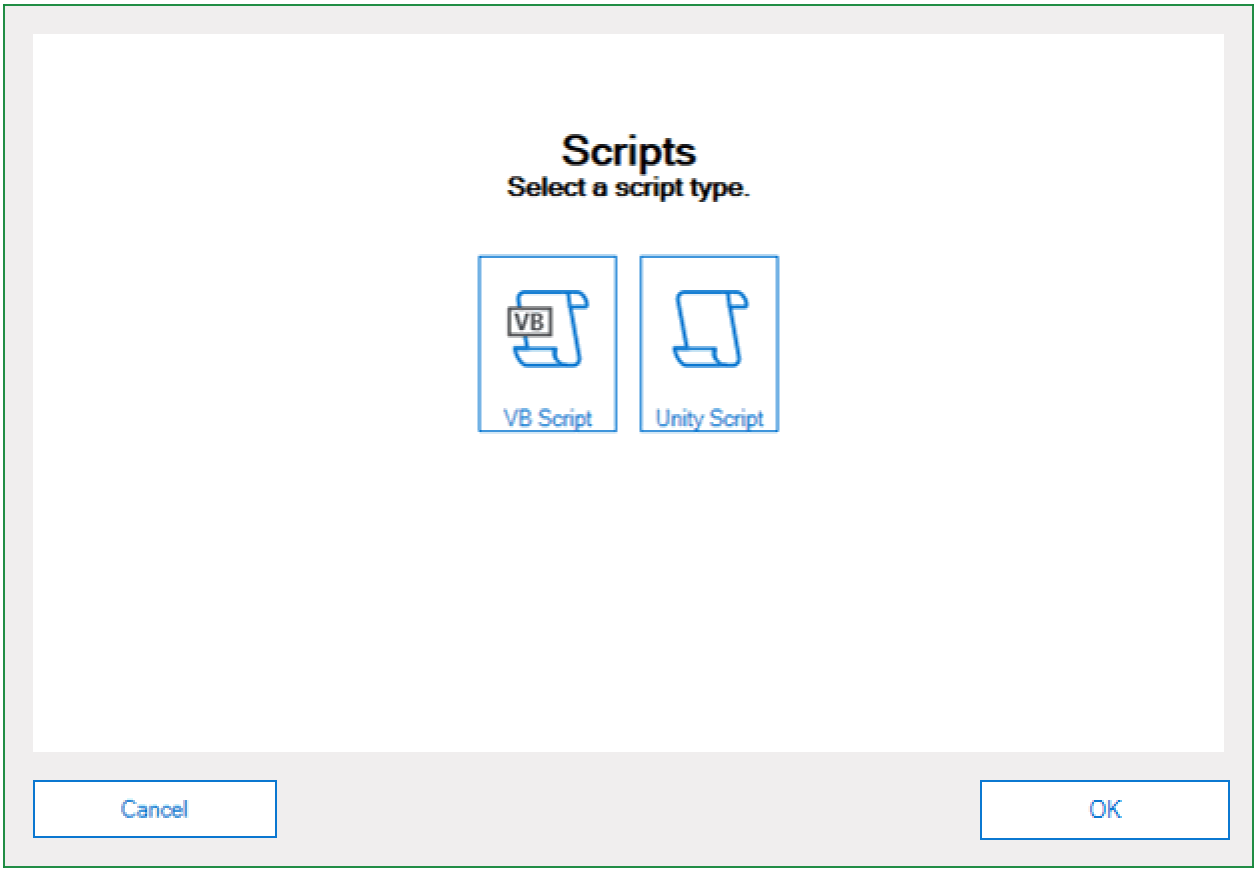


Option	Description
Sender	Type the email address of the sender.
Recipients	Type the email address of the recipient. Separate multiple recipients with semi-colons.
Subject	Type the subject of the email.
Body	Type the body text of the email. To apply formatting, select the text and click the **Bold**, **Italic**, or **Underline** buttons. HTML tags signify that formatting has been applied. For example, Sincerely appears as **Sincerely** in the email message that will be sent. To add a hyperlink to the email, click the **Insert Hyperlink** button. In the **Insert Hyperlink** dialog box, type the text that should appear in the email message body in the **Text** field. Type the URL of the hyperlink in the **URL** field. Click **OK** to add the hyperlink to the email message.

Select the **Preview** tab to preview what your email notification will look like.

Click **Save** to save the email notification.

Scripting Settings



Select one of the following:

- VB Script
- Unity Script

If you clicked the **VB Script** button, select the desired VB Script from the **Select VB Script to run** drop-down list.

Note: You are notified when a selected VB Script may be referencing the DMCoreX API. The DMCoreX API has been deprecated. Therefore, VBScripts using this API no longer run during document composition. This does not affect whether a document is successfully composed. Contact your first line of support for more information.

For more information on creating VB Scripts, see the **System Administration** documentation.

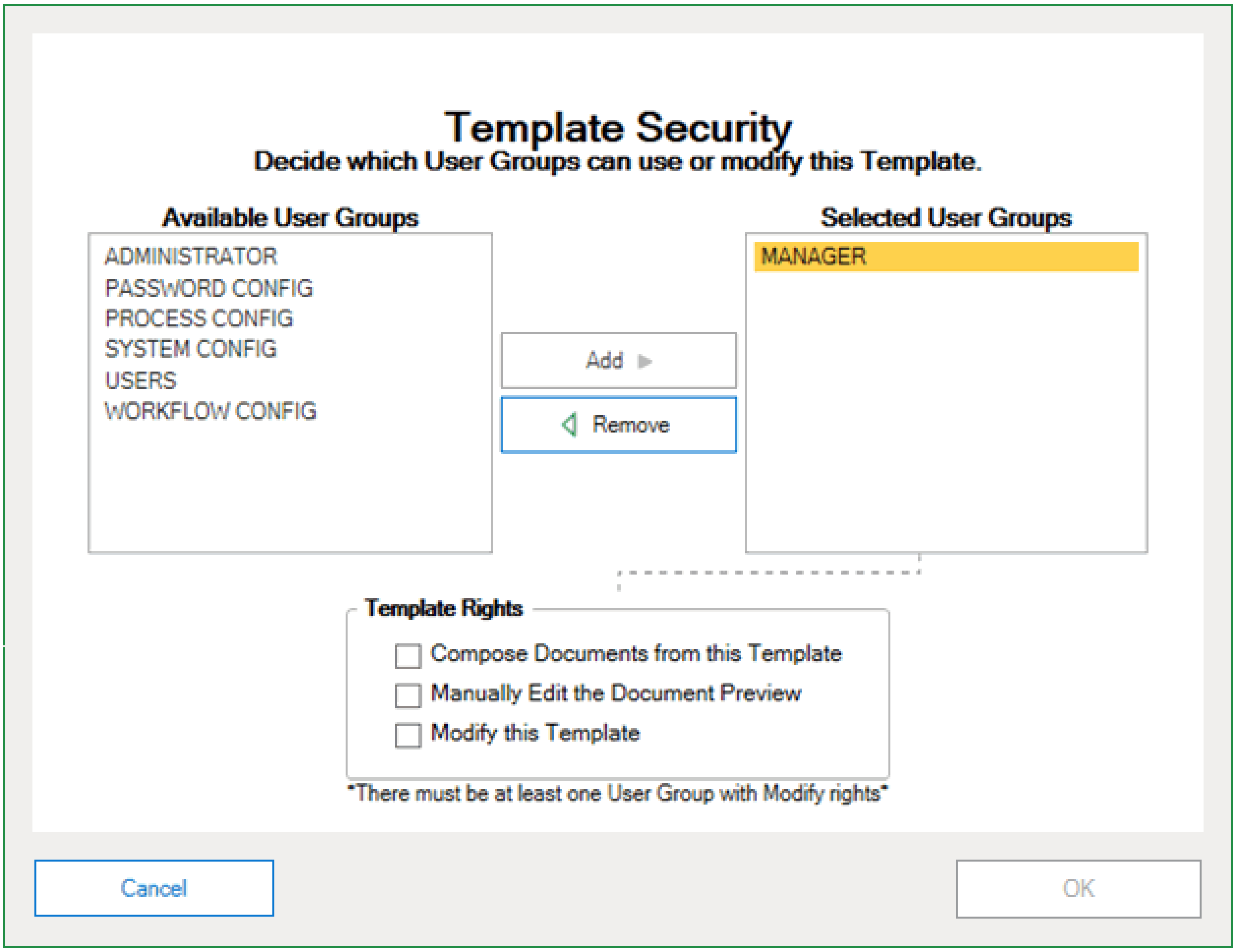
Note: VB Scripts are not supported using a 64-bit Application Server.

If you clicked the **Unity Script** button, select the desired Unity Script from the **Select Unity Script to run** drop-down list.

Note: For more information creating Unity Scripts, contact your first line of support.

When **<Do not run a Script on this Template>** is selected, no scripts will run.

Security Settings



Select User Group names in the **Available User Groups** list and click **Add** to add them to the **Selected User Groups** list on the right.

Note: Only User Groups with Document Composition Administration or Word Document Composition privileges are listed in the **Available User Groups** list.

Remove User Group names from the **Selected User Groups** list by clicking **Remove** to move the user names to the **Available User Groups** list.

When each **Selected User Group** is selected, the following **Template Rights** are available:

Security	Description
Compose Documents from this Template	Allows the User Group to create a document from a configured template.
Manually Edit the Document Preview	Allows the User Group to edit the composed document during preview prior to importing it into OnBase. If this right is not given to the User Group, users are not be able to edit the previewed document prior to import into OnBase.
Modify this Template	Allows the User Group to modify **Template Options**. **Note:** There must be at least one User Group configured with this template right.

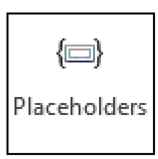
Placeholders

Placeholders pull values from OnBase into the document template. Placeholders can be placed in the body of a Microsoft Word document. Placeholders can also be placed in other areas, such as headers and footers.

Creating Placeholders

To create Placeholders:

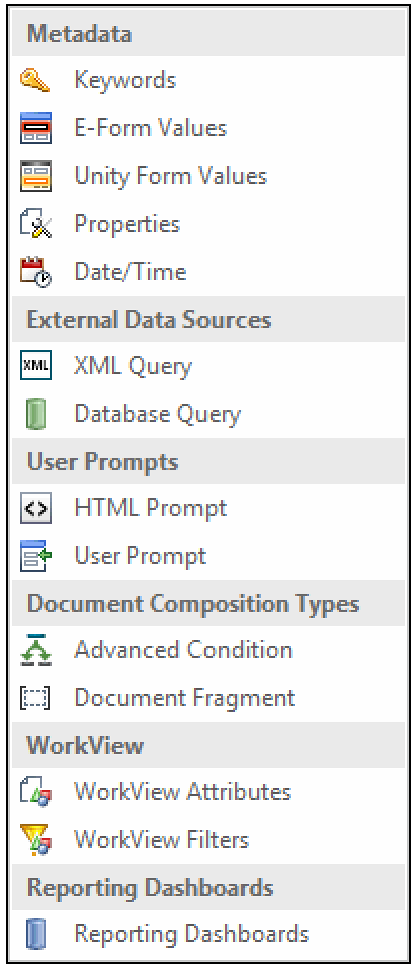
1. In the **Placeholders** group on the **Template Builder** ribbon, perform one of the following:
   - Click **Create New**, and log in to OnBase, if prompted.
   - Click **Placeholders**, and log in to OnBase, if prompted:

   The **Placeholder** pane is displayed. Click **Create New**:

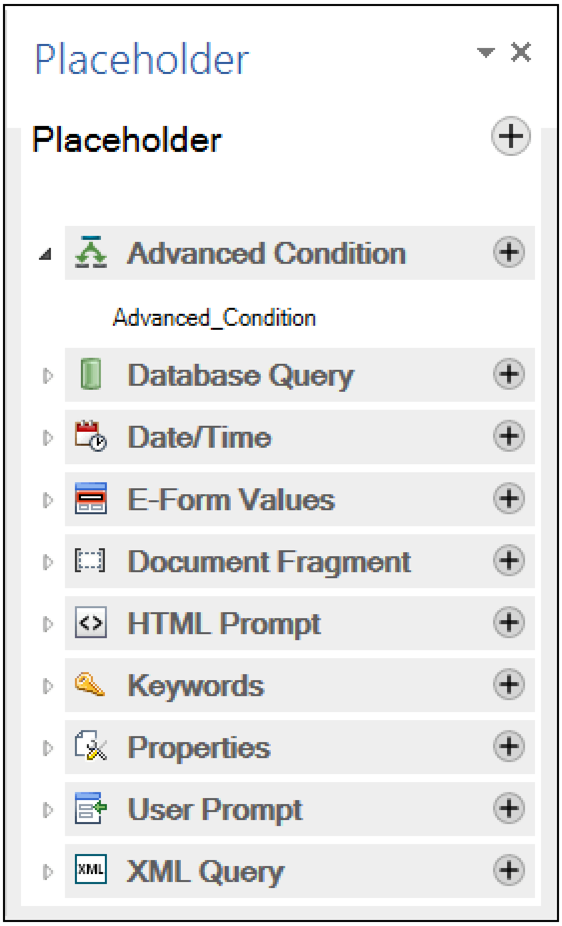
2. The **Create New** drop-down list is displayed:



3. Select and configure a placeholder type from the **Create New** drop-down list. For placeholder type configuration, see the following:
    - Configuring Advanced Condition Placeholders on page 135
    - Configuring Database Query Placeholders on page 150
    - Configuring Date/Time Placeholders on page 157
    - Configuring E-Form Value Placeholders on page 158
    - Configuring Document Fragment Placeholders on page 159
    - Configuring HTML Prompt Placeholders on page 161
    - Configuring Keywords Placeholders on page 163
    - Configuring Properties Placeholders on page 165
    - Configuring Reporting Dashboards Placeholders on page 167
    - Configuring Unity Forms Placeholders on page 171
    - Configuring User Prompt Placeholders on page 173
    - Configuring WorkView Attributes Placeholders on page 174
    - Configuring WorkView Filter Placeholders on page 177

- Configuring XML Query Placeholders on page 180

4. The **Placeholder** pane is displayed and lists all created placeholders, organized by placeholder type. Click the arrow to expand or collapse placeholder types.



Note: Only placeholder types with existing placeholders are listed in the **Placeholder** pane.

To directly create additional Placeholders of a specific type, click **Create New** next to the Placeholder type:

For additional placeholder configuration options, see Editing Placeholders on page 193.

Configuring Advanced Condition Placeholders

An Advanced Condition Placeholder is a conditional equation that contains one or more if/then/else statements (conditions). Together, the conditions yield one value, which becomes the value for the Advanced Condition Placeholder.

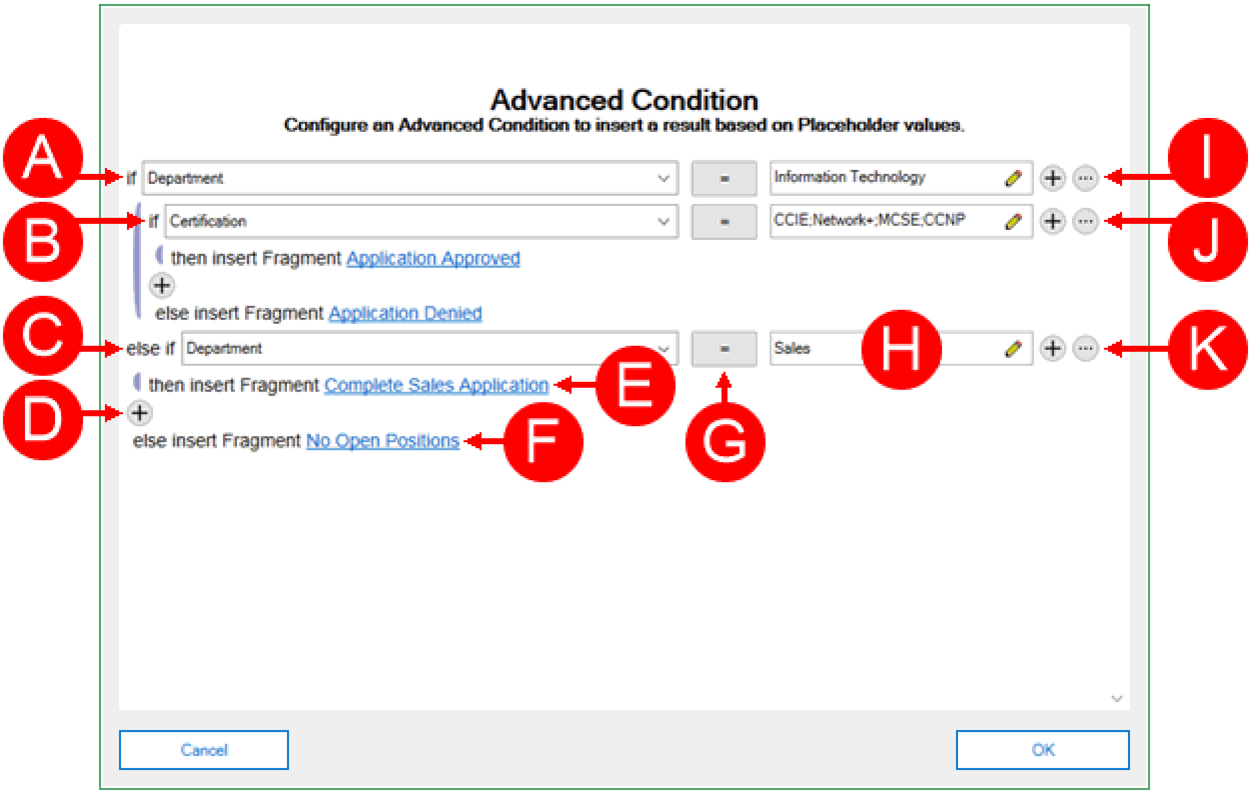
Conditions follow this basic formula: When a statement is true, then a value is inserted into the template. When a statement is false, a different value is inserted into the template. The main difference between a standard Document Composition condition and an advanced condition is that an advanced condition allows for multiple conditions.

Before you begin, understand the following concepts in the **Advanced Conditions** dialog box:

- Each **if** and **else if** row by itself denotes the start of a new condition and is referred to as either a conditional statement or an **if** statement. Whether the **if** statement is true or false during template creation determines how the Advanced Condition Placeholder gets its value.
- Each **then insert** and **else insert** row is a possible value for the Advanced Condition Placeholder. A **then insert** value indicates the solution if the related **if** statements are true. An **else insert** value indicates the solution if one or more of the related **if** statements are false.
- Each bracketed group of rows makes up a condition. Together, all rows make up the advanced condition.

To create an Advanced Condition Placeholder:

1. From the **Create New** drop-down list, select **Advanced Condition**.
2. The **Advanced Condition** dialog box is displayed. Each component is described below. For additional information about these components, see the subsequent sections.



Component	Description
A	An **if** statement denotes the start of a new condition. Select a source Placeholder from the **Select Source Placeholder** drop-down list. In this example, this statement also represents a parent condition, since it contains a child condition.
B	Denotes the start of a child condition. Select a source Placeholder from the **Select Source Placeholder** drop-down list.
C	Denotes the start of a sibling condition. Select a source Placeholder from the **Select Source Placeholder** drop-down list.
D	**Add a sibling condition** button—Click to add a sibling condition to another condition. Sibling conditions are on the same level. A sibling condition is only evaluated if a sibling condition before it is false.

Component	Description
E	A **then insert** statement is the value for the Advanced Condition Placeholder if the preceding condition is evaluated as true. Click the hyperlink to select how the value is determined. Options include **Nothing**, **Text**, **Placeholder**, and **Fragment**. **Note:** Inserting a fragment into itself or any dependent fragments is not supported. For example, fragment "HR - Offer" cannot be inserted into fragment "HR - Offer". Additionally, fragment "HR - Offer" cannot be inserted into fragment "Application Approved" if fragment "Application Approved" is inserted into fragment "HR - Offer".
F	An **else insert** statement is the value for the Advanced Condition Placeholder if the preceding condition is evaluated as false. Click the hyperlink to select how the value is determined. Options include **Nothing**, **Text**, **Placeholder**, and **Fragment**. **Note:** Inserting a fragment into itself or any dependent fragments is not supported. For example, fragment "HR - Offer" cannot be inserted into fragment "HR - Offer". Additionally, fragment "HR - Offer" cannot be inserted into fragment "Application Approved" if fragment "Application Approved" is inserted into fragment "HR - Offer".
G	**Select operator** button—Click to change the operator used in the conditional statement. The operator determines how entered Placeholder values are compared against the Placeholder values used in template creation.
H	Enter the value to compare against the Placeholder value used in template creation. If a multiple-value operator is selected, multiple values can be entered by either using the **Edit** button or by separating values with a semicolon (;).
I	**Row options** button—Click to access options for the row. Options include **Delete**, **Move Up**, and **Move Down**.
J	**Add a child condition** button—Click to add a child condition to the corresponding condition. Child conditions are indented one level.
K	**Edit** button—Click to enter more than one value for the source Placeholder. This option is only available when a multiple-value operator is selected.

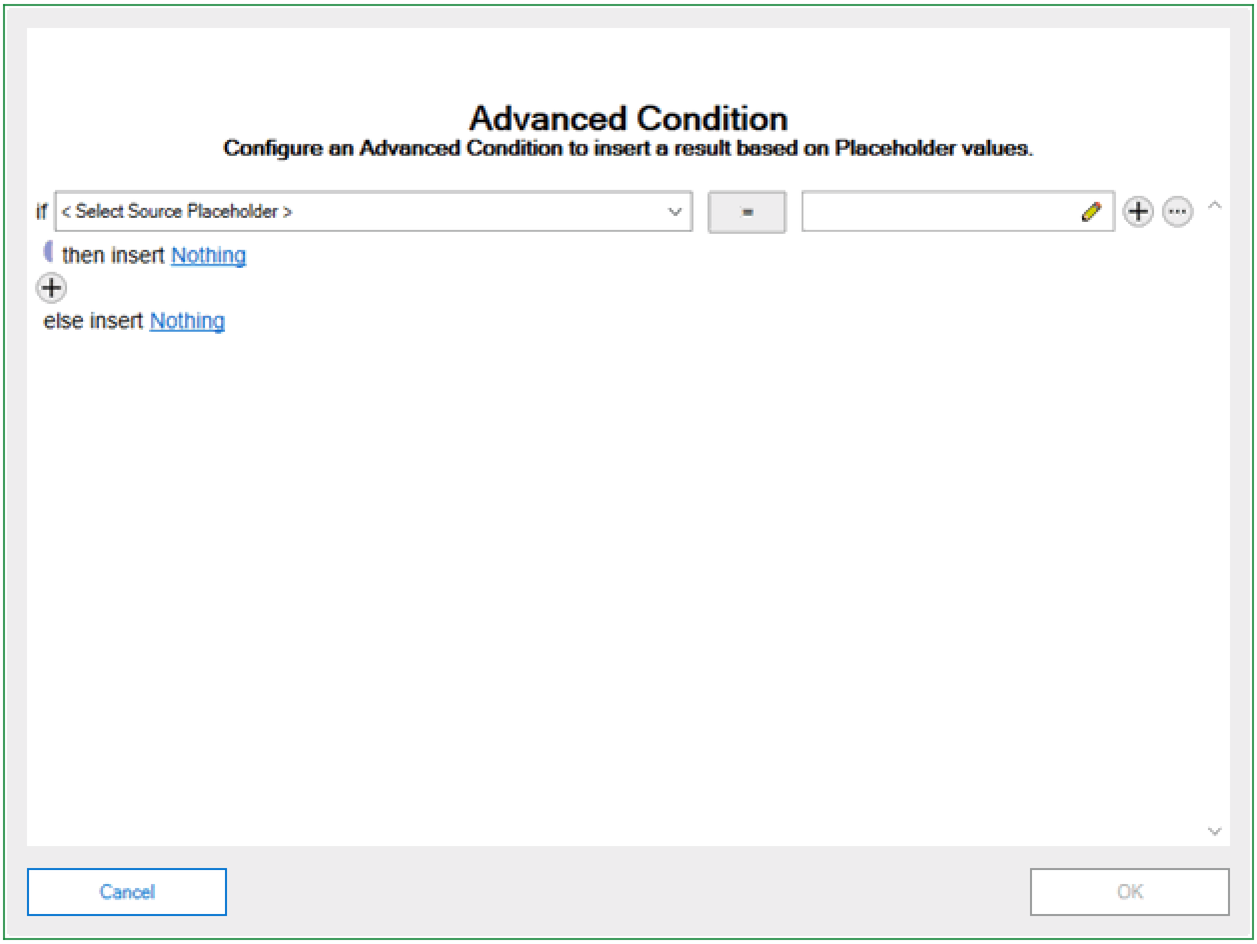
Configuring an If Statement

If statements, also referred to as conditional statements, are the building blocks for an Advanced Condition Placeholder and determine the value for the Advanced Condition Placeholder.

An **if** statement says that if an entered Placeholder value meets a condition, the statement is true and either reaches a value or moves to the next child **if** statement (if applicable). If none of the entered Placeholder values meets the condition, the statement is false and proceeds to either a different solution or the next sibling condition.

To configure an **if** statement for an Advanced Condition Placeholder:

1. From the **Advanced Condition** dialog box, click the **Select Source Placeholder** drop-down list:

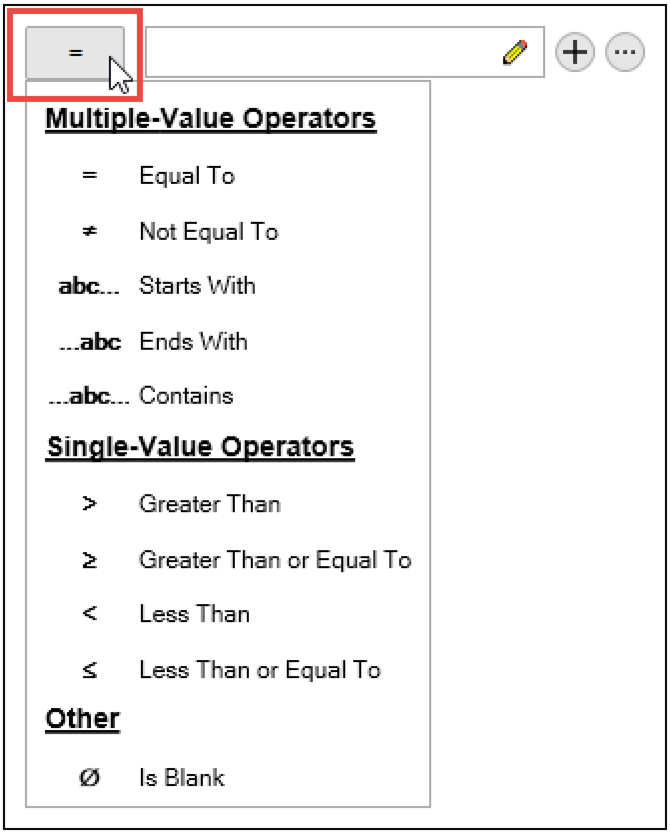


2. Do one of the following:
   - Select an existing Placeholder to compare a value against.
   - Select **<Create New Placeholder>** to create a new Placeholder to compare a value against. For more information on creating Placeholders, see Creating Placeholders on page 133.

     The newly created Placeholder is automatically selected.

Note: Certain Placeholders cannot be selected as a source Placeholder. While creatable from the **<Select Source Placeholder>** drop-down list, only Placeholders that return a single plain-text value are available to select as a source Placeholder.

3. Click the operator button to display available operators. Operators determine how the source Placeholder will be compared with values entered later in the process.



4. Select the appropriate operator for the **if** statement. Operators are distinguished as either **Multiple-Value Operator** or **Single-Value Operator**.

   A single-value operator allows you to enter only one comparison value. A multiple-value operator allows you to enter more than one comparison value.

Multiple-Value Operator	Description
Equal To	The actual value for the source Placeholder must be equal to any one of the entered values for the statement to be true. **Note:** The **Equal To** operator is selected by default for each newly created **if** statement.
Not Equal To	The actual value for the source Placeholder must not be equal to any one of the entered values for the statement to be true.
Starts With	The actual value for the source Placeholder must begin with the following characters for the statement to be true.
Ends With	The actual value for the source Placeholder must end with the following characters for the statement to be true.
Contains	The actual value for the source Placeholder must contain the following characters sequentially for the statement to be true.

Single-Value Operator	Description
Greater Than	The actual value for the source Placeholder must be greater than the entered value for the statement to be true.
Greater Than or Equal To	The actual value for the source Placeholder must be greater than or equal to the entered value for the statement to be true.
Less Than	The actual value for the source Placeholder must be less than the entered value for the statement to be true.
Less Than or Equal To	The actual value for the source Placeholder must be less than or equal to the entered value for the statement to be true.

Note: Only numeric values can be used with single-value operators. The following are examples of acceptable values: 77, 77.3, -77, (77), and 1,977.

Select **Is Blank** if the value for the Placeholder must be null for the variable to be true.

5. Do one of the following:
    - If a single-value operator is selected, enter a comparison value into the field.

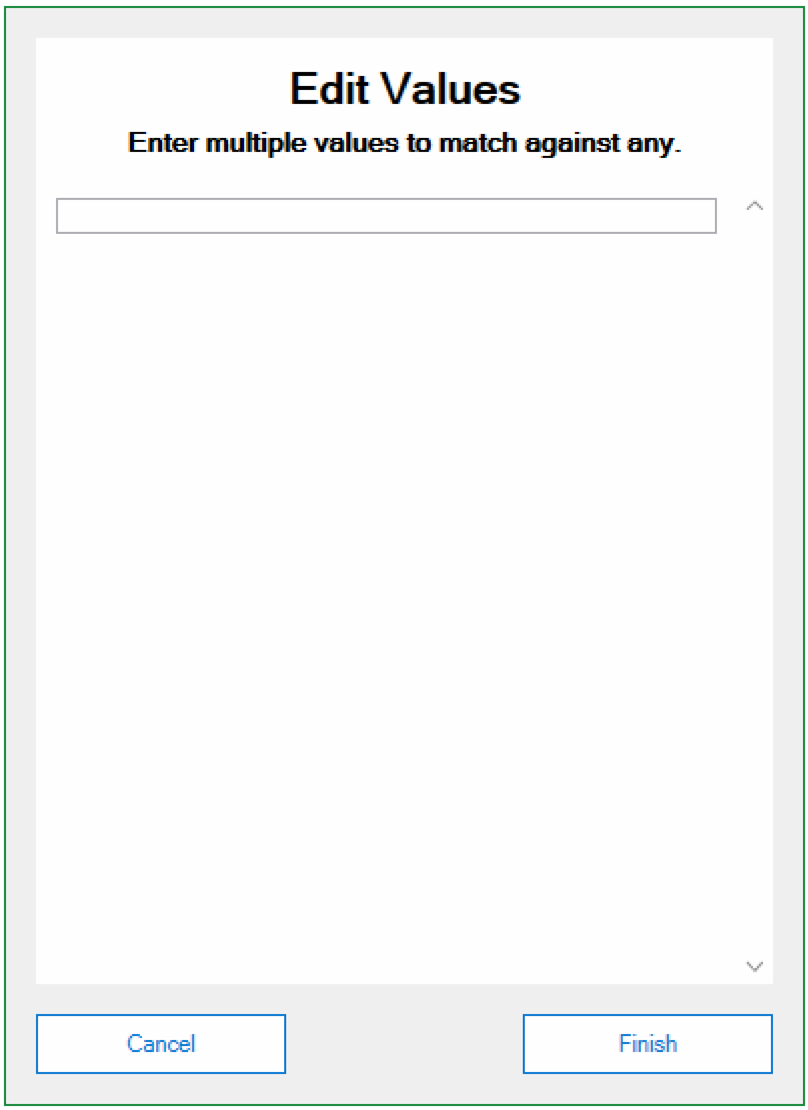
Note: You can not enter a semicolon (;) as part of the value for a single-value operator.

- If a multiple-value operator is selected, enter one or more comparison values into the field, each separated with a semicolon (;). For example, a field with values **33**, **44**, and **55** should read **33;44;55**.

Note: A maximum of 127 characters can be entered in the field.

You can also click the **Edit** button in the field to enter more than one comparison value:

The **Edit Values** dialog box is displayed:



Enter one value per field. As you begin typing in one field, a new field is created. Click **OK** to save the entered values.

6. The **if** statement is configured. For information on creating additional **if** statements

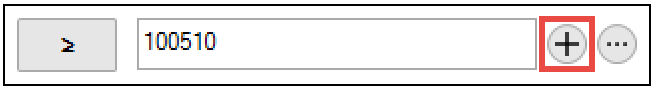
(i.e., child and sibling conditions), see Creating New Conditions on page 144.

Creating New Conditions

Each **if** statement signifies the start of a new condition. A condition can be created as either a sibling or a child to another condition. A sibling condition is only evaluated if the previous sibling condition is false. A child condition is only evaluated if the parent condition is true.

Creating a Child Condition

To create a child to an existing condition, from the **Advanced Condition** dialog box, click the **Add** button located in the same **if** statement of the intended parent condition:



An **if** statement, or child condition, is created below the parent condition. Think of each child condition as having the word "and" before it.

For example, a parent condition has one child condition. If the parent condition is true, and if its child condition is true, then the Advanced Condition is true. If the parent condition is true, and if its child condition is false, the next sibling condition is evaluated. If there are no remaining sibling conditions, the Advanced Condition is false.

For information on configuring a newly created **if** or **else if** statement, see Configuring an If Statement on page 138.

Creating a Sibling Condition

To create a sibling to another condition (i.e., a condition that resides at the same level), from the **Advanced Condition** dialog box, click the **Add** button located below the condition at the same level. The following screen shot illustrates which button you would click to create a sibling statement at a particular level:

An **else if** statement, or sibling condition, is created. Think of each sibling condition as having the word "or" before it.

For example, a condition has a sibling condition. If the first condition or one of its child conditions is false, the sibling condition is evaluated.

For information on configuring a newly created **if** or **else if** statement, see Configuring an If Statement on page 138.

Moving and Deleting Conditions

Each condition in the **Advanced Condition** dialog box contains a group of options that allows you to either move or delete the condition entirely.

To access these options, click the **Options** button in the row of the condition you would like to modify:

Option	Description
Delete	Deletes the condition and its child conditions. When attempting to delete a condition that contains one or more child conditions, you are prompted to confirm your selection. Select **Yes** to delete the condition and its child conditions. **Note:** You cannot delete the first condition of an advanced condition.
Move Up	Moves the condition and its child conditions up one row. This option is only available when there is a sibling condition listed above the condition you are attempting to move. **Note:** You can only move conditions within the same level (i.e., a child condition cannot become a parent condition and vice versa).
Move Down	Moves the condition and its child conditions down one row. This option is only available when there is a sibling condition listed below the condition you are attempting to move. **Note:** You can only move conditions within the same level (i.e., a child condition cannot become a parent condition and vice versa).

Configuring Possible Advanced Condition Values

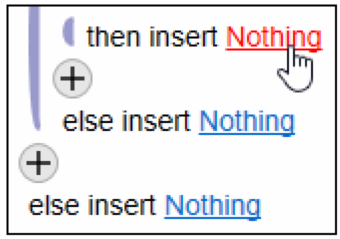
After configuring child conditions for a parent condition, configure the values that should be entered when the condition is true and when the condition is false.

A **then insert** statement is used when the condition is true. An **else insert** statement is used when the condition is false.

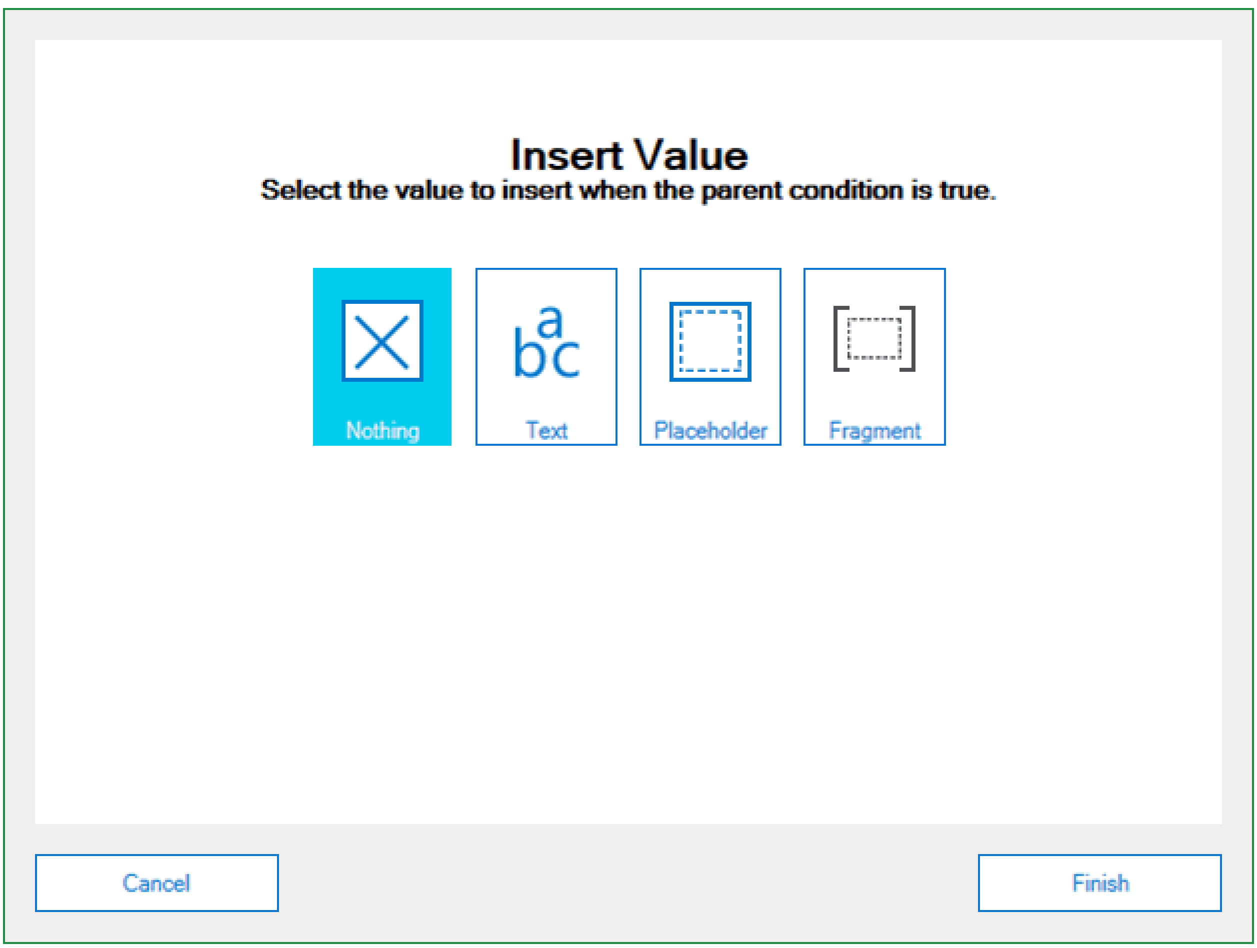
To configure an advanced condition value:

1. From the **Advanced Condition** dialog box, determine whether you want to configure a true or false condition.

   True condition values are configured within **then insert** statements. False condition values are configured within **else insert** statements.
2. Click the hyperlink in either a **then insert** row or an **else insert** row:

   The **Insert Value** dialog box is displayed:



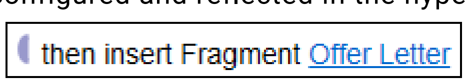
3. Select the value to insert when the parent condition is true or false, depending on whether you selected a **then insert** or an **else insert** hyperlink, respectively.

Value Type	Description
Nothing	The value for the Advanced Condition Placeholder is blank when the parent condition is true or false.
Text	The value for the Advanced Condition Placeholder is static text when the parent condition is true or false. Enter the appropriate text in the **Text** field.
Placeholder	The value for the Advanced Condition Placeholder is the value of another Placeholder when the parent condition is true or false. Select the appropriate Placeholder from the **Placeholder** drop-down list. Note the following: • Other Placeholder values that are formatted to display as a table cannot be inserted using Advanced Condition Placeholders. • If a selected Placeholder in an Advanced Condition Placeholder is deleted, the insert value is reset to **Nothing**. • Placeholders that are formatted to display as bar code images only output a value for an Advanced Condition Placeholder. The bar code image is not generated.

Value Type	Description
Fragment	The value for the advanced condition is a fragment or another template when the parent condition is true or false. **Note:** Inserting a fragment into itself or any dependent fragments is not supported. For example, fragment "HR - Offer" cannot be inserted into fragment "HR - Offer". Additionally, fragment "HR - Offer" cannot be inserted into fragment "Application Approved" if fragment "Application Approved" is inserted into fragment "HR - Offer". After clicking the **Fragment** button, click **Continue**. Select the appropriate fragment or template. To filter the list of available fragments and templates, do one or more of the following: • Select the template group the template or fragment resides in from the **Template Group** drop-down list. The list displays only fragments and templates associated with the template group. • Type the name of the fragment or template into the **Fragment** field. The list is filtered as you type. **Note:** If a selected fragment in an Advanced Condition Placeholder is deleted, the insert value is reset to **Nothing**. Select the **Match destination style** check box if the text in the fragment should match the font, size, and color of the text that is used in the composed document. When the document is composed, the text in the fragment will inherit the characteristics of the character immediately before the Advanced Condition Placeholder. If there is not a character immediately before the Advanced Condition Placeholder, the text in the fragment will inherit the characteristics of the character immediately following the Advanced Condition Placeholder. If the Advanced Condition Placeholder is inserted in a template's header, it will inherit the default document style. If the template's default style is not the style used in the rest of the template, select the Advanced Condition Placeholder and configure it to match the style used in the rest of the template. If the Advanced Condition Placeholder is inserted at the beginning of the document, it will inherit the default document style. If the template's default style is not the style used in the rest of the template, select the Advanced Condition Placeholder and the space immediately following it and configure it to match the style used in the rest of the template.

4. Click **Finish**.

   The possible value is configured and reflected in the hyperlink.



Saving an Advanced Condition

Once all required values are configured, **OK** becomes available.

To save an Advanced Condition Placeholder, from the Advanced Condition dialog box, click **OK**.

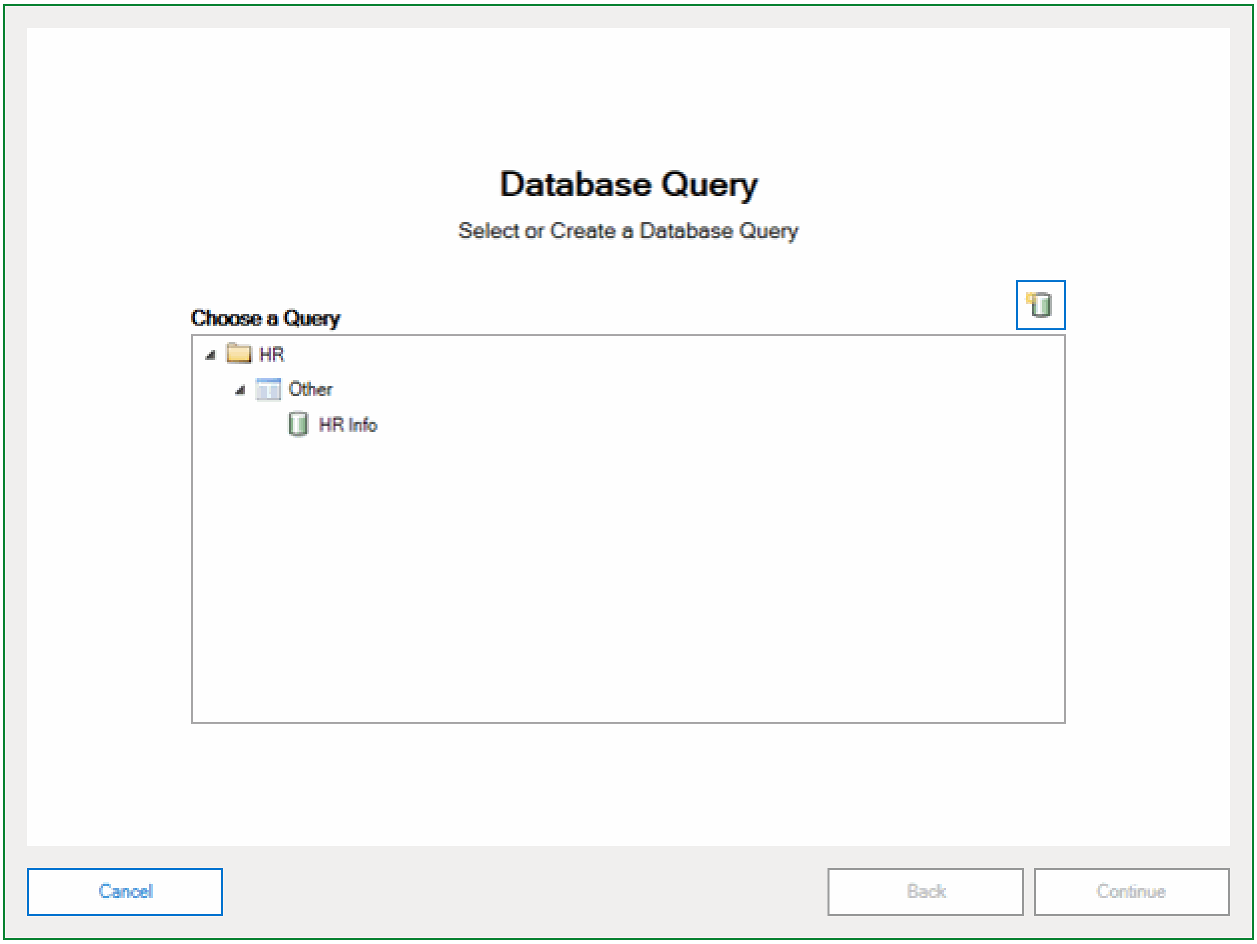
Unlike other Placeholders, Advanced Condition Placeholders do not include dialog boxes for display style, case correction, or keyword mapping; however, if the Advanced Condition value is based on another Placeholder, the configuration for those elements is respected.

Configuring Database Query Placeholders

In the **Create New** drop-down list, **Database Query** inserts a single value (or a set of values formatted in a table) using a SQL query to collect data from a third-party database. You can place results from a specified database query into a template, enabling an end-user to include this information in a document. You can create a database query while you are creating a database query placeholder or before you create a database query placeholder. For information on creating a database query before you create a database query placeholder, see Creating Database Queries on page 152.

To create a Database Query Placeholder:

1. From the **Create New** drop-down list, select **Database Query**.
2. The **Database Query** dialog box is displayed:



Note: To display configured queries as a list, right-click and select **Show as List**. To show configured queries as a tree view, right-click and select **Show as Tree**.

3. Select a pre-configured database query from the **Choose a Query** pane, or click **New Query** to create a new database query.

   a. If you are creating a new database query, the **New Database Query** fields are displayed.
   b. See step 5 of Creating Database Queries on page 152 for new database query configuration.
   c. Click **Done**.
   d. The **Choose a Query** pane is displayed with the new database query selected.
4. Click **Continue**.
5. The **Output Style** dialog box is displayed. Select one of the following options to determine how the results of your query should be displayed:
   - **Insert the first result of a single Column** - Select to insert the first result of a single column on the document. Type the name of the column in the **Enter Column Name** field.
   - **Insert the results as an image** - Select to insert the results of the query as an image. The results of the query must be a binary large object (BLOB) column, and must be an image format that can be inserted into a Word document. Type the name of the column in the **Enter Column Name** field.
   - **Insert all values as a Table** - Select to insert all the values retrieved by the SQL query as a table embedded on the document. Instances of this Placeholder appear on the document as an empty table. Any column headers entered in the top row of this table are preserved when the values are filled in. Table styles are also preserved.

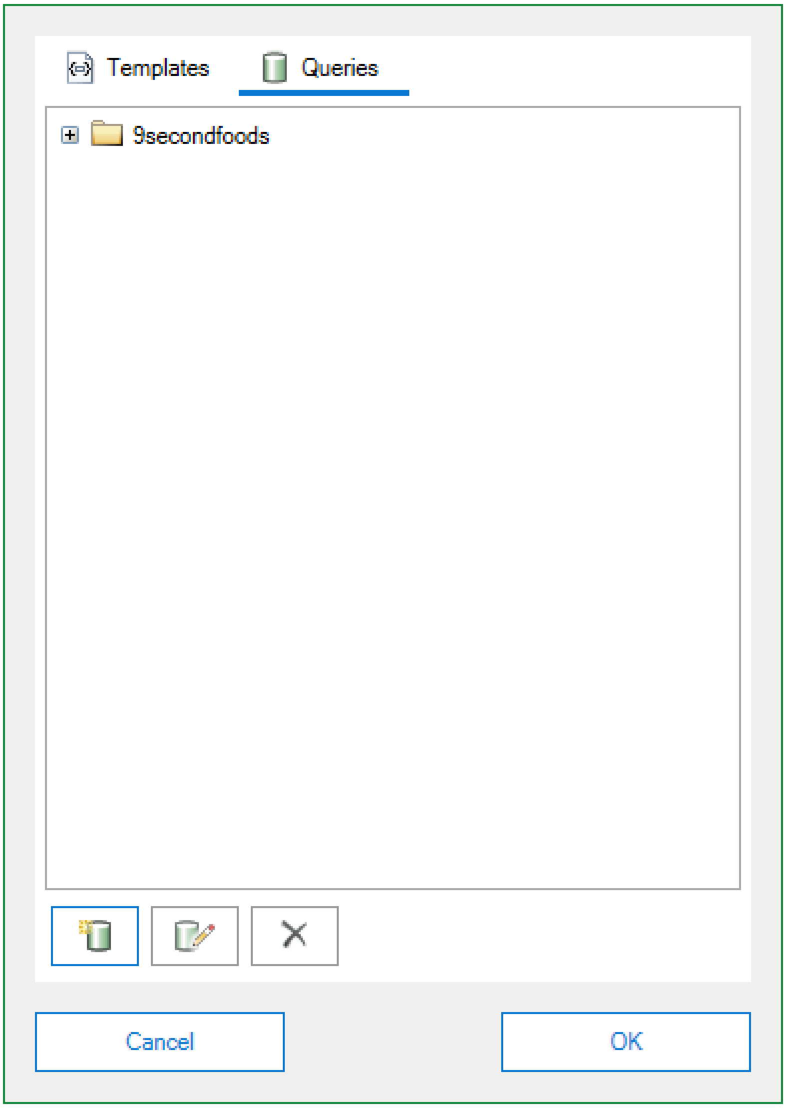
Note: Any empty rows retrieved by your query will not be displayed on the document.

6. Click **Finish**.

Creating Database Queries

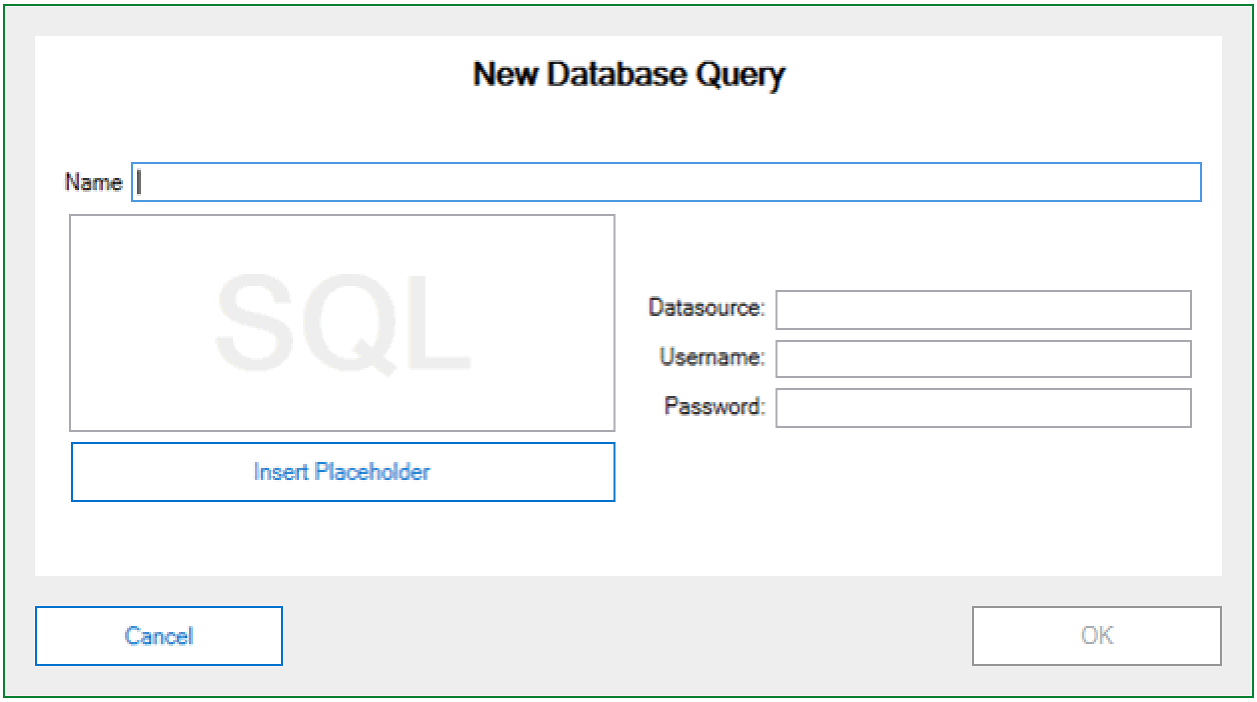
To create a database query before you configure a Database Query Placeholder:

1. Click **Control Panel**.
2. Select the **Queries** tab:



3. Click **New Query**:

4. The **New Database Query** dialog box is displayed:



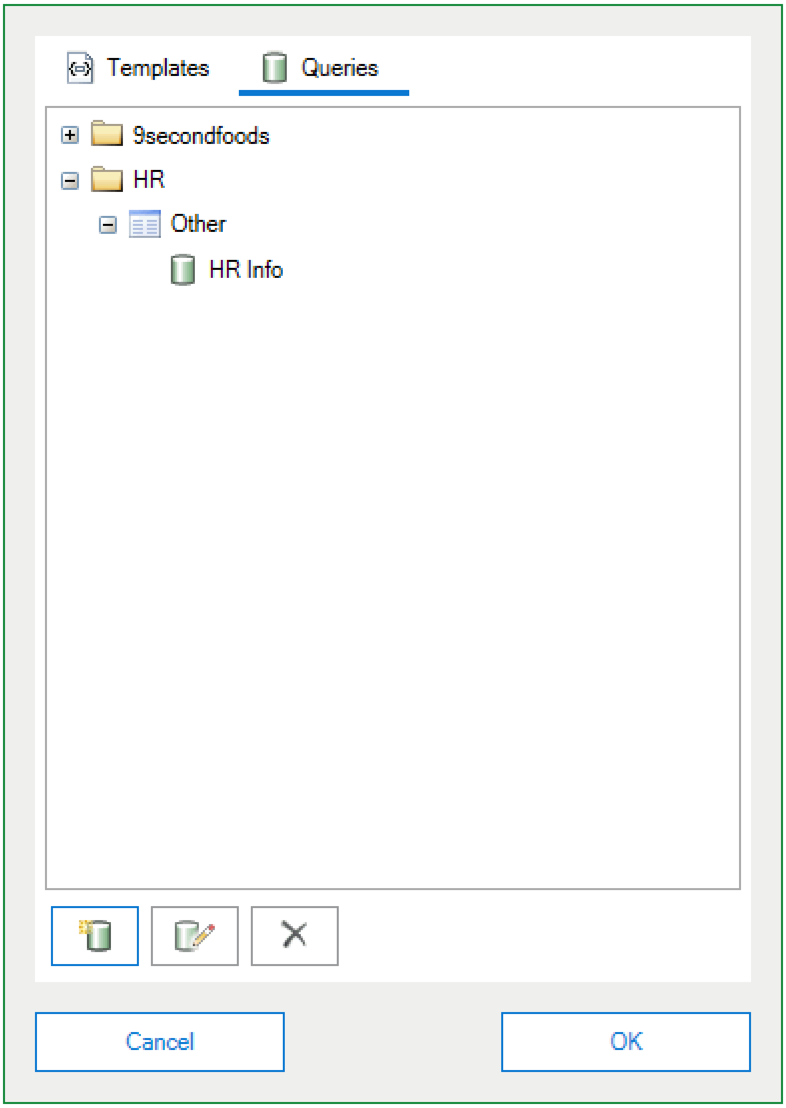
5. Enter the appropriate information in the fields provided. The fields are detailed in the following table.

Option	Description
Name	Assign a name for the query. **Note:** This field is limited to 40 characters when using a database that supports ANSI characters. When using a database that supports Unicode characters, this field is limited to 20 characters.
Text Box	Type the SQL Query that will pull information from the database you are connecting to. Click **Insert Placeholder** to select an existing placeholder to add to the SQL Query.
Datasource	Type the data source name. **Note:** This field is limited to 100 characters when using a database that supports ANSI characters. When using a database that supports Unicode characters, this field is limited to 50 characters.

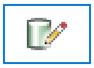
Option	Description
Username	Type the user name that will be used to access the datasource. **Note:** This field is limited to 75 characters when using a database that supports ANSI characters. When using a database that supports Unicode characters, this field is limited to 37 characters.
Password	Type the password, if applicable, that corresponds to the user name you specified. **Note:** This field is limited to 200 characters when using a database that supports ANSI characters. When using a database that supports Unicode characters, this field is limited to 100 characters.

6. Click **OK**.

7. The query you created is displayed:



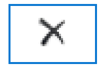
- To edit a query, select the query and click **Edit Query**:



Enter the appropriate information into the fields provided. To update the password that corresponds to the user name you specified, click **Reset Password** and enter the new password into the **Password** field.

Note: This field is limited to 200 characters when using a database that supports ANSI characters. When using a database that supports Unicode characters, this field is limited to 100 characters.

- To delete a query, select the query and click **Delete Query**:



- To show configured queries as a list, right-click and select **Show as List**. To show configured queries as a tree view, right-click and select **Show as Tree**.

Parameterized Queries

Parameterized Queries allow data gathered from an ODBC connection to be more dynamic. Within a SQL query, you can use the values of other Placeholders in the template as part of your query.

For example:

```
SELECT column1 FROM table WHERE column2 = ‘&PlaceholderName’
```

In this example, &PlaceholderName will be replaced by the value of the field named 'PlaceholderName' before the query is executed.

