



# Application Enabler

## Reference Guide

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*Includes:*

Installation Guide

Administration Guide

User Guide

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Document Name .....Application Enabler  
Department/Group ..... Documentation  
Revision Number .....Foundation EP5

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## APPLICATION CLIENT CONNECTOR

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Application Enabler provides a way to seamlessly integrate an organization's core line-of-business applications with OnBase. This integration is done without costly, custom programming. Configuration is a point-and-click process. Businesses can extend the value of their investment in their 32-bit or 64-bit line-of-business applications with Application Enabler, since Application Enabler brings OnBase functionality directly to these applications.

Application Enabler improves employee efficiency by getting the user the information they need faster, and in the context they need it. With Application Enabler, users can perform the tasks they need to directly from their line-of-business application. This includes retrieving documents and folders from OnBase, indexing documents, creating forms, and accessing Workflow. Application Enabler Live allows users to perform real-time document retrieval from an enabled line-of-business application.

## Applications

### Retrieval

Application Enabler makes it possible to retrieve OnBase content directly from key line-of-business applications. For example, an accounting system could be configured to retrieve invoices stored in OnBase, allowing users to more easily verify correct billing. Since APIs are not used, there are no compatibility issues linked to the line-of-business application version. Integration is easy to implement and virtually transparent to users. The only indication that Application Enabler is running is an icon in the system tray.

### Indexing

Application Enabler's indexing capabilities allow you to index OnBase documents directly from the line-of-business application, eliminating the need to re-key index information into OnBase.

### Form Creation

Application Enabler's form creation capabilities allow you to create E-Forms or Unity Forms based on information in the line-of-business application. These forms can then be routed through OnBase Workflow in order to drive the overall business process.



## Cross-Departmental Access / Central Data Repository

Application Enabler allows users to access data across the departmental boundaries imposed by separate line-of-business applications. Since OnBase is used as a central data repository, departments can share content, regardless of the application they are using. Multiple applications can be enabled to access OnBase content, allowing (for example) the Accounting department to access content from a frequently used accounting application and the Human Resources department to access the same content through a different application.

Application Enabler works by linking data in line-of-business application fields, or text on a text screen, to related information in the OnBase database.

## Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Application Enabler 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.

## Legacy Licensing

Application Enabler requires one of the following database licenses:

- Application Enabler
- Enterprise Application Enabler

A Named Client, Concurrent Client, or Workstation Client license is consumed when logging on to OnBase to use Application Enabler. A Named Client, Concurrent Client, or Workstation Client license is consumed when Application Enabler Live is enabled.

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**Note:** It is highly recommended for the sale of Application Enabler that the user's application be pre-qualified by a certified OnBase representative. This is done to ensure the customer is aware of exactly what level of integration can be achieved in their environment.

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# **Application Enabler**

## **Installation Guide**

## Requirements

The following sections outline requirement information specific to Application Enabler in OnBase Foundation EP5.

### General Requirements

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

- Supported Desktop Operating Systems
- Unity Client Platform Hardware Requirements
- Unity Client Browser Requirements
- Server C++ Requirements
- Microsoft .NET Framework Requirements
- Databases Supported
- 64-Bit Support Statement
- Windows User Account Control Statement
- Modifying Configuration Files

### Licensing

See [Licensing on page 2](#) for licensing requirements.

### Application Enabler User Account Control Statement

Application Enabler is supported when Windows UAC is enabled. However, to use Application Enabler when Windows UAC is enabled, your enabled third-party applications are required to be running at the same UAC level as Application Enabler. If you are enabling an HTML-based application, Internet Explorer's **Enable Protected Mode** option cannot be selected. When this option is not selected, Internet Explorer runs at the default UAC level, which is also the same level as Application Enabler.

## 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.

In Application Enabler, the following contexts are supported only with IP-based load balancing:

- AE - FolderPop
- Application Enabler - Retrieve Deficiencies
- Application Enabler - Patient Window

Other Application Enabler contexts are supported with both cookie-based and IP-based load balancing.

## Application Enabler and Data Execution Prevention (DEP)

Data Execution Prevention, or DEP, is a Windows feature that prevents execution of code from places where it should not be executed. DEP is a feature of Windows operating systems that was introduced with Windows Server 2003 SP1 and Windows XP SP2.

When DEP is enabled, add the **AEConfig.exe** and **Obunity.exe** files to the DEP Whitelist in order to create the font database necessary to use Application Enabler's OCR functionality. If you are using Application Enabler's OCR functionality, disable DEP or configure DEP with the **Turn on DEP for all programs and services except those I select** radio button selected. Add the **AEConfig.exe** and **Obunity.exe** files to the subsequent list.

## Line-of-Business Application Requirements

Application Enabler should be run under the same Windows user account as the line-of-business application. When Application Enabler and the line-of-business application are running under two different Windows user accounts, Application Enabler will not function.

---

**Note:** Application Enabler OCR functionality cannot be used when **ClearType** is selected from the **Use the following method to smooth edges of screen fonts** drop-down list in Windows display settings. For this reason, whenever you use Application Enabler OCR functionality, Application Enabler automatically disables this setting. Application Enabler does not re-enable this setting. For information on enabling this setting, see the Windows help files.

---

## Windows Applications

- Applications must use ActiveX® Edit controls that communicate to the Windows API.
- Controls must be active.
- Applications must use the Windows API.

## Text-Based Applications

- Applications must use standard copy-to-clipboard functionality.
- Keyword Values must always be in the same position on the screen.
- Applications must use the Windows API.

## HTML-Based Applications

- HTML Applications must use HTML code.
- The data must be in either a tag - value pair or in a non-nested table format.
- Hidden values can be seen as long as they adhere to the above requirements.
- Values can not be generated by most scripts or applets.
- The application must be running in a web browser supported by OnBase.

To enable applications using the Firefox or Opera browsers, configure the application as a Smart-Screen application. Other web browsers can only be used if Silverlight or WPF applications are embedded inside of the host browser. To enable these types of applications, configure the application as a Smart-Screen application. For more information on Smart-Screen configuration, see the section on enabling Smart-Screen applications in the **Application Enabler** module reference guide.

## Java-Based Applications

In order to enable Java-based applications, Java Access Bridge and Java Virtual Machine must be installed. These two must be compatible with each other. Consult Oracle's compatibility documentation for more information.

The following versions of Java Access Bridge are supported:

Java Access Bridge Version	Important Notes
1.0.2	
1.2	
2.0.1	Java Access Bridge 2.0.1 is recommended for any client machines (32-bit only) on which the Java application is running under Java Runtime Engine 1.5 or earlier. The compatibility for Java Access Bridge 2.0.1 is available at: <a href="http://www.oracle.com/technetwork/java/javase/documentation/compatibility-137109.html">http://www.oracle.com/technetwork/java/javase/documentation/compatibility-137109.html</a>

Java Access Bridge Version	Important Notes
2.0.2	Java Access Bridge 2.0.2 is required on any 64-bit client machines. It only supports Java Runtime Engine 1.5, 1.6, and 1.7.
2.0.3	Java Access Bridge 2.0.3 is included with Java Runtime Engine 1.7u6 (JRE 7u6) and later. By default, Java Access Bridge is not enabled. To enable Java Access Bridge in this situation, refer to Oracle's instructions available at: <a href="http://docs.oracle.com/javase/7/docs/technotes/guides/access/enable_and_test.html">http://docs.oracle.com/javase/7/docs/technotes/guides/access/enable_and_test.html</a>
2.0.4	Java Access Bridge 2.0.4 is included with Java Runtime Engine 1.8u11 (JRE 8u11) and later. By default, Java Access Bridge is not enabled. To enable Java Access Bridge in this situation, refer to Oracle's instructions available at: <a href="http://docs.oracle.com/javase/8/docs/technotes/guides/access/enable_and_test.html">http://docs.oracle.com/javase/8/docs/technotes/guides/access/enable_and_test.html</a>

The following Java Virtual Machine versions are supported: JDK 1.1.8 and higher.

## Dynamics GP Applications

- Dynamics GP 9.0 or greater must be installed.

## Pre-Installation

An OnBase Application Server is required for Application Enabler configuration.

## Application Enabler Configuration Installation

The **Hyland Application Enabler Configuration** installer installs the configuration portion of Application Enabler. The Application Enabler client-side component is installed separately using the Unity Client installer.

## Installer Requirements

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

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

---

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

---

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

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

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

ClickOnce deployments also have the following advantages:

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

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

---

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

---

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

---

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

---

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

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

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

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using **\**. For example: **setup.exe /q /CompleteCommandArgs "INSTALL\_PROPERTY=\"my value\" INSTALL\_PROPERTY\_2=\"my value 2\""**.

---

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

---

## Installer Prerequisites

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

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

---

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

---

## Installer User Permissions

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

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



## Installer .NET Framework Requirements

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

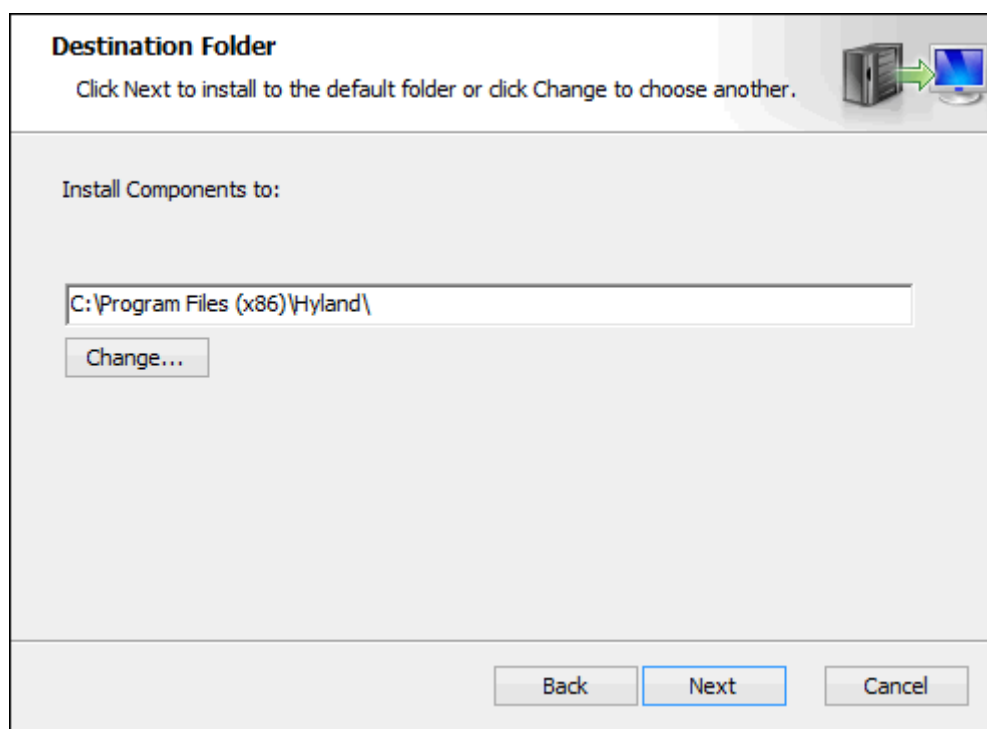
OnBase requires Microsoft .NET Framework 4.7.2 or later. The .NET Framework can be obtained from the Microsoft Download Center at <http://www.microsoft.com/downloads>.

## Running the Installer

Launch the Application Enabler Configuration installer by executing **setup.exe**. This executable is usually located in the **\install\Application Enabler Configuration\** folder of your source installation files.

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

1. The Hyland Application Enabler Configuration installation welcome dialog is displayed.
2. Click **Next**. The **Destination Folder** dialog box is displayed.



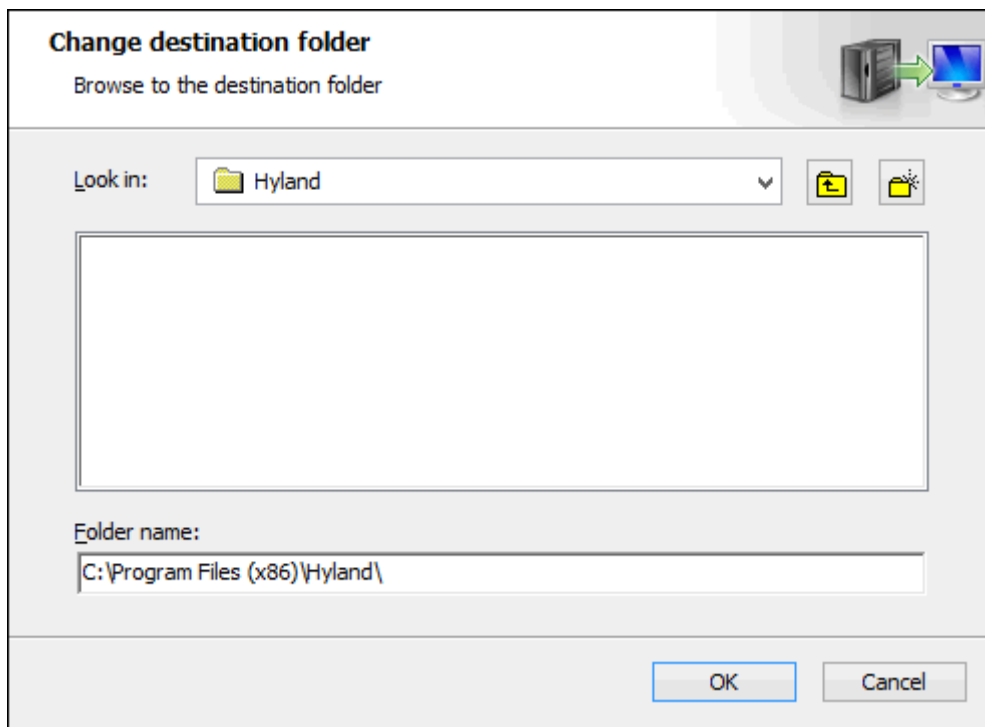
3. Enter the top-level installation directory in the field provided, or click **Change** to browse to it.

---

**Note:** This location does not affect components not installed under the top-level directory. If the installer provides for the installation of multiple components, the specific installation locations of each component can be changed later in the installation process.

---

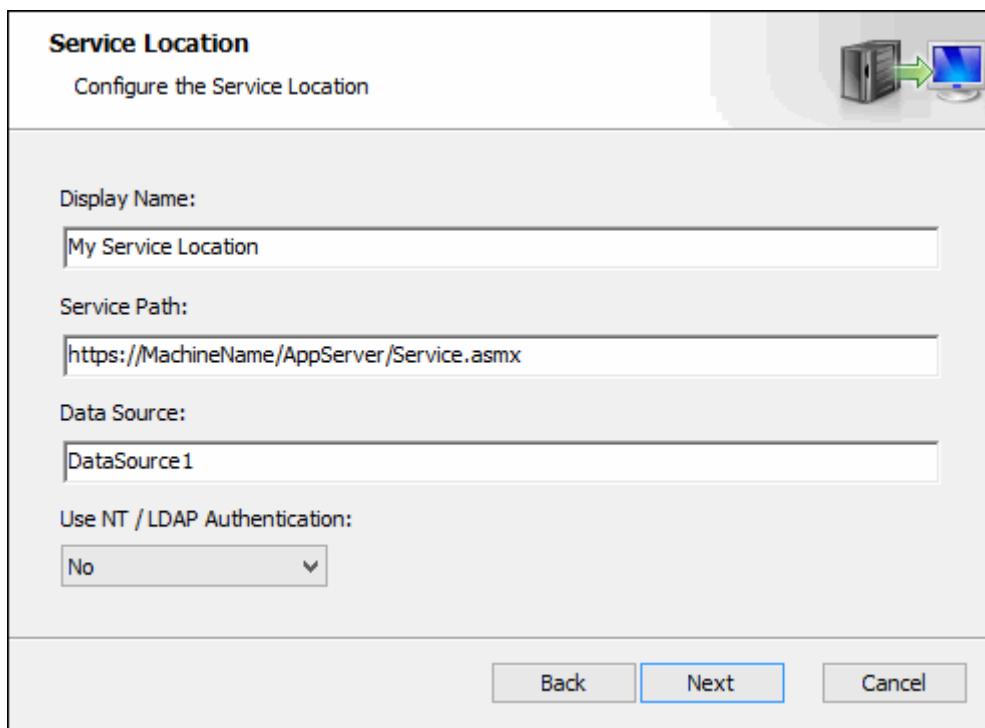
If **Change** is clicked the **Change destination folder** dialog box is displayed.



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

If the Destination Folder is not changed, the default location is used.

4. Click **Next**. The **Service Location** dialog is displayed.



The image shows a 'Service Location' configuration window. At the top, it says 'Service Location' and 'Configure the Service Location'. There is an icon of a server and a monitor with a green arrow pointing from the server to the monitor. Below this, there are four text input fields: 'Display Name:' with the value 'My Service Location', 'Service Path:' with the value 'https://MachineName/AppServer/Service.aspx', 'Data Source:' with the value 'DataSource1', and 'Use NT / LDAP Authentication:' with a dropdown menu showing 'No'. At the bottom right, there are three buttons: 'Back', 'Next', and 'Cancel'.

5. In the **Display Name** field, enter a user-friendly name for the service location.
6. In the **Service Path** field, enter the full URL to the **Service.aspx** page on the OnBase Application Server. For example, **https://MachineName/AppServer/Service.aspx**.

---

**Note:** Ensure that the **Service Path** reflects the configuration of the OnBase Application Server in regard to HTTPS bindings. If the Application Server is not configured to use HTTPS, setting the Service Path to HTTPS in this installer does not configure an HTTPS binding on the OnBase Application Server.

---

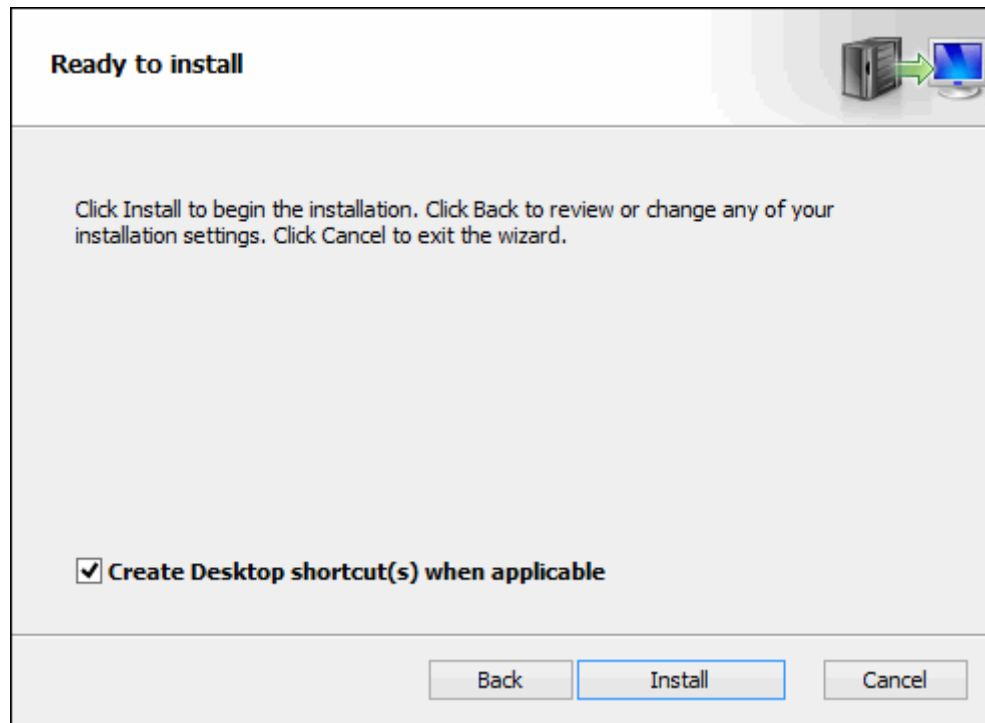
7. In the **Data Source** field, enter the data source name this component will use to connect to OnBase.
8. Select **Yes** from the **Use NT / LDAP Authentication** drop-down list if your system uses Active Directory or LDAP Authentication, otherwise select **No**.

---

**Note:** In order to use Active Directory or LDAP authentication, the database against which the installed component runs must be separately configured for Active Directory or LDAP authentication. This installer configures the installed components to match the authentication scheme of the database but does not configure Active Directory or LDAP.

---

9. Click **Next**. The **Ready to install** dialog is displayed.



10. Select **Create Desktop shortcut(s) when applicable** to create shortcuts to the installed components in the Windows **Start | All Programs | Hyland** menu, on the Windows desktop, or in both locations, when applicable.
11. Click **Install** to continue with the installation, or click **Cancel** to cancel the installation.
12. When the installation is complete, click **Finish**.

---

**Tip:** In order to ensure that the required system settings take effect, it is a best practice to restart the installing machine once the installer has finished.

---

## 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
<b>Change</b>	<p>Add or remove components using the <b>Custom Setup</b> dialog.</p> <hr/> <p><b>Note:</b> This option is not available if the installer has no independently selectable features.</p> <hr/> <p>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.</p> <hr/> <p><b>Note:</b> <b>Change</b> does not allow you to alter configuration options originally set during a previous installation of components contained in the installer.</p> <hr/>
<b>Repair</b>	<p>Repair errors in the most recent installation of the component, such as missing and corrupt files, shortcuts, and registry entries.</p> <hr/> <p><b>Note:</b> This option is not available from all installers. <b>Repair</b> 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.</p> <hr/>
<b>Remove</b>	Removes all previously installed components.

## Running the Installer from the Command Line

You can control the installation of components from the command line by passing its feature name to the installer using the **ADDLOCAL** property. The values of the configuration options available in the graphical installation wizard are passed to the installer using the property names associated with the installer options.

This section describes the feature names and properties associated with this installer.

---

**Note:** Feature and Property names are case sensitive.

---

## Feature Names

To install Application Enabler Configuration, the value of the **ADDLOCAL** property is **Application\_Enabler\_Config**.

The **ADDLOCAL** property is added to the installation command line, as shown here:

```
msiexec /i "Hyland Application Enabler Configuration.msi"
ADDLOCAL=Application_Enabler_Config
```

## Properties

When controlling the installation of components from the command line you must also configure the settings for each component you are installing by using the properties listed in the following table. If a property is not included, the default value is configured for that property.

Property	Description
<b>APPLICATIONENABLER_FILES</b>	<p>The location to which the component files are installed. By default, this component is installed to <b>C:\Program Files\Hyland\Application Enabler\</b></p> <p>For example:  <b>APPLICATIONENABLER_FILES="C:\My\Custom\Location\Application Enabler\"</b></p> <hr/> <p><b>Note:</b> Application Enabler Configuration is always installed to the <b>Config</b> subfolder of the location entered.</p> <hr/>
<b>CREATE_DESKTOP_SHORTCUTS</b>	<p>Set to <b>1</b> to add desktop shortcuts for the installed component, or leave empty to not add the shortcuts. By default, this property is empty.</p> <p>For example: <b>CREATE_DESKTOP_SHORTCUTS="1"</b> or <b>CREATE_DESKTOP_SHORTCUTS=""</b></p>
<b>CREATE_MENU_SHORTCUTS</b>	<p>Set to <b>1</b> to add program menu shortcuts for the installed component, or leave empty to not add the shortcuts. By default, this property is empty.</p> <p>For example: <b>CREATE_MENU_SHORTCUTS="1"</b> or <b>CREATE_MENU_SHORTCUTS=""</b></p>

Property	Description
<b>SERVICE_LOCATION_DATA_SOURCE</b>	<p>The ODBC connection for the data source installed components use to connect to OnBase.</p> <p>For example:  <b>SERVICE_LOCATION_DATA_SOURCE="ODBC source name"</b></p> <hr/> <p><b>Note:</b> This property is required. The default value, if available, is defined by previously installed components and may not be acceptable for the current installation.</p> <hr/>
<b>SERVICE_LOCATION_DISPLAY_NAME</b>	<p>A user-friendly name for the service location. By default, this property is set to <b>New Service Location</b>.</p> <p>For example:  <b>SERVICE_LOCATION_DISPLAY_NAME="My Service Location"</b></p>
<b>SERVICE_LOCATION_NT_AUTH</b>	<p>Set to <b>true</b> if your system uses NT/LDAP authentication, or set to <b>false</b> if it does not. By default, the <b>SERVICE_LOCATION_NT_AUTH</b> property is set to <b>false</b>.</p> <hr/> <p><b>Note:</b> In order to use NT or LDAP authentication, the database against which the installed component runs must also be configured for NT or LDAP authentication. The installer configures the installed component to match the authentication scheme of the database.</p> <hr/> <p>For example:  <b>SERVICE_LOCATION_NT_AUTH="false"</b></p>
<b>SERVICE_LOCATION_SERVICE_PATH</b>	<p>The full URL to the <b>Service.asmx</b> page on the OnBase application server.</p> <p>For example:  <b>SERVICE_LOCATION_SERVICE_PATH="http://MachineName/AppServer/Service.asmx"</b></p> <hr/> <p><b>Note:</b> This property is required. The default value, if available, is defined by previously installed components and the location of the default Web site, which may not be acceptable for the current installation.</p> <hr/>

Properties are added to the installation command line, as shown here:

```
msiexec /i "Hyland Application Enabler Configuration.msi"  
ADDLOCAL=Application_Enabler_Config SERVICE_LOCATION_DATA_SOURCE="My ODBC"  
SERVICE_LOCATION_SERVICE_PATH="http://MyMachineName/AppServer/Service.asmx"
```

## Application Enabler Installation

Application Enabler can be installed using a ClickOnce deployment, or by using the Hyland Unity Client Installer. For information on both methods of installation, see the **Unity Client** module reference guide.

Application Enabler Configuration is not installed through either method of installation. For more information on installing Application Enabler Configuration, see [Application Enabler Configuration Installation on page 7](#).

---

**Note:** For information regarding how to install Application Enabler for use with Citrix, please see the Application Enabler section of the Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide.

---

## Installation Requirements for Applications Using Named Pipes

The **Hyland.Applications.AppEnabler.Connector.dll** file must be placed in the same directory as applications that use a named pipes connection. Currently, these include the OnBase Client, Bar Code Generator, RAC contexts, and AE Retrieval Viewer.

The **Hyland.Applications.AppEnabler.Connector.dll** file must also reside in the location where Application Enabler is installed. This file is automatically placed in this directory when Application Enabler is installed.

## Command Line Switches

### Application Enabler CommServer Mode

The following switches can be appended to the Application Enabler shortcut **Target** command line to enable Client CommServer Mode:

#### -AECOMM

**-AECOMM** enables the ability to query to the OnBase Client using a third party application. This switch launches the AppEnabler Communication Server when the Client is launched and registers itself as a listener (without launching Application Enabler).

These switches only work if Application Enabler is registered with the OS (/regserver) and the OnBase Client has been licensed for Application Enabler.



Using this switch connects over COM and does not attempt to launch Application Enabler. This switch supports the **OnBase Client - Retrieve Documents**, **OnBase Client - Index**, and **OnBase Client - Cancel Index** contexts.

## -AELEGACY

**-AELEGACY** also provides COM connection. The difference between **-AELEGACY** and **-AECOMM** is that **-AELEGACY** auto launches Application Enabler and it supports the OnBase Client command line switches for Application Enabler Configuration.

## Bar Code Generator

The following switches can be appended to the Bar Code Generator shortcut **Target** command line:

### -AE:COMM

**-AE:COMM** enables the Bar Code Generator to listen for COM-based events using the AECOMMServer instead of over a named pipe connection. This switch is required in order to generate bar codes using the Run Script context.

This switch requires that AECOMMServer.exe is registered and deployed on the operating system.

## OnBase Client

The following switches can be appended to the OnBase Client shortcut **Target** command line:

### -AE

**-AE** enables both OnBase Client indexing mode and enabled OnBase Client retrieval mode.

### -AE:INDEX

**-AE:INDEX** enables OnBase Client indexing mode.

### -AE:RETRIEVE

**-AE:RETRIEVE** enables OnBase Client retrieval mode.

---

**Note:** The Unity Client must be run in service mode on the client machine at least once before the OnBase Client can successfully login using the **-AE**, **-AE:INDEX**, or **-AE:RETRIEVE** switches.

---

## Unity Client

---

**Note:** If you enter an invalid switch in the Unity Client shortcut **Target** command line, you are prompted that the Application Enabler configuration file failed to load.

---

The following switches can be appended to the Unity Client shortcut **Target** command line:

### -AE:DEMO

-AE:DEMO enables Demo Mode.

For more information, see [Demo Mode on page 324](#).

### -AE:S

-AE:S enables Silent Mode.

### -AE:V

-AE:V enables the same functionality as the **Verbose enabled** attribute.

For more information, see [Verbose Mode on page 21](#).

### -AE:VT

-AE:VT enables the same functionality as the **timestamp** attribute.

For more information, see [Verbose Mode on page 21](#).

### -AE:VT,XML

-AE:VT,XML enables the same functionality as the **timestamp** and **scrapeXml** attributes.

For more information, see [timestamp on page 23](#) and [scrapeXml on page 22](#).

### -AE:VXML

-AE:VXML enables the same functionality as the **scrapeXml** attribute.

For more information, see [scrapeXml on page 22](#).

### -AE:"[full file path]"

-AE:"[full file path]" is used to load a default Application Enabler configuration file.

For more information, see [Using a Command Line Switch on page 287](#).

**-AE:AL -AE:UN="[username]" -AE:PW="[password]"**

---

**Note:** This switch is maintained for legacy purposes only.

---

**-AE:AL -AE:UN="[username]" -AE:PW="[password]"** is used to automatically login to the Desktop when retrieving documents from the Desktop.

## **-deferredlogin**

**-deferredlogin** is used to indicate that Application Enabler should run in Deferred Login Mode.

The **ServiceMode** setting in the Unity Client configuration file must be set to **true** for this command line switch to function.

---

**Note:** When using this command line switch, ensure that the switch is properly formatted in lowercase letters.

---

For more information, see [Using Contexts on page 288](#).

## **Application Enabler Configuration**

The **-DEMO** switch can be appended to the Application Enabler Configuration shortcut **Target** command line to enable Demo Mode.

## **Backup/Recovery**

After configuring the line-of-business application, make sure the **.xml** file is backed up in multiple locations. This configuration file is necessary for Application Enabler to interact with the line-of-business application. If this file is lost, the application must be reconfigured. In addition, back up any preprocess scripts that are used in the system.

Reinstall Application Enabler or any of its components that have been lost or damaged. Make sure the correct version of the software is installed. A version mismatch between Core Services and any Application Enabler component will yield unexpected results.

## **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>.

## Application Enabler Upgrade Considerations

The following information should be considered or noted when upgrading Application Enabler deployments. Read this information prior to upgrading your version of OnBase.

**General Deployment Considerations** — The following should be considered with regard to a general deployment:

- Make note of the location of the Application Enabler configuration file.

## Troubleshooting

### Cannot Start Application

**Issue** — When attempting to install a module to a client machine using a ClickOnce deployment, the **Cannot Start Application** dialog may be displayed with the message:

**Application validation did not succeed. Unable to continue.**

**Resolution** — This error occurs when a deployment file for the application is modified after the deployment was created. To resolve this error, you must create a new deployment of the application using the Deployment Wizard. See the **Updating or Adding a Deployment Instance** section of this module reference guide for details.

---

**Note:** When updating an existing deployment, make sure you select the appropriate module, as well as the **Instance Name** that corresponds to the instance that generated the error.

---

### Verbose Mode

When running in Verbose Mode, Application Enabler logs configuration information and user keystrokes to the **AEVerbose.txt** file. This file is saved in the TEMP directory, defined in the system's Environment Variables. This configuration information can be helpful during troubleshooting. Verbose Mode is for diagnostic use only. System administrators are the only users who should use Verbose Mode.

---

**Note:** You cannot open **AEVerbose.txt** while Application Enabler is open.

---

The following information is logged when Verbose is enabled:

VEvent Info

Window Handle: 0X405A6

Module Name: SHELL32.dll

```

Command Line: Explorer
HotSpot: (64,100)
Event Info
Window Handle: 0XF05D2
Module Name: MSVBVM60.DLL
Command Line: Payment.exe
HotSpot: (25,11)
Application: payment.exe
Module: msvbvm60.dll
Command Line: payment.exe
****

```

```

Application: payment.exe
Module: msvbvm60.dll
Command Line: payment.exe
****

```

```
Screen:Index: 0ID: 0Pos.: (1000,1000)
```

```
Hotspot:Index: 0ID: 0Pos.: (1000,1000)
```

The Window Handle item is the window API ID for the enabled window. The HotSpot item is the coordinates of the hotspot that the user clicked on. The Application item is the enabled application.

If you are using DDE, the following line will be present in your verbose file followed by information pertinent to the cursor position:

```
*** DDE data for cursor position ***
```

## scrapeXml

When **scrapeXML** is enabled, screen scraping information is added to the verbose file. Information pertaining to the Document Type and Keyword Types are included.

```

<SCRAPE>
  <CONTEXT name="(No Filter)" />
  <DOCTYPE id="227" name="LD - Loan Information" />
  <KEYWORD id="113" name="Loan Number" value="123456" indexonly="0" />
</SCRAPE>

```

scrapeXML is enabled by adding the **-AE:VXML** switch to the Unity Client's shortcut target line. See [-AE:VXML on page 19](#).

## timestamp

When **timestamp** is enabled, a time and date stamp to captured information is added.

10/31/2005 09:48:11

## Assorted Issues

### 1. After Installation I can log on to the Web Client, but not Application Enabler.

**Exception thrown calling Open.**

**Description is: Could not connect to data source.**

**Source is IDMDesktop:: Open**

There are several potential causes for this error.

- Invalid login information.  
Login with valid credentials and a valid ODBC source.
- Concurrent licenses exceeded.  
You cannot run the OnBase Web Client and Application Enabler at the same time using a Sybase standalone database.
- Running Application Enabler with the **-AE:DEMO** command line switch with the Web Server running on the same machine.
- The **exe\_dmwebsvcmgr** service uses a database connection that allows only one connection with a standalone database.

Once you have logged into the Web Server and wish to close it in order to log into Application Enabler, you must stop the **exe\_dmwebsvcmgr**.

- Improper termination of a program.

It may be necessary to end the DBEngine50.exe process via Windows Task Manager.

### 2. Why do errors initializing one of the ActiveX components (Select list, Retrieval dialog box, Viewer window, Keyword panel) occur?

A number of issues can prevent the ActiveX components from functioning correctly:

- Verify that Internet Explorer will permit components to initiate and use scripting.
- Verify that the correct versions of the components are installed.
- Verify that Internet Explorer does not have an earlier version installed as a web component.

### 3. Why does Application Enabler not respond well on some workstations?

Any VB application that uses Mouse Hooking Technology must be running service pack 5 or above of the Microsoft Visual Basic Runtime Engine (**Msvbvm60.dll**). See Microsoft KB Article 238672 for further information.

4. **I receive a message stating The following function generated an unknown exception: CAEClientApp::InitInstance.**

When this message is encountered, the **Hyland.Applications.AppEnabler.Connector.dll** file has not been installed in the correct location. See [Installation Requirements for Applications Using Named Pipes on page 17](#) for more information.

5. **I receive a "Textract error -992: Initialization failed" in AECClient.**

This is an issue with Application Enabler and Windows Data Execution Prevention (DEP). To resolve, follow the steps in [Application Enabler and Data Execution Prevention \(DEP\) on page 5](#).

6. **I receive a "Exception in Module: (null) - Message: Unknown error 0x800704A6" error when attempting to scrape in Demo Mode.**

This issue is caused if components of Internet Explorer that Application Enabler uses for Demo Mode became corrupt. Reinstalling Internet Explorer will resolve this issue.

7. **I receive a "Exception in Module: (null)... Function: LoadXML" error when attempting to launch Application Enabler Client.**

This issue is caused if Application Enabler is configured to load a specific XML configuration file by default, but that file is either missing, corrupt, or the user does not have permissions to it. The path to the XML configuration file can be specified in the Application Enabler executable shortcut's **Properties**. To resolve this error, verify that the XML configuration file exists, is accessible by the user(s), and is not corrupt.

8. **I cannot properly configure a line-of-business application containing buttons that appear or disappear depending on whether a field is selected.**

This issue occurs because the appearance of the button in the line-of-business application causes subsequent fields to be shifted down to accommodate the presence of the new button. To properly configure Application Enabler to handle these kinds of buttons, you must anchor the cursor by placing it in a field within the line-of-business application that does not cause a button to appear. Map the Keyword Value to the line-of-business application by clicking in the desired field. After mapping and verifying each keyword, return the cursor to the anchor location. You can also attempt to configure the line-of-business application as a smart-screen application.

9. **The dialog box to choose between multiple Document Types is inactive or appears behind the Unity Client on some Windows machines when performing the Application Enabler - Index context event when more than one Document Type is configured.**

A hotfix is available from Microsoft for this issue. See <http://support.microsoft.com/kb/943326>. With the hotfix installed, there will be fewer instances of the problem, but it still can occur.

10. **Concurrent Client licenses are still consumed even though Application Enabler users have shut down their workstations. IIS must be reset in order to release these licenses.**

This issue occurs because the workstations were shut down prior to closing Application Enabler. To resolve this issue, users must close Application Enabler prior to shutting down a workstation. You can also change the **session enableTimeout** setting to **true** in the Application Server's web.config file. This will allow the Application Server to disconnect abandoned sessions. The default interval is 20 minutes. To specify a different interval, edit the **timeout** value to reflect the number of minutes an abandoned session should remain open. The **timeout** value is located in the **sessionState** element of the Application Server's web.config. For more information on Application Server settings, see the Web Server module reference guide.

11. **When using the Unity Client with Application Enabler, a Concurrent Client license is still consumed after the Unity Client is closed with the Close button.**

This occurs because the Unity Client is still running. To close the Unity Client, right-click the system tray icon and select **Exit OnBase**.

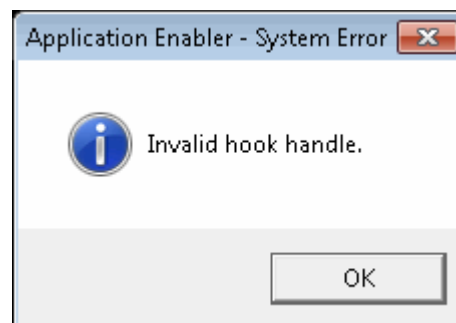
12. **Mouse and keyboard events are generating duplicate events, regardless of which configured context is being used. For example, performing the mouse event for the Barcode Rendering context generates duplicate bar code pages.**

This occurs because of the way the line-of-business application is recognizing keyboard and mouse events. To resolve this issue, enable Low Level Detection Mode in Application Enabler Configuration.

13. **A Windows-based line-of-business application is unable to be successfully configured using the Windows configuration process.**

Attempt to configure the application using the Smart-Screen configuration process. If that is unsuccessful, attempt the text-based configuration process. If that also proves unsuccessful, use Application Enabler's OCR functionality.

14. **When attempting to enable an application, an Invalid hook handle message is displayed:**



Ensure that the third-party application is running at the same UAC level as Application Enabler. If this does not work, restart Application Enabler and the line-of-business application.



15. **When using Application Enabler Live on an enabled HTML-screen, sporadic exception messages are displayed.**

Enabling **Silent Mode** can suppress these exception messages if they are not interfering with your business process. For more information about enabling **Silent Mode**, see See Application Enabler Live Configuration on page 323.

16. **I need to enable an HTML-screen, but I do not want to disable Internet Explorer's Protected Mode.**

Protected Mode does not have to be disabled for all sites in Internet Explorer, only the site that Application Enabler is enabling. This can be accomplished by adding the site to a security zone in Internet Explorer which does not have Protected Mode enabled.

For more information about Protected Mode, see <http://windows.microsoft.com/en-US/windows-vista/What-does-Internet-Explorer-protected-mode-do>.

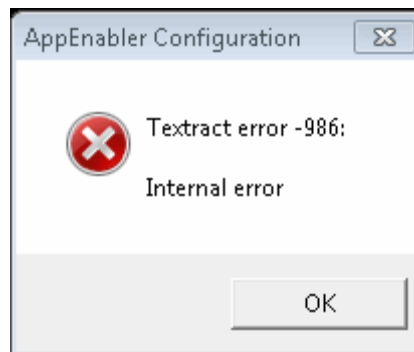
For more information about security zones in Internet Explorer, see <http://windows.microsoft.com/en-us/windows/change-internet-explorer-security-settings>.

## OCR Issues

1. **I receive an error message when attempting to use OCR functionality, or when attempting to rebuild the font database to use OCR functionality.**

When rebuilding the font database that the OCR engine requires to do OCR parsing, Application Enabler attempts to generate a file named **OCRSDK.pat** in the folder where the Application Enabler executable exists, if **OCRSDK.pat** does not already exist. If Application Enabler does not have write permission to that folder (e.g., when running the Application Enabler executable from UNC path, or when Windows UAC is enabled), an error message will be displayed and the OCR engine will not function correctly.

An example of this error message is the "Textract error -986" message displayed in the following screen shot:



To use Application Enabler's OCR functionality, Windows UAC must be disabled, and users must have write permission to the folder where the Application Enabler executable is stored. To resolve this issue, disable Windows UAC and/or open the **OCRSDK.ini** file and modify the **Database Path** attribute to point to a location where the user has write permissions.

## 2. Users are unable to use OCR functionality.

After verifying that OCR is properly configured and rebuilding the font database, you can use the following files, located in the user's **Temp** folder (i.e., **C:\Documents and Settings\[user]\Local Settings\Temp**), to continue troubleshooting:

- **AEOCRtmp\_mono.bmp** - This image file is the monochrome version of the line-of-business screen, as recognized by the Local OCR engine. If this image does not contain recognizable text, then OCR will not work for this line-of-business screen.
- **AEOCRtmp\_poly.bmp** - This image file is the polychromatic version of the line-of-business screen, as recognized by the Data Capture Server's OCR engine. If this image does not contain recognizable text, then OCR will not work for this line-of-business screen.
- **AEOCRtmp.txt** - This text file is the OCR result of the last OCR operation. It is the same as the file generated when pressing **View OCR text** during configuration. It contains the same OCR result information in the AEVERbose file.

For these files to be generated in the user's **Temp** folder, Application Enabler must have read and write permissions to this folder.

When using Application Enabler Configuration, these three files exist in the **Temp** folder until you finish configuring the screen.

When using Application Enabler on client workstations, these three files are created and immediately deleted from the **Temp** folder. They cannot be viewed unless Verbose Mode is enabled. When Verbose Mode is enabled, these three files are created and retained until you turn off Verbose Mode.

## 3. My line-of-business application's fonts are not recognized by Application Enabler's OCR functionality.

In most cases, the Application Enabler OCR engine will recognize the fonts that it needs to use by rebuilding the font database. If you find that the correct fonts are not being recognized by the Application Enabler OCR engine:

- a. Navigate to the folder where the Application Enabler executable exists.
- b. Open **OCRSDK.ini**.
- c. Add the font name(s) to the list of fonts in the **Include1** line.

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**Note:** Use the **Font Name** as shown in C:\Windows\Fonts, not the **Filename**. An asterisk can be used as a wildcard when specifying the name.

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- d. Save and close **OCRSDK.ini**.
- e. Rebuild the font database in Application Enabler Configuration during screen configuration, or in the Application Enabler's **Diagnostics** screen.

You can also edit **OCRSDK.ini** to exclude fonts if the Application Enabler OCR engine is recognizing fonts that it does not need to use when building the font database. Repeat the steps above, adding the font name(s) to the list of fonts in the **Exclude** line in the **OCRSDK.ini** file.

4. **The fonts in my line-of-business application are not recognized by Application Enabler's OCR functionality. My application is either running in Internet Explorer, or built using Internet Explorer.**

When the **Always use ClearType for HTML** Internet Explorer setting is enabled, fonts are rendered using **ClearType**, which is not recognized by Application Enabler's OCR engine. To disable this setting in Internet Explorer, select **Tools | Internet Options**. Click the **Advanced** tab. Locate the **Multimedia** section and clear the **Always use ClearType for HTML** check box. Restart Internet Explorer.

5. **I receive a "The following function generated an unknown exception: CAEConfigView::ConfigureScreen" error after clicking Rebuild Font Database in Application Enabler Configuration.**

This is an issue with Application Enabler and Windows Data Execution Prevention (DEP). To resolve, follow the steps in [Application Enabler and Data Execution Prevention \(DEP\)](#) on page 5.

## Contacting Support

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

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

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



# **Application Enabler**

## **Administration Guide**

## Configuration Overview

This section outlines items which should be configured prior to configuring Application Enabler to work with your line-of-business application.

### Configure User Groups and Rights

Users must have rights to any Document Type Groups, Document Types, Custom Queries, Folders, Document Composition Templates, WorkView Applications, Workflow Queues and Scan Queues that they will access with Application Enabler.

Rights are granted in the Configuration module. For more information, see the System Administration documentation.

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**Note:** Configured User Group Timeouts are not respected.

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### Configure Document Types, Keywords, Workflow Queues and Forms

- **Document Types** - The Document Types that will be accessed by Application Enabler need to be configured in the Configuration module prior to configuring Application Enabler.
- **Keywords** - Document Type Keywords that will be accessed by Application Enabler need to be configured in the Configuration module prior to configuring Application Enabler.
- **Workflow Queues** - If applicable, any Workflow Queues that will be accessed by Application Enabler should be configured prior to configuring Application Enabler. For Workflow Queue configuration information, see the Workflow documentation.

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**Note:** Unity Life Cycles are not supported for use with Application Enabler.

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- **Forms** - If a user will be creating E-Forms or Unity Forms in the line-of-business application, these must be configured prior to configuring Application Enabler. See the E-Forms or Unity Forms documentation for more information.

## Pre-Plan Your Configuration

To make the process of configuring Application Enabler to work with your line-of-business application as smooth as possible, it is recommended to pre-plan the following items before configuring Application Enabler:

- **What type of line-of-business application will be enabled?**  
Determine what type of line-of-business application will be enabled. Examples include Windows, Text, HTML, and Java-based applications.  
Determine whether or not the application being enabled is a 32-bit or 64-bit application. Some user options may not be available in enabled 64-bit applications. For more information, see [Enabling 64-Bit Applications on page 46](#).
- **Which line-of-business screens and hotspots will be enabled?**  
Determine which screens in the line-of-business application will be enabled, as well as which areas of the screen will be enabled to trigger scrape events.
- **Which Application Enabler contexts and keyboard/mouse events will be used?**  
Determine the contexts and keyboard/mouse events that will be used to trigger scrape events.

## Configuring the Service Location for Application Enabler Configuration

In order to configure Application Enabler to correctly connect and communicate with the Application Server when using Application Enabler Configuration, you must specify the service location. This service location was specified when you installed Application Enabler Configuration, but can be edited in the **AEConfig.exe.config** file.

---

**Note:** Multiple service locations can be made available to users by duplicating the **<ServiceLocations>** information below and specifying a different service location in each instance. When logging on, users must select their desired service location. If only one service location is specified, users are required to use that service location.

---

The following settings are configured in **AEConfig.exe.config**:

Setting	Description
<b>UseInstitution</b>	Set to <b>true</b> if you are using an institutional database with your solution.
<b>ServicePath</b>	Set to the path of the Service.asmx file within the Application Server. For example, <code>http://&lt;machinename&gt;/appserver/Service.asmx</code> .
<b>DataSource</b>	Set to the name of the ODBC connection that will be used in conjunction with Application Enabler.
<b>FriendlyName</b>	Set to the name that you want to use for your service location. For example, OnBase.

Setting	Description
<b>UseNTAuthentication</b>	Set to <b>true</b> if you are using Active Directory authentication with your solution.

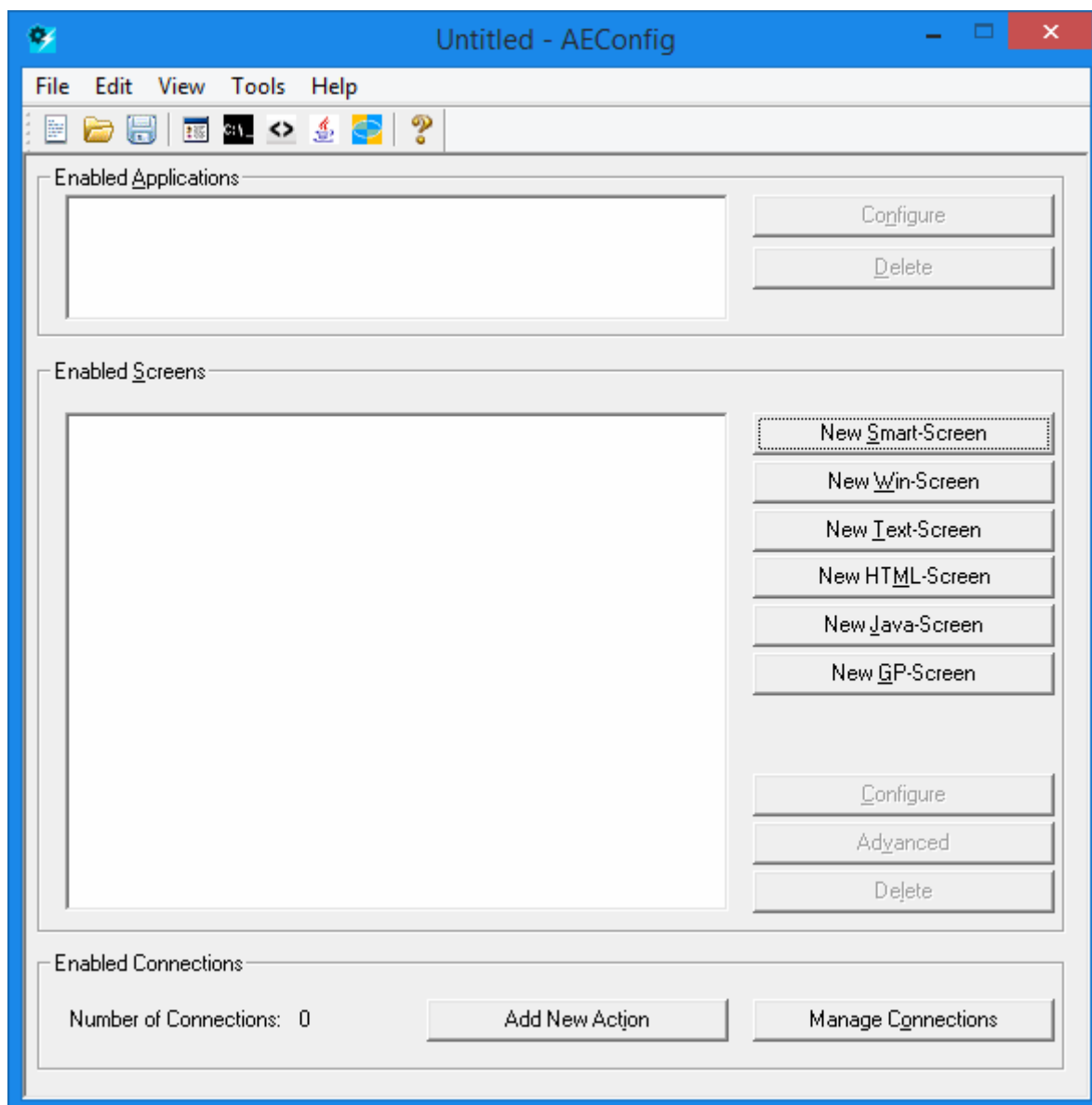
**AEConfig.exe.config** also contains the **generatePublisherEvidence** setting. For information on this setting, see [Authenticode Signature Verification on page 288](#).

## Application Enabler Configuration Interface

### Opening Application Enabler Configuration


To open Application Enabler Configuration, double-click the shortcut to Application Enabler Configuration (**AEConfig.exe**). If you do not have a shortcut on your desktop, browse out to the directory where Application Enabler Configuration was installed. In a standard installation, Application Enabler Configuration is installed in the following location: C:\Program Files\Hyland\Application Enabler\Config (32-bit operating systems) or C:\Program Files(x86)\Hyland\Application Enabler\Config (64-bit operating systems).

In the following example screen shot, no applications are currently enabled. This is how the Application Enabler Configuration screen appears when it is accessed for the first time after installation, and when Application Enabler Configuration is opened for an initial session.











## Application Enabler Configuration Toolbar Buttons

The following toolbar buttons are available in Application Enabler Configuration:

Button	Name	Description
	New	Closes the current configuration and creates a new configuration.



Button	Name	Description
	Open	Opens an existing configuration in Application Enabler Configuration.
	Save	<p>Saves the current configuration in Application Enabler Configuration.</p> <p>After saving the current configuration, Application Enabler Configuration automatically performs a health check of the configuration file. This health check helps identify configurations that may be invalid.</p> <p>For example, if you configure a retrieval or indexing context but do not configure a Document Type, you will be prompted that your configuration may be invalid.</p> <p>Any health check warnings that are presented are saved to a text file in the same location as the XML configuration file. This file is named <b>[name of XML configuration file].xml.warning.txt</b>.</p> <p>When saving, Application Enabler Configuration also checks to ensure that you have not exceeded the number of applications for which you are licensed to configure. If you have exceeded this number, you are prompted each time you save the current configuration.</p>
	Configure a new Windows screen.	<p>Initiates the configuration of a Window-based screen.</p> <p>See <a href="#">Enabling Windows Applications on page 87</a> for more information.</p>
	Configure a new Text screen.	<p>Initiates the configuration of a Text-based screen.</p> <p>See <a href="#">Enabling Text-Based Applications on page 126</a> for more information.</p>
	Configure a new HTML screen.	<p>Initiates the configuration of a HTML-based screen.</p> <p>See <a href="#">Enabling HTML-Based Applications on page 163</a> for more information.</p>
	Configure a new Java screen.	<p>Initiates the configuration of a Java-based screen.</p> <p>See <a href="#">Enabling Java-Based Applications on page 204</a> for more information.</p>

Button	Name	Description
	Configure a new Dynamics GP screen.	Initiates the configuration of a Dynamics GP screen. See <a href="#">Enabling Microsoft Dynamics GP Applications on page 239</a> for more information.
	AppEnabler Help	Opens the Application Enabler help file.

## Menu Bar

### File Menu

Option	Description
<b>New</b>	Starts a new configuration for a new application.
<b>Open...</b>	Opens an existing configuration.
<b>Save</b>	<p>Saves a configuration.</p> <p>After saving the current configuration, Application Enabler Configuration automatically performs a health check of the configuration file. This health check helps identify configurations that may be invalid.</p> <p>For example, if you configure a retrieval or indexing context but do not configure a Document Type, you will be prompted that your configuration may be invalid.</p> <p>Any health check warnings that are presented are saved to a text file in the same location as the XML configuration file. This file is named <b>[name of XML configuration file].xml.warning.txt</b>.</p> <p>When saving, Application Enabler Configuration also checks to ensure that you have not exceeded the number of applications for which you are licensed to configure. If you have exceeded this number, you are prompted each time you save the current configuration.</p>
<b>Save As...</b>	Allows you select a file name before saving the configuration.
<b># XML file</b>	Lists recently accessed configuration files.
<b>Exit</b>	Exits Application Enabler Configuration.

### Edit Menu

Option	Description
<b>Demo Mode</b>	<p>Enables Demo Mode.</p> <p>For more information, see <a href="#">Demo Mode on page 324</a>.</p>
<b>Options...</b>	<p>Opens the <b>Options</b> dialog box.</p> <p>For more information, see <a href="#">Options on page 40</a>.</p>

## View Menu

Option	Description
<b>Configuration File   as XML</b>	Opens the XML configuration file in Internet Explorer in its original XML format.
<b>Configuration File   as Text</b>	Opens a read-only text rendition of the XML configuration file in a text editor.
<b>Toolbar</b>	If this option is checked, the <b>AEConfig</b> toolbar will display beneath the menu bar. If this option is not checked, the toolbar will not display.

## Tools Menu

Option	Description
<b>Merge File...</b>	Select to merge multiple existing Application Enabler configuration files into one file. For more information about merging files, see <a href="#">Merging Configuration Files on page 317</a> .
<b>Migrate File...</b>	Select to launch the Migration Wizard to migrate an existing Application Enabler configuration to another database. For more information about migrating configuration files, see <a href="#">Migrating Configuration Files on page 318</a> .
<b>Run Health Check</b>	Select to manually perform a health check of the XML configuration file. This health check helps identify configurations that may be invalid. For example, if you configure a retrieval or indexing context but do not configure a Document Type, you will be prompted that your configuration may be invalid. Any health check warnings that are presented are saved to a text file in the same location as the XML configuration file. This file is named <b>[name of XML configuration file].xml.warning.txt</b> .

## Help Menu

Option	Description
<b>Help Topics</b>	Opens the help system with the <b>Contents</b> tab displayed.
<b>Search...</b>	Opens the help system with the <b>Search</b> tab displayed.
<b>About AEConfig...</b>	Displays program information.

## Enabling Line-of-Business Applications

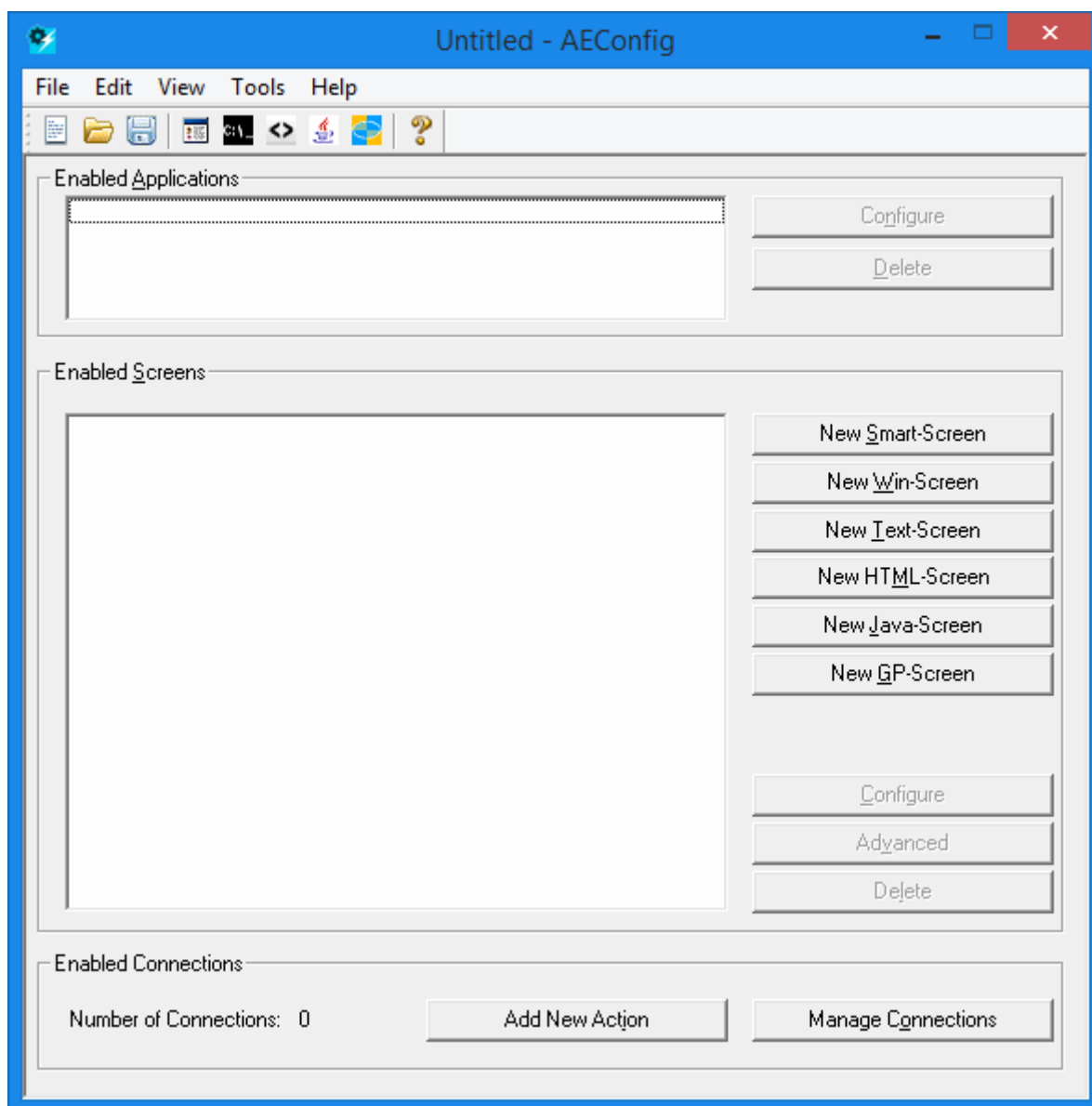
Application Enabler can be used with Silverlight, Windows Presentation Foundation (WPF), Windows-based, text-based, HTML-based, Dynamics GP, and Java-based applications. Additionally, Application Enabler can be used with either 32-bit or 64-bit applications.