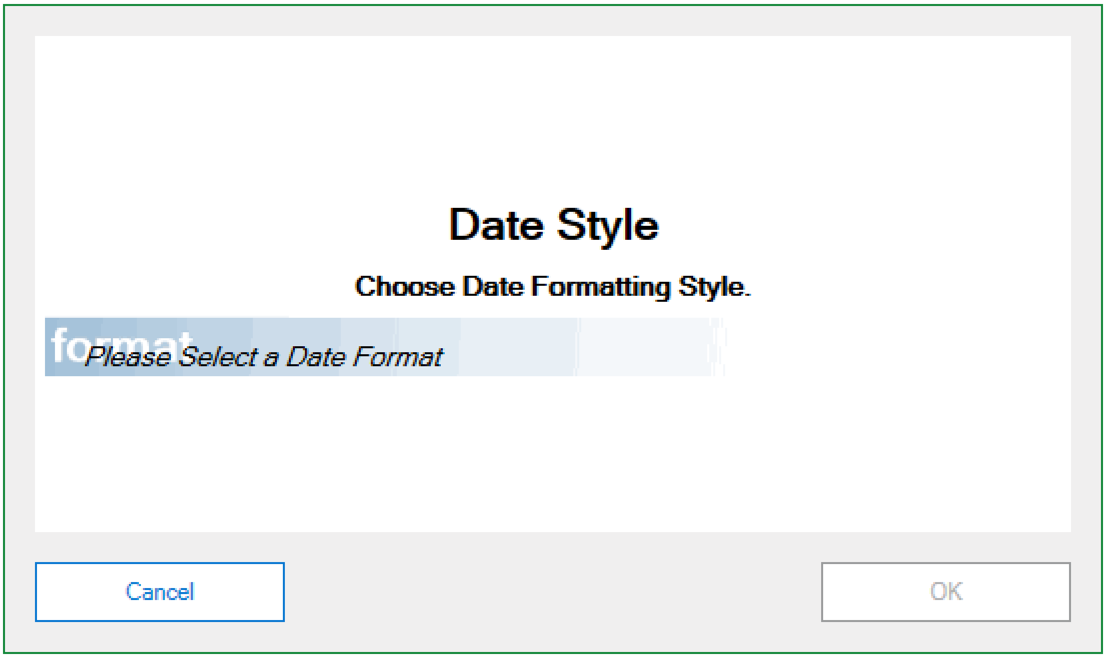
Note: Ensure the syntax used for the SQL query is valid. The 'PlaceholderName' that is contained in the SQL query cannot contain any spaces.

Configuring Date/Time Placeholders

In the **Create New** drop-down list, **Date/Time** inserts the current date and time the document is composed.

To create a Date/Time Placeholder:

1. From the **Create New** drop-down list, click **Date/Time**.
2. The **Date Style** dialog box is displayed:



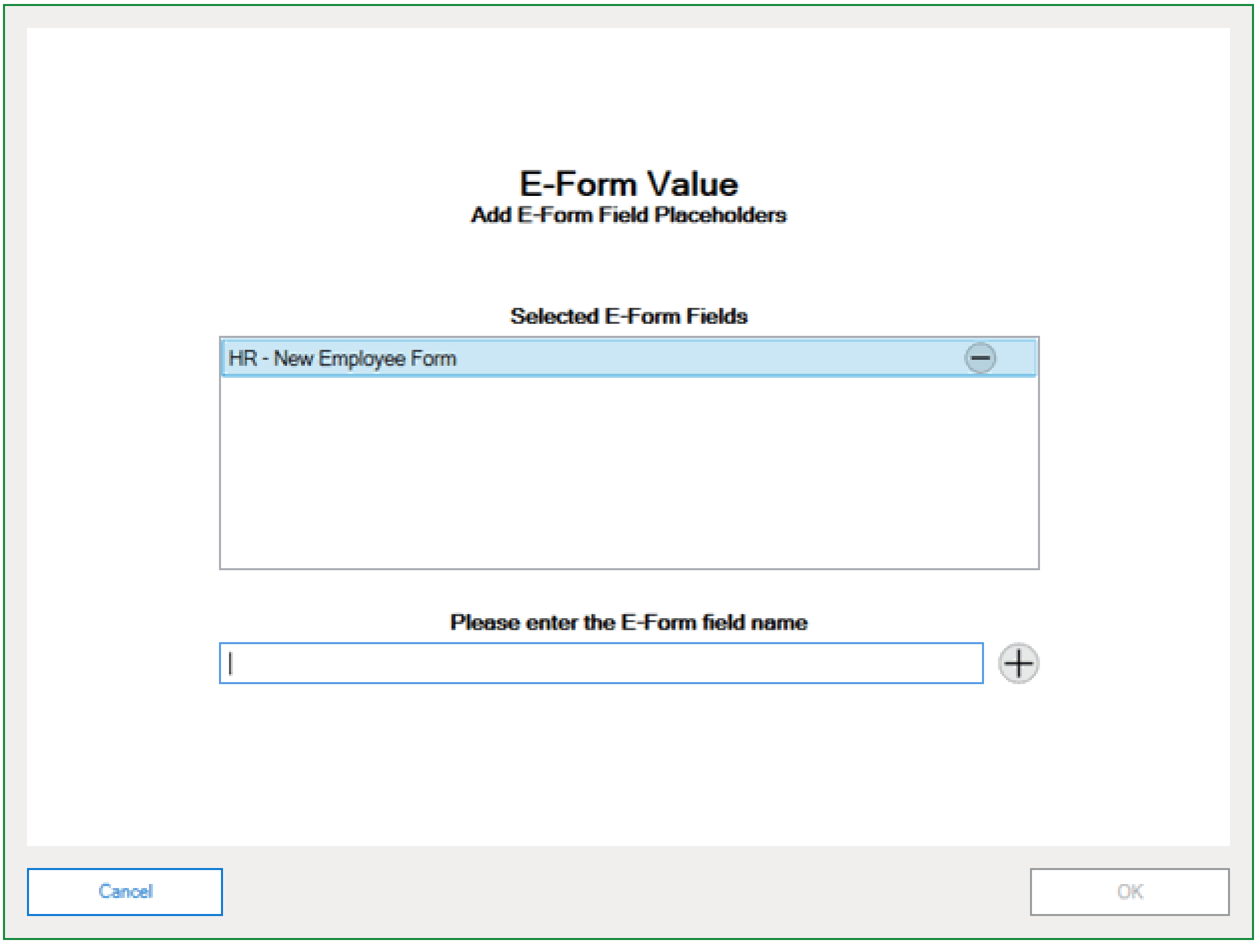
3. Select a date format from the **Please Select a Date Format** drop-down list. For a complete list of available date/time formats, see Configuring Display Style on page 198.
4. Click **OK**.

Configuring E-Form Value Placeholders

You can configure a Placeholder that extracts a value from a non-keyword field of an E-Form stored in OnBase. When the document is created, the value in the specified E-Form field is used.

To create an E-Form Value Placeholder:

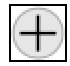
1. From the **Create New** drop-down list, select **E-Form Value**.
2. The **E-Form Value** dialog box is displayed:



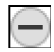
3. Type the E-Form field name in the **Please enter the E-Form field name** field.
   Because the E-Form Value is designed to pull non-keyword fields from an E-Form, OnBase input types such as **OBKey_101_1** cannot be used. See the E-Forms module reference guide for more information on E-Form field formats.

Note: The **Please enter the E-Form field name** field is limited to 40 characters and must be formatted like the E-Form field name. It is case-sensitive.

4. Click **Add E-Form Field** to add the E-Form field to the **Selected E-Form Fields list**.



To remove an E-Form field from the **Selected E-Form Fields** list, select the E-Form field and click **Delete E-Form Field**.



5. Click **OK**.

Configuring Document Fragment Placeholders

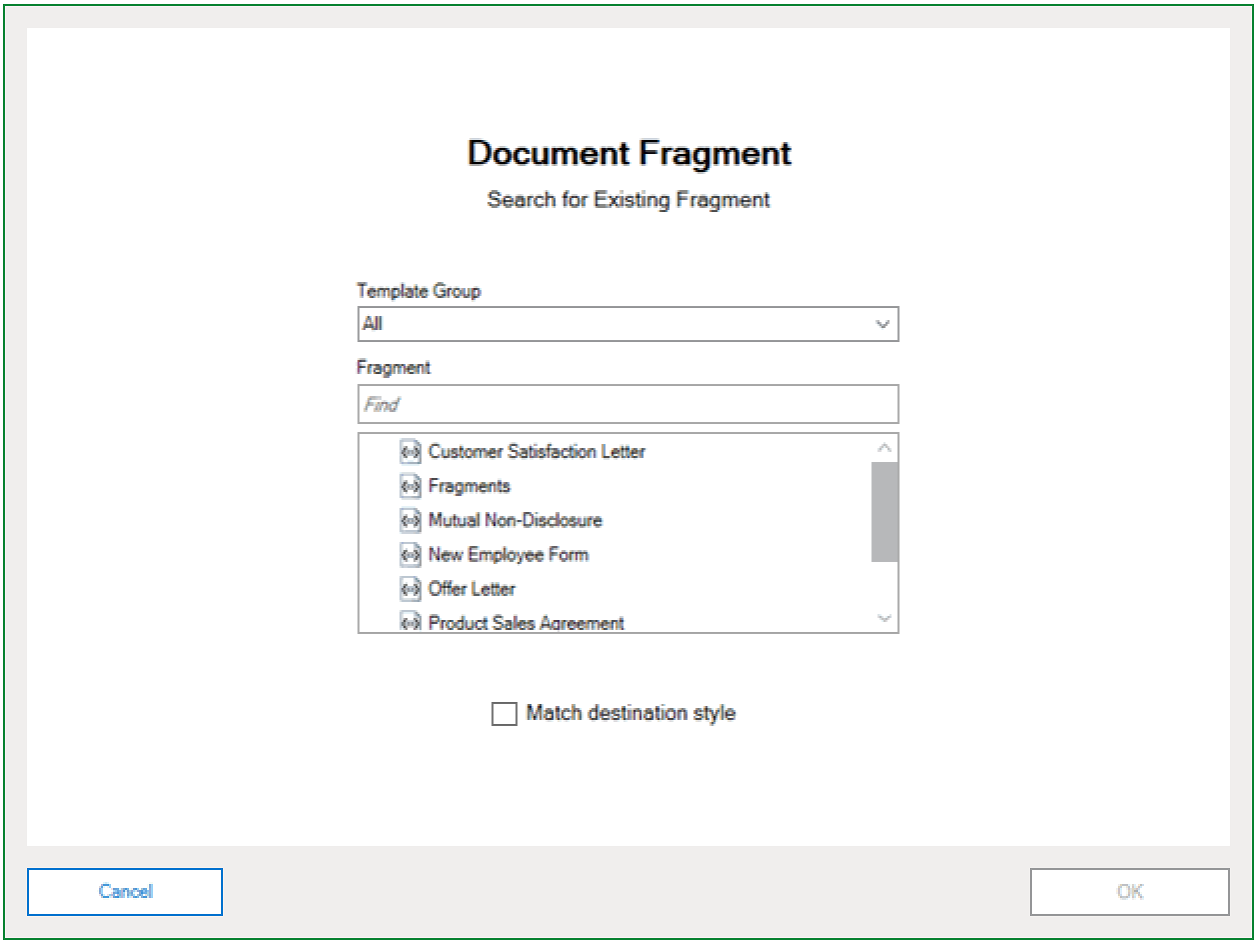
In the **Create New** drop-down list, **Document Fragment** inserts an existing fragment or template into the current template. A fragment is composed of existing text, Microsoft Word objects, or a combination of the two. Empty fragments can also be created. See Creating Document Fragments on page 137 for more information on creating fragments.

Note the following:

- Inserting fragments into tables is not supported.
- Smart Tags are not supported in fragments. Text interpreted by Microsoft Word as a Smart Tag is not copied to the composed document.
- When a bullet list style is applied to a fragment, the bullet characters are displayed outside of the fragment.
- Inserting a fragment into itself or any dependent fragments is not supported. For example, fragment **HR - Offer** cannot be inserted into fragment **HR - Offer**. Additionally, fragment **HR - Offer** cannot be inserted into fragment **Application Approved** if fragment **Application Approved** is inserted into fragment **HR - Offer**.

To create a Document Fragment Placeholder:

1. From the **Create New** drop-down list, click **Document Fragments**. The **Document Fragment** dialog box is displayed:



2. Select a fragment or template.

   To filter the list of available fragments and templates, do one or more of the following:
   - Select the template group associated with the fragment or template from the **Template Group** drop-down list. The list displays only fragments and templates associated with the template group.
   - Type the name of the fragment or template into the **Fragment** field. The list is filtered as you type.

Tip: You can type any part of the fragment or template name to yield results.

Note: Fragments located in the current template and in the bodies of other templates are available. However, fragments located in the headers and footers of other templates are not available.

3. Select the **Match destination style** check box if the text in the fragment should match the font, size, and color of the text that is used in the composed document.

   The characteristics the text in the fragment inherits are dependent upon its insertion location:
   - If there is a character immediately before the Placeholder, the text in the fragment inherits the characteristics of that character.
   - If there is not a character immediately before the Placeholder, the text in the fragment inherits the characteristics of the character immediately following the Placeholder.
   - If the Placeholder is inserted in a template's header, it inherits he default document style. If the template's default style is not the style used in the rest of the template, select the Placeholder and configure it to match the style used in the rest of the template.
   - If the Placeholder is inserted at the beginning of the document, it inherits the default document style. If the template's default style is not the style used in the rest of the template, select the Placeholder and the space immediately following it and configure it to match the style used in the rest of the template.

   See Creating Document Fragments on page 137 for more information.
4. Click **OK**.

Configuring HTML Prompt Placeholders

In the **Create New** drop-down list, **HTML Prompt** inserts a specified value (or multiple values) from an HTML Form. HTML Forms allow end-users to enter information into an HTML Form that will then be transferred into a document, and fill in the HTML Prompt Placeholder on the template.

Before configuring an HTML Prompt Placeholder, ensure:

- The HTML form template that the HTML form prompt references has been created.
- Each field on the HTML form template specifies a name attribute in its tag.

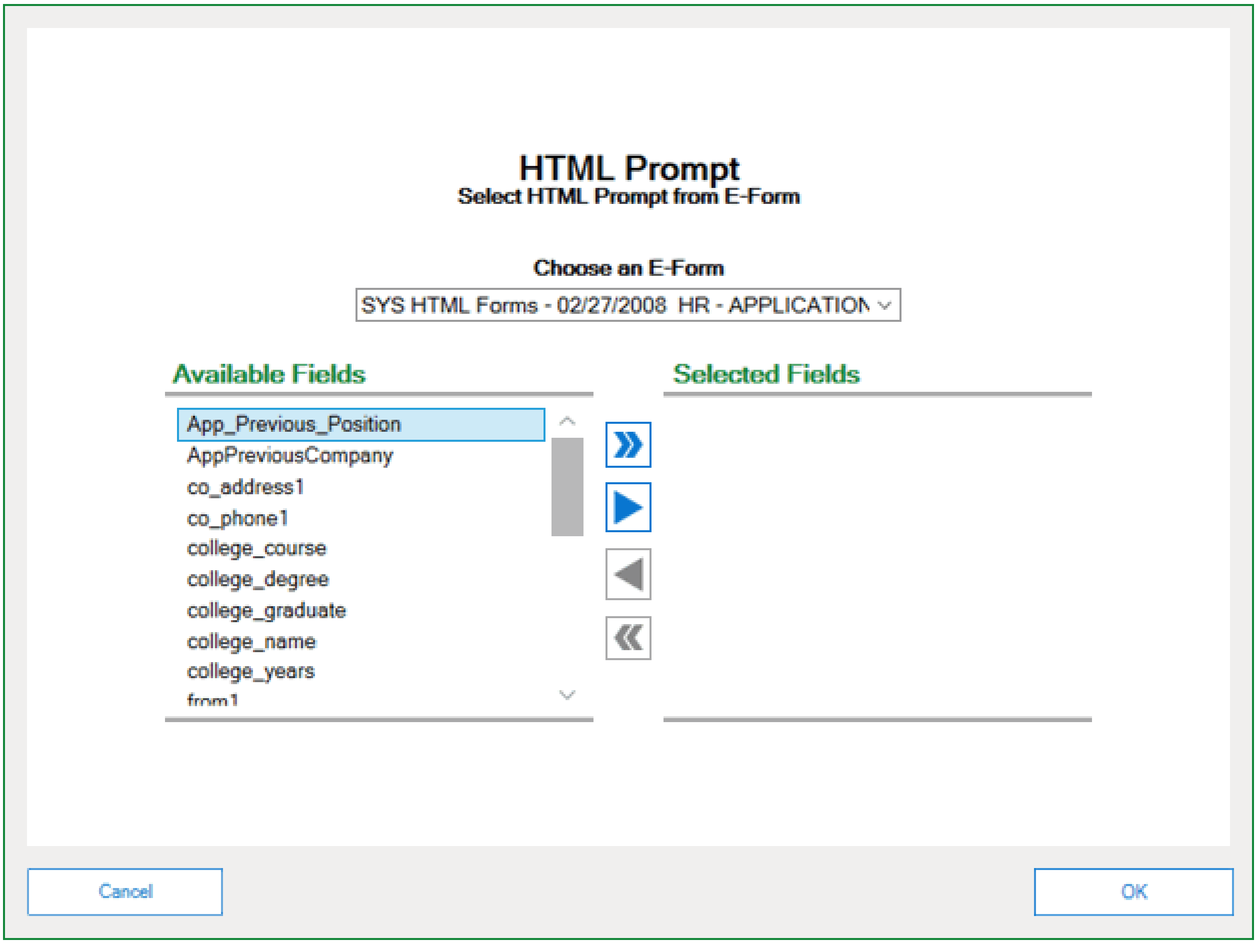
  When assigning field name attributes, it is considered a best practice to use an intuitive naming convention. This makes it is easier to select the correct field name when configuring the HTML form prompt. For example, you might assign a field name attribute called **TimeOff_StartDate**, where **TimeOff** references the HTML form template, and **StartDate** references the display name of the field.

Caution: Document Composition HTML form prompts do not support OnBase E-Form constructs, such as the use of AutoFill Keyword Set buttons (i.e., **OBBtn_KS###** or **OBBtn_ExpandKS###**).

- The HTML form template was imported into OnBase using the **SYS HTML Forms** Document Type.

To create an HTML Prompt Placeholder:

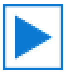
1. From the **Create New** drop-down list, select **HTML Prompt**.
2. The **HTML Prompt** dialog box is displayed:



3. From the **Choose an E-Form** drop-down list, select a pre-configured HTML form.

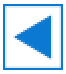
Note: If there are multiple HTML forms with the same name, the Document Handle will display next to the HTML form name in parentheses.

4. From the **Available Fields** list, select the HTML form field from the pre-configured HTML form that will be used for this placeholder. Hold **Ctrl** to select multiple fields.
   a. To add fields to the **Selected Fields** list, double-click a single field or click **Add Selected Items**.



   To add all available fields to the **Selected Fields** list, click **Add All Items**.

b. To remove fields from the **Selected Fields** list, select a field or hold **Ctrl** to select multiple fields. Double-click a single field or click **Remove Selected Items**.



To remove all available fields from the **Selected Fields** list, click **Remove All Items**.

5. Click **OK**.

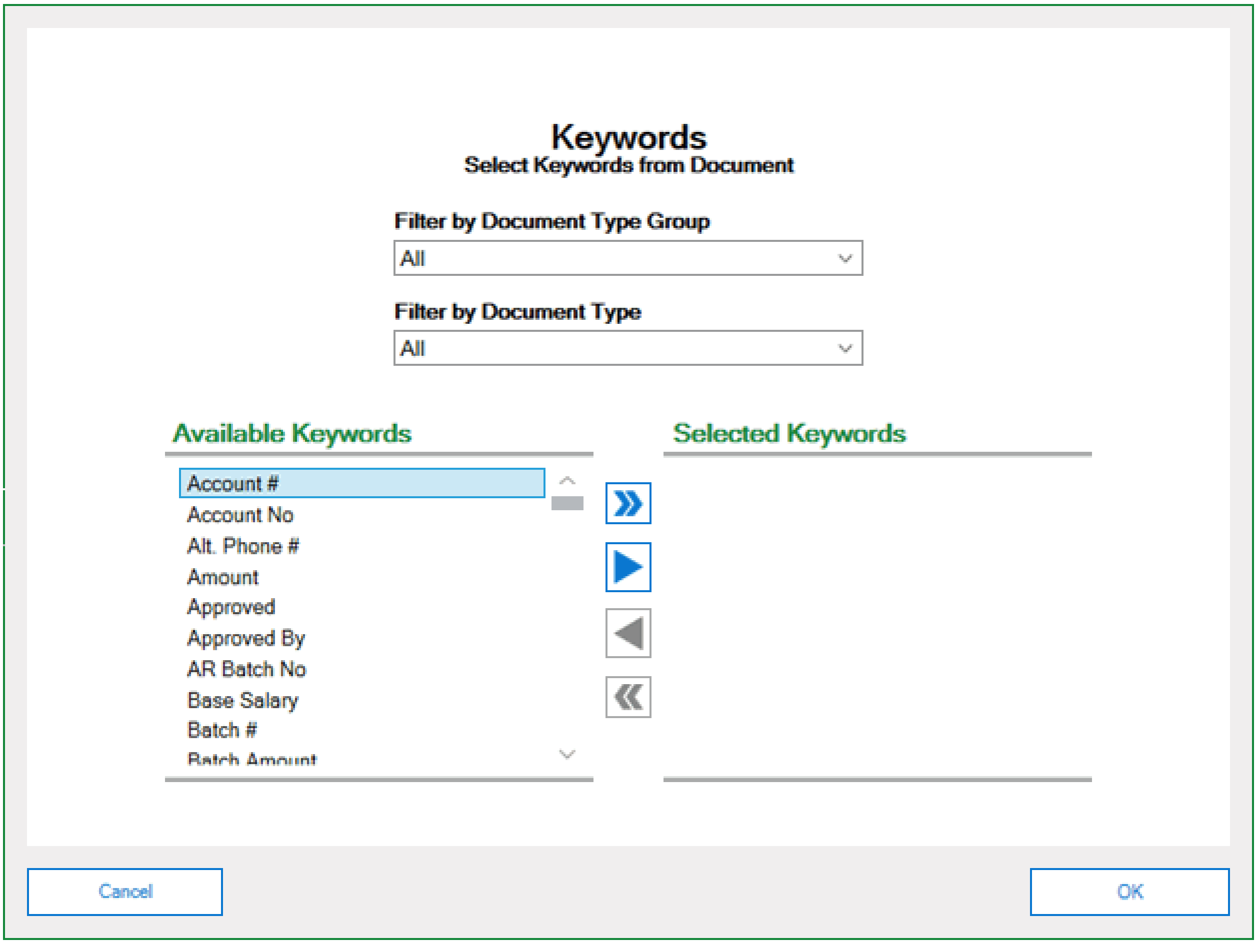
Note: HTML forms should not be configured to use embedded scripting that utilizes XML template groups. Instead, gather the needed data from the HTML form, then use a script Placeholder within Document Composition to submit the request.

Configuring Keywords Placeholders

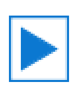
In the **Create New** drop-down list, **Keywords** inserts a Keyword Value from the source document or an Application Enabler scrape event.

To create a Keywords Placeholder:

1. From the **Create New** drop-down list, select **Keywords**.
2. The **Keywords** dialog box is displayed:



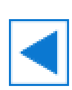
3. Select a Document Type Group from the **Filter by Document Type Group** drop-down list.
4. Select a Document Type from the **Filter by Document Type** drop-down list**.**
5. From the **Available Keywords** list, select a Keyword, or hold **Ctrl** to select multiple Keywords.
    a. To add Keywords to the **Selected Keywords** list, double-click a single Keyword or click **Add Selected Items**.

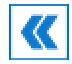
    To add all available Keywords to the **Selected Keywords** list, click **Add All Items**.

    b. To remove Keywords from the **Selected Keywords** list, select a Keyword or hold **Ctrl** to select multiple Keywords. Double-click a single Keyword or click **Remove Selected Items**.

To remove all available Keywords from the **Selected Keywords** list, click **Remove All Items**.



6. Click **OK**.

Note: Multiple Keyword Values for a Keyword Type are not supported.

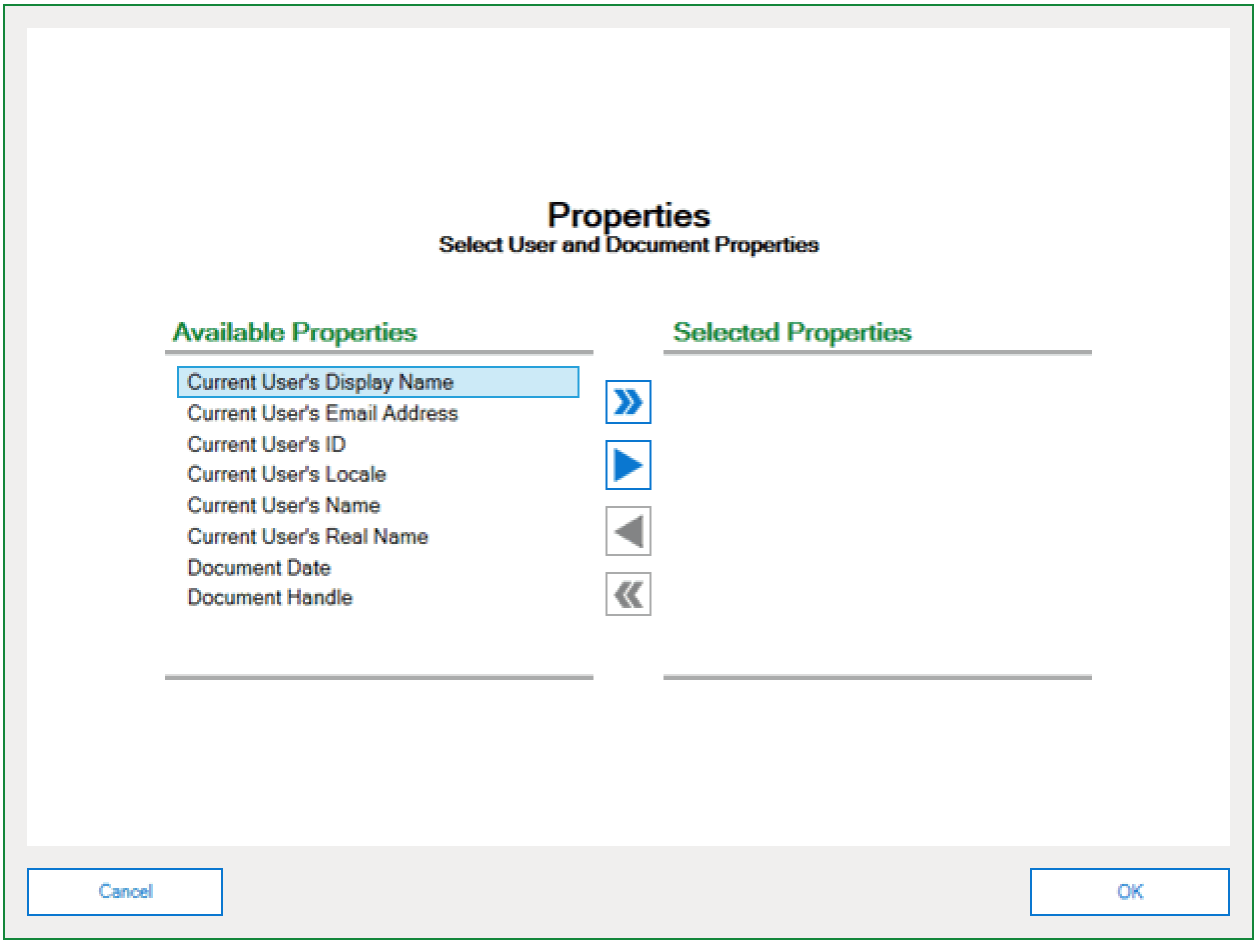
Note: For more information on using Application Enabler to create documents with Document Composition, see the Application Enabler documentation.

Configuring Properties Placeholders

In the **Create New** drop-down list, **Properties** inserts the specified User Property from the user creating the document or the specified Document Property from the source document.

To create a Properties Placeholder:

1. From the **Create New** drop-down list, select **Properties**.
2. The **Properties** dialog box is displayed:

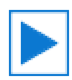

Properties
Select User and Document Properties
Available Properties
Selected Properties
Current User's Display Name
Current User's Email Address
Current User's ID
Current User's Locale
Current User's Name
Current User's Real Name
Document Date
Document Handle
Cancel
OK

3. From the **Available Properties** list, select a Property, or hold **Ctrl** to select multiple Properties.

   Select from the following:

   - **Current User's Display Name** - Either the name or the real name of the current user's account, depending on Global Client Settings configuration.
   - **Current User's Email Address** - The specified email address of the current user's account.
   - **Current User's ID** - The unique system-assigned number of the current user's account.
   - **Current User's Locale** - The Windows system locale of the current user's workstation.
   - **Current User's Name** - The specified name of the current user's account.
   - **Current User's Real Name** - The specified real name of the current user's account.
   - **Document Date** - The Document Date of the source document.
   - **Document Handle** - The Document Handle of the source document.

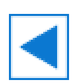
   a. To add Properties to the **Selected Properties** list, double-click a single Property or click **Add Selected Items**.

   To add all available Properties to the **Selected Properties** list, click **Add All Items**.

   b. To remove Keywords from the **Selected Properties** list, select a Property or hold **Ctrl** to select multiple Properties. Double-click a single Property or click **Remove Selected Items**.

   To remove all available Properties from the **Selected Properties** list, click **Remove All Items**.

4. Click **OK**.

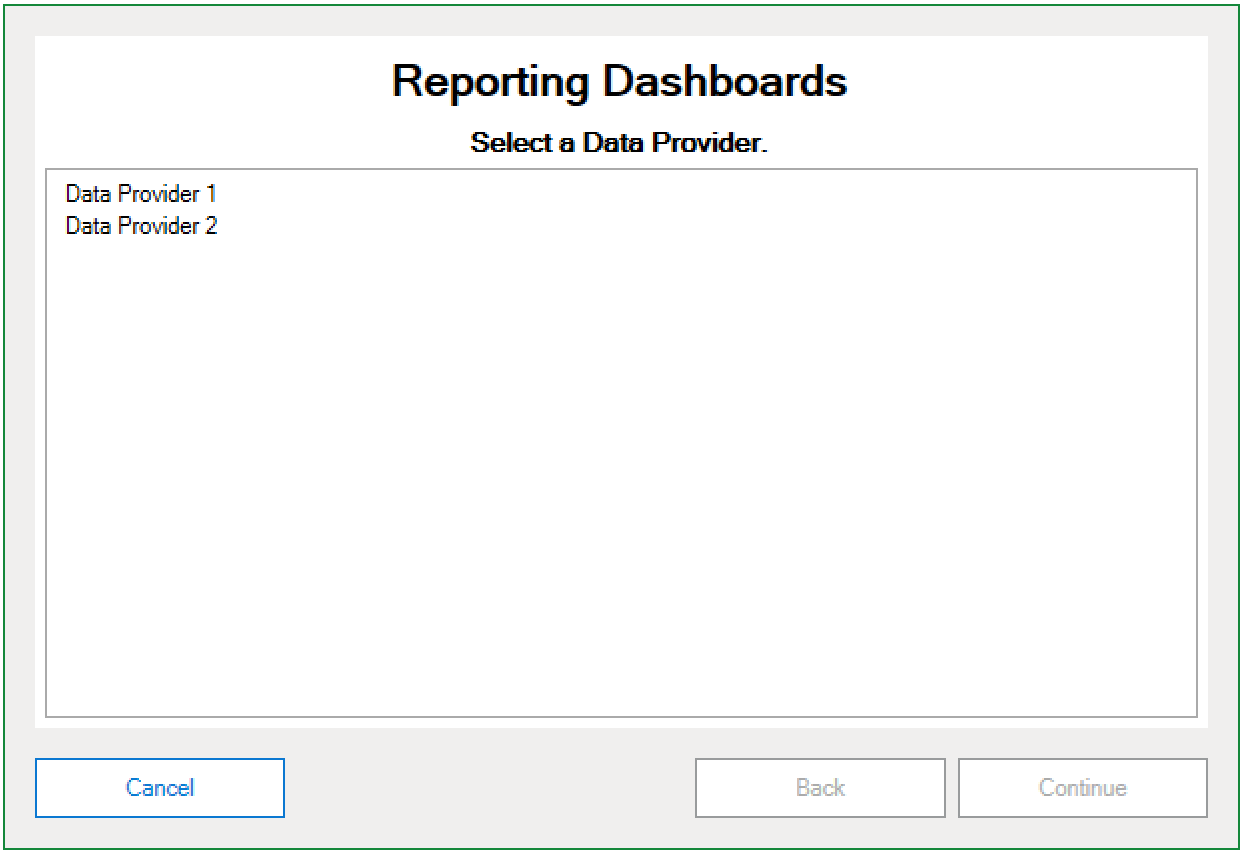
Configuring Reporting Dashboards Placeholders

Dashboards can be added to a template to display data returned from a configured data provider in a composed document.

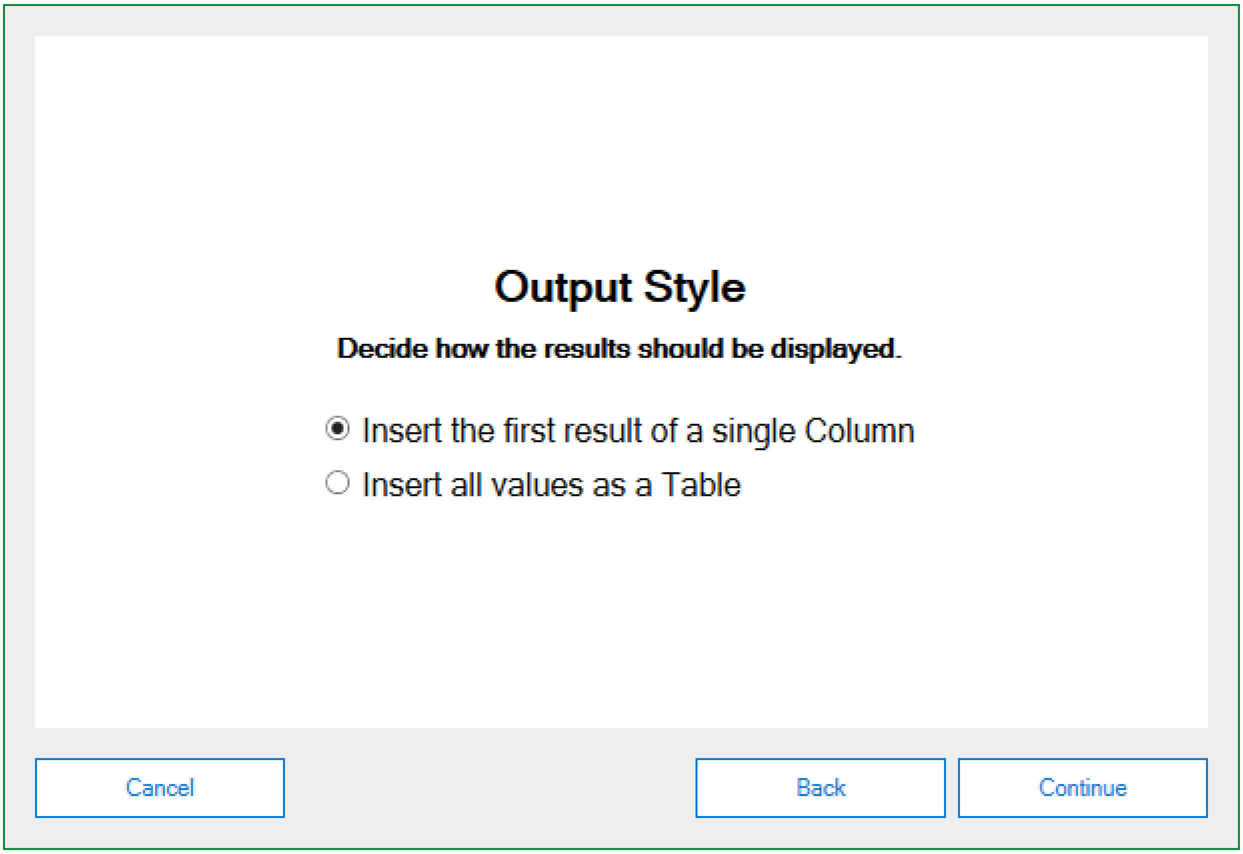
Note: You must be licensed for **Reporting Dashboards** in order to access dashboards.

To create a Reporting Dashboards Placeholder:

1. From the **Create New** drop-down list, click **Reporting Dashboards**. The **Reporting Dashboards** dialog box is displayed:

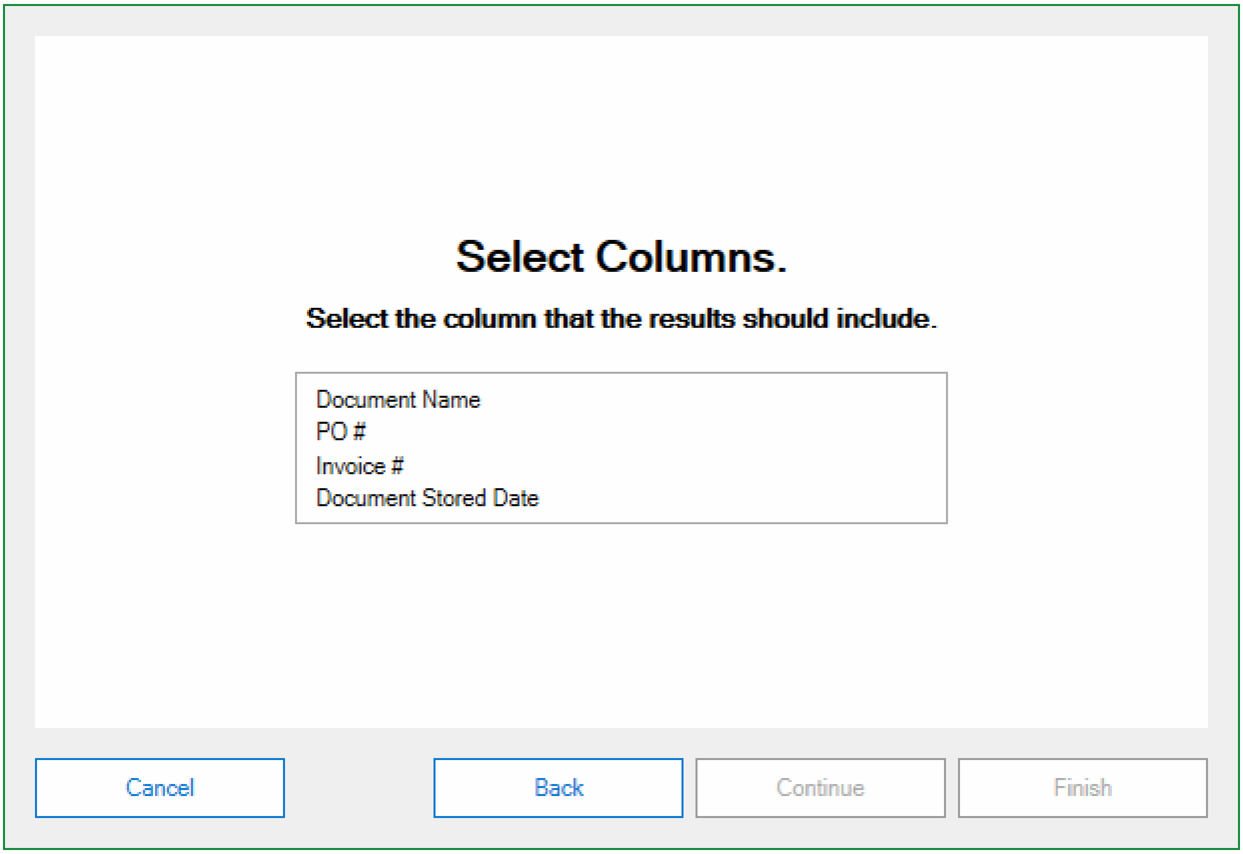


2. Select a data provider and click **Continue**. The Output Style dialog box is displayed:



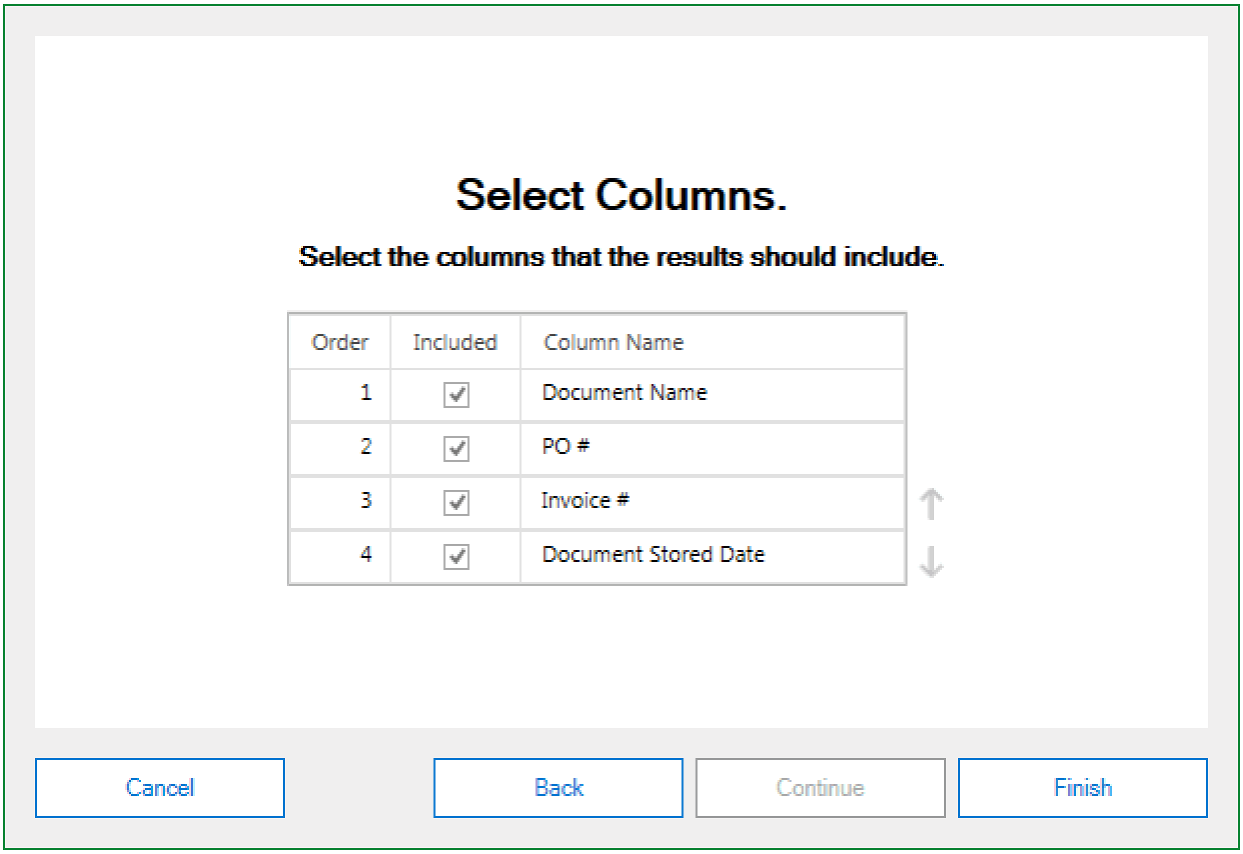
3. Select one of the following options to determine how the results should be displayed:
   - **Insert the first result of a single Column** - Select to insert the first result of a single column on the document.
   - **Insert all values as a Table** - Select to insert all the values retrieved by the data provider as a table embedded on the document. Instances of this Placeholder appear on the document as an empty table. Any column headers entered in the top row of this table are preserved when the values are filled in. Table styles are also preserved.

4. Click **Continue**. Depending on the output style selected, the **Select Columns** dialog box is displayed in one of the following ways:
   - If **Insert the first result of a single Column** was selected, the **Select Columns** dialog box displays a list of available display columns:

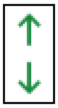


     Select a display column and skip to step 7.

- If **Insert all values as a Table** was selected, the **Select Columns** dialog box displays a list of available display columns that can be customized:



5. In the **Included** column, select all display columns that the results should include.
6. To reorder the display columns, select a display column and click **Move Up** or **Move Down**:



7. Click **Finish**.

Note: For information on configuring dashboards, see the **Reporting Dashboards** module reference guide.

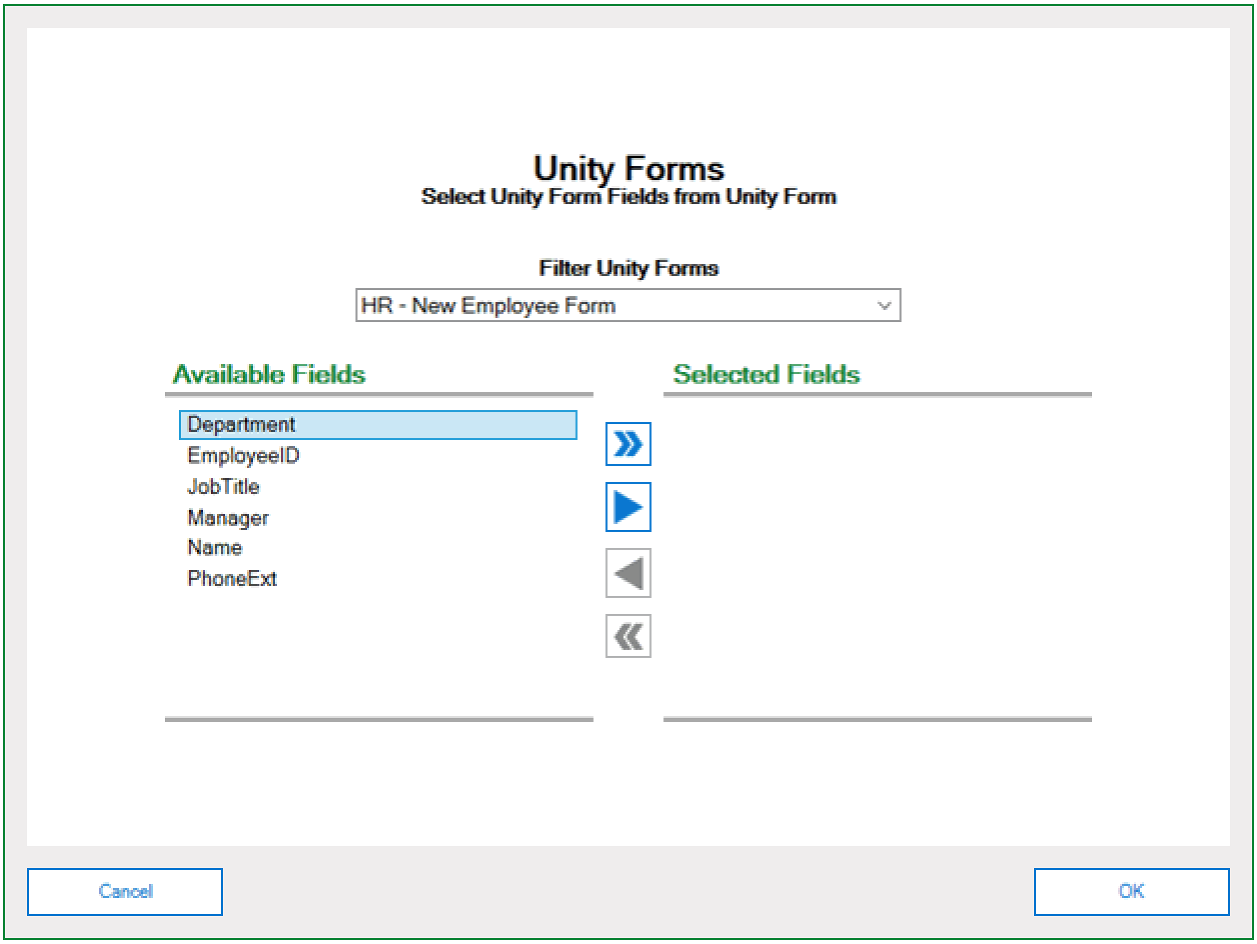
Configuring Unity Forms Placeholders

You can configure a Placeholder that extracts a value from a Unity Form stored in OnBase. When the document is created, the value in the specified Unity Form field is used.

Note: You must be licensed for Unity Forms to use a Unity Form field value for a Placeholder.

To create a Unity Form Value Placeholder:

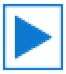
1. From the **Create New** drop-down list, select **Unity Form Values**.
2. The **Unity Forms** dialog box is displayed:



3. From the **Filter Unity Forms** drop-down list, select the Unity Form containing the field you want to select.
4. From the **Available Fields** list, select the field from which you want to import a value or hold **Ctrl** to select multiple fields.

Note: Not all Unity Form fields are supported with Placeholders. Supported field types include calculated fields and fields with the following data types: currency, date, date/time, numeric (up to 9 digits), numeric (up to 20 digits), alphanumeric, and text.

a. To add fields to the **Selected Fields** list, double-click a single field or click **Add Selected Items**.



To add all available fields to the **Selected Fields** list, click **Add All Items**.

b. To remove fields from the **Selected Fields** list, select a field or hold **Ctrl** to select multiple fields. Double-click a single field or click **Remove Selected Items**.

To remove all available fields from the **Selected Fields** list, click **Remove All Items**.

5. Click **OK**.

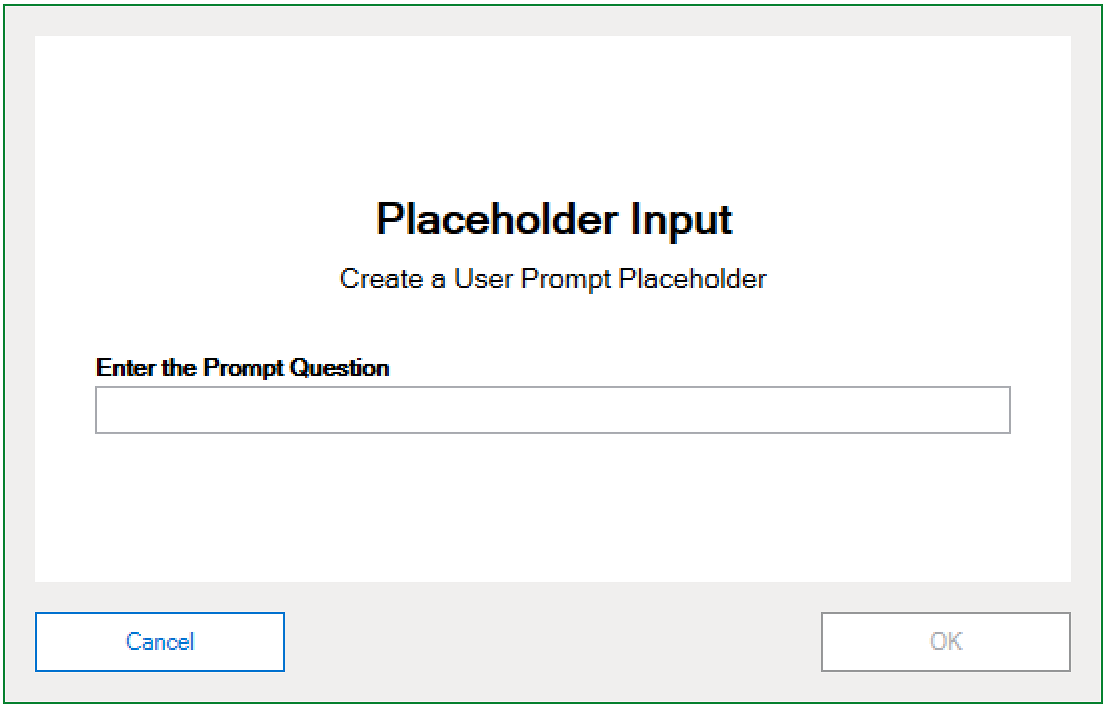
Configuring User Prompt Placeholders

In the **Create New** drop-down list, **User Prompts** inserts a prompt for a single value specified in a User Prompt. The Placeholder value will be provided by the user when the document is composed.

Note: User Prompt Placeholders are ignored when configured on templates used for non-interactive composition, such as through Workflow, Unity API, and Scripting. This is because **User Prompt** Placeholders require user interaction, which does not take place in non-interactive composition.

To create a User Prompt Placeholder:

1. From the **Create New** drop-down list, select **User Prompt**.
2. The User Prompt **Placeholder Input** dialog box is displayed.



3. Type the User Prompt text in the **Enter the Prompt Question** field.

Note: User prompts are limited to 255 characters.

4. Click **OK**.

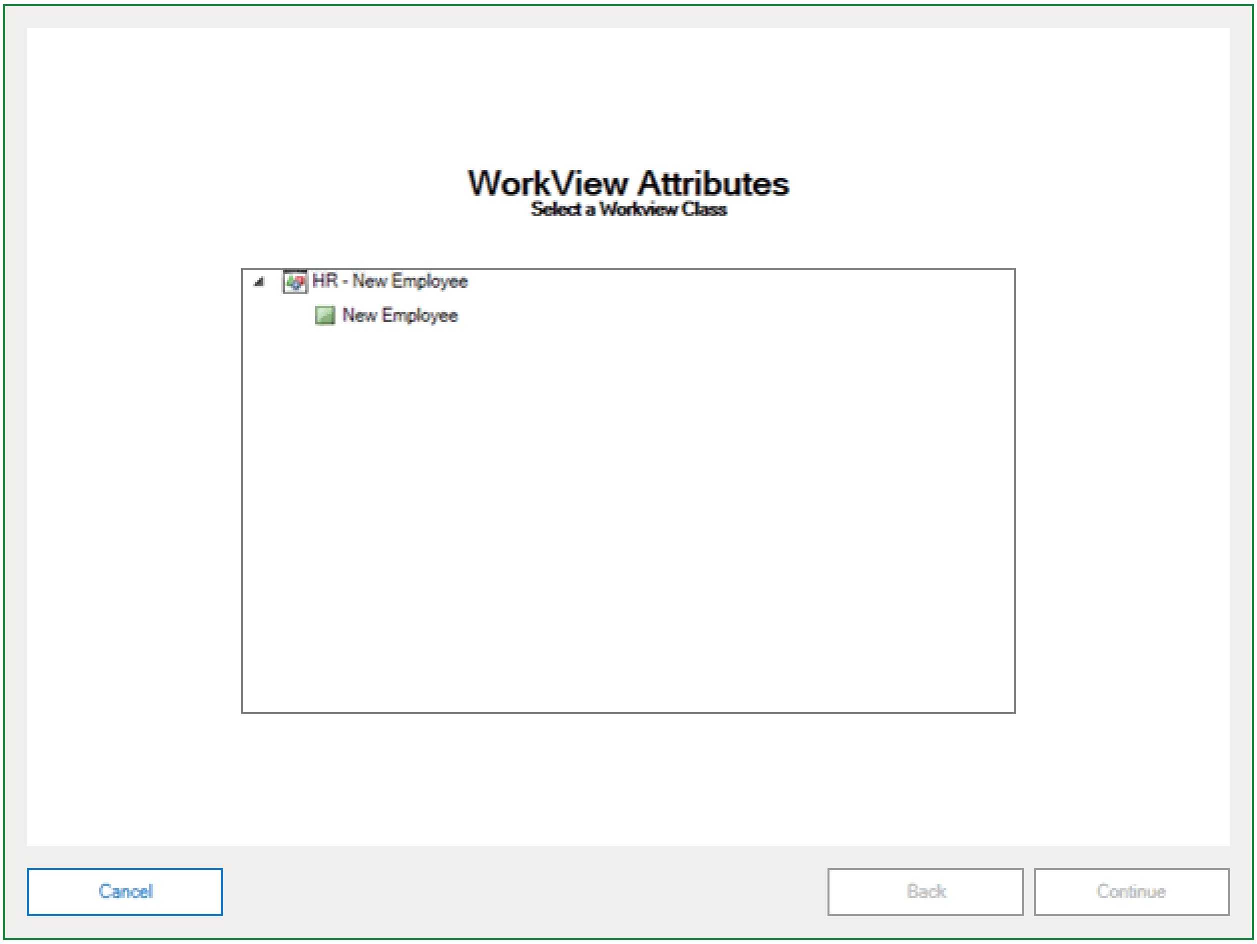
Configuring WorkView Attributes Placeholders

In the **Create New** drop-down list, **WorkView Attributes** inserts a value from a WorkView object.

Note: You must be licensed for WorkView in order to access attributes. The WorkView database tables must have also been created. See the **WorkView | Case Manager** module reference guide for more information.

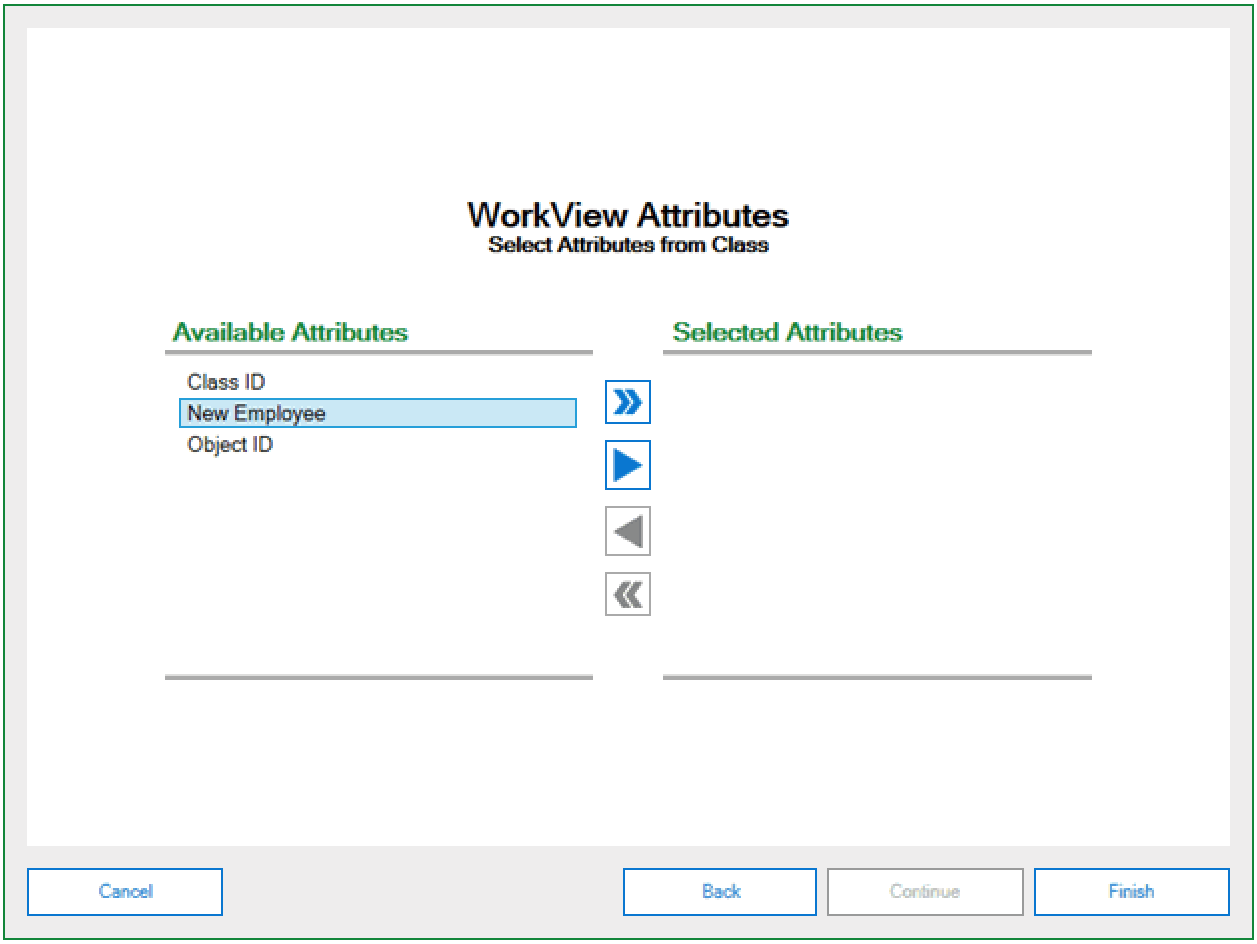
To create a WorkView Attribute Placeholder:

1. From the **Create New** drop-down list, select **WorkView Attributes.**
2. The **WorkView Attributes** dialog box to select a Class is displayed.



3. Use the tree structure to expand an application and select a WorkView Class
4. Click **Continue**.

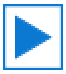
5. The **WorkView Attributes** dialog box to select attributes is displayed.



6. From the **Available Attributes** list, select an attribute or hold **Ctrl** to select multiple attributes.

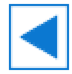
Note: The Document, Calculated, and Formatted Text WorkView attribute data types are not supported for use with Document Composition Template Builder.

a. To add attributes to the **Selected Attributes** list, double-click a single attribute or click **Add Selected Items**.



To add all available attributes to the **Selected Attributes** list, click **Add All Items**.

b. To remove attributes from the **Selected Attributes** list, select an attribute or hold **Ctrl** to select multiple attributes. Double-click a single attribute or click **Remove Selected Items**.



To remove all available attributes from the **Selected Attributes** list, click **Remove All Items**.

7. Click **Finish**.

Note: For information on configuring attributes, see the **WorkView | Case Manager** module reference guide.

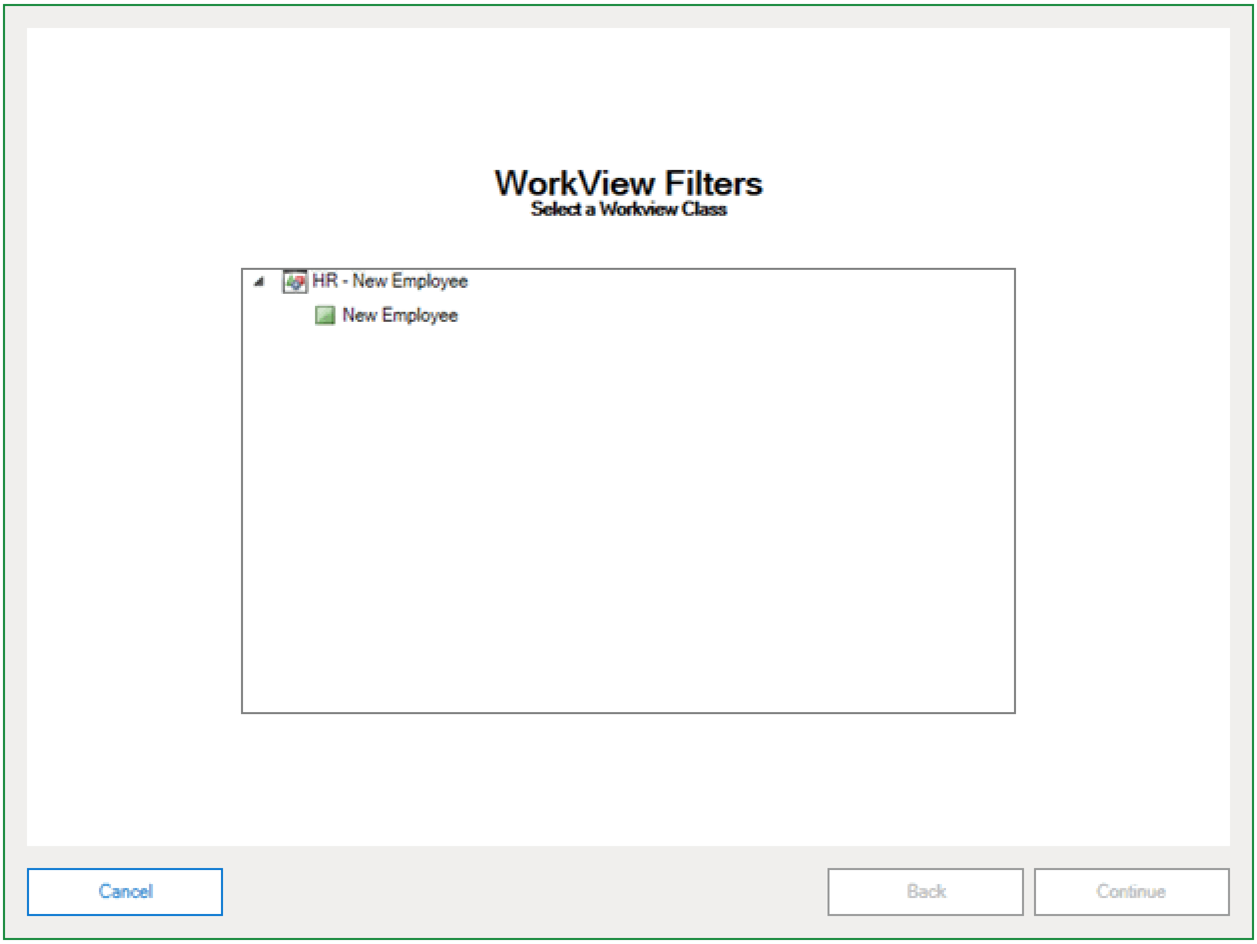
Configuring WorkView Filter Placeholders

In the **Create New** drop-down list, **WorkView Filter** inserts data from a WorkView filter into a table.

Note: You must be licensed for WorkView in order to access filters. The WorkView database tables must have also been created. See the **WorkView | Case Manager** module reference guide for more information.

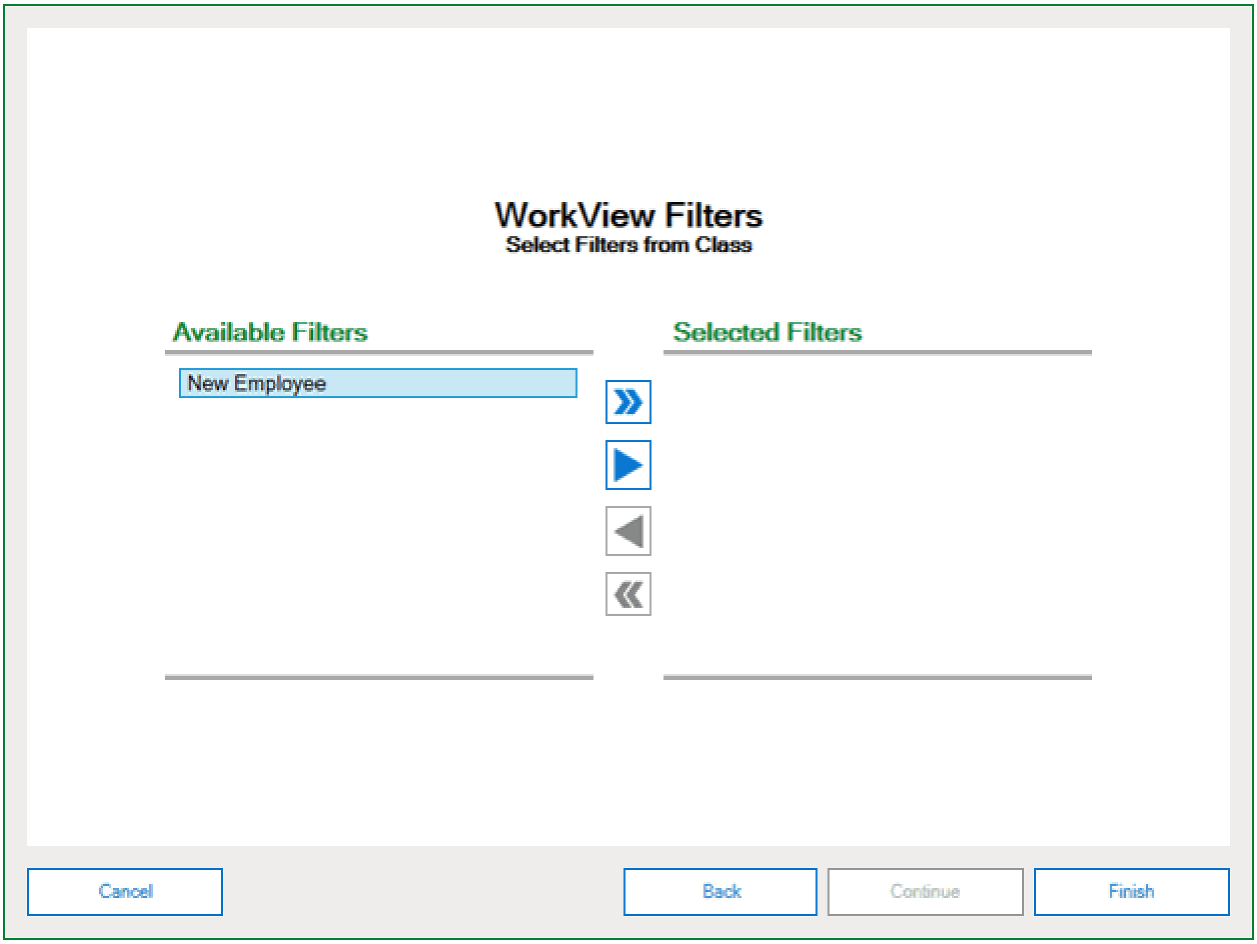
To create a WorkView Filter placeholder:

1. From the **Create New** drop-down list, select **WorkView Filter**.
2. The **WorkView Filters** dialog box to select a Class is displayed.

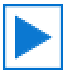


3. Use the tree structure to expand an application and select a WorkView Class
4. Click **Continue**.

5. The **WorkView Filters** dialog box to select filters is displayed.



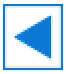
6. From the **Available Filters** list, select a filter or hold **Ctrl** to select multiple filters.
   a. To add filters to the **Selected Filters** list, double-click a single filter or click **Add Selected Items**.

   To add all available filters to the **Selected Filters** list, click **Add All Items**.

   b. To remove filter from the **Selected Filters** list, select a filter or hold **Ctrl** to select multiple filters. Double-click a single filter or click **Remove Selected Items**.

To remove all available filters from the **Selected Filters** list, click **Remove All Items**.

7. Click **Finish**.

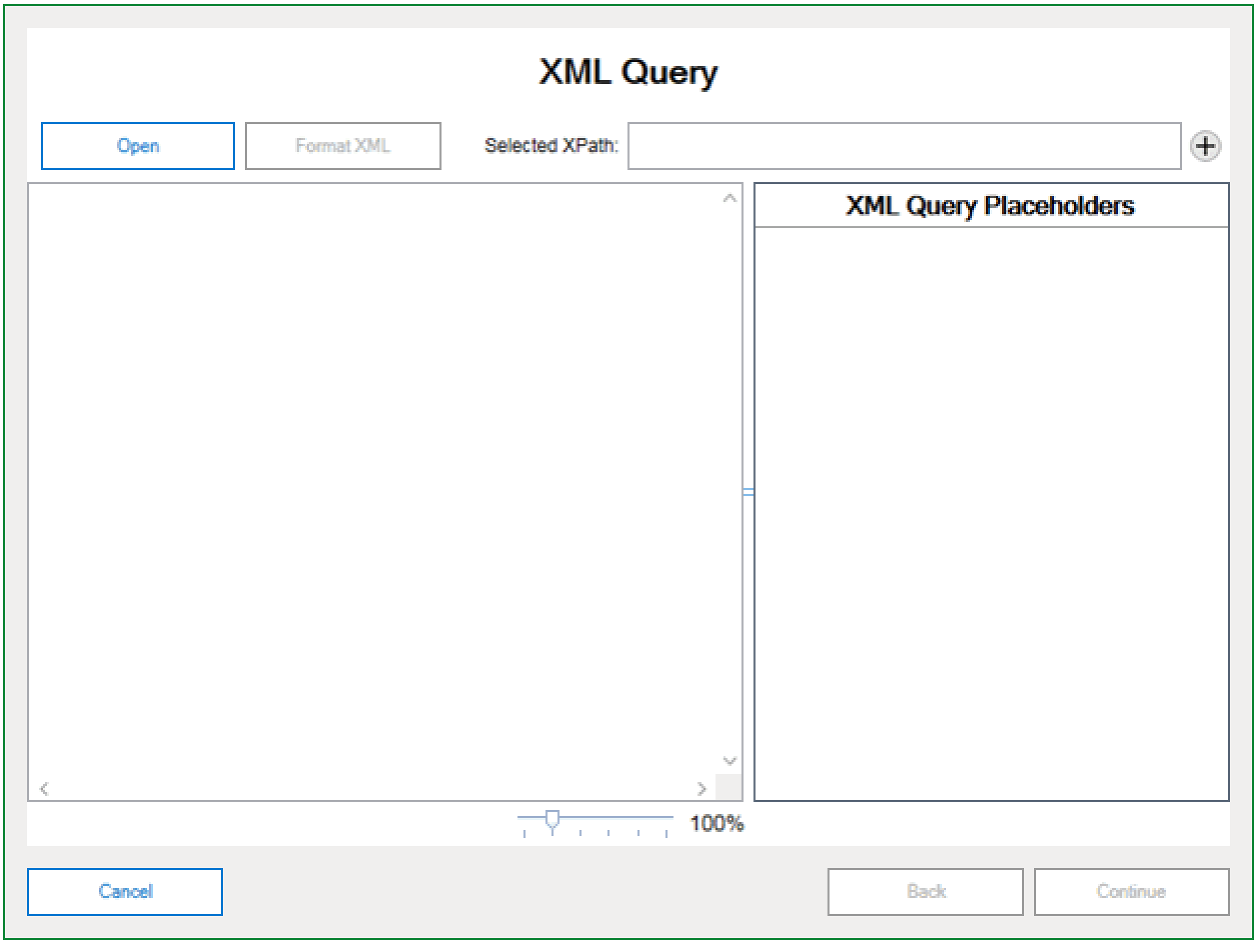
Note: For information on configuring filters, see the **WorkView | Case Manager** module reference guide.

Configuring XML Query Placeholders

In the **Create New** drop-down list, **XML Query** inserts a text or image value from an XML string. Use XML to pass in values through the OnBase API.

To create an XML Query Placeholder:

1. From the **Create New** drop-down list, select **XML Query**.
2. The **XML Query** dialog box is displayed.

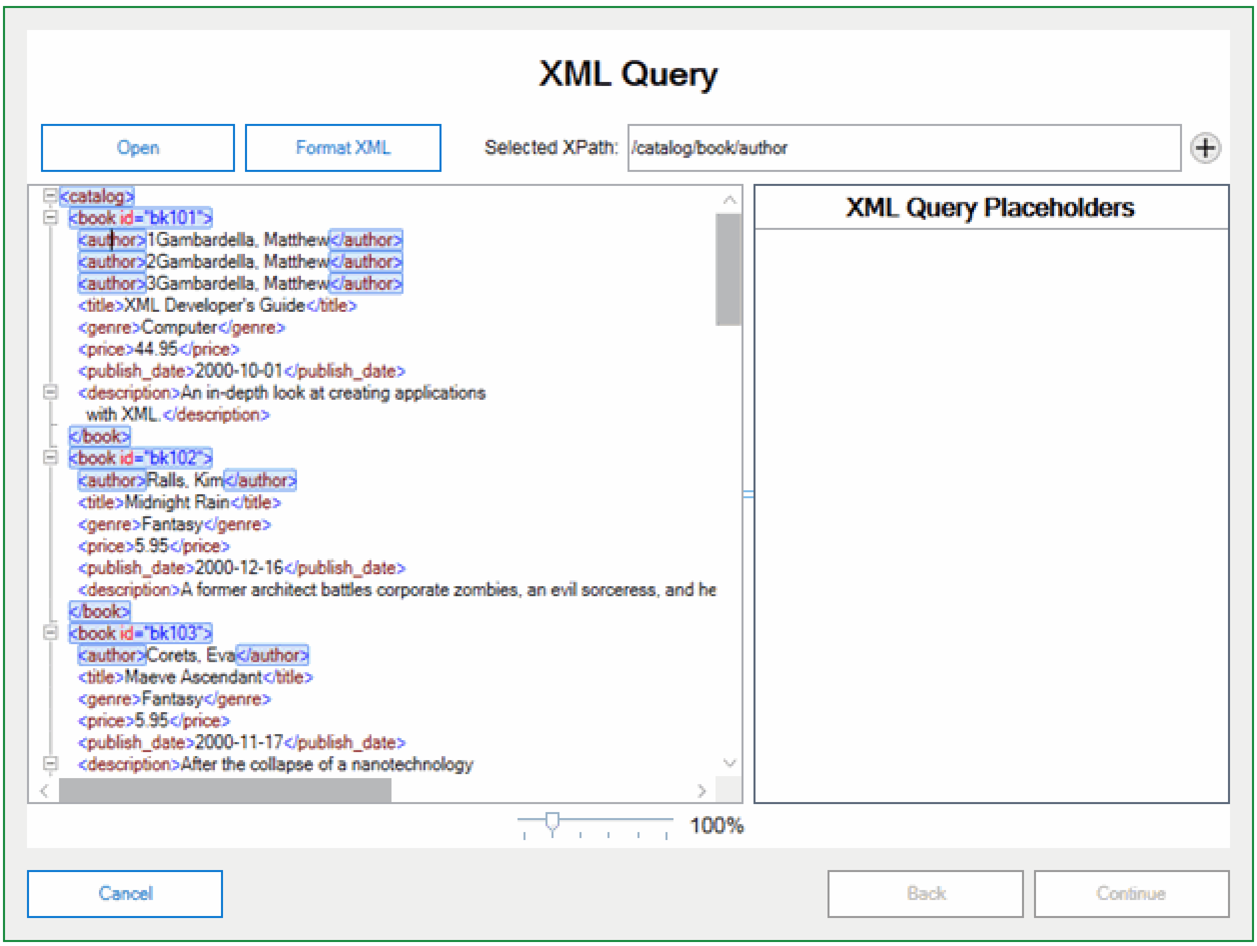


3. Enter the XPath in the **Selected XPath** field using one of the following methods:
   - Type the XPath in the **Selected XPath** field. For example, **/data/listdata** or **/data/rowdata**. Skip to step 5.
   -

Note: The initial **/** in the XPath is required if the root node is not specified first in the XPath.

Note: If the XPath contains internal " " (quotation marks), the XPath must be entered into the **Selected XPath** field manually.

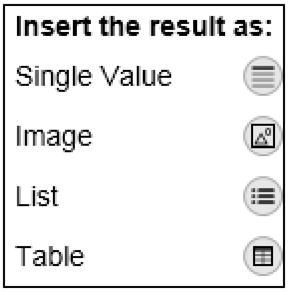
   - Click **Open** to select an XPath from an XML file. Continue to step 4.
4. Select an XML element or attribute from the XML file content pane. The **Selected XPath** field is populated.



If the XML file content is not displayed properly, click **Format XML**.

5. Click **Add to XML placeholder list**.

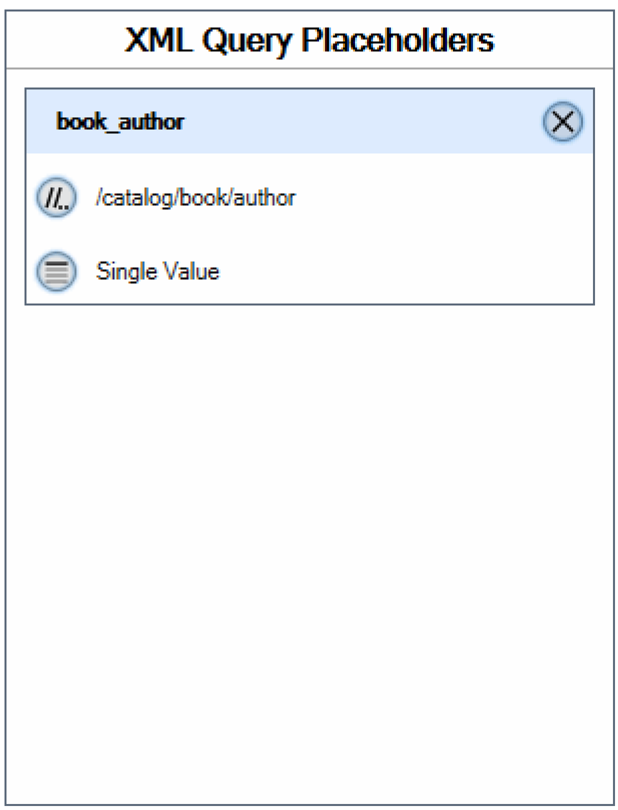
6. The **Insert the result as** drop-down list is displayed.



7. Select one of the following options to determine how the results of your query should be displayed:
   - **Single Value** - Select to insert the first value returned by the XPath query on the document.
   - **Image** - Select to insert the results of the query as an image. The results of the query must be encoded using Base64 encoding and must be an image format that can be inserted into a Word document.
   - **List** - Select to insert the results of the query as a list. All content from the top level nodes returned by the XPath query is inserted as a list embedded on the document. This Placeholder appears on the document like other Placeholders. Any list formatting that is applied to the Placeholder is used after the document is created and the values are inserted in the list.

Note: Outline formatting is not supported.

   - **Table** - Select to insert all the values retrieved by the XPath query as a table embedded on the document. Instances of this Placeholder appear on the document as an empty table. Any column headers entered in the top row of this table are preserved when the values are filled in. Table styles are also preserved.
8. The selected XPath is displayed in the **XML Query Placeholders** list.



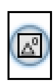
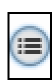
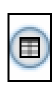
To remove the selected XPath from the XML Query Placeholders list, click **Delete**.

9. If necessary, click **Edit XPath** to edit the selected XPath.

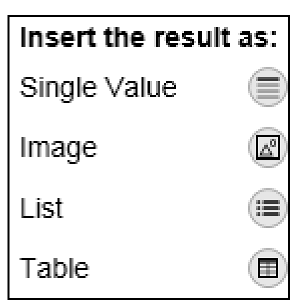
   a. Edit the XPath in the **Selected XPath** field.
   b. Click **Accept** to accept the changes.

   Click **Cancel** to cancel the changes.

10. If necessary, click **Edit Output Style** to edit the select XPath output style.
   a. Depending on the previously selected output style, **Edit Output Style** will appear as one of the following:

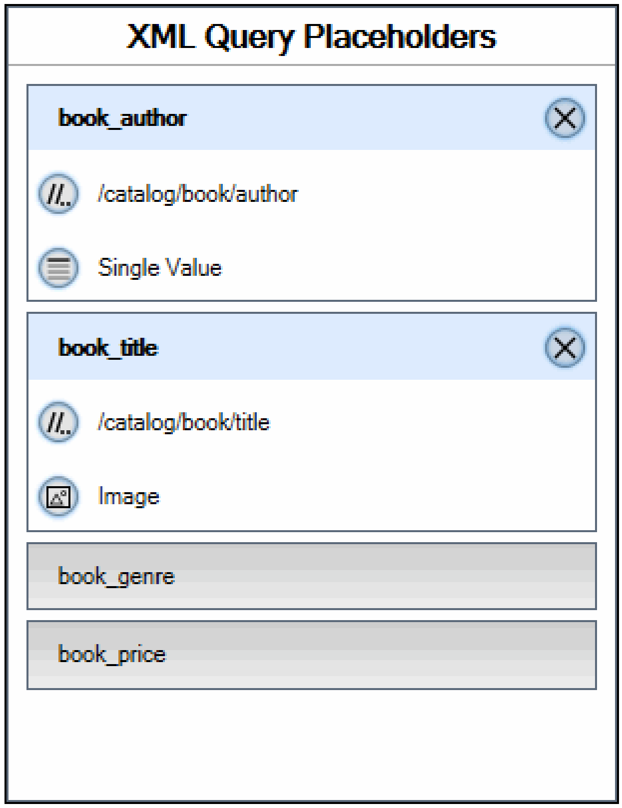
Icon	Output Style
	Single Value
	Image
	List
	Table

   b. The **Insert the result as** drop-down list is displayed.

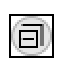


   c. Select an output style.
11. Repeat steps 3 through 10 to create additional XML Query Placeholders.

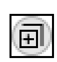
12. In the **XML Query Placeholders** list, click the blue bar to collapse a selected XPath. Click the gray bar to expand a selected XPath.



To collapse all selected XPaths, click **Collapse All**.

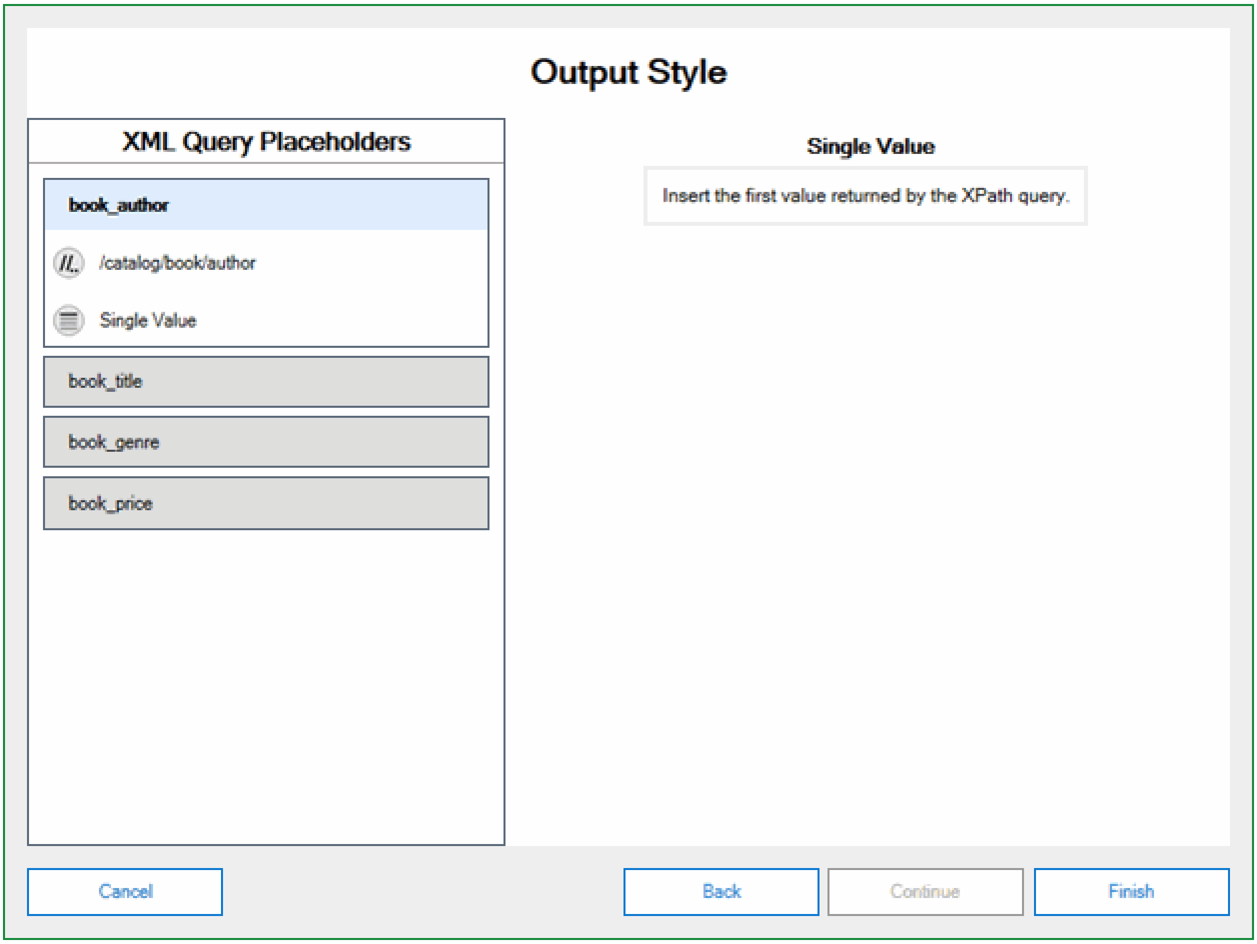


To expand all selected XPaths, click **Expand All**.



13. Click **Continue**.

14. The **Output Style** dialog box is displayed.



15. Click each selected XPath to view an output style summary and configure any additional settings.
    - **Single Value** has no additional settings.
    - **Image** has no additional settings.
    - **List** - If the XPath query result includes a delimiter, type this delimiter in the **Delimiter (Optional)** field.

      For example, if the delimiter is a comma, the XML should be structured as follows:

      ```
      <data><listdata>rowdata1,rowdata2,rowdata3</listdata><data>
      ```

      If the XPath query result does not include a delimiter, row data must be supplied as individual elements. For example:

      ```
      <data><listdata>rowdata1</listdata><listdata>rowdata2</
      listdata><listdata>rowdata3</listdata></data>
      ```

Note: Outline formatting is not supported.

- **Table** - In the **Column Names** field, specify column names as a comma delimited list. These columns should be child or descendant elements to row elements. For example, **column1,column2,column3**. In this example, the XML would be structured as follows:

  ```
  <data><rowdata><column1>data1</column1><column2>data2</
  column2><column3>data3</column3></rowdata></data>
  ```

  When inserting values as a table, elements that are not included in the columns specified in the **Column Names field** are ignored. If a column is not found in a particular row, an empty cell is inserted. If necessary, columns can also be reordered.

16. Click **Finish**.

Inserting Placeholders

Placeholders can be inserted into a template as a new blank Placeholder or from an existing Placeholder.

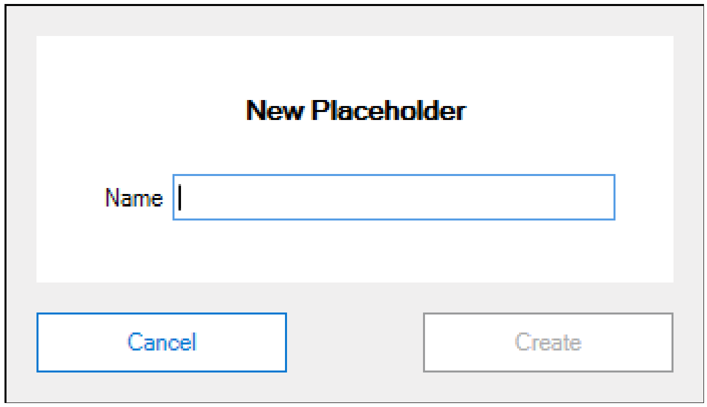
Inserting Blank Placeholders

Blank Placeholders are unconfigured upon creation and are listed under **Unconfigured** in the **Placeholder** pane. Unconfigured Placeholders are placed on every document that uses the specified template. For testing purposes, Unconfigured Placeholders can be set to a default value.

To insert a new blank Placeholder into a template:

1. Place the cursor where the Placeholder should be inserted.
2. On the **Template Builder** ribbon, click **Insert Blank**.

3. The **New Placeholder** dialog box is displayed. Type a name for the placeholder in the **Name** field, and click **Create**.

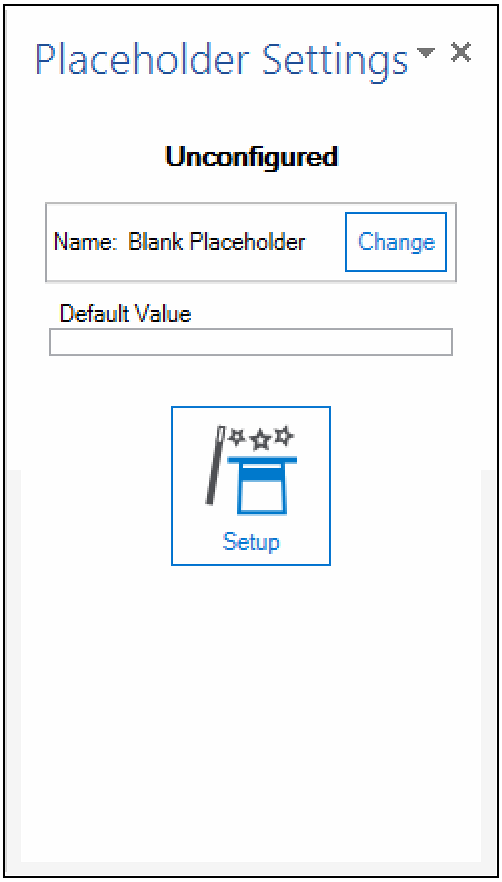


Note the following:

- This field is limited to 80 characters.
- Each placeholder name within the same template must be unique.
- The following characters should not be used in the name of a placeholder that is used in a SQL query: & (ampersand), " " (quotation marks), ' ' (single quotes), < > (carats). When a Placeholder name contains any of these characters and is used in a SQL query, no data is returned for that query.

4. The Unconfigured Placeholder is inserted into the template as: `{[Placeholder Name]}`

5. The **Placeholder Settings** pane is displayed.



6. To change the name of the Placeholder, click **Change** and type a new name in the **Placeholder Name** dialog box.
7. To set a default value for the Placeholder, type the value in the **Default Value** field.

Note: Unconfigured Placeholders with a Default Value should only be used for testing.

8. Click **Save Template**.

Configuring Blank Placeholders

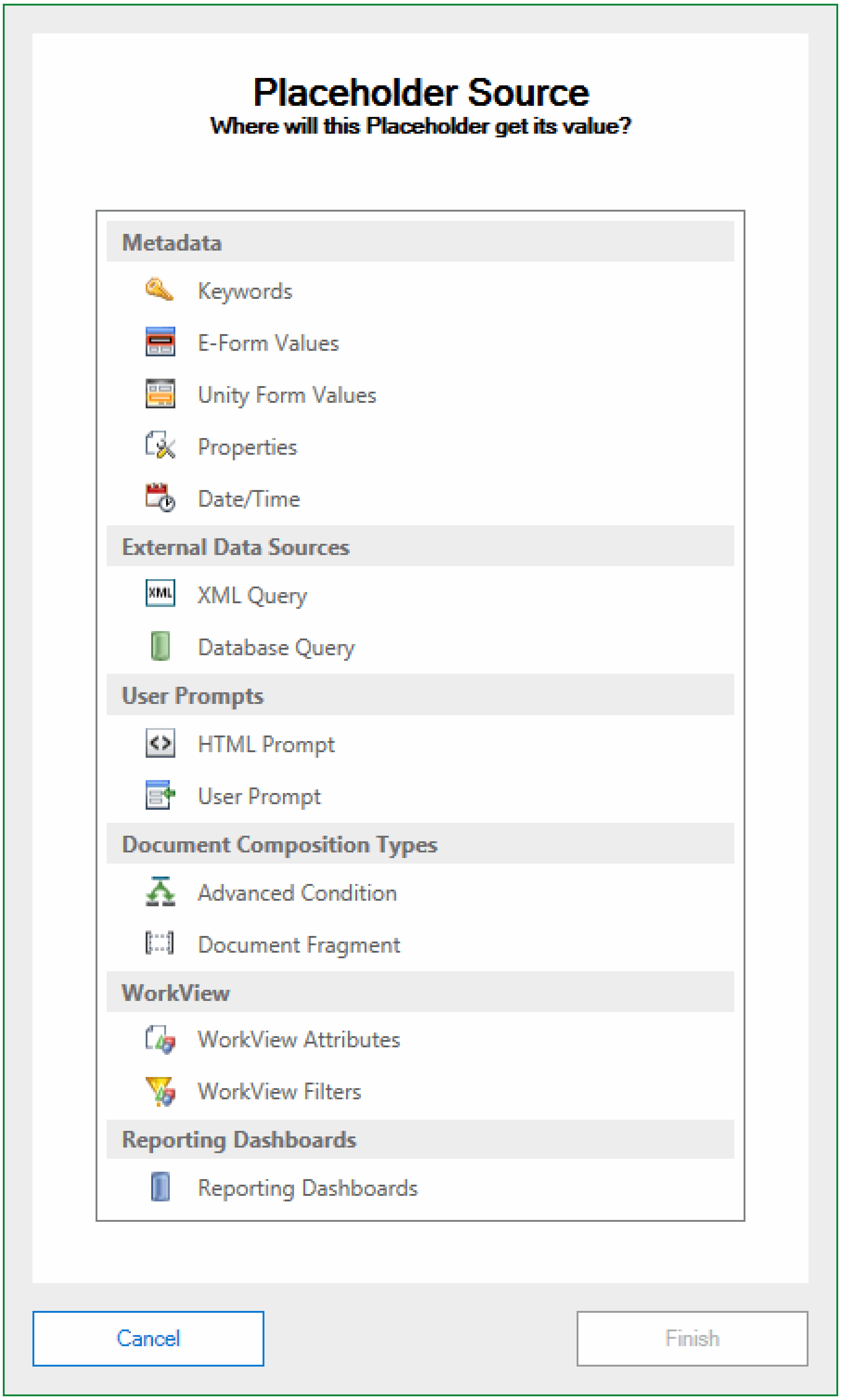
After a blank Placeholder has been inserted, it can be configured as a Placeholder type.

To configure an existing Unconfigured Placeholder:

1. On the **Placeholder** pane, expand **Unconfigured** and select the Unconfigured Placeholder.
2. Click **Edit**.

3. Click **Setup**.

4. The **Placeholder Source** dialog box is displayed.



5. Select a Placeholder source.

Note: The Placeholder source of Unconfigured Placeholders cannot be changed once it has been selected. To use a different Placeholder source, insert a new blank Placeholder.

a. **Metadata** - Includes Placeholder types Keywords, E-Form Values, Unity Form Values, Properties, and Date/Time. Select from the following:
   - **Keywords** - Select a Document Type from the **Filter by Document Type** drop-down list, select a Keyword Type from the **Keyword Type** drop-down list, and click **Continue**. For more information, see Configuring Keywords Placeholders on page 163.
   - **E-Form Values** - Type the E-Form field name in the **Enter the E-Form field name** field, and click **Continue**. For more information, see Configuring E-Form Value Placeholders on page 158.
   - **Unity Form Values** - Select a Unity Form from the **Filter Unity Forms** drop-down list, select a field from the **Unity Form Field** drop-down list, and click **Continue**. For more information, see Configuring Unity Forms Placeholders on page 171.

Note: If you are not licensed for Unity Forms, only E-Form values are available.

   - **Properties** - Select to choose **Document Property** or **User Property**.

     Document Property - Select a Document Property from the **Document Properties** drop-down list, and click **Continue**. For more information, see Configuring Properties Placeholders on page 165.

     User Property - Select a User Property from the **User Properties** drop-down list, and click **Continue**. For more information, see Configuring Properties Placeholders on page 165.
   - **Date/Time** - Select for Placeholder type Date/Time. For more information, see Configuring Date/Time Placeholders on page 157.

b. **External Data Source** - Includes Placeholder types XML Query and Database Query. Select from the following:
   - **XML Query** - Type the XPath in the **Enter XPath** field, and click **Continue**. Select an output style. For more information, see Configuring XML Query Placeholders on page 180.
   - **Database Query** - Use the **Choose a Query** tree structure to select an existing query or click **New Query** to create a new query, and click **Continue**. Select an output style. For more information, see Configuring Database Query Placeholders on page 150.

c. **User Prompts** - Includes Placeholder types HTML Prompt and User Prompt. Select from the following:
   - **HTML Prompt** - Select an E-Form from the **Choose an E-Form** drop-down list, type the field name or select a field name from the **Enter the Field name** drop-down list, and click **Continue**. For more information, see Configuring HTML Prompt Placeholders on page 161.
   - **User Prompt** - Type the User Prompt text in the **Enter the Prompt Question** field, and click **Continue**. For more information, see Configuring User Prompt

Placeholders on page 173.

d. **Document Composition Types** - Includes Placeholder types Advanced Condition and Document Fragment. Select from the following:
   - **Advanced Condition** - Select for Placeholder type Advanced Condition. For more information, see Configuring Advanced Condition Placeholders on page 135.
   - **Document Fragment** - Select for Placeholder type Fragment. For more information, see Configuring Document Fragment Placeholders on page 159.

e. **WorkView** - Includes Placeholder types WorkView Attributes and WorkView Filters. Select from the following:

Note: You must be licensed for WorkView in order to access attributes and filters. The WorkView database tables must have also been created. See the **WorkView | Case Manager** module reference guide for more information and for information on configuring attributes and filters.

   - **WorkView Attribute** - Use the tree structure to select an attribute, and click **Continue**. For more information, see Configuring WorkView Attributes Placeholders on page 174.

Note: The Document, Calculated, and Formatted Text WorkView attribute data types are not supported for use with Document Composition.

   - **WorkView Filter** - Use the tree structure to select a filter. Select **Use column names as headers** to use the column names of the filter as the table headers of the table created with the placeholder. Select **Constrain to parent** to limit filter results to return only objects sharing an attribute, property, or relationship with the source object. When this option is not selected, all results from the filter are returned. Click **Continue**. For more information, see Configuring WorkView Filter Placeholders on page 177.

f. **Reporting Dashboards** - Includes Placeholder type Reporting Dashboards. Select from the following:
   - **Reporting Dashboards** - Select a data provider from the **Reporting Dashboards Data Providers** drop-down list and click **Continue**. For more information, see Configuring Reporting Dashboards Placeholders on page 167.

6. Click **Finish**.
7. Click **Save Template**.

Inserting Existing Placeholders

After a Placeholder has been created, it can be inserted into a template.

To insert an existing Placeholder into a template:

1. Place the cursor where the Placeholder should be inserted.
2. On the **Placeholder** pane, expand a Placeholder type and select a Placeholder.
3. Click **Insert**.

4. The Placeholder is inserted into the template as:
   `{[Placeholder Name]}`

Note: Inserting Fragment Placeholders into tables is not supported.

5. Apply a font or style to the Placeholder, if necessary, using the Microsoft Word toolbar. Any fonts or styles used for the Placeholder will be used for the value that is inserted in the composed document. If no fonts or styles are applied to the Placeholder, the font and style will be inherited from the character prior to the Placeholder. If there are no characters prior to the Placeholder, the font and style will be inherited from the character following the Placeholder.
6. Click **Save Template**.

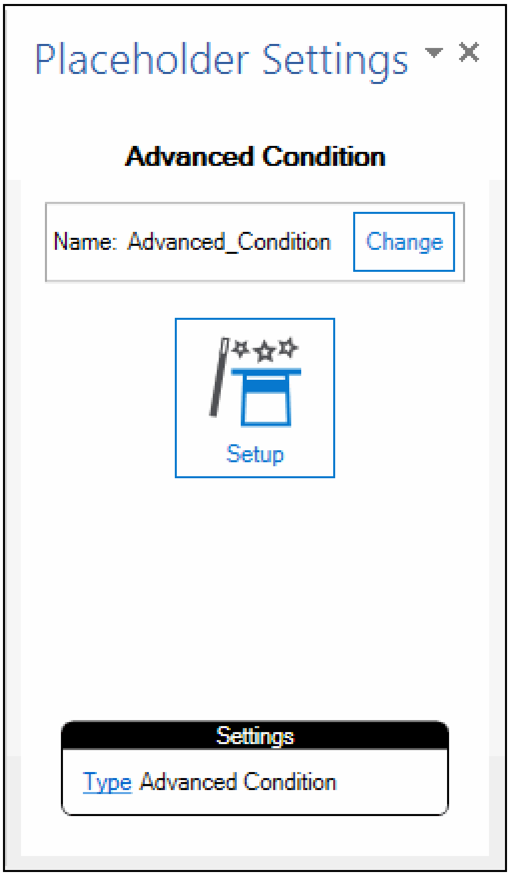
Editing Placeholders

Placeholders that have been created and configured can be edited.

To edit a Placeholder:

1. If the Placeholder has already been added to the template, click the Placeholder, and skip to step 6.
2. If the Placeholder has not yet been added to the template, on the **Placeholder** pane, expand the Placeholder type and select the Placeholder.
3. Click **Edit**.

4. The **Placeholder Settings** pane is displayed.



5. To change the name of the Placeholder, click **Change** and type a new name in the **Placeholder Name** dialog box.

6. On the **Placeholder Settings** pane, click **Setup** to edit all settings, or click the appropriate hyperlink in the **Settings** section to edit the following settings:

Hyperlink	Description
Type	Click to edit the Placeholder’s type. See Creating Placeholders on page 133 for more information on Placeholder types.
Value	Click to edit the Placeholder’s value. For Fragment Placeholders, **Match destination style** is also available. See Creating Placeholders on page 133 for more information on Placeholder values.
Editable	Click to edit the restrictions for editing the Placeholder during preview. **Note:** The **Editable** hyperlink is only available when **Restrict Edit Preview Settings to Select Placeholder Values** is selected on the **General Settings** dialog box from the **Template Options** pane. For more information, see Configuring Edit During Preview on page 196.
Formatting	Click to edit the Placeholder’s formatting. See Configuring Display Style on page 198 for more information on Placeholder formatting.
Case	Click to edit the Placeholder’s case. See Configuring Case Correction on page 205 for more information on Placeholder case.
Output	Click to edit the Placeholder’s output. See Configuring Keyword Mapping on page 206 for more information on Placeholder output.
Query	Click to edit the Placeholder’s database query. See Configuring Database Query Placeholders on page 150 for more information on Database Query Placeholders.
Filter	Click to edit the filter of a WorkView Filter Placeholder. See Configuring WorkView Filter Placeholders on page 177 for more information on WorkView Filter Placeholders.
XPath	Click to edit the XPath of an XML Query Placeholder. See Configuring XML Query Placeholders on page 180 for more information on XML Query Placeholders.

Hyperlink	Description
Style	Click to edit the way the Placeholder's database query, filter, or XPath query results will be displayed. For more information on configuring Placeholder value Style, see Configuring Database Query Placeholders on page 150, Configuring WorkView Filter Placeholders on page 177, and Configuring XML Query Placeholders on page 180.
Required	Click to set whether the Placeholder is required. A required Placeholder must be populated in order for composition to complete. For more information, see Configuring Required Placeholders on page 209.

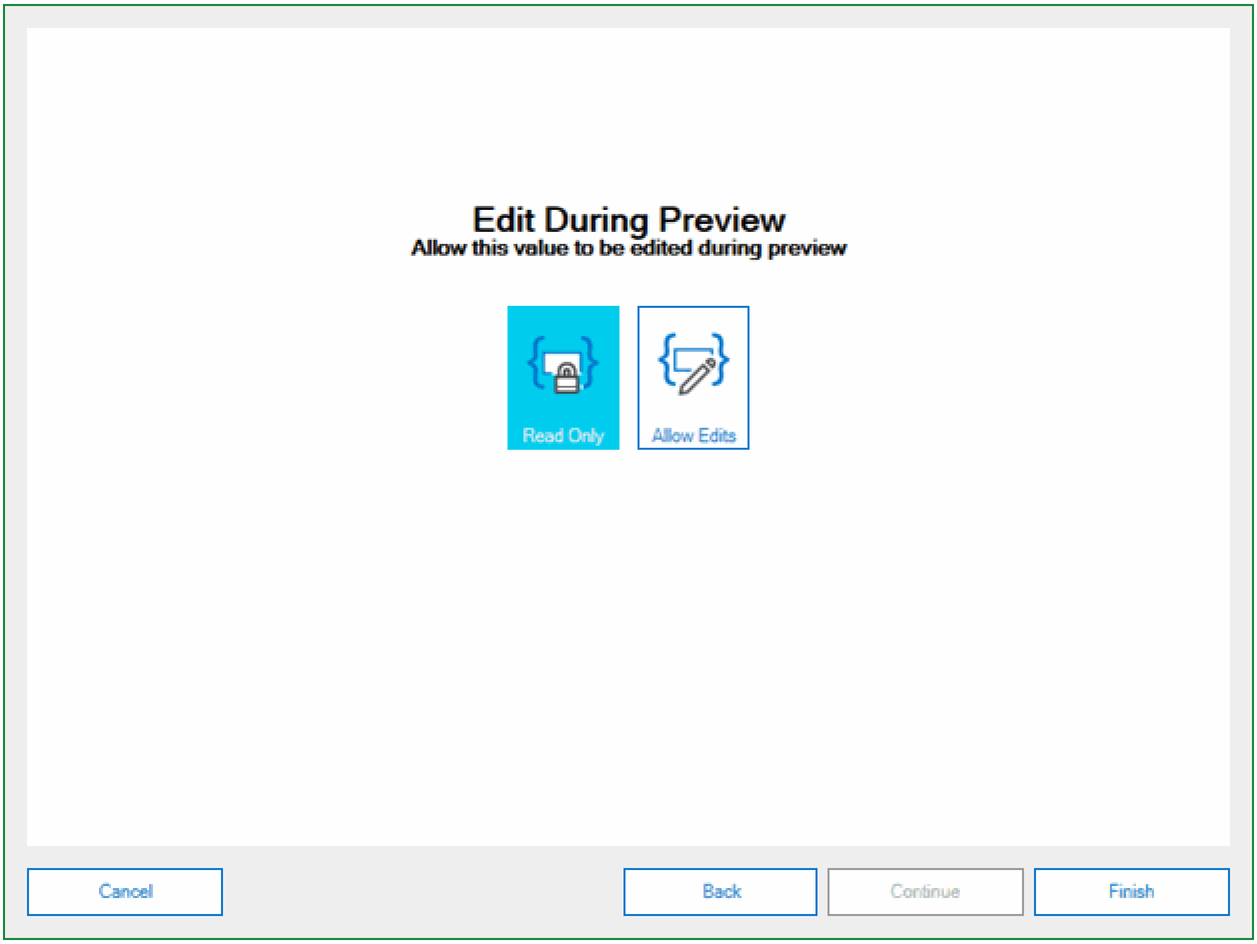
Note: The available hyperlinks depend on the type of Placeholder being edited.

7. If the Placeholder being edited is an XML Query with output style **Insert the results as a table**, the **Keygroup Mapping** dialog box is displayed. See Configuring Keygroup Mapping on page 207 for more information on Keygroup mapping.
8. Click **Finish**.
9. Click **Conditions** to edit any configured conditions, or create a new condition. For more information on configuring conditions, see Configuring Conditions on page 210.
10. Click **Save Template**.

Configuring Edit During Preview

When **Restrict Edit Preview Settings to Select Placeholder Values** is selected on the **General Settings** dialog box from the **Template Options** pane, editing Placeholder values during preview can be restricted on the **Edit During Preview** dialog box.

The **Edit During Preview** dialog box is accessed through the **Setup** button or the **Editable** hyperlink on the **Placeholder Settings** pane of a selected Placeholder.



To configure editing a Placeholder during preview:

1. On the **Edit During Preview** dialog box, select one of the following options:

Option	Description
Read Only	Select to allow users to view, but not edit the Placeholder value during preview.
Allow Edits	Select to allow users to edit the Placeholder value during preview.

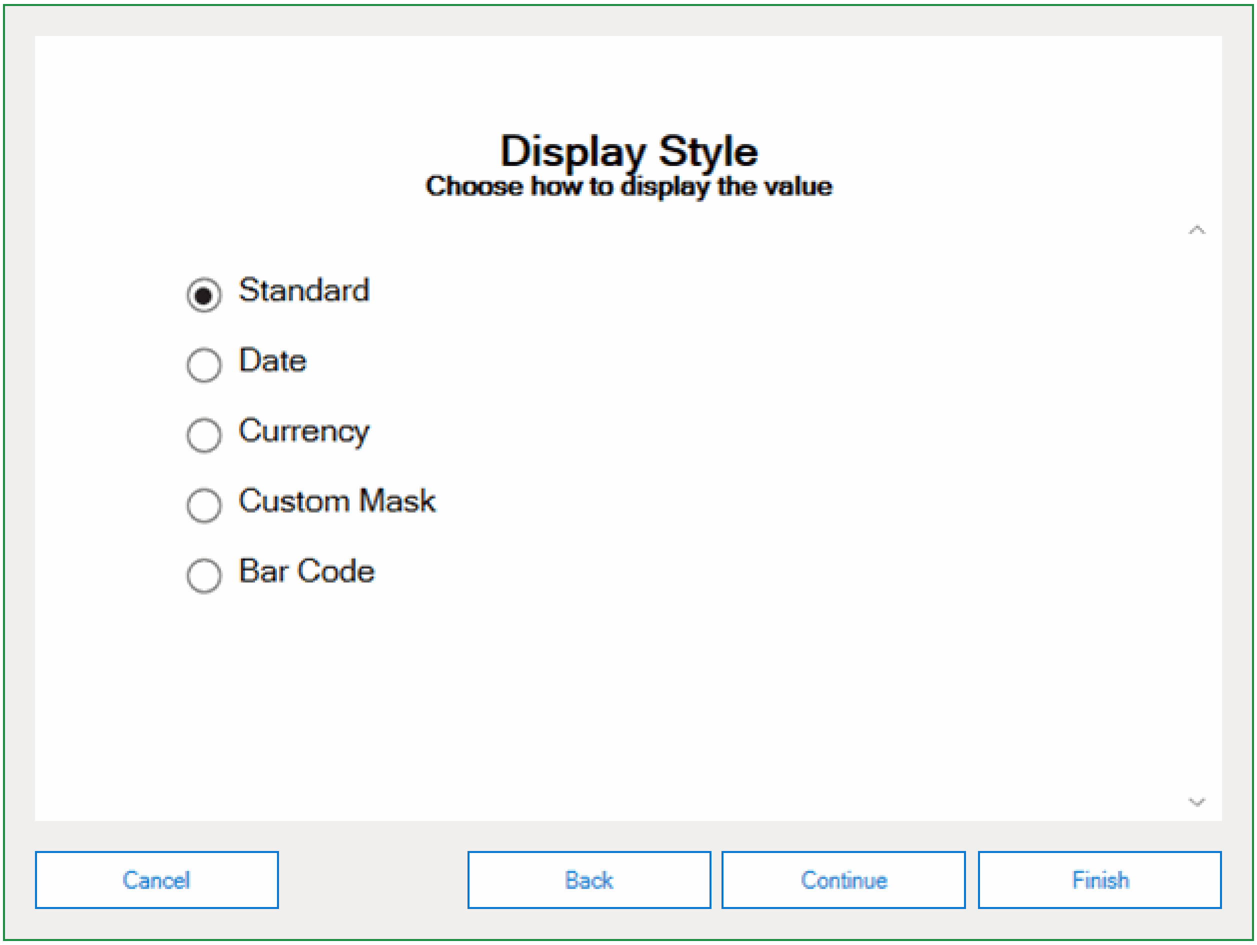
2. Click **Finish**.
3. Click **Save Template**.

Configuring Display Style

Placeholder values can be configured to display with specific formatting. Placeholder value formatting is configured for the following Placeholder types on the **Display Style** dialog box:

- E-Form Value
- HTML Prompt
- Keyword
- Properties
- Reporting Dashboards
- Unity Forms
- User Prompts
- WorkView Attributes
- Database Query with **Insert the first result of a single Column** output style
- XML Query and Nested XML Query with **Single Value** output style

The **Display Style** dialog box is accessed through the **Setup** button or the **Formatting** hyperlink on the **Placeholder Settings** pane of a selected Placeholder.



To configure display style options from the **Display Style** dialog box, see the following:

- Standard Display Style on page 199
- Date Display Style on page 199
- Currency Display Style on page 202
- Custom Mask Display Style on page 203
- Bar Code Display Style on page 204

Standard Display Style

Standard display style applies no formatting to the Placeholder value.

To configure Standard display style:

1. On the **Display Style** dialog box, select **Standard**.
2. Click **Finish**.
3. Click **Save Template**.

Date Display Style

Date display style applies a date/time format to the Placeholder value.

To configure Date display style:

1. On the **Display Style** dialog box, select **Date**.
2. Select a date format from the **Please Select a Date Format** drop-down list:
    - **<Custom>** - The date/time in a new date/time format. For configuration of custom date formats, see Custom Date Display Style on page 200.
    - **Short Date** - The date in **M/d/yyyy** format. For example, 1/23/2016.
    - **Long Date** - The date in **dddd, MMMM d, yyyy** format. For example, Saturday, January 23, 2016.
    - **Time** - The time in **h:mm tt** format. For example, 4:56 PM.
    - **General Date/Time** - The date and time in **M/d/yyyy h:mm t** format. For example, 1/23/2016 4:56 PM.
    - **Full Date/Time** - The date in **dddd, MMMM d, yyyy h:mm t** format. For example, Saturday, January 23, 2016 4:56 PM.
    - **Month and Day** - The date in **MMMM d** format. For example, January 23.
    - **Month and Year** - The date in **MMMM, yyyy** format. For example, January, 2016.

Note: Any existing custom date formats are displayed at the bottom of the **Please Select a Date Format** drop-down list, and can be removed by hovering and clicking **Remove** on the right side of the custom date format name.

3. Click the **set input format** hyperlink to specify the format of the input value from which the Placeholder value is populated.

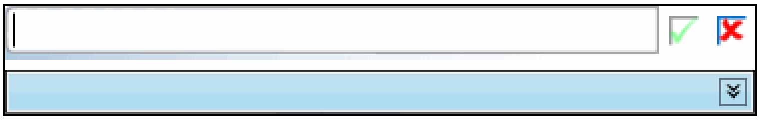
4. Select a date format as described in step 2. Select **<None>** if users will enter varied date/time formats. OnBase will interpret the format.

Tip: Unless a specific date/time format is used for every input, selecting **<None>** is recommended. The formatting will fail if the date/time is not entered in the specified format.

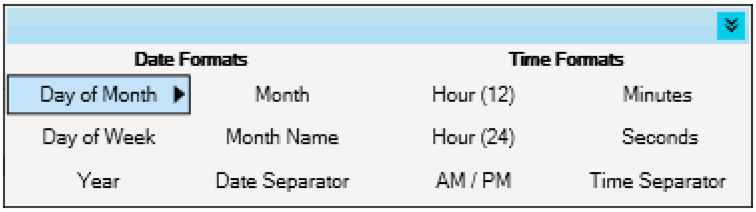
5. Click **Finish**.
6. Click **Save Template**.

Custom Date Display Style

1. On the **Display Style** dialog box, select **Date**.
2. Select **<Custom>** from the **Please Select a Date Format** drop-down list.
3. The custom date format field is displayed.



4. Type a date format or click **Show/Hide Date Format Tools** to select components from the date format tools drop-down.



Note: At least two characters must be entered for any **<Custom>** format. Custom date formats use standard date and time strings. For more information, see Custom Date and Time Format Strings on the Microsoft MSDN site.

a. Click a format component to insert the corresponding formatting in the custom date format field or expand additional options, if available.

Date Formats	Description
Day of Month	Select to expand the following: • **Day of Month (1-31)** - Inserts **d** • **Day of Month (01-31)** - Inserts **dd**
Day of Week	Select to expand the following: • **Day of Week** - Inserts **dddd** • **Abbreviated Day of Week** - Inserts **ddd**
Year	Select to expand the following: • **Two Digit Year** - Inserts **yy** • **Four Digit Year** - Inserts **yyyy**
Month	Select to expand the following: • **Month (1-12)** - Inserts **M** • **Month (01-12)** - Inserts **MM**
Month Name	Select to expand the following: • **Month Name** - Inserts **MMMM** • **Abbreviated Month Name** - Inserts **MMM**
Date Separator	Inserts **/**

Time Formats	Description
Hour (12)	Select to expand the following: • **Hour (1-12)** - Inserts **h** • **Hour (01-12)** - Inserts **hh**

Time Formats	Description
Hour (24)	Select to expand the following: • **Hour (0-23)** - Inserts **H** • **Hour (00-23)** - Inserts **HH**
AM/PM	Inserts **tt**
Minutes	Inserts **mm**
Seconds	Inserts **ss**
Time Separator	Inserts **:**

Tip: When the cursor is placed in the custom date format field, a preview of the custom date format is populated on the blue bar below the field.

Note: Spaces and characters that are not used as format specifiers can be inserted between format components. This excludes the characters inserted by the date format tools components, as well as **f**, **F**, **g**, **K**, **z**, and **%**. Any character can be inserted when it is enclosed in a pair of ' or ". For example, **'M'** or **"M"**. For more information, see Custom Date and Time Format Strings on the Microsoft MSDN site.

5. Click **OK** to save, or click **Cancel** to return to the **Display Style** dialog box.

Currency Display Style

Currency display style applies a currency format to the Placeholder value.