The configuration can be performed on any machine running the line-of-business application that has the same screens that the users will need 'enabled.'

The steps involved in the configuration process depend on which of these types of programs you are enabling. The following describes configuration information common to these configuration types.

The **AEConfig** dialog box lists all enabled line-of-business applications. Each application's configuration information is stored in a single file with an **.xml** extension. Configuration information for multiple screens from an application can be stored in a single XML file, or each enabled application can have its own XML file. Configuration information for multiple applications can also be stored in a single XML file. Users must have Read and Execute rights to the XML configuration file.

It is possible to configure as many different applications as you have line-of-business applications. For each application, there is no limit to the number of screens that can be configured. The applications are listed in the **Enabled Applications** list in the **AEConfig** dialog box. Each screen enabled for the application selected in the **Enabled Applications** list is displayed in the **Enabled Screens** section of this dialog box:



The following sections include instructions that are specific to enabling different types of line-of-business applications:

- [Enabling 64-Bit Applications on page 46](#)
- [Enabling Smart-Screen Applications on page 46](#)
- [Enabling Windows Applications on page 87](#)
- [Enabling Text-Based Applications on page 126](#)

- [Enabling HTML-Based Applications on page 163](#)
- [Enabling Java-Based Applications on page 204](#)
- [Enabling Microsoft Dynamics GP Applications on page 239](#)

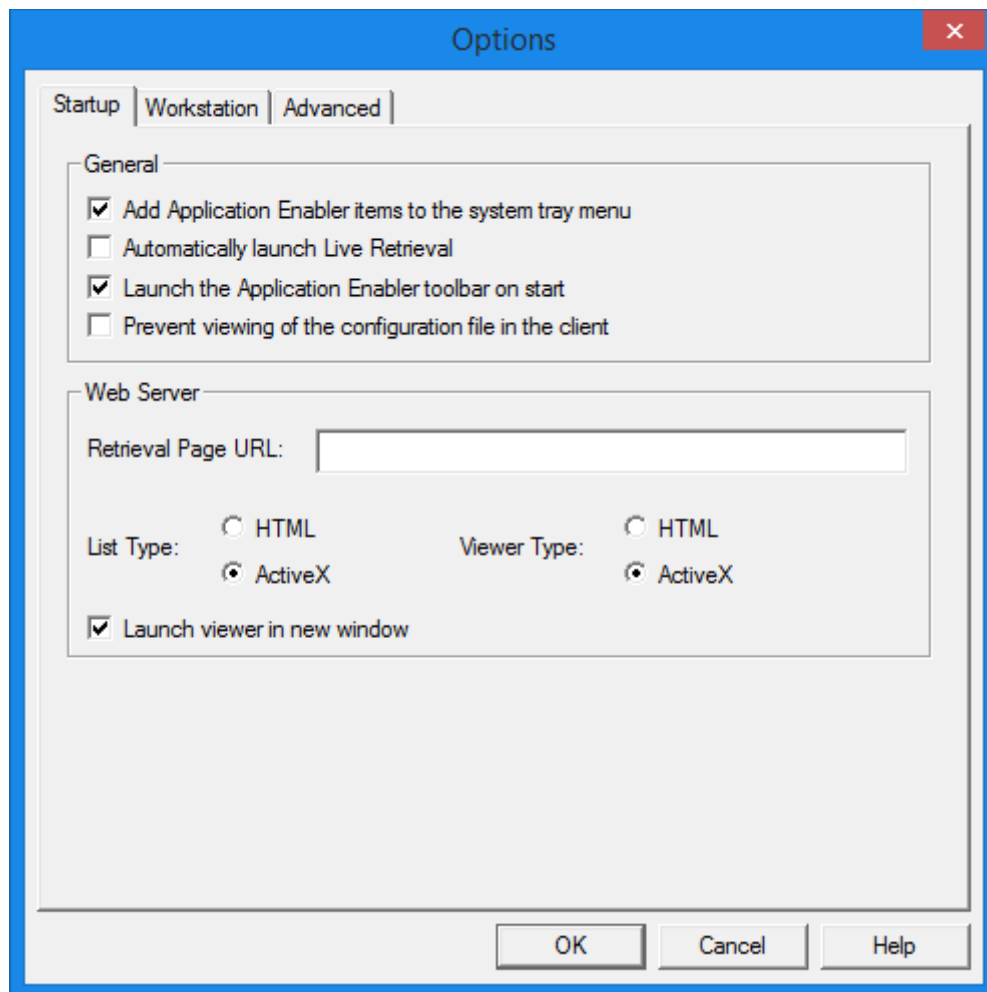
## Options

Application Enabler Configuration includes options that allow you to control certain aspects of Application Enabler's startup and display. Select **Edit | Options...** to open the **Options** dialog box.

The options available in this dialog box are discussed in the following sections:

- [Startup Tab on page 40](#)
- [Workstation Tab on page 42](#)
- [Advanced Tab on page 44](#)

## Startup Tab



The following options are available on the **Startup** tab:

General	Description
<b>Add Application Enabler items to the system tray menu</b>	When this option is selected, the Application Enabler options described in <a href="#">Working with Application Enabler on page 377</a> are available from the system tray icon.
<b>Automatically launch Live Retrieval</b>	When this option is selected, Application Enabler Live will automatically launch when a user loads a configuration file.
<b>Launch the Application Enabler toolbar on start</b>	When this option is selected, the Application Enabler toolbar will automatically launch when a user loads a configuration file or launches the Unity Client. This option is selected by default.
<b>Prevent viewing of the configuration file in the client</b>	This option prevents users from being able to see configuration file information from the client's <b>Configuration File</b> screen. When this option is selected, the Configuration File screen will not be accessible to users within the client.

Web Server	Description
<b>Retrieval Page URL</b>	<p>Web page that the line-of-business application is passing information to. This web page can parse this information and perform server-side business logic. For example, Application Enabler can specify DocPop.aspx as the page to pass information to. This can be used instead of the Desktop to address deployment and resource consumption concerns.</p> <hr/> <p><b>Note:</b> You can pass the username and password to DocPop in the query string if you desire. The format is as follows: <code>http://machinename/virtualdirectory/docpop/docpop.aspx?username=[username]&amp;password=[password]</code> If you will be using unique user names and passwords instead of a generic user name and password, you will have to configure a different XML file in this manner for every user, since the user name and password are hard-coded into the Application Enabler configuration. The enableHTTPLogin setting (this is a Docpop setting) must be set to true in the Web Server's Web.Config.</p> <hr/>



Web Server	Description
<b>List Type</b>	Select <b>HTML</b> to access a hit list using only HTML. Select <b>ActiveX</b> to access a hit list based on an ActiveX control.
<b>Viewer Type</b>	Select <b>HTML</b> to use a viewer using only HTML. Select <b>ActiveX</b> to use a viewer based on an ActiveX control.
<b>Launch viewer in new window</b>	When this option is enabled, the viewer will open a new window instance each time the viewer is launched using Docpop. When this option is not enabled, the viewer window will be reused with each launch.

## Workstation Tab

Options

Startup Workstation Advanced

Configure default workstation timer settings.

Delay Time (milliseconds)

Text Selection: 0

Screen Selection: 0

Timeout (milliseconds)

Copy to Clipboard: 1500

Screen Tabbing: 500

Clipboard Polling Interval: 10

\*These settings can only be modified when run as an administrator.

☐ Always apply these settings to all workstations

OK Cancel Help

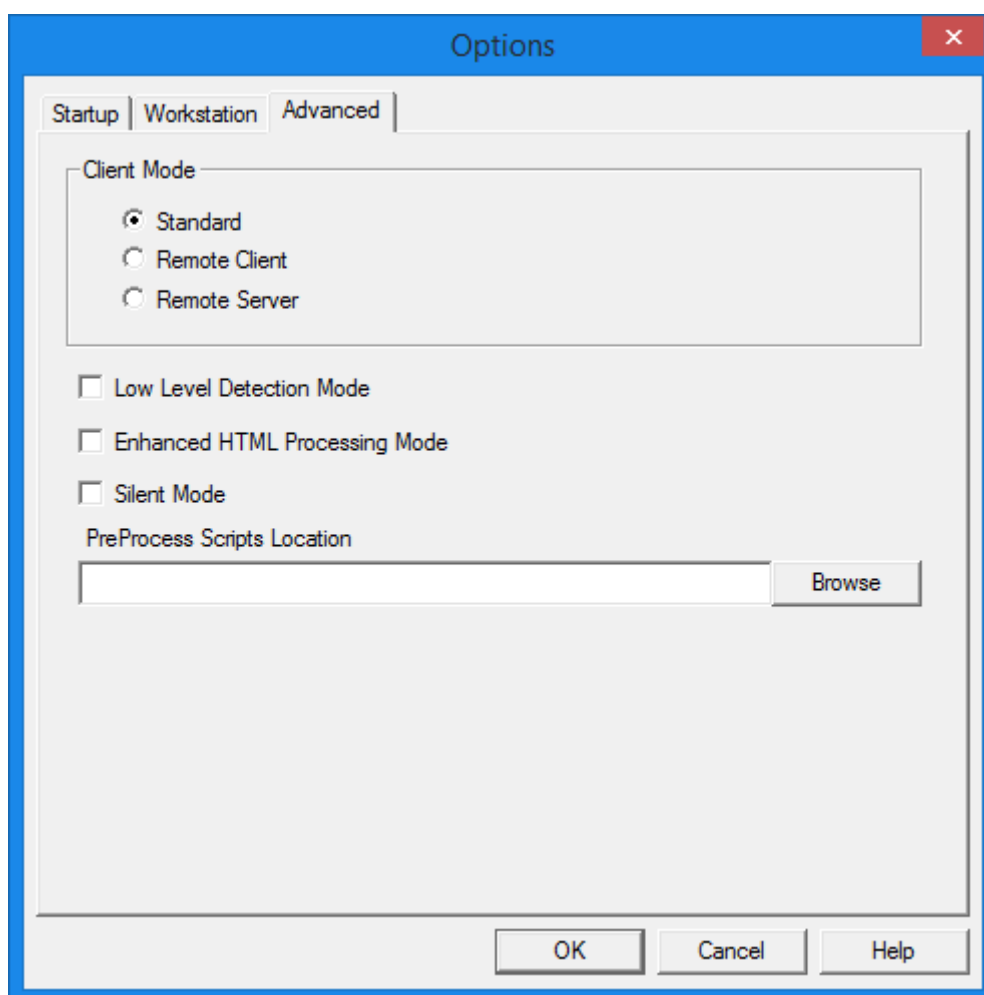
The following options are available on the **Workstation** tab:

Delay Time (milliseconds)	Description
<b>Text Selection</b>	Time needed by the line-of-business application to process the user's selection.
<b>Screen Selection</b>	Time needed by the line-of-business application to process the screen selection.

Timeout (milliseconds)	Description
<b>Copy to Clipboard</b>	Timeout for Application Enabler to watch for changes after sending a copy to clipboard command.
<b>Screen Tabbing</b>	Timeout for Application Enabler to watch for changes after sending a TAB command.
<b>Clipboard Polling Interval</b>	Number of milliseconds before Application Enabler tries to retrieve the information from the clipboard and will repeat until Copy to Clipboard times out.

The **Always apply these settings to all workstations** option causes the selected settings to be applied to all workstations that use the current configuration file. When this option is selected, workstation options cannot be changed in Application Enabler when the specific configuration file is in use.

## Advanced Tab



The following options are available on the **Advanced** tab:

Option	Description
<b>Client Mode</b>	<b>Standard</b> should be selected unless you are using Citrix or Remote Desktop Services. If you are using Citrix or Remote Desktop Services, see the Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide for more information.
<b>Low Level Detection Mode</b>	If Application Enabler is not able to detect an application, this option may help to detect the application.  <b>Note:</b> Low Level Detection Mode is not supported when enabling 64-bit applications.

Option	Description
<b>Enhanced HTML Processing Mode</b>	<p>Used to configure some HTML applications that use both ID and NAME for HTML fields. The option determines how Application Enabler should identify these fields in the following ways:</p> <ul style="list-style-type: none"> <li>• If the <b>Enhanced HTML Processing</b> option is selected, the ID will be used over the NAME if both are present.</li> <li>• If the <b>Enhanced HTML Processing</b> option is not selected, the NAME will be used over the ID if both are present.</li> <li>• If the <b>Enhanced HTML Processing</b> option is selected and Application Enabler cannot find the ID it will look for the NAME.</li> <li>• If the <b>Enhanced HTML Processing</b> option is not selected and the ID is found but the NAME is not, the ID will be used.</li> </ul>
<b>Silent Mode</b>	Allows you to suppress the display of message prompts for HTML-based applications and other applications.
<b>PreProcess Scripts Location</b>	<p>Allows you to specify the location of preprocess scripts. This setting is saved to the configuration file. Click <b>Browse</b> to browse to the appropriate directory.</p> <hr/> <p><b>Note:</b> URL formats are not supported.</p> <hr/>

## Accessing Previous Configurations

If you have enabled several applications in the same session, you can access them after configuration by selecting the configuration from the **Enabled Applications** list. You can access the properties of the configuration by selecting the configuration from the **Enabled Applications** list, and clicking **Configure**.

You can reconfigure previously configured screens by selecting the appropriate screen in the **Enabled Screens** list and clicking **Configure**. If any changes are made, hotspots should be reconfigured.

If you select a screen in the **Enabled Screens** list, you can configure optional hotspots by clicking **Advanced**.

To delete a configuration for an entire application, select the application and click **Delete** below the **Enabled Applications** selection list.

To delete a screen within an application, select it and click the **Delete** button to the right of the **Enabled Screens** selection list.

To rename a screen within an application, double-click it and type a new name or edit the existing name.

## Enabling 64-Bit Applications

Application Enabler supports enabling 32-bit and 64-bit applications. Both 32-bit and 64-bit versions of the same application can be enabled simultaneously, but they must be considered separate applications and must be configured separately.

For example, you can enable a 32-bit version of Internet Explorer and a 64-bit version of Internet Explorer. When enabling a 64-bit version of Internet Explorer, it is indicated in the **Enabled Applications** selection list by the suffix **\*64**. 32-bit applications maintain the **.exe** suffix. As each application is listed separately, each application must also be configured separately.

The following is a list of limitations which should be considered when enabling 64-bit applications:

- **Low Level Detection Mode**

Low Level Detection Mode is not supported for 64-bit applications. When a configuration file contains both 32-bit and 64-bit applications, Low Level Detection Mode can still be used to detect 32-bit applications.

## Enabling Connections

Connections created in the Connector configuration are used to create custom integrations that will enable you to use Application Enabler functions in your line-of-business applications quickly and easily. For more information on configuring connections, see [Connector Configuration on page 339](#).

## Enabling Smart-Screen Applications

### Configuration Overview for Smart-Screen Applications

The Smart-Screen configuration process creates links between Silverlight or Windows Presentation Foundation (WPF)-based line-of-business application data fields and OnBase Keyword Types. A Smart-Screen configuration is also recommended for Internet Explorer and Windows-based line-of-business applications.

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**Note:** When enabling Google Chrome using Smart-Screen, the application will not function as expected unless Global Accessibility Mode is enabled in Google Chrome. For more information, see <https://sites.google.com/a/chromium.org/dev/developers/design-documents/accessibility>.

---

After opening Application Enabler Configuration, create links by doing the following:

1. Open the line-of-business application to enable. See [Open the Line-of-Business Application on page 48](#).
2. Create links between line-of-business application fields and Document Types and Keyword Types. See [Create Links Between Line-of-Business Application Screens/Fields and System Keywords on page 48](#).
  - Create a new Smart-Screen configuration in Application Enabler Configuration.
  - Identify the screen to enable.
  - If no **Name** is displayed on the **General** section, click **View Window Info Tree** and find the 'parent' of the control you are going to use. See [View Window Info Tree on page 54](#) for more information.
3. Log on to OnBase. You have access to only those documents for which you have been granted rights. See [Logging on to OnBase on page 55](#).
  - Select the Document Types of the documents to be retrieved when on the line-of-business application screen. See [Select Document Types on page 56](#).
4. Establish a link between the OnBase Keyword Types, Unity Form fields, or WorkView attributes to a location on the line-of-business application screen. See [Associating Keyword Types, Unity Form Fields, or WorkView Attributes on page 57](#).
  - Click **Settings** to access formatting options. Select the appropriate stripping options to eliminate unwanted characters or spaces. Appropriate formatting options are available for date or currency. See [Settings on page 63](#).

---

**Note:** The formatting options on the **Strip**, **Parse**, and **Append** tabs can work in conjunction with one another. Formatting options are applied sequentially, such that options on the **Strip** tab are applied first, followed by options on the **Parse** tab, and then by options on the **Append** tab. Options on these tabs are also applied sequentially, from the top of the tab to the bottom of the tab.

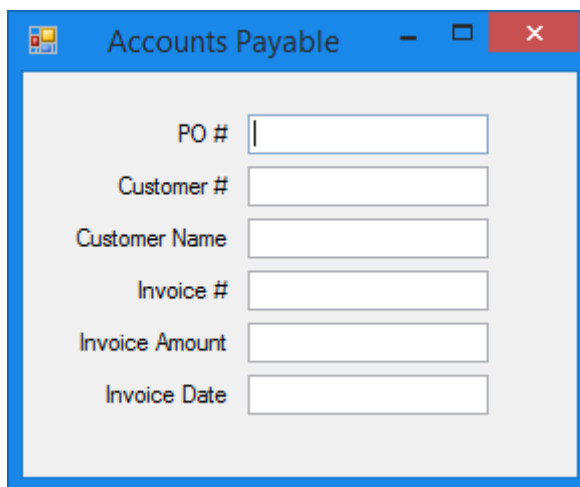
---

5. Configure properties. See [Properties Dialog Box on page 76](#).
  - Choose the mouse and/or keyboard event that triggers retrieval.
  - Specify how screens are identified (Window ID or Caption)
6. Save your configuration. See [Save and Close on page 86](#).
7. Optionally, configure hotspots. See [Configuring Hotspots on page 277](#).

## Step by Step Configuration

### Open the Line-of-Business Application

Open the line-of-business application you want to enable. An example application is shown below.



### Create Links Between Line-of-Business Application Screens/Fields and System Keywords

In order to create links with the line-of-business application:

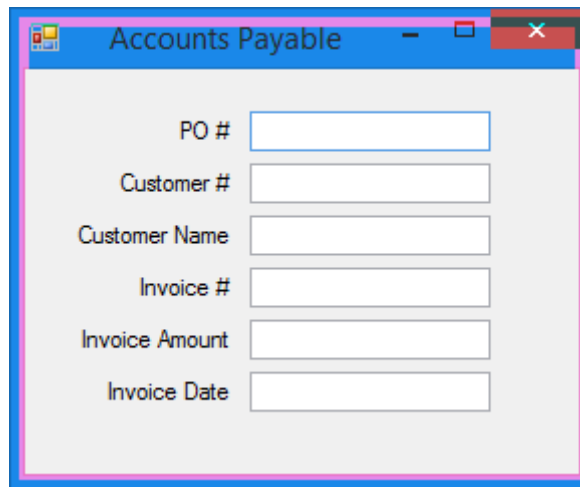
1. Identify each line-of-business application screen to enable. A line-of-business application screen is a single window of information. Line-of-business applications can have many screens. You can enable one or many screens.
2. Identify, or map, each form field and its related OnBase Keyword Type. Line-of-business application screens can be composed of configurable form fields, non-configurable text, and other components.
3. Select keywords used for retrieval.
4. Identify optional hotspots. Hotspots allow you to retrieve OnBase documents based on values in a single line-of-business application field. If hotspots are not configured, documents are retrieved based on the value of all fields configured for the screen.

### Create a New Smart-Screen Configuration

Open your line-of-business application and ensure that the screen you wish to enable is visible and can be selected with a single mouse click.

To begin enabling an application:

1. In Application Enabler Configuration, click **New Smart-Screen**.
2. As you move the mouse across the line-of-business application, areas of your screen are highlighted by a **selection box**, which encloses the area selected for capture. Place your mouse over the line-of-business application you wish to enable. Move your mouse until the selection box encloses the entire line-of-business application screen and left-click to select it. It is possible (but not necessarily desirable) to select individual line-of-business application form fields (i.e., text boxes), in which case the selection box encloses the form field.





3. Application Enabler Configuration extracts the name of the line-of-business application screen and displays the **Settings** dialog box:

The screenshot shows the 'Settings' dialog box. The 'General' section has 'Name' and 'Caption' fields, both containing 'Accounts Payable'. A 'View Window Info Tree' button is located below these fields. The 'Page Identification Elements' section features a table with columns 'Type', 'Id', and 'Value'. To the right of the table are 'New', 'Edit', and 'Remove' buttons. At the bottom of the dialog are '< Back', 'Next >', 'Cancel', and 'Help' buttons.

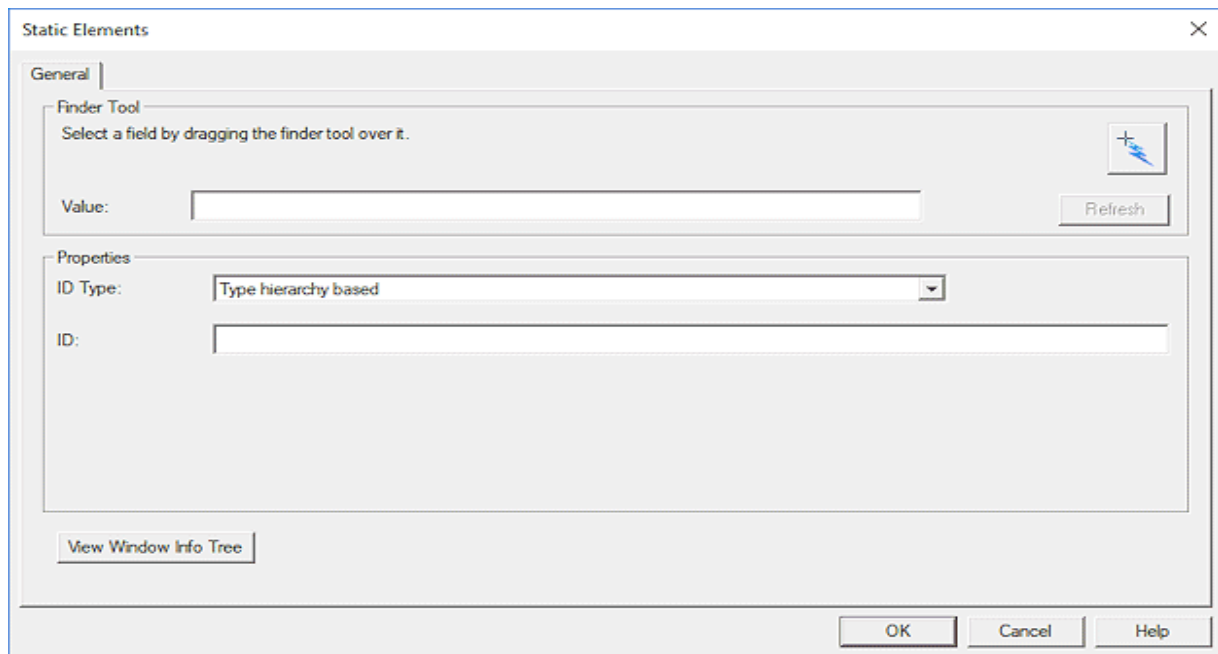
In some cases, the line-of-business application name may not appear as you wish. Rename the screen by replacing the default name provided in the **Name** field. If no **Name** is displayed on the **General** section, click **View Window Info Tree** and find the 'parent' of the control you are going to use. For more information on the **Info Tree** dialog box, see [View Window Info Tree on page 54](#).

---

**Caution:** If you change the text in the **Caption** field and you are using the caption to identify the screen, the screen may not be identified correctly for your configuration. If this occurs, you must reconfigure the enabled application to reflect the changed caption text.

---

4. If the name/path is dynamic, you can enter **Page Identification Elements** for the page. These strings should be elements on the screen that do not change. To create **Page Identification Elements**:
  - a. Click **New**. The **Static Elements** dialog box displays.



The **Static Elements** dialog box is shown with the **General** tab selected. It contains the following fields and controls:

- Finder Tool**: A section with the instruction "Select a field by dragging the finder tool over it." and a button with a crosshair icon.
- Value**: A text input field.
- Refresh**: A button next to the Value field.
- Properties**: A section containing:
  - ID Type**: A dropdown menu currently set to "Type hierarchy based".
  - ID**: A large text input field.
- View Window Info Tree**: A button at the bottom left of the dialog.
- OK**, **Cancel**, and **Help**: Buttons at the bottom right of the dialog.

- b. From the **ID Type**: drop-down list, select the how the identifier for the enabled element will be calculated:
- **Type hierarchy based** - Pages are identified based on hierarchy.
  - **AutomationId and occurrence based** - Pages are identified based on occurrence and automation ID.

**Tip:** Use **AutomationId and occurrence based** if a page contains multiple elements with the same name.

- **Tag Based** - Pages are identified based on tags that do not change location and a relative path to the target field. If Tag Based is selected, the window changes to include the following:

Static Elements

General

Finder Tool

Select a tag by dragging the finder tool over it.

Tag Value:

Properties

ID Type:

ID:

Occurrence:  Path from Tag:

[View Window Info Tree](#)

Note: The window info tree can only pick tag properties.

OK Cancel Help

Application Enabler uses these identifiers to locate elements in the line-of-business application and scrape values from these elements. The tag value is a static field on the application.

**Note:** The tag based method is the slowest of the available ID Type methods and should only be used when other methods are not viable.

**Note:** When using a tag based ID method, Chrome is the preferred browser.

- c. Depending on the ID Type selected, perform one of the following:
- For the **Type hierarchy based** and **AutomationID and occurrence based** ID Types, click and hold on the **Finder Tool** button. Drag the cursor from the button to the element in the application you want to identify. The **Value:** and **ID:** fields will populate if information is available.
  - For the **Tag Based** ID Type, click and hold the **Finder Tool** button. Drag the cursor from the button to the label for the element in the application you want to identify. The **Tag Value:** and **ID:** fields will populate if information is available.

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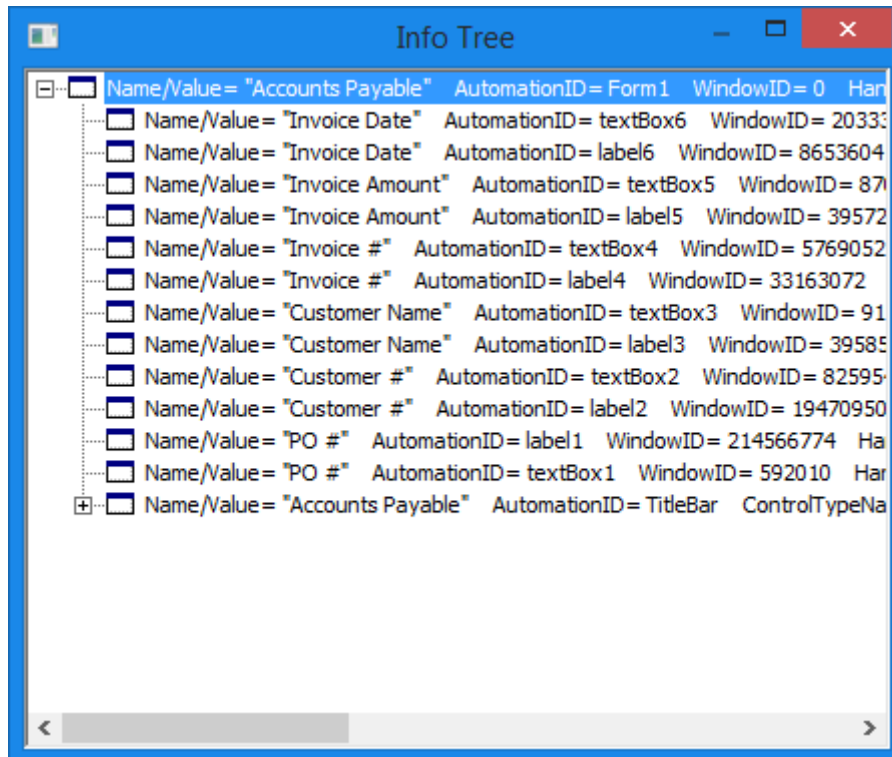
**Tip:** You can manually enter values, but the Finder Tool can more easily and quickly provide accurate results.

---

- d. If you chose **AutomationId and occurrence based**, specify which occurrence should be used in the **Occurrence** field. For example, a page contains two elements with the same name. To use the first occurrence, specify **1** in the **Occurrence** field. To use the second occurrence, specify **2** in **Occurrence** field.
- e. To verify your configuration, you can click the **Refresh** button to highlight the element in the line-of-business application. You can also use the **View Window Info Tree** to open the **Info Tree** dialog box. For more information, see [View Window Info Tree on page 54](#).
- f. When you have finished configuring the page identification element, click **OK**.
- g. The page identification element will display in the **Settings** dialog box.
- h. Repeat the above steps for each element you need to configure.
- i. When done configuring page identification elements, click **Next**.

## View Window Info Tree

Clicking **View Window Info Tree** in the **Settings** dialog box opens the **Info Tree** dialog box:



This dialog box contains the following information for the application and the application's fields:

- Caption/Value
- Window ID
- Window Handle
- Class Name

This information can be helpful during configuration. This dialog box allows you to identify the parent window, a sub window, or field. To identify any parent, window, or field, right-click on any item and select **Highlight**.

In addition, you can right-click on the window and select **Search** to search. For Smart-Screen, Windows-based, text-based, HTML-based, and Dynamics GP-based applications, the Caption/Value item will be searched. For Java-based applications, Value, AccessName, and AccessDescription will be searched.

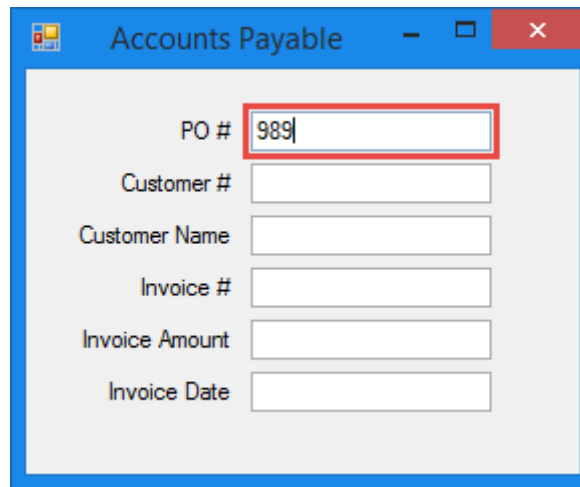
You can also right-click on the window and select **Save As** to save the data in the **Info Tree** dialog box to a text file.

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**Note:** When configuring a Silverlight application and multiple windows in the tree hierarchy have the same Caption/Value, either level can be used for scraping, however, it is recommended to use the lowest level of the Caption/Value.

---

A box flashes four times around the window or field, represented by the selected item, in the enabled application.



You can select the window or field you wish to enable from the **Info Tree** dialog box by right-clicking on the item you wish to enable and selecting **Use Selected Window**. The window or field you selected will be the enabled control that is used to gather user input in the enabled application.

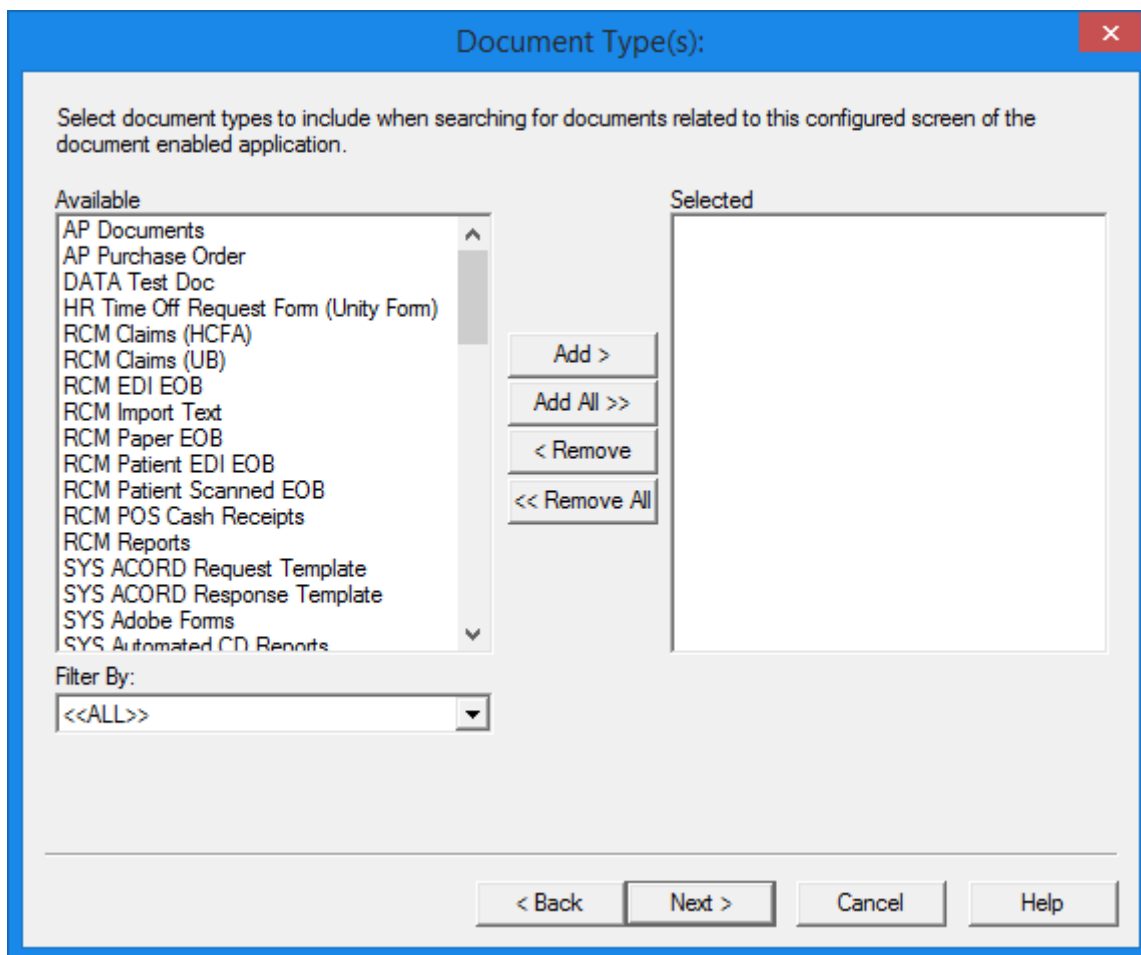
## Logging on to OnBase

If you are not currently connected to OnBase, a window opens and prompts you to log on.

1. Select the appropriate data source from the drop-down list. This drop-down list is only displayed when multiple data sources are available.
2. Type your OnBase user name.
3. Type your OnBase password.
4. Click **Login** to log on, or click **Cancel** to close the dialog without logging on.

## Select Document Types

The **Document Type(s)** dialog box is displayed:



1. Select the Document Types to search when retrieving OnBase documents through the line-of-business application. If you want to display all documents related to a screen, select all the Document Types that a user could possibly need from this screen. If you want to display only documents most relevant to a screen, select only the Document Types that most closely relate to the screen. Cross-referencing can be used to find other less closely related documents. Hold down the **Ctrl** key while selecting Document Types to select multiple Document Types that are not consecutively listed. Hold down the **Shift** key while selecting Document Types to select multiple Document Types that are consecutively listed.

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**Note:** A Document Type is not required if you are configuring Healthcare Module Keyword Types or WorkView attributes.

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2. Select one or multiple (using the Ctrl or Shift keys) Document Types from the **Available** list and click **Add** to add them to the **Selected** list. To add all Document Types, click **Add All**.  
To remove one or multiple (using the Ctrl or Shift keys) Document Types from the **Selected** list, select the Document Type(s) and click **Remove**. To remove all Document Types, click **Remove All**.
3. To filter available Document Types by Document Type Group, select a Document Type Group from the **Filter By** drop-down list.
4. Click **Next** to continue.

## Associating Keyword Types, Unity Form Fields, or WorkView Attributes

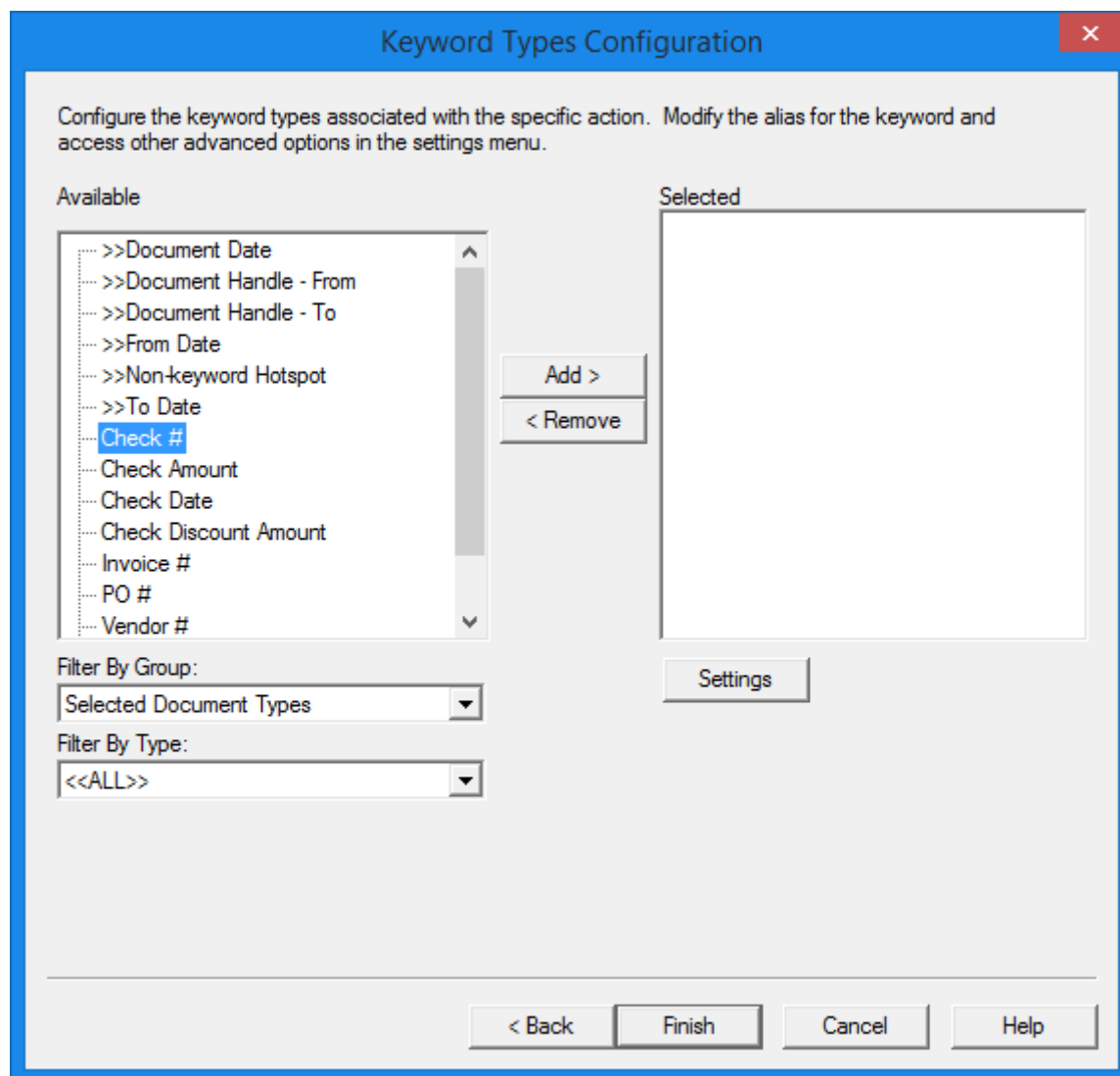
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**Caution:** Specific Currency Keyword Types are not currently supported for use with Application Enabler.

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After selecting Document Types, the **Keyword Types Configuration** dialog box is displayed.



This screen allows you to associate Keyword Types, Unity Form fields, or WorkView attributes with the configured screen.

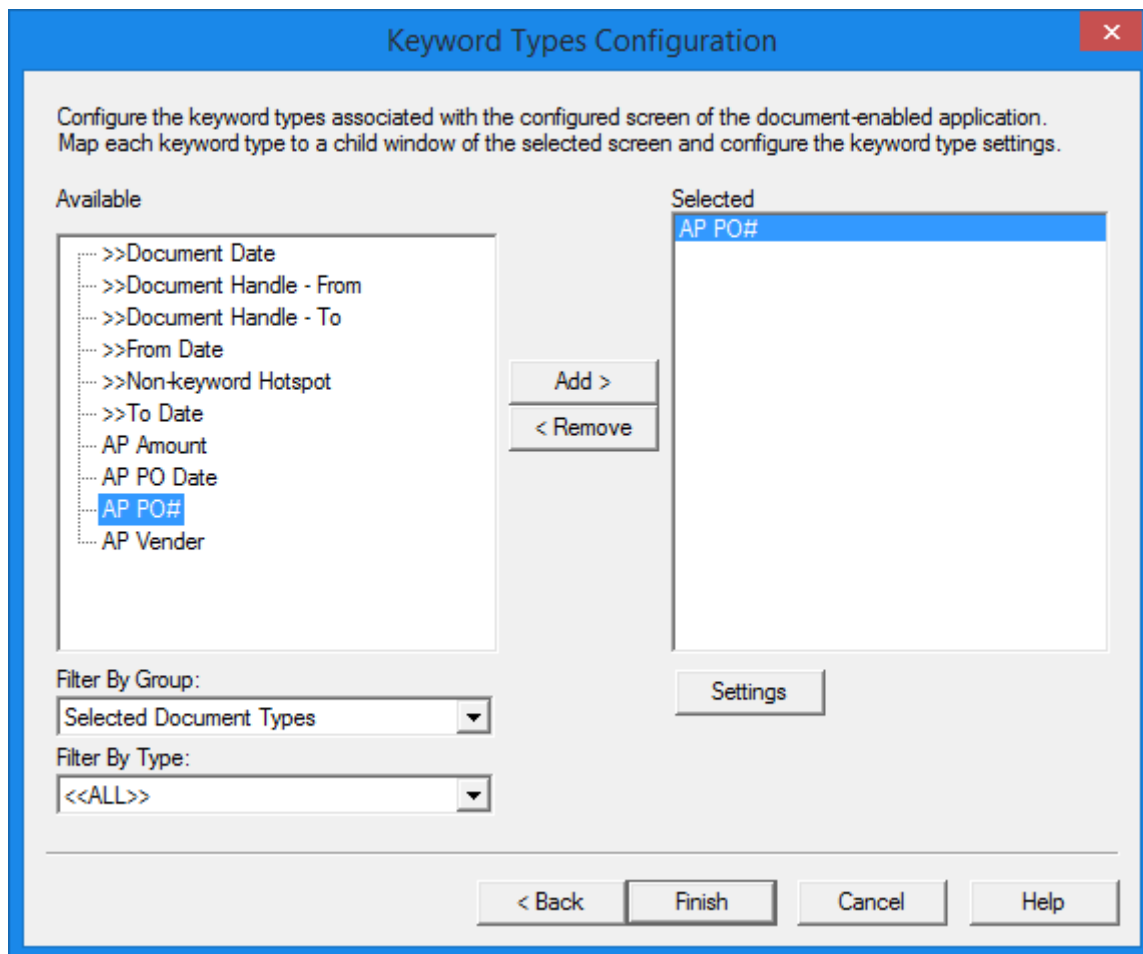
You can filter the **Available** list using the **Filter By Group** and **Filter By Type** drop-down lists. These two drop-down lists work together to narrow down the items that are displayed for easy selection and configuration. The **Filter By Group** drop-down list includes the following:

Filter By Group	Description
<b>Combined View Types</b>	When selected, the <b>Available</b> list displays any Combined View Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen. The <b>Filter By Type</b> drop-down list contains the available Combined View Types.

Filter By Group	Description
<b>Government Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase government module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the <b>Plan Review</b> selection, which is for the Electronic Plan Review module.</p>
<b>Healthcare Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase healthcare module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the following OnBase healthcare modules:</p> <ul style="list-style-type: none"> <li>• DeficiencyPop</li> <li>• RAC Audit</li> <li>• Patient Window</li> </ul> <hr/> <p><b>Note:</b> The ChartPop, DeficiencyPop, and LongitudinalPop options are maintained for legacy purposes only. For new medical deployments, please use the OnBase Patient Window.</p> <hr/>
<b>Selected Document Types</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen.</p> <p>The <b>Filter By Type</b> drop-down list contains the Document Types that were selected on the <b>Document Type(s):</b> screen.</p>
<b>Unity Form Templates</b>	<p>When selected, the <b>Available</b> list displays any Unity Form fields associated with the Unity Form template selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of Unity Form templates.</p>
<b>Workview App</b>	<p>When selected, the <b>Available</b> list displays any WorkView attributes associated with the WorkView class that is selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of WorkView classes.</p> <hr/> <p><b>Note:</b> The following WorkView attribute Data Types are not supported for use with Application Enabler, and are not displayed during configuration: Text, Formatted Text, Document, Date/Time. External classes are not supported for use with Application Enabler. Multiple level relationships (for example, AssignedEmployee.Manager.FullName) are also not supported.</p> <hr/>

1. If you are configuring a Keyword Type, select the Keyword Type in the **Available** list and click **Add**.

Keyword Types that are mapped to system properties are available for configuration. See >>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date on page 61 for more information.



If you are configuring a Unity Form, select Unity Form fields in the **Available** list and click **Add**.

If you are configuring a WorkView attribute, select the attribute in the **Available** list and click **Add**. Nested attributes are displayed with a + symbol.

2. The Application Enabler Configuration selection box is enabled. Move your mouse until the selection box encloses the line-of-business application field you wish to associate.
3. To configure additional options, select an item in the **Selected** list and click **Settings**. See [Settings on page 104](#) for information on these options.

---

**Note:** Multiple fields can be mapped to a single Keyword Type. To map another field to a Keyword Type, complete steps 1-3. When a new field is mapped to a keyword that already is mapped to a field, the keyword name is followed by an incremental number in parenthesis, used to distinguish between the different mapped fields. Example: The second mapping of the Vendor Name Keyword Type to a field results in a Keyword Type name of Vendor Name (01). The third mapping results in a Keyword Type name of Vendor Name (02).

---



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**Note:** WorkView attributes, Unity Form fields, and module-specific Keyword Types can only be mapped to a field once.

---

4. Click **Next** to continue.

**>>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date**

The **>>Document Date**, **>>Document Handle - From**, **>>Document Handle - To**, **>>From Date**, **>>Non-keyword Hotspot**, and **>>To Date** Keyword Type selections have distinct purposes.

Keyword Type	Description
<b>&gt;&gt;Document Date</b>	<p>Allows you to map to the Document Date of a document during indexing.</p> <hr/> <p><b>Note:</b> The <b>&gt;&gt;Document Date</b> Keyword Type is not respected by all Application Enabler contexts. For more information, see <a href="#">Using Contexts on page 288</a>.</p> <hr/>

Keyword Type	Description
>>Document Handle - From	<p>Allows you to map to the <b>From</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b>, and <b>Application Enabler - Retrieve in Workflow</b> contexts, or generate document packets with the <b>Application Enabler - Generate Document Packets</b> context.</p> <p>To retrieve using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Retrieve Documents</b> and <b>Application Enabler - Retrieve in Workflow</b> will only retrieve the single Document Handle that matches the scraped value.</p> <p>To generate a document packet using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Generate Document Packets</b> will only generate the packet for that single Document Handle that matches the scraped value.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - From Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/> <p><b>Note:</b> When using the &gt;&gt;Document Handle - From Keyword Type with the <b>Application Enabler - Retrieve in Workflow</b> context, all other keywords that are passed in will be ignored.</p> <hr/> <p><b>Note:</b> In order for document retrieval to function as expected when using the <b>Document Handle</b> system keyword, the <b>Retrieve by Document Handle / File Name</b> product right must be assigned to the user's user group in the OnBase Configuration module.</p> <hr/>
>>Document Handle - To	<p>Allows you to map to the <b>To</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b> context.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - To Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/>
>>From Date	<p>Allows you to map to the <b>From</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

Keyword Type	Description
>>Non-keyword Hotspot	Allows you to map a hotspot to any screen element without mapping the element to a Keyword Type. This will allow a screen scrape to be initiated from any element on the screen. For example, using this selection, the hotspot could be mapped to a button on the screen that is not associated with a Keyword Value.
>>To Date	<p>Allows you to map to the <b>To</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

## Settings

The **Settings** dialog box is opened by clicking the **Settings** button on the **Keyword Types Configuration** screen. Available settings are described in the following sections:

- [The General Tab on page 64](#)
- [Setting a Keyword as Required on page 65](#)
- [Table on page 66](#)
- [Character Stripping on page 68](#)
- [Parsing on page 70](#)
- [Appending Prefixes and/or Suffixes to Scraped Keyword Values on page 72](#)
- [Currency Keyword Formatting on page 73](#)
- [Date Keyword Formatting on page 74](#)

## The General Tab

The **General** tab is the starting tab in the **Settings** dialog box. This tab is used to configure keyword identification types and locations of keywords within the application.

The screenshot shows the 'Settings:PO #' dialog box with the 'General' tab selected. The dialog has four tabs: 'General', 'Strip', 'Parse', and 'Append'. The 'Finder Tool' section contains a text box for 'Value' and a 'Refresh' button. The 'Properties' section includes an 'ID Type' dropdown menu set to 'Type hierarchy based', an 'ID' text box, a 'Required keyword' checkbox, and a 'Warning Level' dropdown menu set to 'Warn and continue'. A 'View Window Info Tree' button is located at the bottom left of the dialog. At the bottom right are 'OK', 'Cancel', and 'Help' buttons.

To configure a keyword on the **General** tab:

1. From the **ID Type** drop-down list, select the how the identifier for the keyword will be calculated. Application Enabler uses these identifiers to locate elements in the line-of-business application and scrape keyword values from these elements.:
  - **Type hierarchy based** - Keywords are identified based on hierarchy.
  - **AutomationId and occurrence based** - Keywords are identified based on occurrence and automation ID.

---

**Tip:** Use **AutomationId and occurrence based** if a page contains multiple elements with the same name.

---

**Tag Based** - Keywords are identified based on labels that do not change location and a relative path to the target field. If Tag Based is selected, the **Occurrence** and **Path from Tag** fields are displayed. Application Enabler uses these identifiers to locate elements in the line-of-business application and scrape values from these elements. The tag value is a static field on the application. The field value is a dynamic value on the application that is scraped as the OnBase keyword value.

---

**Note:** The tag based method is the slowest of the available ID Type methods and should only be used when other methods are not viable.

---

---

**Note:** When using a tag based ID method, Chrome is the preferred browser.

---

2. Depending on the ID Type selected, perform one of the following:
  - For the **Type hierarchy based** and **AutomationID and occurrence based** ID Types, click and hold the **Finder Tool** button. Drag the cursor from the button to the element in the application you want to identify. The **Value** and **ID** fields will populate if information is available.
  - For the **Tag Based** ID Type, first click and hold the **Finder Tool** button near the **Tag Value** field first. Drag the cursor from the button to the label for the element in the application you want to identify. The **Tag Value:** and **ID:** fields will populate if information is available. Then click and hold the **Finder Tool** button near the **Field Value** field. Drag the cursor from the button to the label for the element in the application you want to identify. The **Field Value** field will populate with either the value in the field already or the label for the field.

---

**Tip:** You can manually enter values, but the Finder Tool can provide more accurate results quickly and easily.

---

3. If you chose **AutomationId and occurrence based**, specify which occurrence should be used in the **Occurrence** field. For example, a page contains two elements with the same name. To use the first occurrence, specify **1** in the **Occurrence** field. To use the second occurrence, specify **2** in **Occurrence** field.

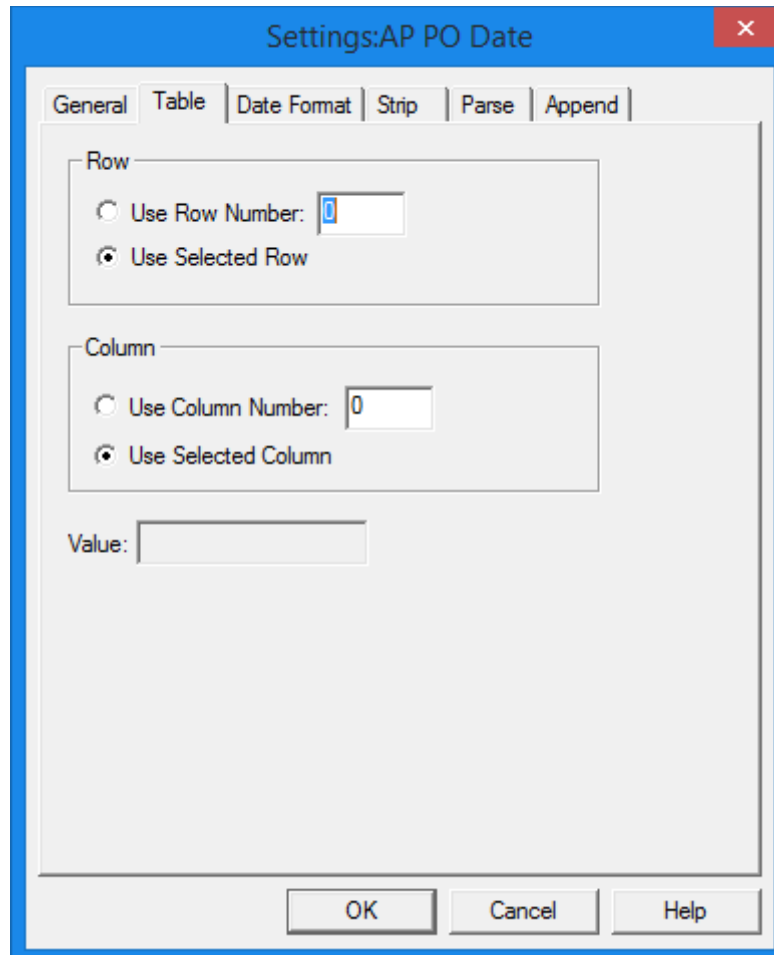
### Setting a Keyword as Required

The **General** tab allows you to set a Keyword Type as a required keyword. To make a keyword required, select **Required keyword**. You can select either **Warn and continue** or **Warn and cancel** from the **Warning Level** drop-down list to determine if you want users to be able to continue a query that does not specify a value for a required keyword. You can also click **View Window Info Tree** to access the **Info Tree** dialog box. This dialog box can be used to identify fields to map to Keyword Types.



## Table

In some Windows applications, lists of information need to be enabled. When this is necessary, the **Table** tab is used to specify the appropriate row and column information. You can configure Application Enabler to scrape a static row/column or to use the value that exists in the row and column that is selected dynamically in Application Enabler.



The following settings are available on the **Table** tab:

Setting	Description
<b>Use Row Number</b>	Uses the row specified to obtain a value when the enabled list is selected in Application Enabler. This option creates a static row that cannot be changed.
<b>Use Selected Row</b>	Uses the row selected within the enabled list in Application Enabler to obtain a value. This option creates dynamic row selection.

<b>Use Column Number</b>	Uses the column specified to obtain a value when the enabled list is selected in Application Enabler. This option creates a static column that cannot be changed.
<b>Use Selected Column</b>	Uses the column selected within

## Character Stripping

If you wish to retrieve documents based on a subset of characters within a value, you can configure Application Enabler to "strip" characters to exclude from the search using the **Strip** tab. For example, if a line-of-business application field contains a full phone number and you wish to retrieve OnBase documents based on area code, configure character stripping to remove all characters but the area code from the line-of-business application field.

Settings:AP PO#

General Strip Parse Append

Each strip option allows you to remove selected characters for the scraped value.  
Each option is applied in a top to bottom sequence.

☐ Strip spaces

☐ Strip any occurrences of string

String:

☐ Strip from beginning

Number of characters:

☐ Strip from end

Number of characters:

OK Cancel Help

The sequence of operation is from the top down. Application Enabler first strips spaces (if checked) then strips characters (if checked) and so on.

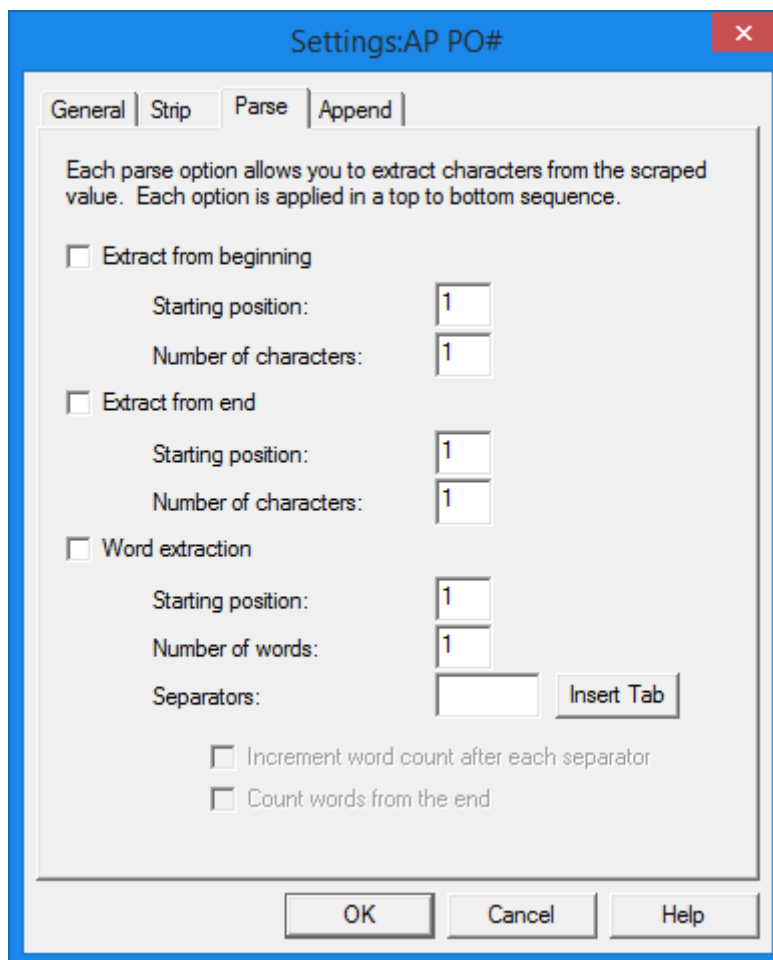
The following settings are available on the **Strip** tab:

Setting	Description
<b>Strip spaces</b>	Select <b>Strip spaces</b> to remove all spaces from the line-of-business application value, regardless of the location of the spaces. For example, if <b>Strip spaces</b> is selected, double-clicking on a properly configured line-of-business application field containing <b>2_2__16_44__</b> (where _ represents a space) will return OnBase documents with the Keyword Value <b>221644</b> .
<b>Strip any occurrences of string</b>	Select <b>Strip any occurrences of string</b> to strip all occurrences of a specific character from the line-of-business application value, regardless of the location of the character within the value. Enter the character you wish to strip in the <b>String</b> field. This option could be used to strip all dashes from a Social Security Number or an account number.  <b>Note:</b> Values are case sensitive.
<b>Strip from beginning</b>	Select <b>Strip from beginning</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the beginning of a value. For example, <b>Strip 5 Characters from Beginning</b> could be used to strip 3-digit area code enclosed in parentheses (###) from a telephone number.
<b>Strip from end</b>	Select <b>Strip from end</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the end of a value.