To configure Currency display style:

1. On the **Display Style** dialog box, select **Currency**.
2. Select a currency format from the **-None-** drop-down list, which include **US Currency** and any configured Currency data type Keyword Types.

Note: A currency format other than **-None-** must be selected.

Note: For more information on creating and configuring currency formats, see the System Administration help file or module reference guide.

3. Click the **set input format** hyperlink to specify the format of the input value from which the Placeholder value is populated.
4. Select a currency format as described in step 2. Select **-None-** if users will enter varied currency formats. OnBase will interpret the format.

Tip: Unless a specific currency format is used for every input, selecting **-None-** is recommended. The formatting will fail if the value is not entered in the specified format.

5. Click **Finish**.
6. Click **Save Template**.

Custom Mask Display Style

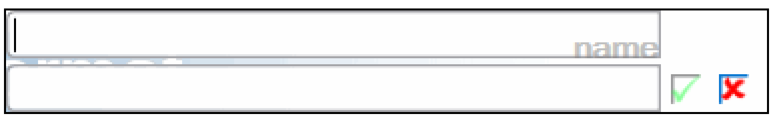
Custom Mask display style applies a custom mask format to the Placeholder value.

To configure Custom Mask display style:

1. On the **Display Style** dialog box, select **Custom Mask**.
2. From the **Please Select a Mask Format** drop-down list, select a mask format or select **<Create New Mask>** to create a new mask format.

   To create a new mask format:

   a. From the **Please Select a Mask Format** drop-down list, select **<Create New Mask>**.
   b. The **name** field and custom mask format field are displayed.

   c. Type a name for the custom mask format in the **name** field.
   d. Type a mask format, using a space where input characters are placed. Typed spaces are displayed as a light gray x.
   e. Click **OK** to save, or click **Cancel** to return to the **Display Style** dialog box.

Note: The **Ignore Punctuation** option is no longer used.

   f. To edit the custom mask format, click **Edit Mask**.

Note: Any existing custom mask formats are displayed at the bottom of the **Please Select a Mask Format** drop-down list, and can be removed by hovering and clicking **Remove** on the right side of the custom mask format name.

Note: Custom Masks can only be deleted by users that are licensed for Document Composition and have Document Composition Administration privileges.

3. Click **Finish**.
4. Click **Save Template**.

Bar Code Display Style

Bar Code display style applies a bar code format to the Placeholder value. This allows Placeholder values to be displayed as bar code images.

Note: It is considered a best practice to familiarize yourself with a bar code standard before using it as a display format. For example, ensure the selected bar code type is compatible with potential Placeholder values. Each bar code type adheres to a specific character set.

To configure Bar Code display style:

1. On the **Display Style** dialog box, select **Bar Code**.
2. From the **Please select a Bar Code Format** drop-down list, select a bar code format from the following:
   - **Code 3 of 9**

Note: The following characters are valid for a Placeholder using the **Code 3 of 9** bar code Display Style: **A-Z**, **0-9**, **-**, **+**, **.**, **$**, **/**, **%**, and spaces. Invalid characters are removed from the Placeholder value when the template is composed.

   - **Code 128**
   - **Data Matrix**
   - **EAN-128**
   - **PDF417**
   - **QR code**

   When **Code 3 of 9**, **Code 128**, **EAN-128**, or **PDF417** is selected:

   a. Click **Continue**.
   b. Enter the appropriate **Width** and **Height** values for the bar code image in pixels. Values must be between 2 and 1,500.

      By default, **Auto** is displayed in these fields, indicating that the system determines the appropriate width and height at the time of composition.
   c. To prevent the Placeholder value from being displayed with the bar code, select **Hide Barcode Text**.

      By default, the Placeholder value is displayed with the bar code.

Note: The **Hide Bar Code Text** option does not apply to PDF417 bar codes. These bar codes do not have the option to include text.

   When **Data Matrix** or **QR code** is selected:

   a. Click **Continue**.
   b. Enter the appropriate **Height & Width** for the bar code image in pixels. The value must be between 2 and 1,500. The value is applied to both the width and height, as these bar code formats are square in shape.

      By default, **Auto** is displayed in this field, indicating that the system determines the appropriate width and height at the time of composition.

3. Click **Finish**.
4. Click **Save Template**.

Configuring Case Correction

Templates pull data from many different data sources, which may not store data consistently with regard to text case. To ensure consistency and readability, text case formatting options are available.

The **Case Correction** dialog box is accessed through the **Setup** button or the **Case** hyperlink on the **Placeholder Settings** pane of a selected Placeholder.

To configure case correction:

1. On the **Case Correction** dialog box, select one of the following options:

Option	Description
(no correction)	No case correction will be applied.

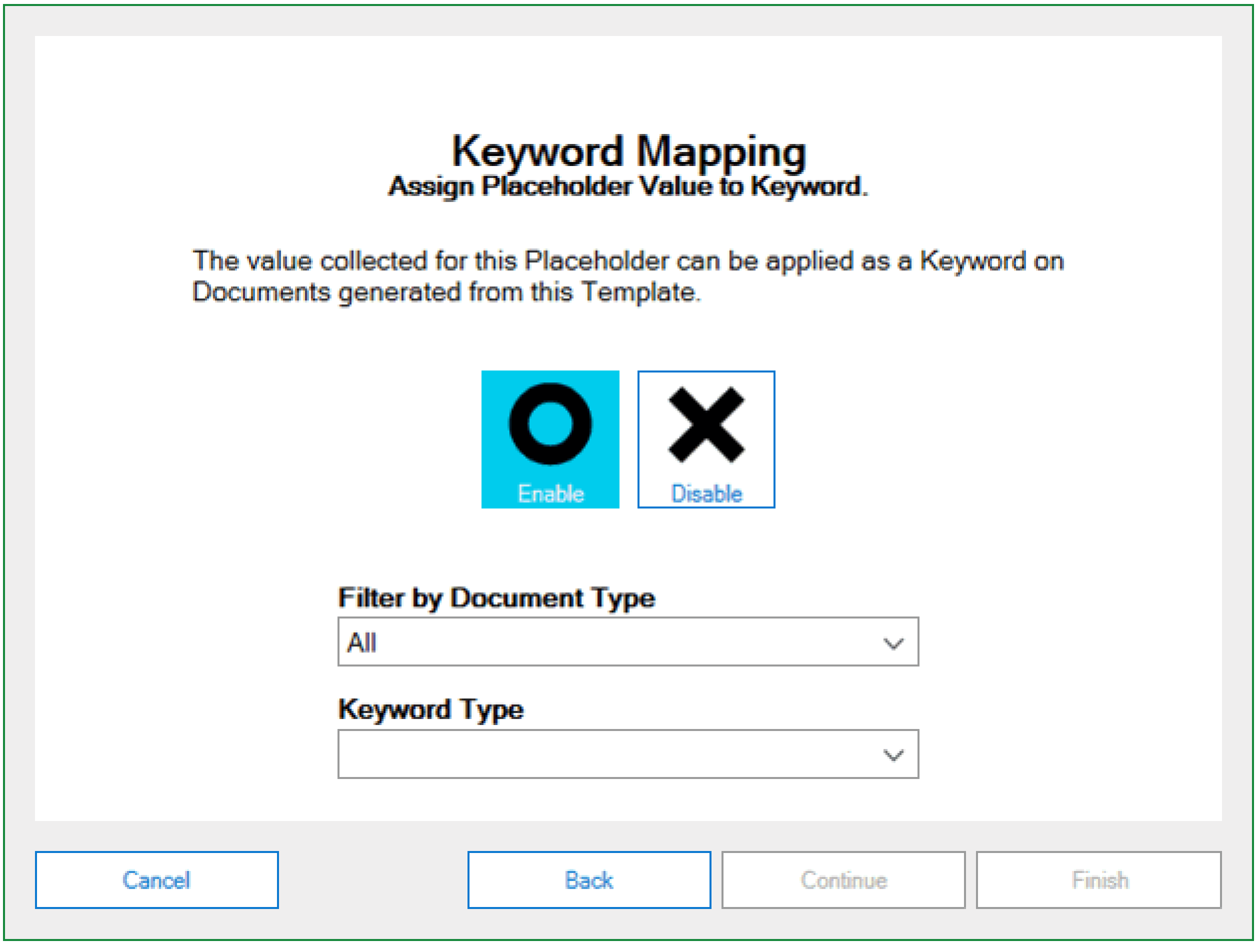
Option	Description
Proper Noun	Proper nouns will be capitalized.
lowercase	All text will be in all lower case letters.
UPPERCASE	All text will be in all upper case letters.

2. Click **Finish**.
3. Click **Save Template**.

Configuring Keyword Mapping

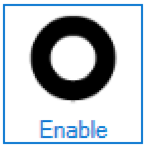
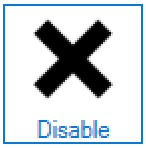
A Placeholder value can be used as a Keyword value on documents composed from a template by using Keyword Mapping.

The **Keyword Mapping** dialog box is accessed through the **Setup** button or the **Output** hyperlink on the **Placeholder Settings** pane of a selected Placeholder.



To configure case correction:

1. On the **Keyword Mapping** dialog box, select one of the following options:

Option	Description
Enable 	Click to assign the Placeholder value as a Keyword Value on the composed document. Select a Document Type from the **Filter by Document Type** drop-down list. Select a Keyword Type from the **Keyword Type** drop-down list. **Caution:** When mapping to a Keyword Type, ensure the configured data type and maximum length of the Keyword Type can accommodate incoming values. Values that do not match the data type of the Keyword Type are not added to the document. Values exceeding the maximum number of allowed characters are truncated.
Disable 	Click if you do not want to assign the Placeholder value as a Keyword Value on the composed document.

Caution: It is strongly recommended you do not map a value to a Keyword Type that is part of a Multi-Instance Keyword Type Group, especially when the import dialog is disabled for the template you are configuring. When mapping a value to a Keyword Type that is part of a Multi-Instance Keyword Type Group, and that Multi-Instance Keyword Type Group is contained in the Document Type used to archive composed documents, a separate instance of the Multi-Instance Keyword Type Group is created to contain the value when a document is composed (i.e., the value is not included as part of the initial Multi-Instance Keyword Type Group on the document).

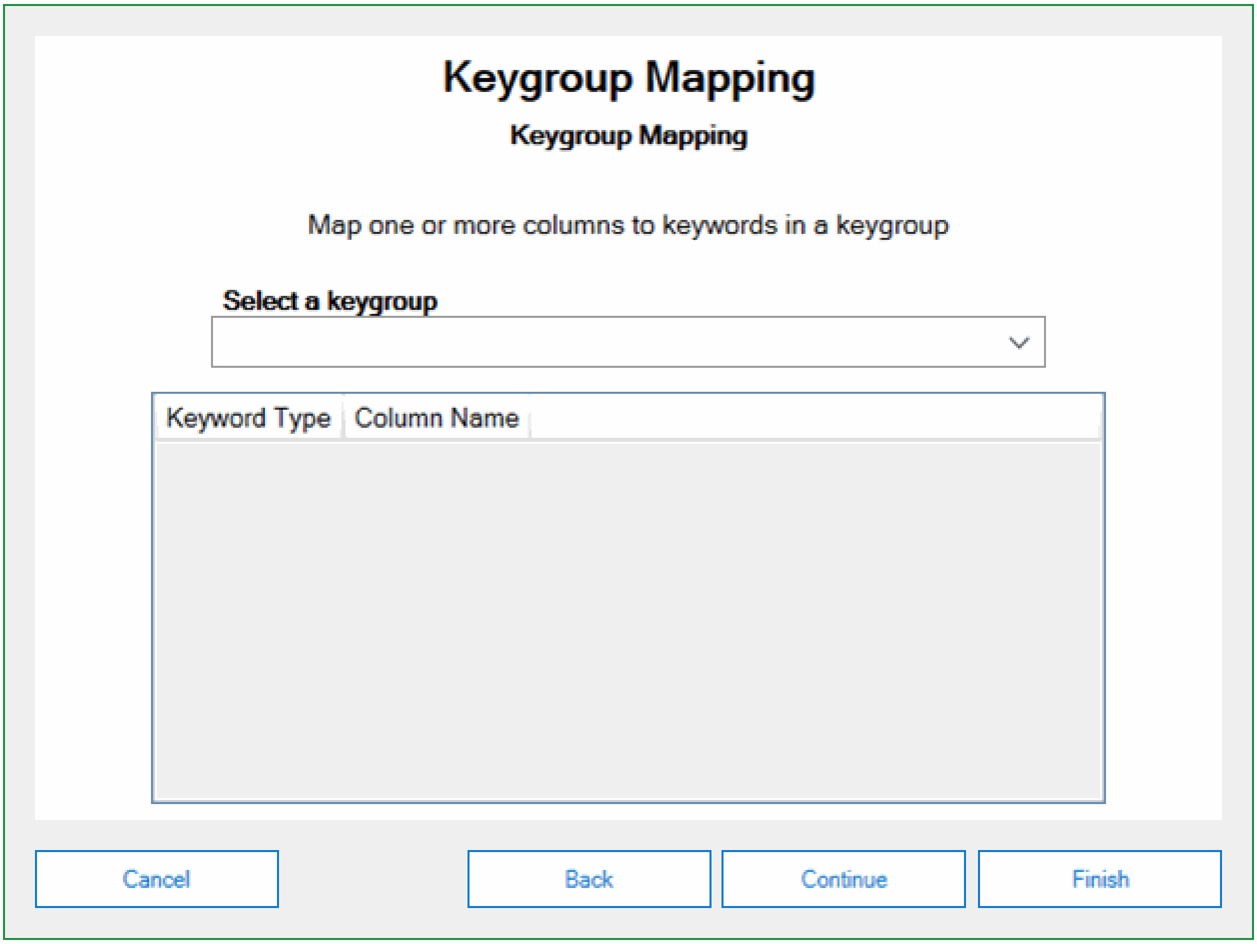
Note: Multiple instances of a single Keyword Type will be displayed in the **Import** pane. If these are duplicate instances, then only a single instance will be saved on the composed document. If the instances differ, both instances will be saved. If a template is configured to **Inherit Keywords from Source Document when possible**, and another Keyword Value is mapped to the same Keyword Type, both Keyword Values will be displayed in the **Import** pane.

2. Click **Finish**.
3. Click **Save Template**.

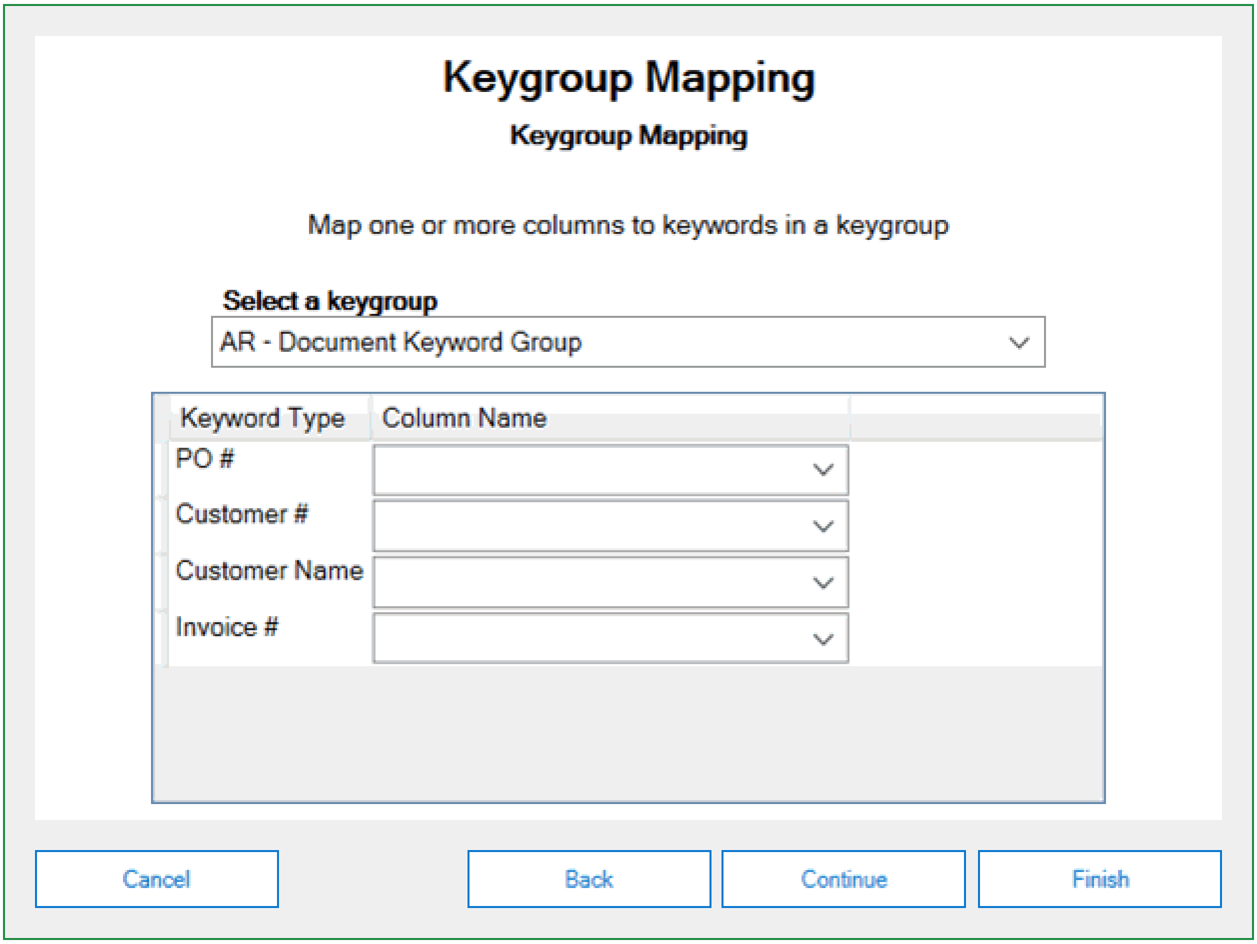
Configuring Keygroup Mapping

Values from XML Path Placeholders configured to **Insert the results as a table** can be mapped to keywords in a Keyword Type Group or Multi-Instance Keyword Type Group.

You can map column names to keywords in a Keyword Type Group or Multi-Instance Keyword Type Group using the **Keygroup Mapping** dialog box:



1. From the **Select a keygroup** drop-down list, select a Keyword Type Group or Multi-Instance Keyword Type Group.
2. The Keyword Types in the Keyword Type Group or Multi-Instance Keyword Type Group are displayed in the **Keyword Type** column:



3. For each Keyword Type, select the column that will provide this value from the corresponding drop-down list.
4. Click **Finish**.

Configuring Required Placeholders

After a Placeholder is created, you can configure it to be required for composition. Required Placeholders must be populated in order for composition to complete.

The **Required Placeholder** dialog box is accessed through the **Setup** button or the **Required** hyperlink on the **Placeholder SEttings** pane of a selected Placeholder.

To configure whether a Placeholder is required:

1. On the **Required Placeholder** dialog box, select one of the following options:

Option	Description
Required	Click to make the Placeholder required for composition. If a required Placeholder is not populated, composition will not complete.
Not Required	Click to make the Placeholder optional for composition. If a Placeholder is not required, and is unpopulated, composition can still complete.

2. Click **Finish**.
3. Click **Save Template**.

Configuring Conditions

After a Placeholder is created and configured, you can set up a condition to determine the Placeholder value that will be inserted on the document.

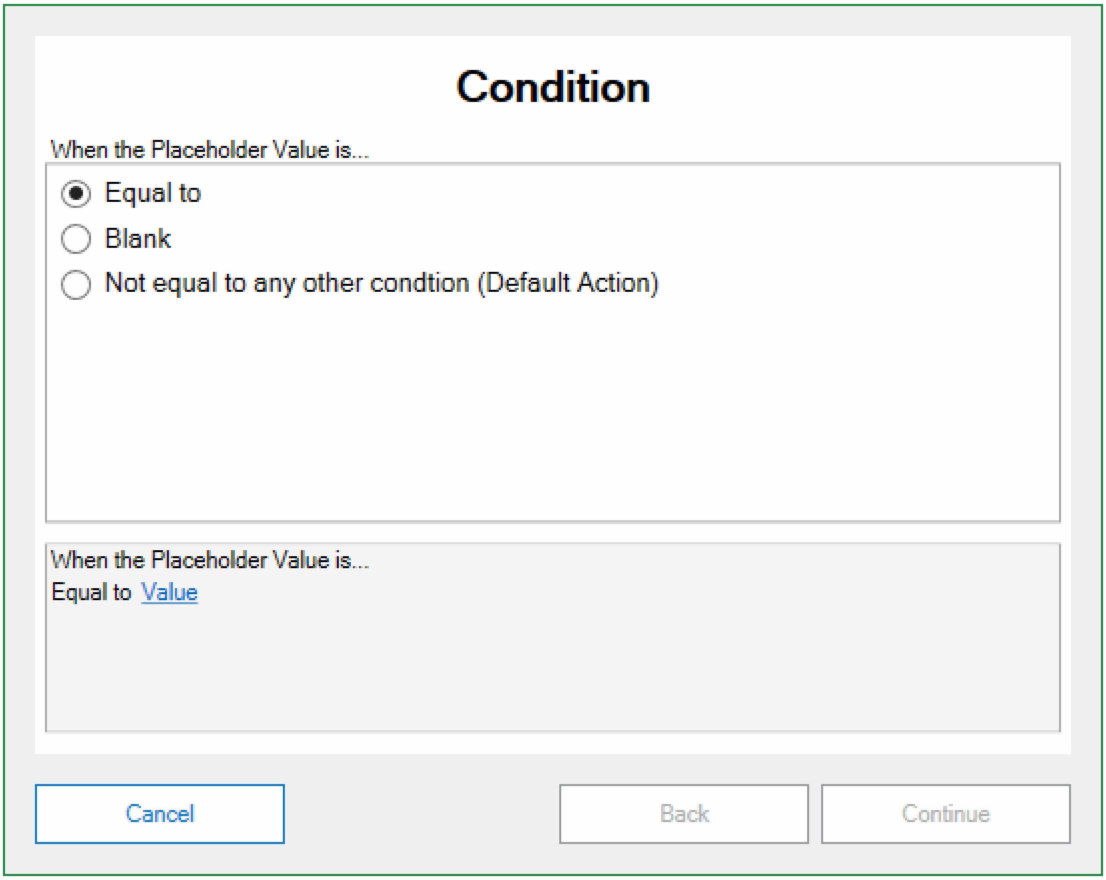
For example, a Loans Department handles documents that contain a **Status** Keyword Type. The two available Keyword Values are **Denied** or **Accepted**. When this Keyword Value is indexed, a Keyword Placeholder can be configured to pull the Keyword Values from the source document. You can configure conditions for the Keyword Placeholder based on the Keyword Values. This allows for a value to be inserted into the document, depending on which Keyword Value is found. Templates can also be inserted into the document. You could configure the condition so that when a document contains the **Accepted** Keyword Value, a congratulatory template would be inserted upon document creation.

To configure a condition for a Placeholder:

1. From the **Placeholder Settings** pane, click **Conditions**.
2. The **Conditions** dialog box is displayed:

3. Click **New Condition**.

4. The **Condition** dialog box is displayed:

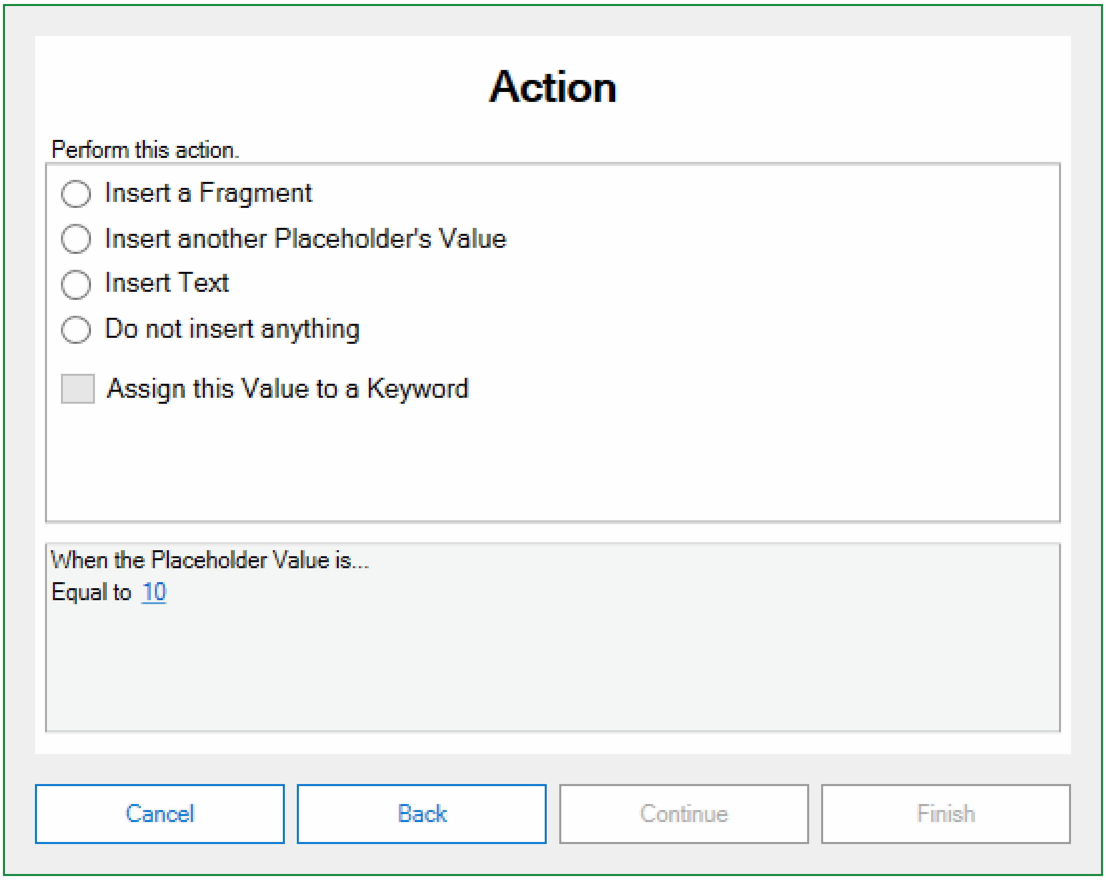


5. Select one of the following options:

Option	Description
Equal to	Select if the Placeholder value will be equal to a value. Click the **Value** hyperlink to specify a value in the **Equal to** screen. Values are limited to 127 characters. **Note:** If you are configuring a date condition, the date format of the **Equal to** value must match the date format of the Placeholder.
Blank	Select if the Placeholder value will be blank.
Not equal to any other condition	Select if the Placeholder value will not be equal to any other condition.

6. Click **Continue**.

7. The **Action** dialog box is displayed:



8. Select one of the following options:

Option	Description
Insert a Fragment	Select to insert a fragment or template. **Note:** Placeholders that are formatted to display as bar code images only output the value when inserting a fragment or template. The bar code image is not generated. **Note:** Inserting a fragment into itself or any dependent fragments is not supported. For example, fragment "HR - Offer" cannot be inserted into fragment "HR - Offer". Additionally, fragment "HR - Offer" cannot be inserted into fragment "Application Approved" if fragment "Application Approved" is inserted into fragment "HR - Offer". Click the **Fragment** hyperlink to select a fragment or template. To filter the list of available fragments and templates, do one or more of the following: • Select the template group the template or fragment resides in from the **Template Group** drop-down list. The list displays only fragments and templates associated with the template group. • Type the name of the fragment or template into the **Fragment** field. The list is filtered as you type. **Tip:** You can type any part of the fragment or template name to yield results. Select the **Match destination style** check box if the text in the fragment should match the font, size, and color of the text that is used in the composed document. When the document is composed, the text in the fragment will inherit the characteristics of the character immediately before the Placeholder. If there is not a character immediately before the Placeholder, the text in the fragment will inherit the characteristics of the character immediately following the Placeholder. If the Placeholder is inserted in a template’s header, it will inherit the default document style. If the template’s default style is not the style used in the rest of the template, select the Placeholder and configure it to match the style used in the rest of the template. If the Placeholder is inserted at the beginning of the document, it will inherit the default document style. If the template’s default style is not the style used in the rest of the template, select the Placeholder and the space immediately following it and configure it to match the style used in the rest of the template.

Option	Description
Insert another Placeholder's Value	Select to insert another Placeholder's value. Click the **Placeholder** hyperlink to select a Placeholder.
Insert Text	Select to insert text. Click the **Text** hyperlink to specify the text to insert. The text value is limited to 127 characters.
Do not insert anything	Select to insert nothing.

9. If you selected the **Insert another Placeholder's Value** or **Insert Text** options, the **Assign this Value to a Keyword** check box is available. Select this check box to assign the inserted Placeholder or text to a keyword. Click the **Keyword** hyperlink to select a Keyword Type using the **Filter by Document Type** and/or **Keyword Type** drop-down lists.
10. Click **Finish**.
11. The condition is added to the **Conditions** dialog box.
12. Repeat steps 3 through 11 to create additional conditions for the Placeholder.

    To edit a condition, select the condition and click **Edit Condition**.

    To delete a condition, select the condition and click **Delete Condition**.

Deleting Placeholders

Placeholders that have been created can be deleted.

To delete a placeholder:

1. On the **Placeholder** pane, expand a Placeholder type and select a Placeholder.
2. Click **Delete**.

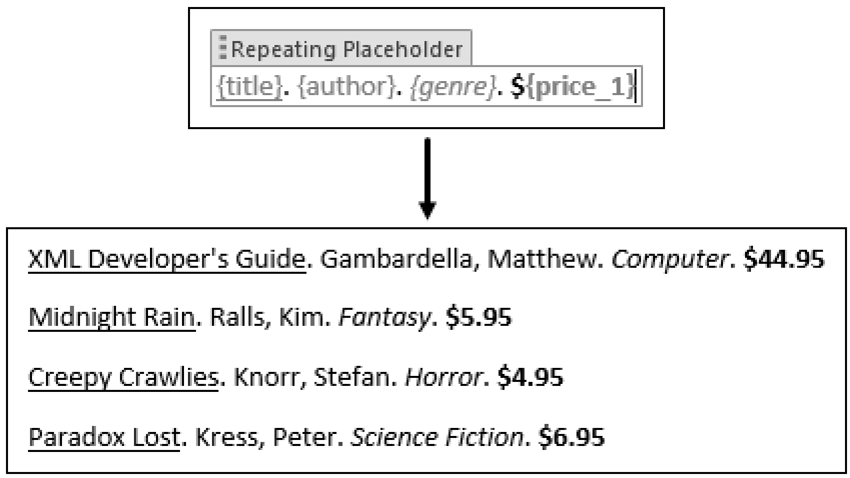
3. A dialog box is displayed to confirm deletion. Click **OK** to confirm that you want to delete the Placeholder. Click **Cancel** to retain the Placeholder.

Note: Deleting a Placeholder removes all instances of this Placeholder from the template, whether or not this Placeholder has been added to the template.

4. Click **Save Template**.

Repeating Placeholders

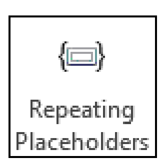
Placeholders pull values from OnBase into the document template. Placeholders can be placed in the body of a Microsoft Word document, and in other areas, such as headers and footers. Repeating Placeholders allow you to pull in multiple values using a specified XML query or Multi-Instance Keyword Group in one Placeholder. For example, inserting a single instance of a Repeating XML Query Placeholder and its Nested Placeholders in a template will compose all values found:



Creating Repeating Placeholders

To create Repeating Placeholders:

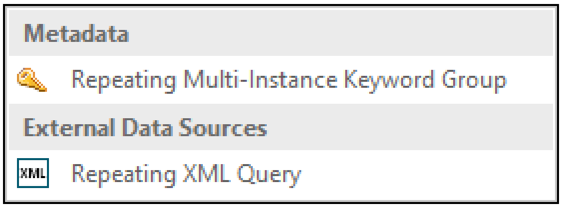
1. In the **Repeating Placeholders** group on the **Template Builder** ribbon, perform one of the following, and log in to OnBase, if prompted:
   - Click **Create New**.
   - Click **Repeating Placeholders**.

   The **Repeating Placeholders** pane is displayed. Click **Create New**.

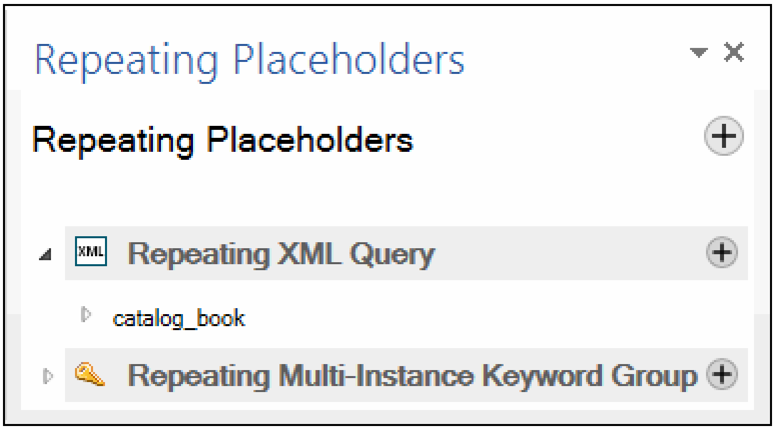
   

2. The **Create New** drop-down list is displayed:



3. Select and configure a Repeating Placeholder type from the **Create New** drop-down list. For Repeating Placeholder type configuration, see the following:
   - Configuring Repeating and Nested Multi-Instance Keyword Group Placeholders on page 219
   - Configuring Repeating and Nested XML Query Placeholders on page 224

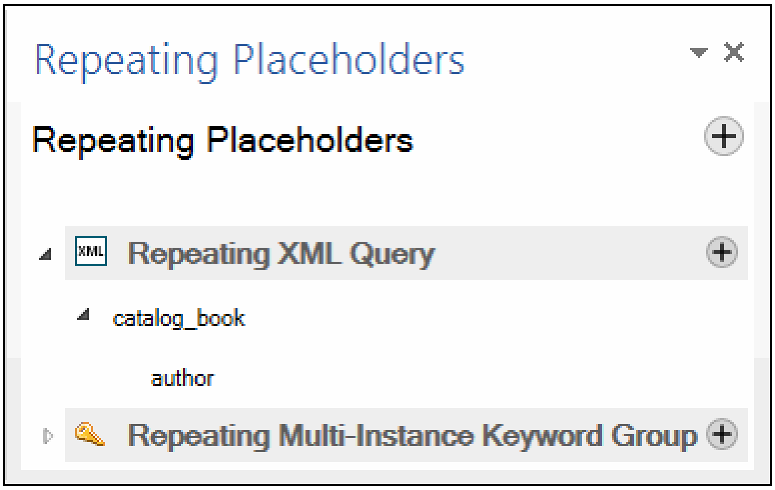
4. The **Repeating Placeholders** pane is displayed and lists all created Repeating Placeholders, organized by Repeating Placeholder type. Click the arrow to expand or collapse Repeating Placeholder types.



Note: Only Repeating Placeholder types with existing Repeating Placeholders are listed in the **Repeating Placeholders** pane. All existing Repeating Placeholders are listed, whether or not they have existing Nested Placeholders.

To directly create additional Repeating Placeholders of a specific type, click **Create New** next to the Repeating Placeholder type.

To display a Repeating Placeholder's Nested Placeholders, click the arrow next to the Repeating Placeholder.



To directly create additional Nested Placeholders for a specific Repeating Placeholder, hover the cursor over the Repeating Placeholder and click **Create New**.

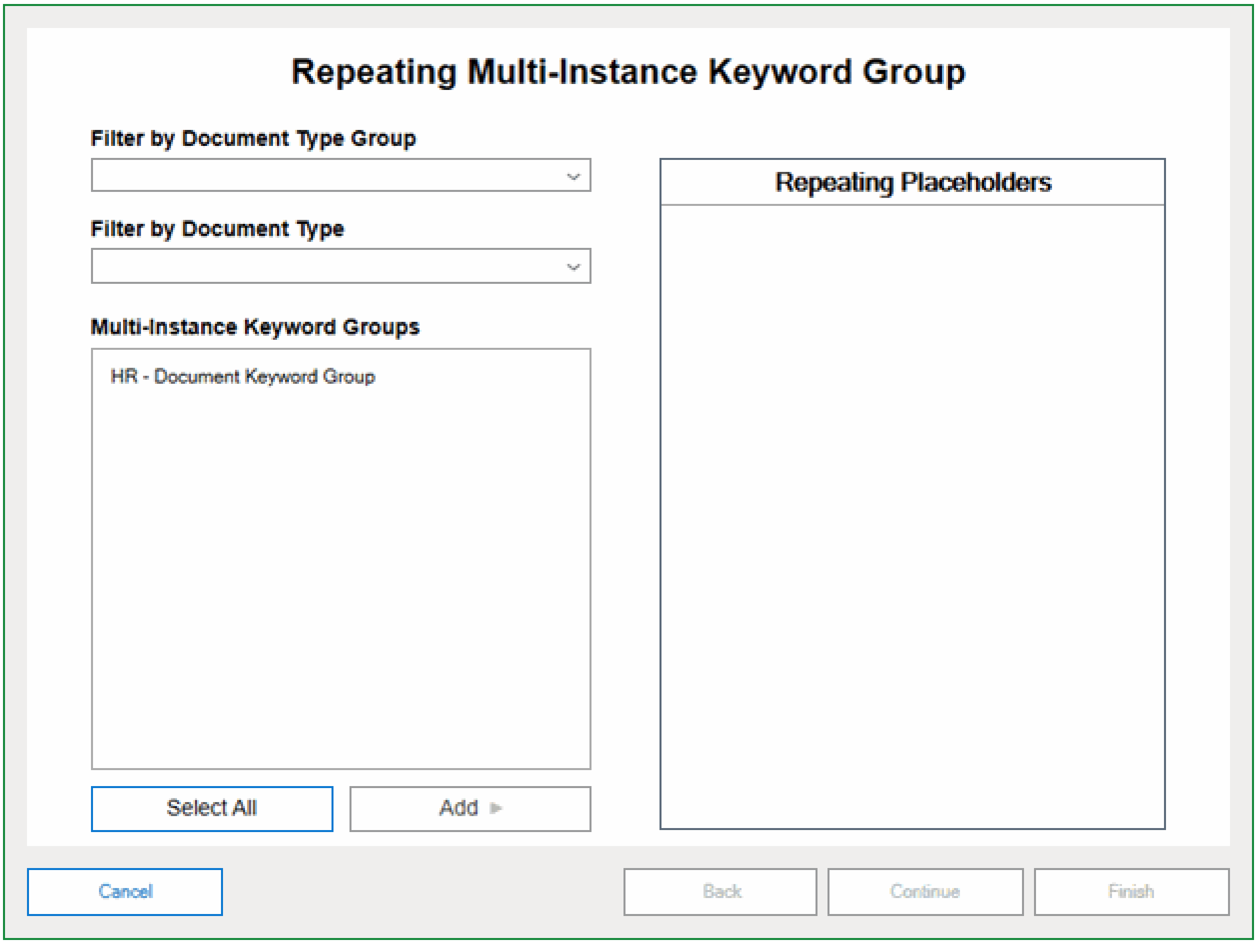
For additional Nested Placeholder configuration options, see Editing Placeholders on page 193.

Configuring Repeating and Nested Multi-Instance Keyword Group Placeholders

In the Repeating Placeholders **Create New** drop-down list, **Repeating Multi-Instance Keyword Group** inserts a Placeholder into which Nested Placeholders can be inserted. Nested Multi-Instance Keyword Group Placeholders insert a Keyword Value from the source document or an Application Enabler scrape event.

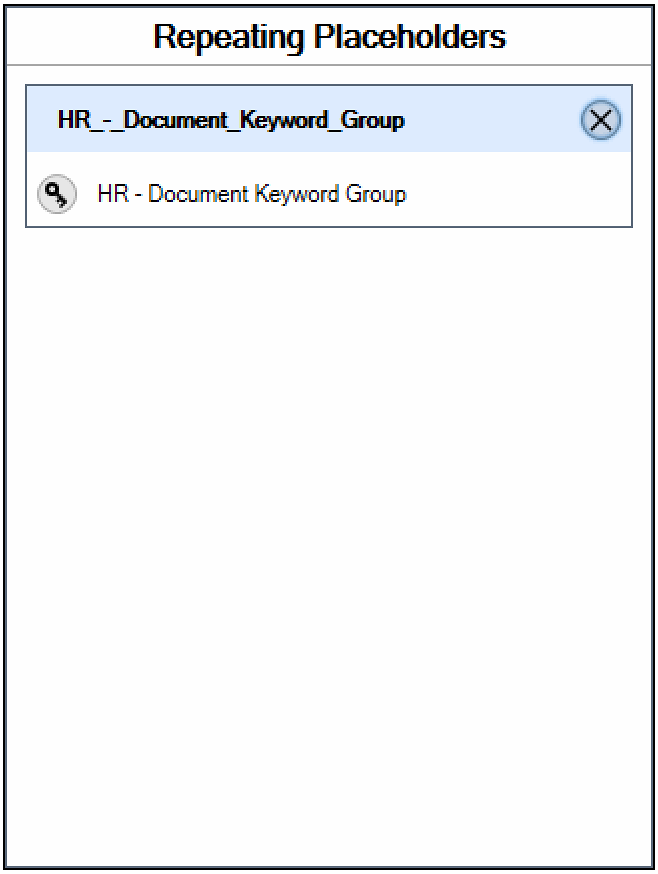
To create a Repeating Multi-Instance Keyword Group Placeholder:

1. From the **Create New** drop-down list, select **Repeating Multi-Instance Keyword Group**.
2. The **Repeating Multi-Instance Keyword Group** dialog box is displayed.

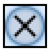


3. Select a Multi-Instance Keyword Group from the **Multi-Instance Keyword Groups** list.
   - To filter the **Multi-Instance Keyword Groups** list, select a Document Type Group from the **Filter by Document Type Group** drop-down list and a Document Type from the **Filter by Document Type** drop-down list.
   - To select all Multi-Instance Keyword Groups, click **Select All**.

4. Click **Add**.
5. The selected Multi-Instance Keyword Group is displayed in the **Repeating Placeholders** list.

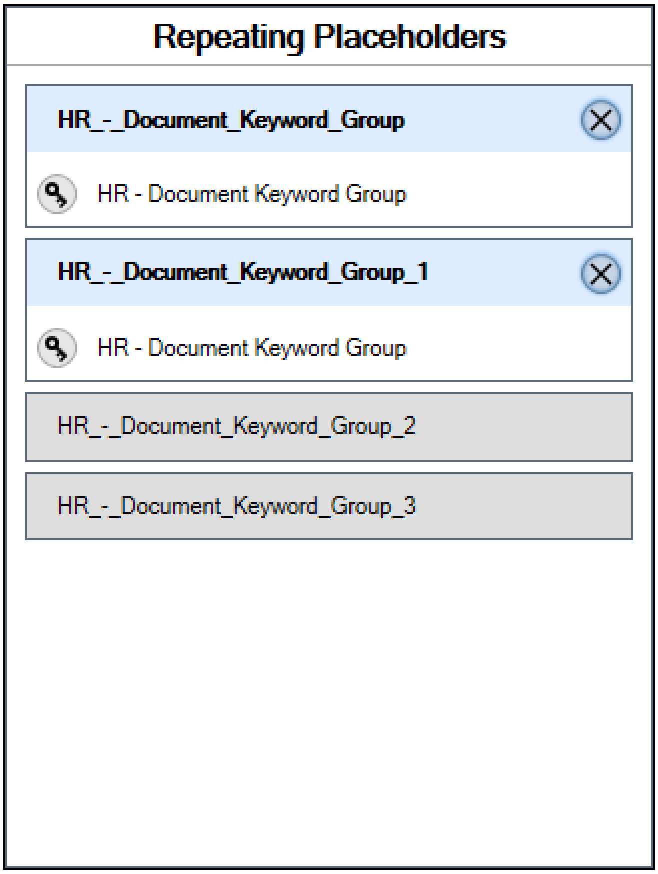


To remove the selected Multi-Instance Keyword Group from the **Repeating Placeholders** list, click **Delete**.



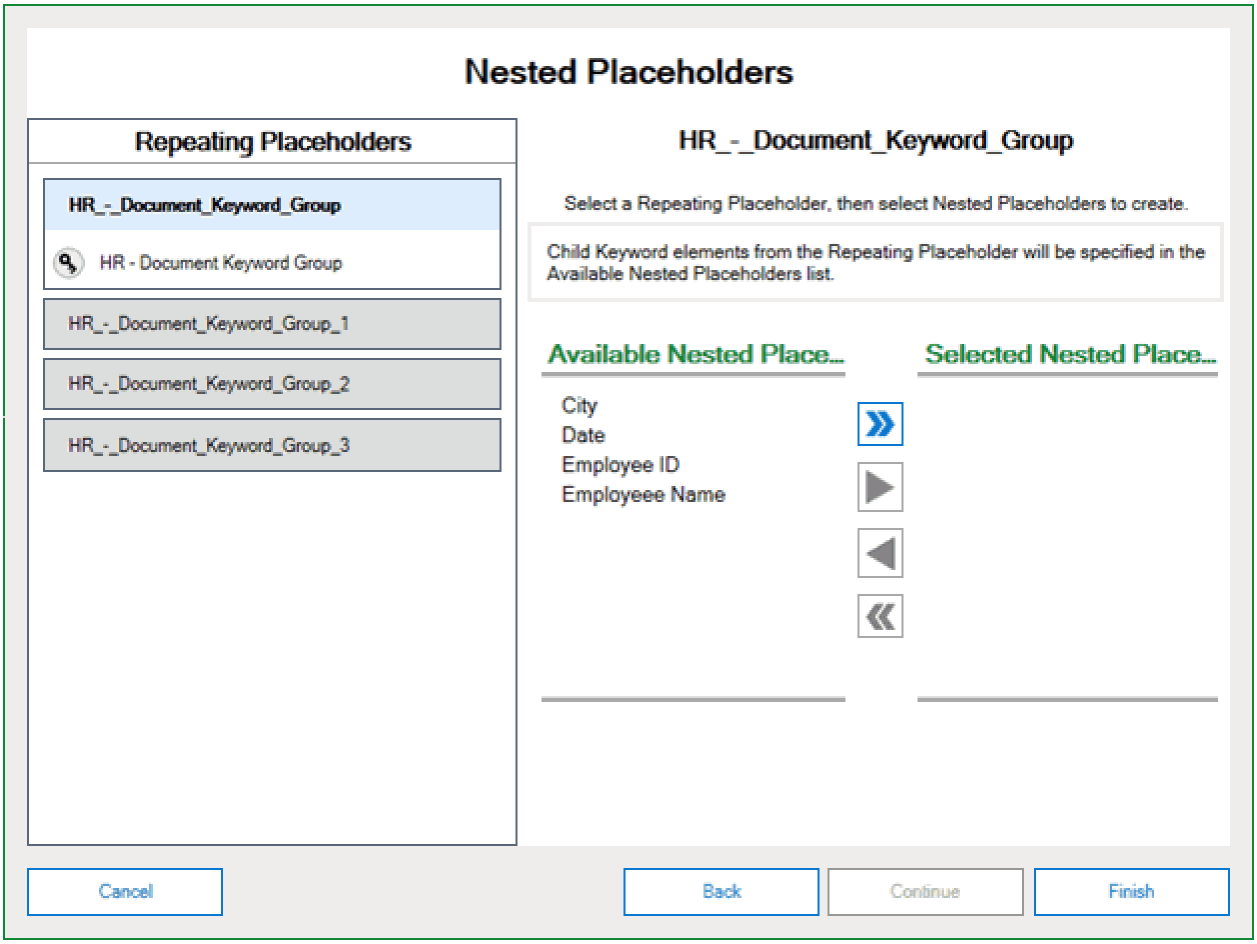
6. Repeat steps 3 through 5 to create additional Repeating Multi-Instance Keyword Group Placeholders.

7. In the **Repeating Placeholders** list, click the blue bar to collapse a selected Multi-Instance Keyword Group. Click the gray bar to expand a selected Multi-Instance Keyword Group.

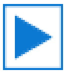


8. Click **Continue**.

9. The **Nested Placeholders** dialog box is displayed.



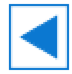
10. Select a Repeating Placeholder from the **Repeating Placeholders** list to configure its Nested Placeholders. If no Nested Placeholders are required, skip to step 13.
11. Select one or more child Keyword elements from the **Available Nested Placeholders** list. Hold **Ctrl** to select multiple child Keyword elements.
    a. To add child Keyword elements to the **Selected Nested Placeholders** list, double-click a single child Keyword element or click **Add Selected Items**.

    To add all available child Keyword elements to the **Selected Nested Placeholders** list, click **Add All Items**.

b. To remove child Keyword elements from the **Selected Nested Placeholders** list, select a child Keyword element or hold **Ctrl** to select multiple child Keyword elements. Double-click a single child Keyword element or click **Remove Selected Items**.



To remove all available child Keyword elements from the **Selected Nested Placeholders** list, click **Remove All Items**.

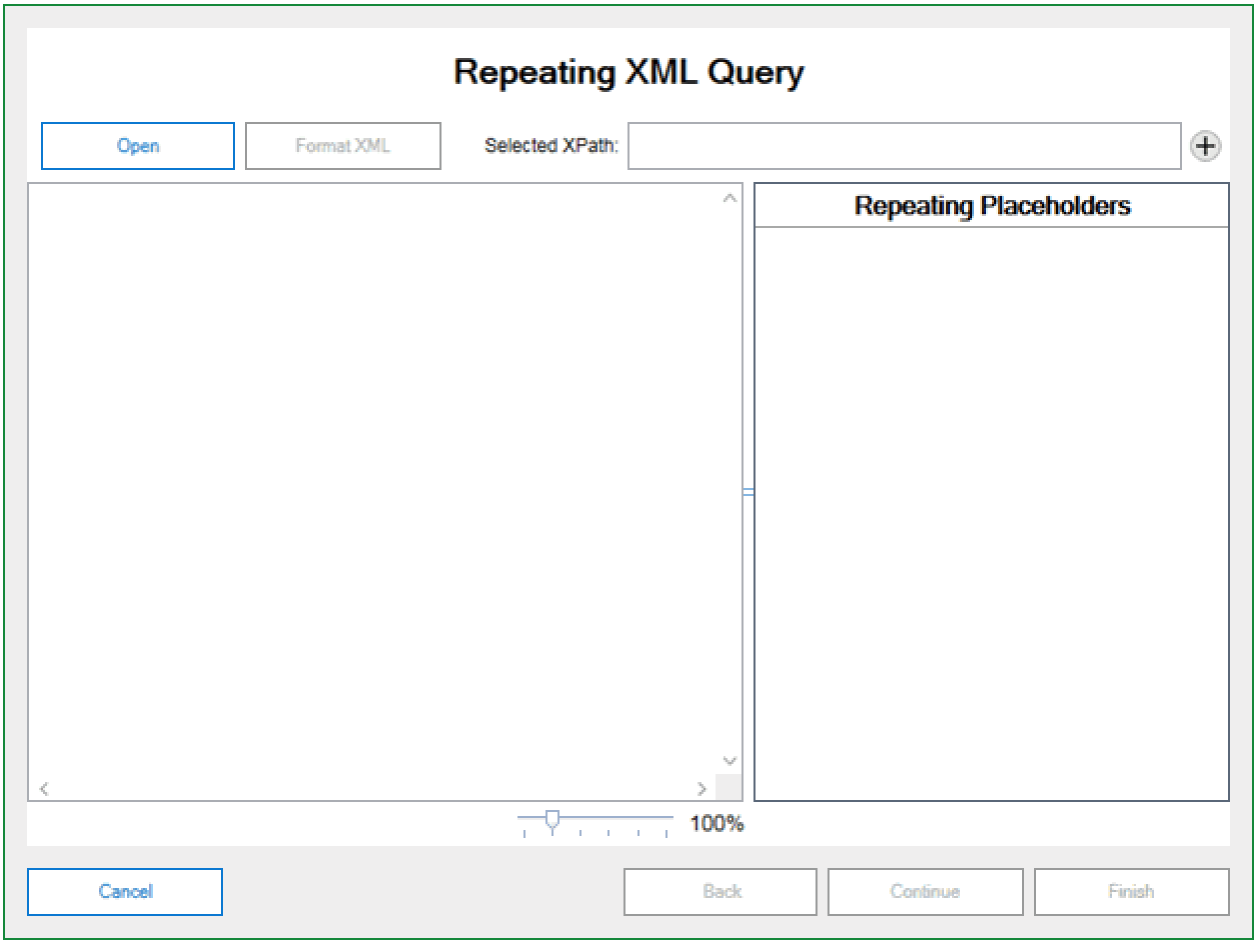
12. Repeat steps 10 through 11 to configure additional Nested Multi-Instance Keyword Group Placeholders.
13. Click **Finish**.

Configuring Repeating and Nested XML Query Placeholders

In the Repeating Placeholders **Create New** drop-down list, **Repeating XML Query** inserts a Placeholder into which Nested Placeholders can be inserted. Nested XML Query Placeholders insert a text or image value from an XML string. Use XML to pass in values through the OnBase API.

To create a Repeating XML Query Placeholder:

1. From the **Create New** drop-down list, select **Repeating XML Query**.
2. The **Repeating XML Query** dialog box is displayed.

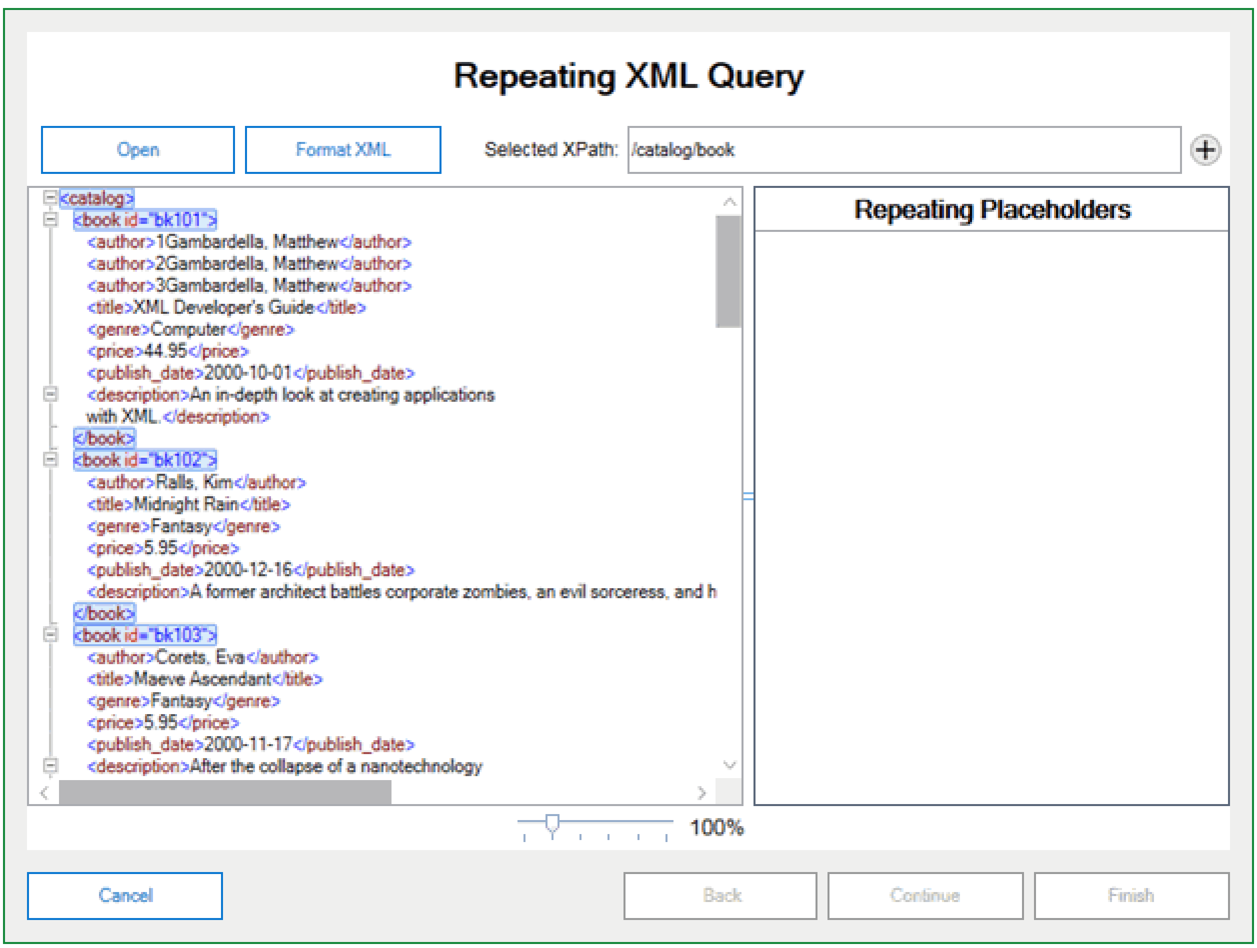


3. Enter the XML Path in the **Selected XPath** field using one of the following methods:
   - Type the XML Path in the **Selected XPath** field. For example, **/data/listdata** or **/data/rowdata**. Skip to step 5.
   -

Note: The initial **/** in the XPath is required if the root node is not specified first in the XPath.

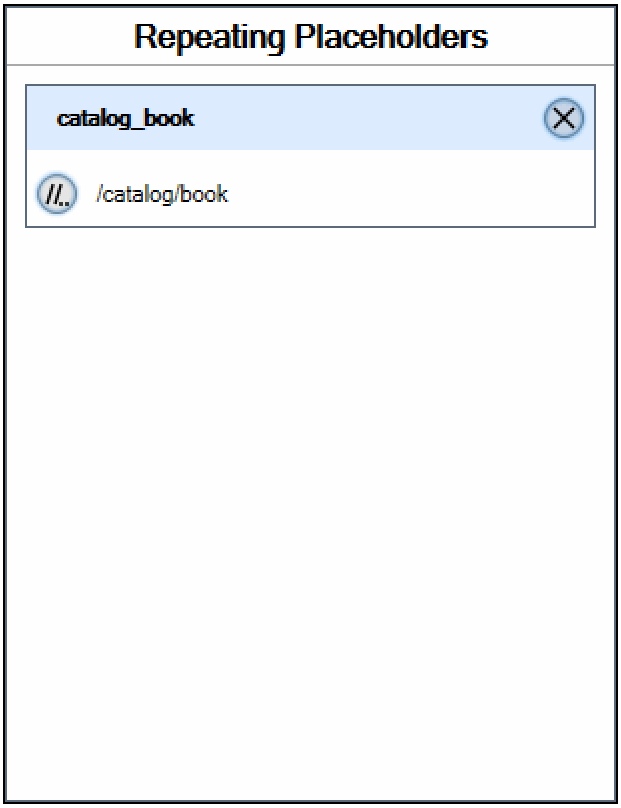
Note: If the XPath contains internal " " (quotation marks), the XPath must be entered into the **Selected XPath** field manually.

   - Click **Open** to select an XML path from an XML file. Continue to step 4.
4. Select an XML element or attribute from the XML file content pane. The **Selected XPath** field is populated.



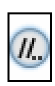
   If the XML file content is not displayed properly, click **Format XML**.
5. Click **Add to Repeating Placeholder list**.

6. The selected XPath is displayed in the **Repeating Placeholders** list.



   To remove the selected XPath from the **Repeating Placeholders** list, click **Delete**.