When your selection is complete, click **OK** to return to the **Keyword Types Configuration** screen. Define character-stripping options for each keyword that requires character stripping. Click **Next** to continue configuring Application Enabler.

## Parsing

The **Parse** tab allows you to extract characters and words from scraped values within the enabled application:



When parsing, Application Enabler attempts to find characters at the configured **Starting position**. Spaces are excluded from the configured **Number of characters**. For example, the **Starting position** is 1 and the **Number of characters** is 10. Application Enabler starts at 1, but encounters 8 spaces before a numeric character. In this example, Application Enabler excludes the 8 spaces from the **Number of characters** count, and the numeric character becomes the first of the 10 characters that Application Enabler will extract for the Keyword Value.

To extract characters starting at the beginning of a line:

1. Select the **Extract from beginning** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the Keyword Value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract characters starting at the end of a line:

1. Select the **Extract from end** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the keyword value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract words:

1. Select the **Word extraction** check box.
2. Enter the word number where the words that are to be extracted start in the **Starting position** field.
3. Enter the number of words you want to extract from the keyword value in the **Number of words** field.
4. Enter the character that separates the words in the **Separators** field. If you want to use a tab as a separator, click the **Insert Tab** button. A tab will be placed in the field.

---

**Note:** The default separator character is a space. Multiple characters can be entered into the field. Only one character can be used at one time and the character used must come from the list of characters entered into the **Separators** field. You must delete the space character from the field if you do not want to use spaces as separators.

---

5. If you want to account for blank values that may exist between separators, select the **Increment word count after each separator** option. This option will ensure that the number of values corresponds with the number of separators.
6. If you want to begin counting words from the end of the line, select the **Count words from the end** option.

---

**Note:** If **Count words from the end** is selected, Application Enabler will count back the specified number of words, and then extract the set number of words forward from that point.

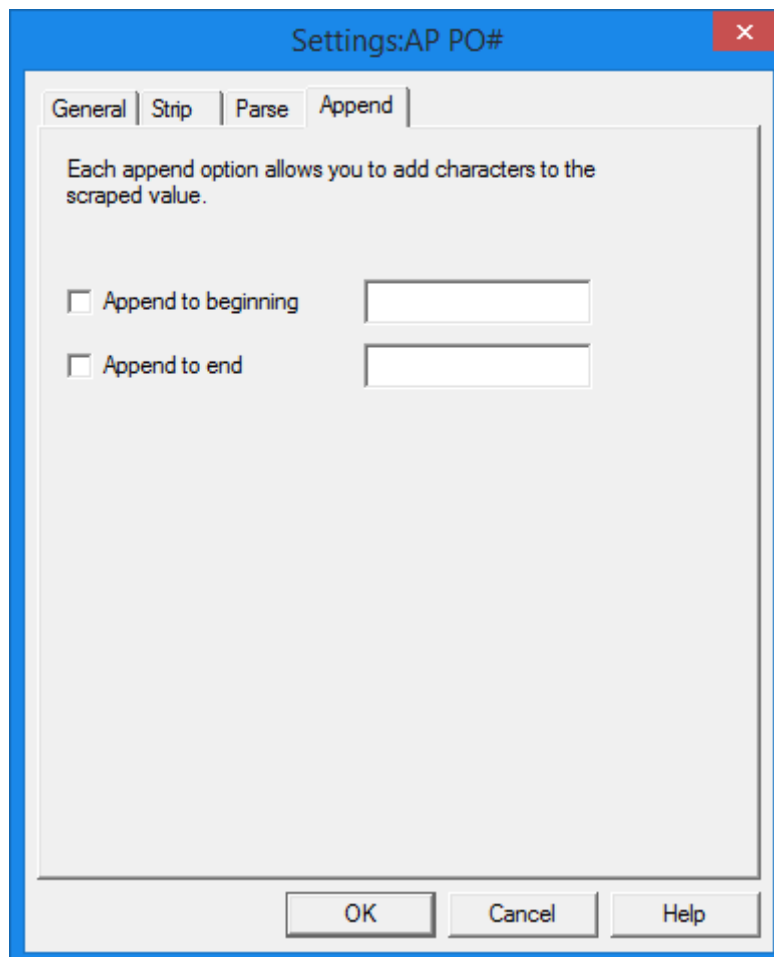
---

7. Click **OK** to return to the **Keyword Type Configuration** screen.

Advanced parsing is discussed in [Advanced Parsing on page 1](#).

## Appending Prefixes and/or Suffixes to Scraped Keyword Values

The **Append** tab allows you to configure a specific prefix and/or suffix to be affixed to scraped Keyword Values for the selected Keyword Type.



Settings:AP PO#

General | Strip | Parse | **Append**

Each append option allows you to add characters to the scraped value.

☐ Append to beginning

☐ Append to end

OK Cancel Help

To append a prefix or suffix:

1. Select the **Append to beginning** or **Append to end** check box(es).
2. Enter the value(s) in the field to the right of the selected check box(es).

---

**Note:** Values are case sensitive.

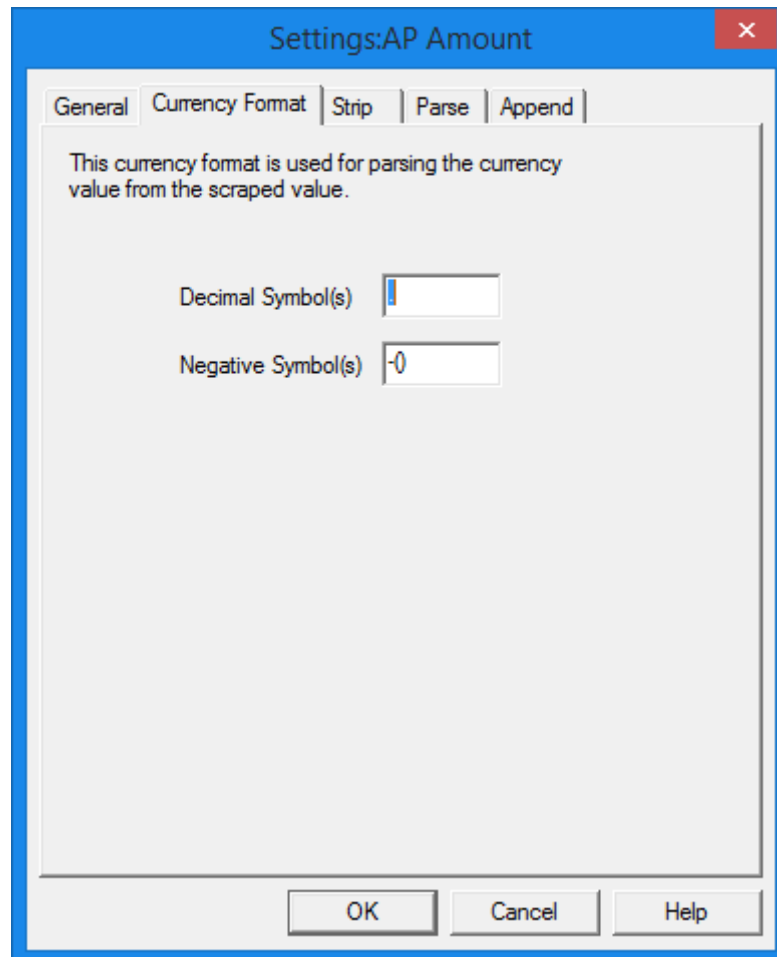
---

3. Click **OK** to return to the **Keyword Type Configuration** screen.

# Currency and Date Keyword Formatting

## Currency Keyword Formatting

For currency Keyword Types, the **Currency Format** tab is available:



In this tab, you can specify the symbol(s) to be used to separate the decimal places from the other places in values (**Decimal Symbol(s)**). You can also specify the symbol(s) to use for negative currency values (**Negative Symbol(s)**).



## Date Keyword Formatting

For date Keyword Types, the **Date Format** tab is available:

**Settings:AP PO Date**

General | Table | **Date Format** | Strip | Parse | Append

This date format is used for parsing all date fields out of the scraped value.

The format follows the rules for the Windows® regional date settings

Date Format: **M/d/yyyy**

Date Sample: 12/21/2015

☐ Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)

OK Cancel Help

From the **Date Format** drop-down list, select the format of the date in the line-of-business application.

The following date formats are available:

Format	Example
<b>M/d/yyyy</b>	6/4/2010
<b>MM/d/yy</b>	06/4/10
<b>MM/dd/yy</b>	06/04/10
<b>MM/dd/yyyy</b>	06/04/2010
<b>yy/MM/dd</b>	10/06/04

Format	Example
yyyy-MM-dd	2010-06-04
dd-MMM-yy	04-Jun-10
MMddyy	060410
ddMMyy	040610

When a date value is scraped from the line-of-business application, the value will be converted to reflect the regional settings specified for the workstation.

If you will be scraping Umm al-Qura date values, select the **yy/mm/dd** date format and the **Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)** check box.

---

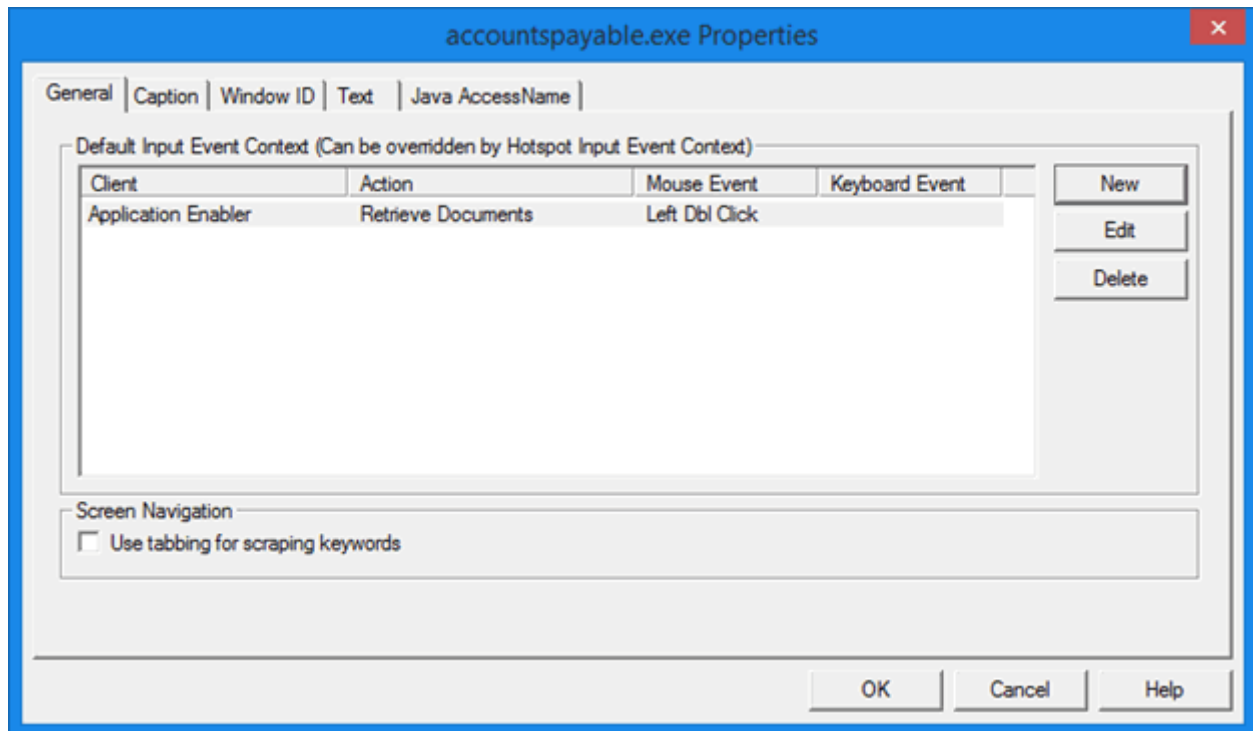
**Note:** You can only use Application Enabler contexts when scraping Umm al-Qura date values.

---

## Properties Dialog Box

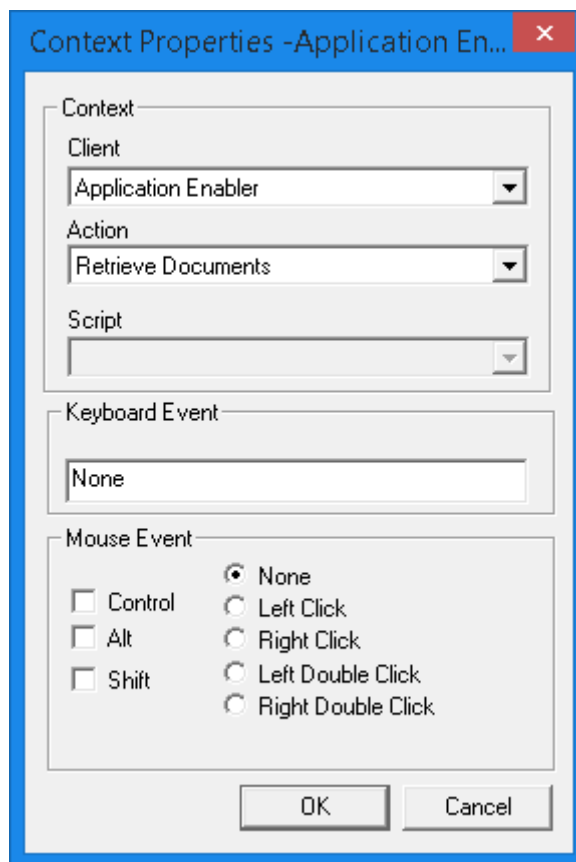
### Mouse and Keyboard Events and Contexts

The **General** tab is used to define the mouse or keyboard events used to trigger document retrieval.



**Note:** When **Desktop - Run Script** is configured as a context, the **Action** column will display the name of the VBScript.

1. To add a new mouse or keyboard event, click **New**.
2. The **Context Properties** dialog box is displayed:



3. Select the OnBase client that will be used to execute the context from the **Client** drop-down list, and the action to be executed from the **Action** drop-down list. For more information on available clients and actions, see [Using Contexts on page 288](#).
4. Depending on the action and context you have configured, you can select either a VBScript or a Unity Script to associate with the keyboard or mouse event from the **Script** drop-down list. The VBScripts and Unity Scripts that are available are those that have been configured for the database that is currently connected.
5. To define a keyboard event used to trigger a search, place your cursor in the **Keyboard Event** field and type the desired keystroke or keystroke combination. For example, press **Ctrl** and **F5** simultaneously to define **Ctrl+F5** as a keystroke combination.
6. To define a mouse event used to trigger a search, select the mouse event from the **Mouse Event** options (**Left Click**, **Right Click**, etc.). You can create a combination keystroke and click event by selecting the **Control**, **Alt**, or **Shift** options in addition to a click event.

When defining mouse events:

- It is recommended to use a keyboard key in addition to the **Left Click** and **Right Click** options. It is also recommended to not use similar mouse and keyboard events in the same application. For example, Shift+Left Click and Shift+Left Double Click.
- The **Left Double Click** and **Right Double Click** options are not supported when enabling a Java-based application.

- The **Left Double Click** and **Right Double Click** options are registered as two single mouse clicks when enabling certain Smart-Screen applications (i.e., WPF and Silverlight applications). To enable these applications, use the **Left Click** or **Right Click** options.
7. Click **OK**.
  8. If you want to use the **Tab** keyboard key to scrape values from the enabled screen, select the **Use tabbing for scraping keywords** check box.
  9. Click **OK**.

---

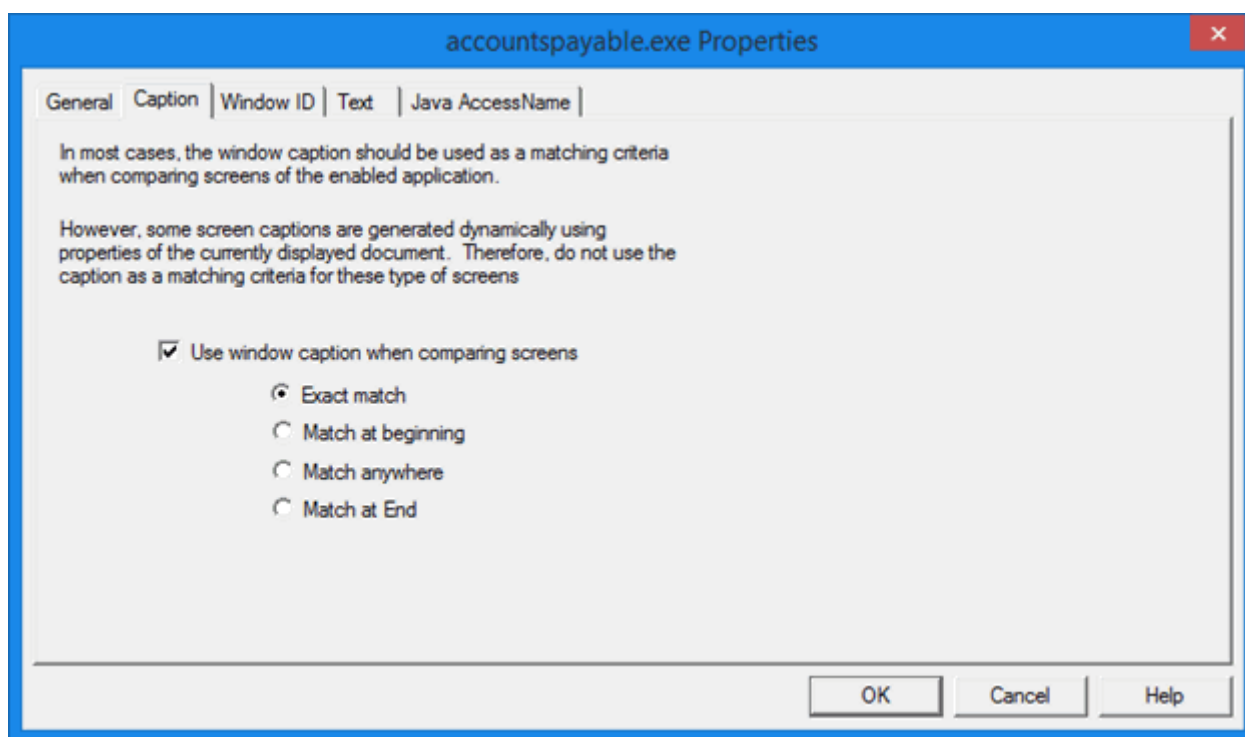
**Note:** Mouse/keyboard events can be changed after configuration by opening an existing configuration, selecting an application, clicking **Configure**, selecting a context, and clicking **Edit**.

---

## Caption

You can use the combination of Window ID and Caption to identify a screen. If both are selected, a screen must meet all of the criteria in order to be identified by Application Enabler.

You can identify a screen by its caption using the **Caption** tab:



The **Use window caption when comparing screens** option is selected by default. This is generally used when no Window ID exists. To identify the screen only by its caption:

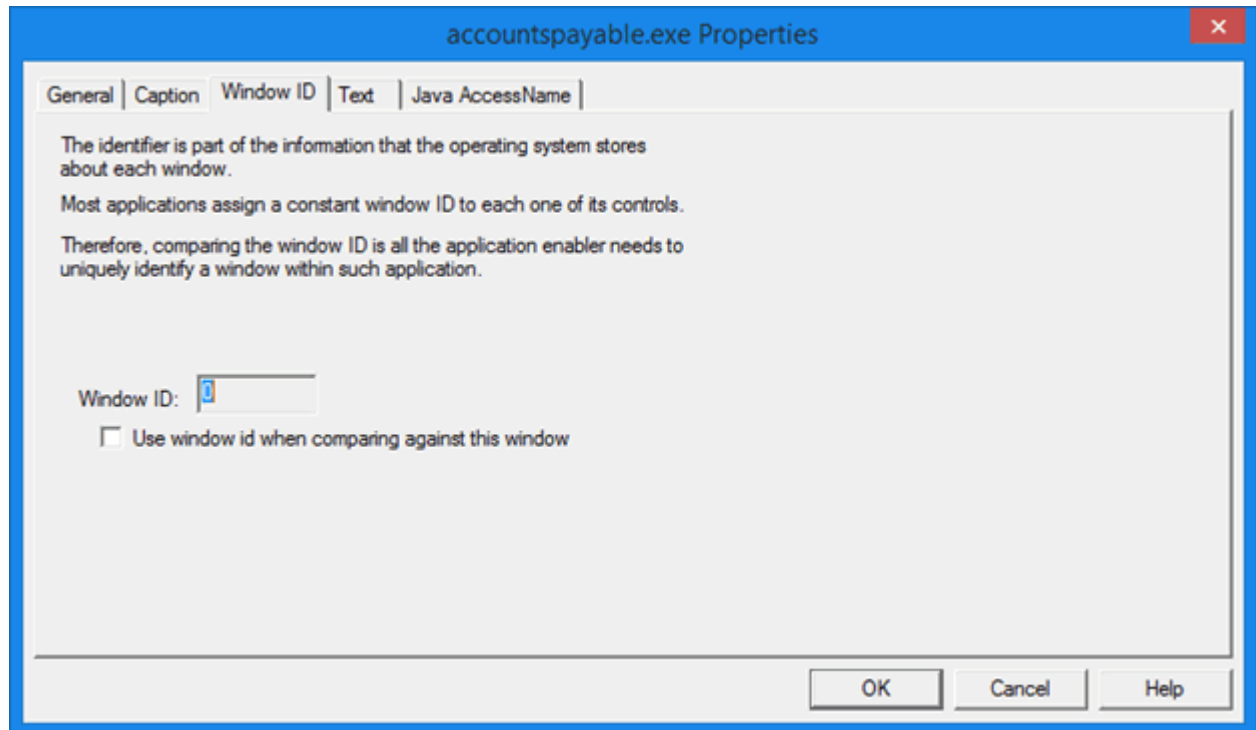
1. Clear **Use window id when comparing against this window** on the **Window ID** tab.
2. On the **Caption** tab, select the **Use window caption when comparing screens** check box and select one of the following options:

Options	Description
<b>Exact match</b>	The caption of a screen must exactly match the caption entered at the time of configuration.
<b>Match at beginning</b>	The caption of a screen must match the beginning of the caption entered at the time of configuration.
<b>Match anywhere</b>	The caption of a screen must match the caption entered at the time of configuration anywhere in the caption.
<b>Match at End</b>	The caption of a screen must match the end of the caption entered at the time of configuration.

3. Click **OK**.

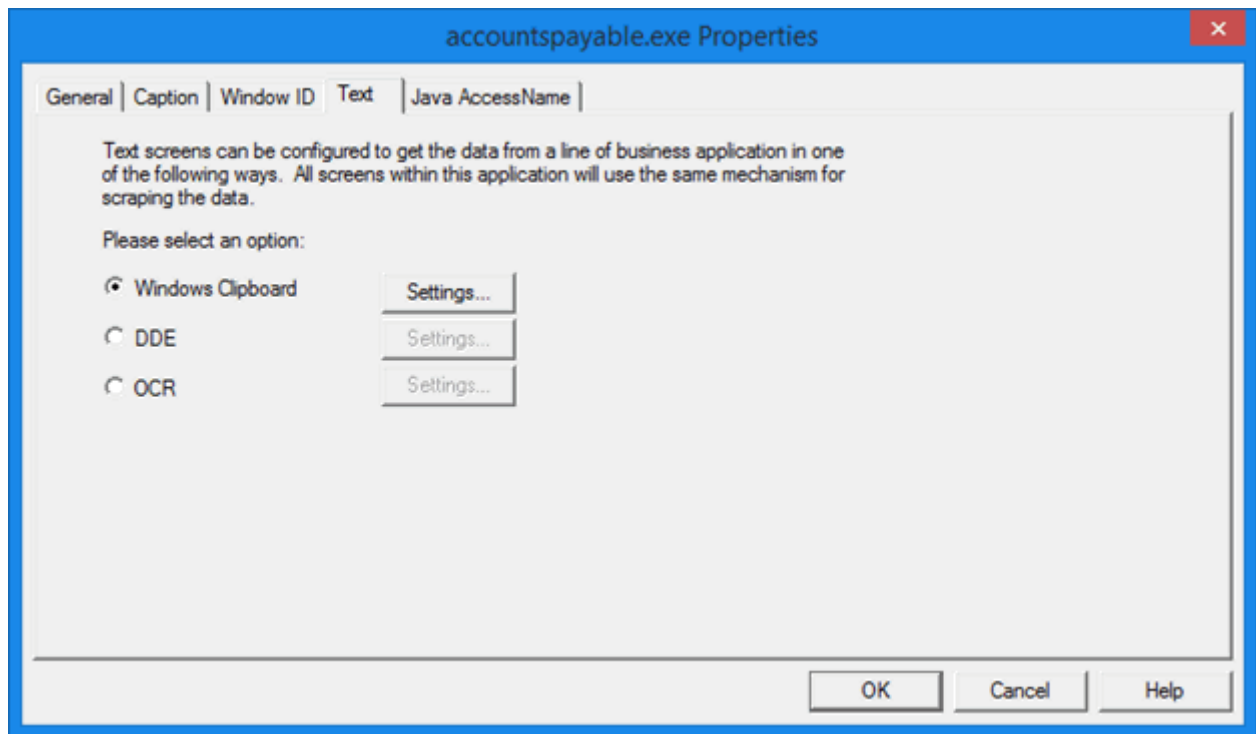
## Window ID

Application Enabler Configuration uses the Window ID as the identification of a screen. The **Use window id when comparing against this window** option must be selected on the **Window ID** tab:



## Text

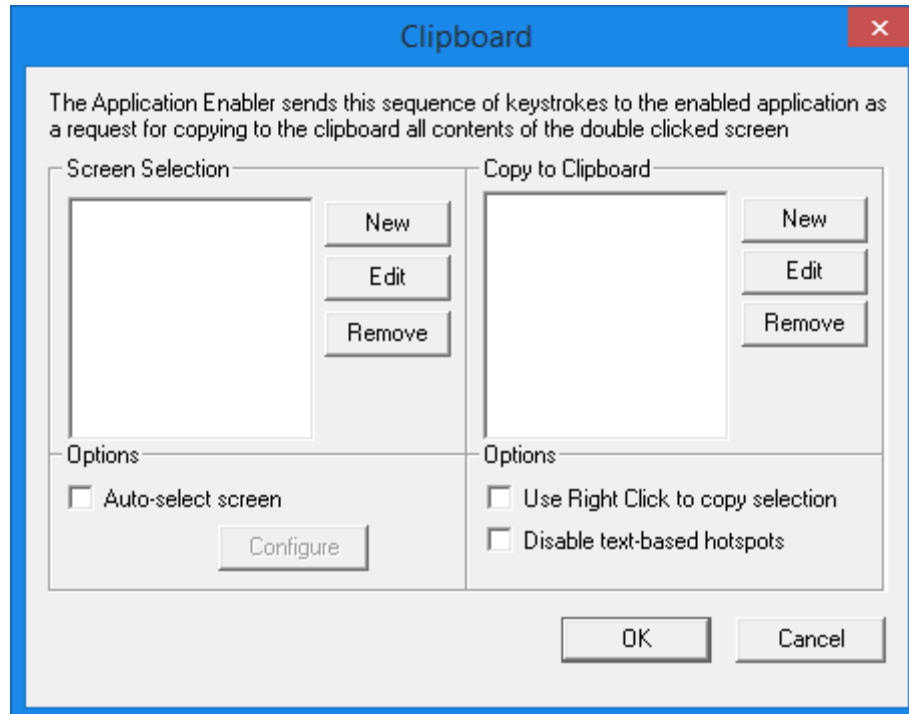
The **Text** tab is used to configure text screens.



Application Enabler supports three methods for scraping text screens. Select one of the buttons described in the following sections and click the corresponding **Settings** button to configure additional settings.



## Windows Clipboard

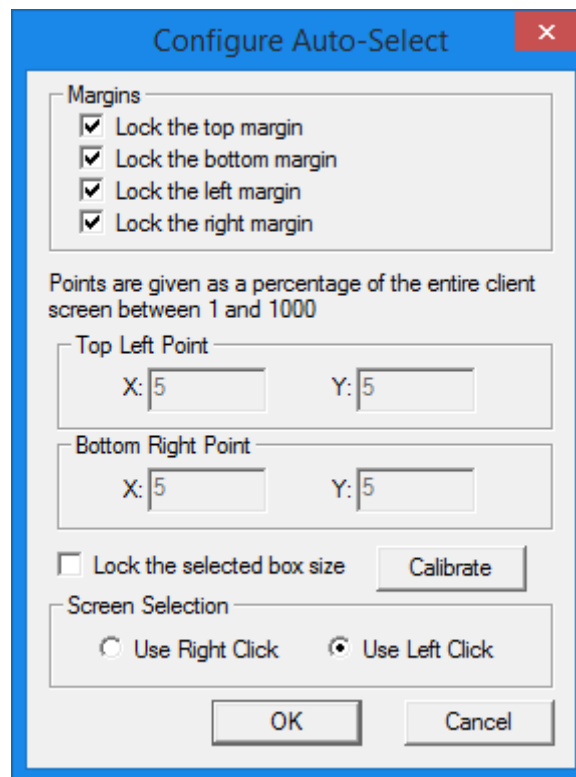


Application Enabler identifies text-based screens and screen data by the line and column location of characters on the text screen. In order to accurately map characters, Application Enabler copies each configured text screen to the Windows clipboard. The **Windows Clipboard** setting allows you to define which keystrokes are used to select a screen and copy it to the clipboard. In most cases, text-based applications will enable when the standard **CTRL + A** (select all) and **CTRL + C** (copy all) are used. Some applications may require alternate keystroke combinations.

1. Click **New**.
2. Enter the keystroke combination in the text field.
3. Click **OK**.

Some applications require automatic selection of the screen to copy text to the clipboard. In this case, select **Auto-select screen**. When this option is selected, the **Configure** button is enabled. To configure the **Auto-select screen** option:

1. Click **Configure**. The **Configure Auto-Select** dialog box is displayed.



2. Select **Lock the top margin** to keep the top margin the same size (in pixels) no matter how the client window is resized.
3. Select **Lock the bottom margin** to keep the bottom margin the same size (in pixels) no matter how the client window is resized.
4. Select **Lock the left margin** to keep the left margin the same size (in pixels) no matter how the client window is resized.
5. Select **Lock the right margin** to keep the right margin the same size (in pixels) no matter how the client window is resized.
6. Select **Lock the selected box size** to keep the box that was selected in the client screen stay the same size no matter how the client window is resized. This option can be used along with the **Lock the top margin** and **Lock the left margin** options to keep the selected area in the same place no matter how the client area is resized.
7. If you want to specify the area of an application that should be auto-selected, click **Calibrate**. This option should only be used for applications that have auto-selection enabled.

8. If you want to use the right mouse button to select the screen, select **Use Right Click**. If you want to use the left mouse button to select the screen, select **Use Left Click**.
9. On the line of business application, click and drag the mouse pointer across the client area that you want to be auto-selected. Coordinates will be populated in the point fields.

As check boxes are checked and unchecked the edit boxes for the initial and ending points become enabled. These values can be edited manually. These values are based on a percentage of the screen out of 1000.

---

**Note:** If the box is not enabled the value inside the box is not restricted to a percentage.

---

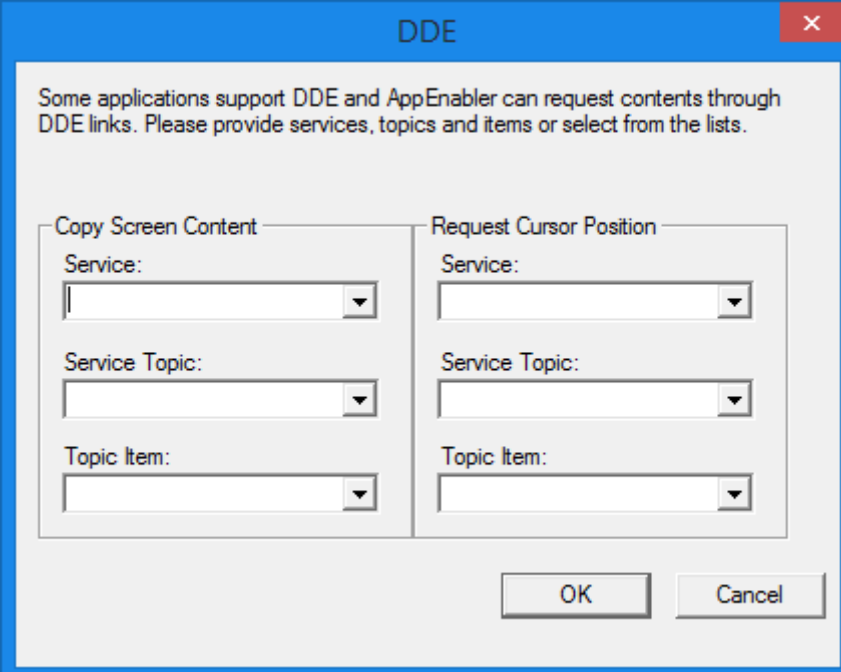
If locks are changed while in the auto-select dialog the calibrate button must be used to select the box in the client screen.

Some applications may require that you right-click to copy to the clipboard. In this case, select **Use Right Click to copy selection** to automatically trigger the right-click action when a screen is selected.

If the **Disable text-based hotspots** option is selected, scraping from text screens will be faster. It will also disable hotspots as well. This setting should be used whenever a text-based application does not require using hotspots. This option is disabled by default.

Click **OK** when you have completed configuration.

## DDE



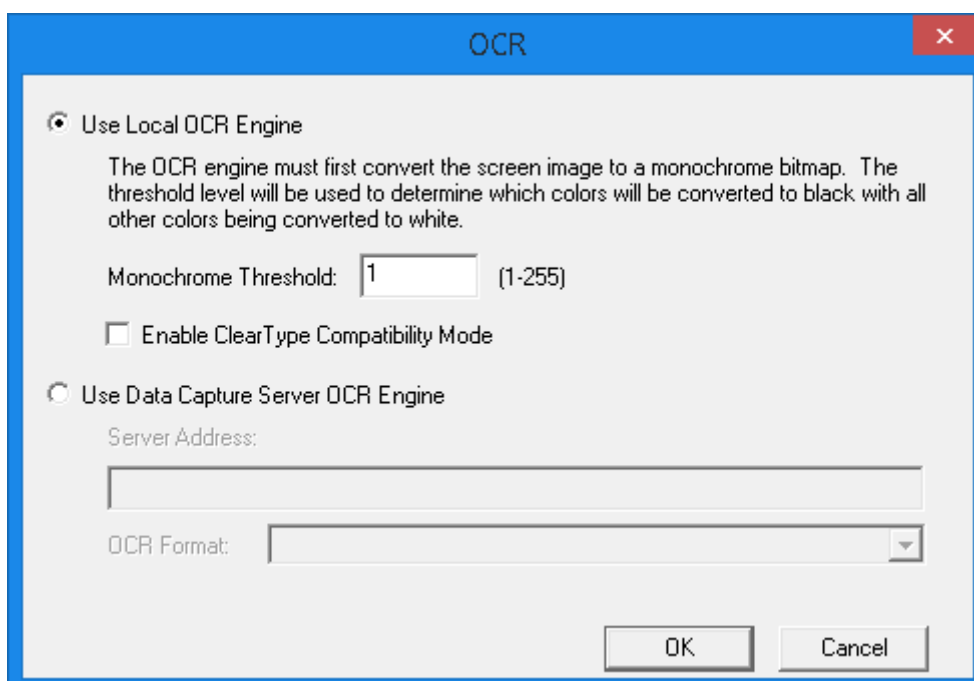
The screenshot shows a dialog box titled "DDE" with a blue header bar and a red close button in the top right corner. The main area has a light gray background and contains the following text: "Some applications support DDE and AppEnabler can request contents through DDE links. Please provide services, topics and items or select from the lists." Below this text are two side-by-side panels. The left panel is titled "Copy Screen Content" and the right panel is titled "Request Cursor Position". Each panel contains three dropdown menus: "Service:", "Service Topic:", and "Topic Item:". At the bottom of the dialog are two buttons: "OK" and "Cancel".

The **DDE** setting should be used for text-based applications that do not communicate with the clipboard. DDE is the preferred method to use with text-based applications. DDE should be used and only if this fails should the clipboard method be used. In order to configure the DDE tab, you need to know the **Service**, **Service Topic**, and **Topic Item** for screen contents and cursor positions. These may be listed in the drop-down lists; otherwise, check server references and input manually.

Another use for the DDE setting is if you want to configure multiple hotspots on a text-based application that could potentially have the same value. Without the use of the DDE setting, the first instance of the value scraped would be used. Using the DDE option can help identify where on the screen the value was scraped from.

Click **OK** when you have completed configuration.

## OCR



The OCR configuration dialog box has a blue title bar with the text "OCR" and a red close button. It contains two radio button options. The first option, "Use Local OCR Engine", is selected. Below it is a text box for "Monochrome Threshold" with the value "1" and a range "(1-255)". There is also an unchecked checkbox for "Enable ClearType Compatibility Mode". The second option, "Use Data Capture Server OCR Engine", is not selected. Below it is a text box for "Server Address:" and a dropdown menu for "OCR Format:". At the bottom right are "OK" and "Cancel" buttons.

OCR

☒ Use Local OCR Engine

The OCR engine must first convert the screen image to a monochrome bitmap. The threshold level will be used to determine which colors will be converted to black with all other colors being converted to white.

Monochrome Threshold:  (1-255)

☐ Enable ClearType Compatibility Mode

☐ Use Data Capture Server OCR Engine

Server Address:

OCR Format:

OK Cancel

The **OCR** setting must be used if you are configuring Application Enabler to use OCR with this application.

1. Select which OCR engine should be used.
  - To use the native OCR engine, select **Use Local OCR Engine**.
  - To use the Data Capture Server OCR engine, select **Use Data Capture Server OCR Engine**.

---

**Note:** Select **Enable ClearType Compatibility Mode** or use the Data Capture Server OCR engine if the application you are enabling uses ClearType fonts.

---

**Note:** Additional licensing and configuration is required in order to use the Data Capture Server for OCR processing. See [Data Capture Server on page 326](#) for information.

---

2. If you selected **Use Local OCR Engine**, configure the **Monochrome Threshold** value, if necessary. The Monochrome Threshold value is internally used by the local OCR engine. For most applications, the default value of **1** will be sufficient. Modify this value only when the default value does not work for the screens in your application.
3. If you selected **Use Local OCR Engine**, and the application you are enabling uses ClearType fonts, select **Enable ClearType Compatibility Mode**.
4. If you selected **Use Data Capture Server OCR Engine**, configure the following settings:
  - **Server Address** - Enter the server address for the Data Capture Server. The server address must be the net.tcp address to the Data Capture Server, for example:  
`net.tcp://localhost:9050/Hyland.DataCapture.ServiceManager/service`
  - **OCR Format** - Select the OCR format to be used.

---

**Note:** For information on configuring OCR formats, refer to the **Full-Page OCR** module reference guide.

---

5. Click **OK** when you have completed configuration.

## Save and Close

Save the configuration by clicking **Save**. After saving the current configuration, Application Enabler Configuration automatically performs a health check of the configuration file. This health check helps identify configurations that may be invalid.

For example, if you configure a retrieval or indexing context but do not configure a Document Type, you will be prompted that your configuration may be invalid.

Any health check warnings that are presented are saved to a text file in the same location as the XML configuration file. This file is named **[name of XML configuration file].xml.warning.txt**.

Be sure that the directory that you save the configuration file in is available to all users that will need to use Application Enabler in conjunction with the enabled application. Click **Save**.

---

**Note:** A single Application Enabler configuration file is limited to 30 enabled applications.

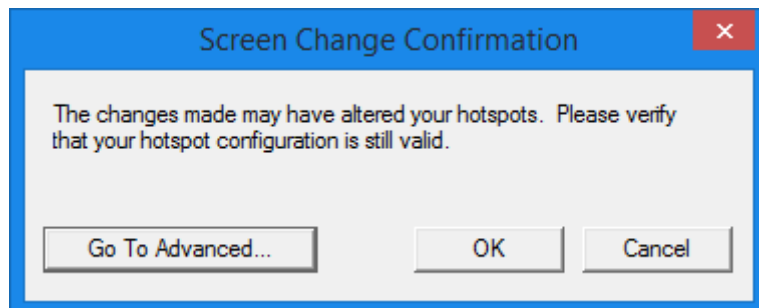
---

## Opening Existing Configurations

Refresh Application Enabler by closing and restarting the application. Open the configuration file by selecting **Load Configuration** in Application Enabler. Enable the event capturing process and test your configuration to ensure that it retrieves the desired documents.

## Editing Existing Configurations

When you change an existing configuration file, changes made may affect existing hotspot configuration. When a configuration change may have affected a hotspot configuration, the following dialog box is displayed.



Click **OK** to continue with the configuration.

Click **Go To Advanced** to go to the **Hotspots Configuration** dialog box to confirm the configuration changes are correct.

Click **Cancel**, to cancel your changes.

## Enabling Windows Applications

### Configuration Overview for Windows Applications

The Windows configuration process creates links between Windows-based line-of-business application data fields and OnBase Keyword Types. After opening Application Enabler Configuration, create links by doing the following:

1. Open the line-of-business application to enable. See [Open the Line-of-Business Application on page 89](#).
2. Create links between line-of-business application fields and Document Types and Keyword Types. See [Create Links Between Line-of-Business Application Screens/Fields and System Keywords on page 89](#).
  - Create a new Windows screen configuration in Application Enabler Configuration.
  - Identify the Windows screen to enable.

- If no **Name** is displayed on the **General** section, click **View Window Info Tree** and find the 'parent' of the control you are going to use. See [View Window Info Tree on page 92](#) for more information.
  - If necessary, adjust the mapping rules that Application Enabler will use to uniquely identify keywords on the line-of-business screen, with options provided after clicking **Configure Mapping Rules**.
3. Log on to OnBase. You have access to only those documents for which you have been granted rights. See [Logging on to OnBase on page 96](#).
    - Select the Document Types of the documents to be retrieved when on the line-of-business application screen. See [Select Document Types on page 97](#).
  4. Establish a link between the OnBase Keyword Types, Unity Form fields, or WorkView attributes to a location on the line-of-business application screen. See [Associating Keyword Types, Unity Form Fields, or WorkView Attributes on page 98](#).
    - Click **Settings** to access formatting options. Select the appropriate stripping options to eliminate unwanted characters or spaces. Appropriate formatting options are available for date or currency. See [Settings on page 104](#).

---

**Note:** The formatting options on the **Strip**, **Parse**, and **Append** tabs can work in conjunction with one another. Formatting options are applied sequentially, such that options on the **Strip** tab are applied first, followed by options on the **Parse** tab, and then by options on the **Append** tab. Options on these tabs are also applied sequentially, from the top of the tab to the bottom of the tab.

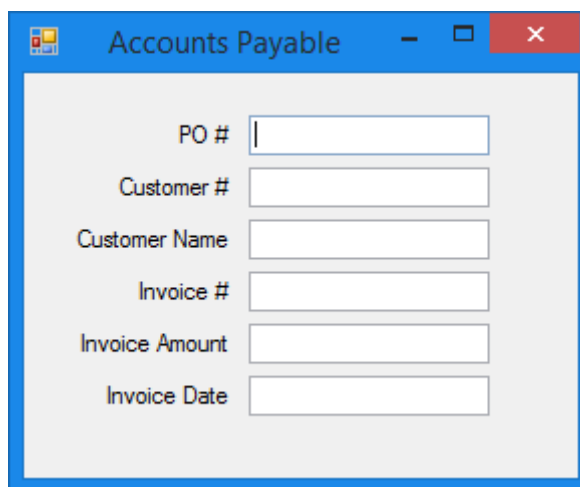
---

5. Configure properties. See [Properties Dialog Box on page 115](#).
  - Choose the mouse and/or keyboard event that triggers retrieval.
  - Specify how Windows based screens are identified (Window ID or Caption)
6. Save your configuration. See [Save and Close on page 125](#).
7. Optionally, configure hotspots. See [Configuring Hotspots on page 277](#).

## Step by Step Configuration

### Open the Line-of-Business Application

Open the line-of-business application you want to enable. An example application is shown below.



### Create Links Between Line-of-Business Application Screens/Fields and System Keywords

In order to create links with the line-of-business application:

1. Identify each line-of-business application screen to enable. A line-of-business application screen is a single window of information. Line-of-business applications can have many screens. You can enable one or many screens.
2. Identify, or map, each line-of-business application form field and its related OnBase Keyword Type. Line-of-business application screens can be composed of configurable form fields, non-configurable text, and other components.
3. Select keywords used for retrieval.
4. Identify optional hotspots. Hotspots allow you to retrieve OnBase documents based on values in a single line-of-business application field. If hotspots are not configured, documents are retrieved based on the value of all fields configured for the screen.

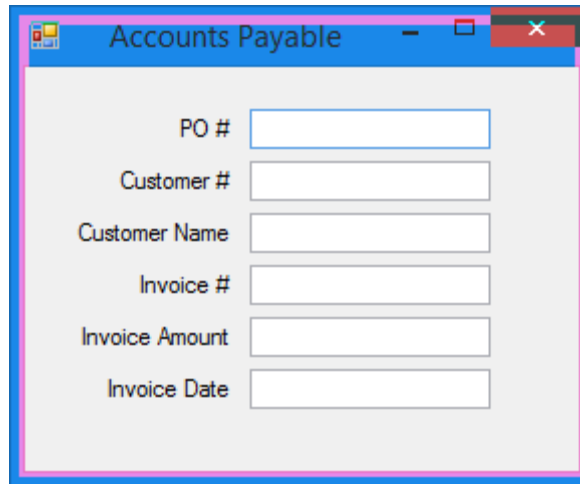
### Create a New Windows Screen Configuration

Open your line-of-business application and ensure that the screen you wish to enable is visible and can be selected with a single mouse click.



To begin enabling an application:

1. In Application Enabler Configuration, click **New Win-Screen** or the **Configure a new Windows screen** toolbar button.
2. As you move the mouse across the line-of-business application, areas of your screen are highlighted by a **selection box**, which encloses the area selected for capture. Place your mouse over the line-of-business application you wish to enable. Move your mouse until the selection box encloses the entire line-of-business application screen and left-click to select it. It is possible (but not necessarily desirable) to select individual line-of-business application form fields (i.e., text boxes), in which case the selection box encloses the form field.



3. Application Enabler Configuration extracts the name of the line-of-business application screen and displays the **Settings** dialog box:

The screenshot shows a 'Settings' dialog box with a blue title bar and a red close button. It contains two main sections: 'General' and 'Page Identification Elements'. The 'General' section has two text fields: 'Name' and 'Caption', both containing the text 'Accounts Payable'. Below these fields is a button labeled 'View Window Info Tree'. The 'Page Identification Elements' section features a table with three columns: 'Type', 'Id', and 'Value'. The table is currently empty. To the right of the table are three buttons: 'New', 'Edit', and 'Remove'. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

Type	Id	Value
------	----	-------

In some cases, the line-of-business application name may not appear as you wish. Rename the screen by replacing the default name provided in the **Name** field. If no **Name** is displayed on the **General** section, click **View Window Info Tree** and find the 'parent' of the control you are going to use.

4. If necessary, you can further identify the screen by adding **Screen Identification Elements**. Click **New** and select the screen element that you want to use for screen identification. You can change a selected screen identification element by clicking **Edit**. The **Info Tree** window will display. For more information about this window see [Configuring Mapping Rules on page 93](#). You can delete a selected screen identification element by clicking **Remove**.

5. If necessary, adjust the mapping rules that Application Enabler uses to uniquely identify keywords on the line-of-business application screen, with options provided by clicking **Configure Mapping Rules**. For more information, see [Configuring Mapping Rules on page 93](#).
6. Click **Next**.

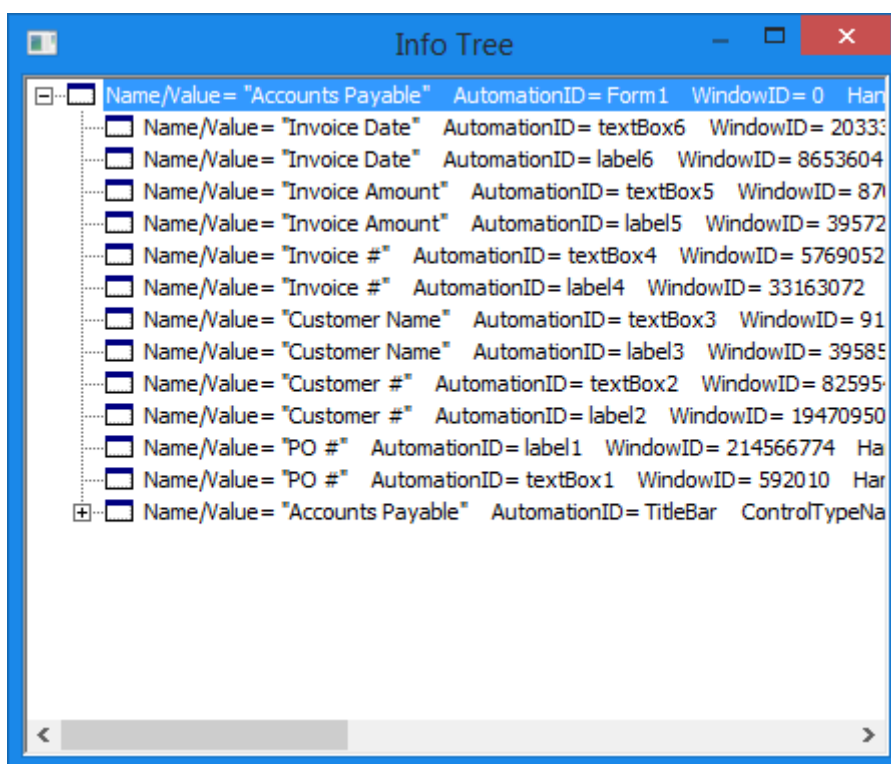
---

**Caution:** If you change the text in the **Caption** field and you are using the caption to identify the screen, the screen may not be identified correctly for your configuration. If this occurs, you must reconfigure the enabled application to reflect the changed caption text.

---

## View Window Info Tree

Clicking **View Window Info Tree** in the **Settings** dialog box opens the **Info Tree** dialog box:



This dialog box contains the following information for the application and the application's fields:

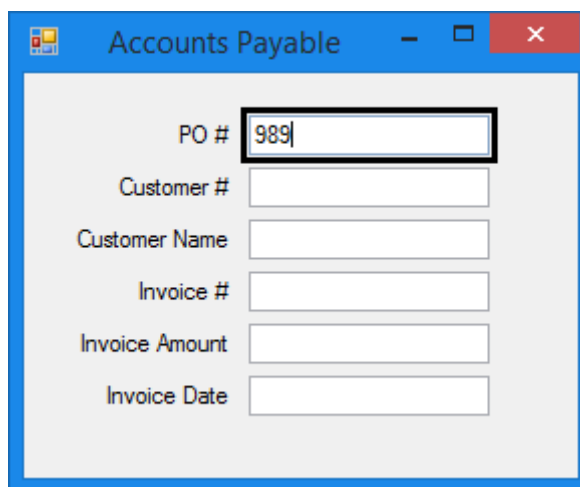
- Caption/Value
- Window ID
- Window Handle
- Class Name

This information can be helpful during configuration. This dialog box allows you to identify the parent window, a sub window, or field. To identify any parent, window, or field, right-click on any item and select **Highlight**.

In addition, you can right-click on the window and select **Search** to search. For Smart-Screen, Windows-based, text-based, HTML-based, and Dynamics GP-based applications, the Caption/Value item will be searched. For Java-based applications, Value, AccessName, and AccessDescription will be searched.

You can also right-click on the window and select **Save As** to save the data in the **Info Tree** dialog box to a text file.

A black box flashes four times around the window or field, represented by the selected item, in the enabled application.



You can select the window or field you wish to enable from the **Info Tree** dialog box by right-clicking on the item you wish to enable and selecting **Use Selected Window**. The window or field you selected will be the enabled control that is used to gather user input in the enabled application.

## Configuring Mapping Rules

Windows-based application configuration involves mapping keywords and hotspots. In many cases, the default settings allow Application Enabler Configuration to accurately map fields. Use the default settings for your first configuration attempt. Click **Next** to continue. If you accept the default settings, skip to the [Logging on to OnBase on page 96](#) and continue your configuration.

If your application does not enable during your first configuration attempt, you may need to repeat the configuration process and adjust the mapping rules described below.

If the default settings do not successfully map keywords and hotspots, you can adjust the way Application Enabler identifies them by clicking the **Configure Mapping Rules** button on the **Settings** screen and changing options on the following tabs:

Tab	Description
<b>Order</b>	The order in which child windows of the screen window are enumerated may be used as mapping criteria. Using just the order as mapping criteria is the most efficient mapping style for applications that keep the enumeration constant. To use the order as mapping criteria select the <b>Use window order when comparing against this screen</b> check box. This option is enabled by default.
<b>Window ID</b>	The Window ID is displayed on the <b>Window ID</b> tab. It is one of the properties that the operating system stores for each screen. Most applications assign a constant, unique Window ID to each of its controls, which allows Application Enabler to use the Window ID to uniquely identify a window within the application. For this reason, the Window ID is selected as the default means of identifying a screen. When a Window ID is not detected during configuration, a value of <b>0</b> (zero) is stored as the Window ID. If you are configuring multiple screens in a single application and more than one of the screens stores a <b>0</b> , you must select an alternate means of window identification. To choose another identifier, disable the <b>Use window id when comparing against this window</b> check box and choose the <b>Order</b> or <b>Metrics</b> tab.
<b>Metrics</b>	<p>Some applications display screens within a parent window. When enabling this type of application, Application Enabler can use the position of the screen within the parent window to identify the screen.</p> <p><b>Relative Position</b></p> <p>If the application screen can be resized and the edit field is resized by an equal height/width ratio, Application Enabler can use the relative position of the field as an identifier. The relative position is measured as a percentage of the length or height of the application screen. <b>Horizontal Location</b> and <b>Vertical Locations</b> are the options available.</p> <p><b>Accepted Delta Variance</b></p> <p>Most applications render their screens using the exact same size and location for all fields within a given screen. Some applications render fields within a screen at a slightly different location and/or size depending on the hardware, fonts, operating system, and other factors. This variance keeps Application Enabler from being able to identify such fields. This setting only applies when using metrics for the mapping rules. The value for the <b>Accepted Delta Variance</b> specifies how many units the X or Y coordinates of enabled elements can vary before the elements are no longer matched by the Application Enabler. See <a href="#">Determining the Accepted Delta Variance on page 95</a> for more information.</p>

**Note:** When configuring screens, the settings are remembered from the previous screen's

settings within the application.

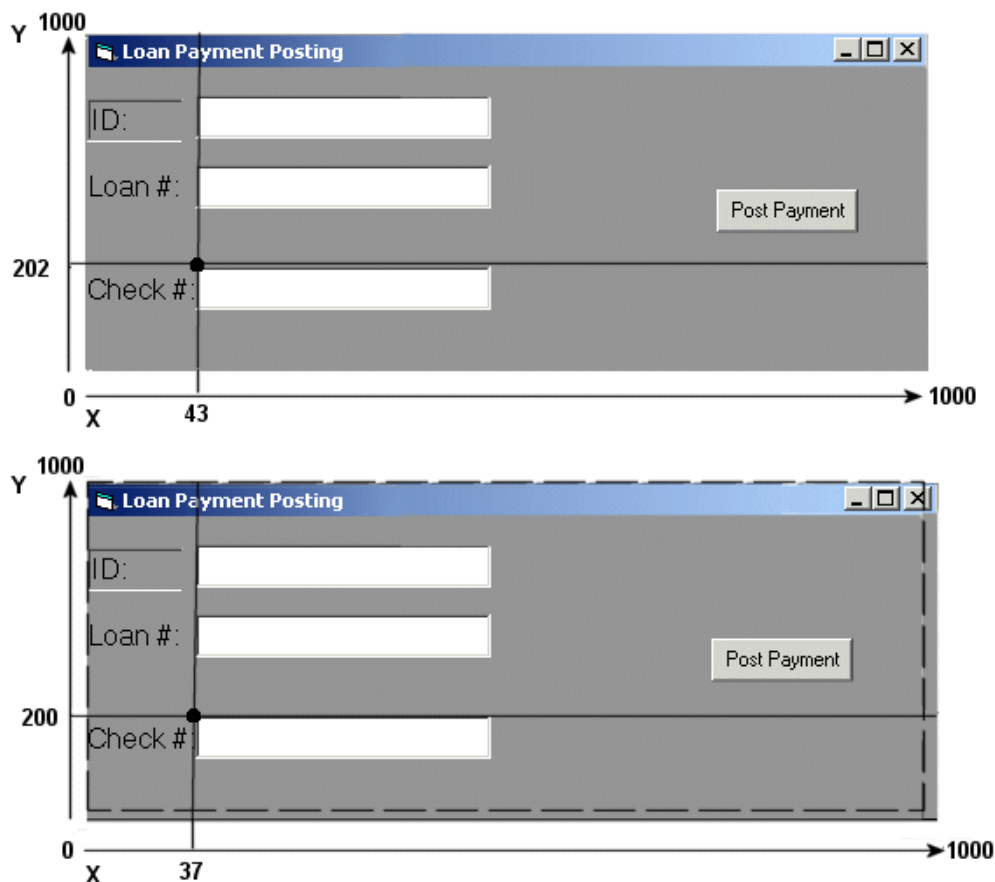
---

## Determining the Accepted Delta Variance

To find the appropriate **Accepted Delta Variance**, Verbose Mode must be enabled. A Verbose file (**AEVerbose.txt**) is created in the system's TEMP directory, defined in the system's Environment Variables. The Verbose file captures the current X and Y coordinates for scraped values when an enabled element is selected.

In order to find the smallest variance to identify the selected element, the enabled application may need to be tested on multiple systems. The following are examples of Verbose files with information pertaining to an application that has a resizable window. The first Verbose file is related to a smaller window size. The second relates to a larger window size. The greater difference of the X or Y coordinates should be used as the **Accepted Delta Variance** value. The following example shows an application window in two different sizes. Different sizes of application windows can occur when computers have different resolutions or the application window has been resized. The first window is a smaller window. The enabled field is positioned at the following coordinates: 43, 202. The second window is slightly larger. The box drawn with

a dotted line in the second window represents the size of the first window. In the slightly larger window, the enabled field is positioned at the following coordinates: 37, 200. If a delta variance is not set, this slight change in coordinate values will cause Application Enabler to not identify the field.