7. If necessary, click **Edit XPath** to edit the selected XPath.

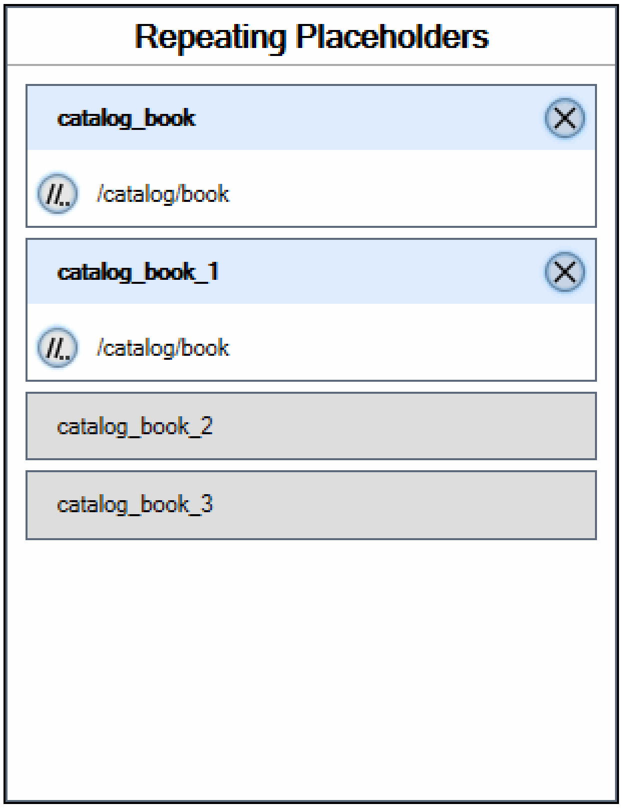


   a. Edit the XPath in the **Selected XPath** field.
   b. Click **Accept** to accept the changes.

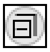
   Click **Cancel** to cancel the changes.

8. Repeat steps 3 through 7 to create additional Repeating XML Query Placeholders.

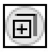
9. In the **Repeating Placeholders** list, click the blue bar to collapse a selected XPath. Click the gray bar to expand a selected XPath.



To collapse all selected XPaths, click **Collapse All**.

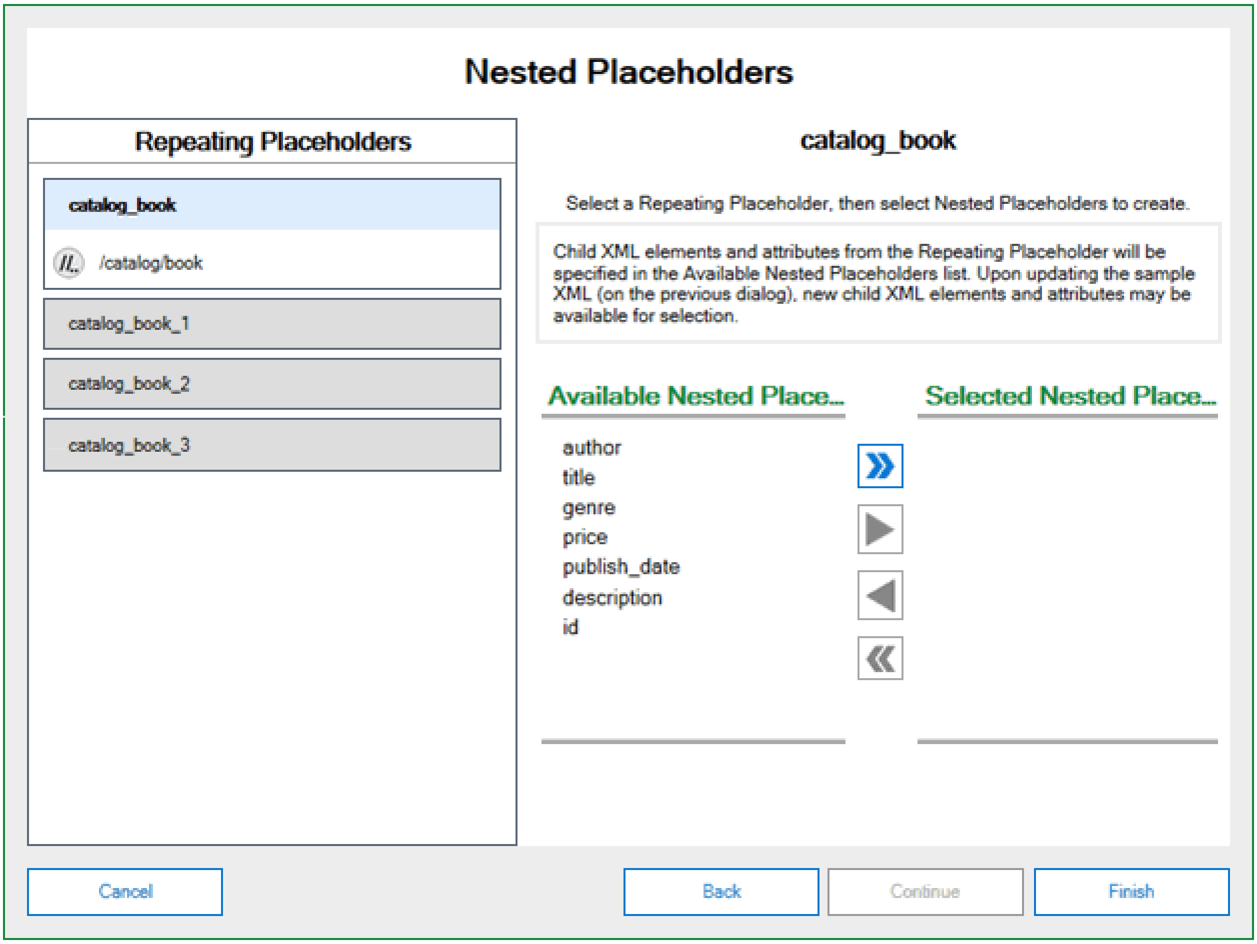


To expand all selected XPaths, click **Expand All**.

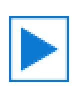


10. Click **Continue**.

11. The **Nested Placeholders** dialog box is displayed.



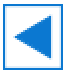
12. Select a Repeating Placeholder from the **Repeating Placeholders** list to configure its Nested Placeholders. If no Nested Placeholders are required, skip to step 19.
13. Select one or more child XML elements or attributes from the **Available Nested Placeholders** list. Hold **Ctrl** to select multiple child XML elements or attributes.
    a. To add child XML elements or attributes to the **Selected Nested Placeholders** list, double-click a single child XML element or attribute or click **Add Selected Items**.

    To add all available child XML elements and attributes to the **Selected Nested Placeholders** list, click **Add All Items**.

b. To remove child XML elements or attributes from the **Selected Nested Placeholders** list, select a child XML element or attribute or hold **Ctrl** to select multiple child XML elements or attributes. Double-click a single child XML element or attribute or click **Remove Selected Items**.

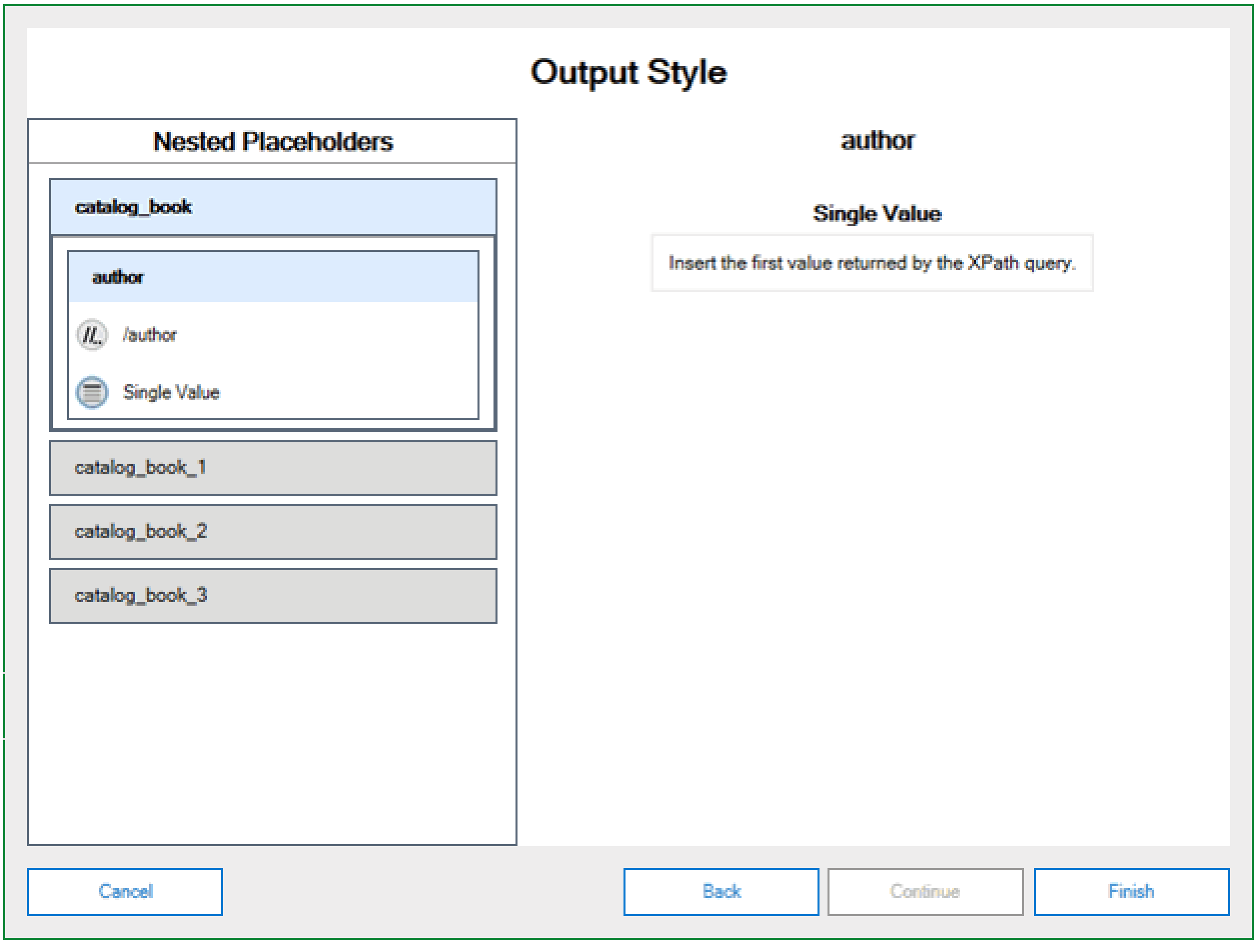


To remove all available child XML elements and attributes from the **Selected Nested Placeholders** list, click **Remove All Items**.

14. Repeat steps 12 through 13 to configure additional Nested XML Query Placeholders.
15. Click **Continue**.

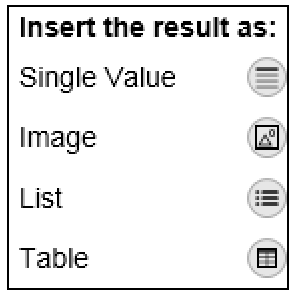
Note: Nested Placeholders are automatically configured as **Single Value**, however, the output style can be changed on the **Output Style** dialog box.

16. The **Output Style** dialog box is displayed.



17. Click each selected Repeating Placeholder to view its Nested Placeholders. Select each Nested Placeholder to view an output style summary and configure any additional settings.
18. If necessary, click **Edit Output Style** to edit the selected Nested Placeholder output style.

    a. The **Insert the result as** drop-down list is displayed.



b. Select an output style.

- **Single Value** - Select to insert the first value returned by the XPath query on the document. **Single Value** has no additional settings.
- **Image** - Select to insert the results of the query as an image. The results of the query must be encoded using Base64 encoding and must be an image format that can be inserted into a Word document. **Image** has no additional settings.
- **List** - Select to insert the results of the query as a list. All content from the top level nodes returned by the XPath query is inserted as a list embedded on the document. This Placeholder appears on the document like other Placeholders. Any list formatting that is applied to the Placeholder is used after the document is created and the values are inserted in the list.

  If the XPath query result includes a delimiter, type this delimiter in the **Delimiter (Optional)** field.

  For example, if the delimiter is a comma, the XML should be structured as follows:

  ```
  <data>
  <listdata>rowdata1,rowdata2,rowdata3</listdata>
  <data>
  ```

  If the XPath query result does not include a delimiter, row data must be supplied as individual elements. For example:

  ```
  <data>
  <listdata>rowdata1</listdata>
  <listdata>rowdata2</listdata>
  <listdata>rowdata3</listdata>
  </data>
  ```

Note: Outline formatting is not supported.

- **Table** - Select to insert all the values retrieved by the XPath query as a table embedded on the document. Instances of this Placeholder appear on the document as an empty table. Any column headers entered in the top row of this table are preserved when the values are filled in. Table styles are also preserved.

  In the **Column Names** field, specify column names as a comma delimited list. These columns should be child elements to row elements. For example, **column1,column2,column3**. In this example, the XML would be structured as follows:

  ```
  <data>
  <rowdata>
  <column1>data1</column1>
  <column2>data2</column2>
  <column3>data3</column3>
  </rowdata>
  </data>
  ```

  When inserting values as a table, elements that are not included in the columns specified in the **Column Names field** are ignored. If a column is not found in a particular row, an empty cell is inserted. If necessary, columns can also be reordered.

19. Click **Finish**

Inserting a Repeating Placeholder or Nested Placeholder

After a Repeating Placeholder or Nested Placeholder has been created, it can be inserted into a template.

Note: Nested Placeholders must be inserted within their associated Repeating Placeholders.

Inserting a Repeating Placeholder

To insert an existing Repeating Placeholder into a template:

1. Place the cursor where the Repeating Placeholder should be inserted.
2. On the **Repeating Placeholder** pane, expand a Placeholder type and hover the cursor over a Repeating Placeholder.
3. Click **Insert**.

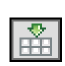
4. The Repeating Placeholder is inserted into the template.

5. Type in the provided space or insert a Nested Placeholder. See Inserting a Nested Placeholder on page 233.
6. Apply a font or style to the Repeating Placeholder, if necessary, using the Microsoft Word toolbar. Any fonts or styles used for the Repeating Placeholder will be used for the value that is inserted in the composed document. If no fonts or styles are applied to the Repeating Placeholder, the font and style will be inherited from the character prior to the Repeating Placeholder. If there are no characters prior to the Repeating Placeholder, the font and style will be inherited from the character following the Repeating Placeholder.
7. Click **Save Template**.

Inserting a Repeating Placeholder as a Table

To insert an existing Repeating Placeholder into a template as a table:

1. Place the cursor where the Repeating Placeholder table should be inserted.
2. On the **Repeating Placeholder** pane, expand a Placeholder type and hover the cursor over a Repeating Placeholder.
3. Click **Insert as Table**:



4. The Repeating Placeholder is inserted into the template as a blank table containing 3 rows and as many columns as the number of Nested Placeholders configured for the Repeating Placeholder. Modify the number of rows and columns, if necessary.
5. In the table cells, type in the provided space or insert a Nested Placeholder. See Inserting a Nested Placeholder on page 233.

Note: Rows that do not contain data will not be shown in the composed document.

6. Apply a font or style to the Repeating Placeholder, if necessary, using the Microsoft Word toolbar. Any fonts or styles used for the Repeating Placeholder will be used for the value that is inserted in the composed document. If no fonts or styles are applied to the Repeating Placeholder, the font and style will be inherited from the character prior to the Repeating Placeholder. If there are no characters prior to the Repeating Placeholder, the font and style will be inherited from the character following the Repeating Placeholder.
7. Click **Save Template**.

Inserting a Nested Placeholder

To insert an existing Nested Placeholder into a template:

1. Place the cursor within the associated Repeating Placeholder where the Nested Placeholder should be inserted.

Note: The associated Repeating Placeholder must already be inserted in the template. For more information, see Inserting a Repeating Placeholder on page 232.

Note: Repeating Multi-Instance Keyword Group Placeholders and Repeating XML Query Placeholders cannot be inserted into a Repeating Multi-Instance Keyword Group Placeholder, and Repeating Multi-Instance Keyword Group Placeholders cannot be inserted into a Repeating XML Query Placeholder.

2. On the **Repeating Placeholder** pane, expand the Placeholder type, expand the associated Repeating Placeholder, and hover the cursor over the Nested Placeholder.
3. Click **Insert**.

4. The Nested Placeholder is inserted into the Repeating Placeholder as:
   `{[Nested Placeholder Name]}`
5. Apply a font or style to the Nested Placeholder, if necessary, using the Microsoft Word toolbar. Any fonts or styles used for the Nested Placeholder will be used for the value that is inserted in the composed document. If no fonts or styles are applied to the Nested Placeholder, the font and style will be inherited from the character prior to the Nested Placeholder. If there are no characters prior to the Nested Placeholder, the font and style will be inherited from the character following the Nested Placeholder.
6. Click **Save Template**.

Editing Repeating and Nested Placeholders

Repeating XML Query Placeholders and Nested Placeholders that have been created and configured can be edited.

Editing Repeating XML Query Placeholders

To edit a Repeating XML Query Placeholder:

1. On the **Repeating Placeholder** pane, expand the Placeholder type and hover the cursor over the Repeating Placeholder.
2. Click **Edit**.

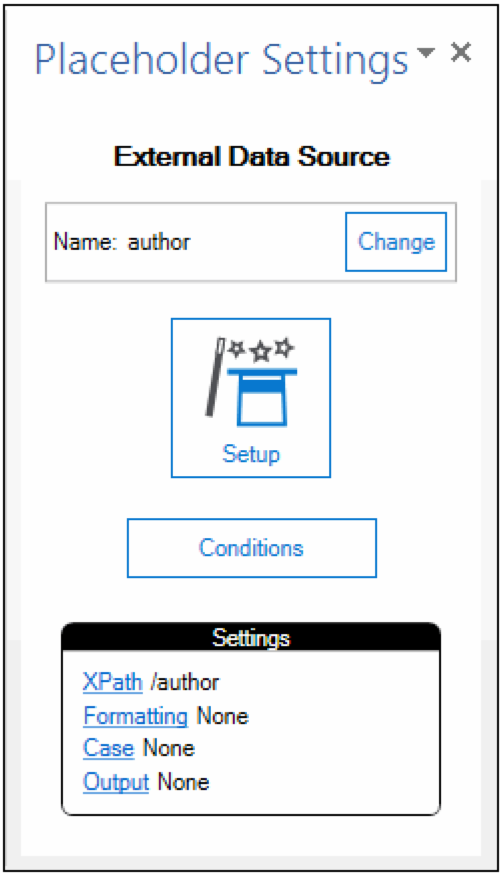
3. The **Repeating XML Query** dialog box is displayed.
4. Make any necessary changes. For more information, see Configuring Repeating and Nested XML Query Placeholders on page 224.
5. Click **Finish**.
6. Click **Save Template**.

Editing Nested Placeholders

To edit a Nested Placeholder:

1. If the Nested Placeholder has already been added to the template, click the Nested Placeholder, and skip to step 6.
2. If the Nested Placeholder has not yet been added to the template, on the **Repeating Placeholder** pane, expand the Placeholder type and associated Repeating Placeholder, and hover the cursor over the Nested Placeholder.
3. Click **Edit**.

4. The **Placeholder Settings** pane is displayed.



5. To change the name of the Nested Placeholder, click **Change** and type a new name in the **Placeholder Name** dialog box.

6. On the **Placeholder Settings** pane, click **Setup** to edit all settings, or click the appropriate hyperlink in the **Settings** section to edit the following settings:

Hyperlink	Description
Type	Click to edit the Nested Placeholder's type. See Creating Placeholders on page 133 for more information on Placeholder types.
Value	Click to edit the Nested Placeholder's value. See Creating Placeholders on page 133 for more information on Placeholder values.
XPath	Click to edit the XPath of a Nested XML Query Placeholder. See Configuring Repeating and Nested XML Query Placeholders on page 224 for more information on Nested XML Query Placeholders.
Editable	Click to edit the restrictions for editing the Nested Placeholder during preview. **Note:** The **Editable** hyperlink is only available when **Restrict Edit Preview Settings to Select Placeholder Values** is selected on the **General Settings** dialog box from the **Template Options** pane. For more information, see Configuring Edit During Preview on page 196.
Formatting	Click to edit the Nested Placeholder's formatting. See Configuring Display Style on page 198 for more information on Placeholder formatting.
Case	Click to edit the Nested Placeholder's case. See Configuring Case Correction on page 205 for more information on Placeholder case.
Output	Click to edit the Nested Placeholder's output. See Configuring Keyword Mapping on page 206 for more information on Placeholder output.
Style	Click to edit the way the Nested Placeholder's XPath query results will be displayed. For more information on configuring Nested Placeholder value Style, see Configuring Repeating and Nested XML Query Placeholders on page 224.

Note: The available hyperlinks depend on the type of Placeholder being edited.

7. If the Nested Placeholder being edited is an XML Query with output style **Insert the results as a table**, the **Keygroup Mapping** dialog box is displayed. See Configuring Keygroup Mapping on page 207 for more information on Keygroup mapping.
8. Click **Finish**.

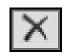
9. Click **Conditions** to edit any configured conditions, or create a new condition. For more information on configuring conditions, see Configuring Conditions on page 210.
10. Click **Save Template**.

Deleting Repeating and Nested Placeholders

Repeating Placeholders and Nested Placeholders that have been created can be deleted.

To delete a Repeating Placeholder:

1. On the **Repeating Placeholder** pane, expand a Placeholder type and hover the cursor over a Repeating Placeholder.
2. Click **Delete**.



3. A dialog box is displayed to confirm deletion. Click **OK** to confirm that you want to delete the Repeating Placeholder. Click **Cancel** to retain the Repeating Placeholder.

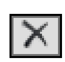
Caution: Deleting a Repeating Placeholder will delete all its associated Nested Placeholders.

Note: Deleting a Repeating Placeholder removes all instances of this Repeating Placeholder from the template, whether or not this Repeating Placeholder has been added to the template.

4. Click **Save Template**.

To delete a Nested Placeholder:

1. On the **Repeating Placeholder** pane, expand a Placeholder type and a Repeating Placeholder, and hover the cursor over a Nested Placeholder.
2. Click **Delete**.



3. A dialog box is displayed to confirm deletion. Click **OK** to confirm that you want to delete the Nested Placeholder. Click **Cancel** to retain the Nested Placeholder.

Note: Deleting a Nested Placeholder removes all instances of this Nested Placeholder from the template, whether or not this Nested Placeholder has been added to the template.

Fragments

Fragments can be created and inserted into document templates. Fragments can be composed of existing text and/or Microsoft Word objects, such as tables, images, bulleted lists, or numbered lists. Empty fragments can also be created. After fragments are saved to OnBase, they can be inserted into other templates by creating new **Document Fragment** Placeholders.

Note: Inserting fragments into tables is not supported.

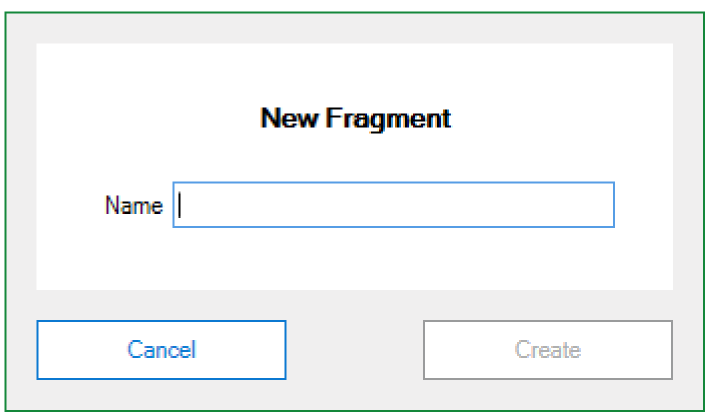
Note: Smart Tags are not supported. Text interpreted by Microsoft Word as a Smart Tag is not copied to the composed document.

Note: When a bullet list style is applied to a fragment, the bullet characters are displayed outside of the fragment.

Creating Document Fragments

To create a new fragment, select existing text and/or a Microsoft Word object if necessary:

1. Click **Create Fragment**.
2. The **New Fragment** dialog box is displayed:



3. Type a name for the fragment and click **Create**.

Note: Fragment names must be unique and are limited to 64 characters.

4. The fragment is displayed on the Word document:

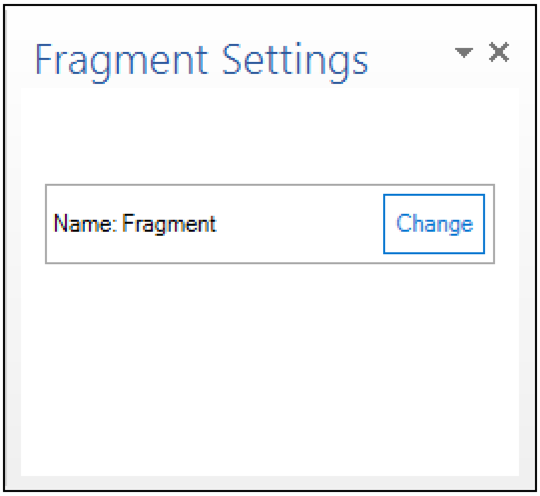
5. If you chose to create an empty fragment, type inside the space to create the fragment. If you created a fragment out of existing text or a Microsoft Word object, this text or object is displayed inside the fragment.
6. Edit the fragment if necessary, ensuring that the fragment is defined on a separate line.
7. Click **Save Template**.

Editing Document Fragments

Fragments that have been created and saved can be edited.

To edit a fragment:

1. Open the template containing the fragment that you want to edit.
2. Click the fragment.
3. The **Fragment Settings** pane is displayed:



4. Click **Change** to modify the fragment’s name in the **Fragment Name** dialog box.

Note: Fragment names must be unique and are limited to 64 characters.

5. Select the fragment and modify the content of the fragment.

Note: Inserting a fragment into itself or any dependent fragments is not supported. For example, fragment "HR - Offer" cannot be inserted into fragment "HR - Offer". Additionally, fragment "HR - Offer" cannot be inserted into fragment "Application Approved" if fragment "Application Approved" is inserted into fragment "HR - Offer".

6. Click **Save Template**.

Deleting Document Fragments

Fragments that have been created and saved can be deleted.

To delete a fragment:

1. Open the template containing the fragment that you want to delete.
2. Select the fragment on the template.
3. Click the fragment's tab:

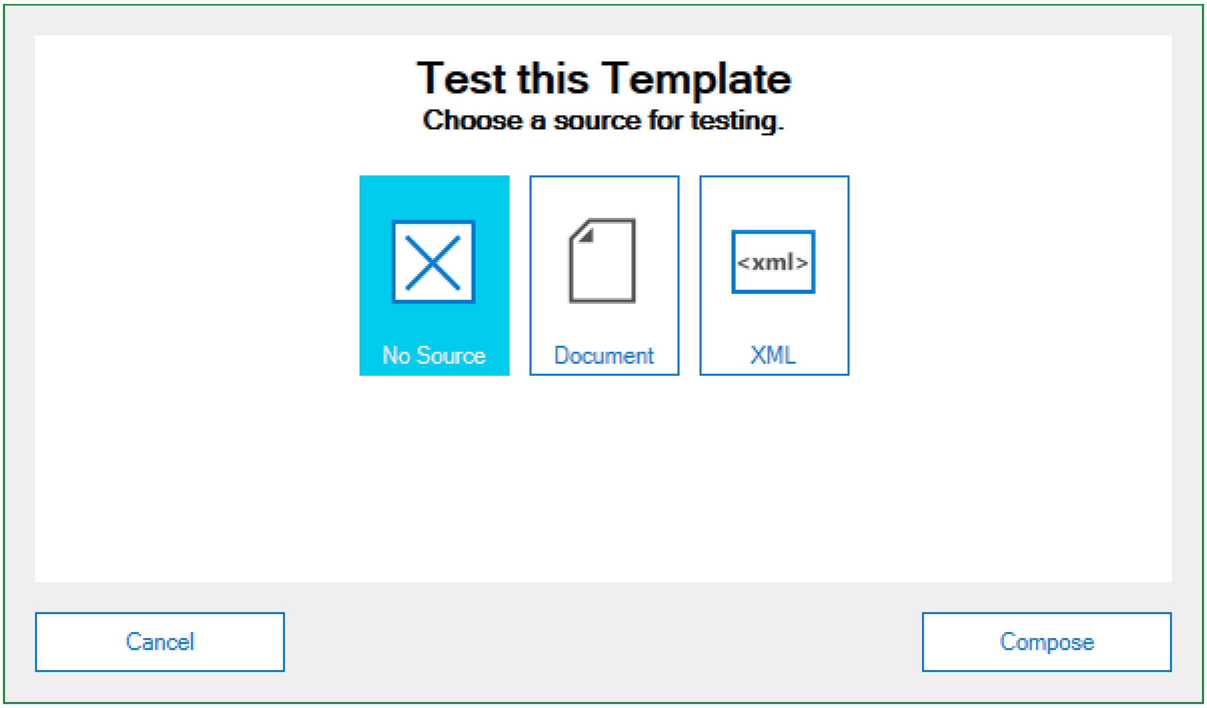
4. Press the **Delete** key.
5. The fragment is deleted from the template and from OnBase.
6. Click **Save Template**.

Testing Templates

Once a template has been created, configured, and saved, you can test it to verify that document creation functions correctly. When you test a template, all configuration settings, including User Prompts, are tested.

To test a template:

1. Open the template.
2. Click **Composition Preview**.
   The **Test this Template** dialog box is displayed.



3. Select one of the following:
   - **No Source** - Allows you to test the template as-is with no source document or XML.
   - **Document** - Allows you to test the template against a source document, which in turn can populate Placeholders that reference Keyword Types from the document. For more information on retrieving a source document, see Testing a Template with a Source Document on page 242.
   - **XML** - Allows you to test the template against source XML, which in turn can populate External Source Placeholders that reference XML. For more information on using source XML, see Testing a Template with Source XML on page 244.
4. Click **Finish**.

   The composed document is displayed. Configuration settings for populated Placeholders are automatically displayed as comments.

Note: Placeholders located in Headers and Footers will not display configuration settings, as comments cannot be added to Headers and Footers in Microsoft Word.

Note: Comments are not displayed for Nested Placeholders or for Placeholders composed within a Fragment or Repeating Placeholder.

Inspect the document to ensure the configured elements are displaying as expected.

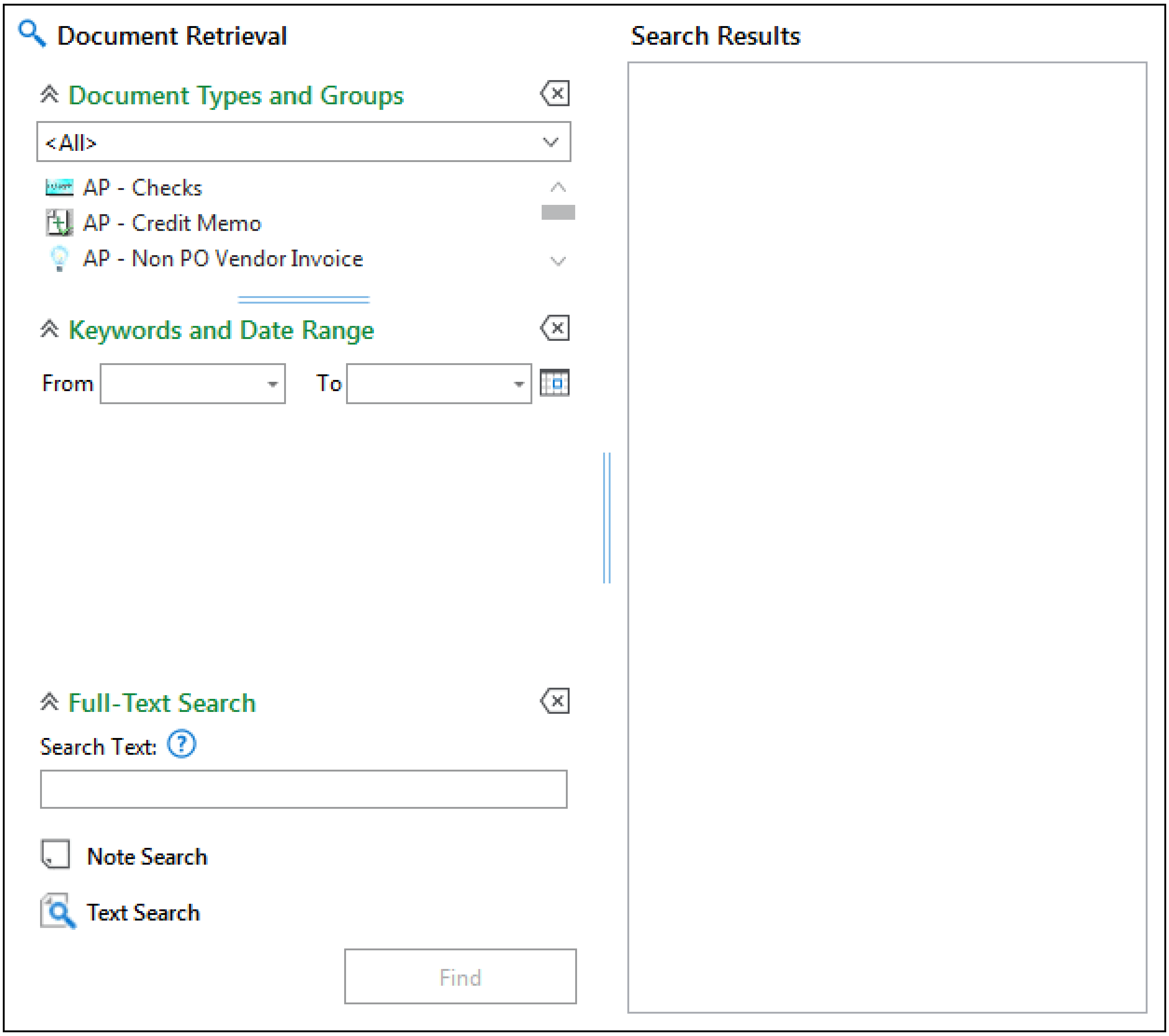
Testing a Template with a Source Document

The previous section describes the basic process for testing a template. To test a template with a source document:

1. From the **Test this Template** dialog box, select **Document** button.

   If a document has already been selected, the **Test this Template** dialog box contains the Auto-Name String of the source document. To use this same source document to test the template, skip to step 4. Click **Change Document** to change the source document that you will use to test the template.

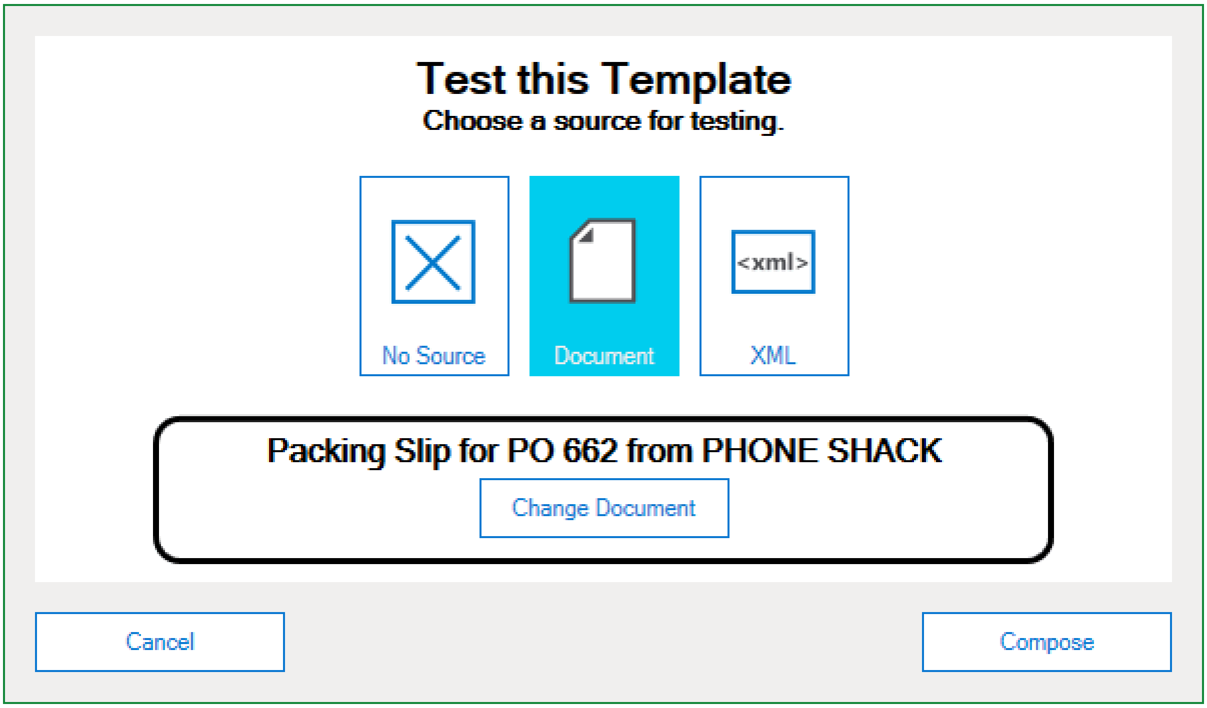
   The **Select Source Document** dialog box is displayed.



2. Retrieve a document to test document creation.

3. Double-click the document.

   The document Auto-Name String is displayed in the **Test this Template** dialog box.



4. Click **Finish**.

   The composed document is displayed. Configuration settings for populated Placeholders are automatically displayed as comments.

Note: Placeholders located in Headers and Footers will not display configuration settings, as comments cannot be added to Headers and Footers in Microsoft Word.

Note: Comments are not displayed for Nested Placeholders or for Placeholders composed within a Fragment or Repeating Placeholder.

Inspect the document to ensure the configured elements are displaying as expected.

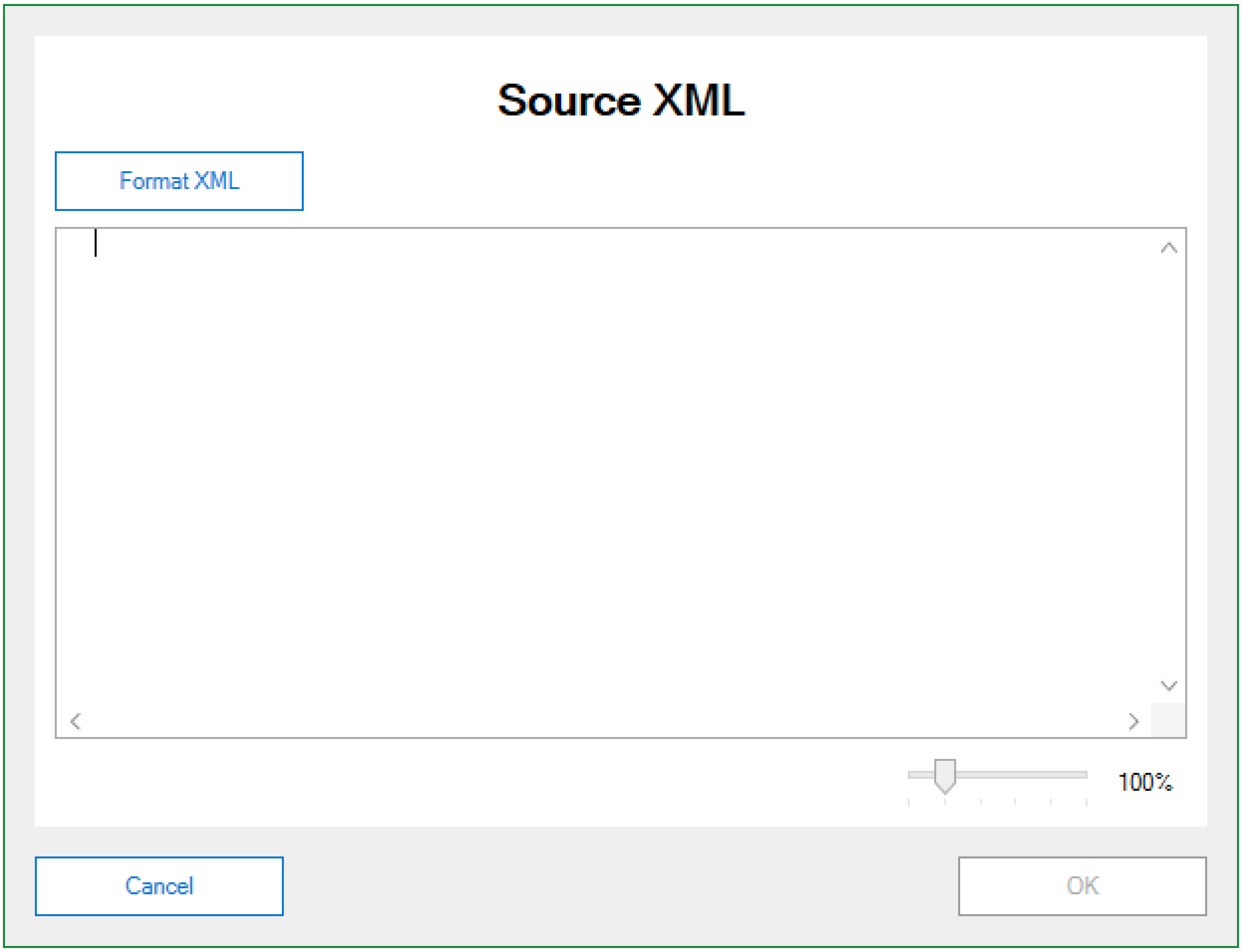
Testing a Template with Source XML

Testing Templates on page 240 describes the basic process for testing a template. To test a template with source XML:

1. From the **Test this Template** dialog box, select **XML** button.

   If source XML has already been entered, the **Test this Template** dialog box indicates XML source text is set. To use this same source XML to test the template, skip to step 5. Click **Edit Source** to change the source XML that you will use to test the template.

   The **Source XML** dialog box is displayed.



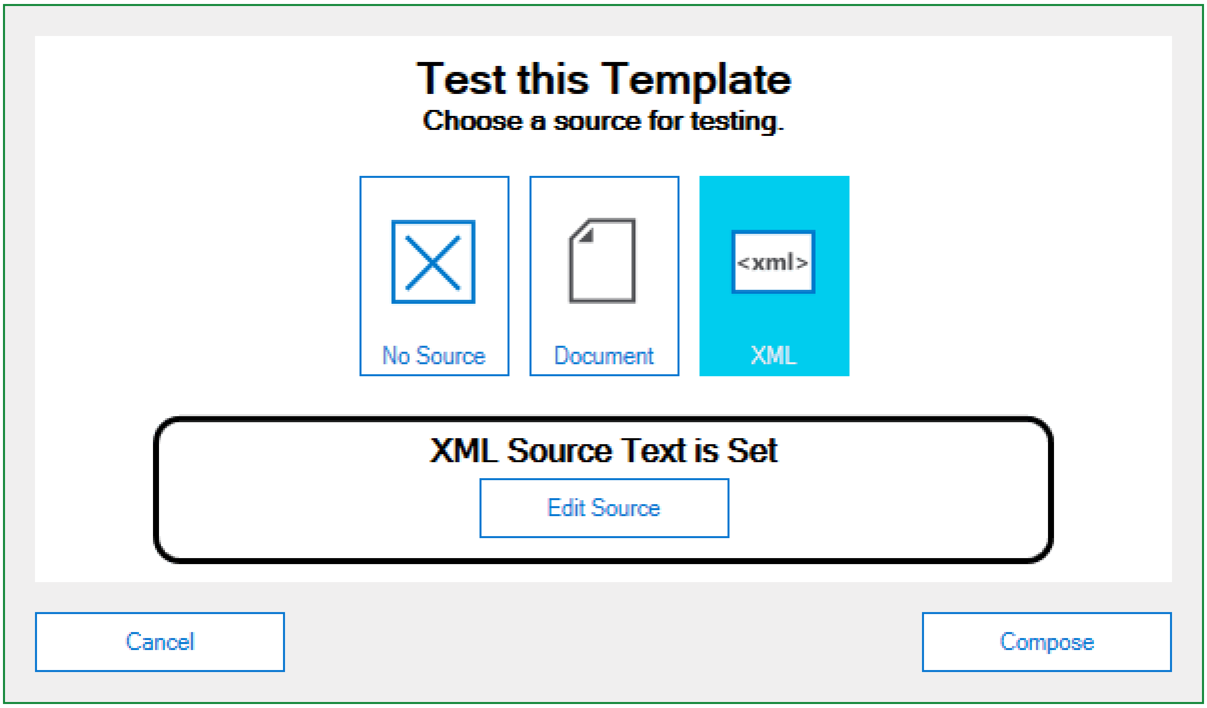
2. Enter the desired XML or edit existing XML as needed.
3. Click the **Format XML** button to standardize the spacing of the entered XML.

   This helps to make the XML easier to view. It does not add necessary characters to or remove unnecessary characters from the XML. This button can also be used to expand collapsed elements.

4. Click **OK**.

   The **Test this Template** dialog box indicates XML source text is set.

   You are notified if the XML you entered is invalid. If the XML is invalid, you are prompted to edit the XML you entered.



5. Click **Compose**.

   The composed document is displayed. Configuration settings for populated Placeholders are automatically displayed as comments.

Note: Placeholders located in Headers and Footers will not display configuration settings, as comments cannot be added to Headers and Footers in Microsoft Word.

Note: Comments are not displayed for Nested Placeholders or for Placeholders composed within a Fragment or Repeating Placeholder.

Inspect the document to ensure the configured elements are displaying as expected.

Note: Depending on your privileges, you may not be able to view the composed template. For example, you may not have rights to view certain Placeholders.

Enterprise Document Composition Configuration

Enterprise Document Composition automatically composes and stores documents in OnBase. A server runs a Document Composition Service that processes requests and stores the documents. Document Composition uses VBScripts or Workflow to automate the document creation process.

Configuring Templates for Use with Enterprise Document Composition

When configuring a template for use with Enterprise Document Composition:

- Avoid gathering critical data through anything that requires user interaction, such as a **User Prompt** Placeholder. If the template has **User Prompt** Placeholders on it, they will be removed from the document and ignored during Enterprise Document Composition.
- Use Keyword Mapping, either by applying the **Inherit Keywords from Source Document when possible** template option or by configuring Keyword Mapping on individual Placeholders.

For Enterprise Document Composition to successfully process and store documents, the template must be configured with the **Document Type for Composed Documents** setting enabled. If the template is configured without this setting enabled, the Document Type must be supplied by the calling script or Workflow action.

Making Enterprise Document Composition Requests

Enterprise Document Composition requests are made through Workflow's **Compose Document** action, scripting, or the Unity API. Requests can be synchronous or asynchronous. Asynchronous requests are queued in the database, which is polled by the Document Composition Service. Synchronous requests are processed immediately. It then sends the composed document back to the Application Server, which archives the document into OnBase.

Note: For more information on making Enterprise Document Composition requests through the Unity API or scripting, contact your first line of support.

Although synchronous and asynchronous requests are processed in the same manner, there are distinct differences between the two:

- Synchronous requests are processed immediately after they are received. Requests are not returned until the document has been created and archived. Synchronous requests are intended for processes in which the user is required to view or modify the document or metadata before continuing. Synchronous requests are queued in the order they are received. If too many synchronous requests exist in the queue, the service call may time out and the Client may not receive the response.
- The Document Composition Service records the request and returns it immediately. The response only indicates whether or not the request was successfully recorded. Any errors in the actual processing are recorded in the Enterprise Document Composition error log. Asynchronous requests are intended for less interactive processes, such as a nightly batch process. There is no limit to the number of asynchronous requests that can be queued for processing.

Configuring the Document Composition Service

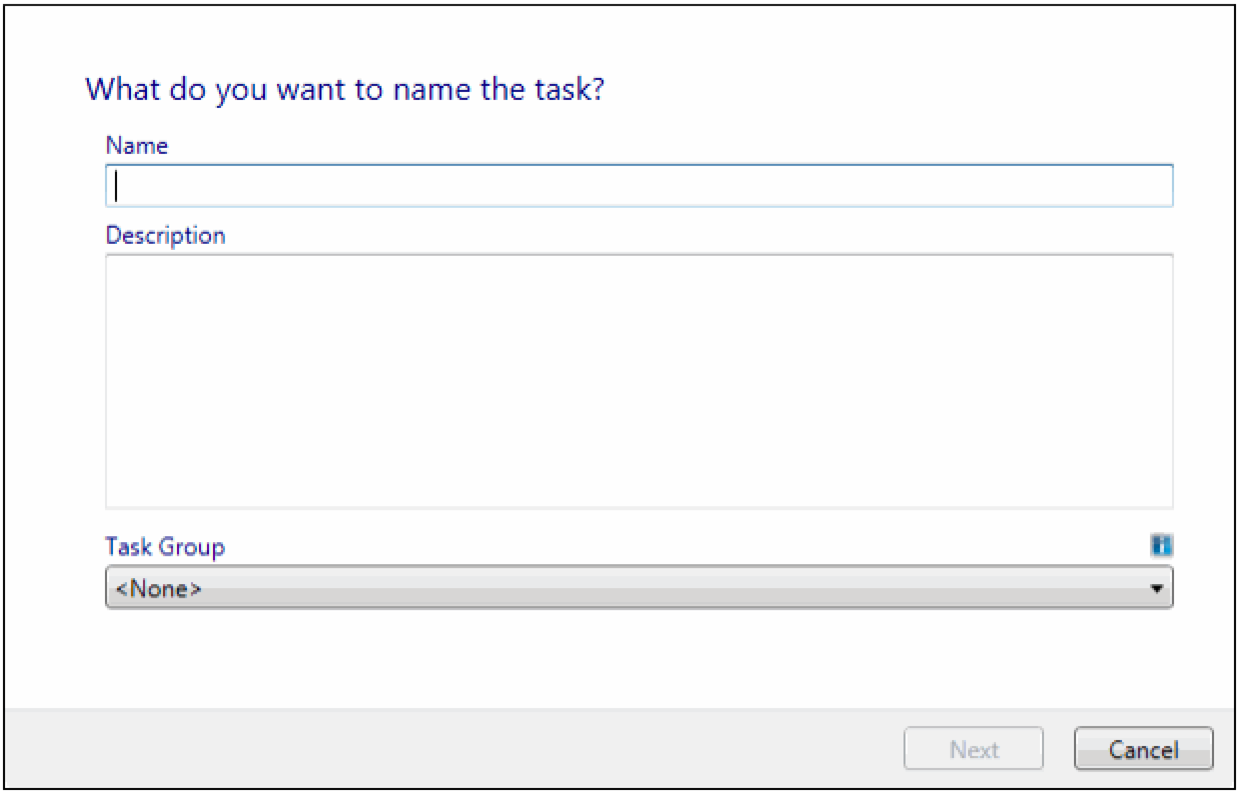
In order for the Document Composition Service to function properly, a corresponding **Document Composition** Unity Scheduler task must be created and configured.

The following sections provide general instructions for creating Unity Scheduler tasks in the Unity Management Console. For more information on the Unity Scheduler, see the **Unity Scheduler** module reference guide.

Creating Tasks

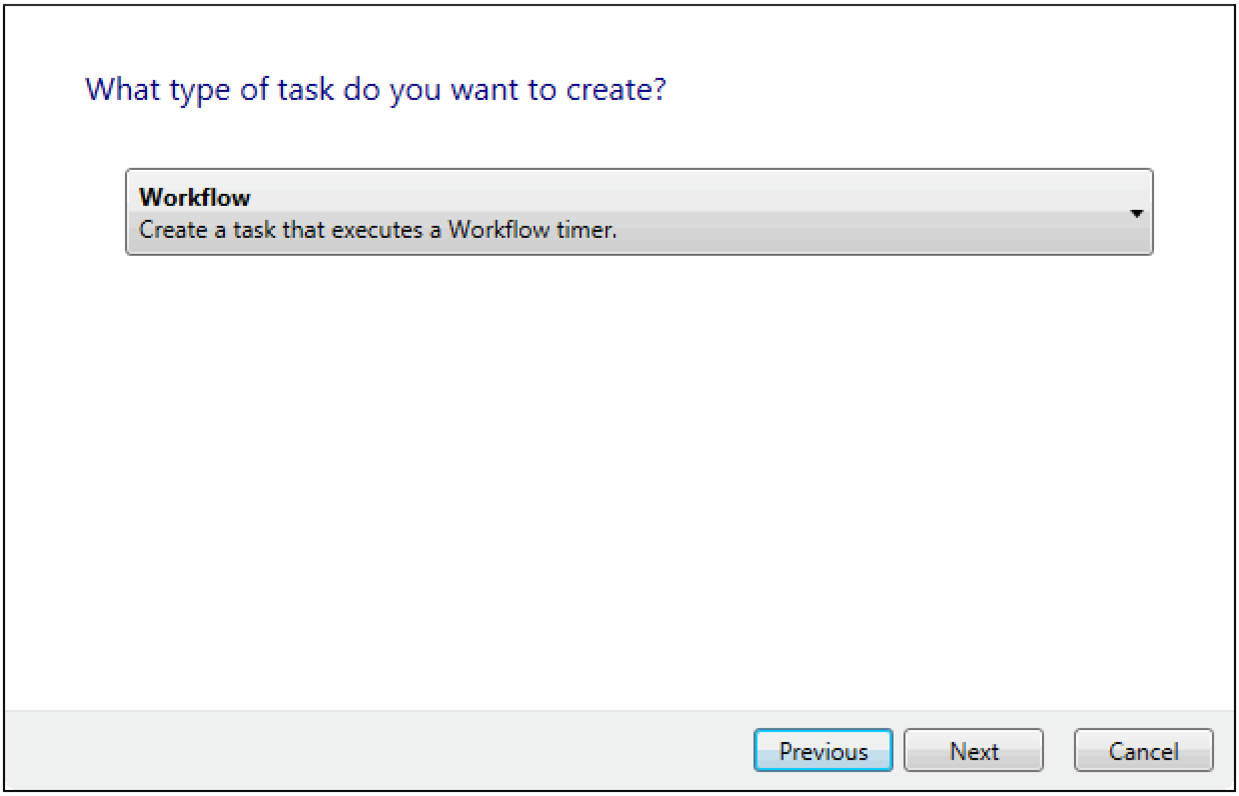
To create a task:

1. In the **Console** tree, select the task scheduler for which you want to add a task.
2. Right-click and select **Create Task**, or select **Create Task** in the **Action** pane.
   The **Task Wizard** is displayed.



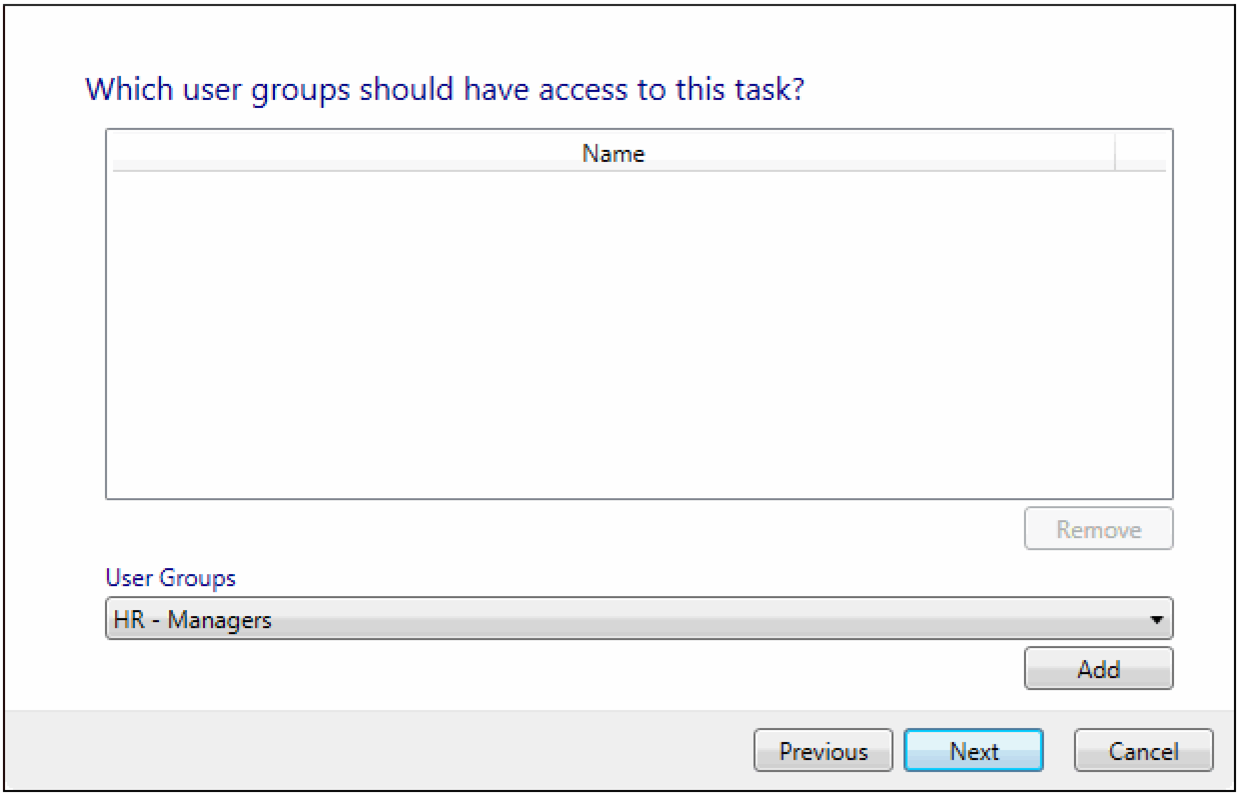
3. Enter a unique name for the task in the **Name** field.
4. Enter a description for the task in the **Description** field.
5. Select a task group from the **Task Group** drop-down list. Existing task groups are available for selection. If **<None>** is selected, the task is added to the **<Unassigned>** task group.

6. Click **Next**. The **Task Type Selection** page is displayed.



7. Select **Document Composition** from the drop-down list.
8. Complete the process in the next section, Configuring Tasks on page 250.

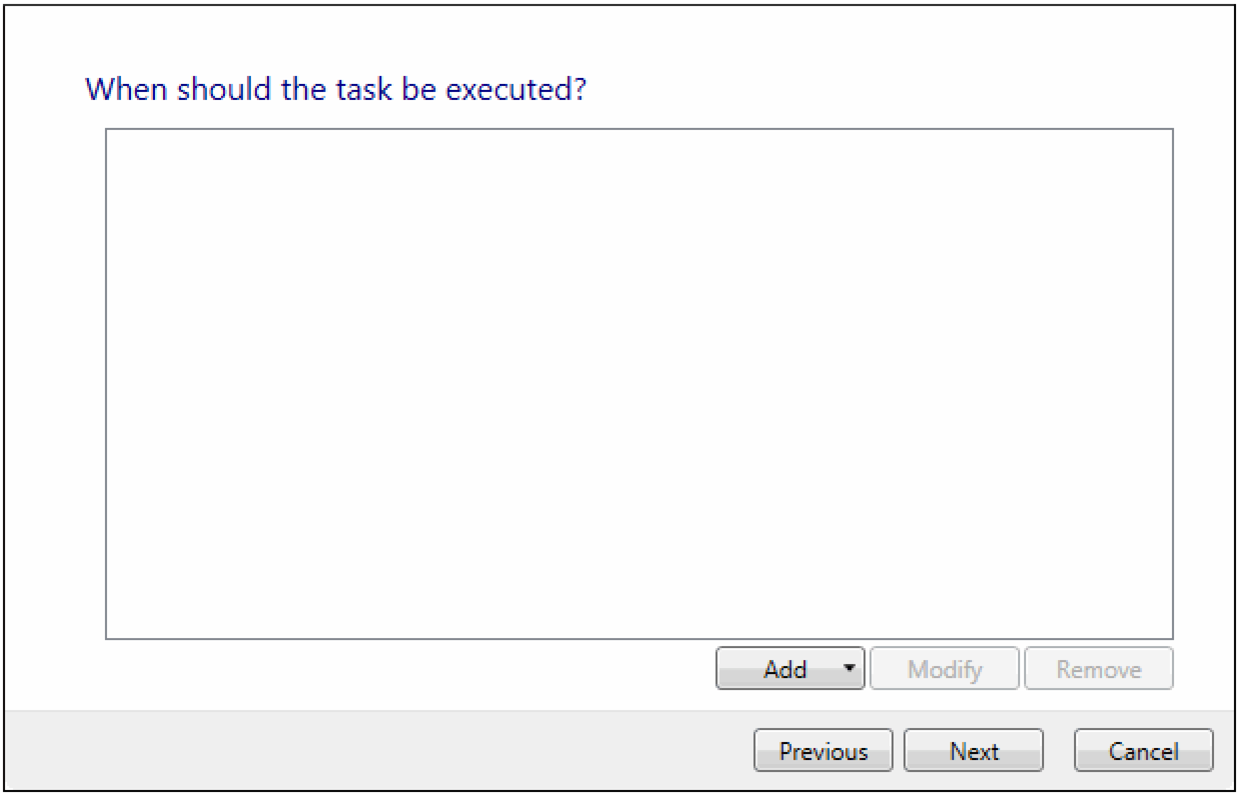
Configuring Tasks



1. Configure the user groups that will have access to manage this task. Select a user group from the **User Groups** drop-down list, then click **Add**.

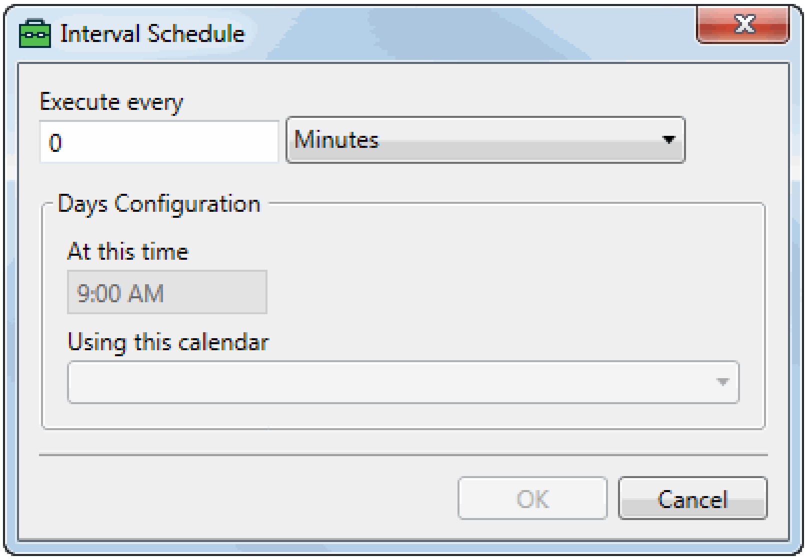
   To remove a group, select it from the list, then click **Remove**.

2. Click **Next**.


When should the task be executed?
Add
Modify
Remove
Previous
Next
Cancel

3. Click the **Add** drop-down list to choose a schedule for the task. Select one of the following options:
   - **Interval** - Executes the task once for every specified interval. For example, the task can be scheduled to execute once every two hours.

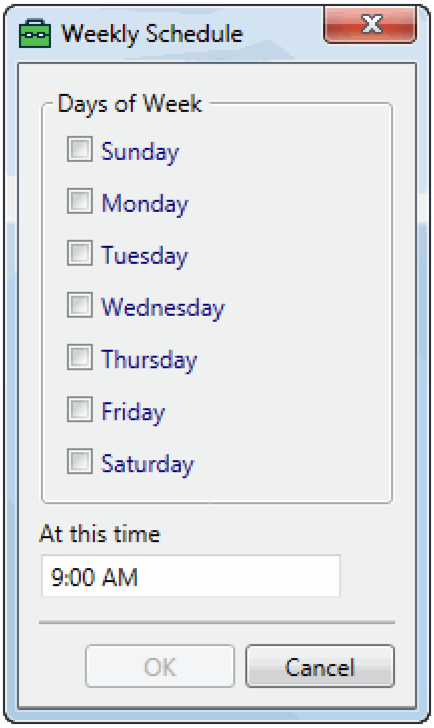
     The **Interval Scheduler** dialog box is displayed:

     Enter a numerical value in the **Execute every** field, then choose a unit of time in the drop-down list. If **Days** or **Business Days** is selected, enter a time in the **At this time** field to determine at what time in the day the task should execute. If **Business Days** is selected, select a calendar in the **Using this calendar** drop-down list to specify the calendar that defines business days. Click **OK**.

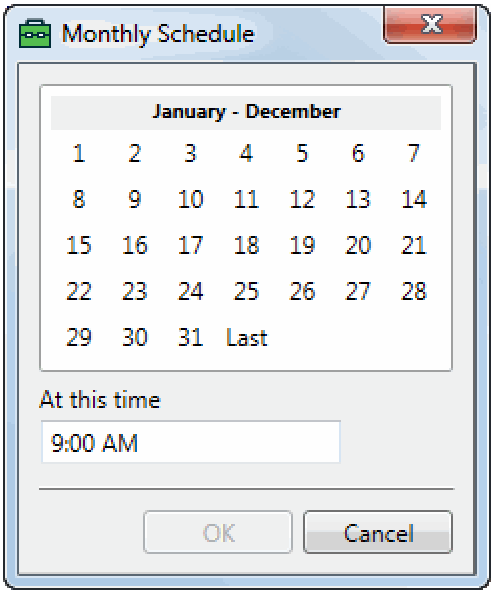
Note: If the **Using this calendar** drop-down list is unpopulated, a calendar has not yet been configured. For more information about configuring calendars, see the Org Charts and Calendars section of the **Workflow** module reference guide.

- **Weekly -** Executes the task every week at a specified time. The **Weekly Schedule** dialog box is displayed:



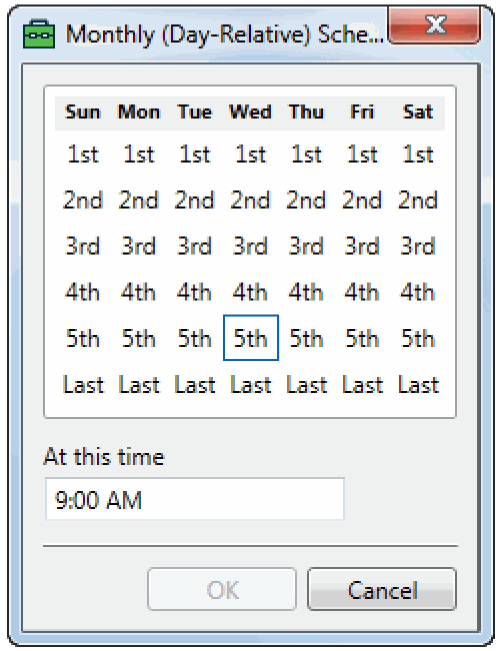
Select the days of the week on which you want this task to execute every week. Enter a time in the **At this time** field to specify the time of day this task should execute, then click **OK**.

- **Monthly** - Executes the task every month at a specified time. The **Monthly Schedule** dialog box is displayed:



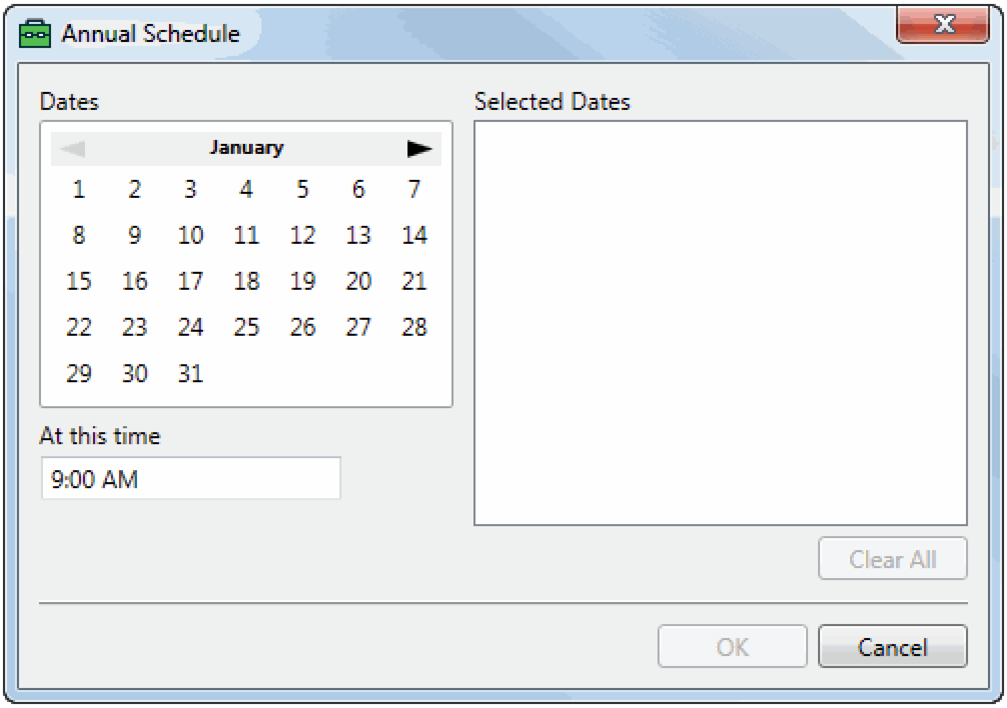
Select the dates on which you want this task to execute every month. Multiple dates can be selected. Select **Last** to schedule the task to execute on the last day of every month. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

- **Monthly (Day-Relative)** - Executes the task every month on either the first, second, third, fourth, or last instance of a specific day of the week. The **Monthly (Day-Relative) Schedule** dialog box is displayed:



Under the preferred day of the week, select whether you want this task to run on the 1st, 2nd, 3rd, 4th, 5th, and/or last instance of that day in the month. More than one selection can be made; for example, you can choose to schedule this task for both the 1st and 3rd Friday of every month). Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

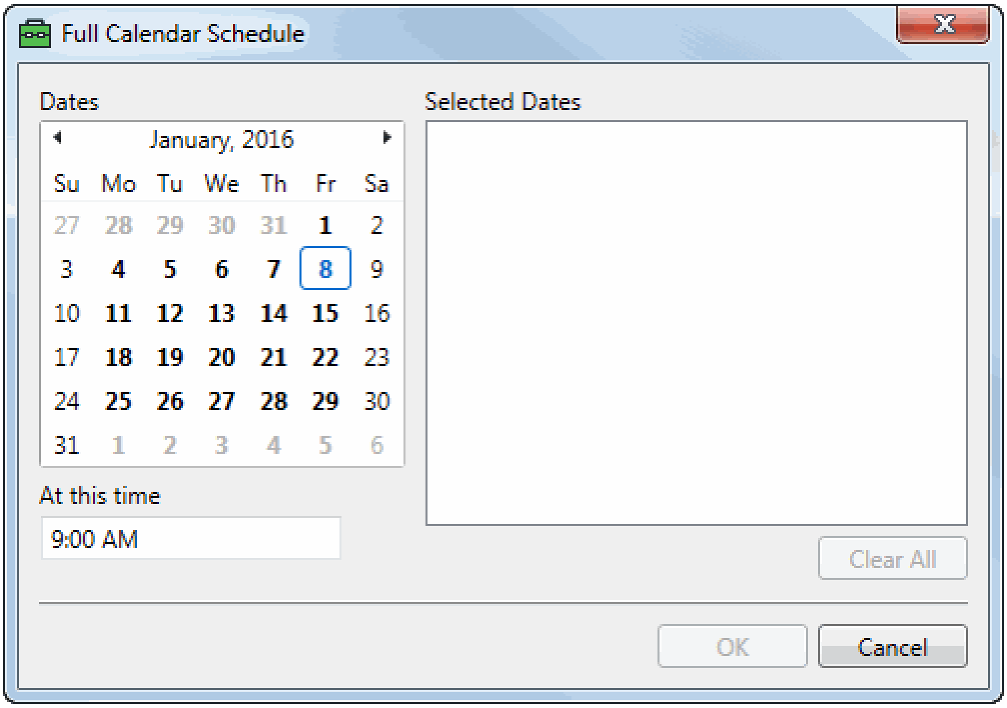
- **Annual -** Executes the task every year on a specified date. The **Annual Schedule** dialog box is displayed:



Select the date on which this task should execute every year. Multiple dates can be selected. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

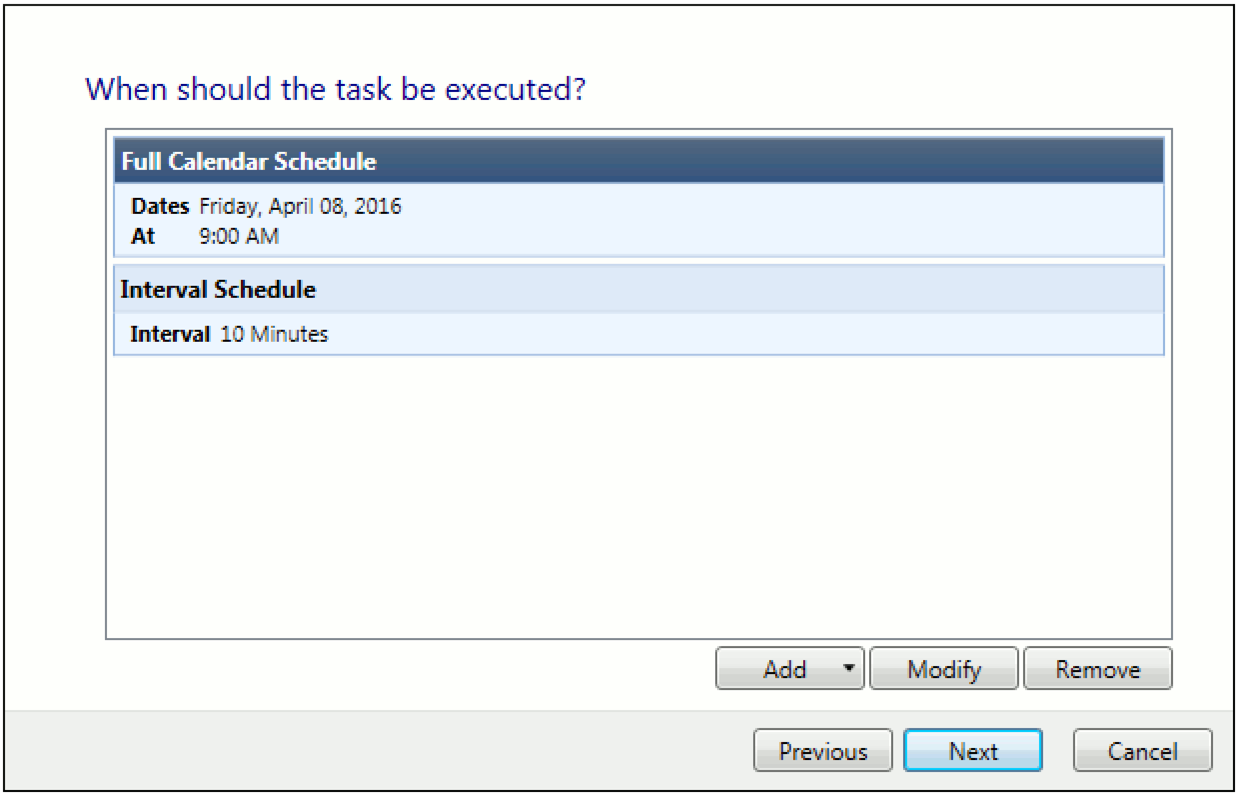
Note: The month of February also contains the **Last** option, so that the task can be scheduled to run on the last day of February every year, regardless of whether or not it is a leap year.

- **Full Calendar** - Executes the task on specific dates in a year. The **Full Calendar Schedule** dialog box is displayed:

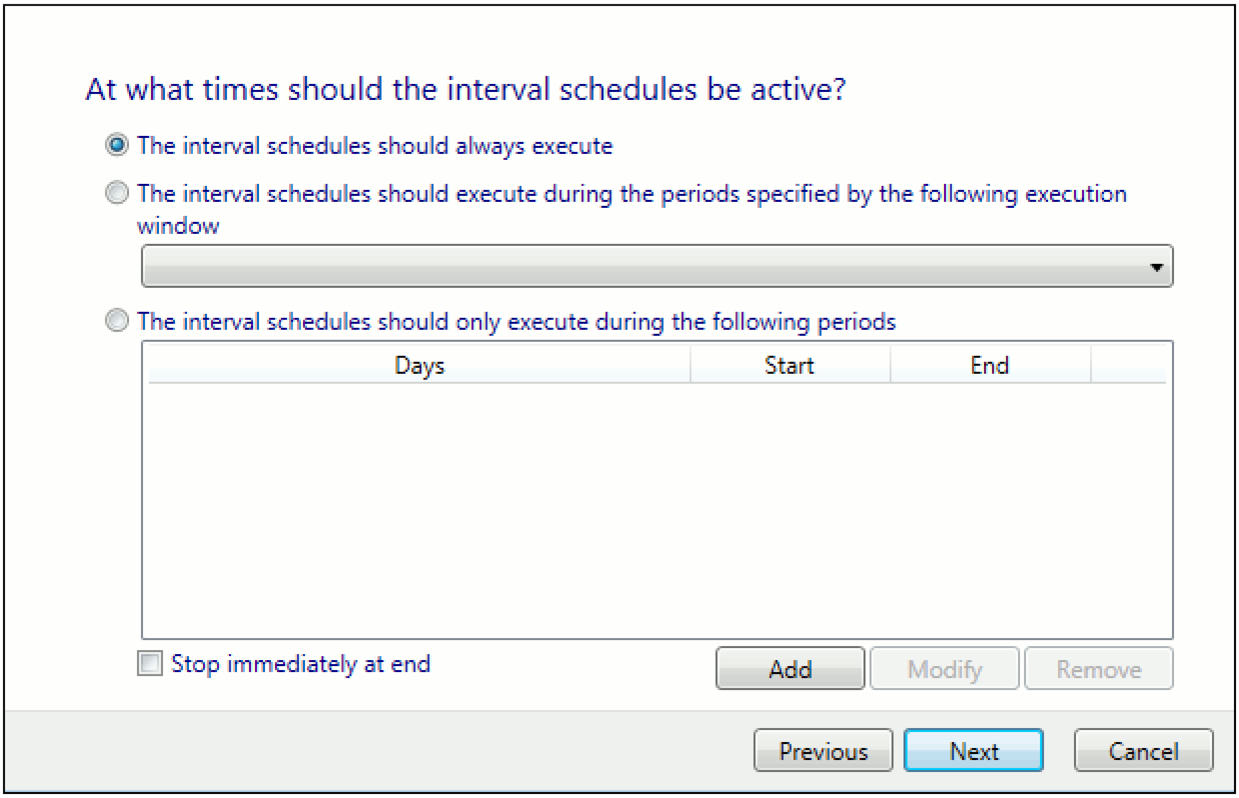


  Select the dates on which the task should execute. To select multiple dates, press and hold **Ctrl** while making your selections. To select multiple consecutive dates, select the first date, press and hold **Shift**, then select the last consecutive date. You can remove all of your selected dates by clicking **Clear All**. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.
- **Existing Schedule** - Choose an existing named schedule that determines when the task should execute.

The configured schedules are added to the list.


When should the task be executed?
Full Calendar Schedule
Dates Friday, April 08, 2016
At 9:00 AM
Interval Schedule
Interval 10 Minutes
Add
Modify
Remove
Previous
Next
Cancel

4. Click **Next**. If you added one or more interval schedules, the following dialog box is displayed.

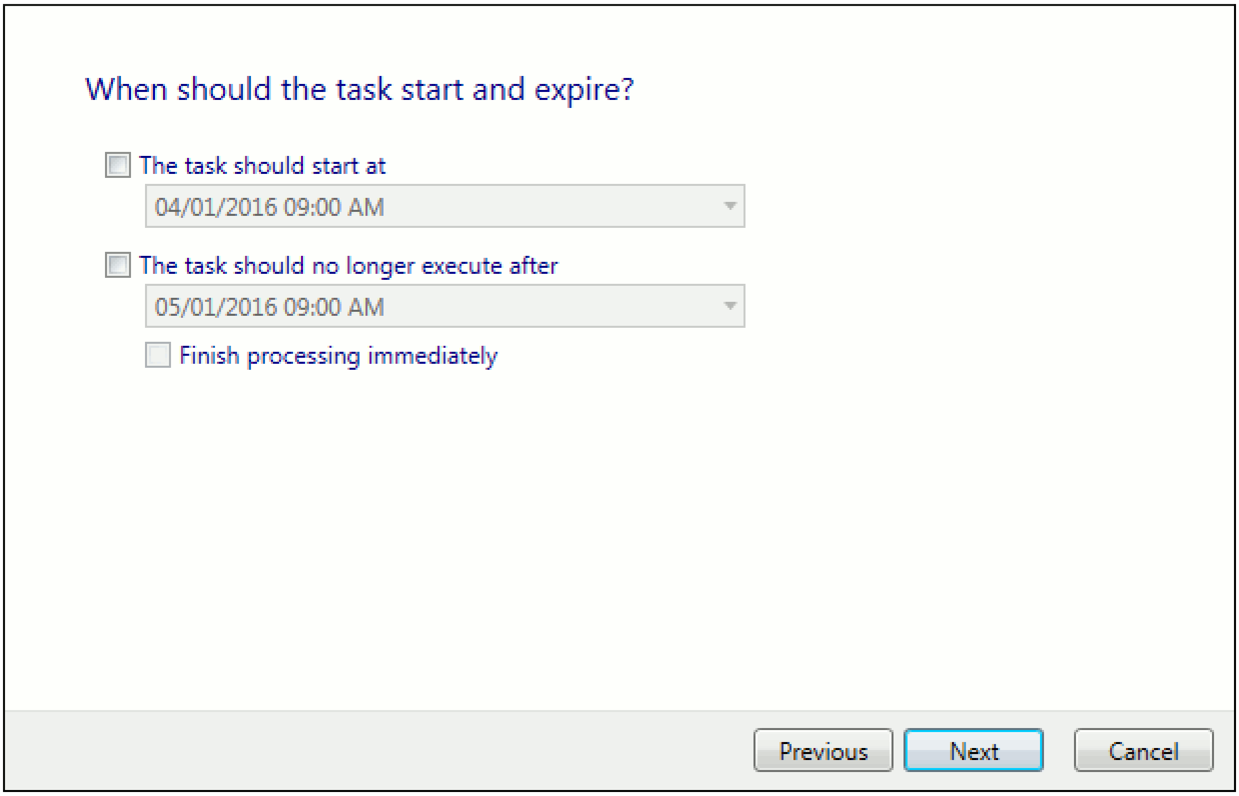


5. Select from the following options to determine when the interval schedules should execute:

Option	Description
The interval schedules should always execute	The interval schedules always execute at their configured times. For example, if an interval schedule is configured for 30 minutes, the interval schedule executes every 30 minutes without restriction.
The interval schedules execute during the periods specified by the following execution window	The interval schedules only execute during the days and times configured within the specified execution window. For example, if an interval schedule is configured for 30 minutes, and the execution window is Saturday, 9 a.m. until 5 p.m., the interval schedule executes at 9 a.m. on Saturday and every 30 minutes until 5 p.m. that Saturday. From the drop-down list, select the appropriate execution window.
The interval schedules should only execute during the following periods	The interval schedules only execute during the time periods configured within the ad hoc execution window. To create an ad hoc execution window, click the **Add** button. Select the days of the week and the time period the interval schedule should be run. Continue adding time periods as necessary. To abort task execution after the ad hoc execution window reaches the end of a time period, select the **Stop immediately at end** option. This makes it so that at the end of a time period, the schedule finishes processing the current item and stops. **Note:** Unity Script scheduler tasks must be written to specifically support the ability to stop immediately.

Note: Interval schedules are run at the earliest allowed time and then continue running for the configured intervals. For example, if an interval schedule is set for 10 minutes, and it begins on the current day, the next run time for the schedule is the time you finish configuration in the Task Wizard. The schedule then runs every 10 minutes for the duration of the specified time period.

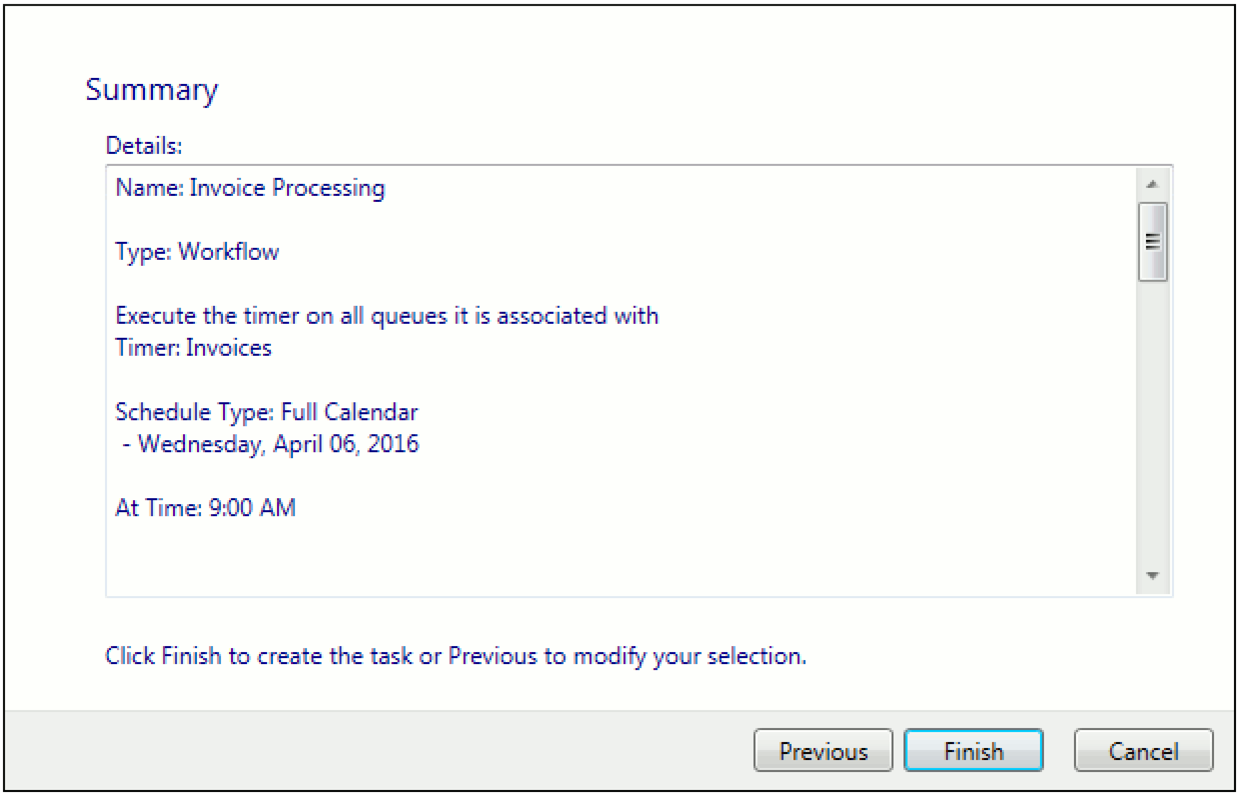
6. Click **Next**.



7. To set a specific start time, expiration time, or both, select from the following options:

Option	Description
The task should start at	Select to set a specific start time for the task. Enter or select the appropriate date and time.
The task should no longer execute after	Select to set a specific end time for the task. Enter or select the appropriate date and time.
Finish processing immediately	When selected, the task ends at its earliest opportunity after the end time passes. When deselected, the task ends after the end time passes and the entire task is completed. **Note:** This option is only enabled when **The task should no longer execute after** option is selected.

8. Click **Next**. The summary of your configuration is displayed.



9. Click **Finish** to save the task.

Maintenance

Reports containing performance information for Document Composition can be generated in the Unity Management Console. See the **Unity Scheduler** module reference guide for more information.

System Interaction

Agenda

If you are upgrading from OnBase 15 or earlier, Agenda Placeholders and templates are no longer supported or available in Document Composition. This includes the ability to configure Agenda Placeholders, to generate documents from previously created Agenda templates, and to retrieve Agenda templates created in Document Composition.

For more information on how to configure Agenda templates, see the **Agenda** module reference guide.

Application Enabler

Application Enabler can be used to create documents with Document Composition in the Unity Client. For more information, see the Application Enabler documentation.

Diagnostics Service and Diagnostics Console

The Diagnostics Console can log information from the Document Composition Service. To enable logging, open the **Hyland.Office.DocumentComposition.NTService.exe.config** file and modify the settings between **<Logs>** and **</Logs>**. For information on these settings, see the Diagnostics Service and Diagnostics Console documentation.

Exporting and Importing

Document Composition configuration items can be exported and imported using OnBase Configuration, OnBase Studio, or the Document Composition Template Builder. For more information on exporting and importing using the Template Builder, see Exporting and Importing on page 22.

Note: Export packages can only be imported using the OnBase Configuration module or using the module from which they were exported.

Configuration

In OnBase Configuration, in addition to the configuration items listed in the **System Administration** module reference guide, the following Document Composition configuration items can be exported and imported:

- Document Composition ODBC Inputs
- Document Composition Templates

Note: Disabled Document Composition Templates cannot be exported.

When importing an export package, additional associated configuration items may require decisioning.

For more information, see the **System Administration** module reference guide.

Studio

In OnBase Studio, in addition to the configuration items listed in the **Studio** module reference guide, the following Document Composition configuration items can be exported and imported:

- Document Composition ODBC Inputs
- Document Composition Templates

Note: Disabled Document Composition Templates cannot be exported.

When importing an export package, additional associated configuration items may require decisioning.

In OnBase Studio, Document Composition templates and ODBC inputs associated with a life cycle can be exported and imported when that life cycle is exported and imported. When exporting and importing life cycles that contain Document Composition configuration items, note the following:

- Dependent templates will also be exported. If a field is configured on a template that references another template, the referenced template will also be exported.
- The library that an exported template belongs to will also be exported as a placeholder for the exported template. The entire library is not exported. Only those templates within that library that are referenced by the associated Workflow actions are exported.
- The import and export of templates are done for the whole template. All fields configured on the template will be included, and the user will not have the option of selectively adding or removing fields during the import/export process. ‘Attribute’ type fields configured on a template will not be exported.
- Image field types configured on a template always reference a specific document by their document handle, so both the Document Type and the specific document itself are exported. If this Document Type is not present in the destination system during the import, you can Map, Replace, or create a new Document Type. If you create a new Document Type during the import, it will be created without a Disk Group configured, and the import of the actual image file document will fail.
- For a template to be exported with the Compose Document action, the action must be configured with **Use Specified Template** option selected.
- User groups assigned to the template are exported with the template.

For more information on exporting and importing life cycles, see the **Workflow** module reference guide.

For more information on exporting and importing in OnBase Studio, see the **Studio** module reference guide.

Workflow

The document creation process can be automated by the Workflow **Compose Document** action. Users requiring high throughput should contact their OnBase solution provider for details on the Enterprise Document Composition license.

Note: When using the HTML-only Web Client with Microsoft Internet Explorer, users are unable to preview or edit documents when using the **Compose Document** Workflow action.

Additionally, when you import a Workflow and any associated Document Composition templates, the templates are imported in to OnBase without a User Group assigned. The MANAGER User Group always has rights to modify Document Composition templates.

Note: If one or more Keywords are created in the system as a result of importing a template with Workflow, reset the cache in the Configuration module so that the Keywords are available on the imported template.

Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

Note: For more information on actions, see the Workflow module reference guide or help file.

Compose Document Action

Note: This action requires a Document Composition license.

Note: This action is supported only in the Core-based OnBase Client, Web Client, and Unity interfaces.

Creates a document from the specified template.

Note: This action can be executed on a WorkView object.

Option: Document Composition Template

Choose one of the following options to determine what template is used:

- To use a specific template, select the appropriate template from the **Use Specified Template** drop-down list.
- To prompt the user to select a template when the action is executed, select **Select Template at Runtime**.

Note: Select Template at Runtime cannot be used when **Use Automated Document Generation** is configured because this option requires user interaction.

Note: Select Template at Runtime will select and disable **View Document After Archiving** on the **Select Template Option** dialog box when composing a document.

- Select **Template from Keyword** to select a template from a Keyword Value. The Keyword Value must contain a template name or template ID. From the drop-down list, select the Keyword in which the template ID is stored.
- Select **Template from Property** to select a template from a property value. The property value must contain a template name or template ID. Enter the property name in which the template ID is stored.

Option: Use All Settings Configured for Template

You can choose to adhere to the configured settings of the template by selecting **Use All Settings Configured for Template**.

Option: Override Template Settings

You can override the configured settings of the template by selecting **Override Template Settings with the Following:** and configure settings at the action level. Manual settings will override template settings.

Note: In order to enable the **Storage Options**, the **Override Template Settings with the Following:** option must be selected. In order to enable **Disable Import Dialog**, both **Inherit Keywords From Fields** and **Force Document Type** must be checked.

For more information on settings, see the section on general settings in the **Document Composition** module reference guide or help file.

You can copy all of the settings of the current template to the override settings by clicking **Copy All Options from Template**.

Configuring the Action to Not Prompt for Template Selection

If you want the action to be initiated without prompting the user to select the template that should be used, you must configure the action settings (when **Override Template Settings with the Following** is selected) or the templates settings in the following way:

- **Force Preview** must be deselected.
- **Force Document Type** must be selected and a Document Type must be selected from the drop-down list.

- **Inherit Keywords From Fields** must be selected.
- **Disable Import Dialog** must be selected.

Note: If the template selected in the **Document Composition Template** drop-down list has a Document Type configured, the **Force Document Type** drop-down list will have the **<Document Type from Template>** option. When this option is selected, the action will use the Document Type configured for the template.

Option: Use Automated Document Generation

If you have a Composition Server installed and configured and you want to use Automated Document Generation, check the **Use Automated Document Generation** option to allow composition processing to be sent to a Composition Server and not require any user interaction. Once selected, **Asynchronous Processing** and **Synchronous Processing** options are available. Select either **Asynchronous Processing** or **Synchronous Processing** depending on your processing needs related to the action. See the section on making Enterprise Document Composition requests in the Document Composition documentation for more information on Asynchronous and Synchronous requests.

In order to successfully use the **Use Automated Document Generation** option, you must select a **Document Composition Template** and a **Force Document Type** from the drop-down list. When the **Use Automated Document Generation** option is selected, the following options are automatically selected and cannot be modified: **Override Template Settings with the Following**, **Inherit Keywords From Fields**, **Force Document Type**, and **Disable Import Dialog**.

Note: If the **Use Automated Document Generation** option is not selected and the action is not properly configured for Automated Document Generation, this action is not supported in System work or Timer work.

WorkView

In the Web Client, the document creation process can be initiated from an open object by clicking the Documents drop-down button and selecting **Compose** in the WorkView module. For more information, see Creating a Document on page 324.

Note: When using the HTML-only Web Client with Microsoft Internet Explorer, users are unable to preview or edit documents composed from a WorkView object using the **Compose** button.

In the Unity Client, the document creation process can be initiated from an open object by clicking **Compose** from the object's main tab. The document creation process can also be initiated from one or more selected objects in a filter by clicking **Compose Document** from the **Filter** tab. For more information, see Creating a Document on page 329.

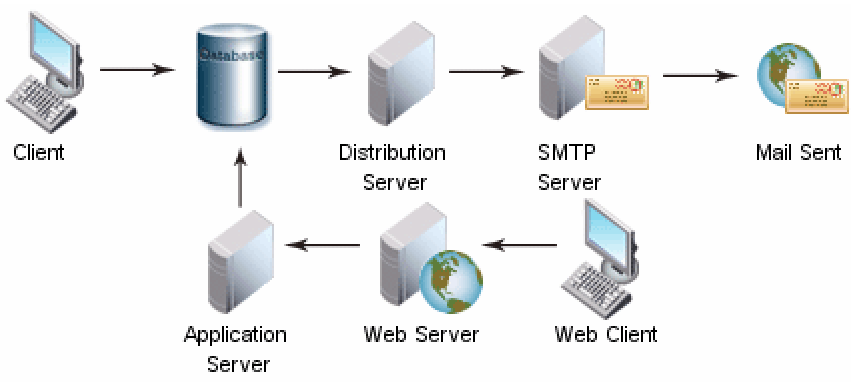
You can create Placeholders from WorkView objects and WorkView filters. For more information, see Creating Placeholders on page 133.

For more information about WorkView functionality, see the WorkView documentation.

Overview

The Distribution Service is a Core Services component that integrates with several OnBase modules, allowing email notifications to be sent through a centralized mail service. All installation and configuration settings are located on one workstation as opposed to several workstations. This provides high security, control, and easy maintenance.

The Distribution Service process is depicted in the following illustration. The process begins when OnBase Client applications send system notifications to the database. The Distribution Service polls the database on a configured interval and composes an email when it receives a new notification. The service then sends the email to an SMTP server, where it is distributed externally to all users who are configured to receive notifications from modules that use the Distribution Service. When OnBase documents are attached to these emails, attachment names reflect the documents' Auto-Name strings in OnBase.



The Distribution Service can run on a machine separate from that of the Application Server.

Using the Distribution Service with Document Distribution

If you are upgrading from a version of OnBase prior to OnBase 15, and you are using the Distribution Service with Document Distribution, new configuration steps are required. If your system is configured with the Global Client Setting **Use Email Distribution Service for Document Distribution** enabled, a temporary file cache must be configured and associated with the Distribution Service.

See Configuring a Temporary File Cache on page 289 for more information.

Note: When the **Use Email Distribution Service for Document Distribution** setting is enabled and the **-STMTMAILSRVR** switch is applied to the OnBase Client shortcut, the OnBase Client will not check for bounce backs.

Configuration

There are several items that need to be configured to allow the Distribution Service to function properly. These items include:

- Configuring the Email Sending Unity Scheduler Task on page 269
- Enabling the Distribution Service on page 284
- Users Configuration Requirements on page 285
- Configuring Test Mode on page 286
- Adding Support for Multiple Data Sources on page 287
- Displaying the User Who Triggered the Notification as the Sender on page 296
- Configuring EML Transfer Encoding on page 288
- Configuring EML Transfer Encoding on page 288
- Sending Notifications in HTML Format on page 289
- Sending Unity Forms on page 289
- Configuring a Temporary File Cache on page 289
- Configuring Retry Settings on page 293
- Configuring Maximum Recipients on page 294
- Configuring Default Sender Options on page 295
- Configuring Attachment Options on page 296
- Configuring Email Server Settings on page 298
- Generating and Sending Test Notifications on page 300

Note: If you are using multiple databases, each database must have the Distribution Service Settings configured individually.

Configuring the Email Sending Unity Scheduler Task

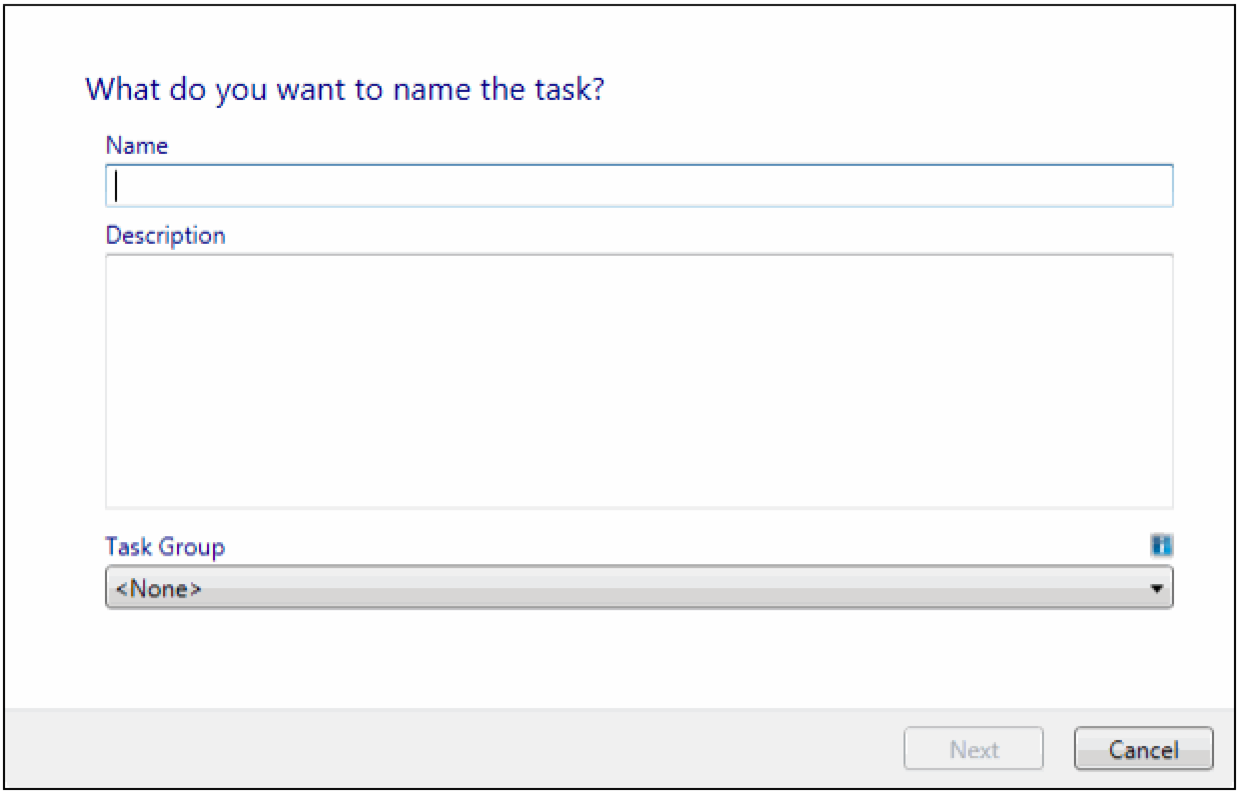
In order for the Distribution Service to function properly, a corresponding **Email Sending** Unity Scheduler task must be created and configured.

The following sections provide general instructions for creating Unity Scheduler tasks in the Unity Management Console. For more information on the Unity Scheduler, see the **Unity Scheduler** module reference guide.

Creating Tasks

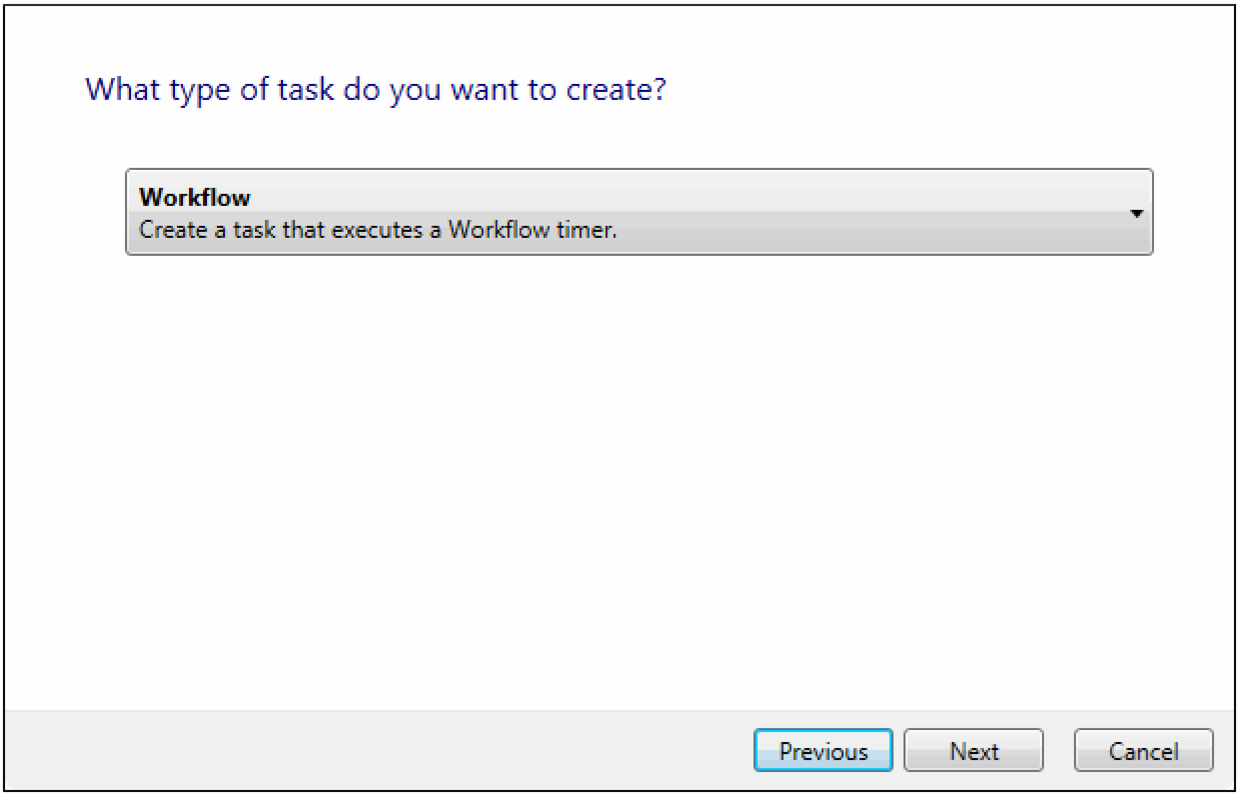
To create a task:

1. In the **Console** tree, select the task scheduler for which you want to add a task.
2. Right-click and select **Create Task**, or select **Create Task** in the **Action** pane.
   The **Task Wizard** is displayed.



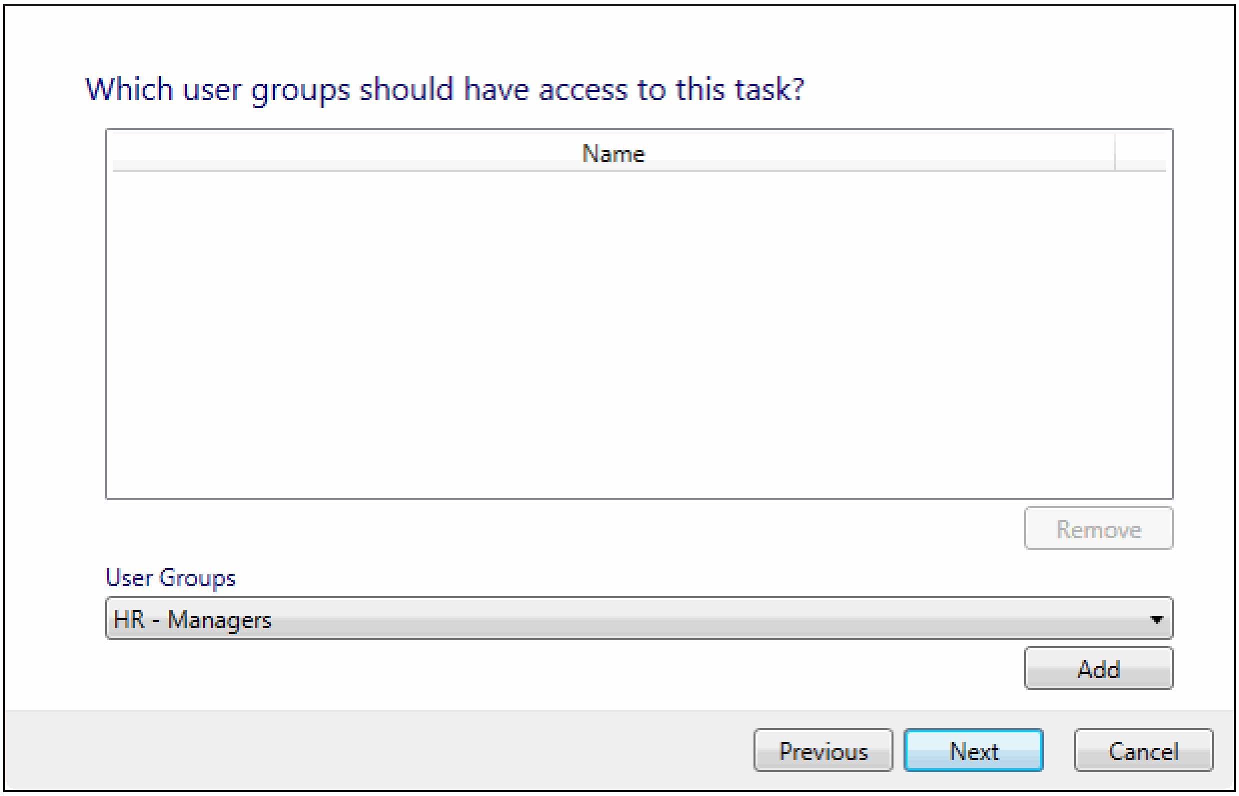
3. Enter a unique name for the task in the **Name** field.
4. Enter a description for the task in the **Description** field.
5. Select a task group from the **Task Group** drop-down list. Existing task groups are available for selection. If **<None>** is selected, the task is added to the **<Unassigned>** task group.

6. Click **Next**. The **Task Type Selection** page is displayed.



7. Select **Email Sending** from the drop-down list.
8. Complete the process in the next section, Configuring Tasks on page 272.

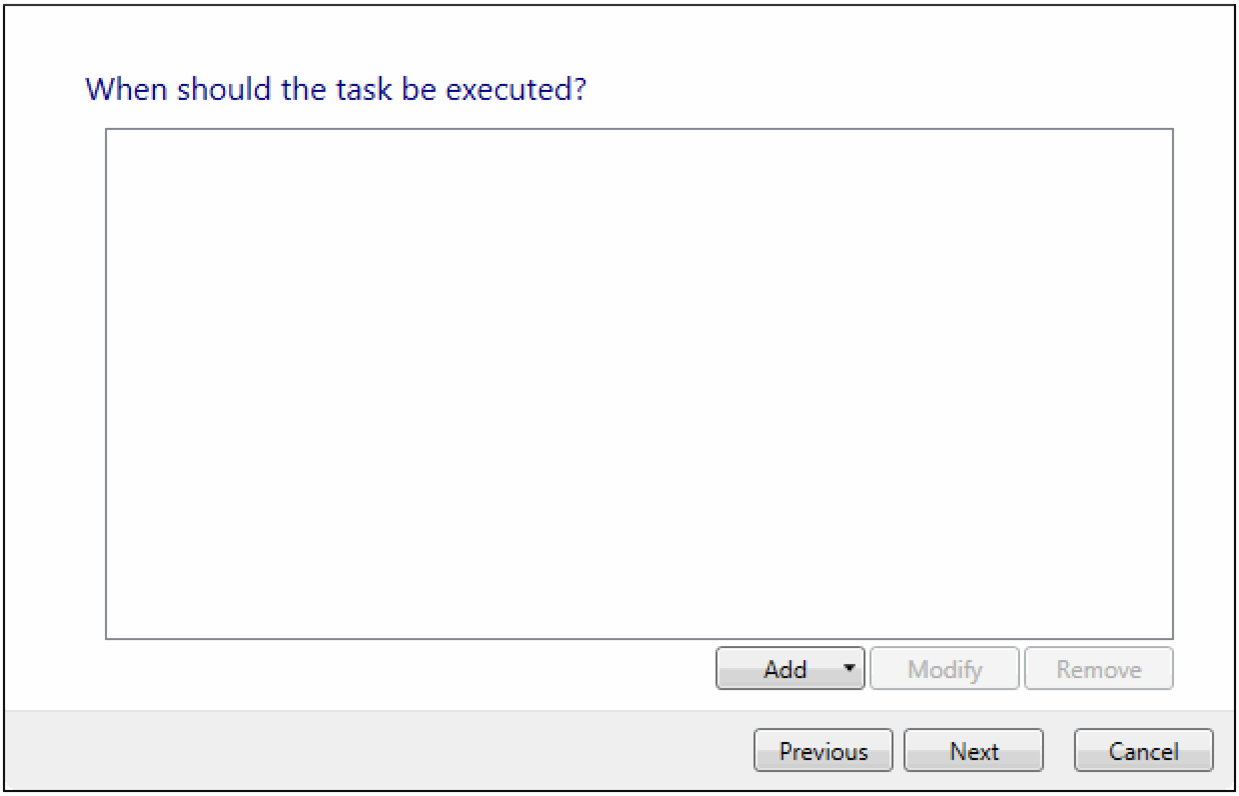
Configuring Tasks



1. Configure the user groups that will have access to manage this task. Select a user group from the **User Groups** drop-down list, then click **Add**.

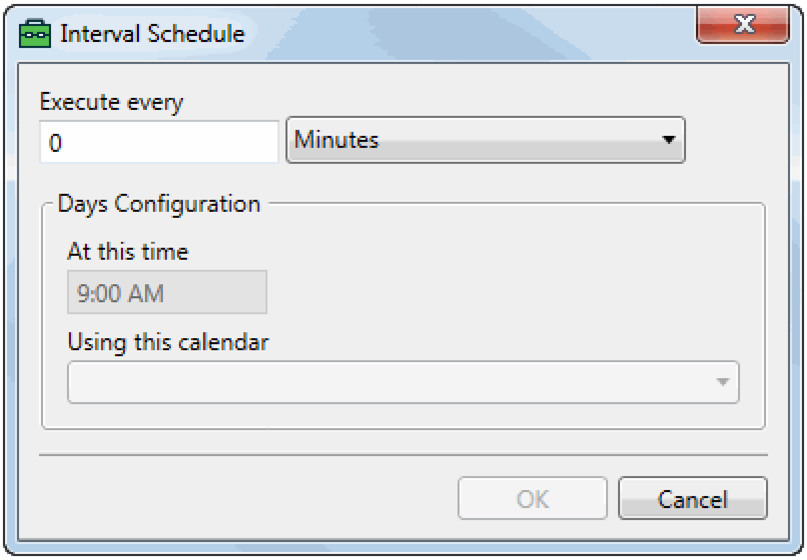
   To remove a group, select it from the list, then click **Remove**.

2. Click **Next**.


When should the task be executed?
Add
Modify
Remove
Previous
Next
Cancel

3. Click the **Add** drop-down list to choose a schedule for the task. Select one of the following options:
   - **Interval** - Executes the task once for every specified interval. For example, the task can be scheduled to execute once every two hours.

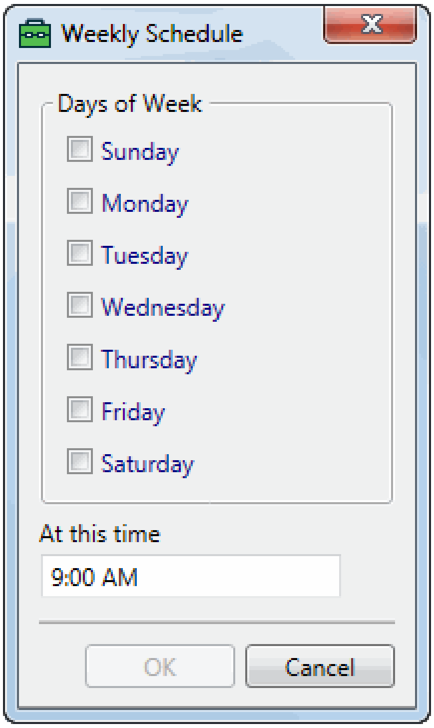
     The **Interval Scheduler** dialog box is displayed:



     Enter a numerical value in the **Execute every** field, then choose a unit of time in the drop-down list. If **Days** or **Business Days** is selected, enter a time in the **At this time** field to determine at what time in the day the task should execute. If **Business Days** is selected, select a calendar in the **Using this calendar** drop-down list to specify the calendar that defines business days. Click **OK**.

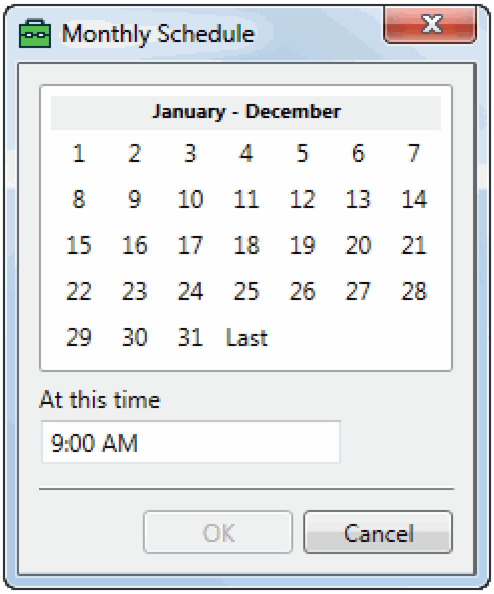
Note: If the **Using this calendar** drop-down list is unpopulated, a calendar has not yet been configured. For more information about configuring calendars, see the Org Charts and Calendars section of the **Workflow** module reference guide.

- **Weekly -** Executes the task every week at a specified time. The **Weekly Schedule** dialog box is displayed:



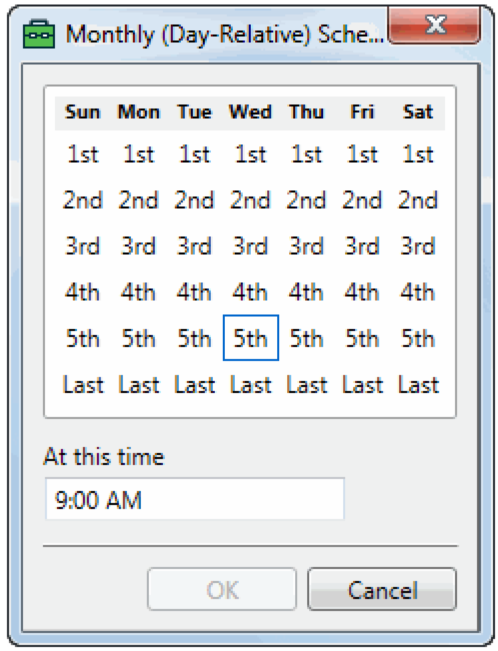
Select the days of the week on which you want this task to execute every week. Enter a time in the **At this time** field to specify the time of day this task should execute, then click **OK**.