In this example, the difference for the X coordinate is 6. The difference in the Y coordinate is 2. Performing tests like this example can help you decide how much variance to allow. In this example, the **Accepted Delta Variance** value would have to be equal to or greater than 6 units in order for the enabled field to be identified by Application Enabler in both window sizes. The average **Accepted Delta Variance** is between 10 and 20.

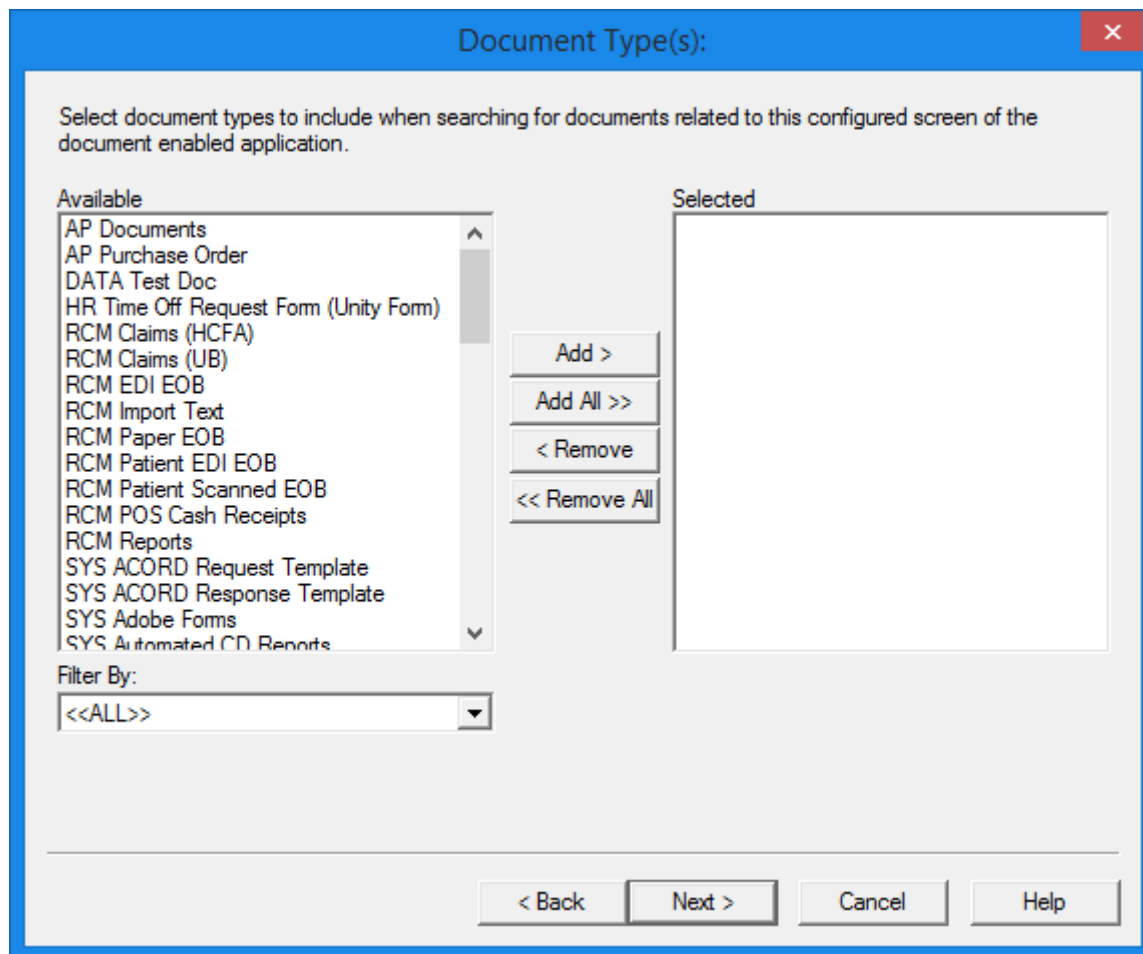
## Logging on to OnBase

If you are not currently connected to OnBase, a window opens and prompts you to log on.

1. Select the appropriate data source from the drop-down list. This drop-down list is only displayed when multiple data sources are available.
2. Type your OnBase user name.
3. Type your OnBase password.
4. Click **Login** to log on, or click **Cancel** to close the dialog without logging on.

## Select Document Types

The **Document Type(s)** dialog box is displayed:



1. Select the Document Types to search when retrieving OnBase documents through the line-of-business application. If you want to display all documents related to a screen, select all the Document Types that a user could possibly need from this screen. If you want to display only documents most relevant to a screen, select only the Document Types that most closely relate to the screen. Cross-referencing can be used to find other less closely related documents. Hold down the **Ctrl** key while selecting Document Types to select multiple Document Types that are not consecutively listed. Hold down the **Shift** key while selecting Document Types to select multiple Document Types that are consecutively listed.

---

**Note:** A Document Type is not required if you are configuring Healthcare Module Keyword Types or WorkView attributes.

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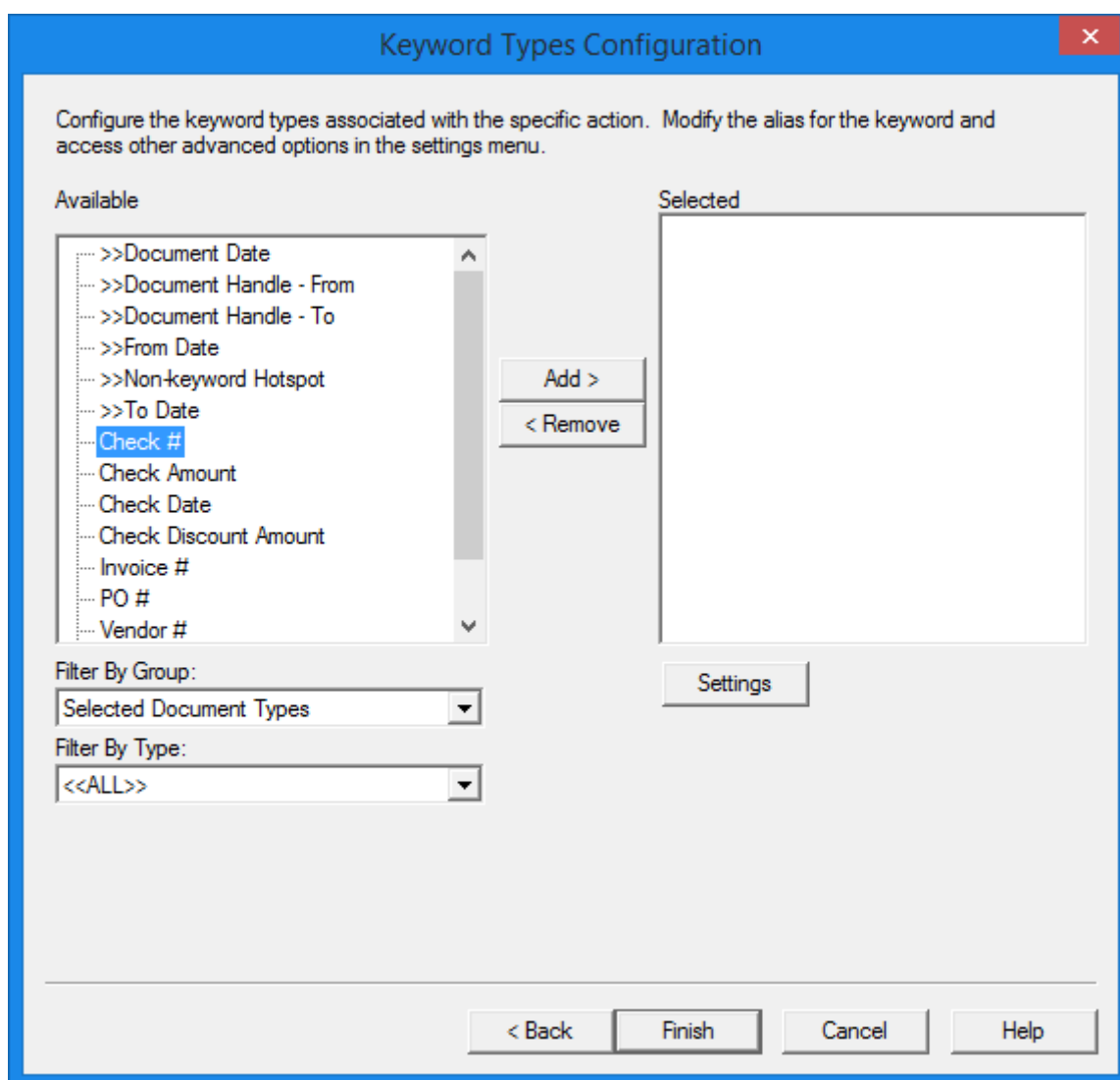
2. Select one or multiple (using the Ctrl or Shift keys) Document Types from the **Available** list and click **Add** to add them to the **Selected** list. To add all Document Types, click **Add All**.  
To remove one or multiple (using the Ctrl or Shift keys) Document Types from the **Selected** list, select the Document Type(s) and click **Remove**. To remove all Document Types, click **Remove All**.
3. To filter available Document Types by Document Type Group, select a Document Type Group from the **Filter By** drop-down list.
4. Click **Next** to continue.

---

**Caution:** Specific Currency Keyword Types are not currently supported for use with Application Enabler.

---

After selecting Document Types, the **Keyword Types Configuration** dialog box is displayed.



This screen allows you to associate Keyword Types, Unity Form fields, or WorkView attributes with the configured screen.

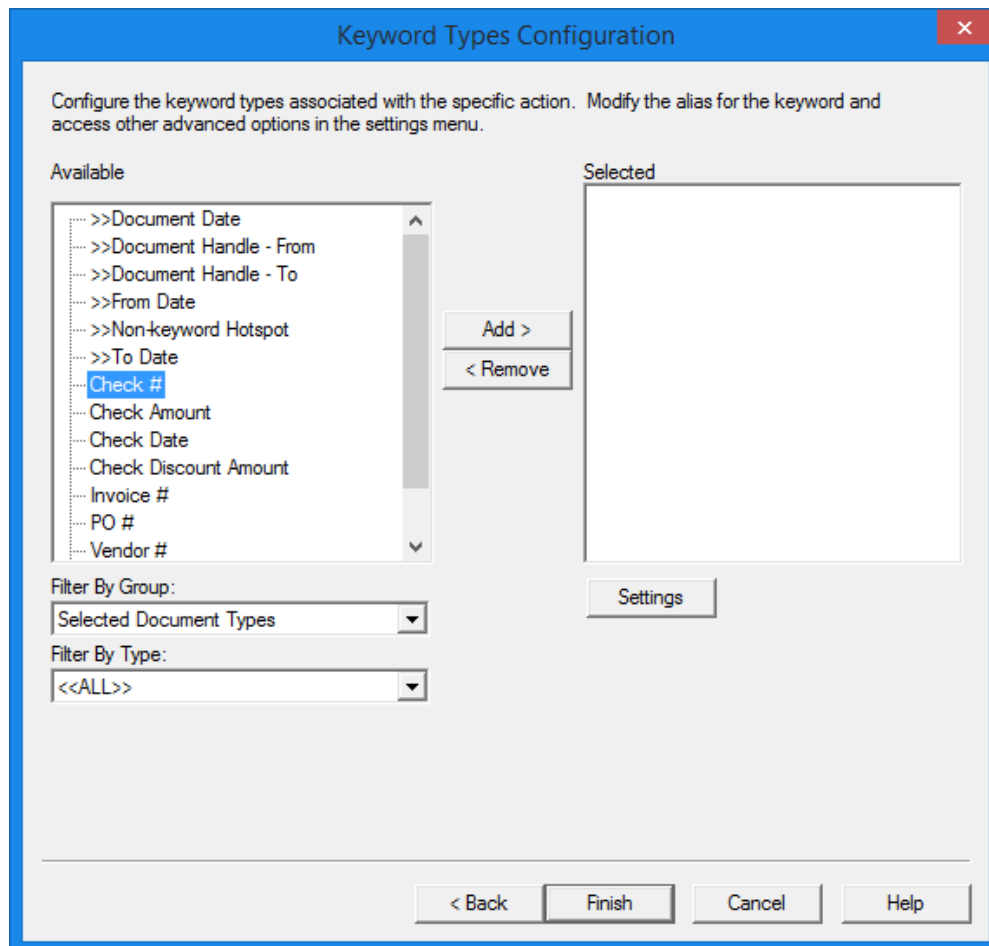
You can filter the **Available** list using the **Filter By Group** and **Filter By Type** drop-down lists. These two drop-down lists work together to narrow down the items that are displayed for easy selection and configuration. The **Filter By Group** drop-down list includes the following:

Filter By Group	Description
<b>Combined View Types</b>	<p>When selected, the <b>Available</b> list displays any Combined View Types associated with the Document Type(s) that were selected on the <b>Document Type(s)</b>: screen.</p> <p>The <b>Filter By Type</b> drop-down list contains the available Combined View Types.</p>
<b>Government Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase government module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the <b>Plan Review</b> selection, which is for the Electronic Plan Review module.</p>
<b>Healthcare Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase healthcare module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the following OnBase healthcare modules:</p> <ul style="list-style-type: none"> <li>• DeficiencyPop</li> <li>• RAC Audit</li> <li>• Patient Window</li> </ul> <hr/> <p><b>Note:</b> The ChartPop, DeficiencyPop, and LongitudinalPop options are maintained for legacy purposes only. For new medical deployments, please use the OnBase Patient Window.</p> <hr/>
<b>Selected Document Types</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the Document Type(s) that were selected on the <b>Document Type(s)</b>: screen.</p> <p>The <b>Filter By Type</b> drop-down list contains the Document Types that were selected on the <b>Document Type(s)</b>: screen.</p>
<b>Unity Form Templates</b>	<p>When selected, the <b>Available</b> list displays any Unity Form fields associated with the Unity Form template selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of Unity Form templates.</p>

Filter By Group	Description
<b>Workview App</b>	<p>When selected, the <b>Available</b> list displays any WorkView attributes associated with the WorkView class that is selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of WorkView classes.</p> <hr/> <p><b>Note:</b> The following WorkView attribute Data Types are not supported for use with Application Enabler, and are not displayed during configuration: Text, Formatted Text, Document, Date/Time. External classes are not supported for use with Application Enabler. Multiple level relationships (for example, AssignedEmployee.Manager.FullName) are also not supported.</p> <hr/>

1. If you are configuring a Keyword Type, select the Keyword Type in the **Available** list and click **Add**.

Keyword Types that are mapped to system properties are available for configuration. See >>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date on page 102 for more information.



If you are configuring a Unity Form, select Unity Form fields in the **Available** list and click **Add**.

If you are configuring a WorkView attribute, select the attribute in the **Available** list and click **Add**. Nested attributes are displayed with a + symbol.

2. The Application Enabler Configuration selection box is enabled. Move your mouse until the selection box encloses the line-of-business application field you wish to associate.
3. To configure additional options, select an item in the **Selected** list and click **Settings**. See [Settings on page 104](#) for information on these options.

---

**Note:** Multiple fields can be mapped to a single Keyword Type. To map another field to a Keyword Type, complete steps 1-3. When a new field is mapped to a keyword that already is mapped to a field, the keyword name is followed by an incremental number in parenthesis, used to distinguish between the different mapped fields. Example: The second mapping of the Vendor Name Keyword Type to a field results in a Keyword Type name of Vendor Name (01). The third mapping results in a Keyword Type name of Vendor Name (02).

---



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**Note:** WorkView attributes, Unity Form fields, and module-specific Keyword Types can only be mapped to a field once.

---

4. Click **Next** to continue.

**>>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date**

The **>>Document Date**, **>>Document Handle - From**, **>>Document Handle - To**, **>>From Date**, **>>Non-keyword Hotspot**, and **>>To Date** Keyword Type selections have distinct purposes.

Keyword Type	Description
<b>&gt;&gt;Document Date</b>	<p>Allows you to map to the Document Date of a document during indexing.</p> <hr/> <p><b>Note:</b> The <b>&gt;&gt;Document Date</b> Keyword Type is not respected by all Application Enabler contexts. For more information, see <a href="#">Using Contexts on page 288</a>.</p> <hr/>

Keyword Type	Description
>>Document Handle - From	<p>Allows you to map to the <b>From</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b>, and <b>Application Enabler - Retrieve in Workflow</b> contexts, or generate document packets with the <b>Application Enabler - Generate Document Packets</b> context.</p> <p>To retrieve using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Retrieve Documents</b> and <b>Application Enabler - Retrieve in Workflow</b> will only retrieve the single Document Handle that matches the scraped value.</p> <p>To generate a document packet using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Generate Document Packets</b> will only generate the packet for that single Document Handle that matches the scraped value.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - From Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/> <p><b>Note:</b> When using the &gt;&gt;Document Handle - From Keyword Type with the <b>Application Enabler - Retrieve in Workflow</b> context, all other keywords that are passed in will be ignored.</p> <hr/> <p><b>Note:</b> In order for document retrieval to function as expected when using the <b>Document Handle</b> system keyword, the <b>Retrieve by Document Handle / File Name</b> product right must be assigned to the user's user group in the OnBase Configuration module.</p> <hr/>
>>Document Handle - To	<p>Allows you to map to the <b>To</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b> context.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - To Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/>
>>From Date	<p>Allows you to map to the <b>From</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

Keyword Type	Description
>>Non-keyword Hotspot	Allows you to map a hotspot to any screen element without mapping the element to a Keyword Type. This will allow a screen scrape to be initiated from any element on the screen. For example, using this selection, the hotspot could be mapped to a button on the screen that is not associated with a Keyword Value.
>>To Date	Allows you to map to the <b>To</b> date range for retrieving documents.  <b>Note:</b> When a >>From Date or >>To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the >>From Date and >>To Date fields in the OnBase Client and only show the scraped value.

## Settings

The **Settings** dialog box is opened by clicking the **Settings** button on the **Keyword Types Configuration** screen. Available settings are described in the following sections:

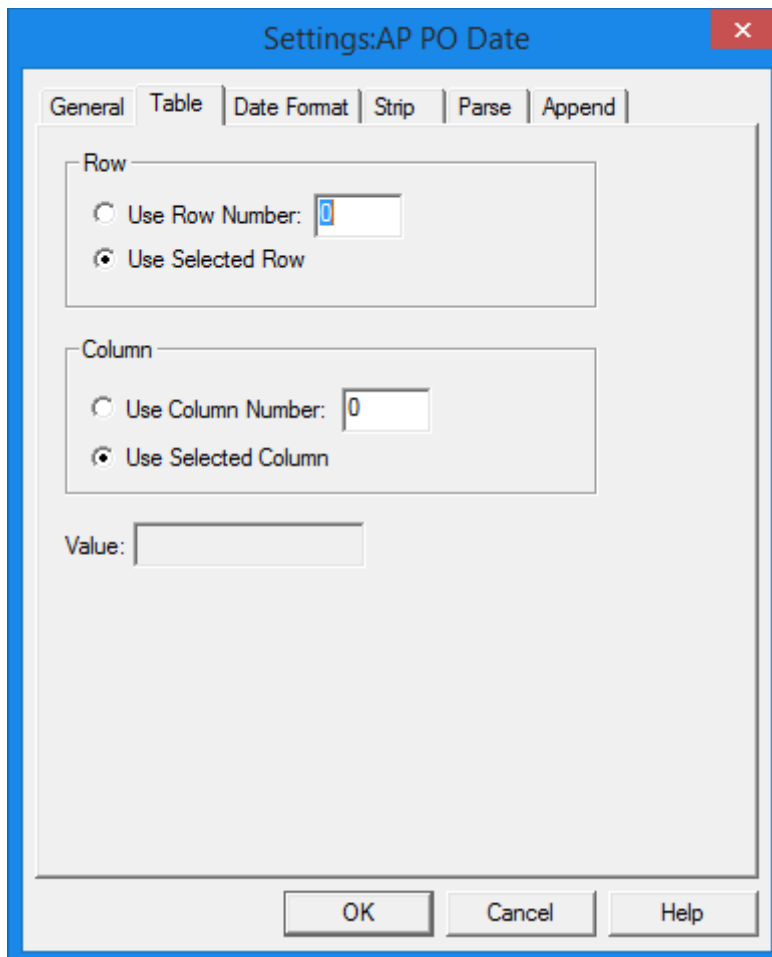
- [Setting a Keyword as Required on page 104](#)
- [Table on page 105](#)
- [Character Stripping on page 107](#)
- [Parsing on page 109](#)
- [Appending Prefixes and/or Suffixes to Scraped Keyword Values on page 111](#)
- [Currency Keyword Formatting on page 112](#)
- [Date Keyword Formatting on page 113](#)

### Setting a Keyword as Required

The **General** tab allows you to set a Keyword Type as a required keyword. To make a keyword required, select **Required keyword**. You can select either **Warn and continue** or **Warn and cancel** from the **Warning Level** drop-down list to determine if you want users to be able to continue a query that does not specify a value for a required keyword. You can also click **View Window Info Tree** to access the **Info Tree** dialog box. This dialog box can be used to identify fields to map to Keyword Types.

## Table

In some Windows applications, lists of information need to be enabled. When this is necessary, the **Table** tab is used to specify the appropriate row and column information. You can configure Application Enabler to scrape a static row/column or to use the value that exists in the row and column that is selected dynamically in Application Enabler.



The following settings are available on the **Table** tab:

Setting	Description
<b>Use Row Number</b>	Uses the row specified to obtain a value when the enabled list is selected in Application Enabler. This option creates a static row that cannot be changed.
<b>Use Selected Row</b>	Uses the row selected within the enabled list in Application Enabler to obtain a value. This option creates dynamic row selection.



Setting	Description
<b>Use Column Number</b>	Uses the column specified to obtain a value when the enabled list is selected in Application Enabler. This option creates a static column that cannot be changed.
<b>Use Selected Column</b>	Uses the column selected within the enabled list in Application Enabler to obtain a value. This option creates dynamic column selection.
<b>Value</b>	Displays the value of the row and column selected during configuration.

## Character Stripping

If you wish to retrieve documents based on a subset of characters within a value, you can configure Application Enabler to "strip" characters to exclude from the search using the **Strip** tab. For example, if a line-of-business application field contains a full phone number and you wish to retrieve OnBase documents based on area code, configure character stripping to remove all characters but the area code from the line-of-business application field.

Settings:AP PO#

General Strip Parse Append

Each strip option allows you to remove selected characters for the scraped value.  
Each option is applied in a top to bottom sequence.

☐ Strip spaces

☐ Strip any occurrences of string

String:

☐ Strip from beginning

Number of characters:

☐ Strip from end

Number of characters:

OK Cancel Help

The sequence of operation is from the top down. Application Enabler first strips spaces (if checked) then strips characters (if checked) and so on.

The following settings are available on the **Strip** tab:

Setting	Description
<b>Strip spaces</b>	Select <b>Strip spaces</b> to remove all spaces from the line-of-business application value, regardless of the location of the spaces. For example, if <b>Strip spaces</b> is selected, double-clicking on a properly configured line-of-business application field containing <b>2_2__16_44__</b> (where _ represents a space) will return OnBase documents with the Keyword Value <b>221644</b> .
<b>Strip any occurrences of string</b>	Select <b>Strip any occurrences of string</b> to strip all occurrences of a specific character from the line-of-business application value, regardless of the location of the character within the value. Enter the character you wish to strip in the <b>String</b> field. This option could be used to strip all dashes from a Social Security Number or an account number.  <b>Note:</b> Values are case sensitive.
<b>Strip from beginning</b>	Select <b>Strip from beginning</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the beginning of a value. For example, <b>Strip 5 Characters from Beginning</b> could be used to strip 3-digit area code enclosed in parentheses (###) from a telephone number.
<b>Strip from end</b>	Select <b>Strip from end</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the end of a value.

When your selection is complete, click **OK** to return to the **Keyword Types Configuration** screen. Define character-stripping options for each keyword that requires character stripping. Click **Next** to continue configuring Application Enabler.

## Parsing

The **Parse** tab allows you to extract characters and words from scraped values within the enabled application:

Settings:AP PO#

General | Strip | Parse | Append

Each parse option allows you to extract characters from the scraped value. Each option is applied in a top to bottom sequence.

☐ Extract from beginning

Starting position: 1

Number of characters: 1

☐ Extract from end

Starting position: 1

Number of characters: 1

☐ Word extraction

Starting position: 1

Number of words: 1

Separators:  Insert Tab

☐ Increment word count after each separator

☐ Count words from the end

OK Cancel Help

When parsing, Application Enabler attempts to find characters at the configured **Starting position**. Spaces are excluded from the configured **Number of characters**. For example, the **Starting position** is 1 and the **Number of characters** is 10. Application Enabler starts at 1, but encounters 8 spaces before a numeric character. In this example, Application Enabler excludes the 8 spaces from the **Number of characters** count, and the numeric character becomes the first of the 10 characters that Application Enabler will extract for the Keyword Value.

To extract characters starting at the beginning of a line:

1. Select the **Extract from beginning** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the Keyword Value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract characters starting at the end of a line:

1. Select the **Extract from end** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the keyword value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract words:

1. Select the **Word extraction** check box.
2. Enter the word number where the words that are to be extracted start in the **Starting position** field.
3. Enter the number of words you want to extract from the keyword value in the **Number of words** field.
4. Enter the character that separates the words in the **Separators** field. If you want to use a tab as a separator, click the **Insert Tab** button. A tab will be placed in the field.

---

**Note:** The default separator character is a space. Multiple characters can be entered into the field. Only one character can be used at one time and the character used must come from the list of characters entered into the **Separators** field. You must delete the space character from the field if you do not want to use spaces as separators.

---

5. If you want to account for blank values that may exist between separators, select the **Increment word count after each separator** option. This option will ensure that the number of values corresponds with the number of separators.
6. If you want to begin counting words from the end of the line, select the **Count words from the end** option.

---

**Note:** If **Count words from the end** is selected, Application Enabler will count back the specified number of words, and then extract the set number of words forward from that point.

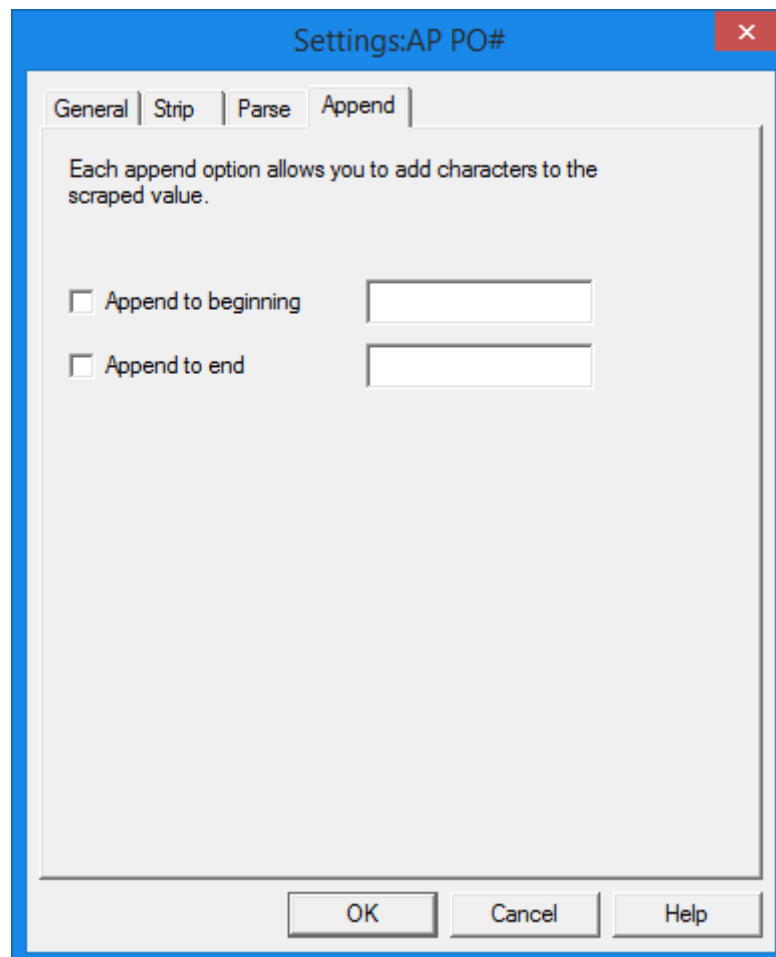
---

7. Click **OK** to return to the **Keyword Type Configuration** screen.

Advanced parsing is discussed in [Advanced Parsing on page 1](#).

## Appending Prefixes and/or Suffixes to Scraped Keyword Values

The **Append** tab allows you to configure a specific prefix and/or suffix to be affixed to scraped Keyword Values for the selected Keyword Type.



Settings:AP PO#

General | Strip | Parse | Append

Each append option allows you to add characters to the scraped value.

☐ Append to beginning

☐ Append to end

OK Cancel Help

To append a prefix or suffix:

1. Select the **Append to beginning** or **Append to end** check box(es).
2. Enter the value(s) in the field to the right of the selected check box(es).

---

**Note:** Values are case sensitive.

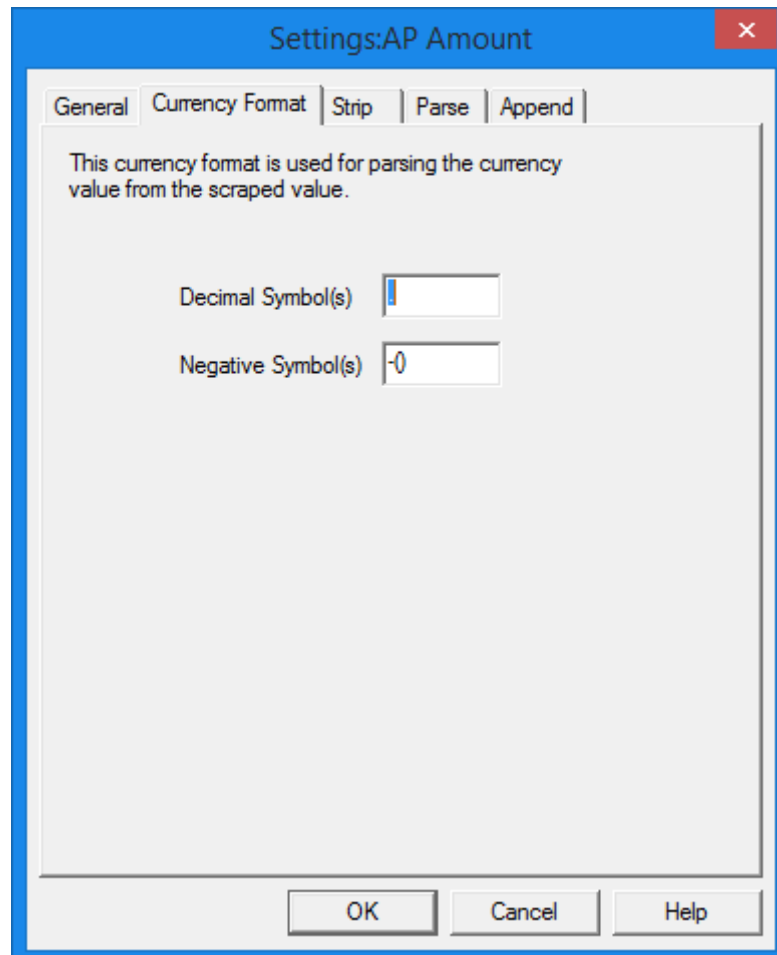
---

3. Click **OK** to return to the **Keyword Type Configuration** screen.

## Currency and Date Keyword Formatting

### Currency Keyword Formatting

For currency Keyword Types, the **Currency Format** tab is available:



In this tab, you can specify the symbol(s) to be used to separate the decimal places from the other places in values (**Decimal Symbol(s)**). You can also specify the symbol(s) to use for negative currency values (**Negative Symbol(s)**).

## Date Keyword Formatting

For date Keyword Types, the **Date Format** tab is available:

Settings:AP PO Date

General | Table | **Date Format** | Strip | Parse | Append

This date format is used for parsing all date fields out of the scraped value.

The format follows the rules for the Windows® regional date settings

Date Format:

Date Sample:

☐ Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)

OK Cancel Help

From the **Date Format** drop-down list, select the format of the date in the line-of-business application.

The following date formats are available:

Format	Example
<b>M/d/yyyy</b>	6/4/2010
<b>MM/d/yy</b>	06/4/10
<b>MM/dd/yy</b>	06/04/10
<b>MM/dd/yyyy</b>	06/04/2010
<b>yy/MM/dd</b>	10/06/04



Format	Example
yyyy-MM-dd	2010-06-04
dd-MMM-yy	04-Jun-10
MMddyy	060410
ddMMyy	040610

When a date value is scraped from the line-of-business application, the value will be converted to reflect the regional settings specified for the workstation.

If you will be scraping Umm al-Qura date values, select the **yy/mm/dd** date format and the **Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)** check box.

---

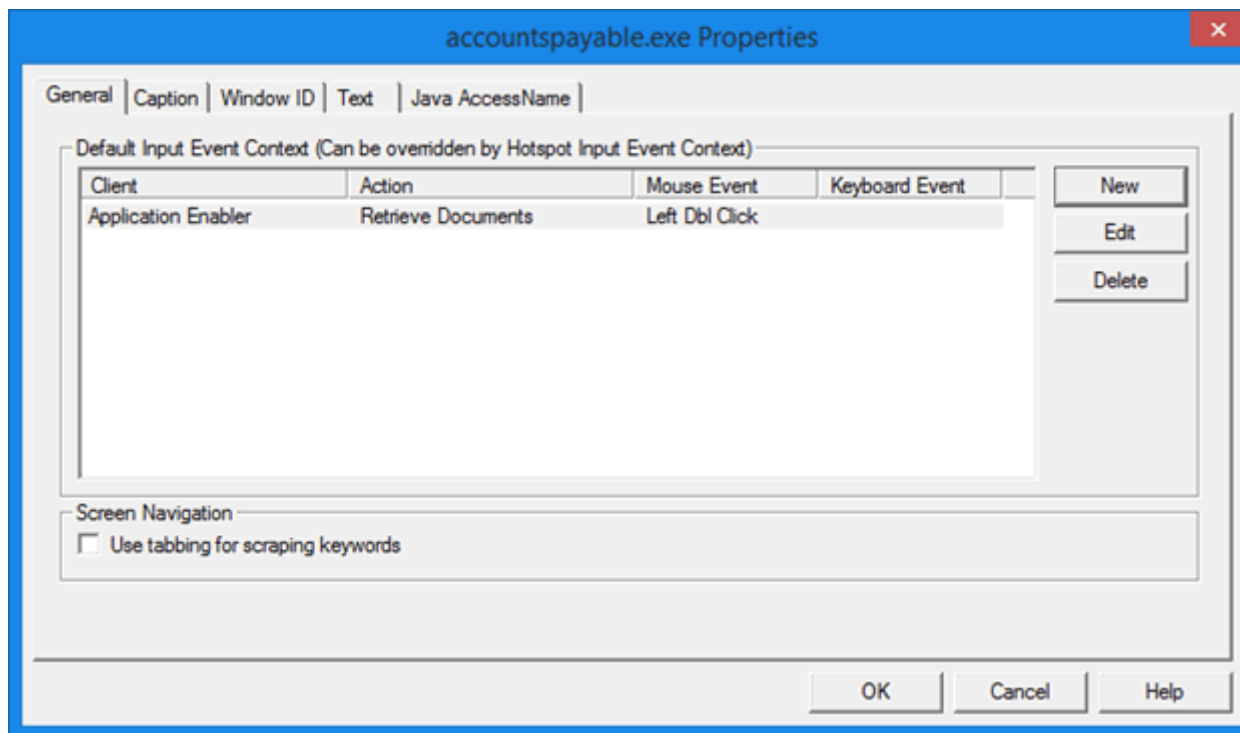
**Note:** You can only use Application Enabler contexts when scraping Umm al-Qura date values.

---

## Properties Dialog Box

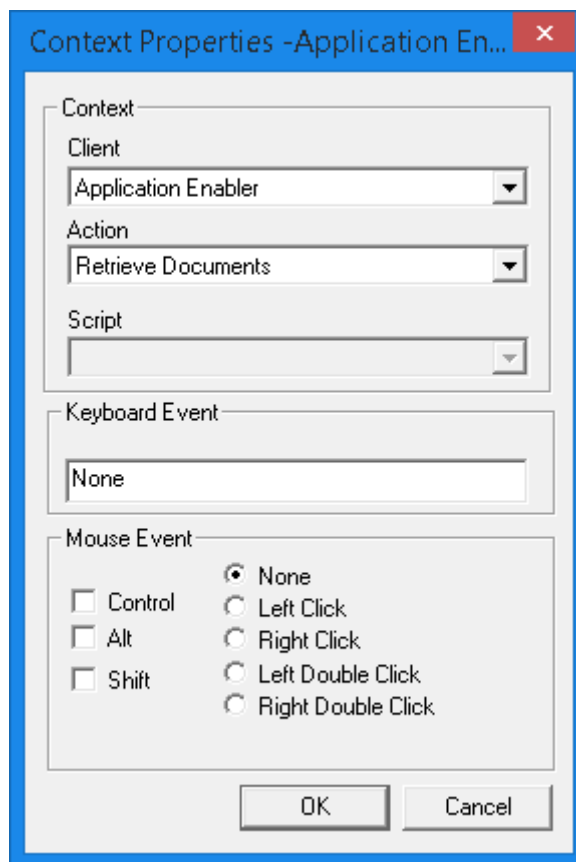
### Mouse and Keyboard Events and Contexts

The **General** tab is used to define the mouse or keyboard events used to trigger document retrieval.



**Note:** When **Desktop - Run Script** is configured as a context, the **Action** column will display the name of the VBScript.

1. To add a new mouse or keyboard event, click **New**.
2. The **Context Properties** dialog box is displayed:



3. Select the OnBase client that will be used to execute the context from the **Client** drop-down list, and the action to be executed from the **Action** drop-down list. For more information on available clients and actions, see [Using Contexts on page 288](#).
4. Depending on the action and context you have configured, you can select either a VBScript or a Unity Script to associate with the keyboard or mouse event from the **Script** drop-down list. The VBScripts and Unity Scripts that are available are those that have been configured for the database that is currently connected.
5. To define a keyboard event used to trigger a search, place your cursor in the **Keyboard Event** field and type the desired keystroke or keystroke combination. For example, press **Ctrl** and **F5** simultaneously to define **Ctrl+F5** as a keystroke combination.
6. To define a mouse event used to trigger a search, select the mouse event from the **Mouse Event** options (**Left Click**, **Right Click**, etc.). You can create a combination keystroke and click event by selecting the **Control**, **Alt**, or **Shift** options in addition to a click event.

When defining mouse events:

- It is recommended to use a keyboard key in addition to the **Left Click** and **Right Click** options. It is also recommended to not use similar mouse and keyboard events in the same application. For example, Shift+Left Click and Shift+Left Double Click.
- The **Left Double Click** and **Right Double Click** options are not supported when enabling a Java-based application.

- The **Left Double Click** and **Right Double Click** options are registered as two single mouse clicks when enabling certain Smart-Screen applications (i.e., WPF and Silverlight applications). To enable these applications, use the **Left Click** or **Right Click** options.
7. Click **OK**.
  8. If you want to use the **Tab** keyboard key to scrape values from the enabled screen, select the **Use tabbing for scraping keywords** check box.
  9. Click **OK**.

---

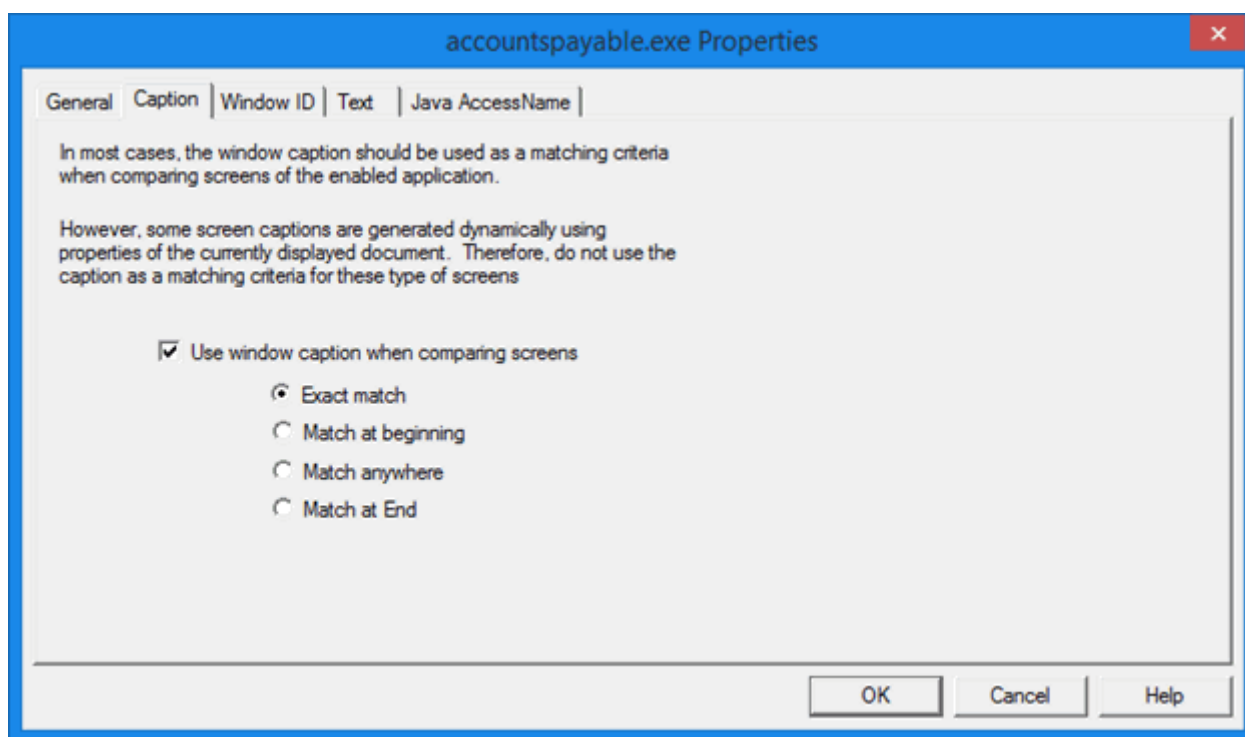
**Note:** Mouse/keyboard events can be changed after configuration by opening an existing configuration, selecting an application, clicking **Configure**, selecting a context, and clicking **Edit**.

---

## Caption

You can use the combination of Window ID and Caption to identify a screen. If both are selected, a screen must meet all of the criteria in order to be identified by Application Enabler.

You can identify a screen by its caption using the **Caption** tab:



The **Use window caption when comparing screens** option is selected by default. This is generally used when no Window ID exists. To identify the screen only by its caption:

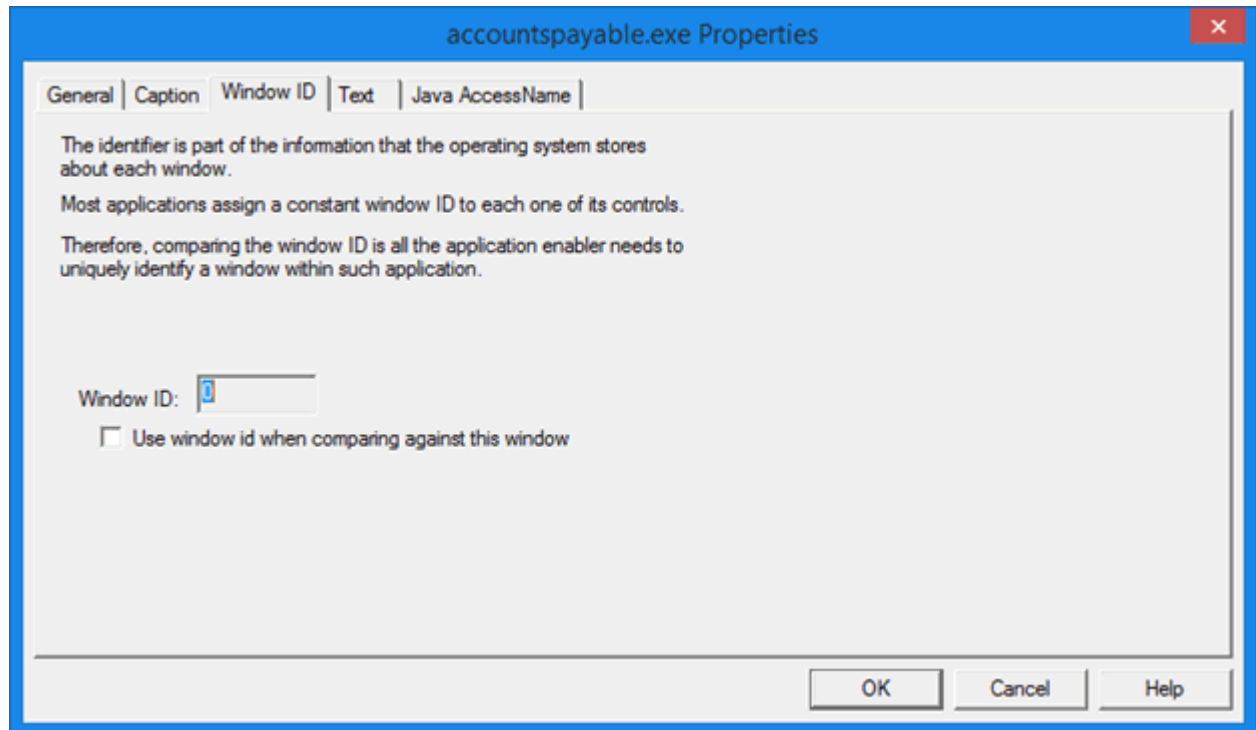
1. Clear **Use window id when comparing against this window** on the **Window ID** tab.
2. On the **Caption** tab, select the **Use window caption when comparing screens** check box and select one of the following options:

Options	Description
<b>Exact match</b>	The caption of a screen must exactly match the caption entered at the time of configuration.
<b>Match at beginning</b>	The caption of a screen must match the beginning of the caption entered at the time of configuration.
<b>Match anywhere</b>	The caption of a screen must match the caption entered at the time of configuration anywhere in the caption.
<b>Match at End</b>	The caption of a screen must match the end of the caption entered at the time of configuration.

3. Click **OK**.

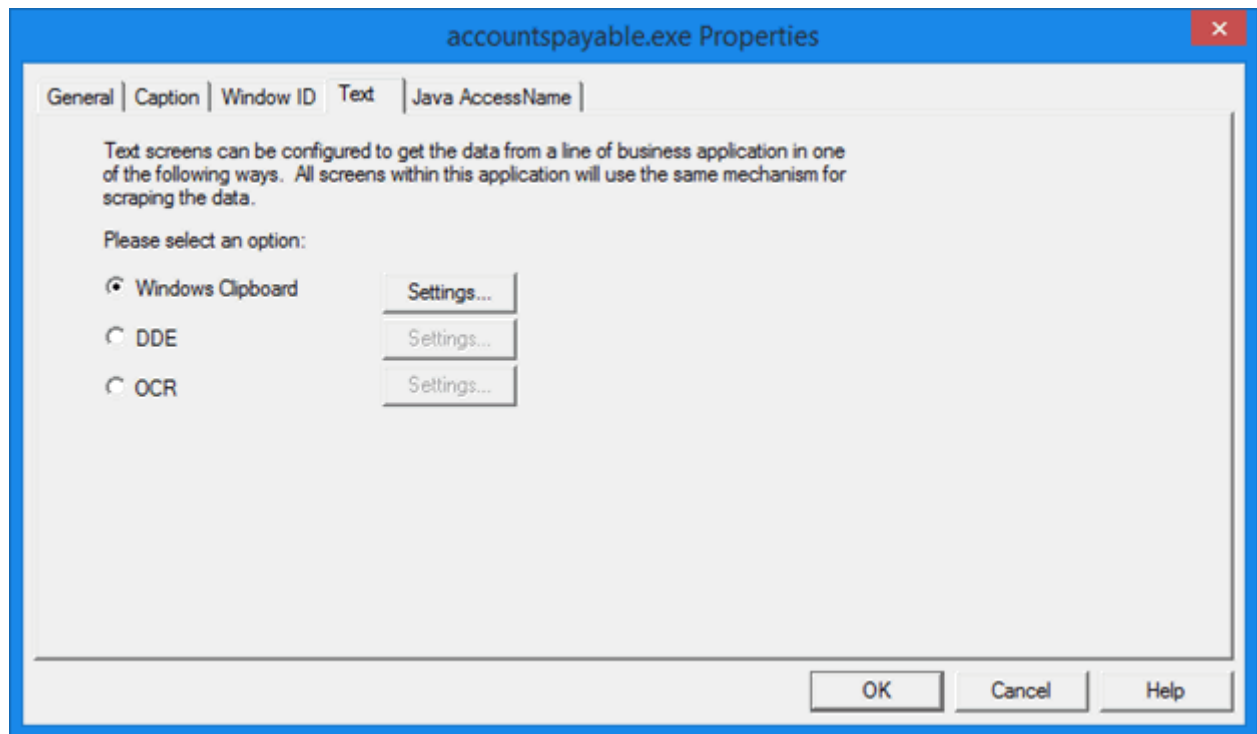
## Window ID

Application Enabler Configuration uses the Window ID as the identification of a screen. The **Use window id when comparing against this window** option must be selected on the **Window ID** tab:



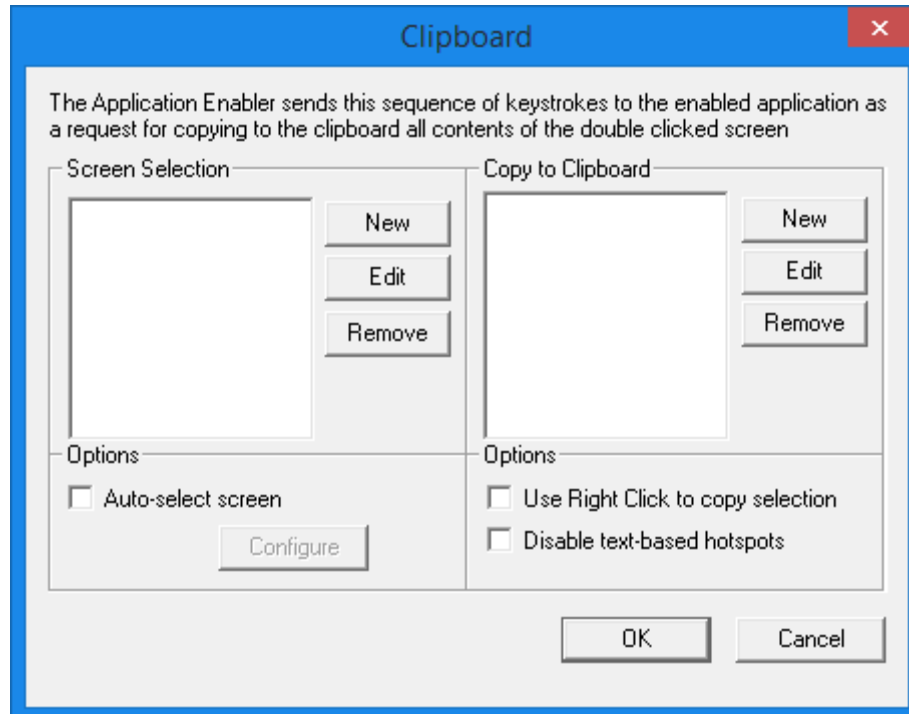
## Text

The **Text** tab is used to configure text screens.



Application Enabler supports three methods for scraping text screens. Select one of the buttons described in the following sections and click the corresponding **Settings** button to configure additional settings.

## Windows Clipboard



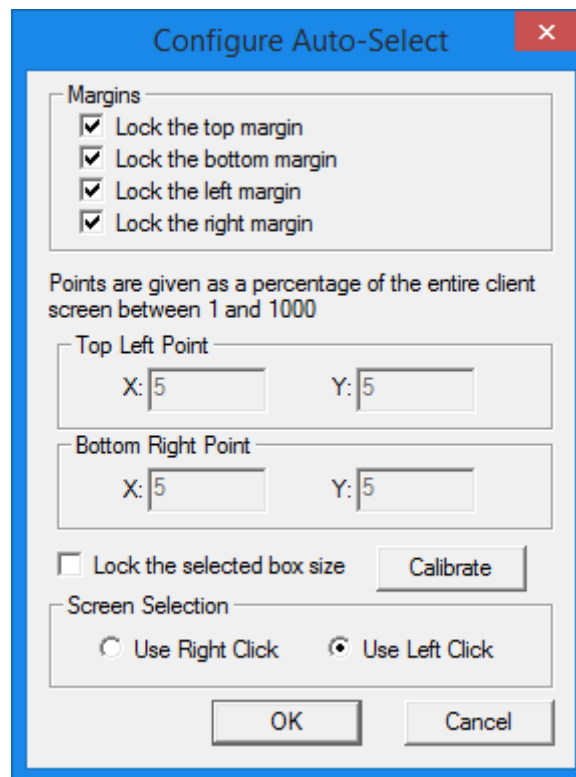
Application Enabler identifies text-based screens and screen data by the line and column location of characters on the text screen. In order to accurately map characters, Application Enabler copies each configured text screen to the Windows clipboard. The **Windows Clipboard** setting allows you to define which keystrokes are used to select a screen and copy it to the clipboard. In most cases, text-based applications will enable when the standard **CTRL + A** (select all) and **CTRL + C** (copy all) are used. Some applications may require alternate keystroke combinations.

1. Click **New**.
2. Enter the keystroke combination in the text field.
3. Click **OK**.



Some applications require automatic selection of the screen to copy text to the clipboard. In this case, select **Auto-select screen**. When this option is selected, the **Configure** button is enabled. To configure the **Auto-select screen** option:

1. Click **Configure**. The **Configure Auto-Select** dialog box is displayed.



2. Select **Lock the top margin** to keep the top margin the same size (in pixels) no matter how the client window is resized.
3. Select **Lock the bottom margin** to keep the bottom margin the same size (in pixels) no matter how the client window is resized.
4. Select **Lock the left margin** to keep the left margin the same size (in pixels) no matter how the client window is resized.
5. Select **Lock the right margin** to keep the right margin the same size (in pixels) no matter how the client window is resized.
6. Select **Lock the selected box size** to keep the box that was selected in the client screen stay the same size no matter how the client window is resized. This option can be used along with the **Lock the top margin** and **Lock the left margin** options to keep the selected area in the same place no matter how the client area is resized.
7. If you want to specify the area of an application that should be auto-selected, click **Calibrate**. This option should only be used for applications that have auto-selection enabled.

8. If you want to use the right mouse button to select the screen, select **Use Right Click**. If you want to use the left mouse button to select the screen, select **Use Left Click**.
9. On the line of business application, click and drag the mouse pointer across the client area that you want to be auto-selected. Coordinates will be populated in the point fields.

As check boxes are checked and unchecked the edit boxes for the initial and ending points become enabled. These values can be edited manually. These values are based on a percentage of the screen out of 1000.

---

**Note:** If the box is not enabled the value inside the box is not restricted to a percentage.

---

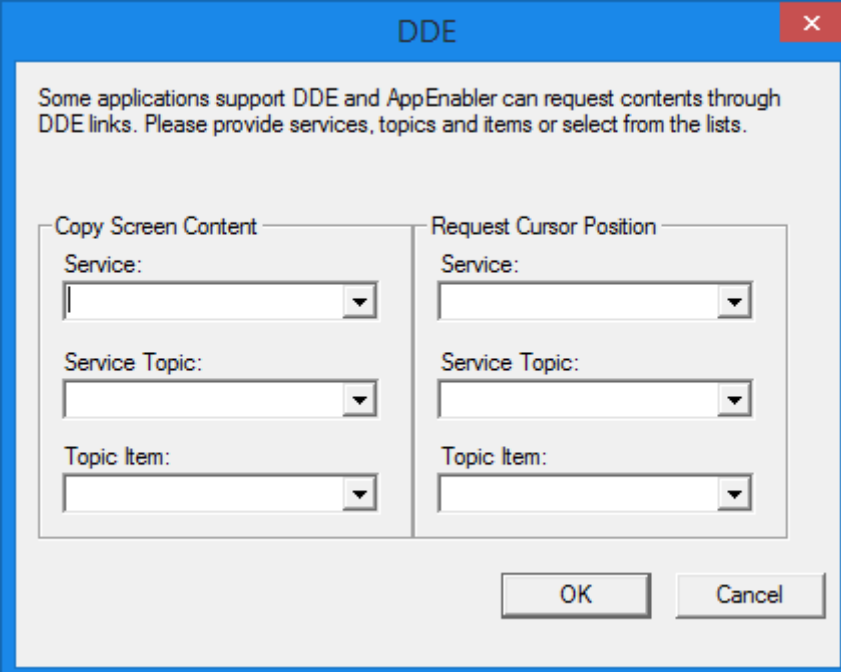
If locks are changed while in the auto-select dialog the calibrate button must be used to select the box in the client screen.

Some applications may require that you right-click to copy to the clipboard. In this case, select **Use Right Click to copy selection** to automatically trigger the right-click action when a screen is selected.

If the **Disable text-based hotspots** option is selected, scraping from text screens will be faster. It will also disable hotspots as well. This setting should be used whenever a text-based application does not require using hotspots. This option is disabled by default.

Click **OK** when you have completed configuration.

## DDE



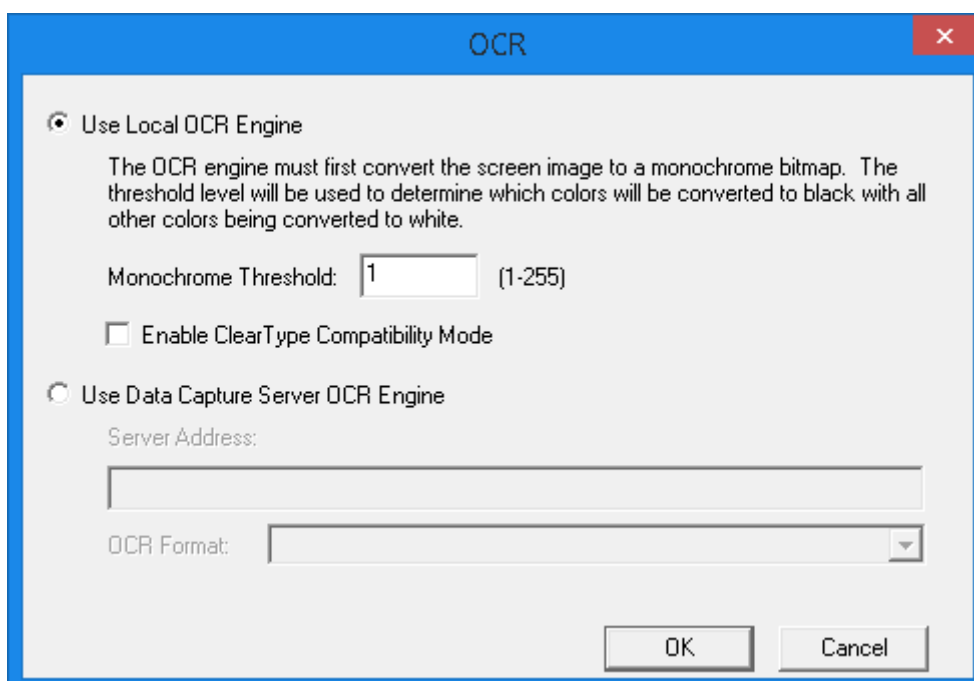
The screenshot shows a dialog box titled "DDE" with a blue header bar and a red close button. The main area has a light gray background and contains the following text: "Some applications support DDE and AppEnabler can request contents through DDE links. Please provide services, topics and items or select from the lists." Below this text are two columns of settings. The left column is titled "Copy Screen Content" and the right column is titled "Request Cursor Position". Each column contains three dropdown menus labeled "Service:", "Service Topic:", and "Topic Item:". At the bottom right of the dialog are "OK" and "Cancel" buttons.

The **DDE** setting should be used for text-based applications that do not communicate with the clipboard. DDE is the preferred method to use with text-based applications. DDE should be used and only if this fails should the clipboard method be used. In order to configure the DDE tab, you need to know the **Service**, **Service Topic**, and **Topic Item** for screen contents and cursor positions. These may be listed in the drop-down lists; otherwise, check server references and input manually.

Another use for the DDE setting is if you want to configure multiple hotspots on a text-based application that could potentially have the same value. Without the use of the DDE setting, the first instance of the value scraped would be used. Using the DDE option can help identify where on the screen the value was scraped from.

Click **OK** when you have completed configuration.

## OCR



The OCR configuration dialog box has a blue title bar with the text "OCR" and a red close button. It contains two radio button options. The first option, "Use Local OCR Engine", is selected. Below it is a text box for "Monochrome Threshold" with the value "1" and a range "(1-255)". There is also an unchecked checkbox for "Enable ClearType Compatibility Mode". The second option, "Use Data Capture Server OCR Engine", is not selected. Below it is a text box for "Server Address:" and a dropdown menu for "OCR Format:". At the bottom right are "OK" and "Cancel" buttons.

OCR

☒ Use Local OCR Engine

The OCR engine must first convert the screen image to a monochrome bitmap. The threshold level will be used to determine which colors will be converted to black with all other colors being converted to white.

Monochrome Threshold:  (1-255)

☐ Enable ClearType Compatibility Mode

☐ Use Data Capture Server OCR Engine

Server Address:

OCR Format:

OK Cancel

The **OCR** setting must be used if you are configuring Application Enabler to use OCR with this application.

1. Select which OCR engine should be used.
  - To use the native OCR engine, select **Use Local OCR Engine**.
  - To use the Data Capture Server OCR engine, select **Use Data Capture Server OCR Engine**.

---

**Note:** Select **Enable ClearType Compatibility Mode** or use the Data Capture Server OCR engine if the application you are enabling uses ClearType fonts.

---

**Note:** Additional licensing and configuration is required in order to use the Data Capture Server for OCR processing. See [Data Capture Server on page 326](#) for information.

---

2. If you selected **Use Local OCR Engine**, configure the **Monochrome Threshold** value, if necessary. The Monochrome Threshold value is internally used by the local OCR engine. For most applications, the default value of **1** will be sufficient. Modify this value only when the default value does not work for the screens in your application.
3. If you selected **Use Local OCR Engine**, and the application you are enabling uses ClearType fonts, select **Enable ClearType Compatibility Mode**.
4. If you selected **Use Data Capture Server OCR Engine**, configure the following settings:
  - **Server Address** - Enter the server address for the Data Capture Server. The server address must be the net.tcp address to the Data Capture Server, for example:  
`net.tcp://localhost:9050/Hyland.DataCapture.ServiceManager/service`
  - **OCR Format** - Select the OCR format to be used.

---

**Note:** For information on configuring OCR formats, refer to the **Full-Page OCR** module reference guide.

---

5. Click **OK** when you have completed configuration.

## Save and Close

Save the configuration by clicking **Save**. After saving the current configuration, Application Enabler Configuration automatically performs a health check of the configuration file. This health check helps identify configurations that may be invalid.

For example, if you configure a retrieval or indexing context but do not configure a Document Type, you will be prompted that your configuration may be invalid.

Any health check warnings that are presented are saved to a text file in the same location as the XML configuration file. This file is named **[name of XML configuration file].xml.warning.txt**.

Be sure that the directory that you save the configuration file in is available to all users that will need to use Application Enabler in conjunction with the enabled application. Click **Save**.

---

**Note:** A single Application Enabler configuration file is limited to 30 enabled applications.

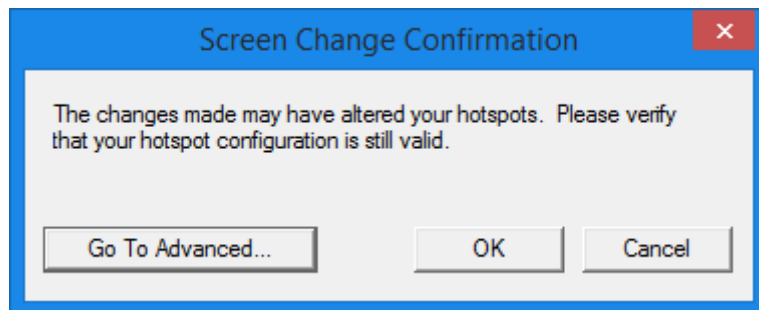
---

## Opening Existing Configurations

Refresh Application Enabler by closing and restarting the application. Open the configuration file by selecting **Load Configuration** in Application Enabler. Enable the event capturing process and test your configuration to ensure that it retrieves the desired documents.

## Editing Existing Configurations

When you change an existing configuration file, changes made may affect existing hotspot configuration. When a configuration change may have affected a hotspot configuration, the following dialog box is displayed.



Click **OK** to continue with the configuration.

Click **Go To Advanced** to go to the **Hotspots Configuration** dialog box to confirm the configuration changes are correct.

Click **Cancel**, to cancel your changes.

## Enabling Text-Based Applications

### Configuration Overview for Text-Based Applications

The configuration process creates links between line-of-business application data and the document management system keyword types. In order to create these links, do the following. A detailed description of each step is included in this manual.

1. Open the line-of-business application to enable. See [Open the Line-of-Business Application on page 128](#).
2. Create links between line-of-business application fields and OnBase Document Types and Keyword Types. See [Create Links Between Line-of-Business Application Screens/Fields and System Keywords on page 128](#).
  - Create a new text screen configuration.
  - Identify the text screen to enable.
  - Define the screen name identification string.
  - If no **Name** is displayed on the **General** section, click **View Window Info Tree** and find the 'parent' of the control you are going to use. See [View Window Info Tree on page 131](#) for more information.

- If necessary, adjust the mapping rules that Application Enabler will use to uniquely identify keywords on the line-of-business screen, with options provided after clicking **Configure Mapping Rules**.
  - If OCR should be used to identify text on the text screen, press **View OCR text**. For more information, see [Enabling Applications Using OCR on page 274](#).
3. Log on OnBase. You have access to only those documents for which you have been granted rights. See [Logging on to OnBase on page 132](#).
    - Select the Document Types to be retrieved. See [Select Document Types on page 133](#).
  4. Establish a link between the OnBase Keyword Types, Unity Form fields, or WorkView attributes to a location on the line-of-business application screen. See [Associating Keyword Types, Unity Form Fields, or WorkView Attributes on page 134](#).
    - Click **Settings** to access formatting options. Select the appropriate stripping options to eliminate unwanted characters or spaces. Appropriate formatting options are available for date or currency. See [Settings on page 143](#).

---

**Note:** The formatting options on the **Strip**, **Parse**, and **Append** tabs can work in conjunction with one another. Formatting options are applied sequentially, such that options on the **Strip** tab are applied first, followed by options on the **Parse** tab, and then by options on the **Append** tab. Options on these tabs are also applied sequentially, from the top of the tab to the bottom of the tab.

---

- Configure the Copy to Clipboard keystrokes.
5. Configure properties. See [Properties Dialog Box on page 152](#).
  6. Save your configuration. See [Save and Close on page 162](#).
  7. Optionally, configure hotspots. See [Configuring Hotspots on page 277](#).

## Step by Step Configuration

### Open the Line-of-Business Application

Open the text-based line-of-business application you want to enable. An example application is shown below:

```

Sign On

System . . . . . DTP400
Subsystem . . . . . QINTER
Display . . . . . QPADEV0007

Name . . . . .
Loan Number . . . . .
Check Number . . . . .
Account Number. . . . .

Attachmate Corporation
AS/400 300 V3R1M0

AS/400 Assistance and Support
Please call x9999 or 999-9999
Evening/weekends: 111-1111

```

### Create Links Between Line-of-Business Application Screens/Fields and System Keywords

In order to enable a text-based application:

1. Identify each line-of-business application screen to enable. A line-of-business application screen is a single window of information. Line-of-business applications can have many screens. You can enable one or many screens.
2. Identify each line-of-business application field to enable. Line-of-business application screens can contain configurable fields, non-configurable text, and other components.

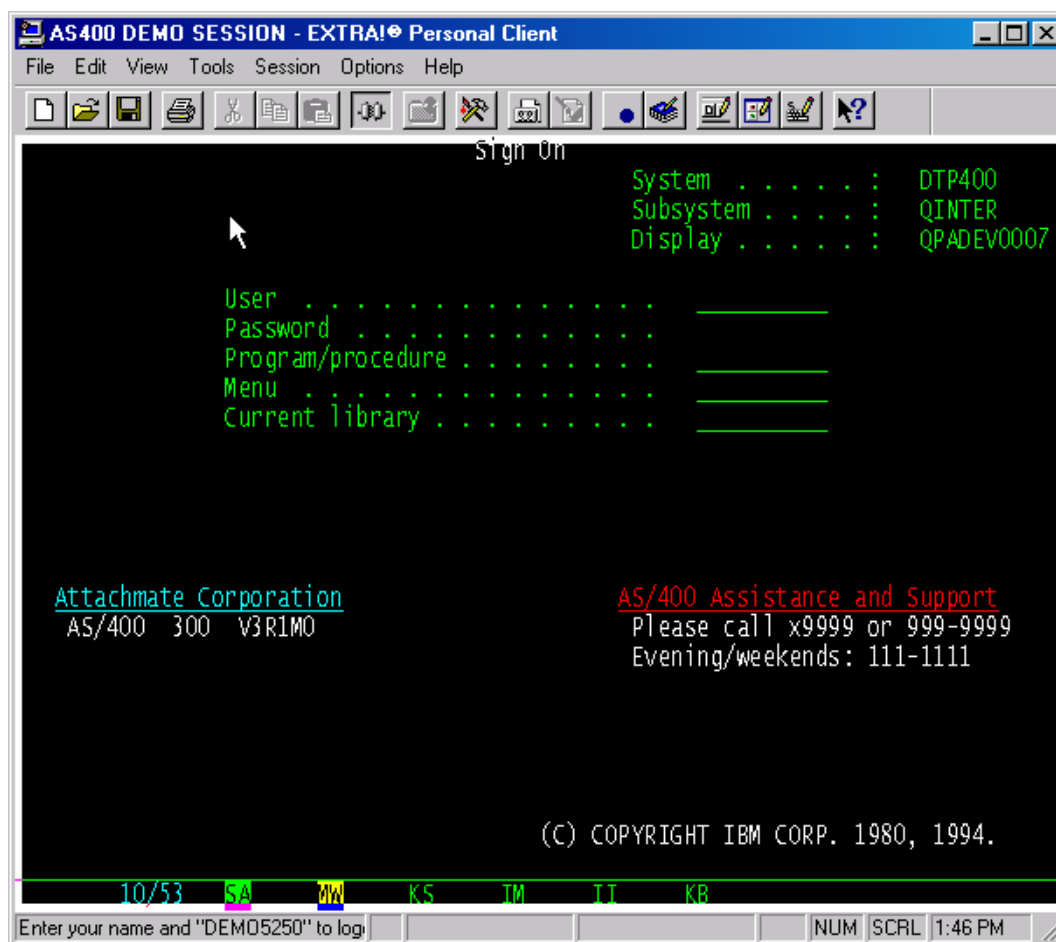
### Create a New Text Configuration

Open your line-of-business application and ensure that the screen you wish to enable is visible and can be selected with a single mouse click.

To begin enabling an application:

1. In Application Enabler Configuration, click **New Text-Screen** or the **Configure a new Text screen** toolbar button.
2. Application Enabler Configuration prepares to capture the first screen you wish to enable.

- As you move the mouse, areas of your screen are highlighted by a selection box, which encloses the area selected for capture. Place your mouse over the line-of-business application you wish to enable. Move your mouse until the selection box encloses the entire line-of-business application screen and left-click to select it. In the following example, the selection box appears as a white line around the application.

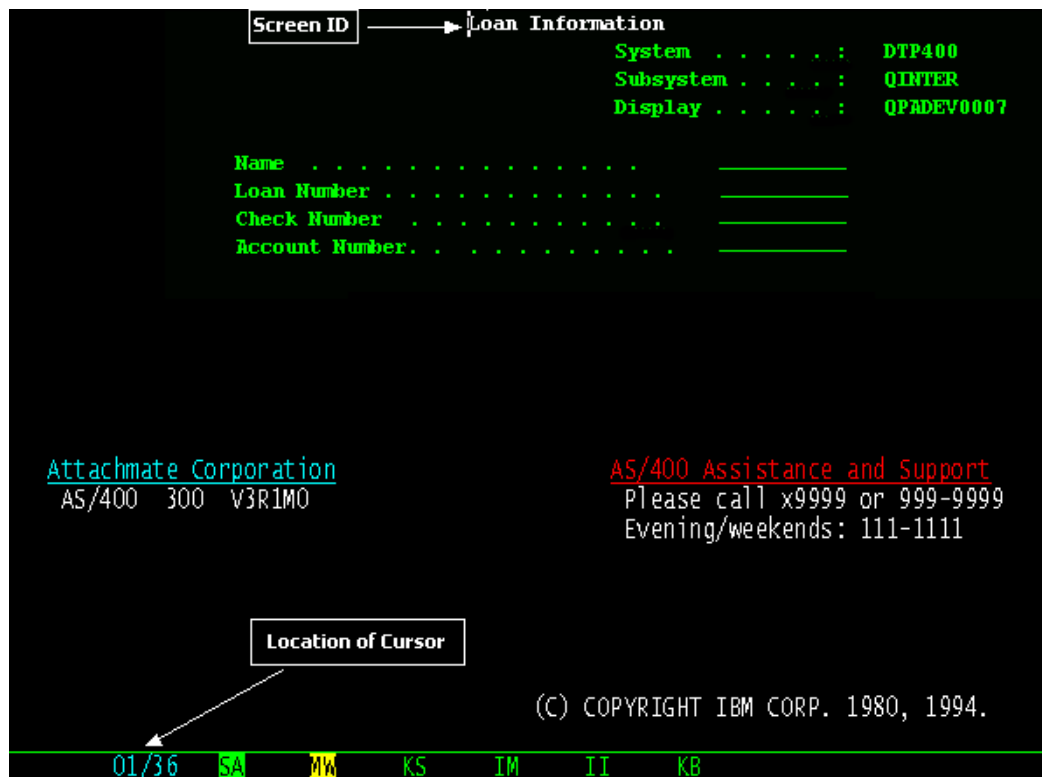


## Screen Name Identification String

Choose a unique text string as a screen identifier. Application Enabler Configuration will distinguish each screen by the value you provide. Identify the screen by locating a unique text string. In the example below, **Loan Information** is a unique text string located on line one, column 36. This sample application identifies the current location of your cursor by line and column coordinates shown at the bottom of the screen.



Confirm that the status line information is accurate by manually cutting and pasting the screen contents to a text editor. If the line and column locations do not match, use the text editor location information.



To identify the screen:

1. In the **Configure Text-based Screen** dialog box, enter the screen name in the **Name** field. This name will be used to identify the screen in the initial Application Enabler Configuration screen. In some cases the line-of-business application name may not appear as you wish automatically. Rename the screen by replacing the default name provided in the **Name** field. If no name is displayed on the **General** section, press **View Window Info Tree** and find the 'parent' of the control you are going to use. For further information, see [View Window Info Tree on page 131](#).
2. Enter the caption name in the **Caption** field.

---

**Caution:** If you change the text in the **Caption** field and you are using the caption to identify the screen, the screen may not be identified correctly for your configuration. If this occurs, you must reconfigure the enabled application to reflect the changed caption text.

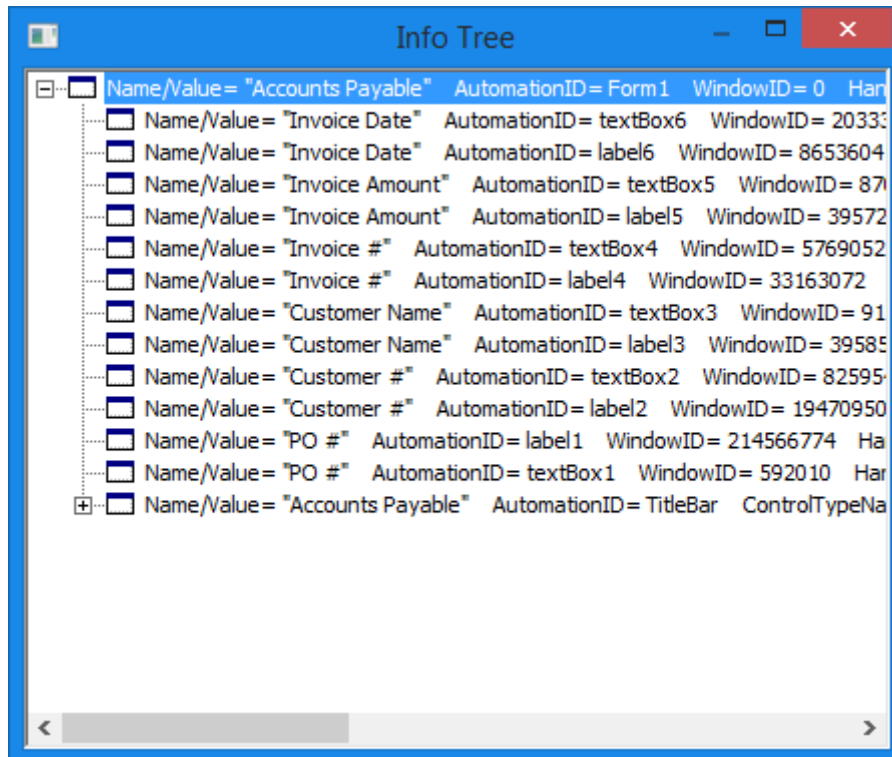
---

3. If OCR should be used to identify text on the text screen, press **View OCR text**. For more information, see [Enabling Applications Using OCR on page 274](#).
4. Click **New**.
5. In the **Input Screen Identification String** dialog box, enter the **Row** number, **Column** number, and **Value** contained in the string.
6. Click **OK**.

7. Repeat the above steps to add as many text strings as necessary to uniquely identify this screen.
8. When you are finished adding strings, click **Next**.

## View Window Info Tree

Clicking **View Window Info Tree** in the **Settings** dialog box opens the **Info Tree** dialog box:



This dialog box contains the following information for the application and the application's fields:

- Caption/Value
- Window ID
- Window Handle
- Class Name

This information can be helpful during configuration. This dialog box allows you to identify the parent window, a sub window, or field. To identify any parent, window, or field, right-click on any item and select **Highlight**.

In addition, you can right-click on the window and select **Search** to search. For Smart-Screen, Windows-based, text-based, HTML-based, and Dynamics GP-based applications, the Caption/Value item will be searched. For Java-based applications, Value, AccessName, and AccessDescription will be searched.

You can also right-click on the window and select **Save As** to save the data in the **Info Tree** dialog box to a text file.

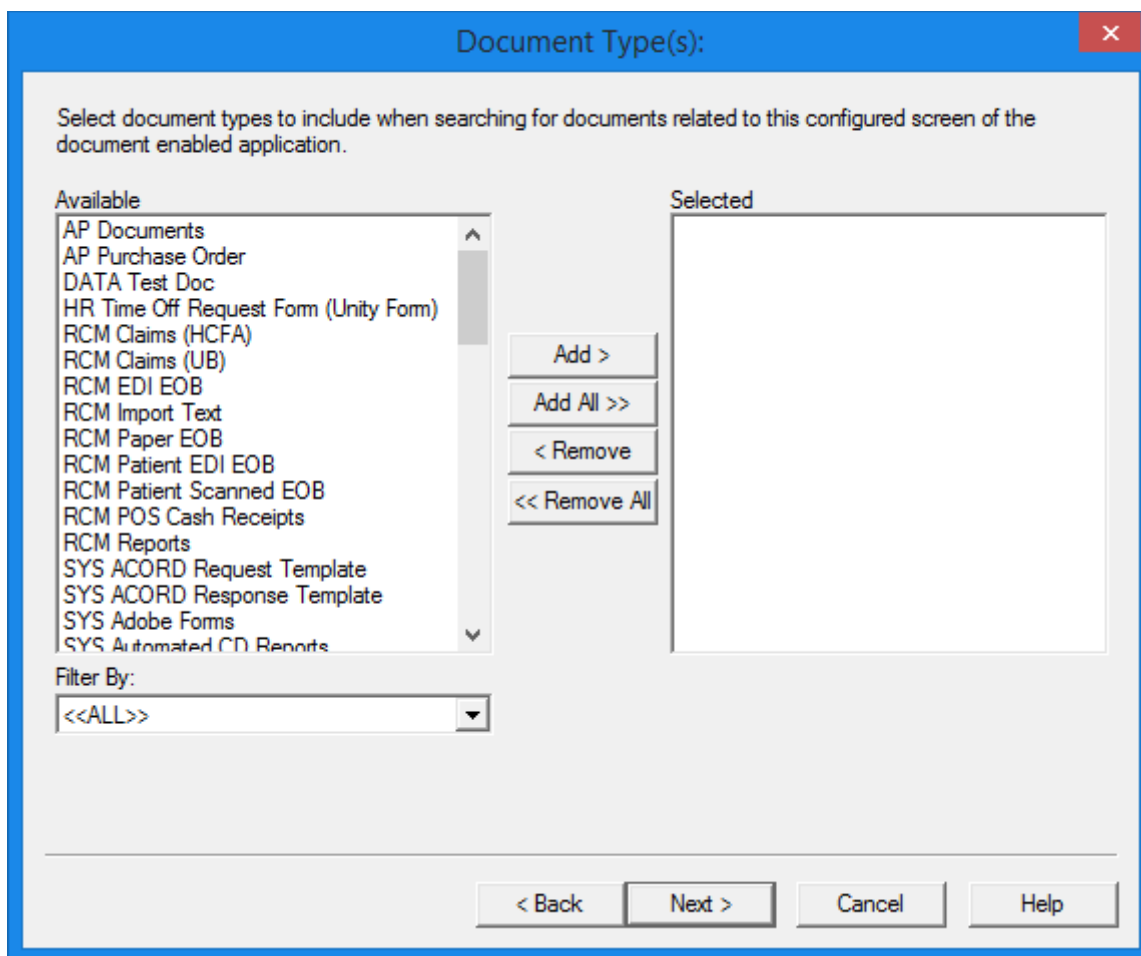
## Logging on to OnBase

If you are not currently connected to OnBase, a window opens and prompts you to log on.

1. Select the appropriate data source from the drop-down list. This drop-down list is only displayed when multiple data sources are available.
2. Type your OnBase user name.
3. Type your OnBase password.
4. Click **Login** to log on, or click **Cancel** to close the dialog without logging on.

## Select Document Types

The **Document Type(s)** dialog box is displayed:



1. Select the Document Types to search when retrieving OnBase documents through the line-of-business application. If you want to display all documents related to a screen, select all the Document Types that a user could possibly need from this screen. If you want to display only documents most relevant to a screen, select only the Document Types that most closely relate to the screen. Cross-referencing can be used to find other less closely related documents. Hold down the **Ctrl** key while selecting Document Types to select multiple Document Types that are not consecutively listed. Hold down the **Shift** key while selecting Document Types to select multiple Document Types that are consecutively listed.

---

**Note:** A Document Type is not required if you are configuring Healthcare Module Keyword Types or WorkView attributes.

---

2. Select one or multiple (using the Ctrl or Shift keys) Document Types from the **Available** list and click **Add** to add them to the **Selected** list. To add all Document Types, click **Add All**.  
To remove one or multiple (using the Ctrl or Shift keys) Document Types from the **Selected** list, select the Document Type(s) and click **Remove**. To remove all Document Types, click **Remove All**.
3. To filter available Document Types by Document Type Group, select a Document Type Group from the **Filter By** drop-down list.
4. Click **Next** to continue.

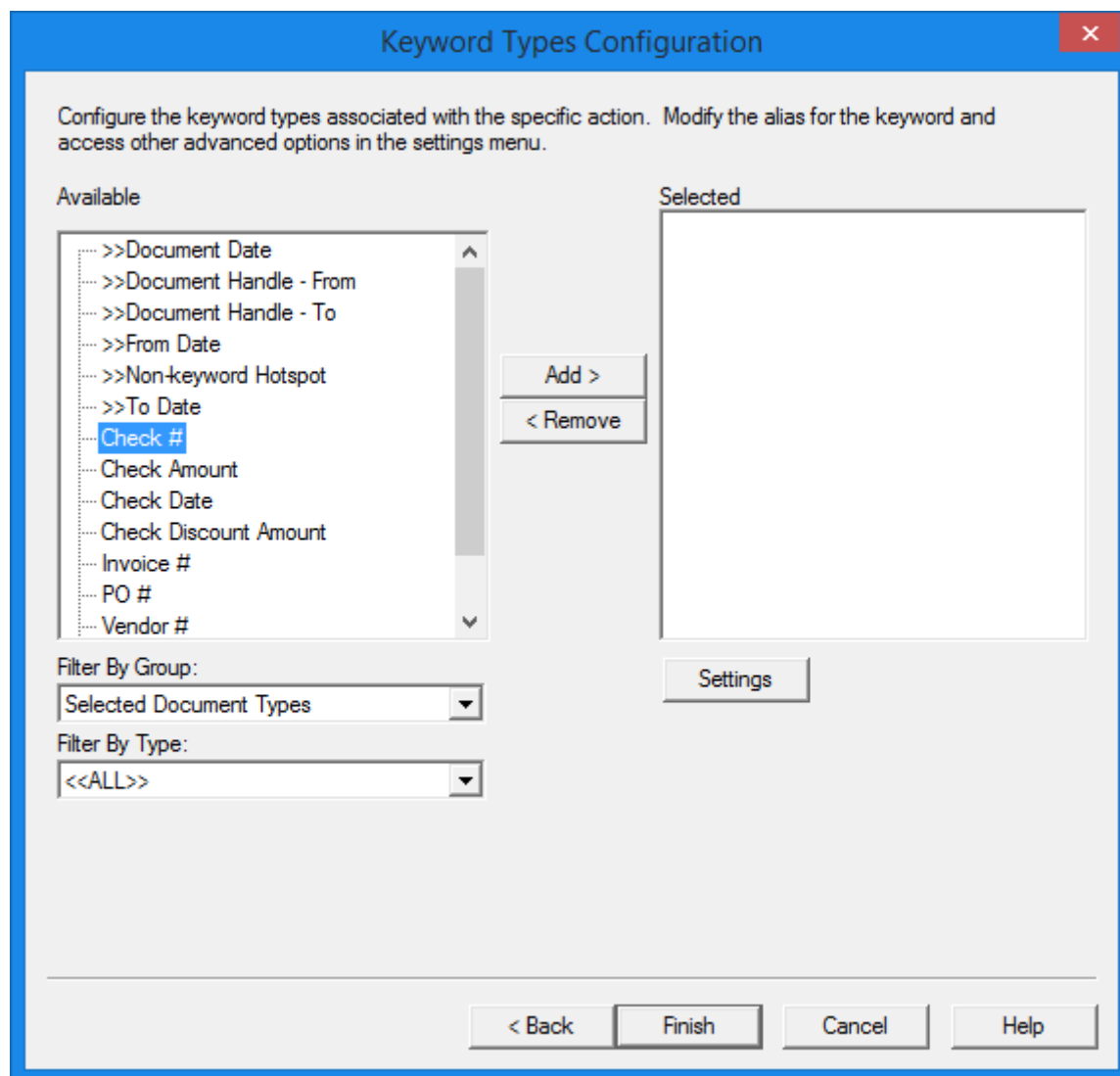
## Associating Keyword Types, Unity Form Fields, or WorkView Attributes

---

**Caution:** Specific Currency Keyword Types are not currently supported for use with Application Enabler.

---

After selecting Document Types, the **Keyword Types Configuration** dialog box is displayed.



This screen allows you to associate Keyword Types, Unity Form fields, or WorkView attributes with the configured screen.

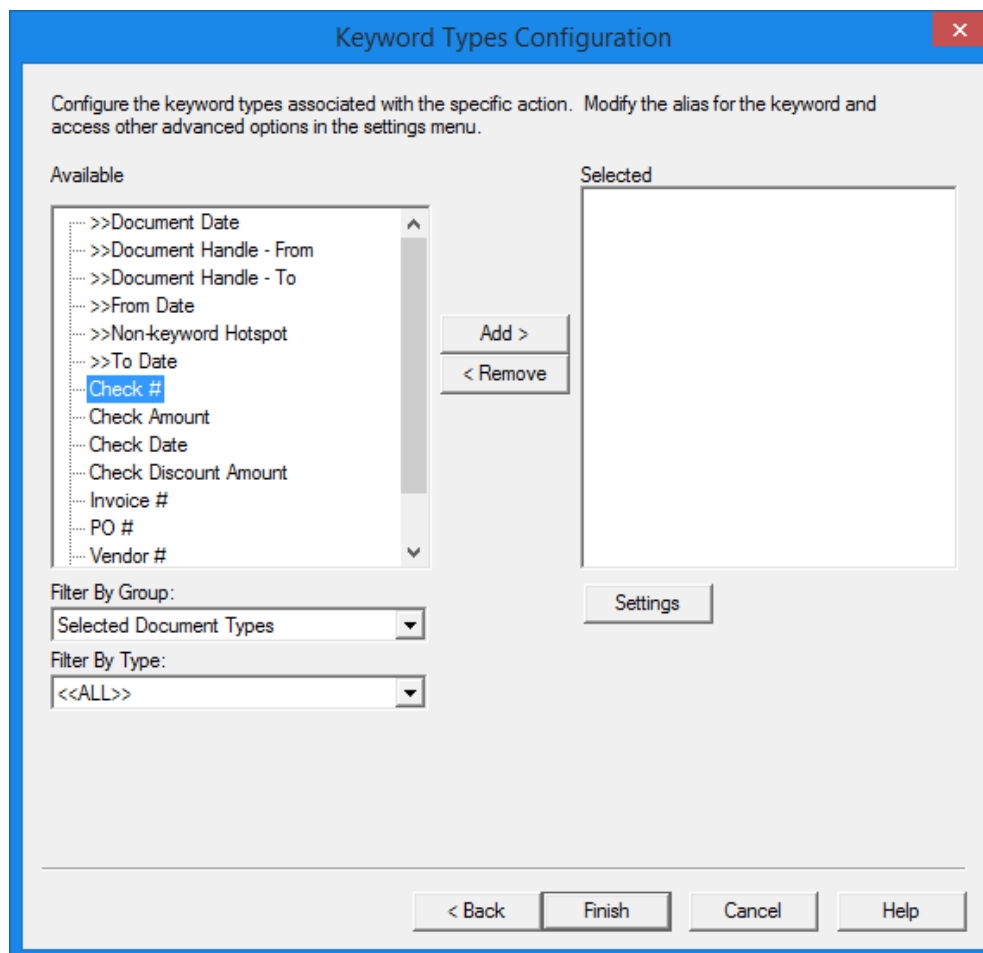
You can filter the **Available** list using the **Filter By Group** and **Filter By Type** drop-down lists. These two drop-down lists work together to narrow down the items that are displayed for easy selection and configuration. The **Filter By Group** drop-down list includes the following:

Filter By Group	Description
<b>Combined View Types</b>	When selected, the <b>Available</b> list displays any Combined View Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen. The <b>Filter By Type</b> drop-down list contains the available Combined View Types.

Filter By Group	Description
<b>Government Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase government module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the <b>Plan Review</b> selection, which is for the Electronic Plan Review module.</p>
<b>Healthcare Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase healthcare module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the following OnBase healthcare modules:</p> <ul style="list-style-type: none"> <li>• DeficiencyPop</li> <li>• RAC Audit</li> <li>• Patient Window</li> </ul> <hr/> <p><b>Note:</b> The ChartPop, DeficiencyPop, and LongitudinalPop options are maintained for legacy purposes only. For new medical deployments, please use the OnBase Patient Window.</p> <hr/>
<b>Selected Document Types</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen.</p> <p>The <b>Filter By Type</b> drop-down list contains the Document Types that were selected on the <b>Document Type(s):</b> screen.</p>
<b>Unity Form Templates</b>	<p>When selected, the <b>Available</b> list displays any Unity Form fields associated with the Unity Form template selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of Unity Form templates.</p>
<b>Workview App</b>	<p>When selected, the <b>Available</b> list displays any WorkView attributes associated with the WorkView class that is selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of WorkView classes.</p> <hr/> <p><b>Note:</b> The following WorkView attribute Data Types are not supported for use with Application Enabler, and are not displayed during configuration: Text, Formatted Text, Document, Date/Time. External classes are not supported for use with Application Enabler. Multiple level relationships (for example, AssignedEmployee.Manager.FullName) are also not supported.</p> <hr/>

1. If you are configuring a Keyword Type, select the Keyword Type in the **Available** list and click **Add**.

Keyword Types that are mapped to system properties are available for configuration. See >>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date on page 141 for more information.



If you are configuring a Unity Form, select Unity Form fields in the **Available** list and click **Add**.

If you are configuring a WorkView attribute, select the attribute in the **Available** list and click **Add**. Nested attributes are displayed with a + symbol.



- To configure additional options, select an item in the **Selected** list and click **Settings**. The **Keyword Settings** dialog box is displayed.

Settings:AP PO#

General | Strip | Parse | Append

**Location & Size**

☐ Read rows from the bottom to the top

☒ Location is based on Row and Column

Row: 0 Column: 0 Width: 0

☐ Location is relative to a Tag

Tag value: ☐ Tag is a regular expression

Tag occurrence: 0

Row Offset: 0 Column Offset: 0 Width: 0

**OCR**

View OCR text Test Keyword

**Required Keyword**

☐ Keyword is required

Warning Level: Warn and continue

OK Cancel Help

- By default, Application Enabler reads the rows on the screen from the top to the bottom to locate the keyword value. To reverse this behavior and have the rows on the screen read from the bottom to the top, select **Read rows from the bottom to the top**.
- Select one of the following options:
  - Location is based on Row and Column**  
To set the precise location of the keyword value on the line-of-business application screen based on the row, column, and width of the keyword value, select this option.

- **Location is relative to a Tag**

To set the location of the keyword value on the line-of-business screen based on a tag value, select this option. You can specify a text string or a valid regular expression for locating keyword values. This option allows for greater flexibility when keyword data may not be located in a consistent row or column.

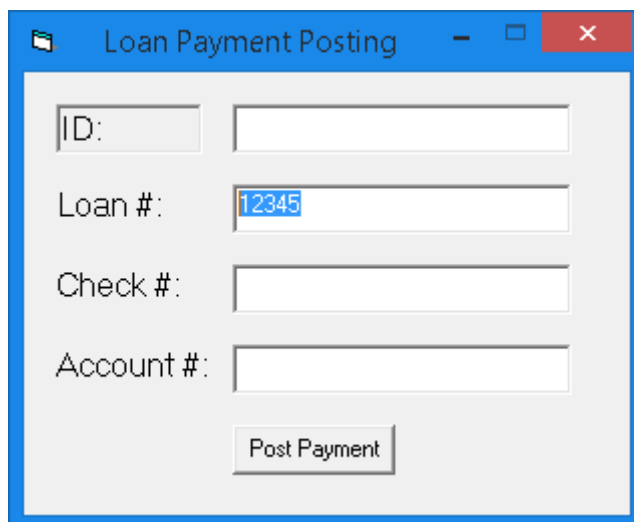
---

**Note:** The **Location is relative to a Tag** option can only be used with text screens that use Copy to Clipboard or OCR functionality.

---

5. If you selected **Location is based on Row and Column**, identify the **Row** and **Column** location of the keyword on the line-of-business application screen. Enter the maximum **Width** of the Keyword Value. The width can be longer than the value as long as it does not overlap any other text.
6. If you selected **Location is relative to a Tag**, specify the following:
  - a. Specify the **Tag value**. The tag value is the area on the line-of-business screen in which a tag—a text string or regular expression that always precedes a keyword value—can always be found. This value is case-sensitive.  
If the tag value is a regular expression, select the **Tag is a regular expression** check box.
  - b. Specify the **Tag occurrence**. If the tag value appears on the screen more than once, specify which occurrence of the tag value to use.
  - c. If necessary, specify the **Row Offset** and **Column Offset**. The row and column offset determine where the keyword value is located in relation to the tag value. These values can be between -500 and 500. For example, a Row Offset and Column Offset of 0 would indicate that the keyword value is on the same row as the tag value, and the keyword value begins immediately following the tag value.
  - d. Enter the maximum **Width** of the keyword value. The width begins in the column immediately following the tag value. The width can be longer than the value as long as it does not overlap any other text. Any leading spaces are automatically stripped from the keyword value.

7. If you are using OCR, click **View OCR text** to view the text recognized by the OCR engine. For example, when configuring OCR for the following screen:



Loan Payment Posting

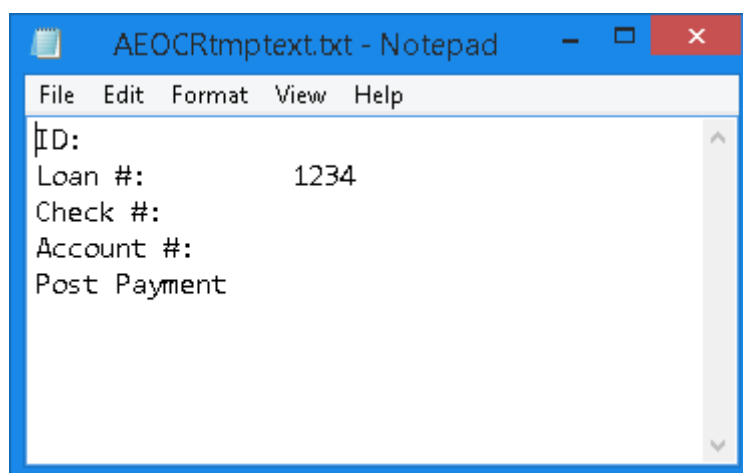
ID:

Loan #:

Check #:

Account #:

The following results are displayed:



Close the OCR results text file and continue configuring the application.

8. If you are using OCR, click **Test Keyword** to display the text scraped from the location and size coordinates in step 5 or 6, depending on which step you followed.

---

**Note:** The text displayed in the field above the **Test Keyword** button does not respect settings configured on the **Strip**, **Parse**, or **Append** tabs. Settings configured on the **Strip**, **Parse**, or **Append** tabs will still be applied to scrape events at run time.

---

9. The **General** tab also allows you to set a Keyword Type as a required keyword by selecting the **Required keyword** check box. See [Setting a Keyword as Required on page 143](#) for more information.

---

**Note:** You can also set the options for stripping, parsing and appending in the Keyword Settings dialog box. See [Settings on page 143](#) for more information.

---

10. Click **OK**.

---

**Note:** Multiple screen locations can be mapped to a single Keyword Type. To map another screen location to a Keyword Type, repeat the above steps for the new associated location. When a new location is associated with a keyword that already is mapped to a screen location, the keyword name is followed by an incremental number in parenthesis, used to distinguish between the different mapped screen locations. Example: The second mapping of the Vendor Name Keyword Type to a screen location results in a Keyword Type name of Vendor Name (01). The third mapping results in a Keyword Type name of Vendor Name (02).

---



---

**Note:** WorkView attributes, Unity Form fields, and module-specific Keyword Types can only be mapped to a field once.

---

11. If you want to change required keyword or stripping settings, click **Settings**. See [Settings on page 143](#) for further information. If a Keyword Type is the date or currency data format, the appropriate tab will also be available. See [Currency and Date Keyword Formatting on page 149](#) for information on currency and date formatting.
12. Click **Next** to continue configuring.

**>>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date**

The **>>Document Date**, **>>Document Handle - From**, **>>Document Handle - To**, **>>From Date**, **>>Non-keyword Hotspot**, and **>>To Date** Keyword Type selections have distinct purposes.

Keyword Type	Description
<b>&gt;&gt;Document Date</b>	<p>Allows you to map to the Document Date of a document during indexing.</p> <hr/> <p><b>Note:</b> The <b>&gt;&gt;Document Date</b> Keyword Type is not respected by all Application Enabler contexts. For more information, see <a href="#">Using Contexts on page 288</a>.</p> <hr/>

Keyword Type	Description
>>Document Handle - From	<p>Allows you to map to the <b>From</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b>, and <b>Application Enabler - Retrieve in Workflow</b> contexts, or generate document packets with the <b>Application Enabler - Generate Document Packets</b> context.</p> <p>To retrieve using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Retrieve Documents</b> and <b>Application Enabler - Retrieve in Workflow</b> will only retrieve the single Document Handle that matches the scraped value.</p> <p>To generate a document packet using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Generate Document Packets</b> will only generate the packet for that single Document Handle that matches the scraped value.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - From Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/> <p><b>Note:</b> When using the &gt;&gt;Document Handle - From Keyword Type with the <b>Application Enabler - Retrieve in Workflow</b> context, all other keywords that are passed in will be ignored.</p> <hr/> <p><b>Note:</b> In order for document retrieval to function as expected when using the <b>Document Handle</b> system keyword, the <b>Retrieve by Document Handle / File Name</b> product right must be assigned to the user's user group in the OnBase Configuration module.</p> <hr/>
>>Document Handle - To	<p>Allows you to map to the <b>To</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b> context.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - To Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/>
>>From Date	<p>Allows you to map to the <b>From</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

Keyword Type	Description
>>Non-keyword Hotspot	Allows you to map a hotspot to any screen element without mapping the element to a Keyword Type. This will allow a screen scrape to be initiated from any element on the screen. For example, using this selection, the hotspot could be mapped to a button on the screen that is not associated with a Keyword Value.
>>To Date	<p>Allows you to map to the <b>To</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

## Settings

The **Settings** dialog box is opened by clicking the **Settings** button on the **Keyword Types Configuration** screen. Available settings are described in the following sections:

- [Setting a Keyword as Required on page 143](#)
- [Character Stripping on page 144](#)
- [Parsing on page 146](#)
- [Appending Prefixes and/or Suffixes to Scraped Keyword Values on page 148](#)
- [Currency Keyword Formatting on page 149](#)
- [Date Keyword Formatting on page 150](#)

### Setting a Keyword as Required

The **General** tab allows you to set a Keyword Type as a required keyword. To make a keyword required, select **Required keyword**. You can select either **Warn and continue** or **Warn and cancel** from the **Warning Level** drop-down list to determine if you want users to be able to continue a query that does not specify a value for a required keyword. You can also click **View Window Info Tree** to access the **Info Tree** dialog box. This dialog box can be used to identify fields to map to Keyword Types.

## Character Stripping

If you wish to retrieve documents based on a subset of characters within a value, you can configure Application Enabler to "strip" characters to exclude from the search using the **Strip** tab. For example, if a line-of-business application field contains a full phone number and you wish to retrieve OnBase documents based on area code, configure character stripping to remove all characters but the area code from the line-of-business application field.

Settings:AP PO#

General Strip Parse Append

Each strip option allows you to remove selected characters for the scraped value.  
Each option is applied in a top to bottom sequence.

☐ Strip spaces

☐ Strip any occurrences of string

String:

☐ Strip from beginning

Number of characters:

☐ Strip from end

Number of characters:

OK Cancel Help

The sequence of operation is from the top down. Application Enabler first strips spaces (if checked) then strips characters (if checked) and so on.

The following settings are available on the **Strip** tab:

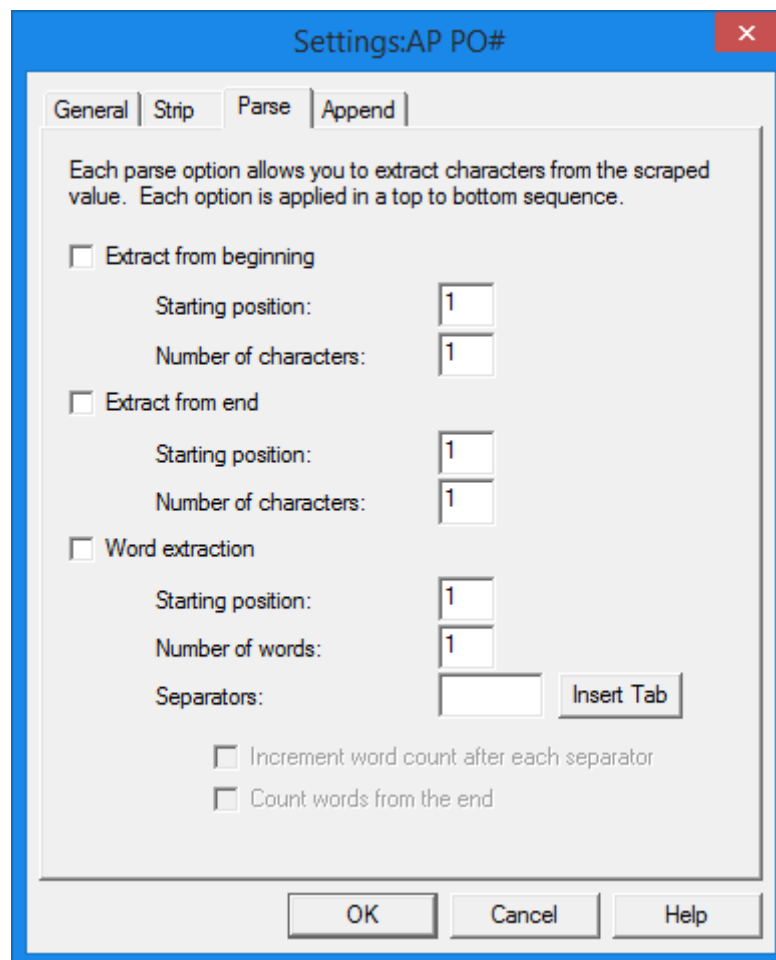
Setting	Description
<b>Strip spaces</b>	Select <b>Strip spaces</b> to remove all spaces from the line-of-business application value, regardless of the location of the spaces. For example, if <b>Strip spaces</b> is selected, double-clicking on a properly configured line-of-business application field containing <b>2_2__16_44__</b> (where _ represents a space) will return OnBase documents with the Keyword Value <b>221644</b> .
<b>Strip any occurrences of string</b>	Select <b>Strip any occurrences of string</b> to strip all occurrences of a specific character from the line-of-business application value, regardless of the location of the character within the value. Enter the character you wish to strip in the <b>String</b> field. This option could be used to strip all dashes from a Social Security Number or an account number.  <b>Note:</b> Values are case sensitive.
<b>Strip from beginning</b>	Select <b>Strip from beginning</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the beginning of a value. For example, <b>Strip 5 Characters from Beginning</b> could be used to strip 3-digit area code enclosed in parentheses (###) from a telephone number.
<b>Strip from end</b>	Select <b>Strip from end</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the end of a value.

When your selection is complete, click **OK** to return to the **Keyword Types Configuration** screen. Define character-stripping options for each keyword that requires character stripping. Click **Next** to continue configuring Application Enabler.



## Parsing

The **Parse** tab allows you to extract characters and words from scraped values within the enabled application:



When parsing, Application Enabler attempts to find characters at the configured **Starting position**. Spaces are excluded from the configured **Number of characters**. For example, the **Starting position** is 1 and the **Number of characters** is 10. Application Enabler starts at 1, but encounters 8 spaces before a numeric character. In this example, Application Enabler excludes the 8 spaces from the **Number of characters** count, and the numeric character becomes the first of the 10 characters that Application Enabler will extract for the Keyword Value.

To extract characters starting at the beginning of a line:

1. Select the **Extract from beginning** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the Keyword Value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract characters starting at the end of a line:

1. Select the **Extract from end** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the keyword value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract words:

1. Select the **Word extraction** check box.
2. Enter the word number where the words that are to be extracted start in the **Starting position** field.
3. Enter the number of words you want to extract from the keyword value in the **Number of words** field.
4. Enter the character that separates the words in the **Separators** field. If you want to use a tab as a separator, click the **Insert Tab** button. A tab will be placed in the field.

---

**Note:** The default separator character is a space. Multiple characters can be entered into the field. Only one character can be used at one time and the character used must come from the list of characters entered into the **Separators** field. You must delete the space character from the field if you do not want to use spaces as separators.

---

5. If you want to account for blank values that may exist between separators, select the **Increment word count after each separator** option. This option will ensure that the number of values corresponds with the number of separators.
6. If you want to begin counting words from the end of the line, select the **Count words from the end** option.

---

**Note:** If **Count words from the end** is selected, Application Enabler will count back the specified number of words, and then extract the set number of words forward from that point.

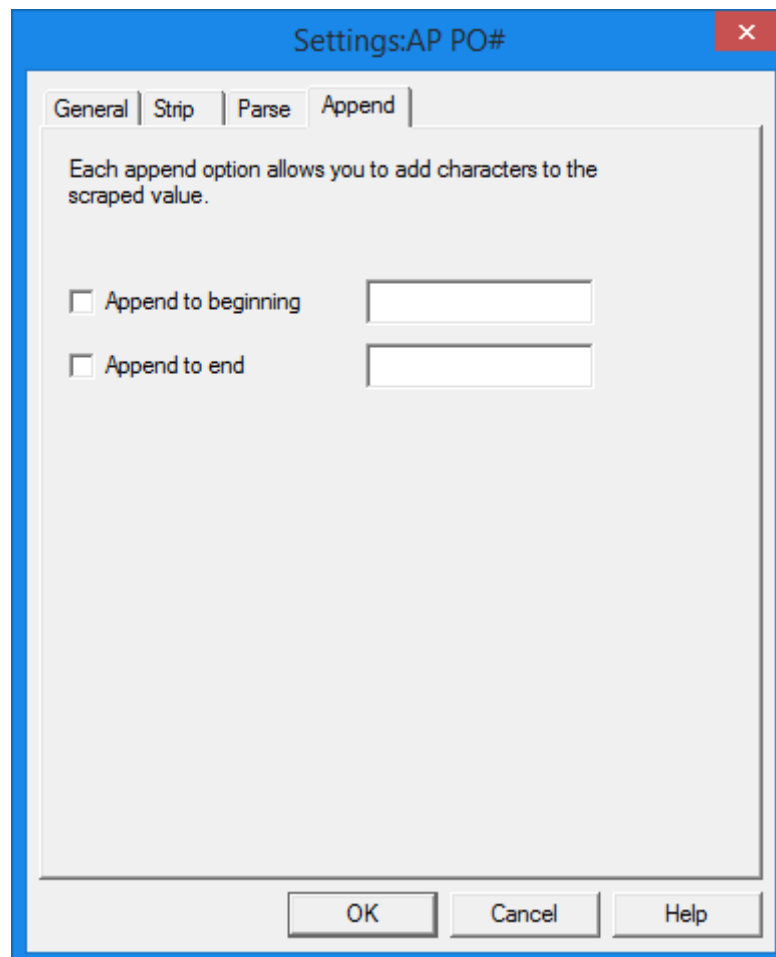
---

7. Click **OK** to return to the **Keyword Type Configuration** screen.

Advanced parsing is discussed in [Advanced Parsing on page 1](#).

## Appending Prefixes and/or Suffixes to Scraped Keyword Values

The **Append** tab allows you to configure a specific prefix and/or suffix to be affixed to scraped Keyword Values for the selected Keyword Type.



Settings:AP PO#

General | Strip | Parse | Append

Each append option allows you to add characters to the scraped value.

☐ Append to beginning

☐ Append to end

OK Cancel Help

To append a prefix or suffix:

1. Select the **Append to beginning** or **Append to end** check box(es).
2. Enter the value(s) in the field to the right of the selected check box(es).

---

**Note:** Values are case sensitive.

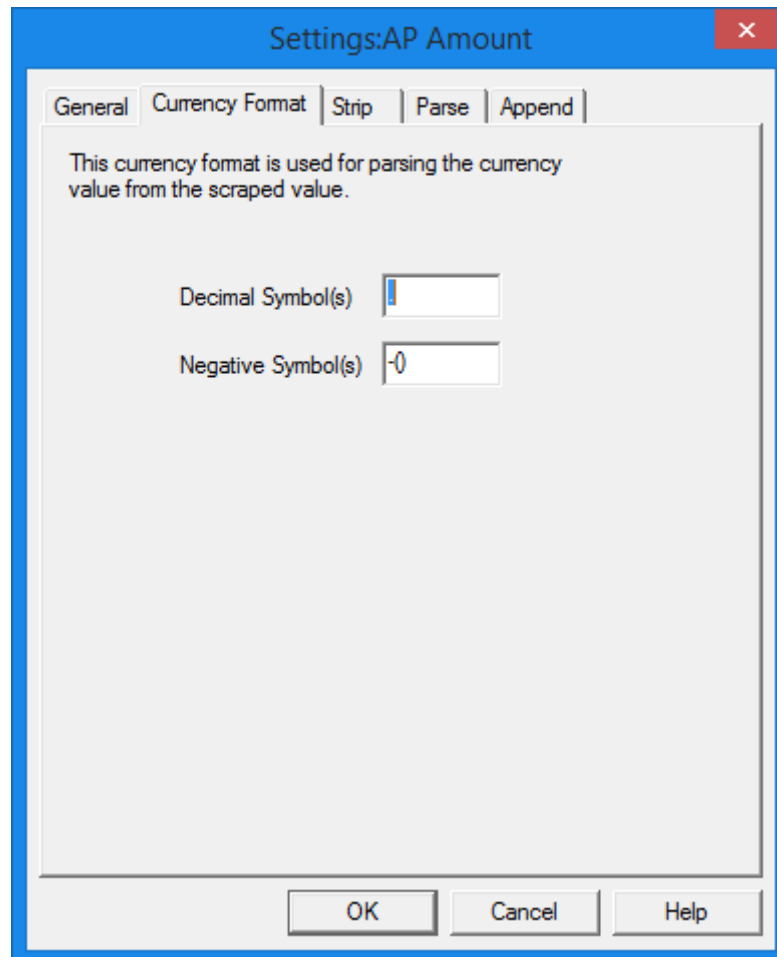
---

3. Click **OK** to return to the **Keyword Type Configuration** screen.

# Currency and Date Keyword Formatting

## Currency Keyword Formatting

For currency Keyword Types, the **Currency Format** tab is available:



In this tab, you can specify the symbol(s) to be used to separate the decimal places from the other places in values (**Decimal Symbol(s)**). You can also specify the symbol(s) to use for negative currency values (**Negative Symbol(s)**).

## Date Keyword Formatting

For date Keyword Types, the **Date Format** tab is available:

Settings:AP PO Date

General | Table | **Date Format** | Strip | Parse | Append

This date format is used for parsing all date fields out of the scraped value.

The format follows the rules for the Windows® regional date settings

Date Format:

Date Sample:

☐ Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)

OK Cancel Help

From the **Date Format** drop-down list, select the format of the date in the line-of-business application.

The following date formats are available:

Format	Example
<b>M/d/yyyy</b>	6/4/2010
<b>MM/d/yy</b>	06/4/10
<b>MM/dd/yy</b>	06/04/10
<b>MM/dd/yyyy</b>	06/04/2010
<b>yy/MM/dd</b>	10/06/04

Format	Example
yyyy-MM-dd	2010-06-04
dd-MMM-yy	04-Jun-10
MMddyy	060410
ddMMyy	040610

When a date value is scraped from the line-of-business application, the value will be converted to reflect the regional settings specified for the workstation.

If you will be scraping Umm al-Qura date values, select the **yy/mm/dd** date format and the **Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)** check box.

---

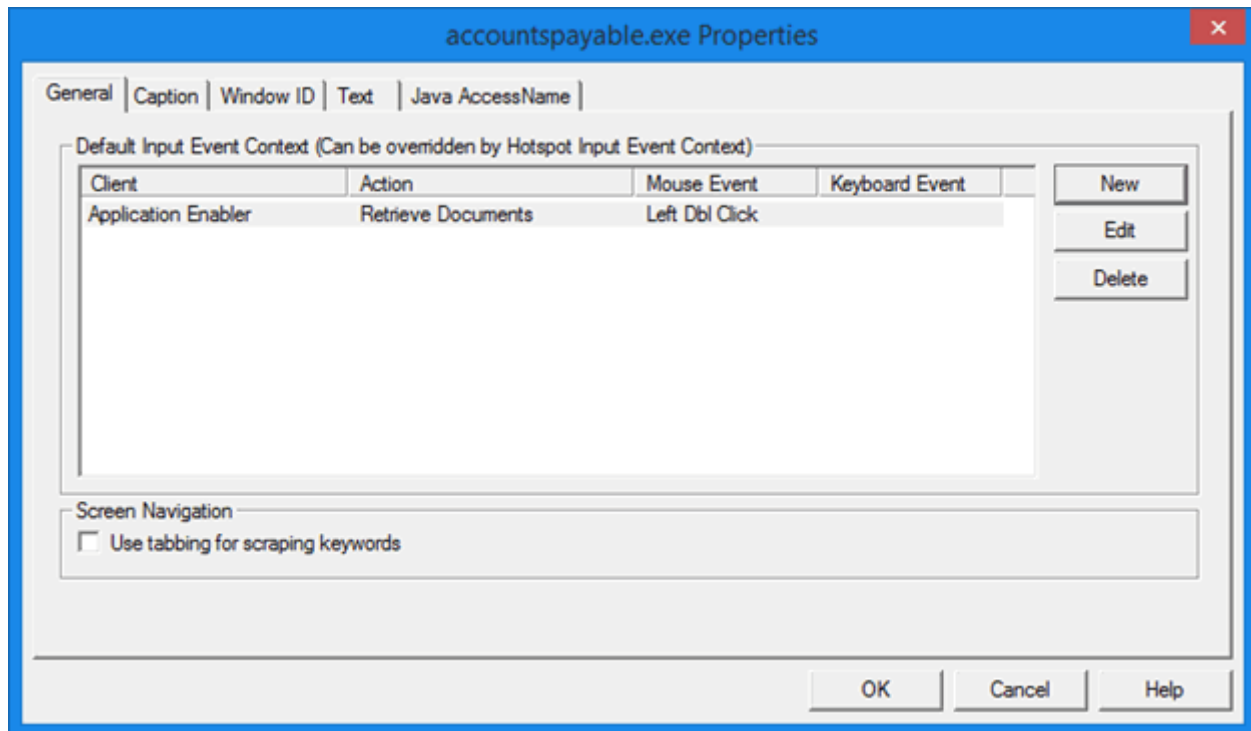
**Note:** You can only use Application Enabler contexts when scraping Umm al-Qura date values.

---

## Properties Dialog Box

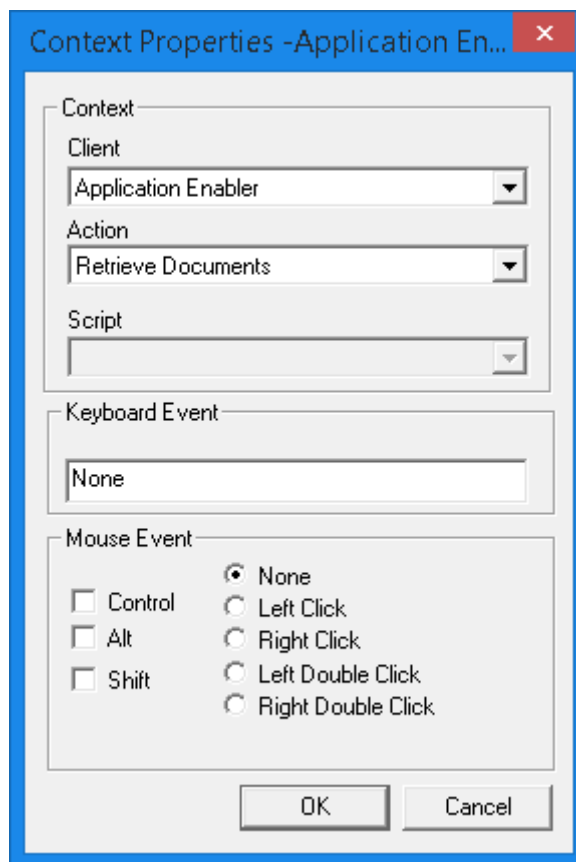
### Mouse and Keyboard Events and Contexts

The **General** tab is used to define the mouse or keyboard events used to trigger document retrieval.