- **Monthly** - Executes the task every month at a specified time. The **Monthly Schedule** dialog box is displayed:



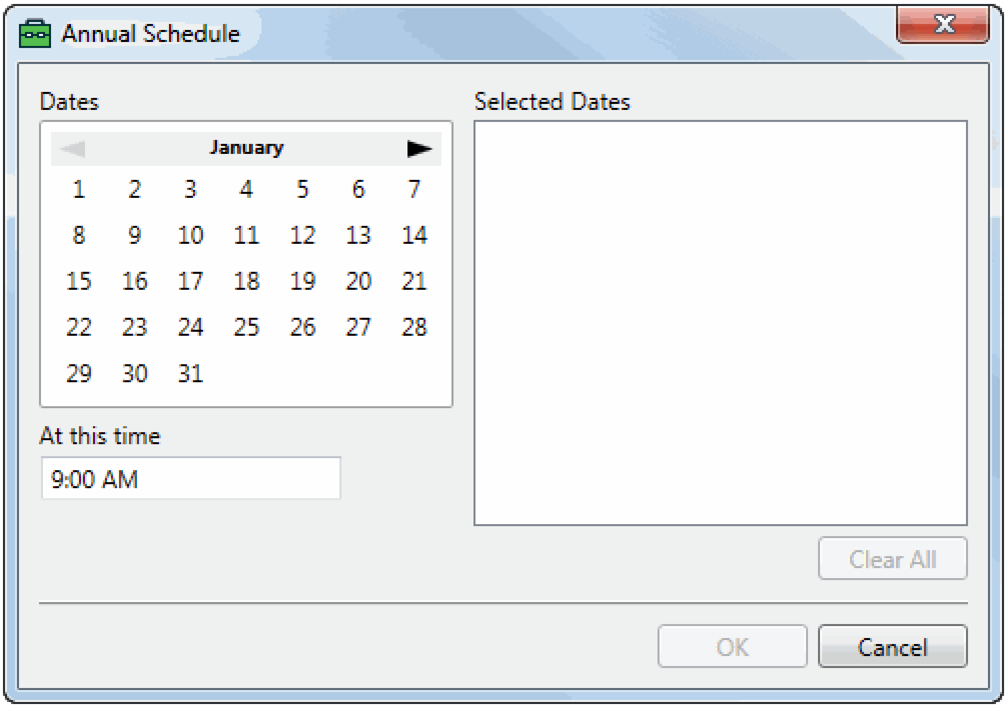
Select the dates on which you want this task to execute every month. Multiple dates can be selected. Select **Last** to schedule the task to execute on the last day of every month. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

- **Monthly (Day-Relative)** - Executes the task every month on either the first, second, third, fourth, or last instance of a specific day of the week. The **Monthly (Day-Relative) Schedule** dialog box is displayed:



Under the preferred day of the week, select whether you want this task to run on the 1st, 2nd, 3rd, 4th, 5th, and/or last instance of that day in the month. More than one selection can be made; for example, you can choose to schedule this task for both the 1st and 3rd Friday of every month). Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

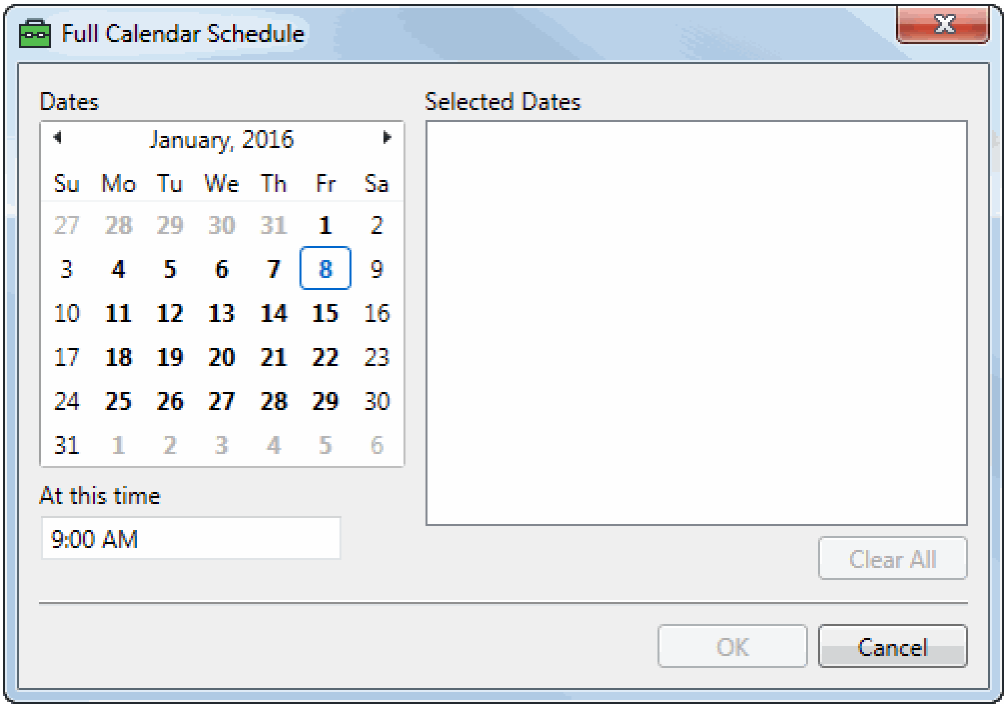
- **Annual -** Executes the task every year on a specified date. The **Annual Schedule** dialog box is displayed:



Select the date on which this task should execute every year. Multiple dates can be selected. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

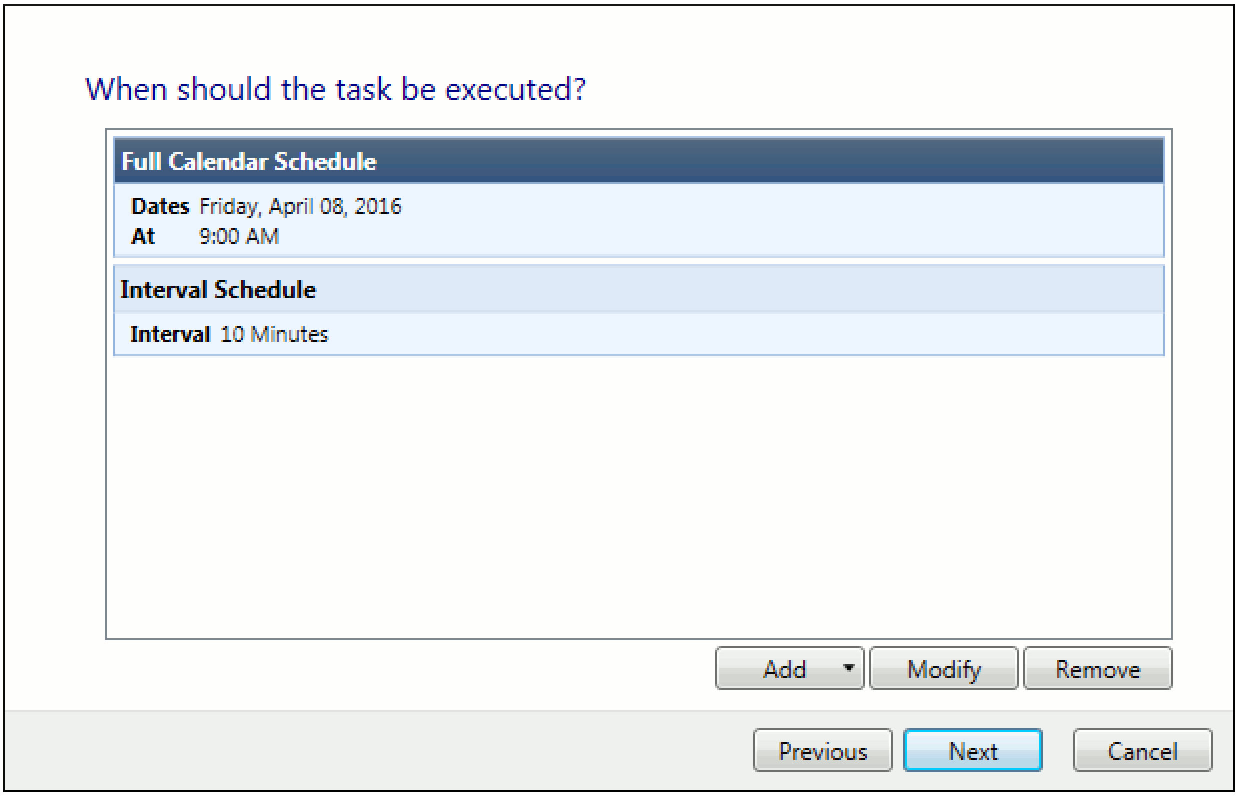
Note: The month of February also contains the **Last** option, so that the task can be scheduled to run on the last day of February every year, regardless of whether or not it is a leap year.

- **Full Calendar** - Executes the task on specific dates in a year. The **Full Calendar Schedule** dialog box is displayed:

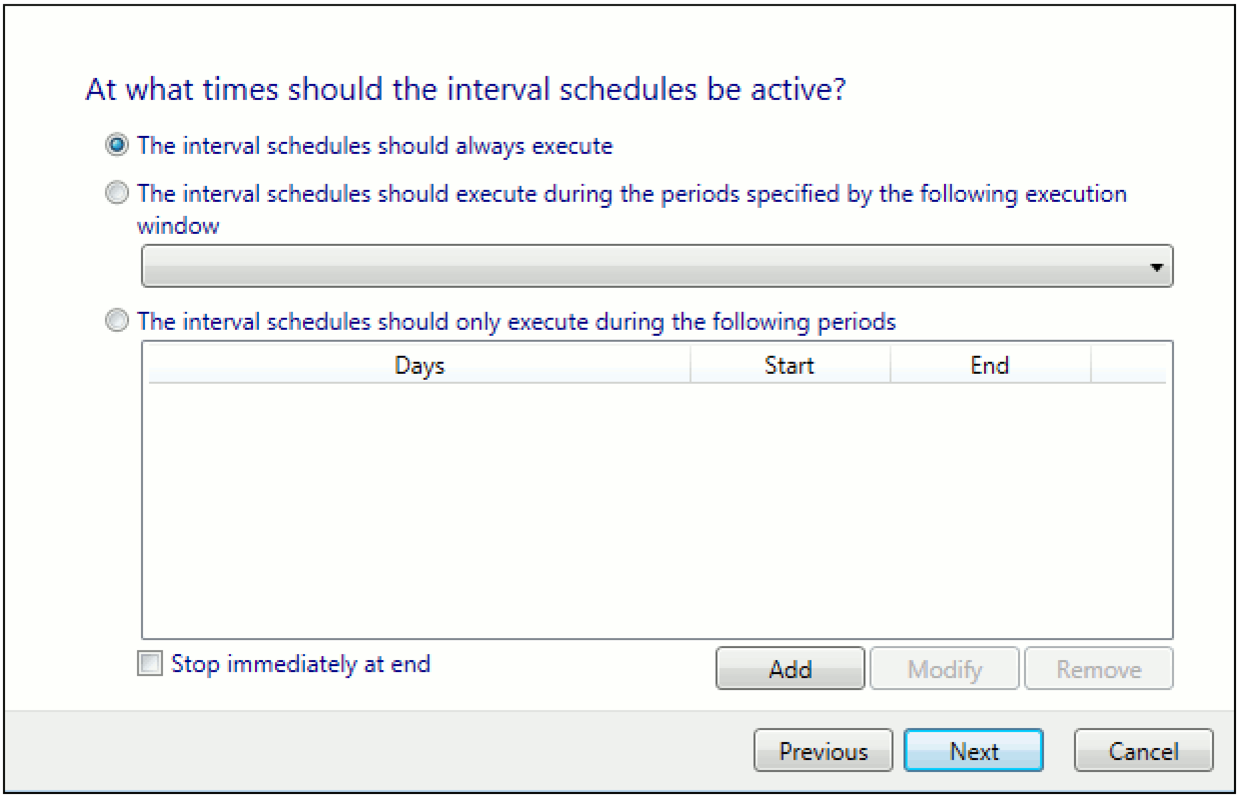


  Select the dates on which the task should execute. To select multiple dates, press and hold **Ctrl** while making your selections. To select multiple consecutive dates, select the first date, press and hold **Shift**, then select the last consecutive date. You can remove all of your selected dates by clicking **Clear All**. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.
- **Existing Schedule** - Choose an existing named schedule that determines when the task should execute.

The configured schedules are added to the list.


When should the task be executed?
Full Calendar Schedule
Dates Friday, April 08, 2016
At 9:00 AM
Interval Schedule
Interval 10 Minutes
Add
Modify
Remove
Previous
Next
Cancel

4. Click **Next**. If you added one or more interval schedules, the following dialog box is displayed.

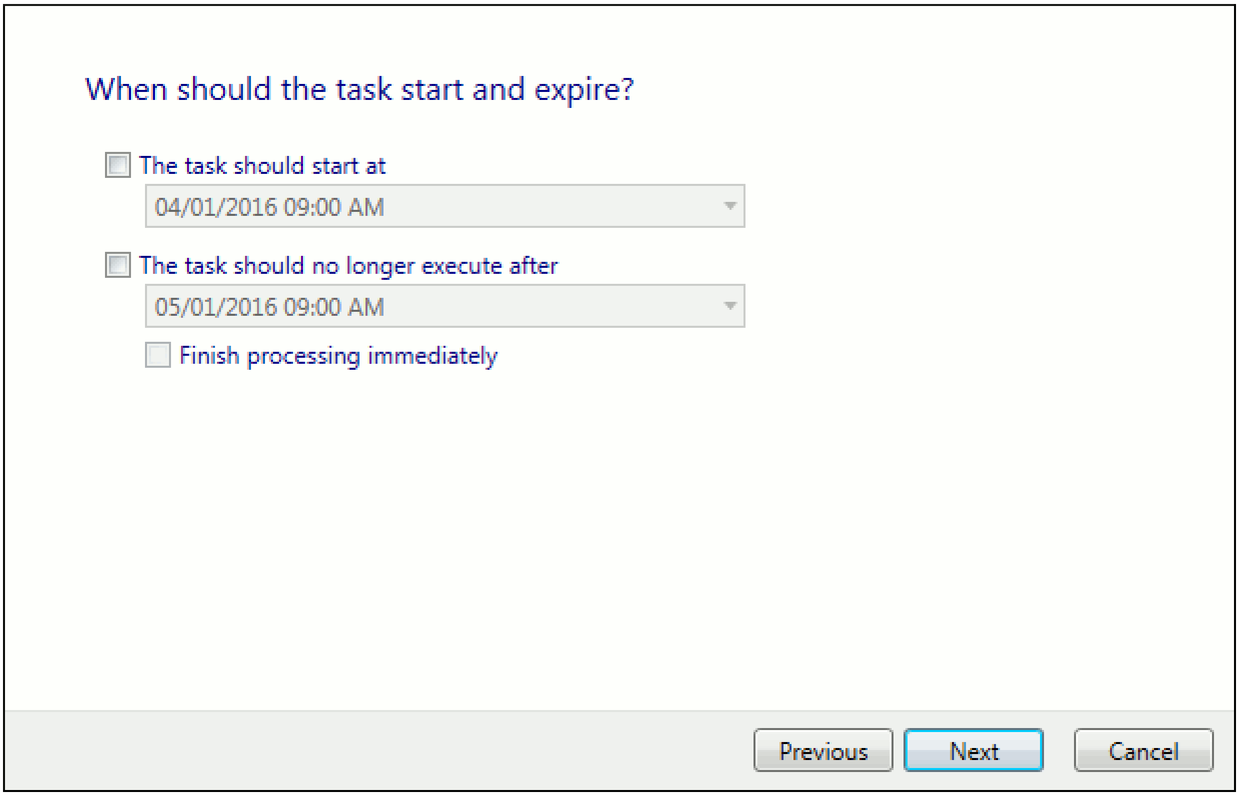


5. Select from the following options to determine when the interval schedules should execute:

Option	Description
The interval schedules should always execute	The interval schedules always execute at their configured times. For example, if an interval schedule is configured for 30 minutes, the interval schedule executes every 30 minutes without restriction.
The interval schedules execute during the periods specified by the following execution window	The interval schedules only execute during the days and times configured within the specified execution window. For example, if an interval schedule is configured for 30 minutes, and the execution window is Saturday, 9 a.m. until 5 p.m., the interval schedule executes at 9 a.m. on Saturday and every 30 minutes until 5 p.m. that Saturday. From the drop-down list, select the appropriate execution window.
The interval schedules should only execute during the following periods	The interval schedules only execute during the time periods configured within the ad hoc execution window. To create an ad hoc execution window, click the **Add** button. Select the days of the week and the time period the interval schedule should be run. Continue adding time periods as necessary. To abort task execution after the ad hoc execution window reaches the end of a time period, select the **Stop immediately at end** option. This makes it so that at the end of a time period, the schedule finishes processing the current item and stops. **Note:** Unity Script scheduler tasks must be written to specifically support the ability to stop immediately.

Note: Interval schedules are run at the earliest allowed time and then continue running for the configured intervals. For example, if an interval schedule is set for 10 minutes, and it begins on the current day, the next run time for the schedule is the time you finish configuration in the Task Wizard. The schedule then runs every 10 minutes for the duration of the specified time period.

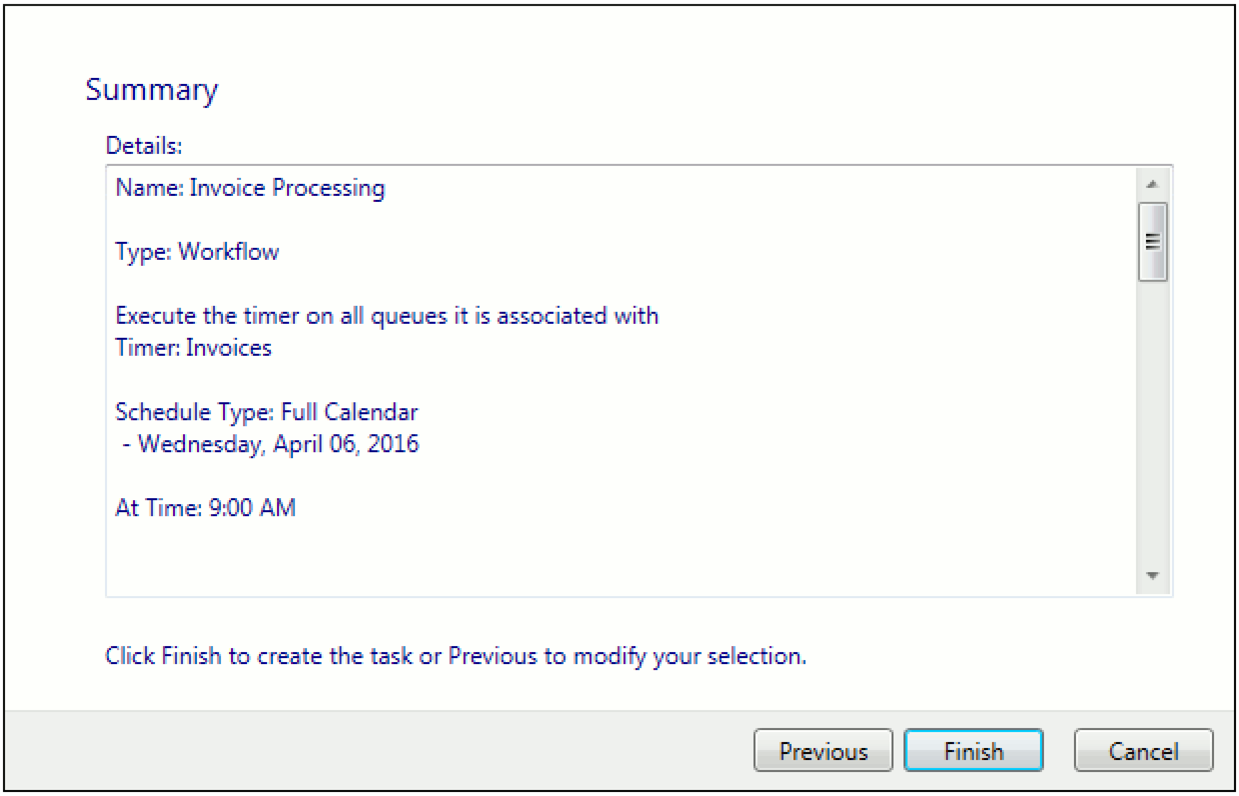
6. Click **Next**.



7. To set a specific start time, expiration time, or both, select from the following options:

Option	Description
The task should start at	Select to set a specific start time for the task. Enter or select the appropriate date and time.
The task should no longer execute after	Select to set a specific end time for the task. Enter or select the appropriate date and time.
Finish processing immediately	When selected, the task ends at its earliest opportunity after the end time passes. When deselected, the task ends after the end time passes and the entire task is completed. **Note:** This option is only enabled when **The task should no longer execute after** option is selected.

8. Click **Next**. The summary of your configuration is displayed.



9. Click **Finish** to save the task.

Enabling the Distribution Service

To use the Distribution Service to send users email notifications or to distribute emails, you must enable it through Global Client Settings. (This step is not necessary if the Distribution Service is used only by WorkView.)

The Distribution Service can be used to send email distributions while using the Document Distribution module and is optional.

The Distribution Service is optional if you want to send notifications for the following modules in the OnBase Client: Document Knowledge Transfer, Workflow, and Physical Records Management. The Distribution Service is required for all other modules that are able to send notifications (such as Document Knowledge Transfer or Workflow in the Web Client).

Enable Email Automation

To enable email automation using the Distribution Service:

1. From the Configuration module, select **Users | Global Client Settings**.
2. Click the **Email** tab.

3. Select the **Use Email Distribution Service for automated emails** check box or, if you are configuring the Distribution Service for Document Distribution, select the **Use Email Distribution Service for Document Distribution** check box.
4. Click **Save**.

Send Attachments

The Distribution Service can be configured to send attachments with certain file names.

Note: Image documents are sent in their native format if possible. However, if the document uses overlays or the page count is greater than one, it will revert to using the original method for sending attachments.

To configure file names for attachments:

1. From the Configuration module, select **Users | Global Client Settings**.
2. Click the **Email** tab.
3. Select one of the following from the **Auto-Name string for external email attachments** drop-down list:
   - **Random String:** OnBase will generate a random file name for the attachment.
   - **Document Type Autoname String:** OnBase will use the Auto-Name string configured for the Document Type of the document being sent.
   - **Document Type Print Autoname String:** OnBase will use the Print Title string configured for the Document Type of the document being sent. If no Print Title string has been configured for that Document Type, OnBase will use the Document Type and the Document Date.

Note: The **Document Type Print Autoname String** feature is not supported in the OnBase Client.

4. Click **Save**.

Note: The Distribution Service needs to be restarted after changes are made to the **Auto-Name string for external email attachments** setting.

Users Configuration Requirements

The following procedure describes the steps necessary to configure the Distribution Service for system notifications. Ensure users who will receive notifications have email accounts configured in their User Settings.

1. From the Configuration module, select **Users | User Names/Passwords**.
2. Select the user name and click **Settings**.
3. In the **Users Email** field, type the user’s email address.
4. Click **Save**.

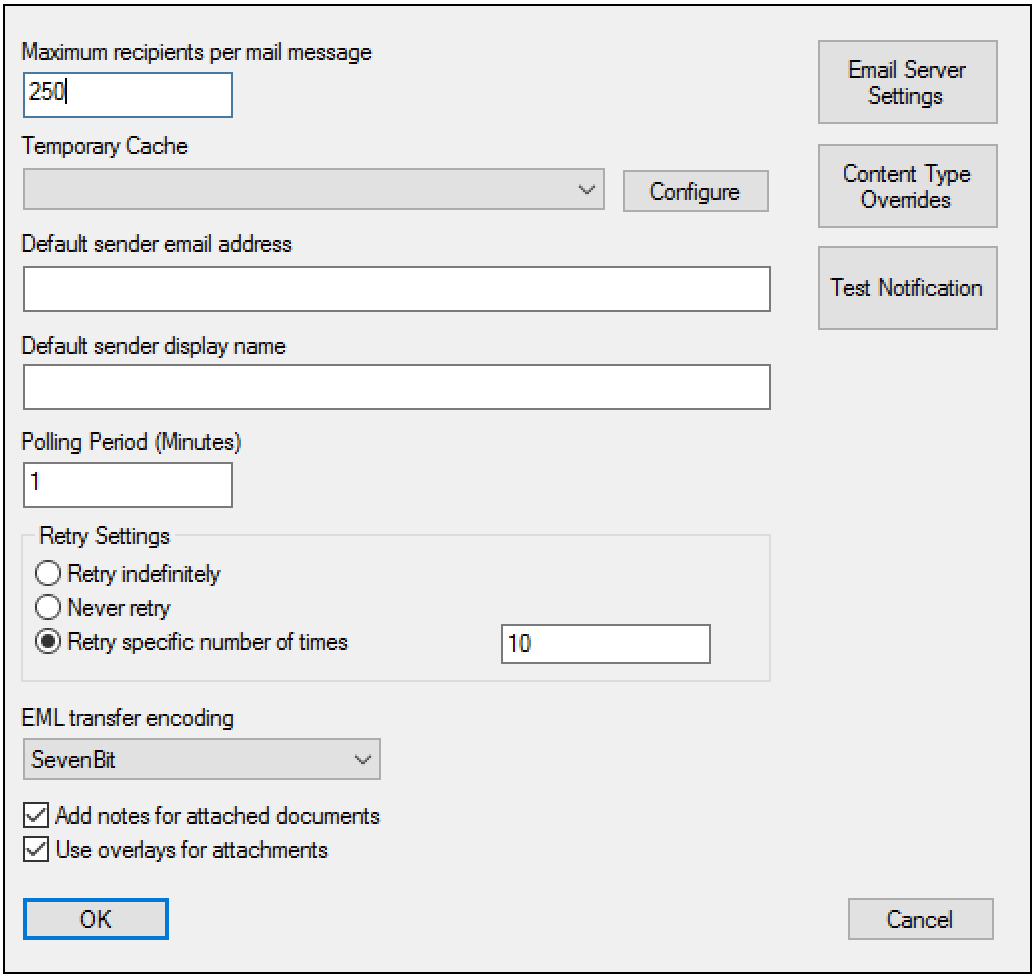
Configuring Test Mode

In a testing environment, you can configure the Distribution Service to write emails to a file in order to test messages without actually sending them to recipients.

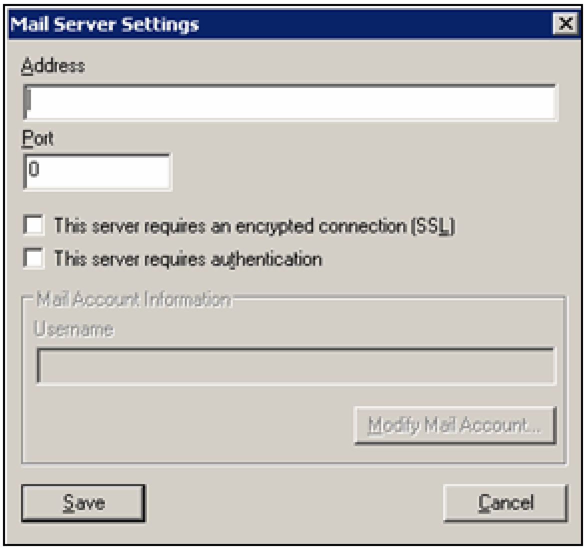
Caution: Testing should be performed in a separate testing environment. It is not recommended to use test mode in an environment with live data.

To configure test mode:

1. Open the OnBase Configuration module.
2. From the **Utils** menu, select the **Distribution Service Settings** option. The Distribution Service Settings dialog box is displayed.



3. Click the Email Server Settings button. The Mail Server Settings dialog box is displayed.



4. In the **Address** field, enter an address to a valid UNC path.
5. Click **Save**.

With test mode enabled, messages are saved in EML format to the specified location. These messages can be viewed, verified, and deleted as necessary.

Adding Support for Multiple Data Sources

If your solution uses multiple data sources, then the Hyland Distribution Service can be configured to access each data source. This provides multiple data sources for redundancy should a data source go down.

To configure the Hyland Distribution Service to access multiple data sources, a corresponding **Email Sending** Unity Scheduler task must be created for each data source. See the **Unity Scheduler** module reference guide for more information.

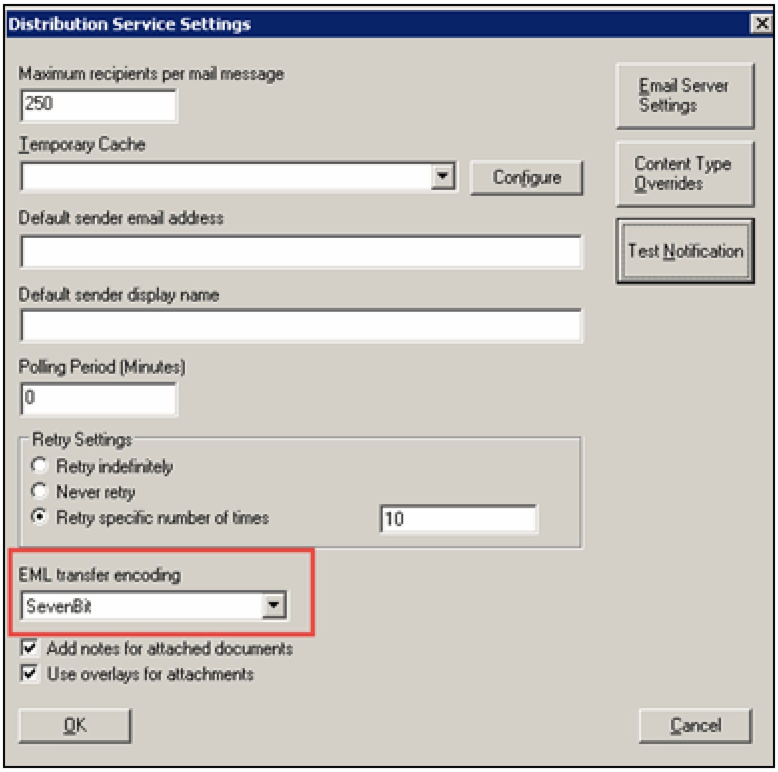
Note: To conserve system resources, increasing the polling period is recommended. This can be modified from the Unity Management Console. For more information on task scheduling, see the **Unity Scheduler** module reference guide.

Configuring EML Transfer Encoding

In some instances, you might want to output email notifications to EML files to be processed by a third-party mail application. When this method for distributing notifications is necessary, complete the following steps:

Note: EML files can also be used in testing.

1. Create a directory to store the EML files. This directory should be accessible locally, in a mapped drive or through an UNC path to a shared directory. The path name must be fully qualified. It must start with \\Name, where Name is the name of the machine name, or X:\, where X is any drive letter.
2. From the **Distribution Service Settings** dialog box, select an encoding option from the **EML transfer encoding** drop-down list.



3. Select from either **ServerBit** or **EightBit**.
4. Click **OK** to save the option.

Configuring the Distribution Service to Save Notifications as E-Mail (EML) Files

In some instances, you might want to output email notifications to EML files to be processed by a third-part mail application. When this method for distributing notifications is necessary, complete the following steps:

1. Create a directory to store the EML files. This directory should be accessible locally, in a mapped drive or through a UNC path to a shared directory. The path name must be fully qualified. It must start with \\[Name], where [Name] is the name of the machine name, or X:\, where X is any drive letter.
2. Modify the address in Configuration | Utils | Distribution Service Settings | Email Server Settings so that the address entry specifies this directory name. One file per notification will be written to the target directory specified.

Sending Notifications in HTML Format

If you want your notification to be received by the user in HTML format, the notification must be in plain text, and you must add the <HTML> tag to the body of your message.

Note: This applies only to plain text notifications. Formatted notifications does not support the use of HTML tags.

Sending Unity Forms

If you plan to send Unity Forms using the Distribution Service, please see Unity Forms Limitations on page 312.

Configuring a Temporary File Cache

A temporary file cache is recommended because email notifications and their attachments sent from Document Distribution may include emails and attachments that are not archived in OnBase. The Distribution Service sends these emails from the temporary file cache. Attachments are sent in their configured file format.

Access to the UNC share path of the Temporary File Cache must be provided for the following:

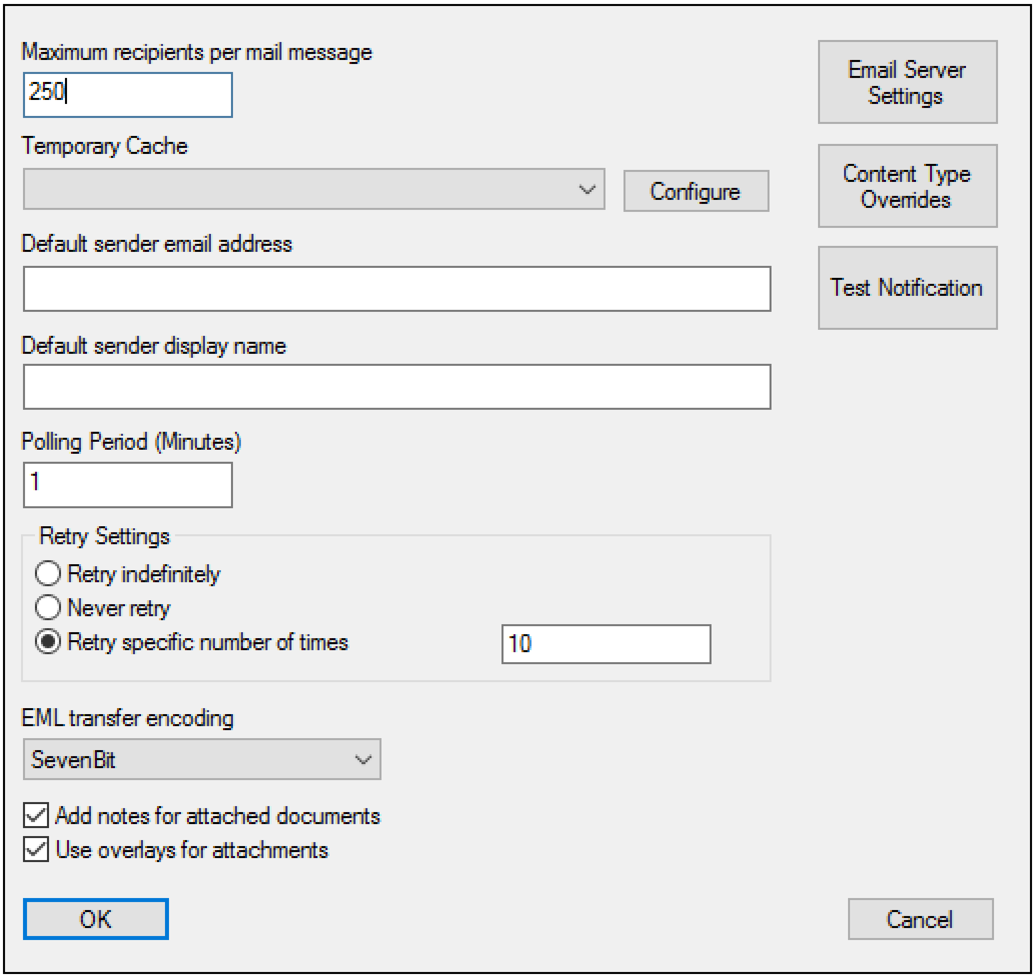
- Within a Core-based Workflow, the Application Pool Identity and Distribution Service account must have access.
- Both the Windows account that is accessing the OnBase Client as well as the Distribution Service account must have access.

A temporary file cache must be configured and associated with the Distribution Service under the following circumstances:

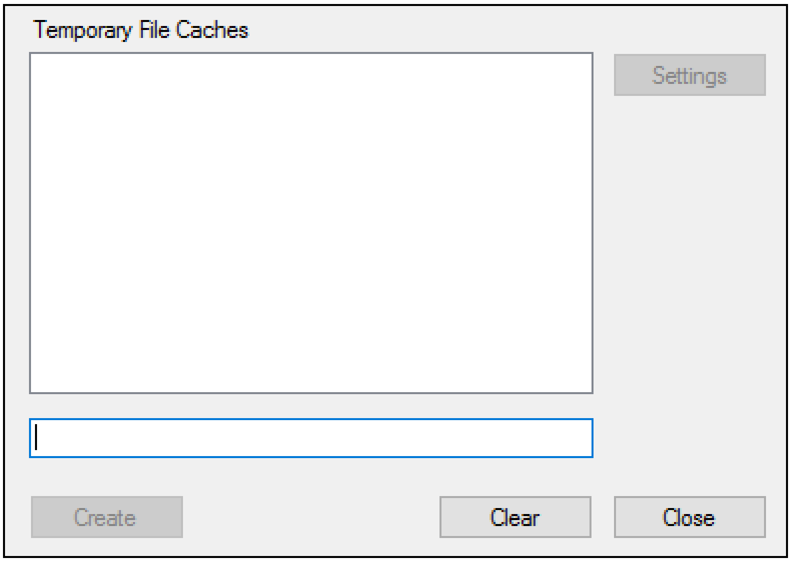
- When the Global Client Setting **Use Email Distribution Service for Document Distribution** is enabled.
- When using formatted or rich text notifications. In order to use formatted notifications, you must have Temporary Cache enabled and set up for the database you are using for testing purposes.
- When sending messages larger than 64000 bytes using WorkView | Case Manager.
- When using HTML WorkView | Case Manager notifications.

To create a temporary file cache:

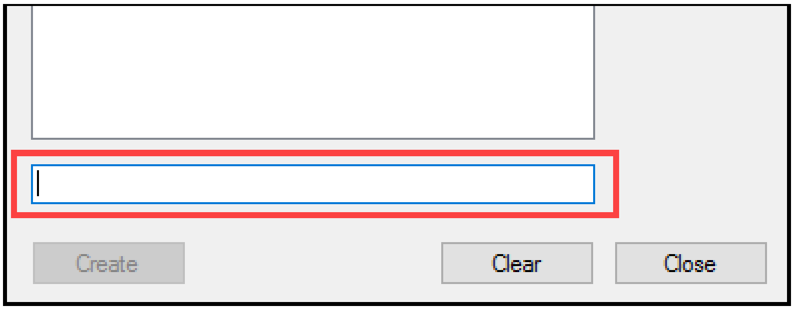
1. In the Configuration module, select **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.



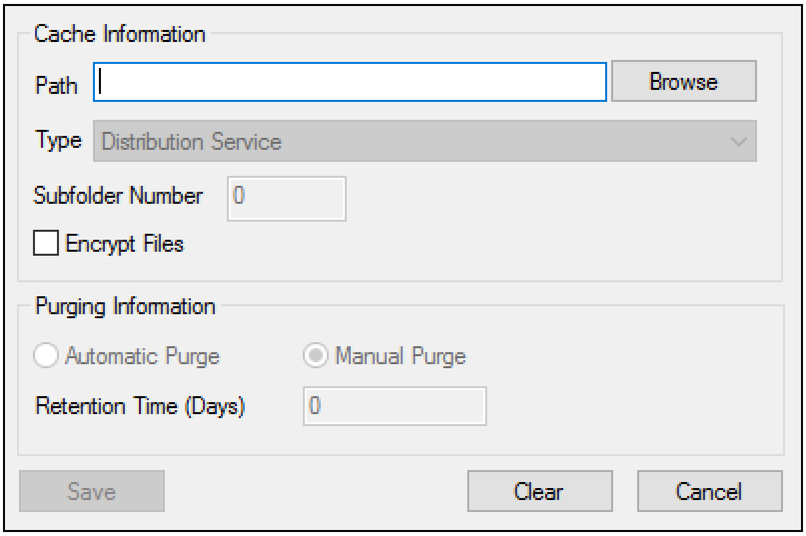
2. Click the **Configure** button next to the **Temporary Cache** drop-down list. The **Temporary Caches: Distribution Service** dialog box is displayed.



3. In the empty field, type the name of the cache you want to create.



4. Click **Create**. The **Cache Configuration** dialog box is displayed.



5. Enter the file path of the temporary file cache in the **Path** field, or click the **Browse** button to navigate to the location.

Note: The file you browse to must be a UNC Share, in which the application pool and the account running the Distribution Service have access to this share. The share name must not contain spaces.

The **Type** drop-down list is set to **Distribution Service** by default. This is the service that is automatically used when creating a temporary file cache.

Note: If the **Cache Configuration** dialog box is accessed from the **Distribution Service Settings** or **Integrated Office Viewer Settings** dialog box, the **Type** field is set to **Distribution Service** or **Microsoft Office Web Apps**, depending on the point of access, and cannot be changed. These temporary caches, created from the **Configure** button in the **Distribution Service Settings** dialog box or the **Integrated Office Viewer Settings** dialog box, are automatically associated with the desired functionality upon completion of configuration.

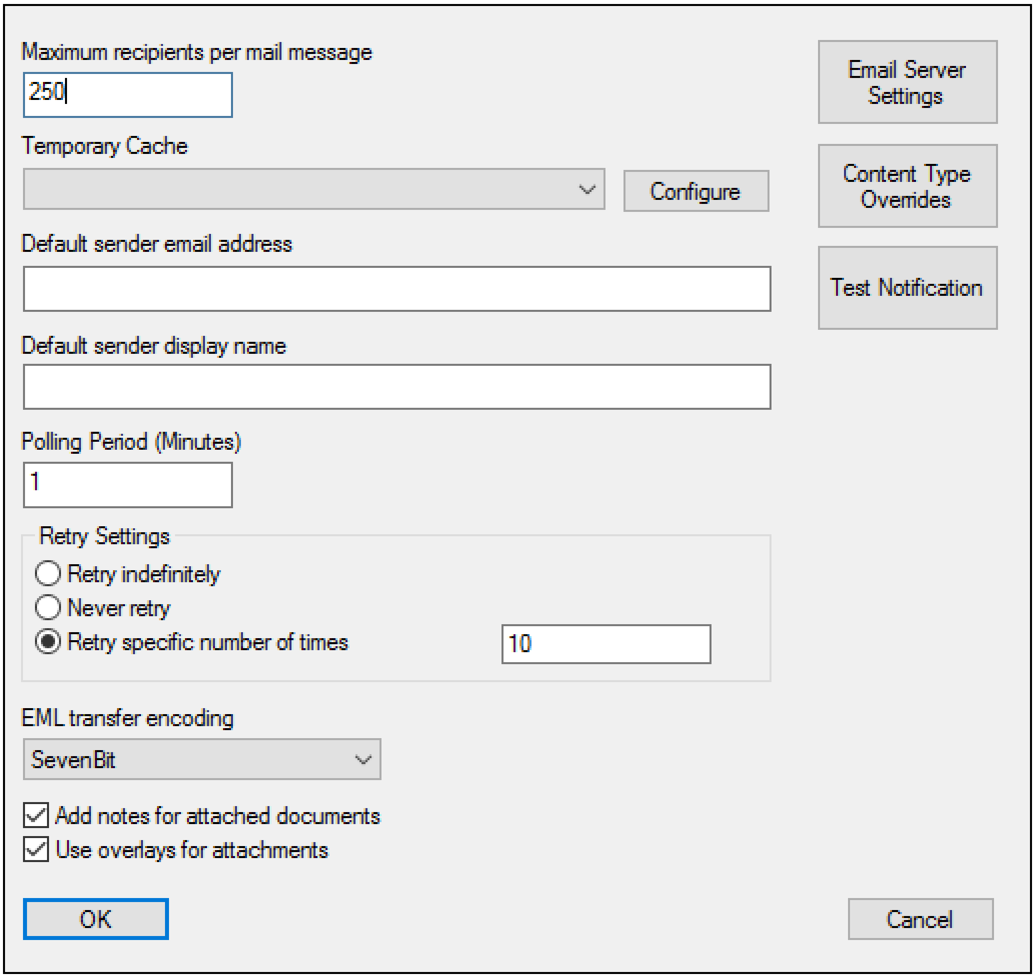
6. Select **Encrypt Files** to encrypt the temporary files. Encrypting the data prevents people from opening the files, which keeps the information more secure.
7. Click **Save**.

Note: Once a temporary file cache is configured, it must be associated with the Distribution Service. See Configuring Retry Settings on page 293 for more information.

Configuring Retry Settings

The Distribution Service can be configured to attempt to send notifications again upon a failure. To configure these settings:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:

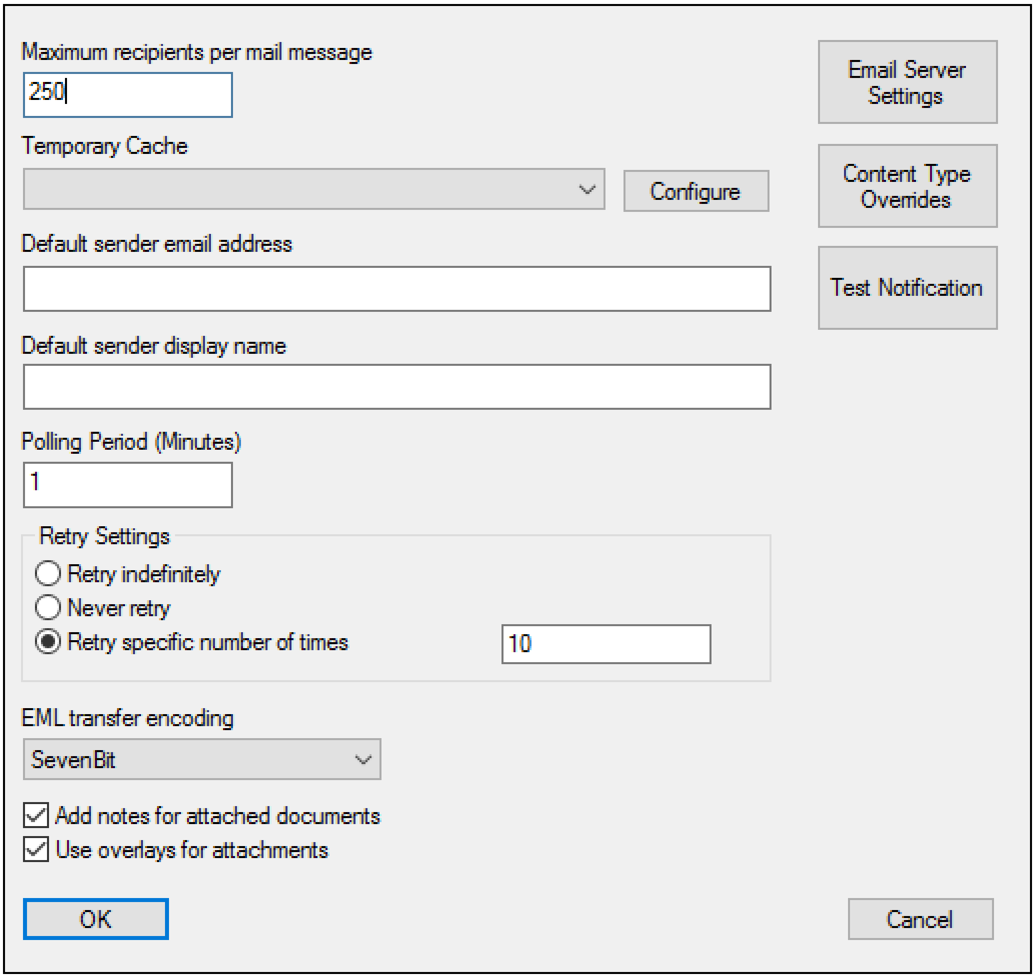


2. In the **Retry Settings** section, select one of the following options:
   - **Retry indefinitely -** The Distribution Service continuously tries to send a notification if a failure occurs.
   - **Never retry** - The Distribution Service does not attempt to send the notification if a failure occurs.
   - **Retry specific number of times** - The Distribution Service tries to send the notification until the specified number of attempts is reached. In the field provided, enter the number of attempts that you want the Distribution Service to make.
3. Click **Save**.

Configuring Maximum Recipients

A maximum number of recipients per each generated notification email message can be configured. This ensures that in the case of a long list of recipients, recipients are broken up and multiple emails are generated in order to prevent timeout errors. To configure a maximum number of recipients per email:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:



2. In the **Maximum recipients per mail message** field, enter the maximum number of recipients that a message should have. If the recipient list is longer than the value of this setting, emails are sent in multiple batches.

Note: If you do not want a maximum number of recipients per mail message, set the **Maximum recipients per mail message** value to **0**. This does not set a maximum number of recipients. A single message is generated for all recipients.

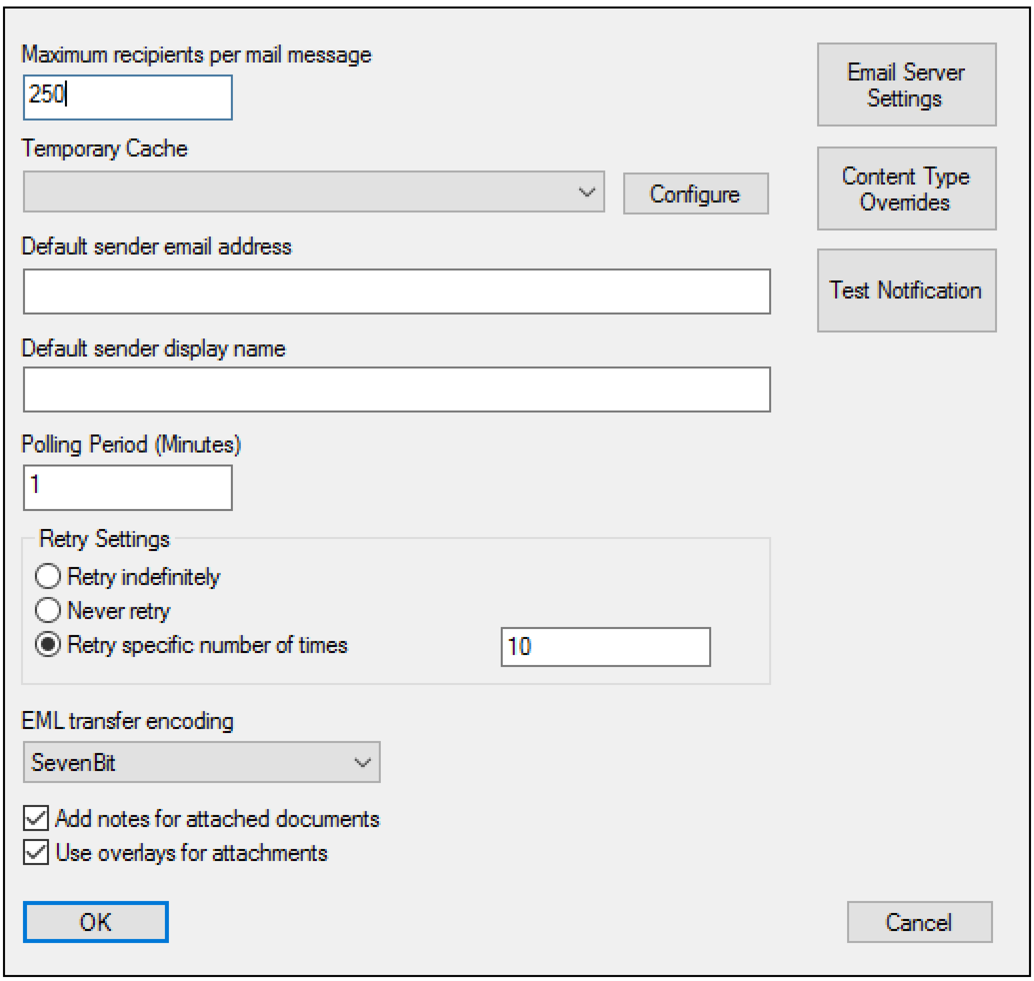
Configuring Default Sender Options

You can establish a default sender for any emails that are distributed using the distribution service. This can be used if you want to send emails using a generic account. For example, if you want to send general information to a group of people, you may want to set up an Information email account.

Note: The sender that displays is either the authenticated user or the sender of the request. If those are not available, then the default sender value is used.

To configure a default sender:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.



2. In the **Default sender email address** field, type the email address belonging to the sender you want listed as the default. For example, the sender email could be info@email.com.

3. In the **Default sender display name** field, type the name for the default sender. If this is to be a general information account, you may want to type Information as the default sender.
4. Click **OK**.

Displaying the User Who Triggered the Notification as the Sender

The Default Sender email address is configured in the OnBase Configuration module, using the Distribution Service Settings dialog box. See Configuring Default Sender Options on page 295 for more information.

The following progression is taken if authentication is not used:

- Initially, the sender who generated the notification will be used.
- If that value is null, then the Distribution Service's default sender address value will be used.
- If that value is null, then the user who generated the notification will be used as the sender.

Note: When displaying the user who triggered the notification as the sender, leave the **Default Sender** field empty.

Users who trigger notifications must have valid email addresses configured in OnBase. Otherwise, the notifications are not sent, and the message **Server Error: 501 5.5.4 Invalid Address** is displayed in the **Errors** tab of the Diagnostics Console.

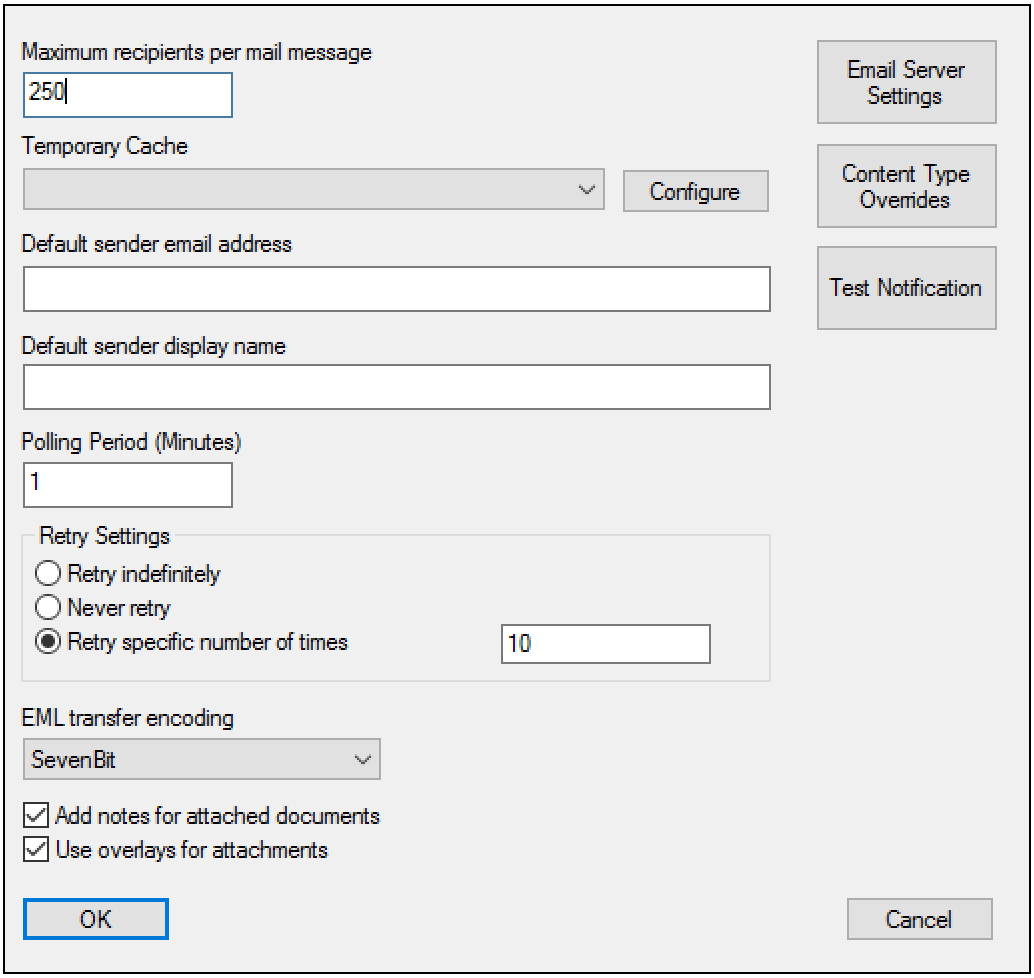
The **Default Sender** setting can be overridden by modules like Workflow and WorkView, which allow you to configure the sender address for notifications.

Configuring Attachment Options

If a document that has been attached to an email contains notes or overlays, you can configure the document to not include notes and overlays when the document is sent as an attachment.

To configure document options:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.



2. De-select the **Add notes for attached documents** check box to remove the notes from attached documents.
3. De-select the **Use overlays for attachments** check box to remove overlays from attached documents.
4. Click **OK**.

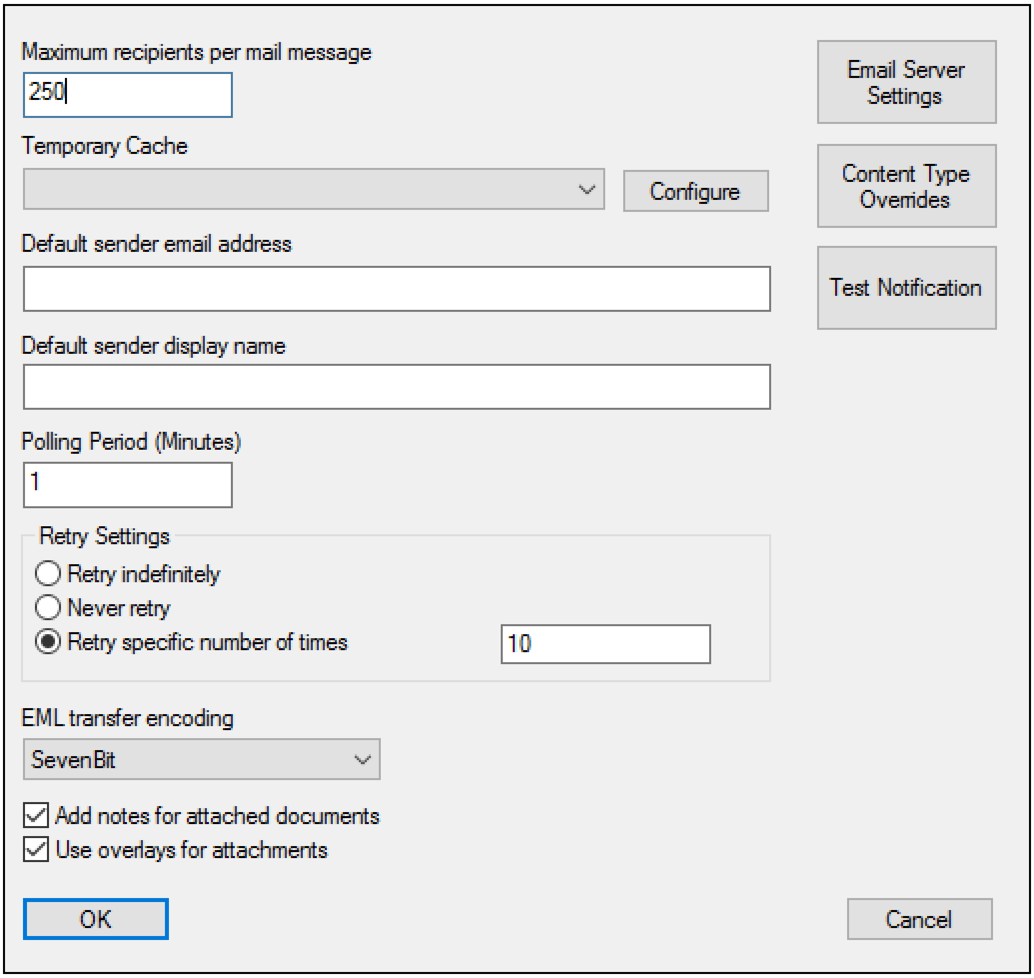
Configuring Email Server Settings

The Email Server Settings option provides the ability to configure the mail server to send emails. From this dialog box, you can specify an address for the server, the port number and other settings that are specific to the server. You can also require that emails are routed with an SSL encrypted connection.

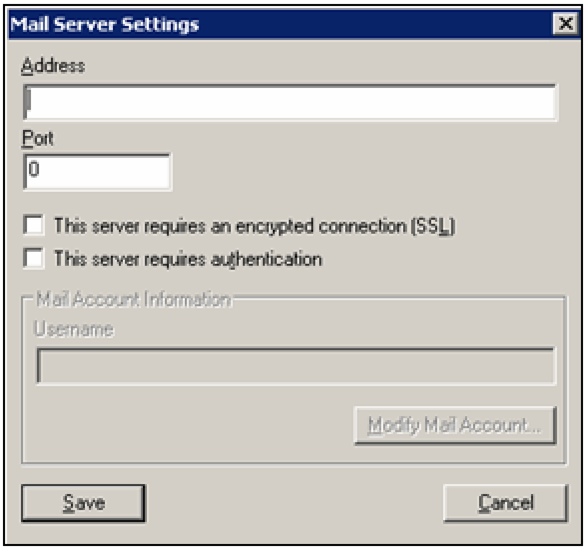
Note: The SmtpClient class for routing emails using SSL encryption only supports the SMTP Service Extension for secure SMTP over Transport Layer Security as defined in RFC 3207, which is published by the Internet Engineering Task Force (IETF). In this mode, the SMTP session begins on an unencrypted channel, then a STARTTLS command is issued by the client to the server to switch to secure communication using SSL.