**Note:** When **Desktop - Run Script** is configured as a context, the **Action** column will display the name of the VBScript.

1. To add a new mouse or keyboard event, click **New**.
2. The **Context Properties** dialog box is displayed:



3. Select the OnBase client that will be used to execute the context from the **Client** drop-down list, and the action to be executed from the **Action** drop-down list. For more information on available clients and actions, see [Using Contexts on page 288](#).
4. Depending on the action and context you have configured, you can select either a VBScript or a Unity Script to associate with the keyboard or mouse event from the **Script** drop-down list. The VBScripts and Unity Scripts that are available are those that have been configured for the database that is currently connected.
5. To define a keyboard event used to trigger a search, place your cursor in the **Keyboard Event** field and type the desired keystroke or keystroke combination. For example, press **Ctrl** and **F5** simultaneously to define **Ctrl+F5** as a keystroke combination.
6. To define a mouse event used to trigger a search, select the mouse event from the **Mouse Event** options (**Left Click**, **Right Click**, etc.). You can create a combination keystroke and click event by selecting the **Control**, **Alt**, or **Shift** options in addition to a click event.

When defining mouse events:

- It is recommended to use a keyboard key in addition to the **Left Click** and **Right Click** options. It is also recommended to not use similar mouse and keyboard events in the same application. For example, Shift+Left Click and Shift+Left Double Click.
- The **Left Double Click** and **Right Double Click** options are not supported when enabling a Java-based application.



- The **Left Double Click** and **Right Double Click** options are registered as two single mouse clicks when enabling certain Smart-Screen applications (i.e., WPF and Silverlight applications). To enable these applications, use the **Left Click** or **Right Click** options.
7. Click **OK**.
  8. If you want to use the **Tab** keyboard key to scrape values from the enabled screen, select the **Use tabbing for scraping keywords** check box.
  9. Click **OK**.

---

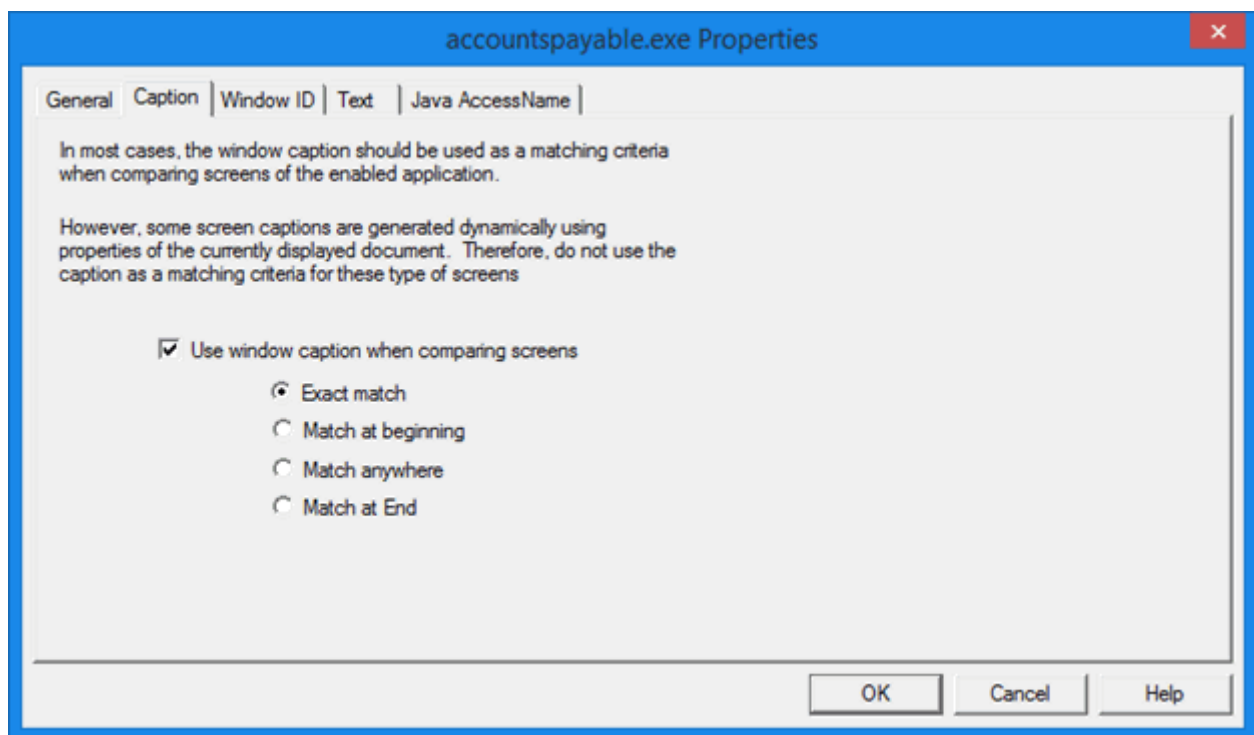
**Note:** Mouse/keyboard events can be changed after configuration by opening an existing configuration, selecting an application, clicking **Configure**, selecting a context, and clicking **Edit**.

---

## Caption

You can use the combination of Window ID and Caption to identify a screen. If both are selected, a screen must meet all of the criteria in order to be identified by Application Enabler.

You can identify a screen by its caption using the **Caption** tab:



The **Use window caption when comparing screens** option is selected by default. This is generally used when no Window ID exists. To identify the screen only by its caption:

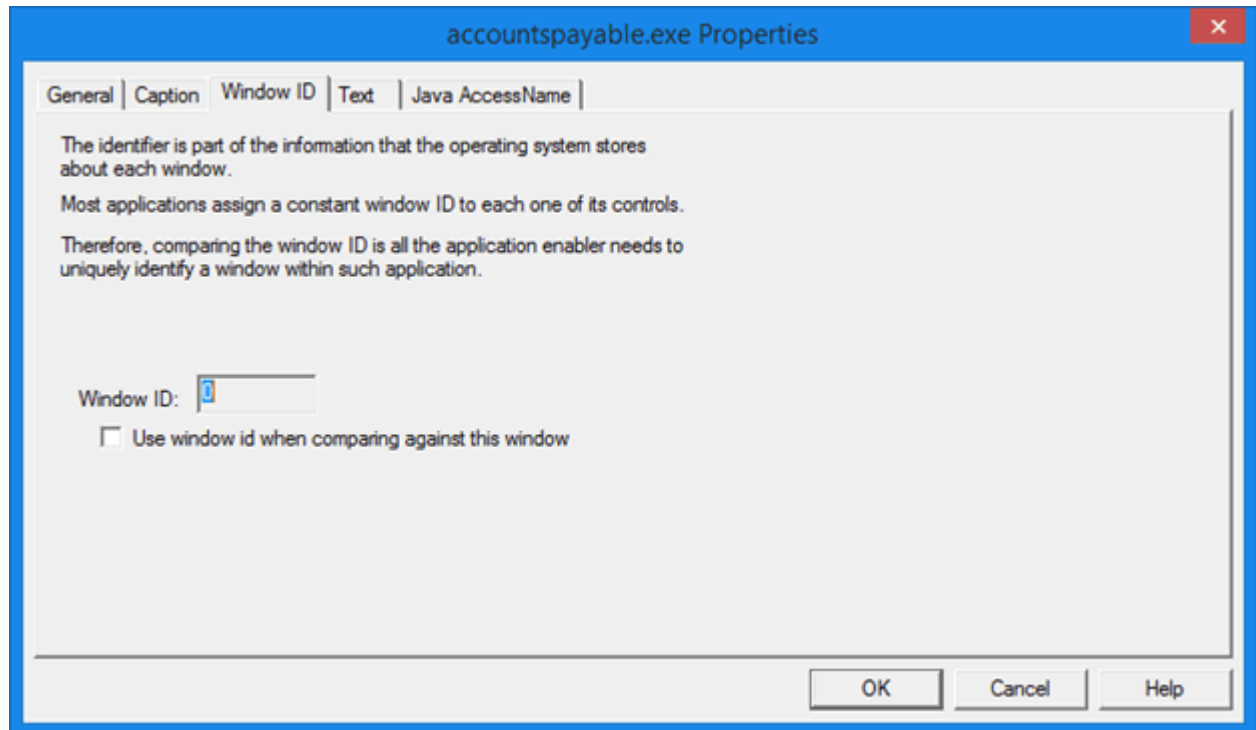
1. Clear **Use window id when comparing against this window** on the **Window ID** tab.
2. On the **Caption** tab, select the **Use window caption when comparing screens** check box and select one of the following options:

Options	Description
<b>Exact match</b>	The caption of a screen must exactly match the caption entered at the time of configuration.
<b>Match at beginning</b>	The caption of a screen must match the beginning of the caption entered at the time of configuration.
<b>Match anywhere</b>	The caption of a screen must match the caption entered at the time of configuration anywhere in the caption.
<b>Match at End</b>	The caption of a screen must match the end of the caption entered at the time of configuration.

3. Click **OK**.

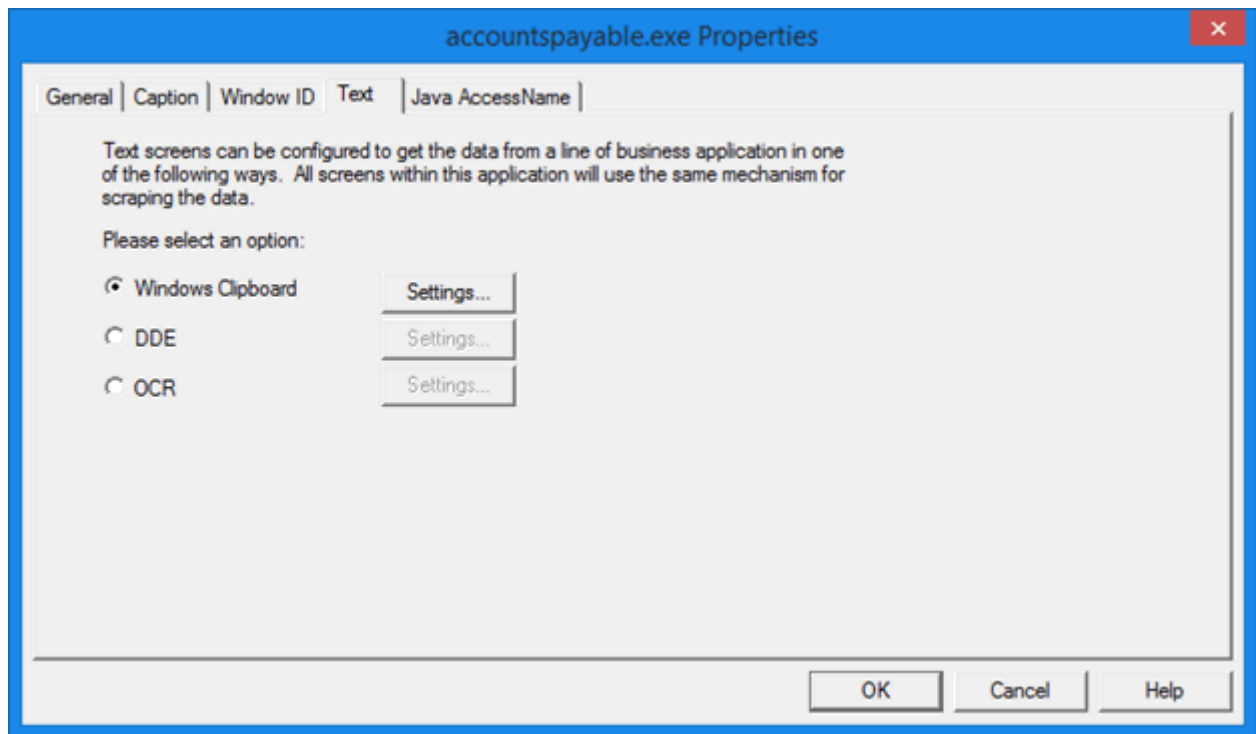
## Window ID

Application Enabler Configuration uses the Window ID as the identification of a screen. The **Use window id when comparing against this window** option must be selected on the **Window ID** tab:



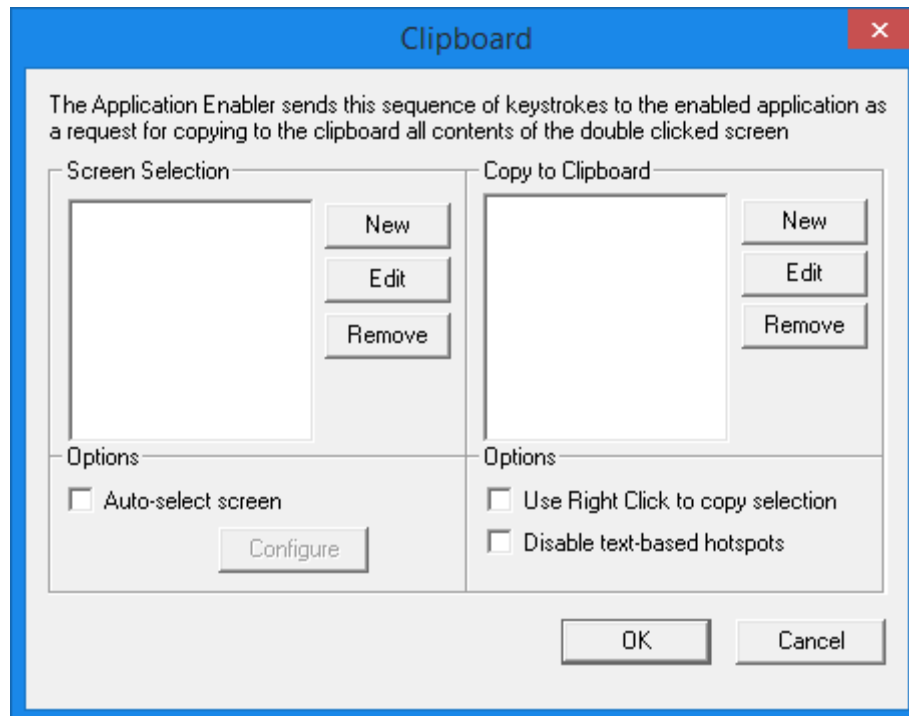
## Text

The **Text** tab is used to configure text screens.



Application Enabler supports three methods for scraping text screens. Select one of the buttons described in the following sections and click the corresponding **Settings** button to configure additional settings.

## Windows Clipboard

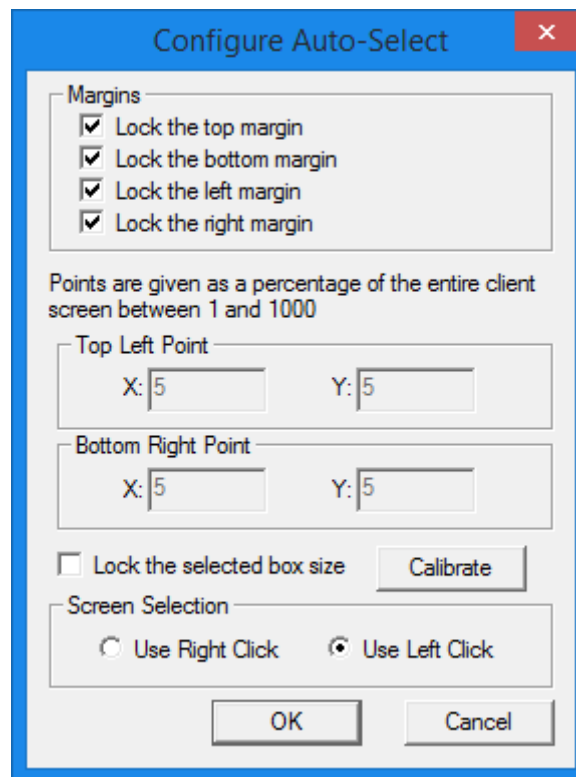


Application Enabler identifies text-based screens and screen data by the line and column location of characters on the text screen. In order to accurately map characters, Application Enabler copies each configured text screen to the Windows clipboard. The **Windows Clipboard** setting allows you to define which keystrokes are used to select a screen and copy it to the clipboard. In most cases, text-based applications will enable when the standard **CTRL + A** (select all) and **CTRL + C** (copy all) are used. Some applications may require alternate keystroke combinations.

1. Click **New**.
2. Enter the keystroke combination in the text field.
3. Click **OK**.

Some applications require automatic selection of the screen to copy text to the clipboard. In this case, select **Auto-select screen**. When this option is selected, the **Configure** button is enabled. To configure the **Auto-select screen** option:

1. Click **Configure**. The **Configure Auto-Select** dialog box is displayed.



2. Select **Lock the top margin** to keep the top margin the same size (in pixels) no matter how the client window is resized.
3. Select **Lock the bottom margin** to keep the bottom margin the same size (in pixels) no matter how the client window is resized.
4. Select **Lock the left margin** to keep the left margin the same size (in pixels) no matter how the client window is resized.
5. Select **Lock the right margin** to keep the right margin the same size (in pixels) no matter how the client window is resized.
6. Select **Lock the selected box size** to keep the box that was selected in the client screen stay the same size no matter how the client window is resized. This option can be used along with the **Lock the top margin** and **Lock the left margin** options to keep the selected area in the same place no matter how the client area is resized.
7. If you want to specify the area of an application that should be auto-selected, click **Calibrate**. This option should only be used for applications that have auto-selection enabled.

8. If you want to use the right mouse button to select the screen, select **Use Right Click**. If you want to use the left mouse button to select the screen, select **Use Left Click**.
9. On the line of business application, click and drag the mouse pointer across the client area that you want to be auto-selected. Coordinates will be populated in the point fields.

As check boxes are checked and unchecked the edit boxes for the initial and ending points become enabled. These values can be edited manually. These values are based on a percentage of the screen out of 1000.

---

**Note:** If the box is not enabled the value inside the box is not restricted to a percentage.

---

If locks are changed while in the auto-select dialog the calibrate button must be used to select the box in the client screen.

Some applications may require that you right-click to copy to the clipboard. In this case, select **Use Right Click to copy selection** to automatically trigger the right-click action when a screen is selected.

If the **Disable text-based hotspots** option is selected, scraping from text screens will be faster. It will also disable hotspots as well. This setting should be used whenever a text-based application does not require using hotspots. This option is disabled by default.

Click **OK** when you have completed configuration.

## DDE

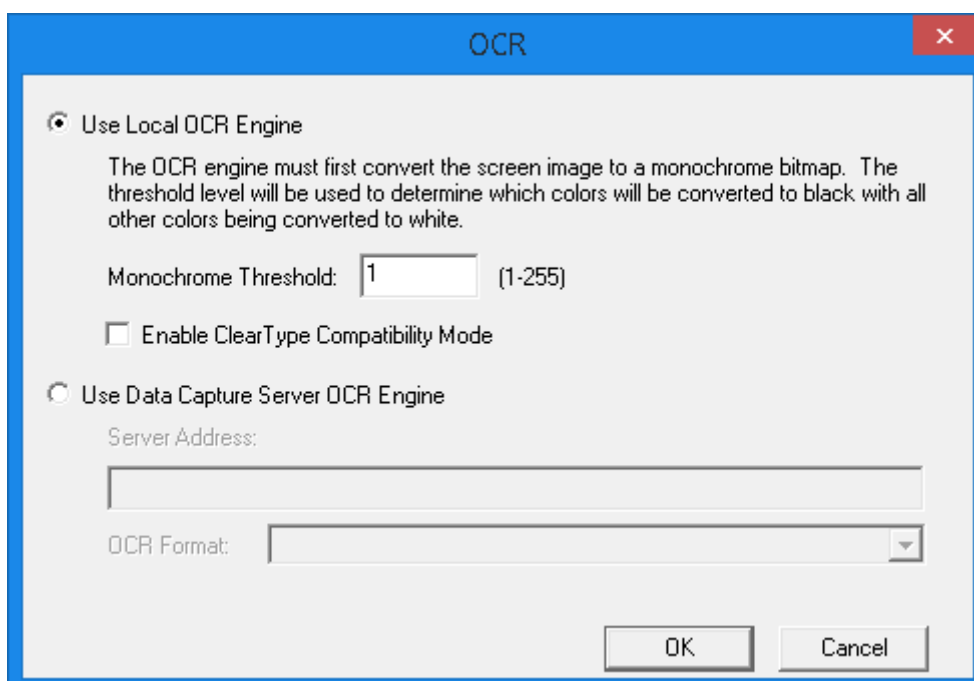
The screenshot shows a dialog box titled "DDE" with a blue header bar and a red close button in the top right corner. The main content area has a light gray background and contains the following text: "Some applications support DDE and AppEnabler can request contents through DDE links. Please provide services, topics and items or select from the lists." Below this text are two side-by-side panels. The left panel is titled "Copy Screen Content" and the right panel is titled "Request Cursor Position". Each panel contains three dropdown menus: "Service:", "Service Topic:", and "Topic Item:". At the bottom of the dialog are two buttons: "OK" and "Cancel".

The **DDE** setting should be used for text-based applications that do not communicate with the clipboard. DDE is the preferred method to use with text-based applications. DDE should be used and only if this fails should the clipboard method be used. In order to configure the DDE tab, you need to know the **Service**, **Service Topic**, and **Topic Item** for screen contents and cursor positions. These may be listed in the drop-down lists; otherwise, check server references and input manually.

Another use for the DDE setting is if you want to configure multiple hotspots on a text-based application that could potentially have the same value. Without the use of the DDE setting, the first instance of the value scraped would be used. Using the DDE option can help identify where on the screen the value was scraped from.

Click **OK** when you have completed configuration.

## OCR



The OCR configuration dialog box has a blue title bar with the text "OCR" and a red close button. It contains two radio button options. The first option, "Use Local OCR Engine", is selected. Below it is a text box for "Monochrome Threshold" with the value "1" and a range "(1-255)". There is also an unchecked checkbox for "Enable ClearType Compatibility Mode". The second option, "Use Data Capture Server OCR Engine", is unselected. Below it is a text box for "Server Address:" and a dropdown menu for "OCR Format:". At the bottom right are "OK" and "Cancel" buttons.

OCR

☒ Use Local OCR Engine

The OCR engine must first convert the screen image to a monochrome bitmap. The threshold level will be used to determine which colors will be converted to black with all other colors being converted to white.

Monochrome Threshold:  (1-255)

☐ Enable ClearType Compatibility Mode

☐ Use Data Capture Server OCR Engine

Server Address:

OCR Format:

OK Cancel



The **OCR** setting must be used if you are configuring Application Enabler to use OCR with this application.

1. Select which OCR engine should be used.
  - To use the native OCR engine, select **Use Local OCR Engine**.
  - To use the Data Capture Server OCR engine, select **Use Data Capture Server OCR Engine**.

---

**Note:** Select **Enable ClearType Compatibility Mode** or use the Data Capture Server OCR engine if the application you are enabling uses ClearType fonts.

---

**Note:** Additional licensing and configuration is required in order to use the Data Capture Server for OCR processing. See [Data Capture Server on page 326](#) for information.

---

2. If you selected **Use Local OCR Engine**, configure the **Monochrome Threshold** value, if necessary. The Monochrome Threshold value is internally used by the local OCR engine. For most applications, the default value of **1** will be sufficient. Modify this value only when the default value does not work for the screens in your application.
3. If you selected **Use Local OCR Engine**, and the application you are enabling uses ClearType fonts, select **Enable ClearType Compatibility Mode**.
4. If you selected **Use Data Capture Server OCR Engine**, configure the following settings:
  - **Server Address** - Enter the server address for the Data Capture Server. The server address must be the net.tcp address to the Data Capture Server, for example:  
`net.tcp://localhost:9050/Hyland.DataCapture.ServiceManager/service`
  - **OCR Format** - Select the OCR format to be used.

---

**Note:** For information on configuring OCR formats, refer to the **Full-Page OCR** module reference guide.

---

5. Click **OK** when you have completed configuration.

## Save and Close

Save the configuration by clicking **Save**. After saving the current configuration, Application Enabler Configuration automatically performs a health check of the configuration file. This health check helps identify configurations that may be invalid.

For example, if you configure a retrieval or indexing context but do not configure a Document Type, you will be prompted that your configuration may be invalid.

Any health check warnings that are presented are saved to a text file in the same location as the XML configuration file. This file is named **[name of XML configuration file].xml.warning.txt**.

Be sure that the directory that you save the configuration file in is available to all users that will need to use Application Enabler in conjunction with the enabled application. Click **Save**.

---

**Note:** A single Application Enabler configuration file is limited to 30 enabled applications.

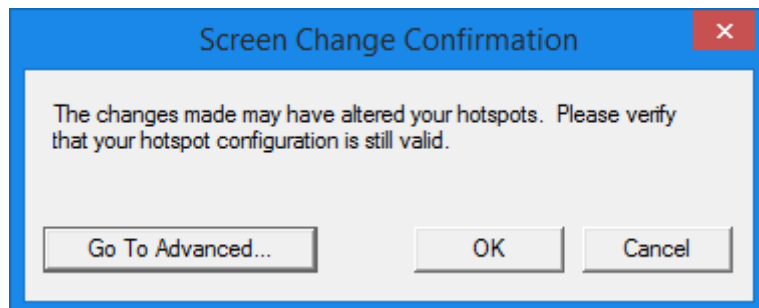
---

## Opening Existing Configurations

Refresh Application Enabler by closing and restarting the application. Open the configuration file by selecting **Load Configuration** in Application Enabler. Enable the event capturing process and test your configuration to ensure that it retrieves the desired documents.

## Editing Existing Configurations

When you change an existing configuration file, changes made may affect existing hotspot configuration. When a configuration change may have affected a hotspot configuration, the following dialog box is displayed.



Click **OK** to continue with the configuration.

Click **Go To Advanced** to go to the **Hotspots Configuration** dialog box to confirm the configuration changes are correct.

Click **Cancel**, to cancel your changes.

## Enabling HTML-Based Applications

### Configuration Overview for HTML-Based Applications

The HTML-based application configuration process creates links between HTML-based line-of-business application data fields and OnBase Keyword Types. After opening Application Enabler Configuration, create links by doing the following.

1. Open the line-of-business application to enable. See [Open the Line-of-Business Application on page 165](#).
2. Create links between line-of-business application fields and Document Types and Keyword Types. See [Create Links Between Line-of-Business Application Screens/Fields and System Keywords on page 165](#).
  - Create a new HTML screen configuration in Application Enabler Configuration.
  - Identify the HTML screen to enable.
  - If no **Name** is displayed on the **General** section, click **View Window Info Tree** and find the 'parent' of the control you are going to use. See [View Window Info Tree on page 172](#) for more information.

3. Log on to OnBase. You have access to the only those documents for which you have been granted rights. See [Logging on to OnBase on page 173](#).
  - Select the Document Types to be retrieved when on the line-of-business application screen. See [Select Document Types on page 174](#).
4. Establish a link between the OnBase Keyword Types, Unity Form fields, or WorkView attributes to a location on the line-of-business application screen. See [Associating Keyword Types, Unity Form Fields, or WorkView Attributes on page 175](#).
  - Click **Settings** to access formatting options. Select the appropriate stripping options to eliminate unwanted characters or spaces. Appropriate formatting options are available for date or currency. See [Settings on page 182](#).

---

**Note:** The formatting options on the **Strip**, **Parse**, and **Append** tabs can work in conjunction with one another. Formatting options are applied sequentially, such that options on the **Strip** tab are applied first, followed by options on the **Parse** tab, and then by options on the **Append** tab. Options on these tabs are also applied sequentially, from the top of the tab to the bottom of the tab.

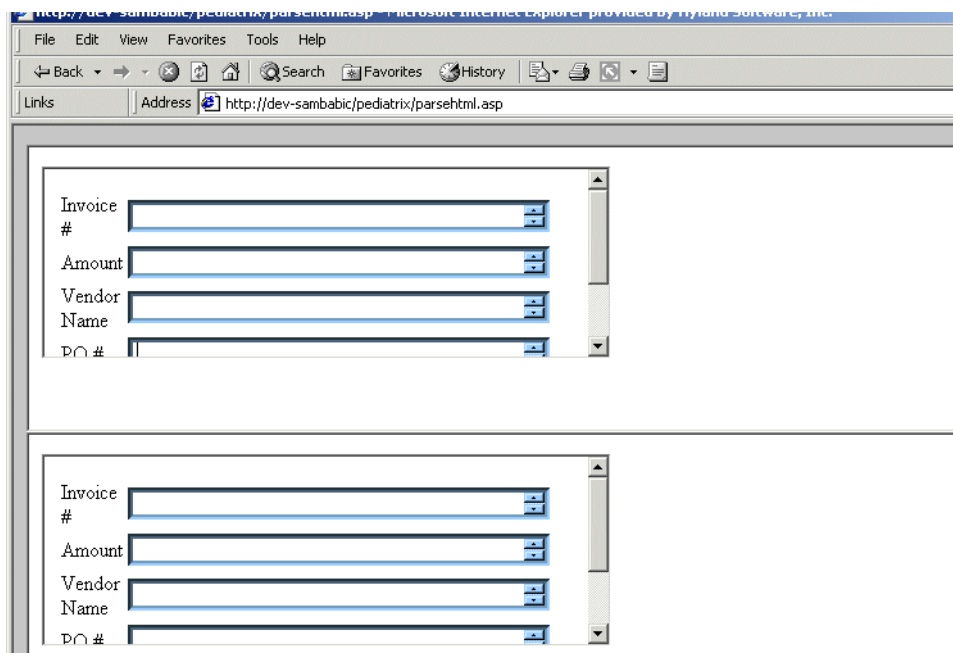
---

5. Configure properties. See [Properties Dialog Box on page 191](#).
6. Save your configuration. See [Save and Close on page 201](#).
7. Optionally, configure hotspots. See [Configuring Hotspots on page 277](#).

## Step by Step Configuration

### Open the Line-of-Business Application

Open the line-of-business application you want to enable. Example:




---

**Note:** If the line-of-business application does not display correctly when the web browser's zoom percentage is greater or less than 100%, set the zoom percentage to 100% before configuring Application Enabler.

---

### Create Links Between Line-of-Business Application Screens/Fields and System Keywords

In order to create links with the line-of-business application you will:

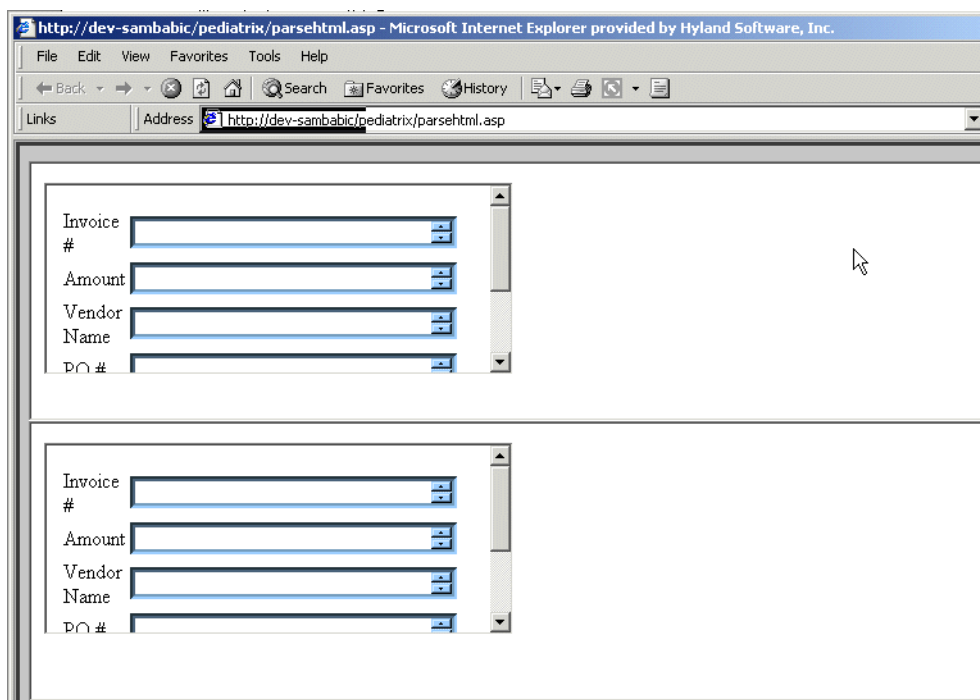
1. Identify each line-of-business application screen to enable. A line-of-business application screen is a single window of information. Line-of-business applications can have many screens. You can enable one or many screens.
2. Identify, or map, each line-of-business application form field and its related keyword in OnBase. Line-of-business application screens can contain configurable form fields, non-configurable text and other components.
3. Select keywords used for retrieval.
4. Identify optional hotspots. Hotspots allow you to retrieve OnBase documents based on values in a single line-of-business application field. If hotspots are not configured, documents are retrieved based on the value of all fields configured for the screen.

## Create a New HTML Screen Configuration

Ensure that the screen you wish to enable is visible and can be selected with a single mouse click.

To begin enabling an application:

1. In Application Enabler Configuration, click **New HTML-Screen** or the **Configure a new HTML screen** toolbar button.
2. Application Enabler Configuration prepares to capture the first screen you wish to enable.
3. As you move the mouse across the line-of-business application, areas of your screen are highlighted by a selection box (black box), which encloses the area selected for capture. Place your mouse over the line-of-business application you wish to enable. Move your mouse until the selection box encloses the entire line-of-business application screen and left-click to select it. It is possible (but not necessarily desirable) to select individual line-of-business application form fields (i.e., text boxes), in which case the selection box encloses the form field.



Application Enabler Configuration extracts the name of the line-of-business application screen and displays the **Settings** dialog box. In some cases, the line-of-business application name may not appear as you wish. Rename the screen by replacing the default name. You can use this identification method if the name/path for the application is static.

**Caution:** If you change the text in the **Caption** field and you are using the caption to identify the screen, the screen may not be identified correctly for your configuration. If this occurs, you must reconfigure the enabled application to reflect the changed caption text.

The screenshot shows a 'Settings' dialog box with a blue title bar and a red close button. The dialog is divided into two main sections: 'General' and 'Page Identification Elements'.

**General Section:**

- Name:** A text field containing 'Enterprise ERP'.
- Caption:** A text field containing 'Enterprise ERP'.
- Buttons:** 'View Details' and 'View Window Info Tree'.

**Page Identification Elements Section:**

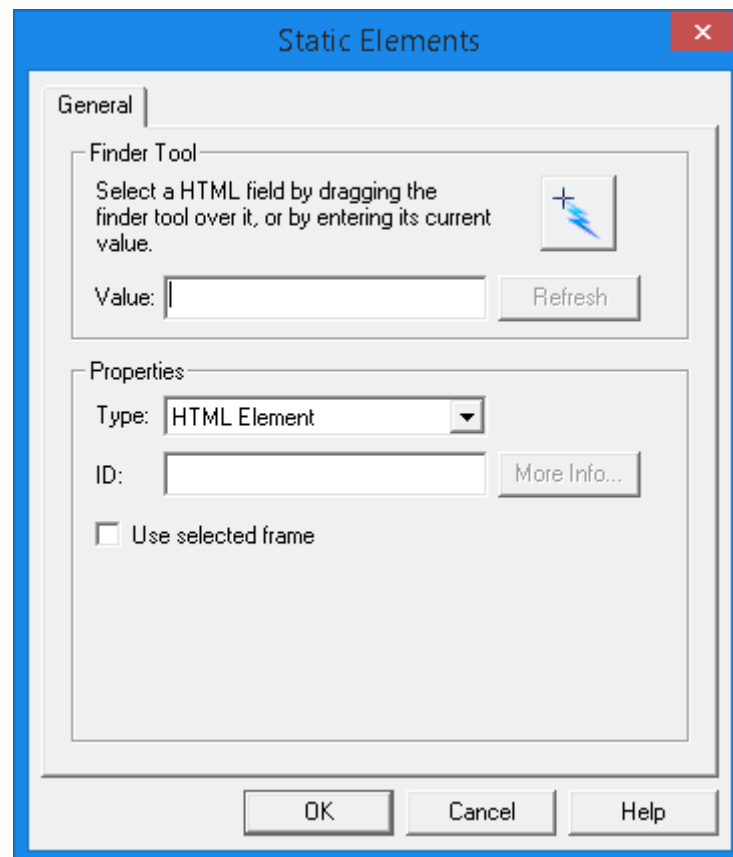
- Table:** A table with three columns: 'Type', 'Id', and 'Value'. The table is currently empty.
- Buttons:** 'New', 'Edit', and 'Remove'.

**Footer:**

- Buttons:** '< Back', 'Next >', 'Cancel', and 'Help'.

If the name/path is dynamic, you can enter **Page Identification Elements** for the page. These strings should be elements on the screen that do not change. To create **Page Identification Elements**:

1. Click **New**. The **Static Elements** dialog box is displayed:



2. Click and hold the click on the **Finder Tool** button. Drag the cursor from the button to the element in the application you want to identify. The **Value**:, **Type**:, and **ID**: fields will populate if information is available. The **More Info...** button will become enabled when no ID exists and/or when multiple occurrences of an ID exist in a table element. The **More Info...** button opens the **HTML Table Element** or **Values** dialog box. For more information on the **HTML Table Element** dialog box, see [HTML Table Element Dialog Box on page 169](#). For more information on the **Values** dialog box, see [Values Dialog Box on page 171](#).

---

**Note:** You can manually enter values, but the Finder Tool can provide easy, faster, and more accurate results.

---

3. Select the **Use selected frame** check box if the element occurrence setting should be based on the selected frame rather than the whole HTML document. This option is helpful when an application dynamically orders tables that contain enabled information.

**Note:** When you reconfigure elements, the occurrence does not change if you deselect/select this check box. You may need to remap the element, or manually change the occurrence.

4. Click **OK**. The page identification element will display in the **Settings** dialog box.
5. Repeat the above steps for each element you need to configure.
6. When done configuring page identification elements, click **Next**.

## HTML Table Element Dialog Box

The **HTML Table Element** dialog box allows you to configure how values are taken from the screen in an HTML table setting.

The screenshot shows the 'HTML Table Element' dialog box. It has a blue title bar with the text 'HTML Table Element' and a close button. The dialog is divided into three sections: 'Table', 'Row', and 'Column'. In the 'Table' section, the 'Use Specific Table' radio button is selected, and there are text boxes for 'ID:' and 'Occurrence:' (set to 1). In the 'Row' section, the 'Use Selected Row' radio button is selected, and there is a text box for 'Use Row Number:' (set to 0). In the 'Column' section, the 'Use Selected Column' radio button is selected, and there is a text box for 'Use Column Number:' (set to 0). At the bottom of the dialog are 'OK' and 'Cancel' buttons.



The following options are available in this dialog box:

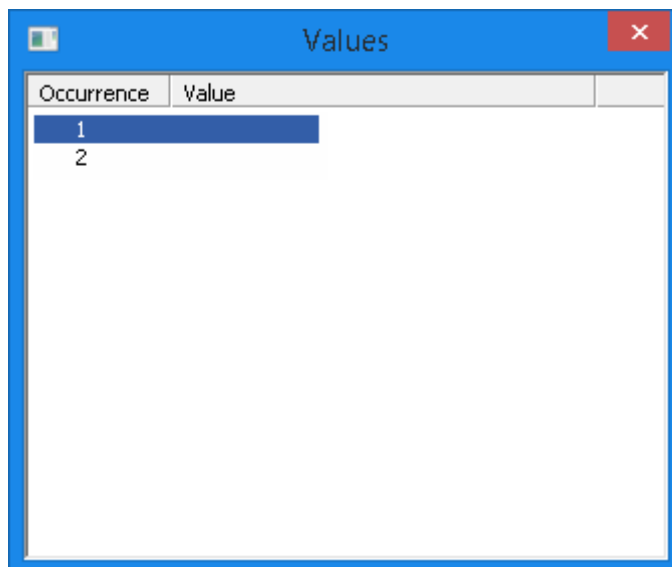
Table	Description
<b>Use Specific Table</b>	When this option is selected and you double-click on any other table, you will still get the value from the table that you configured using the ID and Occurrence information
<b>ID</b>	ID for selected table element.
<b>Occurrence</b>	Occurrence of element with that ID.
<b>Use Selected Table</b>	Allows you to enable a scrape from the selected table. When you double-click on a table, the value(s) that are in the corresponding line and column within that table will be scraped.

Row	Description
<b>Use Row Number</b>	Allows you to use the row that the current occurrence resides in.
<b>Use Selected Row</b>	Allows you to use any row within the selected column parameters within the table element to take values from.

Column	Description
<b>Use Column Number</b>	Allows you to use the column that the current occurrence resides in.
<b>Use Selected Column</b>	Allows you to use any column within the selected row parameters within the table element to take values from.

## Values Dialog Box

The **Values** dialog box allows you to configure what instance of a field you want to map to a Keyword Type.



Double-click on the occurrence you want to map to the Keyword Type.

## View Details

The **View Details** button, in the **Settings** dialog box, allows you to view the IDs associated with an application. This view can be used to identify the Name/ID you want to associate with a keyword. Below is an application and the details that were accessed after clicking the **View Details** button.

Invoice Number:	<input type="text"/>
P.O. Number:	<input type="text"/>
Vendor ID:	<input type="text"/>
Vendor Name:	<input type="text"/>
Amount:	<input type="text"/>
Business Unit:	<input type="text"/>
Part Number:	<input type="text"/>
<input type="button" value="Submit"/>	

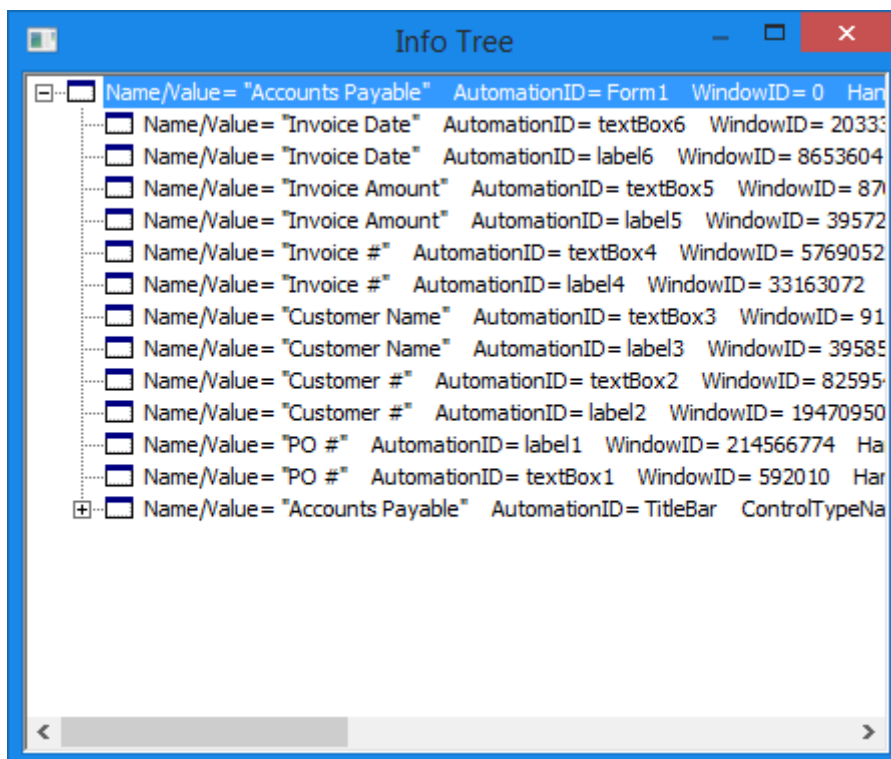
```

</TD>
- <TD value="Invoice Invoice Date: Invoice Number..."
id="growtd">
  - <TABLE value="Invoice Invoice Date: Invoice Num
id="tableInvoice">
    - <TBODY value="Invoice Invoice Date: Invoice
Number...">
      - <TR value="Invoice Invoice Date: Invoice
Number...">
        - <TD value="Invoice Invoice Date: Invoi
Number...">
          - <DIV value="Invoice Invoice Date:
Invoice Number..." id="divSearch">
            - <FORM value="Invoice Invoice D
Invoice Number..." id="frmInvoi

```

## View Window Info Tree

Clicking **View Window Info Tree** in the **Settings** dialog box opens the **Info Tree** dialog box:



This dialog box contains the following information for the application and the application's fields:

- Caption/Value
- Window ID
- Window Handle
- Class Name

This information can be helpful during configuration. This dialog box allows you to identify the parent window, a sub window, or field. To identify any parent, window, or field, right-click on any item and select **Highlight**.

In addition, you can right-click on the window and select **Search** to search. For Smart-Screen, Windows-based, text-based, HTML-based, and Dynamics GP-based applications, the Caption/Value item will be searched. For Java-based applications, Value, AccessName, and AccessDescription will be searched.

You can also right-click on the window and select **Save As** to save the data in the **Info Tree** dialog box to a text file.

---

**Note:** When configuring an HTML-based application and multiple windows in the tree hierarchy have the same Caption/Value, use the lowest level of the Caption/Value.

---

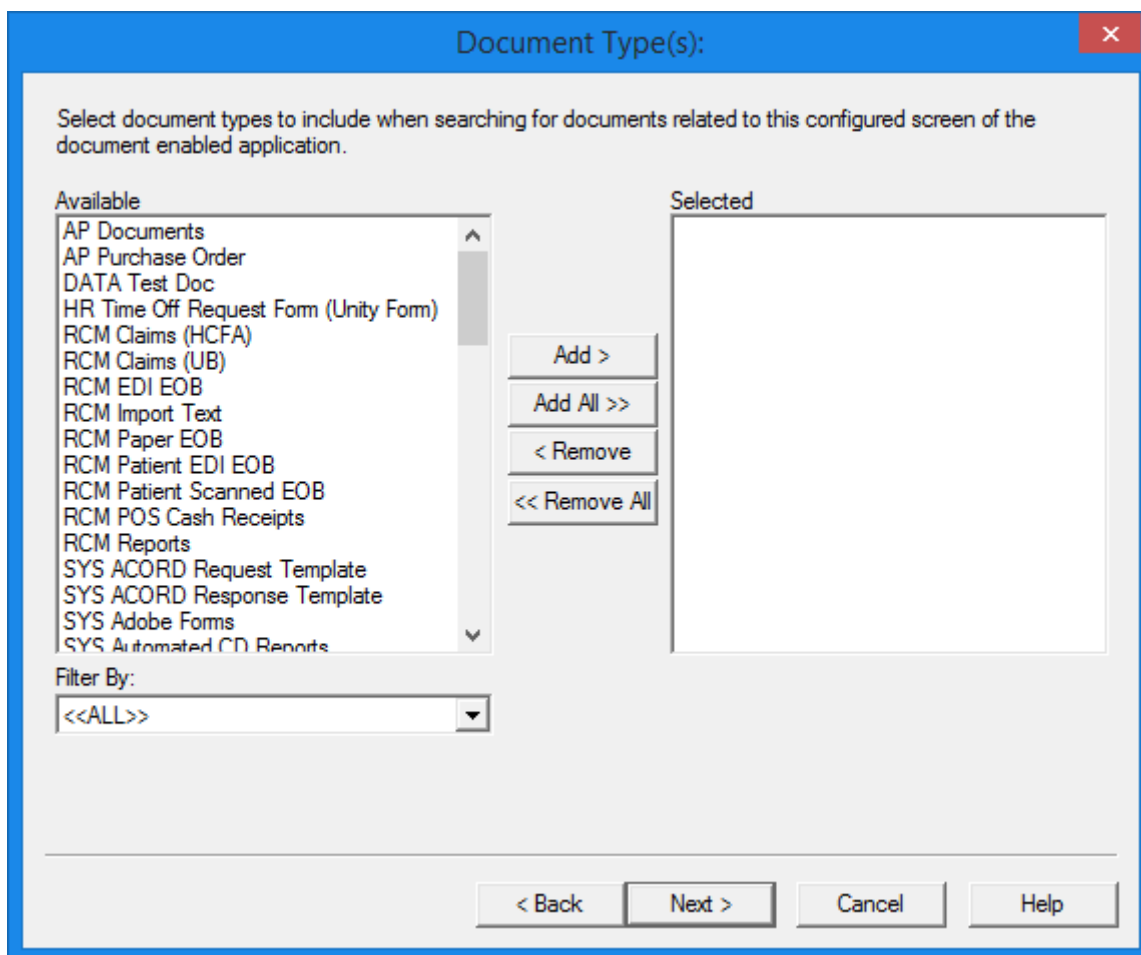
## Logging on to OnBase

If you are not currently connected to OnBase, a window opens and prompts you to log on.

1. Select the appropriate data source from the drop-down list. This drop-down list is only displayed when multiple data sources are available.
2. Type your OnBase user name.
3. Type your OnBase password.
4. Click **Login** to log on, or click **Cancel** to close the dialog without logging on.

## Select Document Types

The **Document Type(s)** dialog box is displayed:



1. Select the Document Types to search when retrieving OnBase documents through the line-of-business application. If you want to display all documents related to a screen, select all the Document Types that a user could possibly need from this screen. If you want to display only documents most relevant to a screen, select only the Document Types that most closely relate to the screen. Cross-referencing can be used to find other less closely related documents. Hold down the **Ctrl** key while selecting Document Types to select multiple Document Types that are not consecutively listed. Hold down the **Shift** key while selecting Document Types to select multiple Document Types that are consecutively listed.

---

**Note:** A Document Type is not required if you are configuring Healthcare Module Keyword Types or WorkView attributes.

---

2. Select one or multiple (using the Ctrl or Shift keys) Document Types from the **Available** list and click **Add** to add them to the **Selected** list. To add all Document Types, click **Add All**.  
To remove one or multiple (using the Ctrl or Shift keys) Document Types from the **Selected** list, select the Document Type(s) and click **Remove**. To remove all Document Types, click **Remove All**.
3. To filter available Document Types by Document Type Group, select a Document Type Group from the **Filter By** drop-down list.
4. Click **Next** to continue.

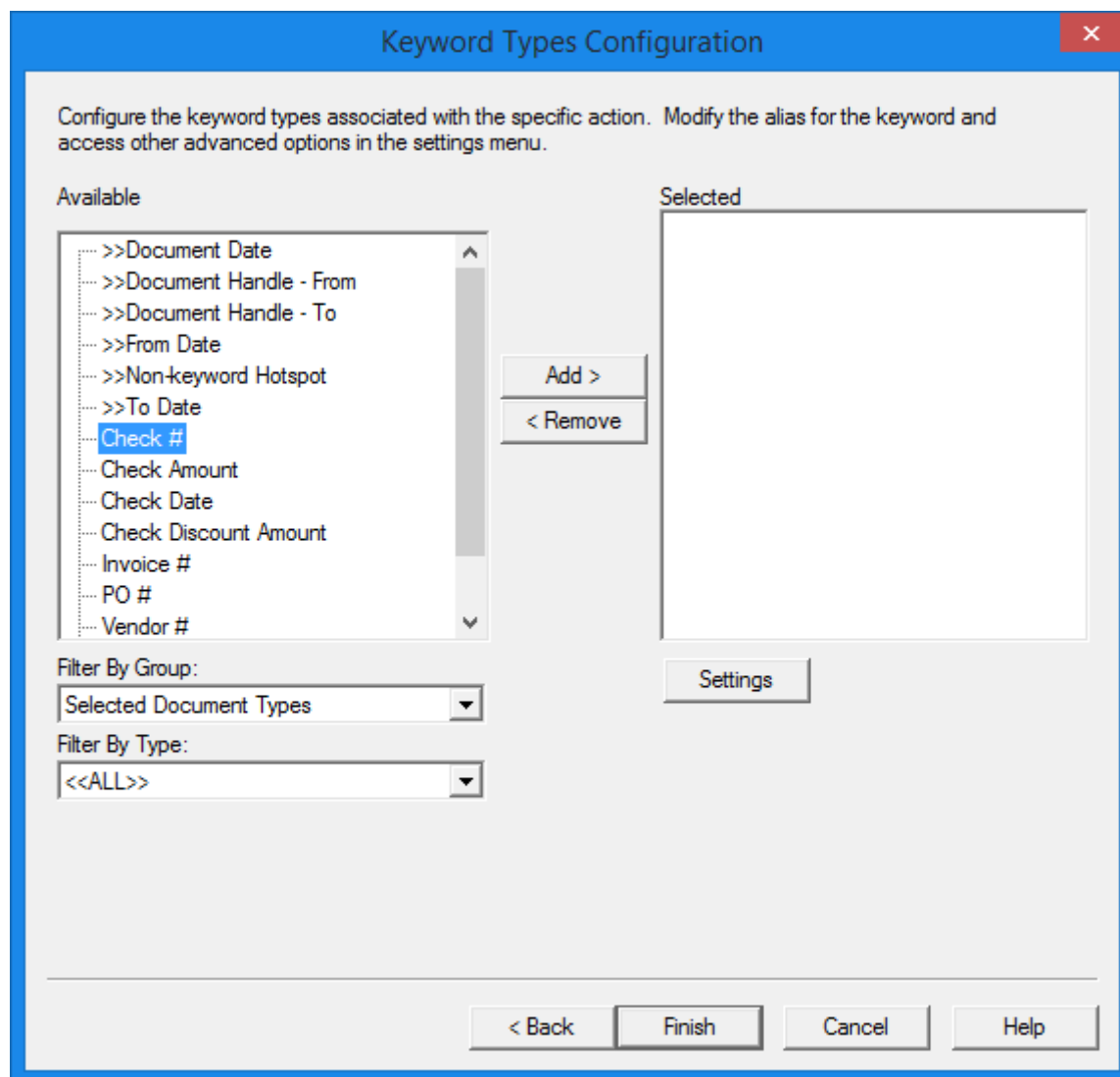
## Associating Keyword Types, Unity Form Fields, or WorkView Attributes

---

**Caution:** Specific Currency Keyword Types are not currently supported for use with Application Enabler.

---

After selecting Document Types, the **Keyword Types Configuration** dialog box is displayed.



This screen allows you to associate Keyword Types, Unity Form fields, or WorkView attributes with the configured screen.

You can filter the **Available** list using the **Filter By Group** and **Filter By Type** drop-down lists. These two drop-down lists work together to narrow down the items that are displayed for easy selection and configuration. The **Filter By Group** drop-down list includes the following:

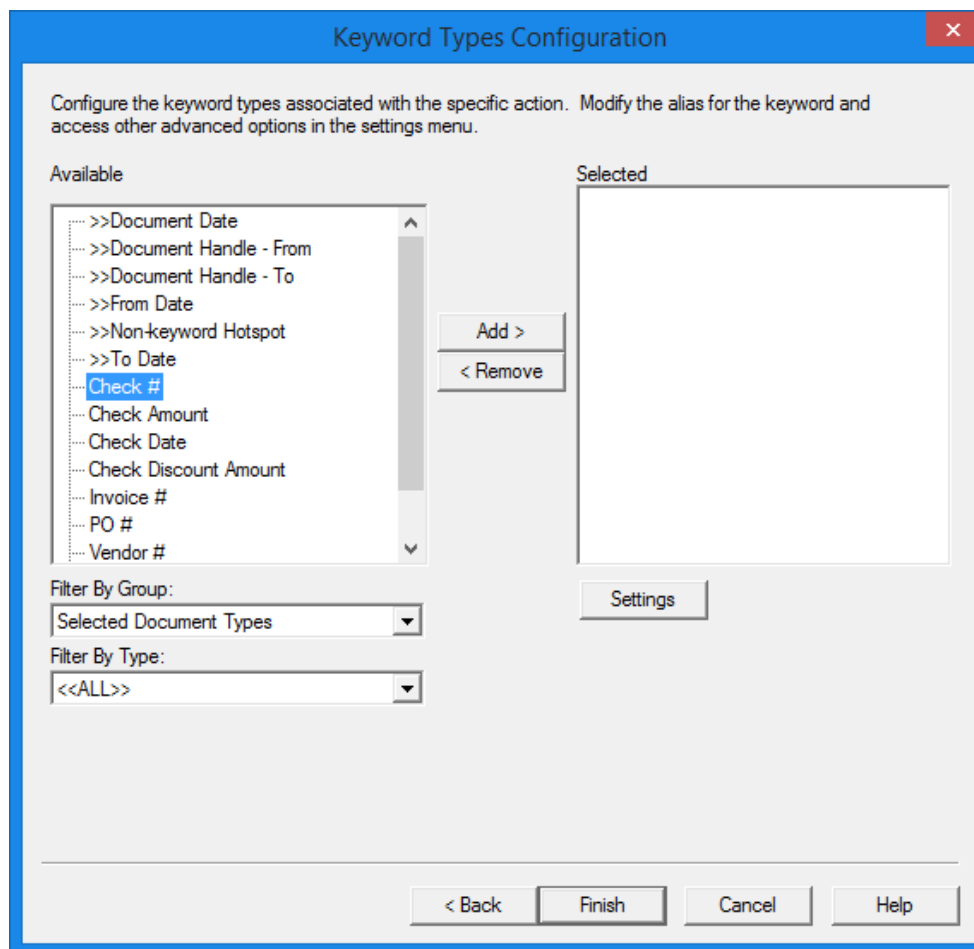
Filter By Group	Description
<b>Combined View Types</b>	When selected, the <b>Available</b> list displays any Combined View Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen. The <b>Filter By Type</b> drop-down list contains the available Combined View Types.

Filter By Group	Description
<b>Government Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase government module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the <b>Plan Review</b> selection, which is for the Electronic Plan Review module.</p>
<b>Healthcare Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase healthcare module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the following OnBase healthcare modules:</p> <ul style="list-style-type: none"> <li>• DeficiencyPop</li> <li>• RAC Audit</li> <li>• Patient Window</li> </ul> <hr/> <p><b>Note:</b> The ChartPop, DeficiencyPop, and LongitudinalPop options are maintained for legacy purposes only. For new medical deployments, please use the OnBase Patient Window.</p> <hr/>
<b>Selected Document Types</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen.</p> <p>The <b>Filter By Type</b> drop-down list contains the Document Types that were selected on the <b>Document Type(s):</b> screen.</p>
<b>Unity Form Templates</b>	<p>When selected, the <b>Available</b> list displays any Unity Form fields associated with the Unity Form template selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of Unity Form templates.</p>
<b>Workview App</b>	<p>When selected, the <b>Available</b> list displays any WorkView attributes associated with the WorkView class that is selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of WorkView classes.</p> <hr/> <p><b>Note:</b> The following WorkView attribute Data Types are not supported for use with Application Enabler, and are not displayed during configuration: Text, Formatted Text, Document, Date/Time. External classes are not supported for use with Application Enabler. Multiple level relationships (for example, AssignedEmployee.Manager.FullName) are also not supported.</p> <hr/>



1. If you are configuring a Keyword Type, select the Keyword Type in the **Available** list and click **Add**.

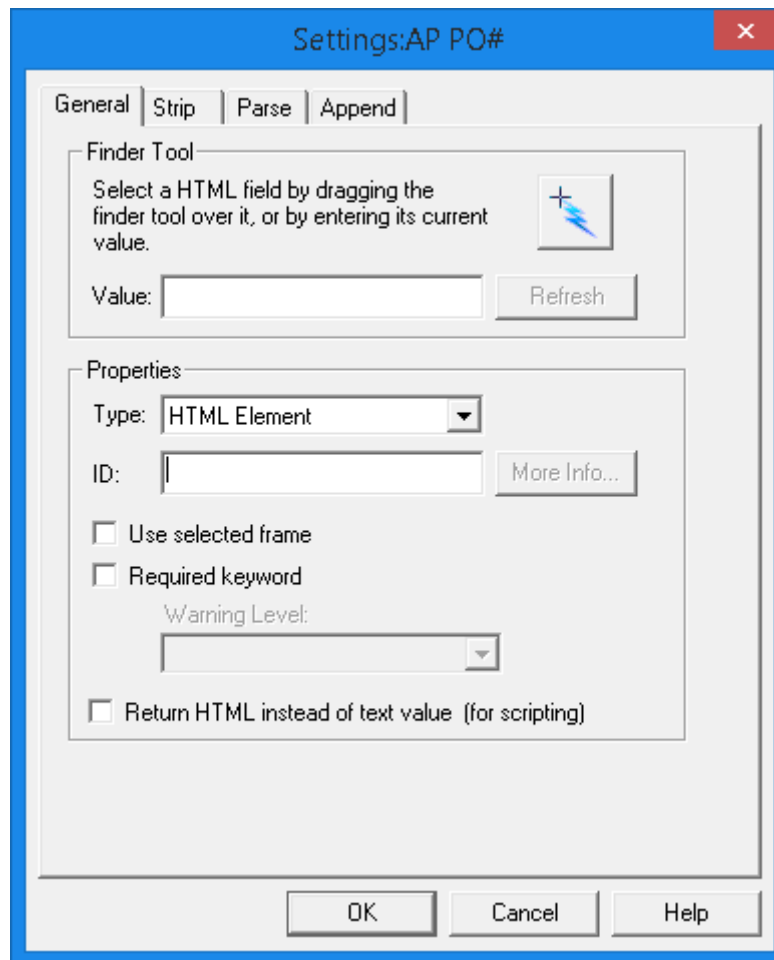
Keyword Types that are mapped to system properties are available for configuration. See >>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date on page 180 for more information.



If you are configuring a Unity Form, select Unity Form fields in the **Available** list and click **Add**.

If you are configuring a WorkView attribute, select the attribute in the **Available** list and click **Add**. Nested attributes are displayed with a + symbol.

2. Click **Add**. The **Settings:** dialog box is displayed. It contains the **General**, **Strip**, **Parse**, and **Append** tabs.



3. If you want to access strings of text to identify the element for scripting purposes, select the **Return HTML instead of text value (for scripting)** check box.
4. Click and hold the click on the **Finder Tool** button. Drag the cursor from the button to the element in the application you want to map a Keyword Type. The **Value:**, **Type:**, and **ID:** fields will populate if information is available. The **More Info...** button will become enabled when no ID exists and/or when multiple occurrences of an ID exist in a table element. The **More Info...** button opens the **HTML Table Element** dialog box. For more information on this dialog box, see [HTML Table Element Dialog Box on page 169](#).

---

**Note:** You can manually enter values, but the Finder Tool can provide easy, faster, and more accurate results.

---



---

**Note:** If you are mapping hidden HTML elements, you must enter the **Value** of the element and press **Tab** in order to map the element.

---

5. Select the **Use selected frame** check box if the keyword occurrence setting should be based on the selected frame rather than the whole HTML document. This option is helpful when an application dynamically orders tables that contain enabled information.

---

**Note:** When you reconfigure keywords, the occurrence does not change if you deselect/select this check box. You may need to remap the keyword, or manually change the occurrence.

---

6. Select the **Required keyword** check box option if you want to make the keyword required for Application Enabler actions.
7. If you want to configure stripping and parsing settings, configure them on the **Strip** and **Parse** tabs discussed in [Character Stripping on page 183](#) and [Parsing on page 185](#). If you want to append a specific prefix and suffix to scraped Keyword Values for the selected Keyword Type, configure them on the **Append** tab discussed below. When you are done configuring the keyword settings, click **OK**. The **Keyword Types Configuration** dialog box will display.
8. Repeat steps 1-7 for each element you need to configure.

---

**Note:** Multiple IDs can be associated with a single keyword type. When a new ID is associated with a keyword that already is associated with an ID, the keyword name is followed by an incremental number in parenthesis to distinguish between the different associated IDs. Multiple occurrences of IDs can be associated with keywords. Example: The second association of the Vendor Name Keyword Type with an ID results in a Keyword Type name of Vendor Name (01). The third association results in a Keyword Type name of Vendor Name (02).

---



---

**Note:** WorkView attributes, Unity Form fields, and module-specific Keyword Types can only be mapped to a field once.

---

9. Click **Next**.

**>>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date**

The **>>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date** Keyword Type selections have distinct purposes.

Keyword Type	Description
<b>&gt;&gt;Document Date</b>	<p>Allows you to map to the Document Date of a document during indexing.</p> <hr/> <p><b>Note:</b> The <b>&gt;&gt;Document Date</b> Keyword Type is not respected by all Application Enabler contexts. For more information, see <a href="#">Using Contexts on page 288</a>.</p> <hr/>

Keyword Type	Description
>>Document Handle - From	<p>Allows you to map to the <b>From</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b>, and <b>Application Enabler - Retrieve in Workflow</b> contexts, or generate document packets with the <b>Application Enabler - Generate Document Packets</b> context.</p> <p>To retrieve using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Retrieve Documents</b> and <b>Application Enabler - Retrieve in Workflow</b> will only retrieve the single Document Handle that matches the scraped value.</p> <p>To generate a document packet using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Generate Document Packets</b> will only generate the packet for that single Document Handle that matches the scraped value.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - From Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/> <p><b>Note:</b> When using the &gt;&gt;Document Handle - From Keyword Type with the <b>Application Enabler - Retrieve in Workflow</b> context, all other keywords that are passed in will be ignored.</p> <hr/> <p><b>Note:</b> In order for document retrieval to function as expected when using the <b>Document Handle</b> system keyword, the <b>Retrieve by Document Handle / File Name</b> product right must be assigned to the user's user group in the OnBase Configuration module.</p> <hr/>
>>Document Handle - To	<p>Allows you to map to the <b>To</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b> context.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - To Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/>
>>From Date	<p>Allows you to map to the <b>From</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

Keyword Type	Description
>>Non-keyword Hotspot	Allows you to map a hotspot to any screen element without mapping the element to a Keyword Type. This will allow a screen scrape to be initiated from any element on the screen. For example, using this selection, the hotspot could be mapped to a button on the screen that is not associated with a Keyword Value.
>>To Date	<p>Allows you to map to the <b>To</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

## Settings

The **Settings** dialog box is opened by clicking the **Settings** button on the **Keyword Types Configuration** screen. Available settings are described in the following sections:

- [Setting a Keyword as Required on page 182](#)
- [Character Stripping on page 183](#)
- [Parsing on page 185](#)
- [Appending Prefixes and/or Suffixes to Scraped Keyword Values on page 187](#)
- [Currency Keyword Formatting on page 188](#)
- [Date Keyword Formatting on page 189](#)

### Setting a Keyword as Required

The **General** tab allows you to set a Keyword Type as a required keyword. To make a keyword required, select **Required keyword**. You can select either **Warn and continue** or **Warn and cancel** from the **Warning Level** drop-down list to determine if you want users to be able to continue a query that does not specify a value for a required keyword. You can also click **View Window Info Tree** to access the **Info Tree** dialog box. This dialog box can be used to identify fields to map to Keyword Types.

## Character Stripping

If you wish to retrieve documents based on a subset of characters within a value, you can configure Application Enabler to "strip" characters to exclude from the search using the **Strip** tab. For example, if a line-of-business application field contains a full phone number and you wish to retrieve OnBase documents based on area code, configure character stripping to remove all characters but the area code from the line-of-business application field.

Settings:AP PO#

General Strip Parse Append

Each strip option allows you to remove selected characters for the scraped value.  
Each option is applied in a top to bottom sequence.

☐ Strip spaces

☐ Strip any occurrences of string

String:

☐ Strip from beginning

Number of characters:

☐ Strip from end

Number of characters:

OK Cancel Help

The sequence of operation is from the top down. Application Enabler first strips spaces (if checked) then strips characters (if checked) and so on.

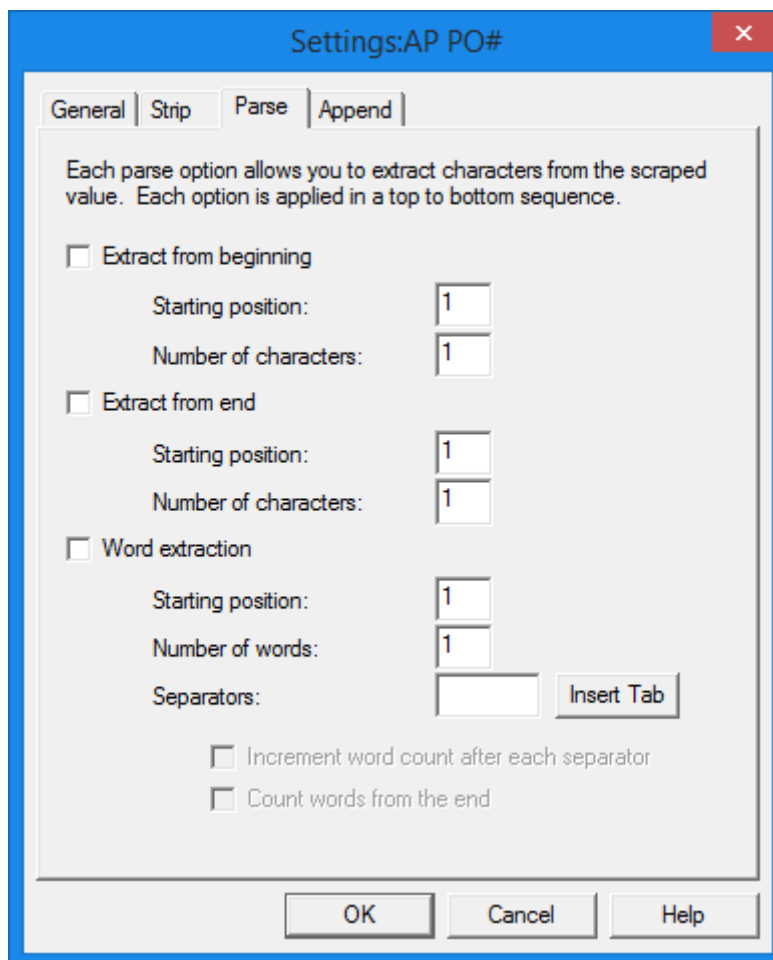
The following settings are available on the **Strip** tab:

Setting	Description
<b>Strip spaces</b>	Select <b>Strip spaces</b> to remove all spaces from the line-of-business application value, regardless of the location of the spaces. For example, if <b>Strip spaces</b> is selected, double-clicking on a properly configured line-of-business application field containing <b>2_2__16_44__</b> (where _ represents a space) will return OnBase documents with the Keyword Value <b>221644</b> .
<b>Strip any occurrences of string</b>	Select <b>Strip any occurrences of string</b> to strip all occurrences of a specific character from the line-of-business application value, regardless of the location of the character within the value. Enter the character you wish to strip in the <b>String</b> field. This option could be used to strip all dashes from a Social Security Number or an account number.  <b>Note:</b> Values are case sensitive.
<b>Strip from beginning</b>	Select <b>Strip from beginning</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the beginning of a value. For example, <b>Strip 5 Characters from Beginning</b> could be used to strip 3-digit area code enclosed in parentheses (###) from a telephone number.
<b>Strip from end</b>	Select <b>Strip from end</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the end of a value.

When your selection is complete, click **OK** to return to the **Keyword Types Configuration** screen. Define character-stripping options for each keyword that requires character stripping. Click **Next** to continue configuring Application Enabler.

## Parsing

The **Parse** tab allows you to extract characters and words from scraped values within the enabled application:



When parsing, Application Enabler attempts to find characters at the configured **Starting position**. Spaces are excluded from the configured **Number of characters**. For example, the **Starting position** is 1 and the **Number of characters** is 10. Application Enabler starts at 1, but encounters 8 spaces before a numeric character. In this example, Application Enabler excludes the 8 spaces from the **Number of characters** count, and the numeric character becomes the first of the 10 characters that Application Enabler will extract for the Keyword Value.

To extract characters starting at the beginning of a line:

1. Select the **Extract from beginning** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the Keyword Value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.



To extract characters starting at the end of a line:

1. Select the **Extract from end** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the keyword value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract words:

1. Select the **Word extraction** check box.
2. Enter the word number where the words that are to be extracted start in the **Starting position** field.
3. Enter the number of words you want to extract from the keyword value in the **Number of words** field.
4. Enter the character that separates the words in the **Separators** field. If you want to use a tab as a separator, click the **Insert Tab** button. A tab will be placed in the field.

---

**Note:** The default separator character is a space. Multiple characters can be entered into the field. Only one character can be used at one time and the character used must come from the list of characters entered into the **Separators** field. You must delete the space character from the field if you do not want to use spaces as separators.

---

5. If you want to account for blank values that may exist between separators, select the **Increment word count after each separator** option. This option will ensure that the number of values corresponds with the number of separators.
6. If you want to begin counting words from the end of the line, select the **Count words from the end** option.

---

**Note:** If **Count words from the end** is selected, Application Enabler will count back the specified number of words, and then extract the set number of words forward from that point.

---

7. Click **OK** to return to the **Keyword Type Configuration** screen.

Advanced parsing is discussed in [Advanced Parsing on page 1](#).

## Appending Prefixes and/or Suffixes to Scraped Keyword Values

The **Append** tab allows you to configure a specific prefix and/or suffix to be affixed to scraped Keyword Values for the selected Keyword Type.

The screenshot shows a dialog box titled "Settings:AP PO#" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Strip", "Parse", and "Append", with "Append" being the active tab. Inside the "Append" tab, there is a text box containing the instruction: "Each append option allows you to add characters to the scraped value." Below this, there are two options, each with a checkbox and a text input field to its right. The first option is "Append to beginning" with an unchecked checkbox and an empty text field. The second option is "Append to end" with an unchecked checkbox and an empty text field. At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help".

To append a prefix or suffix:

1. Select the **Append to beginning** or **Append to end** check box(es).
2. Enter the value(s) in the field to the right of the selected check box(es).

---

**Note:** Values are case sensitive.

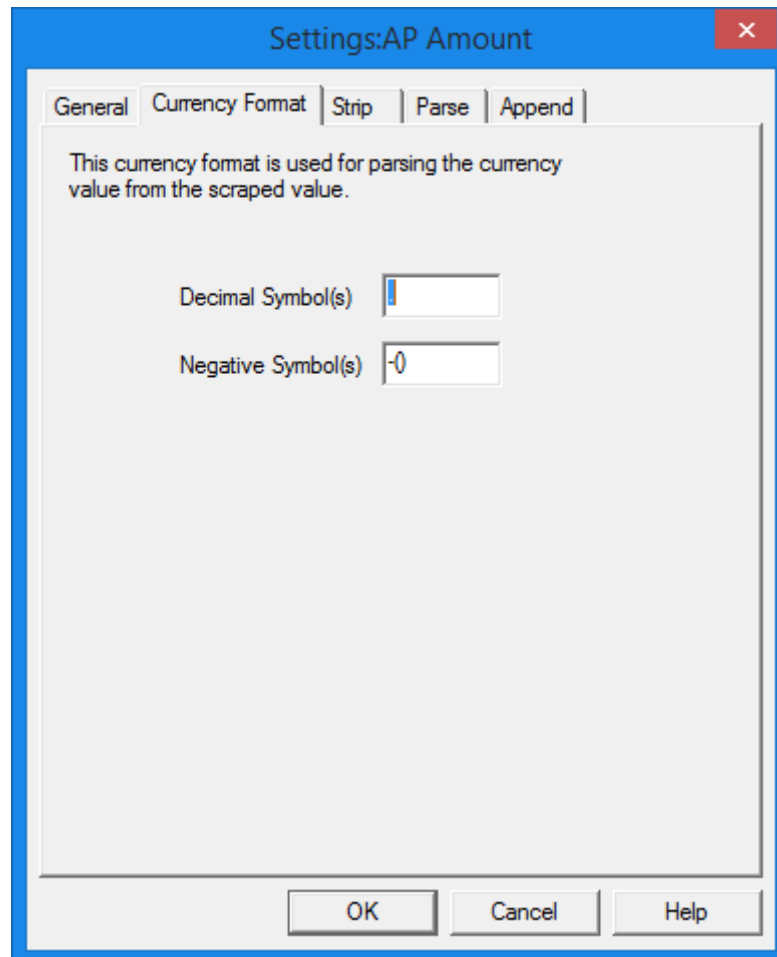
---

3. Click **OK** to return to the **Keyword Type Configuration** screen.

# Currency and Date Keyword Formatting

## Currency Keyword Formatting

For currency Keyword Types, the **Currency Format** tab is available:



In this tab, you can specify the symbol(s) to be used to separate the decimal places from the other places in values (**Decimal Symbol(s)**). You can also specify the symbol(s) to use for negative currency values (**Negative Symbol(s)**).

## Date Keyword Formatting

For date Keyword Types, the **Date Format** tab is available:

Settings:AP PO Date

General | Table | **Date Format** | Strip | Parse | Append

This date format is used for parsing all date fields out of the scraped value.

The format follows the rules for the Windows® regional date settings

Date Format:

Date Sample:

☐ Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)

OK Cancel Help

From the **Date Format** drop-down list, select the format of the date in the line-of-business application.

The following date formats are available:

Format	Example
<b>M/d/yyyy</b>	6/4/2010
<b>MM/d/yy</b>	06/4/10
<b>MM/dd/yy</b>	06/04/10
<b>MM/dd/yyyy</b>	06/04/2010
<b>yy/MM/dd</b>	10/06/04

Format	Example
yyyy-MM-dd	2010-06-04
dd-MMM-yy	04-Jun-10
MMddyy	060410
ddMMyy	040610

When a date value is scraped from the line-of-business application, the value will be converted to reflect the regional settings specified for the workstation.

If you will be scraping Umm al-Qura date values, select the **yy/mm/dd** date format and the **Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)** check box.

---

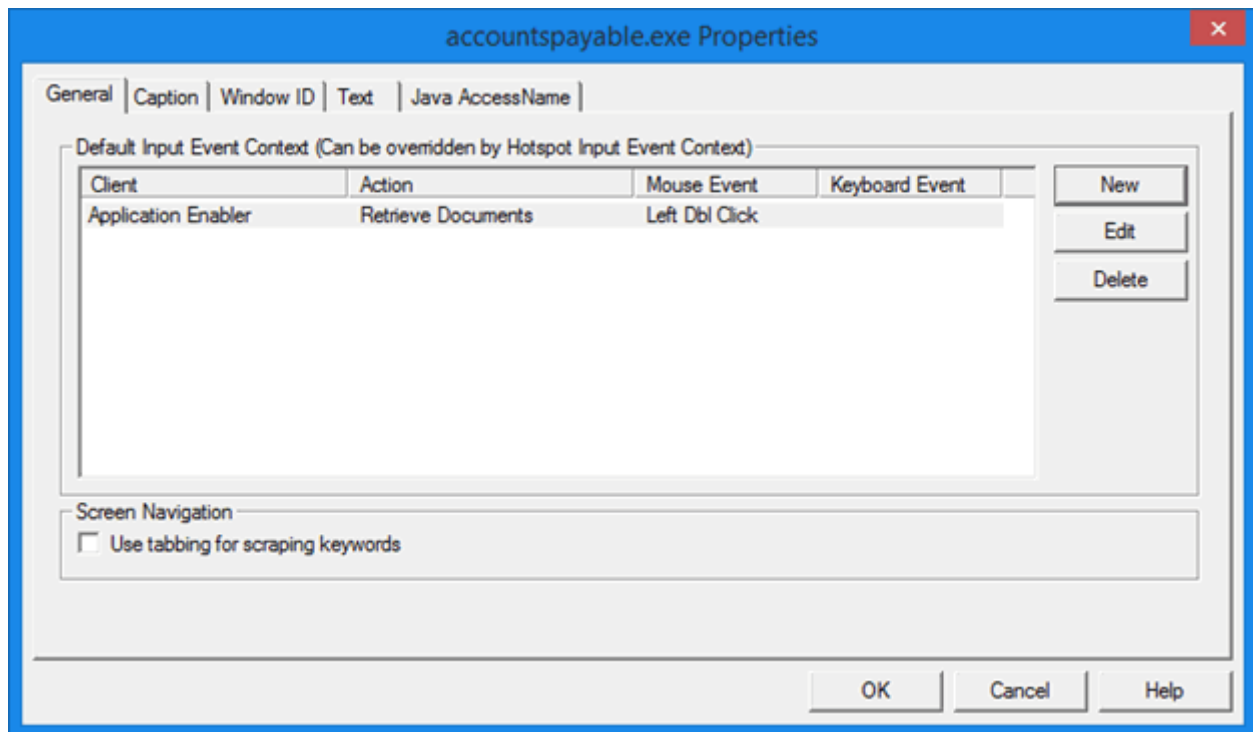
**Note:** You can only use Application Enabler contexts when scraping Umm al-Qura date values.

---

# Properties Dialog Box

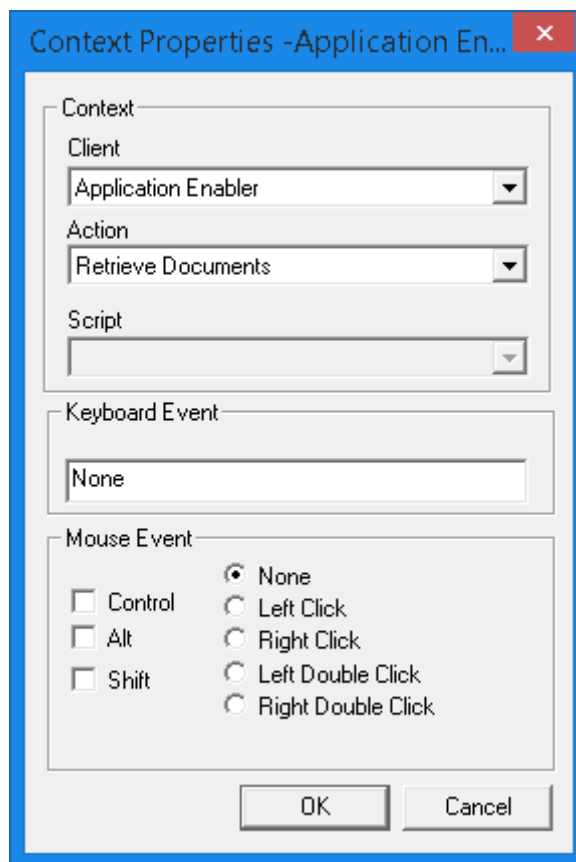
## Mouse and Keyboard Events and Contexts

The **General** tab is used to define the mouse or keyboard events used to trigger document retrieval.



**Note:** When **Desktop - Run Script** is configured as a context, the **Action** column will display the name of the VBScript.

1. To add a new mouse or keyboard event, click **New**.
2. The **Context Properties** dialog box is displayed:



3. Select the OnBase client that will be used to execute the context from the **Client** drop-down list, and the action to be executed from the **Action** drop-down list. For more information on available clients and actions, see [Using Contexts on page 288](#).
4. Depending on the action and context you have configured, you can select either a VBScript or a Unity Script to associate with the keyboard or mouse event from the **Script** drop-down list. The VBScripts and Unity Scripts that are available are those that have been configured for the database that is currently connected.
5. To define a keyboard event used to trigger a search, place your cursor in the **Keyboard Event** field and type the desired keystroke or keystroke combination. For example, press **Ctrl** and **F5** simultaneously to define **Ctrl+F5** as a keystroke combination.
6. To define a mouse event used to trigger a search, select the mouse event from the **Mouse Event** options (**Left Click**, **Right Click**, etc.). You can create a combination keystroke and click event by selecting the **Control**, **Alt**, or **Shift** options in addition to a click event.

When defining mouse events:

- It is recommended to use a keyboard key in addition to the **Left Click** and **Right Click** options. It is also recommended to not use similar mouse and keyboard events in the same application. For example, Shift+Left Click and Shift+Left Double Click.
- The **Left Double Click** and **Right Double Click** options are not supported when enabling a Java-based application.

- The **Left Double Click** and **Right Double Click** options are registered as two single mouse clicks when enabling certain Smart-Screen applications (i.e., WPF and Silverlight applications). To enable these applications, use the **Left Click** or **Right Click** options.
7. Click **OK**.
  8. If you want to use the **Tab** keyboard key to scrape values from the enabled screen, select the **Use tabbing for scraping keywords** check box.
  9. Click **OK**.

---

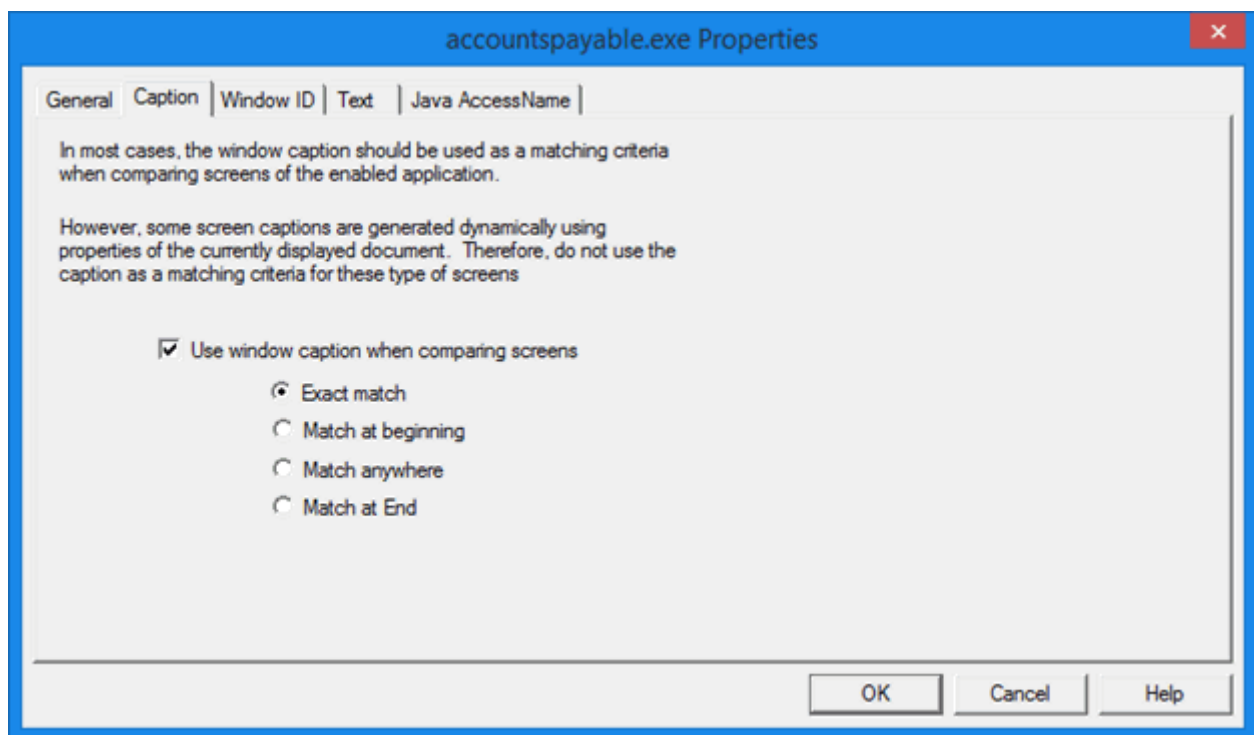
**Note:** Mouse/keyboard events can be changed after configuration by opening an existing configuration, selecting an application, clicking **Configure**, selecting a context, and clicking **Edit**.

---

## Caption

You can use the combination of Window ID and Caption to identify a screen. If both are selected, a screen must meet all of the criteria in order to be identified by Application Enabler.

You can identify a screen by its caption using the **Caption** tab:





The **Use window caption when comparing screens** option is selected by default. This is generally used when no Window ID exists. To identify the screen only by its caption:

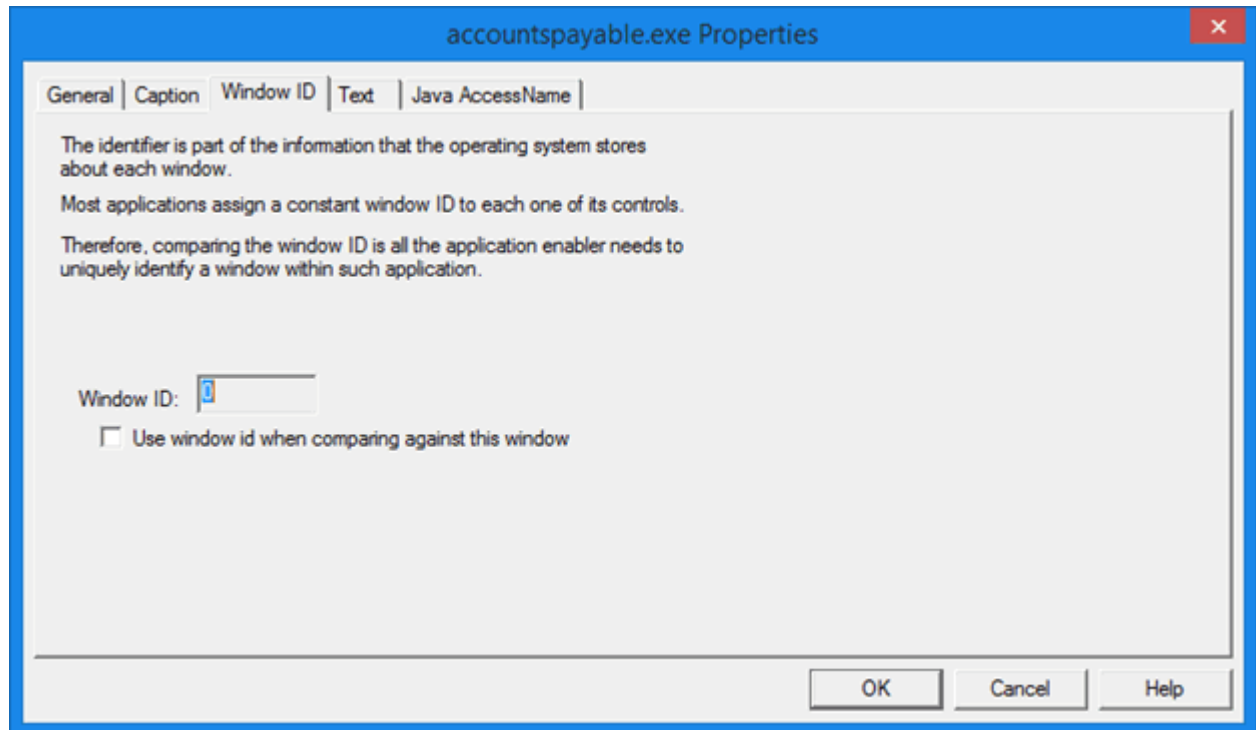
1. Clear **Use window id when comparing against this window** on the **Window ID** tab.
2. On the **Caption** tab, select the **Use window caption when comparing screens** check box and select one of the following options:

Options	Description
<b>Exact match</b>	The caption of a screen must exactly match the caption entered at the time of configuration.
<b>Match at beginning</b>	The caption of a screen must match the beginning of the caption entered at the time of configuration.
<b>Match anywhere</b>	The caption of a screen must match the caption entered at the time of configuration anywhere in the caption.
<b>Match at End</b>	The caption of a screen must match the end of the caption entered at the time of configuration.

3. Click **OK**.

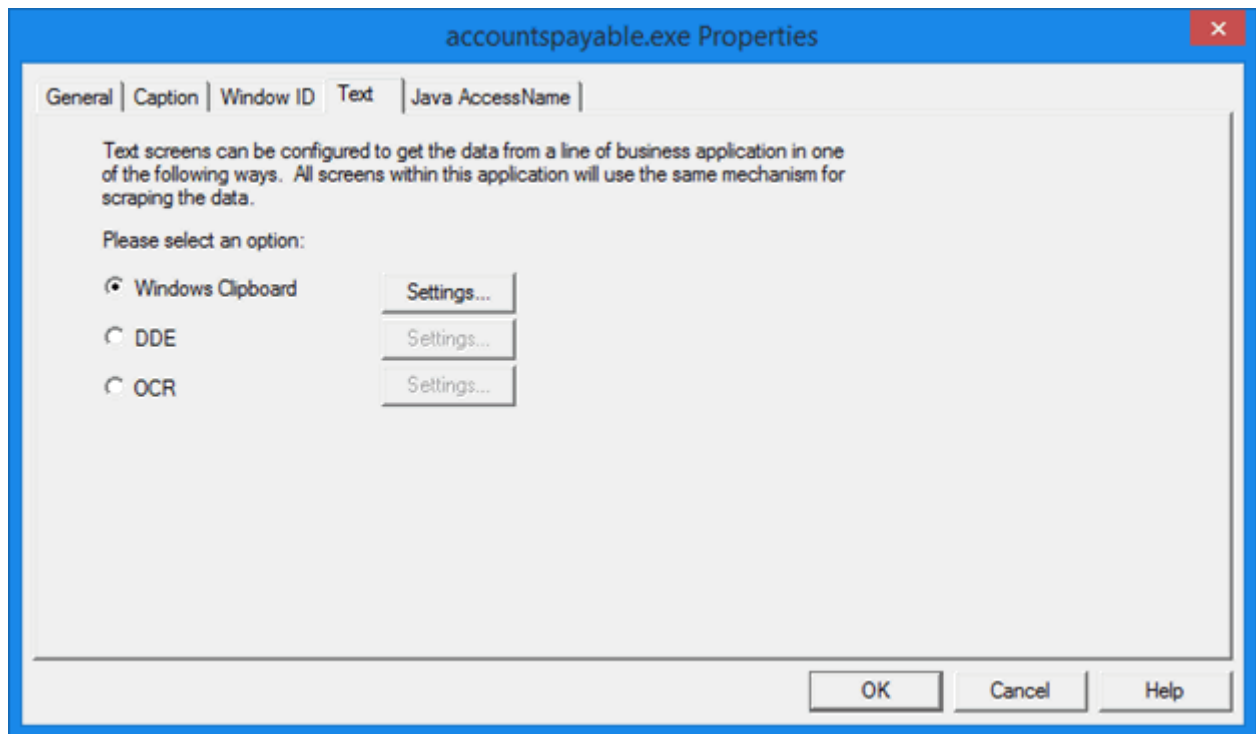
## Window ID

Application Enabler Configuration uses the Window ID as the identification of a screen. The **Use window id when comparing against this window** option must be selected on the **Window ID** tab:



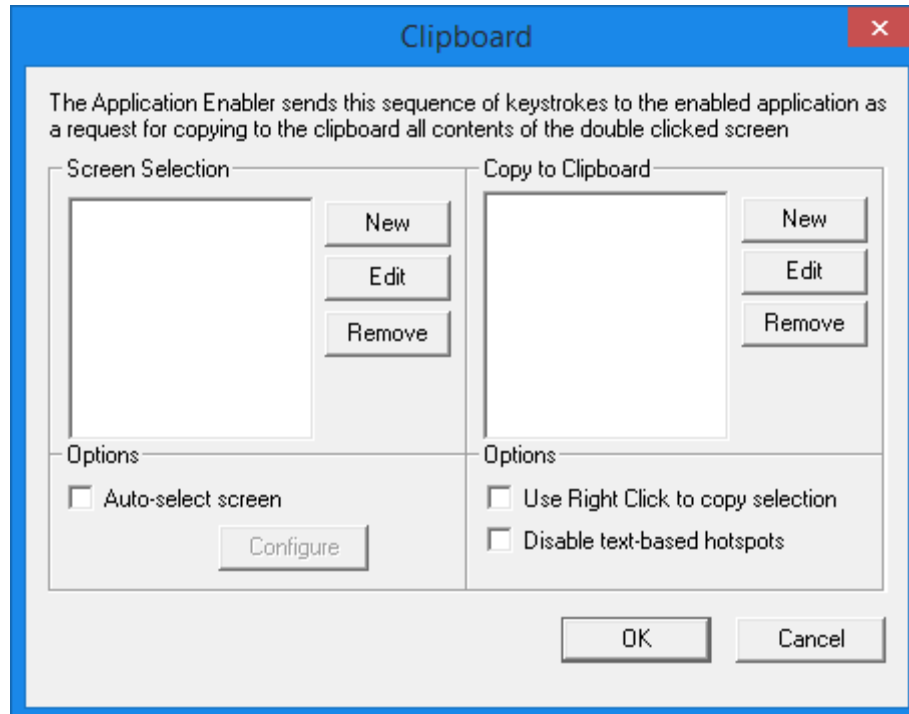
## Text

The **Text** tab is used to configure text screens.



Application Enabler supports three methods for scraping text screens. Select one of the buttons described in the following sections and click the corresponding **Settings** button to configure additional settings.

## Windows Clipboard

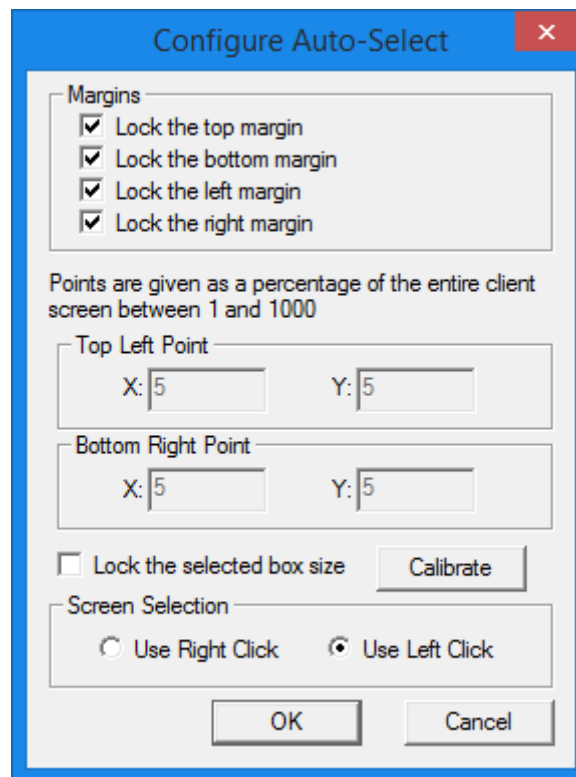


Application Enabler identifies text-based screens and screen data by the line and column location of characters on the text screen. In order to accurately map characters, Application Enabler copies each configured text screen to the Windows clipboard. The **Windows Clipboard** setting allows you to define which keystrokes are used to select a screen and copy it to the clipboard. In most cases, text-based applications will enable when the standard **CTRL + A** (select all) and **CTRL + C** (copy all) are used. Some applications may require alternate keystroke combinations.

1. Click **New**.
2. Enter the keystroke combination in the text field.
3. Click **OK**.

Some applications require automatic selection of the screen to copy text to the clipboard. In this case, select **Auto-select screen**. When this option is selected, the **Configure** button is enabled. To configure the **Auto-select screen** option:

1. Click **Configure**. The **Configure Auto-Select** dialog box is displayed.



2. Select **Lock the top margin** to keep the top margin the same size (in pixels) no matter how the client window is resized.
3. Select **Lock the bottom margin** to keep the bottom margin the same size (in pixels) no matter how the client window is resized.
4. Select **Lock the left margin** to keep the left margin the same size (in pixels) no matter how the client window is resized.
5. Select **Lock the right margin** to keep the right margin the same size (in pixels) no matter how the client window is resized.
6. Select **Lock the selected box size** to keep the box that was selected in the client screen stay the same size no matter how the client window is resized. This option can be used along with the **Lock the top margin** and **Lock the left margin** options to keep the selected area in the same place no matter how the client area is resized.
7. If you want to specify the area of an application that should be auto-selected, click **Calibrate**. This option should only be used for applications that have auto-selection enabled.

8. If you want to use the right mouse button to select the screen, select **Use Right Click**. If you want to use the left mouse button to select the screen, select **Use Left Click**.
9. On the line of business application, click and drag the mouse pointer across the client area that you want to be auto-selected. Coordinates will be populated in the point fields.

As check boxes are checked and unchecked the edit boxes for the initial and ending points become enabled. These values can be edited manually. These values are based on a percentage of the screen out of 1000.

---

**Note:** If the box is not enabled the value inside the box is not restricted to a percentage.

---

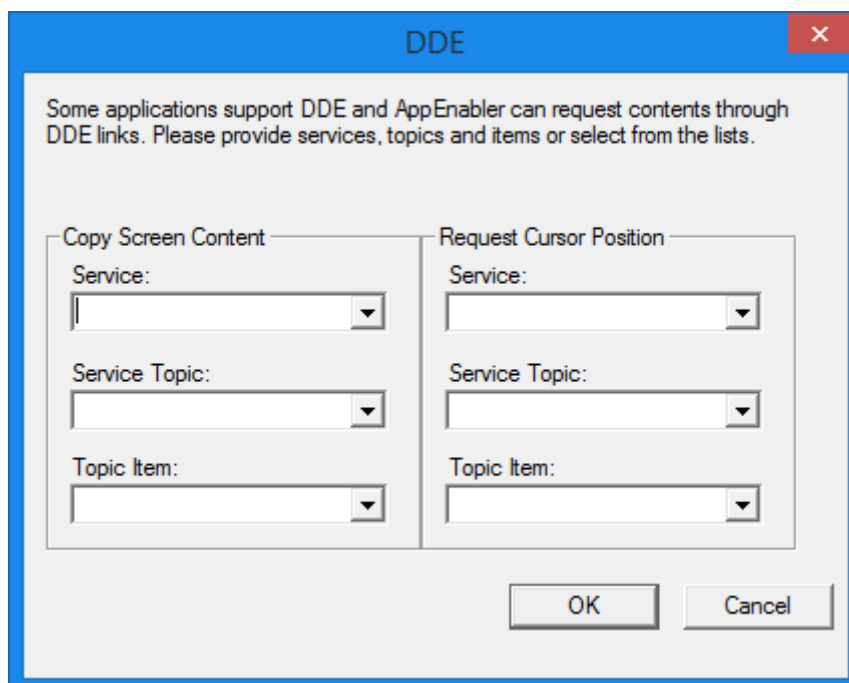
If locks are changed while in the auto-select dialog the calibrate button must be used to select the box in the client screen.

Some applications may require that you right-click to copy to the clipboard. In this case, select **Use Right Click to copy selection** to automatically trigger the right-click action when a screen is selected.

If the **Disable text-based hotspots** option is selected, scraping from text screens will be faster. It will also disable hotspots as well. This setting should be used whenever a text-based application does not require using hotspots. This option is disabled by default.

Click **OK** when you have completed configuration.

## DDE



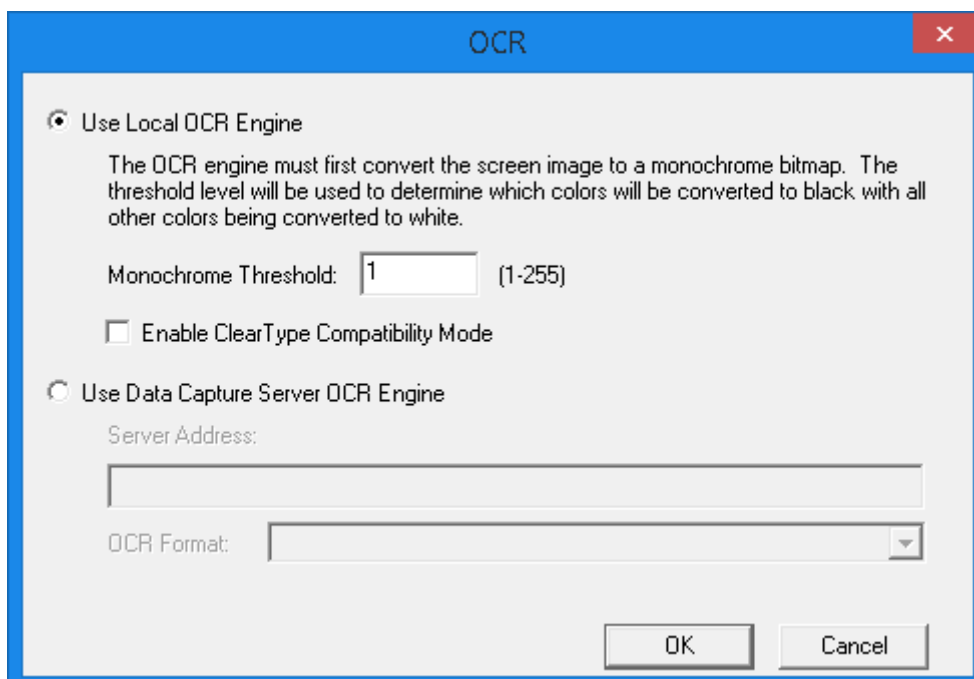
The screenshot shows a dialog box titled "DDE" with a blue header bar and a red close button. The main content area has a light gray background and contains the following text: "Some applications support DDE and AppEnabler can request contents through DDE links. Please provide services, topics and items or select from the lists." Below this text are two side-by-side panels. The left panel is titled "Copy Screen Content" and the right panel is titled "Request Cursor Position". Each panel contains three dropdown menus: "Service:", "Service Topic:", and "Topic Item:". At the bottom of the dialog are two buttons: "OK" and "Cancel".

The **DDE** setting should be used for text-based applications that do not communicate with the clipboard. DDE is the preferred method to use with text-based applications. DDE should be used and only if this fails should the clipboard method be used. In order to configure the DDE tab, you need to know the **Service**, **Service Topic**, and **Topic Item** for screen contents and cursor positions. These may be listed in the drop-down lists; otherwise, check server references and input manually.

Another use for the DDE setting is if you want to configure multiple hotspots on a text-based application that could potentially have the same value. Without the use of the DDE setting, the first instance of the value scraped would be used. Using the DDE option can help identify where on the screen the value was scraped from.

Click **OK** when you have completed configuration.

## OCR



The OCR configuration dialog box has a blue title bar with the text "OCR" and a red close button. It contains two radio button options. The first option, "Use Local OCR Engine", is selected. Below it is a text box for "Monochrome Threshold" with the value "1" and a range "(1-255)". There is also an unchecked checkbox for "Enable ClearType Compatibility Mode". The second option, "Use Data Capture Server OCR Engine", is unselected. Below it is a text box for "Server Address:" and a dropdown menu for "OCR Format:". At the bottom right are "OK" and "Cancel" buttons.

OCR

☒ Use Local OCR Engine

The OCR engine must first convert the screen image to a monochrome bitmap. The threshold level will be used to determine which colors will be converted to black with all other colors being converted to white.

Monochrome Threshold:  (1-255)

☐ Enable ClearType Compatibility Mode

☐ Use Data Capture Server OCR Engine

Server Address:

OCR Format:

OK Cancel

The **OCR** setting must be used if you are configuring Application Enabler to use OCR with this application.

1. Select which OCR engine should be used.
  - To use the native OCR engine, select **Use Local OCR Engine**.
  - To use the Data Capture Server OCR engine, select **Use Data Capture Server OCR Engine**.

---

**Note:** Select **Enable ClearType Compatibility Mode** or use the Data Capture Server OCR engine if the application you are enabling uses ClearType fonts.

---

**Note:** Additional licensing and configuration is required in order to use the Data Capture Server for OCR processing. See [Data Capture Server on page 326](#) for information.

---

2. If you selected **Use Local OCR Engine**, configure the **Monochrome Threshold** value, if necessary. The Monochrome Threshold value is internally used by the local OCR engine. For most applications, the default value of **1** will be sufficient. Modify this value only when the default value does not work for the screens in your application.
3. If you selected **Use Local OCR Engine**, and the application you are enabling uses ClearType fonts, select **Enable ClearType Compatibility Mode**.
4. If you selected **Use Data Capture Server OCR Engine**, configure the following settings:
  - **Server Address** - Enter the server address for the Data Capture Server. The server address must be the net.tcp address to the Data Capture Server, for example:  
`net.tcp://localhost:9050/Hyland.DataCapture.ServiceManager/service`
  - **OCR Format** - Select the OCR format to be used.

---

**Note:** For information on configuring OCR formats, refer to the **Full-Page OCR** module reference guide.

---

5. Click **OK** when you have completed configuration.

## Save and Close

Save the configuration by clicking **Save**. After saving the current configuration, Application Enabler Configuration automatically performs a health check of the configuration file. This health check helps identify configurations that may be invalid.

For example, if you configure a retrieval or indexing context but do not configure a Document Type, you will be prompted that your configuration may be invalid.

Any health check warnings that are presented are saved to a text file in the same location as the XML configuration file. This file is named **[name of XML configuration file].xml.warning.txt**.

Be sure that the directory that you save the configuration file in is available to all users that will need to use Application Enabler in conjunction with the enabled application. Click **Save**.

---

**Note:** A single Application Enabler configuration file is limited to 30 enabled applications.

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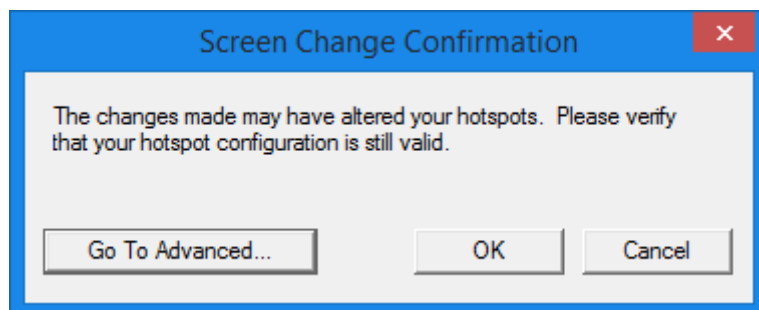


## Opening Existing Configurations

Refresh Application Enabler by closing and restarting the application. Open the configuration file by selecting **Load Configuration** in Application Enabler. Enable the event capturing process and test your configuration to ensure that it retrieves the desired documents.

## Editing Existing Configurations

When you change an existing configuration file, changes made may affect existing hotspot configuration. When a configuration change may have affected a hotspot configuration, the following dialog box is displayed.



Click **OK** to continue with the configuration.

Click **Go To Advanced** to go to the **Hotspots Configuration** dialog box to confirm the configuration changes are correct.

Click **Cancel**, to cancel your changes.

## Limitations When Enabling Drop-Down Lists, Radio Buttons, and Check Box Fields

### Drop-Down Lists

When enabling drop-down lists within an HTML application, there are the following limitations:

- When using multiple selection drop-down lists, Application Enabler will only read the first selection and ignore the other selections.
- In order for Application Enabler to read the drop-down list, the HTML code for the drop-down list select must contain either a name= attribute, id= attribute, or both.

- An example of a drop-down list is the following:  

```
<select id="colorsid" name="colorname" MULTIPLE="TRUE" >  
<option value="red_value">Red</option>  
<option value="blue_value">Blue</option>  
<option value="green_value">Green</option>  
<option value="orange_value">Orange</option>  
</select>
```

Red is the selected color upon scraping.

In this example, if the user selects the **Return HTML instead of text value (for scripting)** check box, the HTML value returned will be red\_value. If they do not select the **Return HTML instead of text value (for scripting)** check box, Red will be returned.

## Radio Buttons

When enabling radio buttons within an HTML application, there are the following limitations:

- The `<input type="radio">` tag needs to have either a `name=` or an `id=` attribute for Application Enabler to be able to scrape values.
- Application Enabler scrapes the HTML value, regardless of the **Return HTML instead of text value (for scripting)** check box setting.

## Check Boxes

When enabling check boxes within an HTML application, there are the following limitations:

- The `<input type="checkbox">` tag needs to have either a `name=` or an `id=` attribute for Application Enabler to be able to scrape values.
- Application Enabler scrapes the HTML value, regardless of the **Return HTML instead of text value (for scripting)** check box setting.

# Enabling Java-Based Applications

## Configuration Overview for Java-Based Applications

The Java configuration process creates links between Java-based line-of-business application data fields and OnBase Keyword Types. After opening Application Enabler Configuration, create links by doing the following. A detailed description of each step is included in this manual.

1. Open the line-of-business application to enable. See [Open the Line-of-Business Application on page 205](#).
2. Create links between line-of-business application fields and Document Types and Keyword Types. See [Create Links Between Line-of-Business Application Screens/Fields and System Keywords on page 205](#).
  - Create a new Java screen configuration in Application Enabler Configuration.
  - Identify the Java screen to enable.
  - If no **Name** is displayed on the **General** section, click **View Window Info Tree** and find the 'parent' of the control you are going to use. See [View Java Info Tree on page 208](#).
3. Log on to OnBase. You have access to the only those documents for which you have been granted rights. See [Logging on to OnBase on page 209](#).
  - Select the Document Types to be retrieved when on the line-of-business application screen. See [Select Document Types on page 210](#).
4. Establish a link between the OnBase Keyword Types, Unity Form fields, or WorkView attributes to a location on the line-of-business application screen. See [Associating Keyword Types, Unity Form Fields, or WorkView Attributes on page 211](#).
  - Click **Settings** to access formatting options. Select the appropriate stripping options to eliminate unwanted characters or spaces. Appropriate formatting options are available for date or currency. See [Settings on page 217](#).

---

**Note:** The formatting options on the **Strip**, **Parse**, and **Append** tabs can work in conjunction with one another. Formatting options are applied sequentially, such that options on the **Strip** tab are applied first, followed by options on the **Parse** tab, and then by options on the **Append** tab. Options on these tabs are also applied sequentially, from the top of the tab to the bottom of the tab.

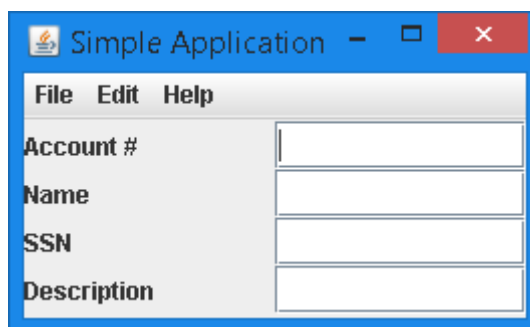
---

5. Configure properties. See [Properties Dialog Box on page 227](#).
  - Choose the mouse and/or keyboard event that triggers retrieval.
6. Save your configuration. See [Save and Close on page 238](#).
7. Optionally, configure hotspots. See [Configuring Hotspots on page 277](#).

## Step by Step Configuration

### Open the Line-of-Business Application

Open the line-of-business application you want to enable. An example application is shown below.



### Create Links Between Line-of-Business Application Screens/Fields and System Keywords

In order to create links with the line-of-business application you will:

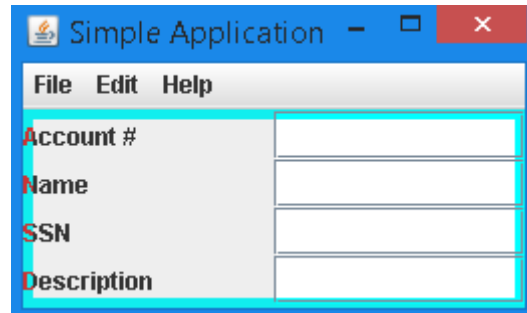
1. Identify each line-of-business application screen to enable. A line-of-business application screen is a single window of information. Line-of-business applications can have many screens. You can enable one or many screens.
2. Identify, or map, each line-of-business application form field and its related keyword in OnBase. Line-of-business application screens can be composed of configurable form fields, non-configurable text and other components.
3. Select keywords used for retrieval.
4. Identify optional hotspots. Hotspots allow you to retrieve OnBase documents based on values in a single line-of-business application field. If hotspots are not configured, documents are retrieved based on the value of all fields configured for the screen.

### Create a New Java Screen Configuration

Open your line-of-business application and ensure that the screen you wish to enable is visible and can be selected with a single mouse click.

To begin enabling an application:

1. In Application Enabler Configuration, click **New Java-Screen** or the **Configure a new Java screen** toolbar button.
2. As you move the mouse across the line-of-business application, areas of your screen are highlighted by a selection box, which encloses the area selected for capture. Place your mouse over the line-of-business application you wish to enable. Move your mouse until the selection box encloses the entire line-of-business application screen and click to select it. It is possible (but not necessarily desirable) to select individual line-of-business application form fields (i.e. text boxes), in which case the selection box encloses the form field.



3. Application Enabler Configuration extracts the name of the line-of-business application screen and displays the **Settings** screen shown below. In some cases the line-of-business application name may not appear as you wish. Rename the screen by replacing the default name provided in the **Name** field.

The screenshot shows the 'Settings' dialog box with a blue title bar and a red close button. The dialog is divided into three main sections: 'General', 'Screen Identification Elements', and 'Mapping Rules'. In the 'General' section, the 'Screen Name' field contains 'Simple Application'. Below it are 'Screen Details' and 'View Java Info Tree' buttons. The 'Screen Identification Elements' section contains a table with columns 'Path to Screen', 'Role', and 'Value', and buttons for 'New', 'Edit', and 'Remove'. The 'Mapping Rules' section contains a text description and a 'Configure Mapping Rules' button. At the bottom are '< Back', 'Next >', 'Cancel', and 'Help' buttons.

Path to Screen	Role	Value
----------------	------	-------

4. If necessary, you can further identify the screen by adding **Screen Identification Elements**. Click **New** and select the screen element that you want to use for screen identification. You can change a selected screen identification element by clicking **Edit**. You can delete a selected screen identification element by clicking **Remove**.
5. Click **Configure Mapping Rules** and clear the **Use window order when comparing against this screen** option, which is selected by default.
6. Click **OK**.
7. Click **Next**.

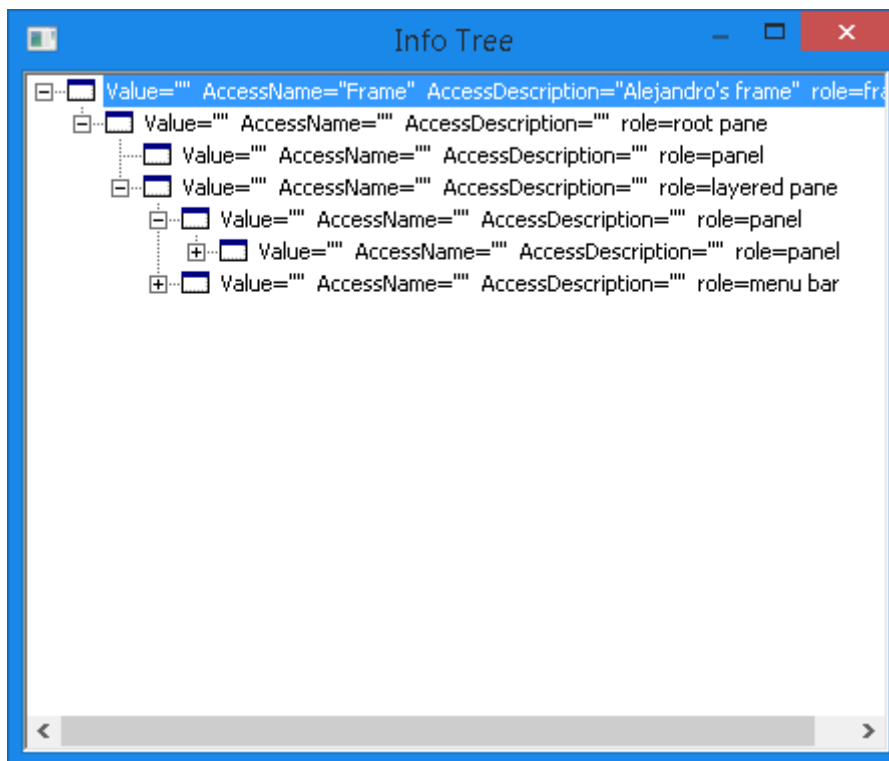
---

**Caution:** If you change the text in the **Caption** field and you are using the caption to identify the screen, the screen may not be identified correctly for your configuration. If this occurs, you must reconfigure the enabled application to reflect the changed caption text.