To configure email server settings:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.

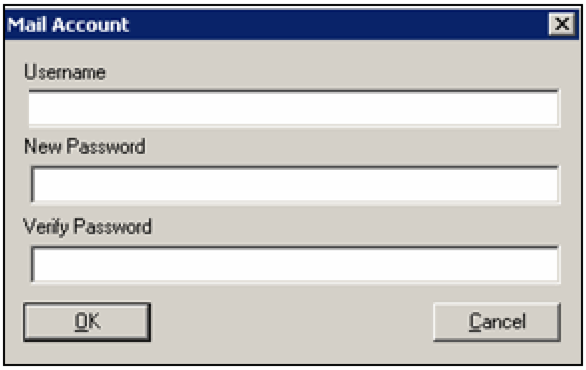


2. Click **Email Server Settings**. The **Mail Server Settings** dialog box is displayed.



3. In the **Address** field, type the address for the mail server.
4. In the **Port** field, type the port number that is used for the mail server.
5. Select the **This server requires an encrypted connection (SSL)** check box to require that the server has an encrypted SSL connection.

6. Select the **This server requires authentication** to validate that a mail account has been configured for the mail server. When this option is selected, the **Modify Mail Account** button is enabled. Select this button to display the Mail Account dialog box.



Enter a valid username and password in the **Username** and **New Password** fields. Re-enter the password in the **Verify Password** field, and then click **OK**.

Note: The user name must be formated as the following: email@domain.com.

When authentication is enabled, note the following:

- When replying to an email, the authenticated email (your email) is displayed in the From field.
- If the Default Sender field is populated, and authentication is enabled, the Reply to field is automatically populated with the request's sender when replying to emails.

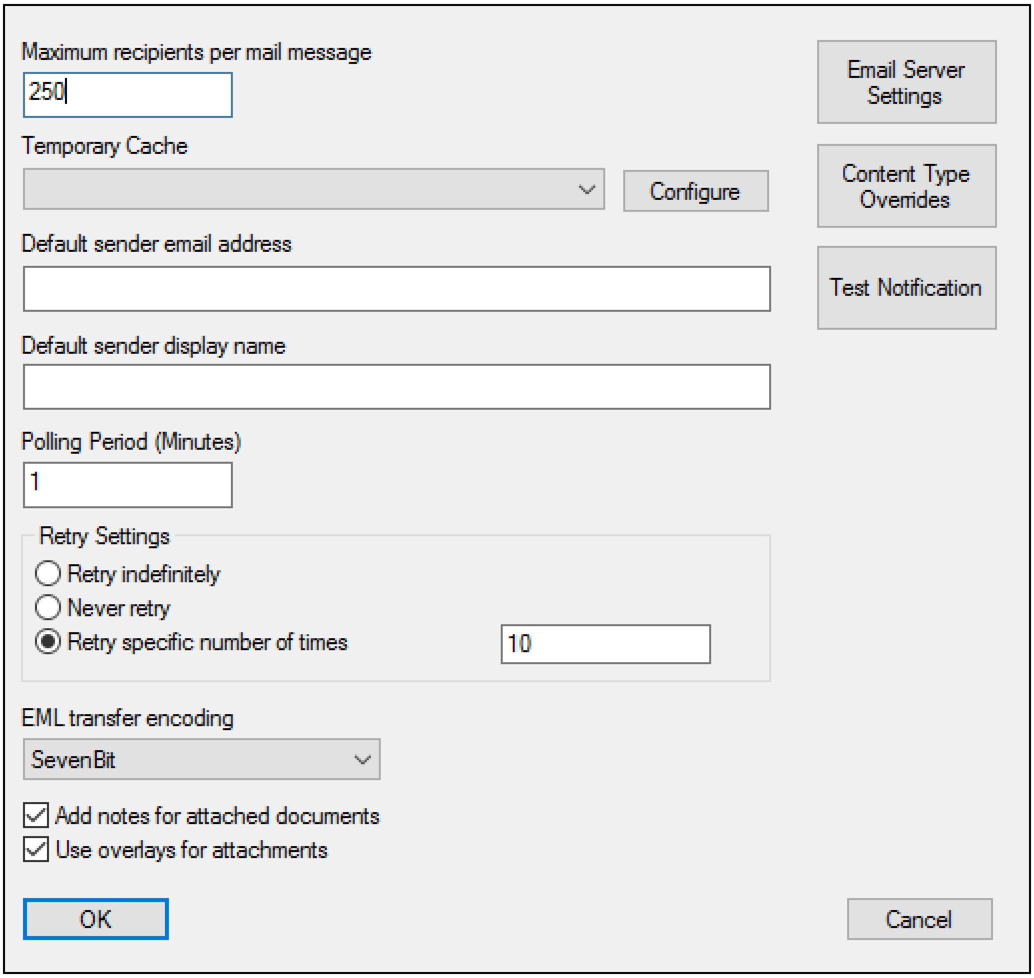
7. Click **Save** to save the mail server settings.

Generating and Sending Test Notifications

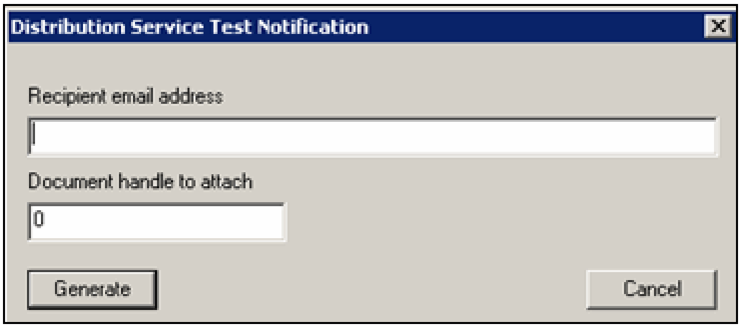
To ensure that the Distribution Service is configured properly, test notifications can be generated from the Distribution Service Settings dialog box.

To generate test notifications:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:



2. Click **Test Notification**. The **Distribution Service Test Notification** dialog box is displayed.



3. Enter a valid SMTP email address in the **Recipient email address** field.

4. If you want to attach a document, enter a document handle in the **Document handle to attach** field. The specified document will be sent as an attachment in the email.
5. Click **Generate**. The notification is sent when the Distribution Service is started. Check the recipient email mailbox to ensure the notification was sent.

Viewing Reports in the Unity Management Console

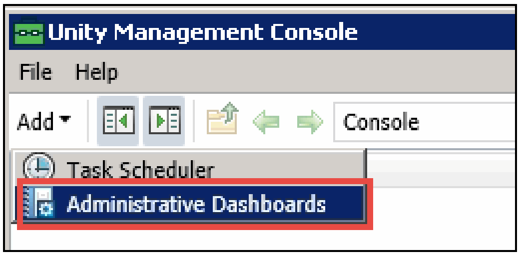
The Distribution Service Administrative Dashboard is available in the Unity Management Console. This dashboard allows you to view the status of emails that have been sent through the Distribution Service. Using the dashboard, you can view reports for the following:

- All Emails
- Successful Emails
- Failed Emails
- Pending Emails

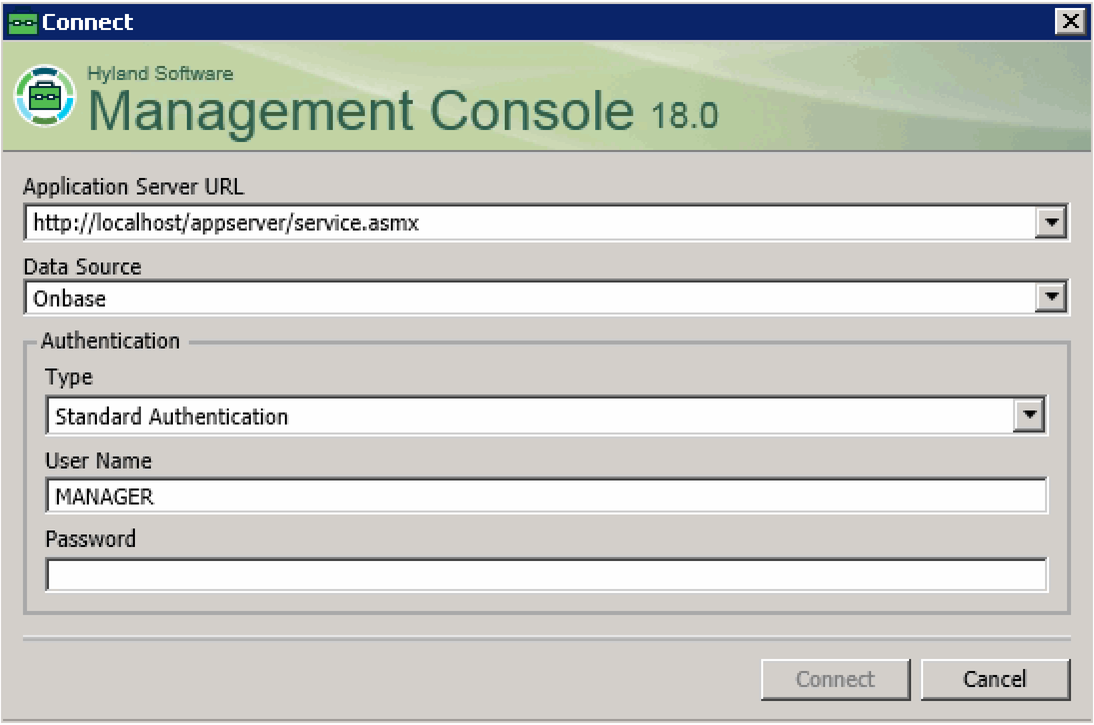
Before you can use the new dashboard, you must install the Unity Management Console. See the **Unity Scheduler** module reference guide for more information.

To add the Distribution Service Administrative Dashboard:

1. Open the Unity Management Console.
2. Click **Add | Administrative Dashboards**.

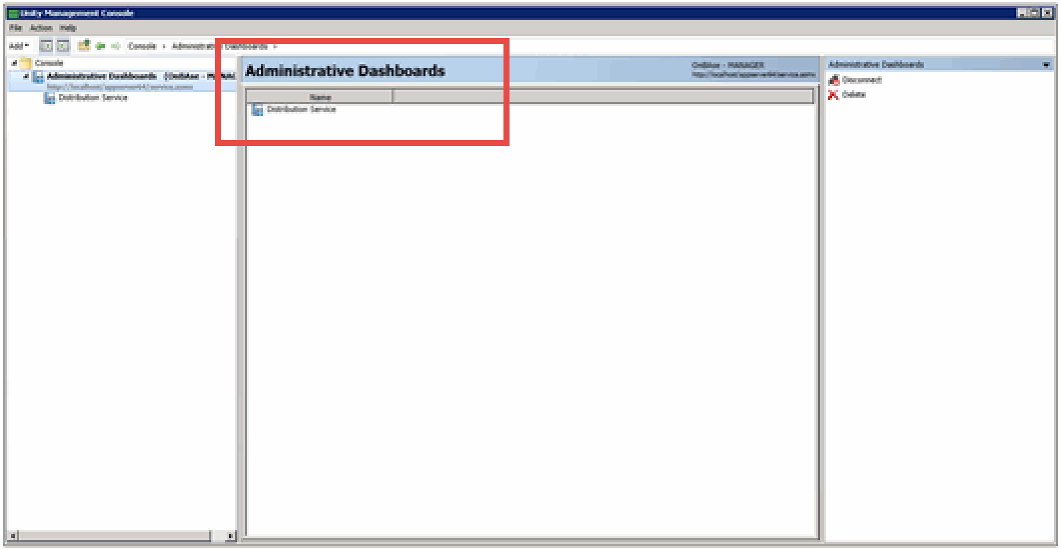


The **Connect** dialog box is displayed.



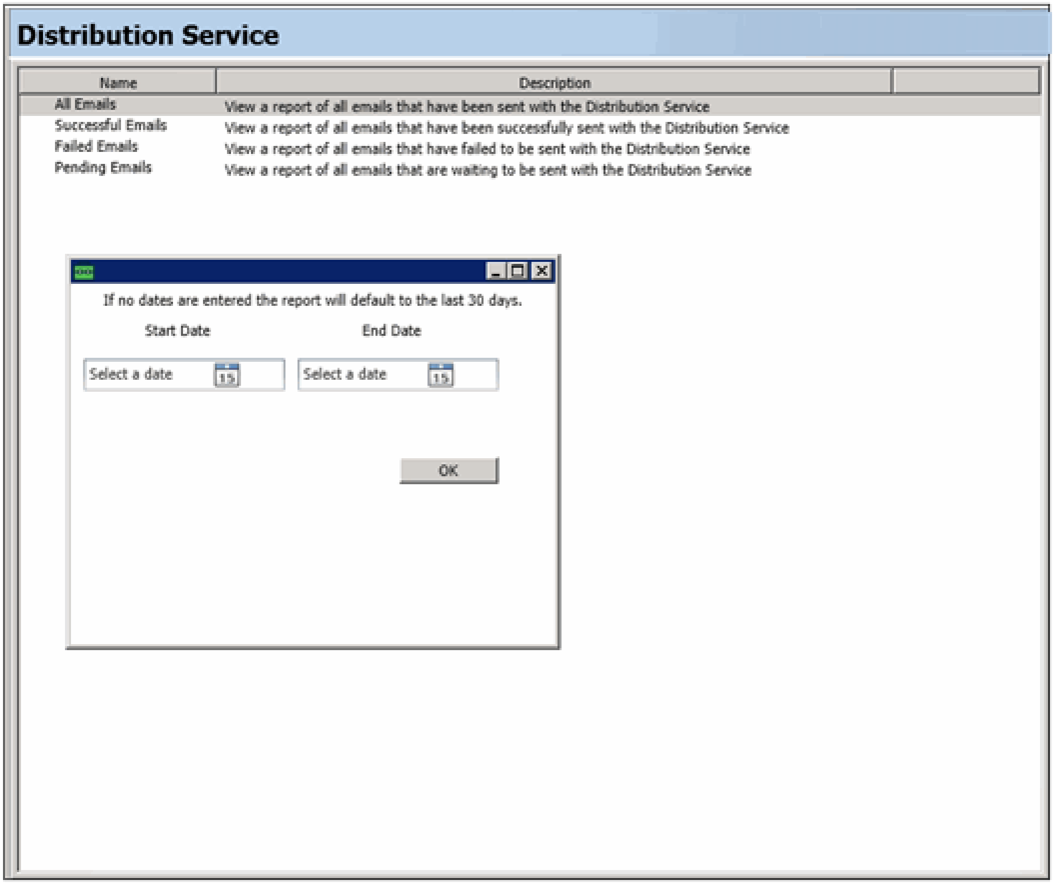
3. Ensure that the information provided in the fields is correct.
4. Enter your password in the **Password** field to authenticate the connection.

5. Click **Connect**. The **Distribution Service** dashboard is displayed in the **Administrative Dashboards** pane.



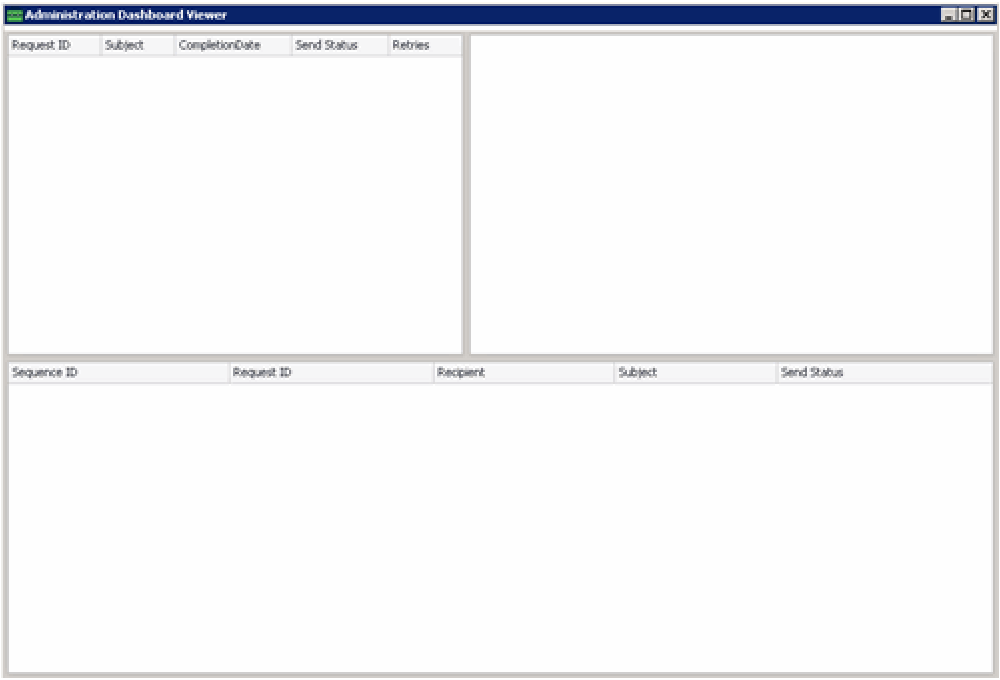
6. Double-click the **Distribution Service** dashboard.

7. Double-click a report to view one of the email report options. A date range dialog box is displayed.



8. Choose a date range from the **Start Date** and **End Date** pickers.

9. Click **OK**. The **Administration Dashboard Viewer** is displayed, listing information for any emails that fall into the category of the report you selected.



10. Click the **X** to close the **Administration Dashboard Viewer** window.

Troubleshooting

The following troubleshooting information may help you diagnose and resolve issues with the Hyland Distribution Service.

Logging Information to the Diagnostics Console

You can use the Diagnostics Console to troubleshoot Distribution Service issues. Diagnostics information is logged under the **Timer / Distribution Service** tab in the Diagnostic Console.

Note: For general information on diagnostics, see the Diagnostics Service reference guide or the Diagnostics Console help files.

When an **Email Sending** task is manually initiated from the Unity Management Console, the logging levels set in the Application Server's web.config file are respected. When an **Email Sending** task is automatically triggered by the Unity Scheduler, the logging levels set in the Unity Scheduler's app.config file are respected.

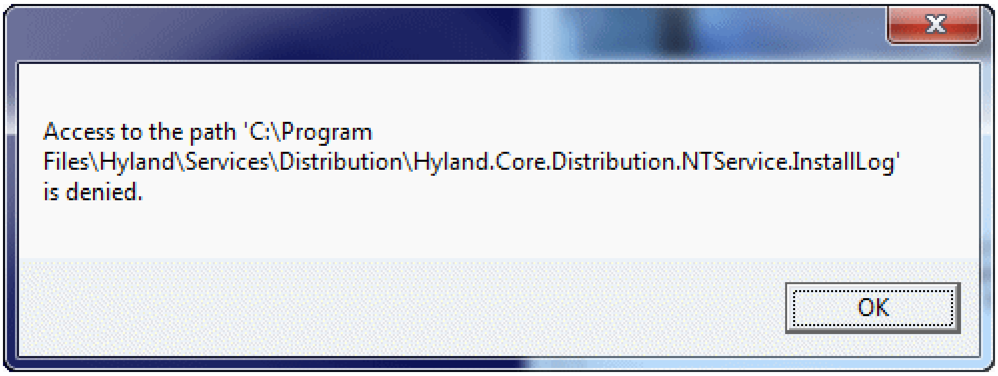
In either the Application Server's web.config file or the Unity Scheduler's app.config file, modify the logging level to activate logging. If logging is activated, it always occurs at the **Verbose** level. Setting the **minimum-level** key to different values will yield the results described below:

- If the line specifying the **minimum-level** is commented out, information about the Distribution Service is logged at the **Verbose** level.
- **Trace** - Information about the Distribution Service is logged at the **Verbose** level.
- **Verbose** - Logs important information and events regarding the Distribution Service.
- **Warning** - No Distribution Service information is logged.
- **Error** - No Distribution Service information is logged.
- **None** - No Distribution Service information is logged.

Note: If the Distribution Service sends an email without a specified **To** address, an SMTP server error displays on the **Errors** tab. The SMTP server sends Undeliverable Message notifications to the **From** address specified in the message template.

Access to the path...is denied

If you try to manually install or uninstall the Hyland Distribution Service on a server with Windows User Account Control (UAC) enabled, an "Access denied" message may be displayed.



To address this issue, run the Command Prompt as an administrator. Under **Start | Accessories**, right-click on **Command Prompt** and select **Run as administrator**.

For more information about how the User Account Control can affect OnBase deployments, see Windows User Account Control Statement on page 312.

Error Loading Document: Attachments Are Not Sent

When the Hyland Distribution Service sends emails with attachments, the body of the emails may say the following:

- ERROR LOADING DOCUMENT: Document Number: [#]

This error may occur because the account running the Hyland Distribution Service lacks privileges to the document on the OnBase disk group.

To resolve this issue, perform the following steps on the server where the Hyland Distribution Service is installed.

1. Using a **Run** dialog box, run **services.msc**.

   To do this, select **Start | Run**, type **services.msc** and click **OK**. The **Services** console is displayed.
2. Double-click **Hyland Distribution Service** from the list of services.
3. Click the **Log On** tab.
4. Under **Log on as**, select **This account**.
5. Type a valid domain user name and password that has access to the OnBase disk groups. This user account will be used to run the service.
6. Click **OK** to save your changes and close the properties dialog box.
7. Restart the Hyland Distribution Service.

Messages Are Not Sent

Messages may not be sent for multiple reasons. The following are general steps to troubleshoot the issue. Steps to address specific issues are provided in the following topics.

1. Ensure the Distribution Service Settings are configured correctly.
2. If there are any firewalls between the servers running the Unity Scheduler and the SMTP server, open the SMTP port to allow the traffic to pass through.
3. Verify proper credentials are used if using authentication.
4. Verify that your antivirus software is not configured to block the SMTP port.

Workstation Registration Not Found

When you run the Distribution Service, messages are not sent, and the following error is logged to the Diagnostics Console: **Workstation Registration not found for distribution server machine**.

This error is displayed because required OnBase components such as registry keys and the onbase32.ini file have not been created on the server running the Distribution Service.

To resolve this issue, log in to either the OnBase Client or the OnBase Configuration module from the server that is running the Distribution.

Cannot Create a Session Pool

If the Distribution Service is running but fails to send messages, the following error may be logged to the Diagnostics Console:

- Cannot create a session pool without a data source, user name, and password.

When this error occurs, do the following:

- Check the **Hyland.Core.Distribution.NTService.exe.config** file and ensure the **datasource**, **username**, and **password** parameters are specified correctly.
- Ensure the names of the parameters in the configuration file are spelled correctly, including case. Parameter names are case sensitive. For example, if **username** is spelled as **UserName**, the parameter is not loaded.

"No Count" Is On

If the Diagnostics Console reveals that notifications are being processed but are not being sent, you may need to turn off the No Count variable on your SQL Server. Please contact your solution provider for assistance.

Version Mismatch

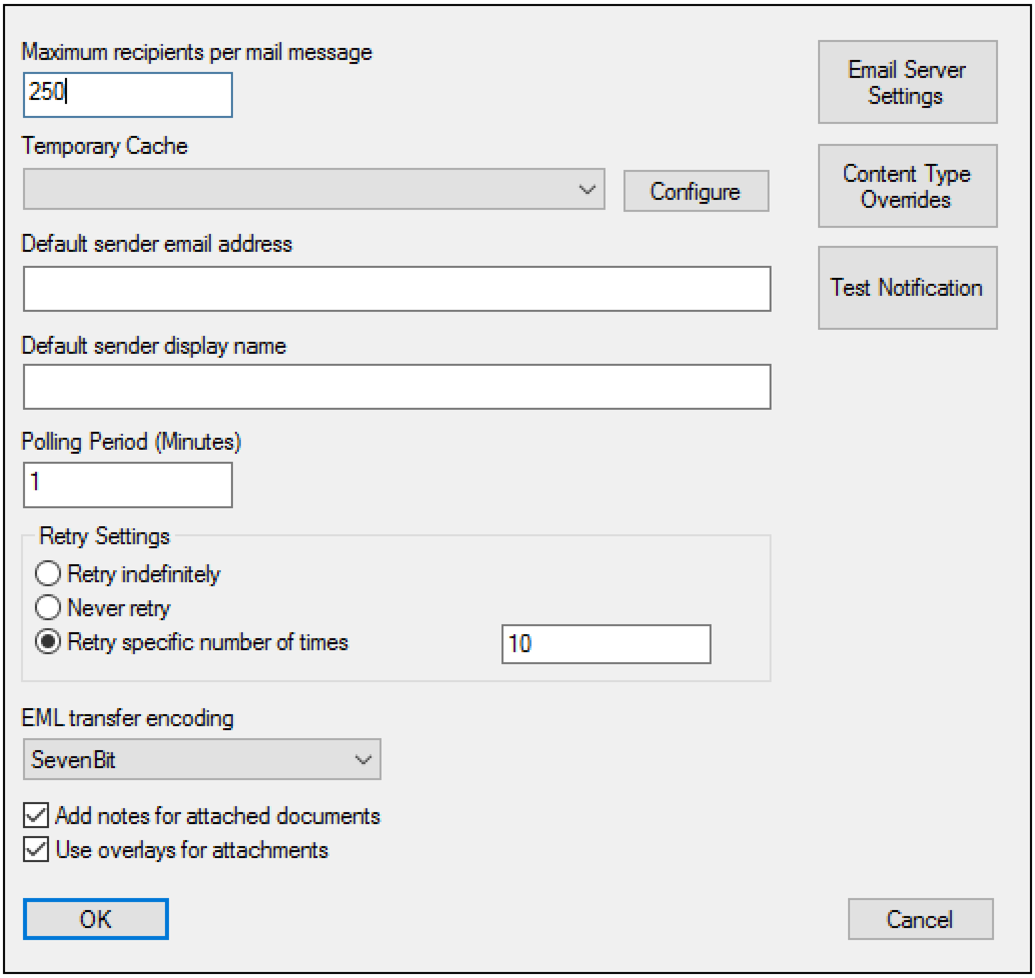
If you find that messages are not being sent, you may be using a version of the Distribution Service that is incompatible with your current version of OnBase. If this is the case, an error is logged to the Diagnostics Console indicating that there is a database version mismatch. Ensure the Distribution Service is upgraded to the same version as the rest of your OnBase solution.

Message Content and Attachments Are Reversed

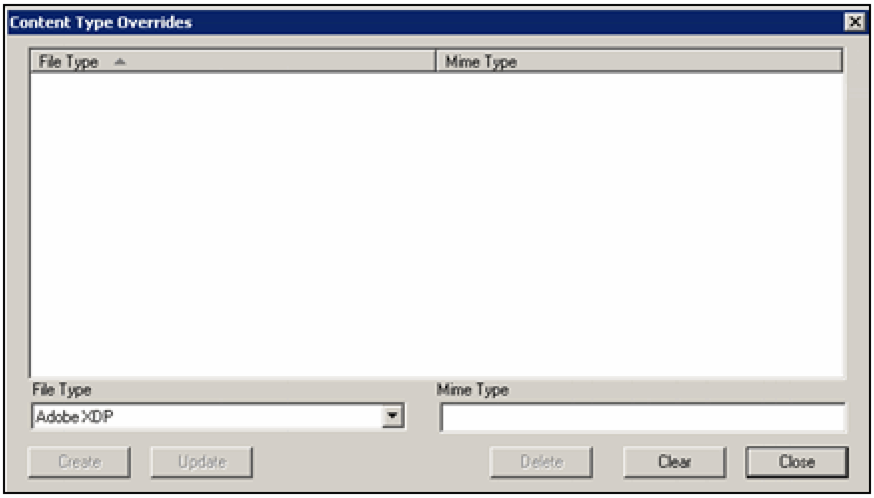
Some email clients do not properly handle content types for attachments with certain file formats. As a result, documents with these file formats are sent as the message text instead of as attachments, and the actual message text is sent as the attachment. If users receive emails where the message and the attachment are reversed, you may need to configure the Distribution Service to override the content type for those attachments' file formats.

Note: E-Forms are one example of documents with a file format that may be handled incorrectly. By default, the Distribution Service's configuration file is configured to override the content type on E-Forms, allowing them to be sent correctly as attachments.

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:



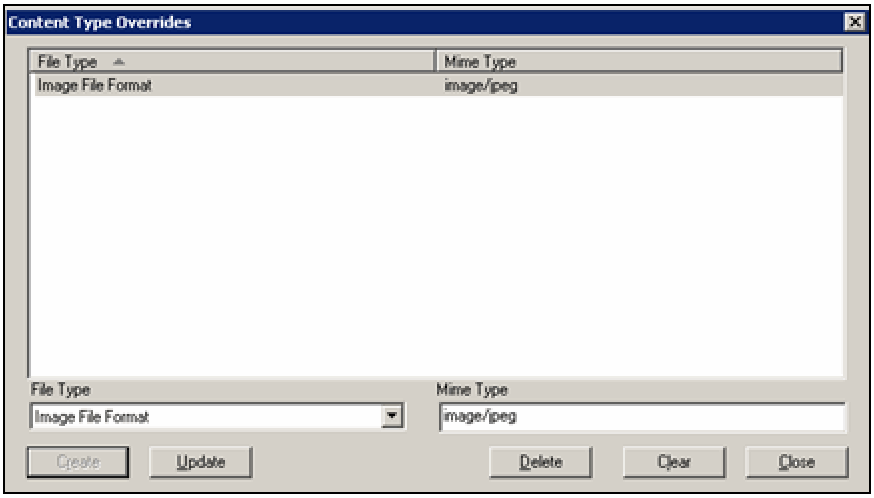
2. Click **Content Type Overrides**. The **Content Type Overrides** dialog box is displayed.



3. From the File Type drop-down list, select the file type that needs to be overridden.
4. In the Mime type field, enter the generic MIME type to label attachments that have the specified file format. Override options include:
    - application/octet-stream
    - application/pdf
    - application/rtf
    - application/soap+xml
    - application/zip
    - image/gif
    - image/jpeg
    - image/tiff
    - text/html
    - text/plain
    - text/richtext
    - text/xml

Note: If necessary, click **Clear** to clear the contents of the Mime Type field.

5. Click **Create**. The override is listed in the dialog box.



You can do any of the following if needed:

- **Update**. Click to update the override. The **Mime Type** field is activated, allowing you to modify the information.
- **Delete**. Click to delete the override.

6. Click **Close** to close the **Content Type Overrides** dialog box.

Unity Forms Limitations

- When Unity Forms are sent using the Distribution Service, section and page security configured on a Unity Form is not respected. The entire form is sent regardless of the security settings on the form.
- When Unity Forms are sent using the Distribution Service via the right-click **Send to** option, page tabs are not displayed in the form. Instead, the form's pages are displayed laterally.

Note: Unity forms are automatically sent as a .tif image when sent through the Distribution Service.

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.

Document Composition Template Converter

If you are upgrading from a version of OnBase prior to OnBase 14, any templates created with the Document Composition for Microsoft Word module must be converted to templates that can be used by the Document Composition module. This conversion must take place prior to upgrading.

The Document Composition Template Converter converts templates created with the Document Composition for Microsoft Word module to templates that can be used by the Document Composition module.

After the conversion is complete, the Document Composition for Microsoft Word templates can still be used in the Document Composition for Microsoft Word module.

Before You Begin

Before using the Document Composition Template Converter, ensure that you understand the following:

- You must contact your OnBase solution provider in order to obtain the Document Composition Template Converter that corresponds to your current version of OnBase.
- The required version of Microsoft .NET Framework must be installed on the workstation from which the Template Converter will be run.
- The Document Composition Template Converter should only be run once. Running it multiple times creates duplicate templates.
- The Document Composition Template Converter should be run by a user with rights to all templates that need to be converted. This is because the Document Composition Template Converter only allows you to convert templates that you have rights to modify.

Known Limitations

Because of architectural differences between the Document Composition for Microsoft Word and Document Composition modules, modifications to Document Composition templates are often required after conversion.

Limitations of the Document Composition Template Converter are listed below:

- Image fields are converted to **Unconfigured** Placeholders.
- Fragments and Bookmarks are converted to **Fragment** Placeholders. However, when selected on the converted template, they do not display as being configured in the **Placeholder Settings** pane. After conversion, select the Placeholder, click **Edit Placeholder**, and associate the correct fragment.
- Any Placeholders in the header or footer are not converted. The converted template will not contain header or footer fields.

Installation and Usage

After obtaining the Document Composition Template Converter from your OnBase solution provider:

1. Open **TemplateConverter.exe.config**.
2. Modify the following settings:

Setting Name	Description
ServicePath	Type the name of the Application Server.
DataSource	Type the name of the data source.
DisplayName	Type the name of the service location. For example, **http://[Application Server]/[Virtual Directory]/service.asmx**.
UseNTAuthentication	When set to **true**, the Document Composition Template Converter is configured to use Active Directory or LDAP Authentication. When set to **false**, the Document Composition Template Converter is not configured to use Active Directory or LDAP Authentication.

3. Save and close **TemplateConverter.exe.config**.
4. Ensure that all instances of Microsoft Word (**winword.exe**) are closed.
5. Double-click **TemplateConverter.exe**.
6. Log on using your OnBase user name and password.
7. The **Document Composition Template Converter** is displayed.
8. Click **Convert**.
9. The conversion activity is displayed and logged to the **ConversionLog.log** file. Click **Cancel** at any time to cancel conversion.
10. When conversion is complete, click **Close** to close the Document Composition Template Converter.

Post-Conversion

When template conversion is complete, it is considered a best practice to review the converted template.

Tip: Perform the following steps using two separate workstations, or with virtual machines.

1. Open the original Document Composition for Microsoft Word template in the OnBase Client.

Note: You can only view Document Composition for Microsoft Word templates using a pre-OnBase 14 Application Server and OnBase Client.

2. Open the newly created Document Composition template from the Template Builder.
3. Compare the two templates, modifying the newly created Document Composition template if necessary.

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.

Enterprise Document Composition Configuration

Configuring Templates for Use with Enterprise Document Composition

When configuring a template for use with Enterprise Document Composition:

- Avoid gathering critical data through anything that requires user interaction, such as a **User Prompt** Placeholder. If the template has **User Prompt** Placeholders on it, they will be removed from the document and ignored during Enterprise Document Composition.
- Use Keyword Mapping, either by applying the **Inherit Keywords from Source Document when possible** template option or by configuring Keyword Mapping for individual Placeholders.

Installation

Installing Enterprise Document Composition

While it is possible to install the Document Composition Service on the same workstation as the Application Server, it is not recommended. System resources can be compromised if you are using Enterprise Document Composition to generate a large quantity of documents.

OnBase®
Foundation EP5

Document Composition

User Guide

Foundation EP5

Creating a Document

A document is created from a template configured with Placeholders that pull in necessary information from OnBase.

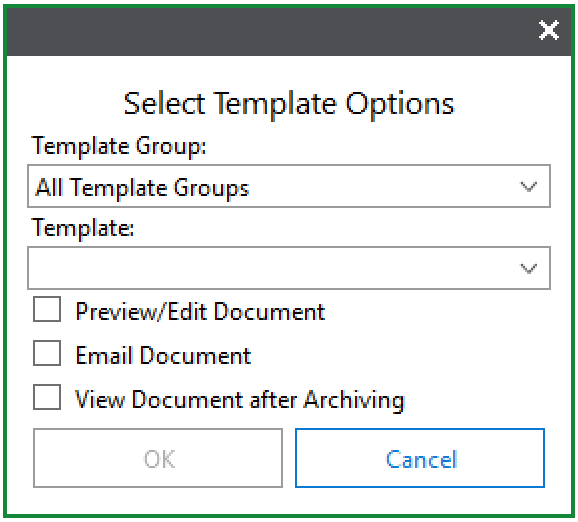
Documents can be created based on source documents that already exist in OnBase. When a new document is created based upon a source document, Placeholders that are configured to pull values from the source will automatically populate the new document.

In some instances, you may want to create a document that is not based on a source document. Depending on how the template is configured, this may be possible. If the template is configured to pull information from a source document and you create a document that is not based on a source document, the values that are dependent on a source document will be left blank. Before creating a document using this method, ensure that the template contains all of the necessary information without the use of a source document.

To create a document:

1. If you are creating a document that is based on a source document, retrieve the document in OnBase.

   If you are creating a document that is not based on a source document, skip to step 2.
2. Select **Document | Document Composition | Compose Document**.
3. If prompted, enter your login credentials.
4. The **Select Template Options** dialog box is displayed:



5. Select a template group from the **Template Group** drop-down list, or type the name of a template group. Selecting a template group is helpful when you have access to many templates.

6. Select a template from the **Template** drop-down list, or type the name of a template. If you selected a template group, only the templates that belong to the selected template group are displayed.
7. Depending upon your configuration, you may or may not be able to select from the following check boxes in the **Select Template Options** dialog box:

Option	Description
Preview/Edit Document	Select to view and/or edit the document before importing it into OnBase. **Note:** The composition preview is disabled if the template being composed contains secured Placeholders you do not have access to view, such as secured Unity Form Field or Unity Form Section Placeholders or security masked Keyword Placeholders.
Email Document	Select to create an email notification after the document has been created and archived in OnBase. If the template being used to generate the document is configured to automatically send an email notification after a document is generated, you do not need to select this check box. The email notification will be sent according to the template configuration. If the template is configured to automatically send an email notification, selecting this check box allows you to send an additional email notification. **Note:** The **Email Document** check box is only available to users that are able to send External Mail in OnBase.
View Document after Archiving	Select to view the document after it has been archived in OnBase.

8. Select **OK** to begin creating the document, or **Cancel** to exit.
9. You may be required to enter information in a prompt or an E-Form. If so, type in the provided field and click **Accept** or **Submit**.
10. If **Preview/Edit Document** was not selected, skip to step 13.

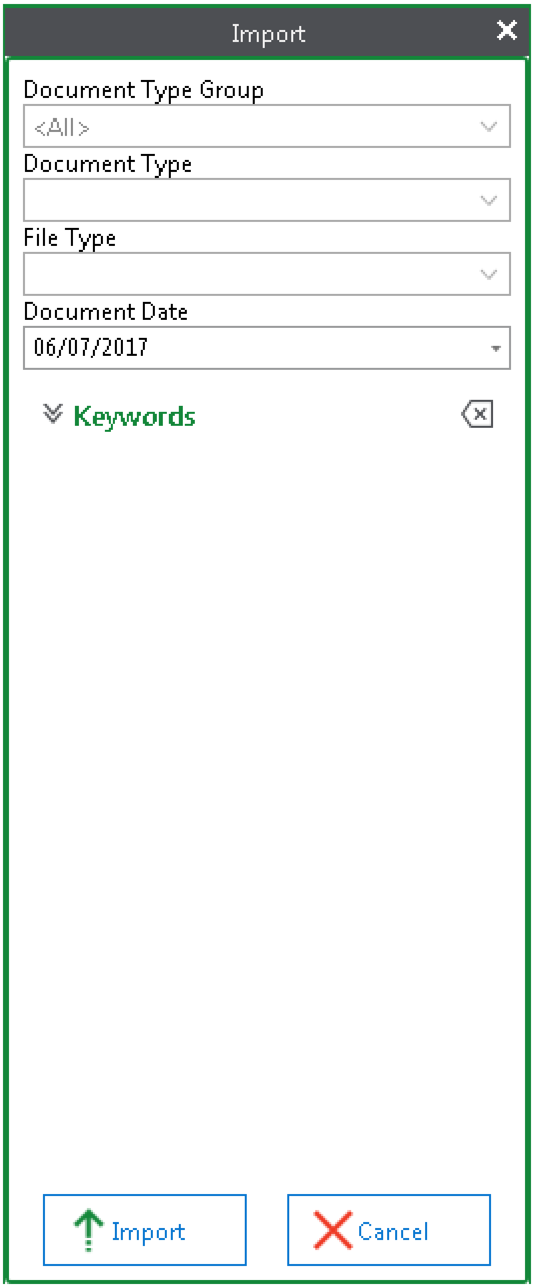
    If **Preview/Edit Document** was selected, the document is displayed. Depending on your configuration, the template may be displayed as read-only.
11. Modify the document if necessary.

Note: If you modify Keyword Values Document Composition scraped from the line-of-business application that appear in the document, only the original scraped Keyword Values will be used when uploading the document.

12. Select from the following buttons on the **Document Composition** tab:

Button	Description
Accept	Saves the document.
Redo	Starts the document creation process over from the beginning.
Cancel	Discards the document.
Print	Prints the document. **Note:** The **Print** button is only enabled for User Groups with **Print** privileges.

13. After clicking **Accept**, the **Import** dialog box is displayed:

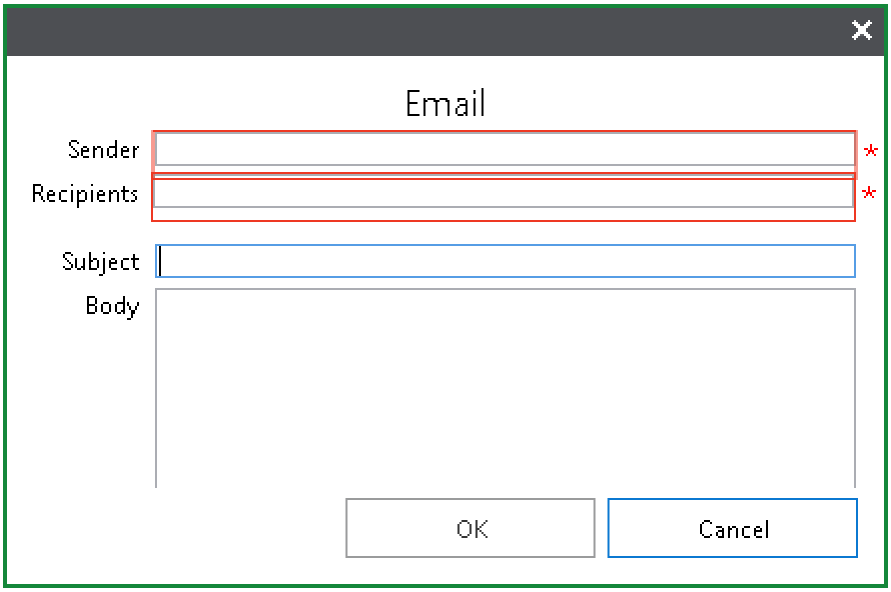


The Keyword Values Document Composition scraped from the line-of-business application are displayed. Specify additional Keyword Values if necessary, and supply any other necessary values to index the document.

Note: The **Import** dialog box may display multiple instances of the same Keyword Value. However, continuing to import the document saves only one instance of the value.

14. Click **Import**. The document is imported to OnBase.

15. If you selected **Email Document**, the **Email** dialog box is displayed:



16. Specify the following on the **Compose** tab:

Field	Description
Sender	Type the email address of the sender.
Recipients	Type the email address of the recipient. Separate multiple recipients with semi-colons.
Subject	Type the subject of the email.
Body	Type the body text of the email.

17. Click **OK** to email the document.

Creating a Document

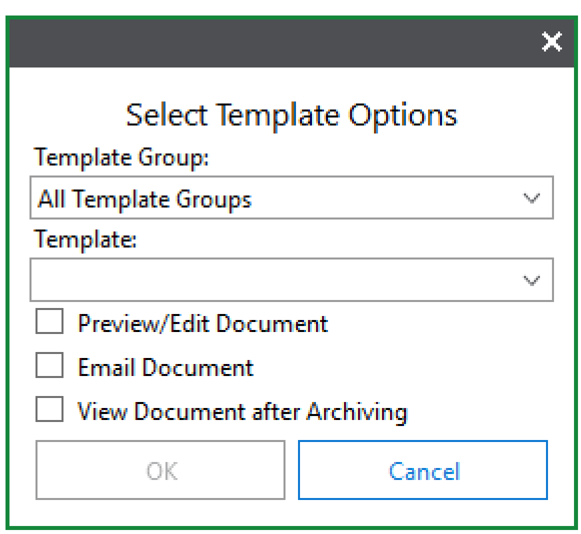
Documents are created from templates configured with Placeholders to pull in necessary information from OnBase.

To create a document:

1. Retrieve a source document or WorkView object from which you will create a document.
   Documents can be retrieved using Document Retrieval or from the Folders window.
2. Right-click on the document and select **Compose Document**, or click the **Document** button from a WorkView object and select **Compose**:

   Note the following:
   - When using the HTML-only Web Client with Microsoft Internet Explorer, users are unable to preview or edit documents composed from a WorkView object using the Compose button.
   - When using Document Composition with the HTML-only Web Client, the Document Composition tab is not available when previewing a composed document. To proceed, you must close the preview and confirm or discard your changes.
   - The **Redo** and **Print** options are not available in the HTML-only Web Client.
   - The **Email Document** check box is not available in the HTML-only Web Client.
3. If prompted, enter your login credentials.
4. The **Select Template Options** dialog box is displayed:



5. Select a template group from the **Template Group** drop-down list, or type the name of a template group. Selecting a template group is helpful when you have access to many templates.
6. Select a template from the **Template** drop-down list, or type the name of a template. If you selected a template group, only the templates that belong to the selected template group are displayed.
7. Depending upon your configuration, you may or may not be able to select from the following check boxes in the **Select Template Options** dialog box:

Option	Description
Preview/Edit Document	Select to view and/or edit the document before importing it into OnBase. **Note:** The composition preview is disabled if the template being composed contains secured Placeholders you do not have access to view, such as secured Unity Form Field or Unity Form Section Placeholders or security masked Keyword Placeholders.
Email Document	Select to create an email notification after the document has been created and archived in OnBase. If the template being used to generate the document is configured to automatically send an email notification after a document is generated, you do not need to select this check box. The email notification will be sent according to the template configuration. If the template is configured to automatically send an email notification, selecting this check box allows you to send an additional email notification. **Note:** The **Email Document** check box is only available to users that are able to send External Mail in OnBase.
View Document after Archiving	Select to view the document after it has been archived in OnBase.

8. Select **OK** to begin creating the document, or **Cancel** to exit.
9. You may be required to enter information in a prompt or an E-Form. If so, type in the provided field and click **Accept** or **Submit**.
10. If **Preview/Edit Document** was not selected, skip to step 13.

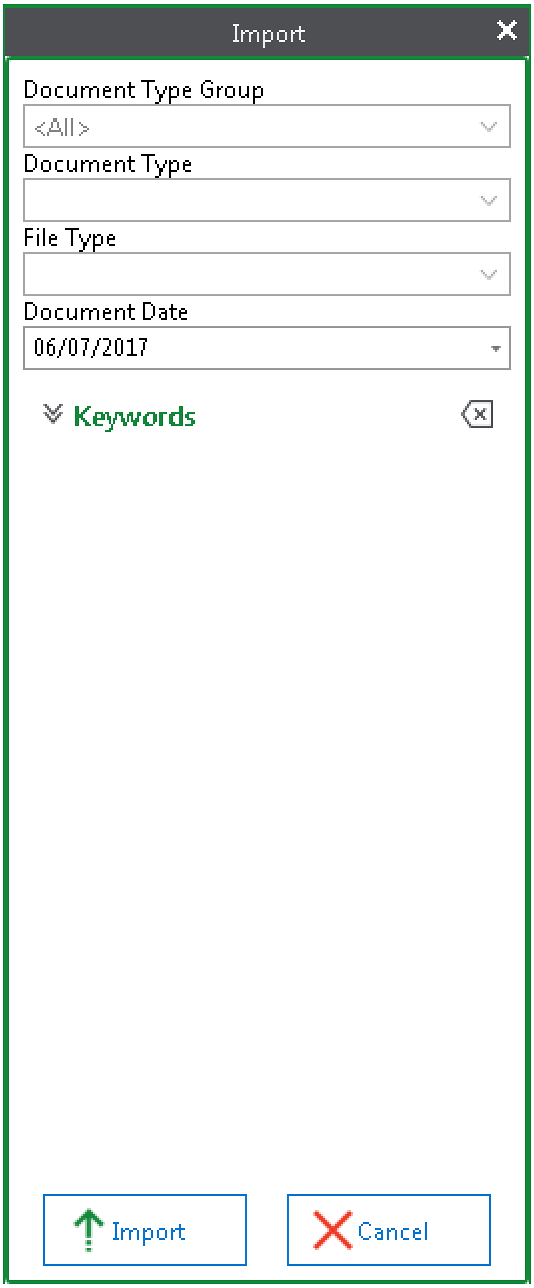
    If **Preview/Edit Document** was selected, the document is displayed. Depending on your configuration, the template may be displayed as read-only.
11. Modify the document if necessary.

Note: If you modify Keyword Values Document Composition scraped from the line-of-business application that appear in the document, only the original scraped Keyword Values will be used when uploading the document.

12. Select from the following buttons on the **Document Composition** tab:

Button	Description
Accept	Saves the document.
Redo	Starts the document creation process over from the beginning.
Cancel	Discards the document.
Print	Prints the document. **Note:** The **Print** button is only enabled for User Groups with **Print** privileges.

13. After clicking **Accept**, the **Import** dialog box is displayed:

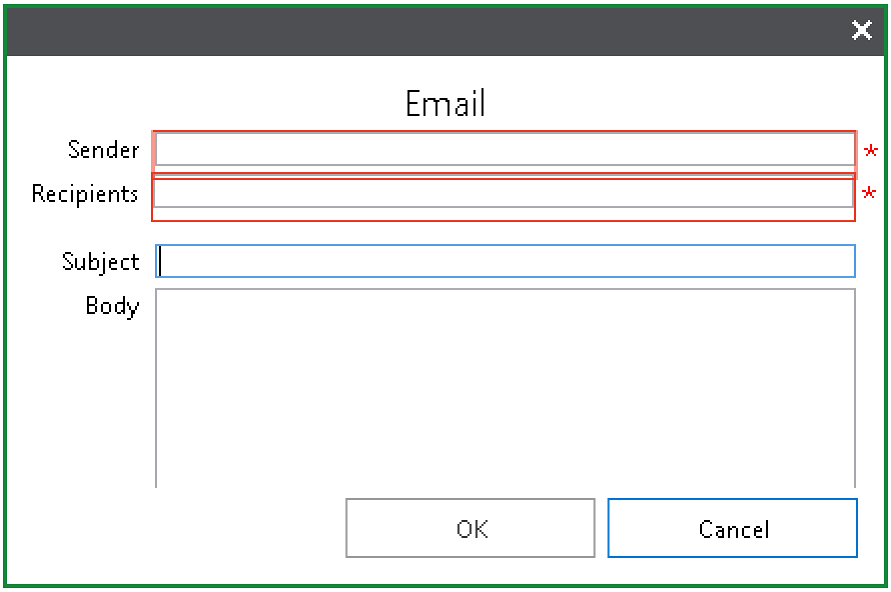


The Keyword Values Document Composition scraped from the line-of-business application are displayed. Specify additional Keyword Values if necessary, and supply any other necessary values to index the document.

Note: The **Import** dialog box may display multiple instances of the same Keyword Value. However, continuing to import the document saves only one instance of the value.

14. Click **Import**. The document is imported to OnBase.

15. If you selected **Email Document**, the **Email** dialog box is displayed:



16. Specify the following on the **Compose** tab:

Field	Description
Sender	Type the email address of the sender.
Recipients	Type the email address of the recipient. Separate multiple recipients with semi-colons.
Subject	Type the subject of the email.
Body	Type the body text of the email.

17. Click **OK** to email the document.

Creating a Document

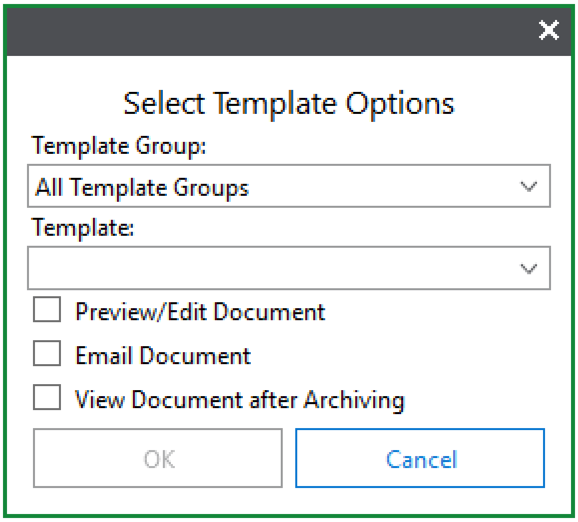
Documents are created from templates configured with Placeholders to pull in necessary information from OnBase.

To create a document:

1. Retrieve a source document, WorkView object, or WorkView filter from which you will create a document. Documents can be retrieved using Document Retrieval or from the Folders window.
2. For a document, click **Compose Document** from the **Documents** tab. You can also right-click on the document and select **Compose Document**.

   For an open WorkView object, click **Compose** from the object's main tab.

   For one or more WorkView objects in a filter, select the desired object(s). Click **Compose Document** from the **Filter** tab.
3. The **Select Template Options** dialog box is displayed:



4. Select a template group from the **Template Group** drop-down list, or type the name of a template group. Selecting a template group is helpful when you have access to many templates.
5. Select a template from the **Template** drop-down list, or type the name of a template. If you selected a template group, only the templates that belong to the selected template group are displayed.

6. Depending upon your configuration, you may or may not be able to select from the following check boxes in the **Select Template Options** dialog box:

Option	Description
Preview/Edit Document	Select to view and/or edit the document before importing it into OnBase. **Note:** The composition preview is disabled if the template being composed contains secured Placeholders you do not have access to view, such as secured Unity Form Field or Unity Form Section Placeholders or security masked Keyword Placeholders.
Email Document	Select to create an email notification after the document has been created and archived in OnBase. If the template being used to generate the document is configured to automatically send an email notification after a document is generated, you do not need to select this check box. The email notification will be sent according to the template configuration. If the template is configured to automatically send an email notification, selecting this check box allows you to send an additional email notification. **Note:** The **Email Document** check box is only available to users that are able to send External Mail in OnBase.
View Document after Archiving	Select to view the document after it has been archived in OnBase.

7. Select **OK** to begin creating the document, or **Cancel** to exit.
8. You may be required to enter information in a prompt or an E-Form. If so, type in the provided field and click **Accept** or **Submit**.
9. If **Preview/Edit Document** was not selected, skip to step 12.

   If **Preview/Edit Document** was selected, the document is displayed. Depending on your configuration, the template may be displayed as read-only.
10. Modify the document if necessary.

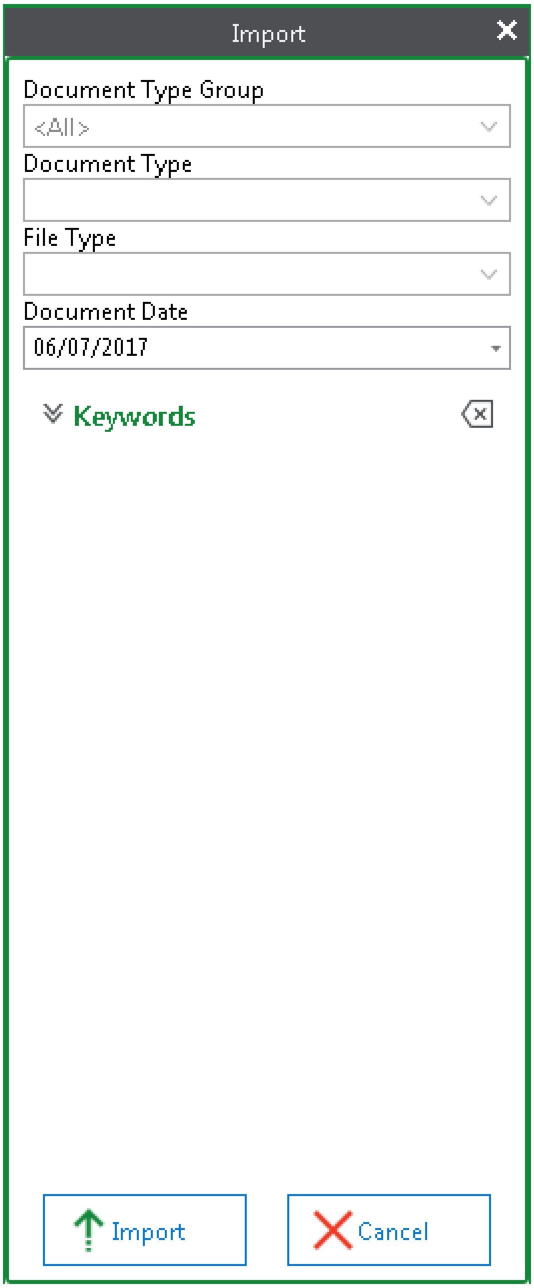
Note: If you modify Keyword Values Document Composition scraped from the line-of-business application that appear in the document, only the original scraped Keyword Values will be used when uploading the document.

11. Select from the following buttons on the **Document Composition** tab:

Button	Description
Accept	Saves the document.

Button	Description
Redo	Starts the document creation process over from the beginning.
Cancel	Discards the document.
Print	Prints the document. **Note:** The **Print** button is only enabled for User Groups with **Print** privileges.

12. After clicking **Accept**, the **Import** dialog box is displayed:



The Keyword Values Document Composition scraped from the line-of-business application are displayed. Specify additional Keyword Values if necessary, and supply any other necessary values to index the document.

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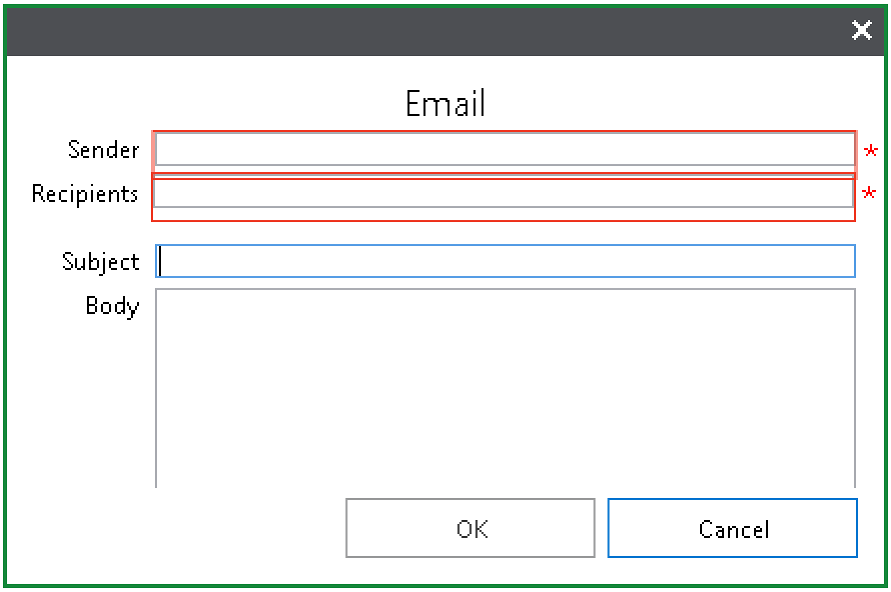
14. If you selected **Email Document**, the **Email** dialog box is displayed:



15. Specify the following on the **Compose** tab:

Field	Description
Sender	Type the email address of the sender.
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Subject	Type the subject of the email.
Body	Type the body text of the email.

16. Click **OK** to email the document.