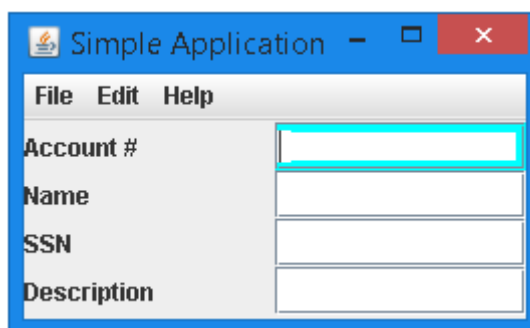
---

## View Java Info Tree

By clicking the **View Java Info Tree** button in the **Settings** dialog box, you are able to access the **Info Tree** dialog box. This dialog box contains the following information for the application and the application's fields: **AccessName**, **AccessDescription**, and **role**. This information can be helpful during configuration. This dialog box allows you to identify specific elements within an application. To identify any element, right-click on any item and select **Highlight**.



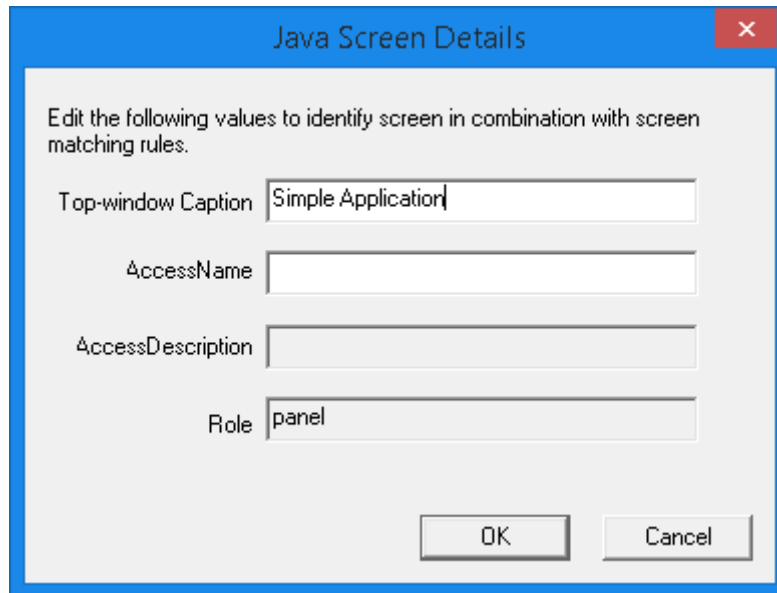
A black box flashes four times around the element, represented by the selected item, in the enabled application.



Also, you can select the window or field you wish to enable from the **Info Tree** dialog box by right-clicking on the item you wish to enable and selecting **Use Selected as Window**. The window or field you selected will be the enabled control in your configuration used to gather user input in the enabled application.

In some instances you may want to edit the information which is used to identify a screen. The need for editing depends on the application being enabled and the required mapping rules. To change identification information:

1. Click **Screen Details**. The **Java Screen Details** dialog box is displayed.

The image shows a dialog box titled "Java Screen Details" with a blue header bar and a red close button in the top right corner. The main area has a light gray background and contains the text "Edit the following values to identify screen in combination with screen matching rules." Below this text are four text input fields: "Top-window Caption" (containing "Simple Application"), "AccessName" (empty), "AccessDescription" (empty), and "Role" (containing "panel"). At the bottom right of the dialog are two buttons: "OK" and "Cancel".

2. Edit the **Top-window Caption** and/or the **AccessName** field(s) appropriately.
3. Click **OK**.

---

**Note:** The **AccessDescription** and **Role** fields are only informational fields. They cannot be edited.

---

## Logging on to OnBase

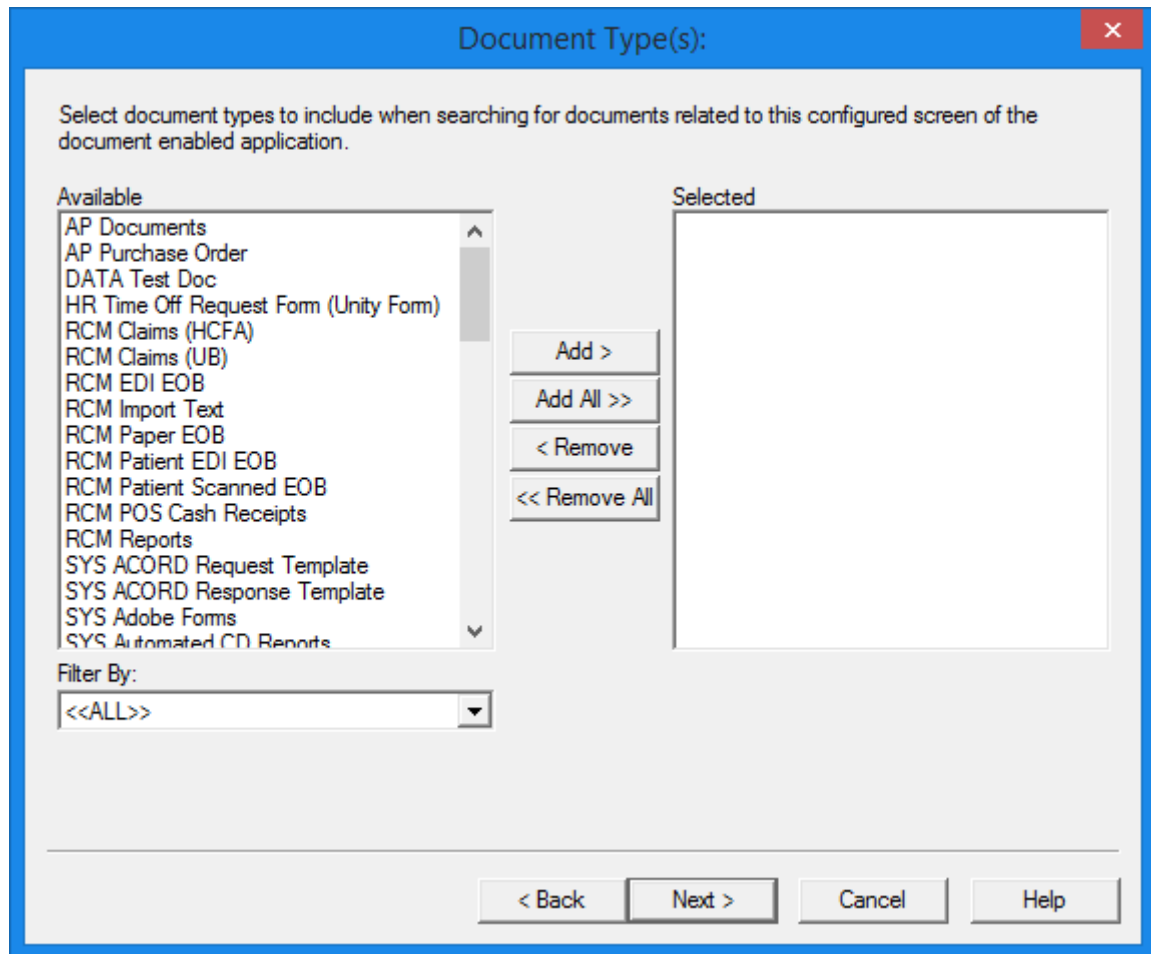
If you are not currently connected to OnBase, a window opens and prompts you to log on.

1. Select the appropriate data source from the drop-down list. This drop-down list is only displayed when multiple data sources are available.
2. Type your OnBase user name.
3. Type your OnBase password.
4. Click **Login** to log on, or click **Cancel** to close the dialog without logging on.



## Select Document Types

The **Document Type(s)** dialog box is displayed:



1. Select the Document Types to search when retrieving OnBase documents through the line-of-business application. If you want to display all documents related to a screen, select all the Document Types that a user could possibly need from this screen. If you want to display only documents most relevant to a screen, select only the Document Types that most closely relate to the screen. Cross-referencing can be used to find other less closely related documents. Hold down the **Ctrl** key while selecting Document Types to select multiple Document Types that are not consecutively listed. Hold down the **Shift** key while selecting Document Types to select multiple Document Types that are consecutively listed.

---

**Note:** A Document Type is not required if you are configuring Healthcare Module Keyword Types or WorkView attributes.

---

2. Select one or multiple (using the Ctrl or Shift keys) Document Types from the **Available** list and click **Add** to add them to the **Selected** list. To add all Document Types, click **Add All**.  
To remove one or multiple (using the Ctrl or Shift keys) Document Types from the **Selected** list, select the Document Type(s) and click **Remove**. To remove all Document Types, click **Remove All**.
3. To filter available Document Types by Document Type Group, select a Document Type Group from the **Filter By** drop-down list.
4. Click **Next** to continue.

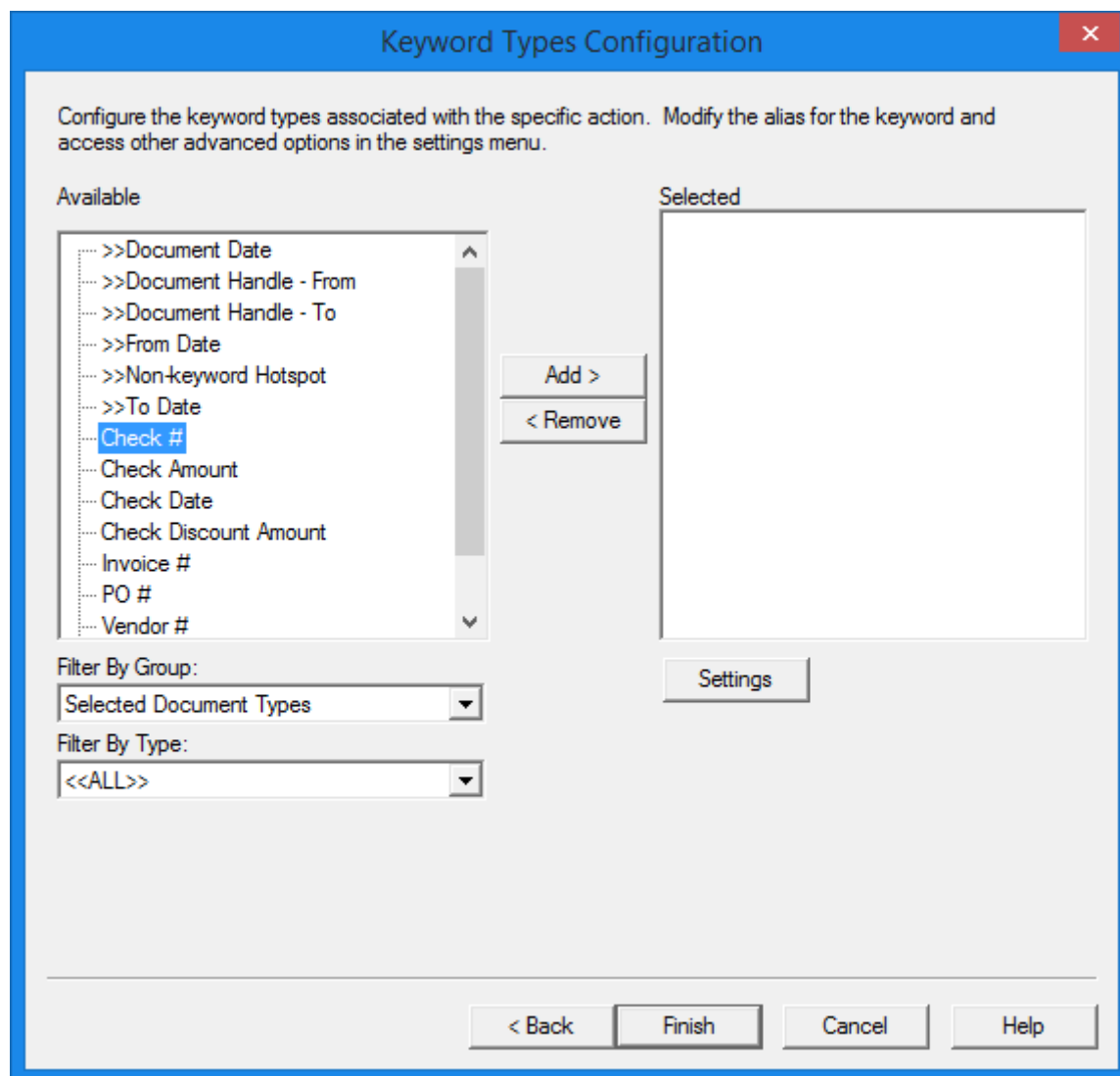
## Associating Keyword Types, Unity Form Fields, or WorkView Attributes

---

**Caution:** Specific Currency Keyword Types are not currently supported for use with Application Enabler.

---

After selecting Document Types, the **Keyword Types Configuration** dialog box is displayed.



This screen allows you to associate Keyword Types, Unity Form fields, or WorkView attributes with the configured screen.

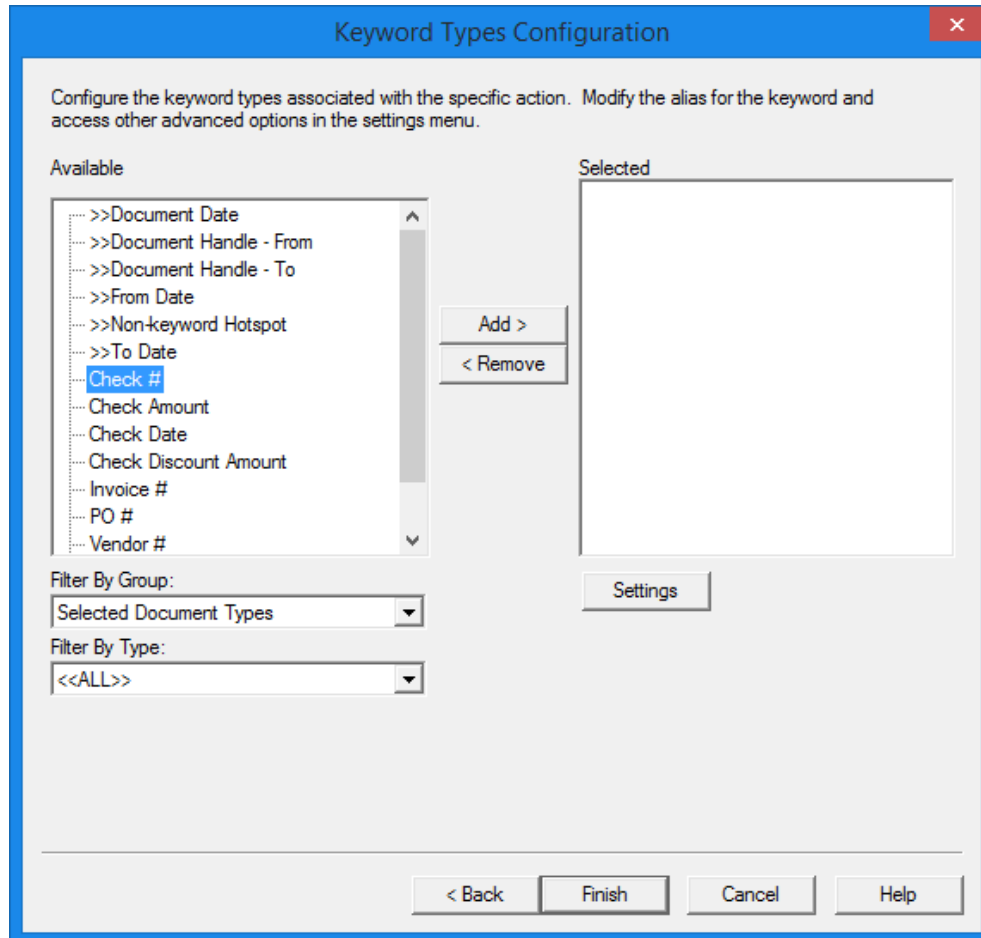
You can filter the **Available** list using the **Filter By Group** and **Filter By Type** drop-down lists. These two drop-down lists work together to narrow down the items that are displayed for easy selection and configuration. The **Filter By Group** drop-down list includes the following:

Filter By Group	Description
<b>Combined View Types</b>	When selected, the <b>Available</b> list displays any Combined View Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen. The <b>Filter By Type</b> drop-down list contains the available Combined View Types.

Filter By Group	Description
<b>Government Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase government module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the <b>Plan Review</b> selection, which is for the Electronic Plan Review module.</p>
<b>Healthcare Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase healthcare module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the following OnBase healthcare modules:</p> <ul style="list-style-type: none"> <li>• DeficiencyPop</li> <li>• RAC Audit</li> <li>• Patient Window</li> </ul> <hr/> <p><b>Note:</b> The ChartPop, DeficiencyPop, and LongitudinalPop options are maintained for legacy purposes only. For new medical deployments, please use the OnBase Patient Window.</p> <hr/>
<b>Selected Document Types</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen.</p> <p>The <b>Filter By Type</b> drop-down list contains the Document Types that were selected on the <b>Document Type(s):</b> screen.</p>
<b>Unity Form Templates</b>	<p>When selected, the <b>Available</b> list displays any Unity Form fields associated with the Unity Form template selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of Unity Form templates.</p>
<b>Workview App</b>	<p>When selected, the <b>Available</b> list displays any WorkView attributes associated with the WorkView class that is selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of WorkView classes.</p> <hr/> <p><b>Note:</b> The following WorkView attribute Data Types are not supported for use with Application Enabler, and are not displayed during configuration: Text, Formatted Text, Document, Date/Time. External classes are not supported for use with Application Enabler. Multiple level relationships (for example, AssignedEmployee.Manager.FullName) are also not supported.</p> <hr/>

1. If you are configuring a Keyword Type, select the Keyword Type in the **Available** list and click **Add**.

Keyword Types that are mapped to system properties are available for configuration. See >>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date on page 215 for more information.



If you are configuring a Unity Form, select Unity Form fields in the **Available** list and click **Add**.

If you are configuring a WorkView attribute, select the attribute in the **Available** list and click **Add**. Nested attributes are displayed with a + symbol.

2. The Application Enabler Configuration selection box is enabled. Move your mouse until the selection box encloses the line-of-business application field you wish to associate.

---

**Note:** Multiple fields can be mapped to a single Keyword Type. To map another field to a Keyword Type, complete the above steps. When a new field is mapped to a keyword that already is mapped to a field, the keyword name is followed by an incremental number in parenthesis, used to distinguish between the different mapped fields. Example: The second mapping of the Vendor Name Keyword Type to a field results in a Keyword Type name of Vendor Name (01). The third mapping results in a Keyword Type name of Vendor Name (02).

---



---

**Note:** WorkView attributes, Unity Form fields, and module-specific Keyword Types can only be mapped to a field once.

---

3. Click **Next** to continue.

>>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date

The >>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date Keyword Type selections have distinct purposes.

Keyword Type	Description
>>Document Date	<p>Allows you to map to the Document Date of a document during indexing.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Date Keyword Type is not respected by all Application Enabler contexts. For more information, see <a href="#">Using Contexts on page 288</a>.</p> <hr/>

Keyword Type	Description
>>Document Handle - From	<p>Allows you to map to the <b>From</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b>, and <b>Application Enabler - Retrieve in Workflow</b> contexts, or generate document packets with the <b>Application Enabler - Generate Document Packets</b> context.</p> <p>To retrieve using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Retrieve Documents</b> and <b>Application Enabler - Retrieve in Workflow</b> will only retrieve the single Document Handle that matches the scraped value.</p> <p>To generate a document packet using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Generate Document Packets</b> will only generate the packet for that single Document Handle that matches the scraped value.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - From Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/> <p><b>Note:</b> When using the &gt;&gt;Document Handle - From Keyword Type with the <b>Application Enabler - Retrieve in Workflow</b> context, all other keywords that are passed in will be ignored.</p> <hr/> <p><b>Note:</b> In order for document retrieval to function as expected when using the <b>Document Handle</b> system keyword, the <b>Retrieve by Document Handle / File Name</b> product right must be assigned to the user's user group in the OnBase Configuration module.</p> <hr/>
>>Document Handle - To	<p>Allows you to map to the <b>To</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b> context.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - To Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/>
>>From Date	<p>Allows you to map to the <b>From</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

Keyword Type	Description
>>Non-keyword Hotspot	Allows you to map a hotspot to any screen element without mapping the element to a Keyword Type. This will allow a screen scrape to be initiated from any element on the screen. For example, using this selection, the hotspot could be mapped to a button on the screen that is not associated with a Keyword Value.
>>To Date	<p>Allows you to map to the <b>To</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

## Settings

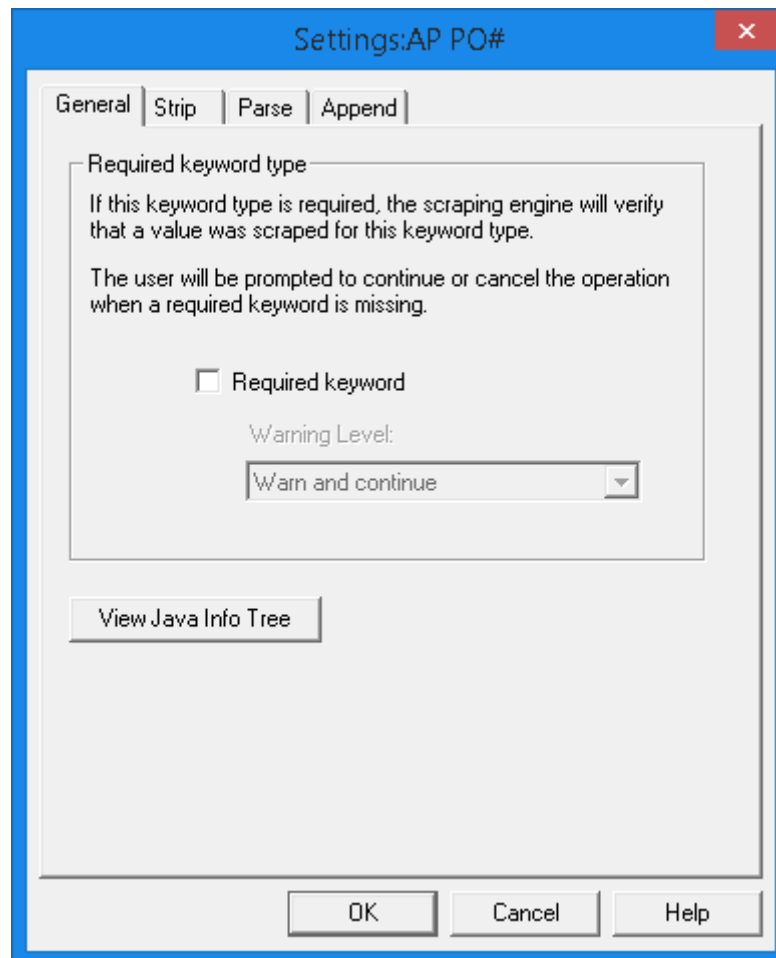
The **Settings** dialog box is opened by clicking the **Settings** button on the **Keyword Types Configuration** screen. Available settings are described in the following sections:

- [Setting a Keyword as Required on page 218](#)
- [Character Stripping on page 219](#)
- [Parsing on page 221](#)
- [Appending Prefixes and/or Suffixes to Scraped Keyword Values on page 223](#)
- [Currency Keyword Formatting on page 224](#)
- [Date Keyword Formatting on page 225](#)



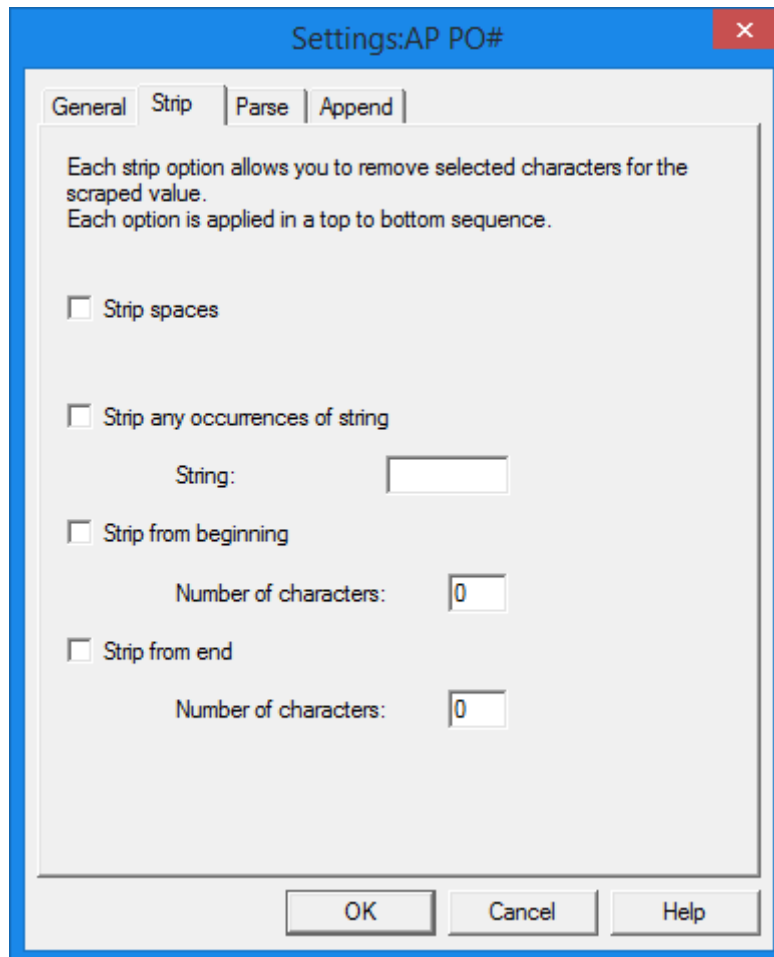
## Setting a Keyword as Required

The **General** tab allows you to set a Keyword Type as a required keyword. To make a keyword required, select the **Required keyword** check box. You can select either **Warn and continue** or **Warn and cancel** from the drop-down list to determine if you want users to be able to continue a query that does not specify a value for a required keyword. You can also click the **View Java Info Tree** button to access the **Info Tree** dialog box. This dialog box can be used to identify fields to map to Keyword Types. See [View Java Info Tree on page 208](#) for further information.



## Character Stripping

If you wish to retrieve documents based on a subset of characters within a value, you can configure Application Enabler to "strip" characters to exclude from the search using the **Strip** tab. For example, if a line-of-business application field contains a full phone number and you wish to retrieve OnBase documents based on area code, configure character stripping to remove all characters but the area code from the line-of-business application field.



The sequence of operation is from the top down. Application Enabler first strips spaces (if checked) then strips characters (if checked) and so on.

The following settings are available on the **Strip** tab:

Setting	Description
<b>Strip spaces</b>	Select <b>Strip spaces</b> to remove all spaces from the line-of-business application value, regardless of the location of the spaces. For example, if <b>Strip spaces</b> is selected, double-clicking on a properly configured line-of-business application field containing <b>2_2___16_44___</b> (where _ represents a space) will return OnBase documents with the Keyword Value <b>221644</b> .
<b>Strip any occurrences of string</b>	Select <b>Strip any occurrences of string</b> to strip all occurrences of a specific character from the line-of-business application value, regardless of the location of the character within the value. Enter the character you wish to strip in the <b>String</b> field. This option could be used to strip all dashes from a Social Security Number or an account number.  <b>Note:</b> Values are case sensitive.
<b>Strip from beginning</b>	Select <b>Strip from beginning</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the beginning of a value. For example, <b>Strip 5 Characters from Beginning</b> could be used to strip 3-digit area code enclosed in parentheses (###) from a telephone number.
<b>Strip from end</b>	Select <b>Strip from end</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the end of a value.

When your selection is complete, click **OK** to return to the **Keyword Types Configuration** screen. Define character-stripping options for each keyword that requires character stripping. Click **Next** to continue configuring Application Enabler.

## Parsing

The **Parse** tab allows you to extract characters and words from scraped values within the enabled application:

Settings:AP PO#

General | Strip | **Parse** | Append

Each parse option allows you to extract characters from the scraped value. Each option is applied in a top to bottom sequence.

☐ Extract from beginning

Starting position: 1

Number of characters: 1

☐ Extract from end

Starting position: 1

Number of characters: 1

☐ Word extraction

Starting position: 1

Number of words: 1

Separators:

☐ Increment word count after each separator

☐ Count words from the end

When parsing, Application Enabler attempts to find characters at the configured **Starting position**. Spaces are excluded from the configured **Number of characters**. For example, the **Starting position** is 1 and the **Number of characters** is 10. Application Enabler starts at 1, but encounters 8 spaces before a numeric character. In this example, Application Enabler excludes the 8 spaces from the **Number of characters** count, and the numeric character becomes the first of the 10 characters that Application Enabler will extract for the Keyword Value.

To extract characters starting at the beginning of a line:

1. Select the **Extract from beginning** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the Keyword Value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract characters starting at the end of a line:

1. Select the **Extract from end** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the keyword value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract words:

1. Select the **Word extraction** check box.
2. Enter the word number where the words that are to be extracted start in the **Starting position** field.
3. Enter the number of words you want to extract from the keyword value in the **Number of words** field.
4. Enter the character that separates the words in the **Separators** field. If you want to use a tab as a separator, click the **Insert Tab** button. A tab will be placed in the field.

---

**Note:** The default separator character is a space. Multiple characters can be entered into the field. Only one character can be used at one time and the character used must come from the list of characters entered into the **Separators** field. You must delete the space character from the field if you do not want to use spaces as separators.

---

5. If you want to account for blank values that may exist between separators, select the **Increment word count after each separator** option. This option will ensure that the number of values corresponds with the number of separators.
6. If you want to begin counting words from the end of the line, select the **Count words from the end** option.

---

**Note:** If **Count words from the end** is selected, Application Enabler will count back the specified number of words, and then extract the set number of words forward from that point.

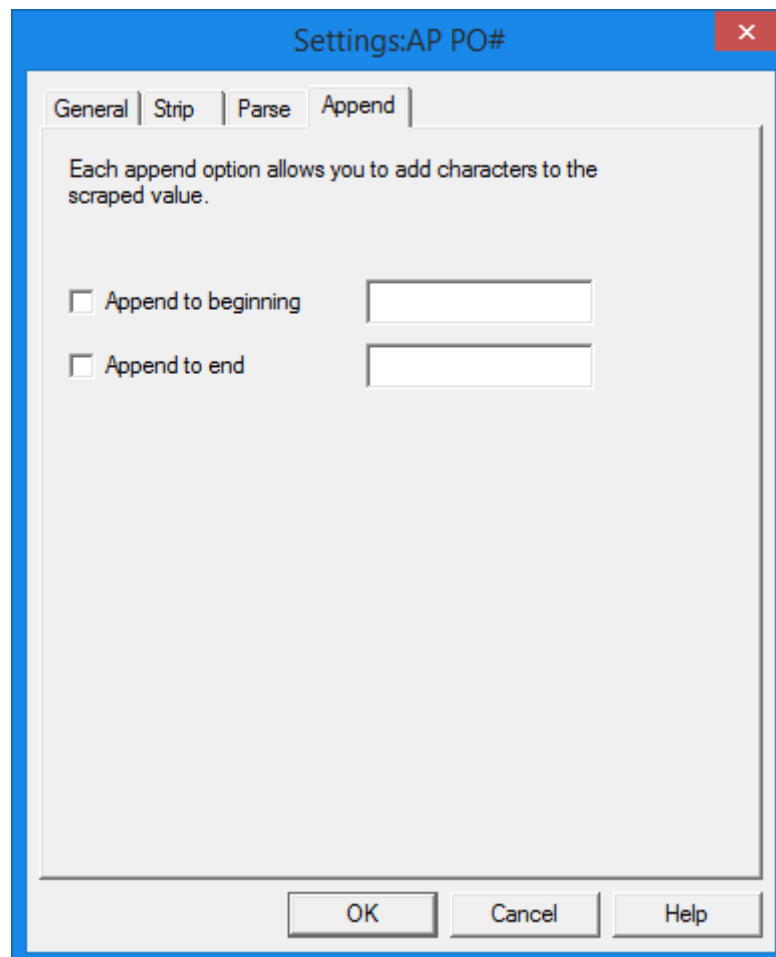
---

7. Click **OK** to return to the **Keyword Type Configuration** screen.

Advanced parsing is discussed in [Advanced Parsing on page 1](#).

## Appending Prefixes and/or Suffixes to Scraped Keyword Values

The **Append** tab allows you to configure a specific prefix and/or suffix to be affixed to scraped Keyword Values for the selected Keyword Type.



Settings:AP PO#

General | Strip | Parse | **Append**

Each append option allows you to add characters to the scraped value.

☐ Append to beginning

☐ Append to end

OK Cancel Help

To append a prefix or suffix:

1. Select the **Append to beginning** or **Append to end** check box(es).
2. Enter the value(s) in the field to the right of the selected check box(es).

---

**Note:** Values are case sensitive.

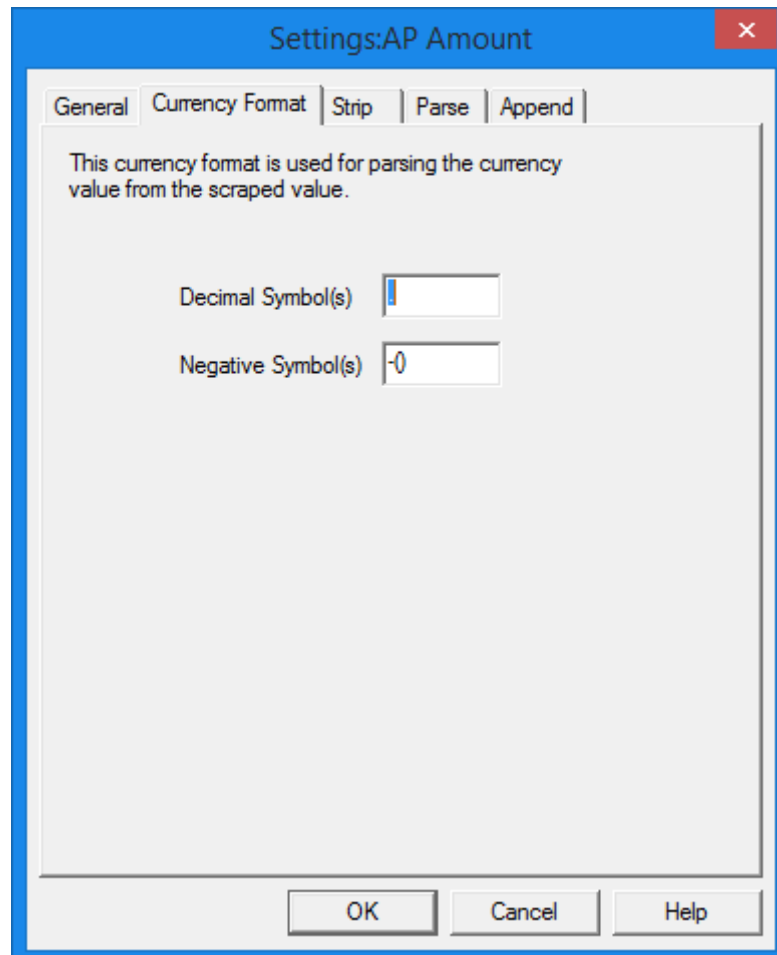
---

3. Click **OK** to return to the **Keyword Type Configuration** screen.

## Currency and Date Keyword Formatting

### Currency Keyword Formatting

For currency Keyword Types, the **Currency Format** tab is available:



In this tab, you can specify the symbol(s) to be used to separate the decimal places from the other places in values (**Decimal Symbol(s)**). You can also specify the symbol(s) to use for negative currency values (**Negative Symbol(s)**).

## Date Keyword Formatting

For date Keyword Types, the **Date Format** tab is available:

Settings:AP PO Date

General | Table | **Date Format** | Strip | Parse | Append

This date format is used for parsing all date fields out of the scraped value.

The format follows the rules for the Windows® regional date settings

Date Format:

Date Sample:

☐ Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)

OK Cancel Help

From the **Date Format** drop-down list, select the format of the date in the line-of-business application.

The following date formats are available:

Format	Example
<b>M/d/yyyy</b>	6/4/2010
<b>MM/d/yy</b>	06/4/10
<b>MM/dd/yy</b>	06/04/10
<b>MM/dd/yyyy</b>	06/04/2010
<b>yy/MM/dd</b>	10/06/04



Format	Example
yyyy-MM-dd	2010-06-04
dd-MMM-yy	04-Jun-10
MMddyy	060410
ddMMyy	040610

When a date value is scraped from the line-of-business application, the value will be converted to reflect the regional settings specified for the workstation.

If you will be scraping Umm al-Qura date values, select the **yy/mm/dd** date format and the **Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)** check box.

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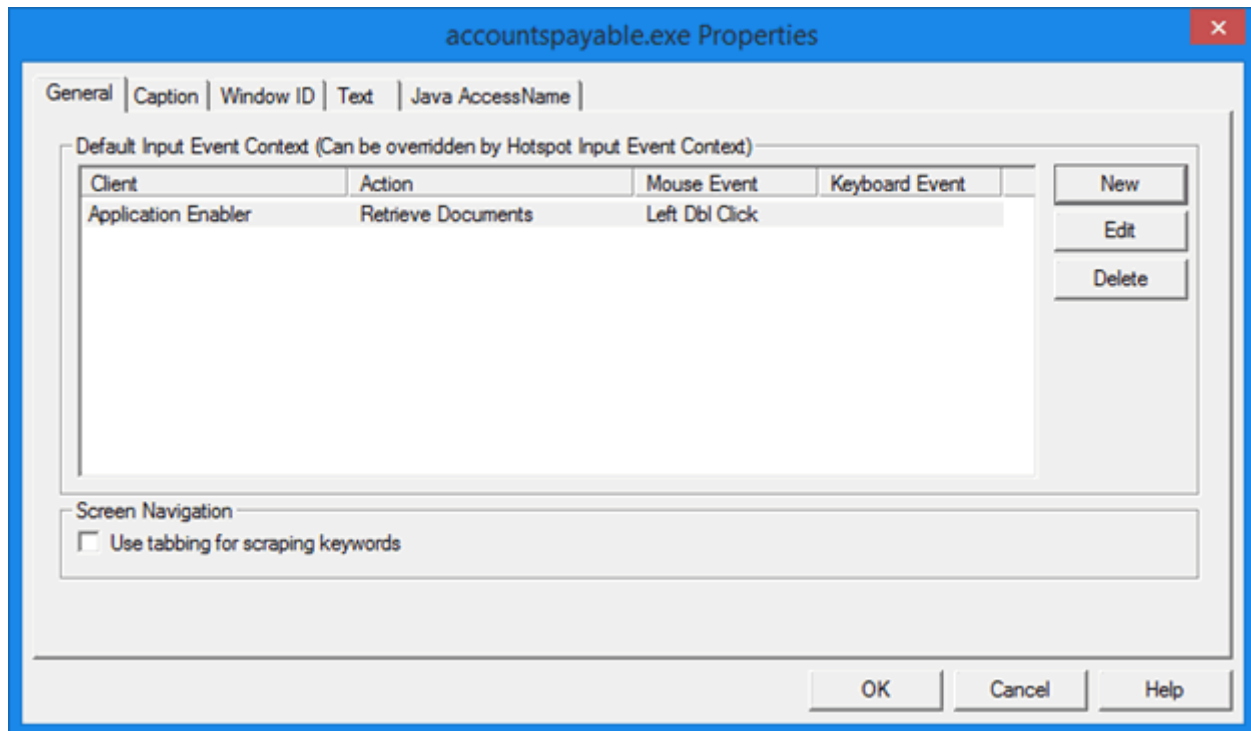
**Note:** You can only use Application Enabler contexts when scraping Umm al-Qura date values.

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## Properties Dialog Box

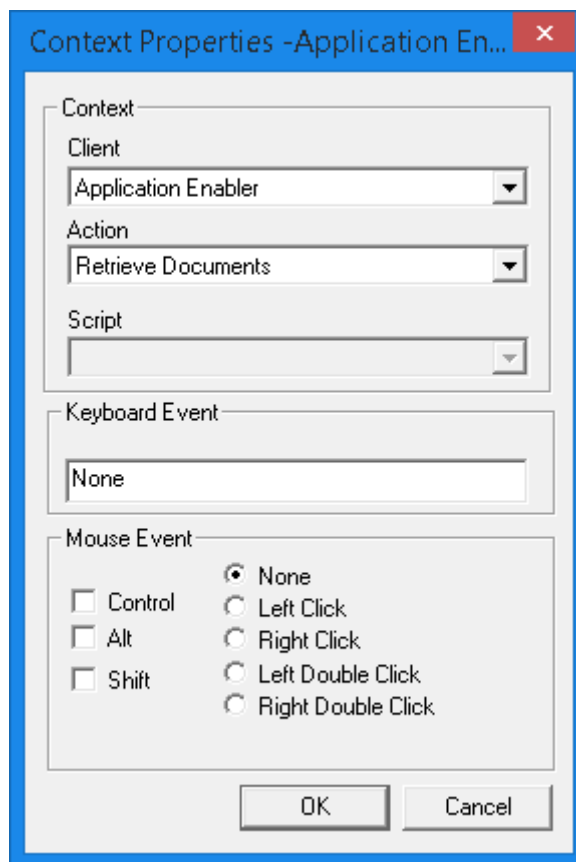
### Mouse and Keyboard Events and Contexts

The **General** tab is used to define the mouse or keyboard events used to trigger document retrieval.



**Note:** When **Desktop - Run Script** is configured as a context, the **Action** column will display the name of the VBScript.

1. To add a new mouse or keyboard event, click **New**.
2. The **Context Properties** dialog box is displayed:



3. Select the OnBase client that will be used to execute the context from the **Client** drop-down list, and the action to be executed from the **Action** drop-down list. For more information on available clients and actions, see [Using Contexts on page 288](#).
4. Depending on the action and context you have configured, you can select either a VBScript or a Unity Script to associate with the keyboard or mouse event from the **Script** drop-down list. The VBScripts and Unity Scripts that are available are those that have been configured for the database that is currently connected.
5. To define a keyboard event used to trigger a search, place your cursor in the **Keyboard Event** field and type the desired keystroke or keystroke combination. For example, press **Ctrl** and **F5** simultaneously to define **Ctrl+F5** as a keystroke combination.
6. To define a mouse event used to trigger a search, select the mouse event from the **Mouse Event** options (**Left Click**, **Right Click**, etc.). You can create a combination keystroke and click event by selecting the **Control**, **Alt**, or **Shift** options in addition to a click event.

When defining mouse events:

- It is recommended to use a keyboard key in addition to the **Left Click** and **Right Click** options. It is also recommended to not use similar mouse and keyboard events in the same application. For example, Shift+Left Click and Shift+Left Double Click.
- The **Left Double Click** and **Right Double Click** options are not supported when enabling a Java-based application.

- The **Left Double Click** and **Right Double Click** options are registered as two single mouse clicks when enabling certain Smart-Screen applications (i.e., WPF and Silverlight applications). To enable these applications, use the **Left Click** or **Right Click** options.
7. Click **OK**.
  8. If you want to use the **Tab** keyboard key to scrape values from the enabled screen, select the **Use tabbing for scraping keywords** check box.
  9. Click **OK**.

---

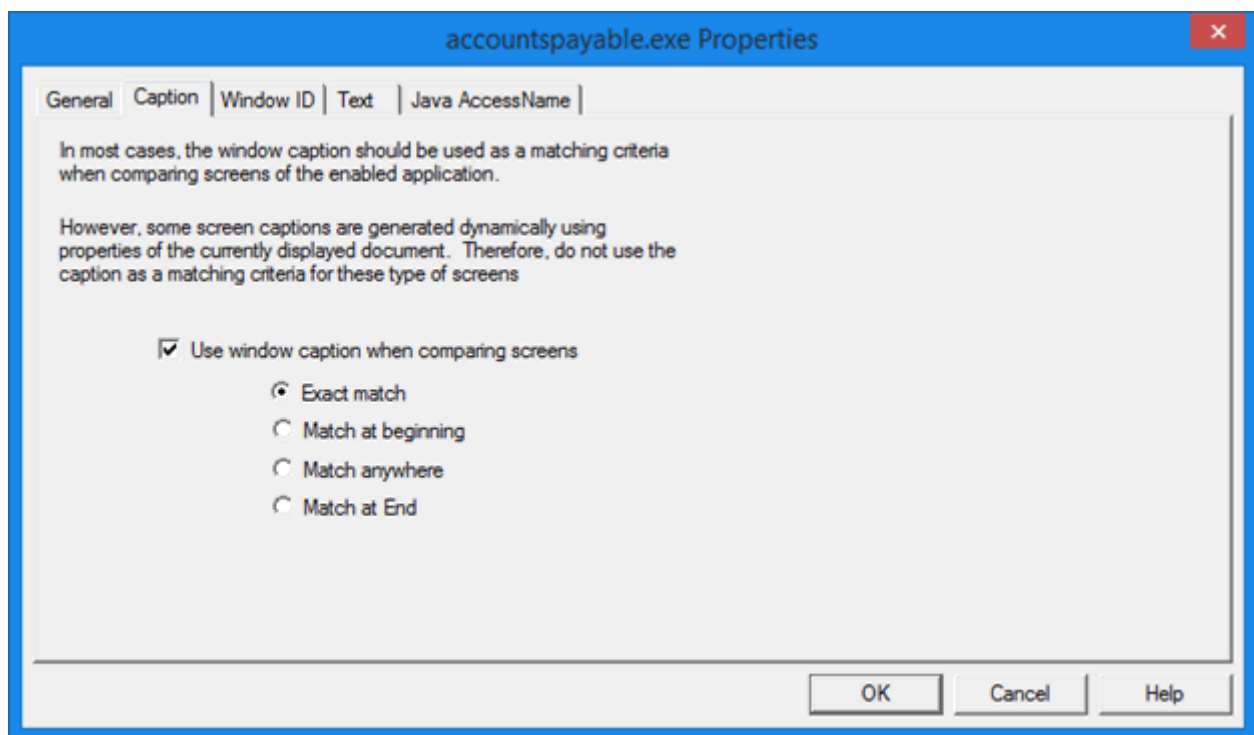
**Note:** Mouse/keyboard events can be changed after configuration by opening an existing configuration, selecting an application, clicking **Configure**, selecting a context, and clicking **Edit**.

---

## Caption

You can use the combination of Window ID and Caption to identify a screen. If both are selected, a screen must meet all of the criteria in order to be identified by Application Enabler.

You can identify a screen by its caption using the **Caption** tab:



The **Use window caption when comparing screens** option is selected by default. This is generally used when no Window ID exists. To identify the screen only by its caption:

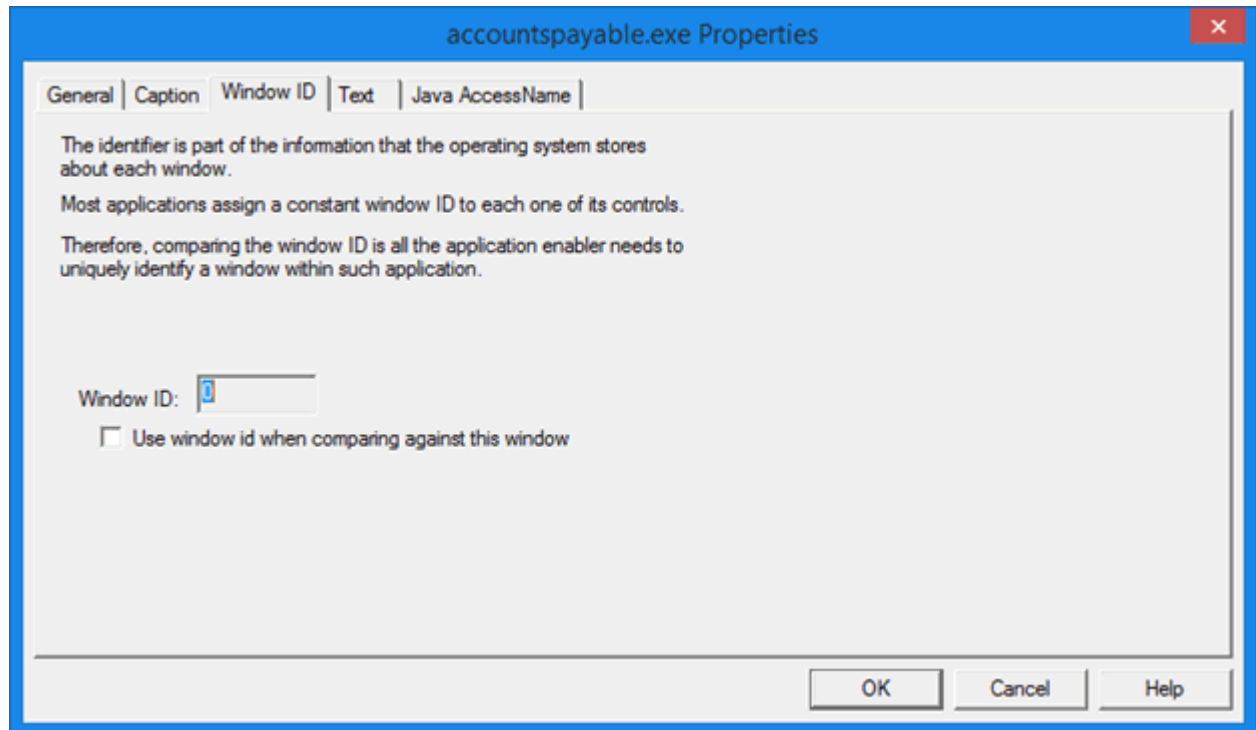
1. Clear **Use window id when comparing against this window** on the **Window ID** tab.
2. On the **Caption** tab, select the **Use window caption when comparing screens** check box and select one of the following options:

Options	Description
<b>Exact match</b>	The caption of a screen must exactly match the caption entered at the time of configuration.
<b>Match at beginning</b>	The caption of a screen must match the beginning of the caption entered at the time of configuration.
<b>Match anywhere</b>	The caption of a screen must match the caption entered at the time of configuration anywhere in the caption.
<b>Match at End</b>	The caption of a screen must match the end of the caption entered at the time of configuration.

3. Click **OK**.

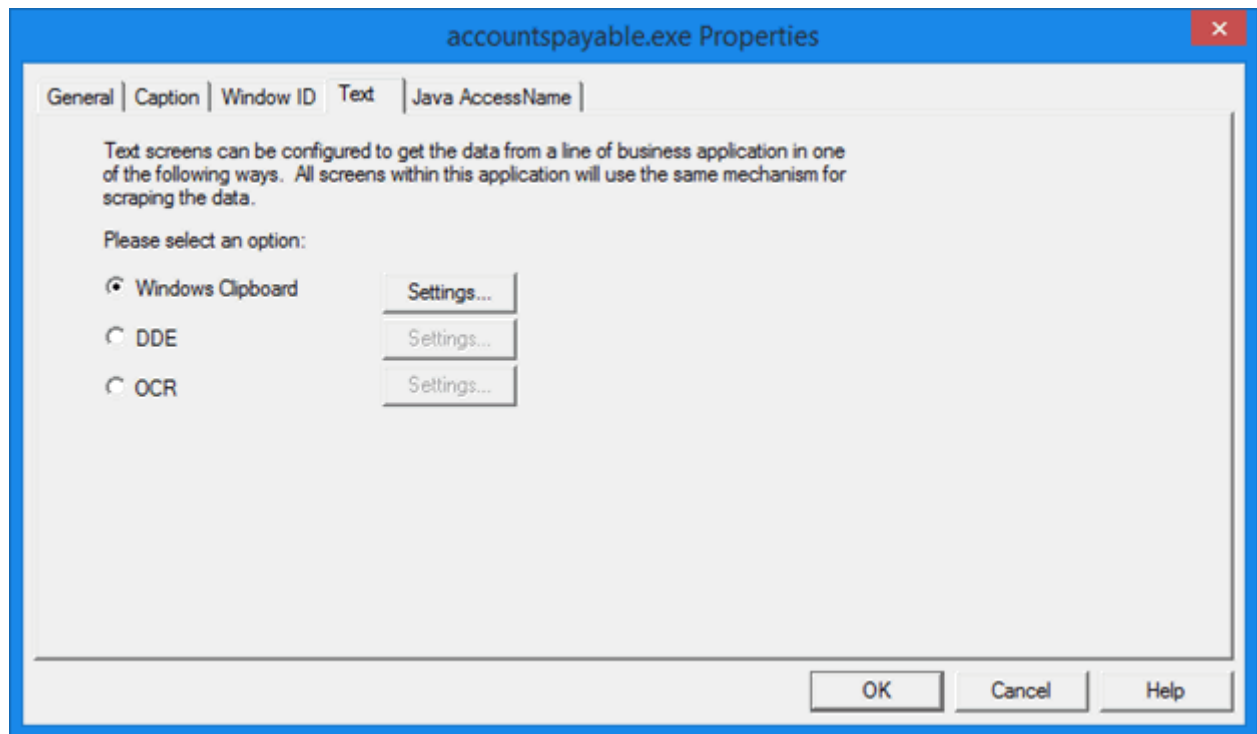
## Window ID

Application Enabler Configuration uses the Window ID as the identification of a screen. The **Use window id when comparing against this window** option must be selected on the **Window ID** tab:



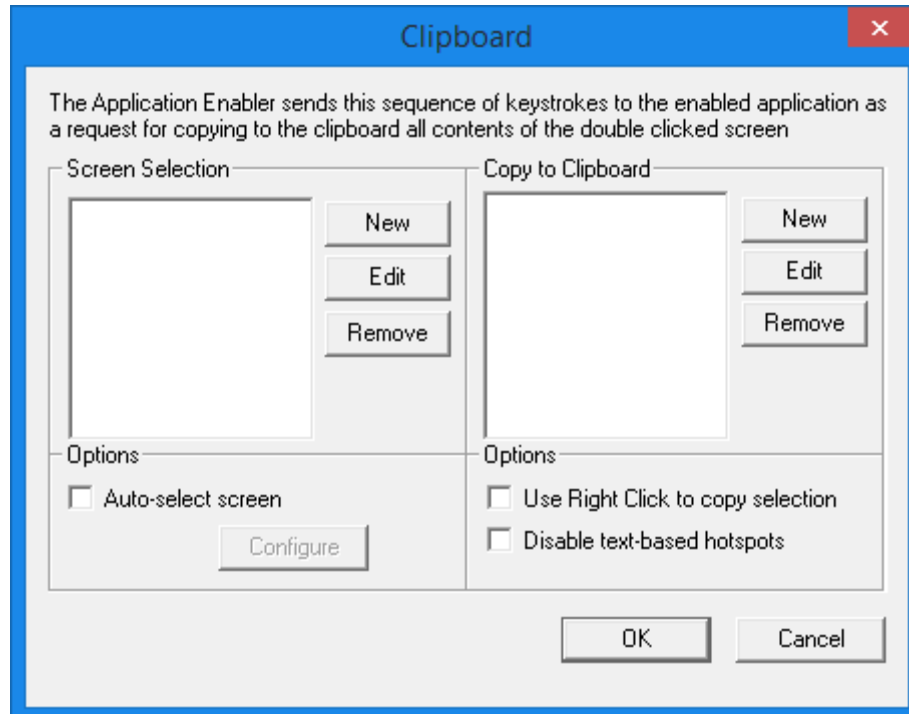
## Text

The **Text** tab is used to configure text screens.



Application Enabler supports three methods for scraping text screens. Select one of the buttons described in the following sections and click the corresponding **Settings** button to configure additional settings.

## Windows Clipboard



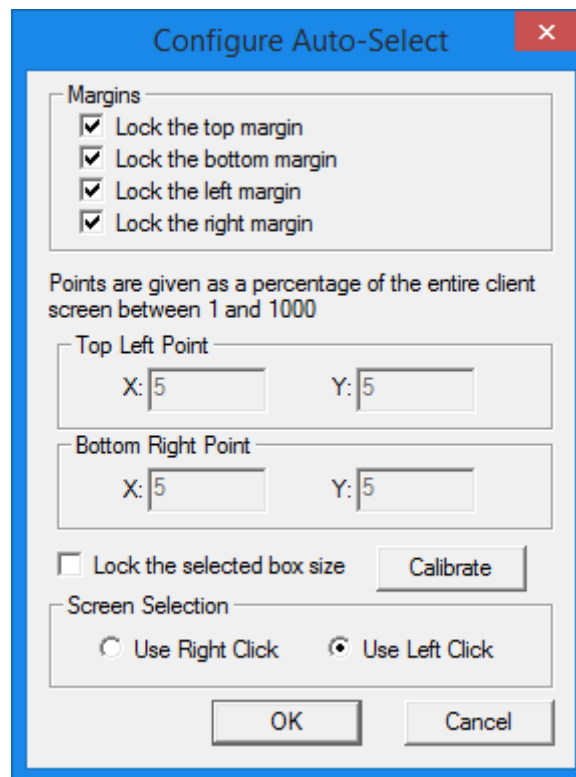
Application Enabler identifies text-based screens and screen data by the line and column location of characters on the text screen. In order to accurately map characters, Application Enabler copies each configured text screen to the Windows clipboard. The **Windows Clipboard** setting allows you to define which keystrokes are used to select a screen and copy it to the clipboard. In most cases, text-based applications will enable when the standard **CTRL + A** (select all) and **CTRL + C** (copy all) are used. Some applications may require alternate keystroke combinations.

1. Click **New**.
2. Enter the keystroke combination in the text field.
3. Click **OK**.



Some applications require automatic selection of the screen to copy text to the clipboard. In this case, select **Auto-select screen**. When this option is selected, the **Configure** button is enabled. To configure the **Auto-select screen** option:

1. Click **Configure**. The **Configure Auto-Select** dialog box is displayed.



2. Select **Lock the top margin** to keep the top margin the same size (in pixels) no matter how the client window is resized.
3. Select **Lock the bottom margin** to keep the bottom margin the same size (in pixels) no matter how the client window is resized.
4. Select **Lock the left margin** to keep the left margin the same size (in pixels) no matter how the client window is resized.
5. Select **Lock the right margin** to keep the right margin the same size (in pixels) no matter how the client window is resized.
6. Select **Lock the selected box size** to keep the box that was selected in the client screen stay the same size no matter how the client window is resized. This option can be used along with the **Lock the top margin** and **Lock the left margin** options to keep the selected area in the same place no matter how the client area is resized.
7. If you want to specify the area of an application that should be auto-selected, click **Calibrate**. This option should only be used for applications that have auto-selection enabled.

8. If you want to use the right mouse button to select the screen, select **Use Right Click**. If you want to use the left mouse button to select the screen, select **Use Left Click**.
9. On the line of business application, click and drag the mouse pointer across the client area that you want to be auto-selected. Coordinates will be populated in the point fields.

As check boxes are checked and unchecked the edit boxes for the initial and ending points become enabled. These values can be edited manually. These values are based on a percentage of the screen out of 1000.

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**Note:** If the box is not enabled the value inside the box is not restricted to a percentage.

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If locks are changed while in the auto-select dialog the calibrate button must be used to select the box in the client screen.

Some applications may require that you right-click to copy to the clipboard. In this case, select **Use Right Click to copy selection** to automatically trigger the right-click action when a screen is selected.

If the **Disable text-based hotspots** option is selected, scraping from text screens will be faster. It will also disable hotspots as well. This setting should be used whenever a text-based application does not require using hotspots. This option is disabled by default.

Click **OK** when you have completed configuration.

## DDE

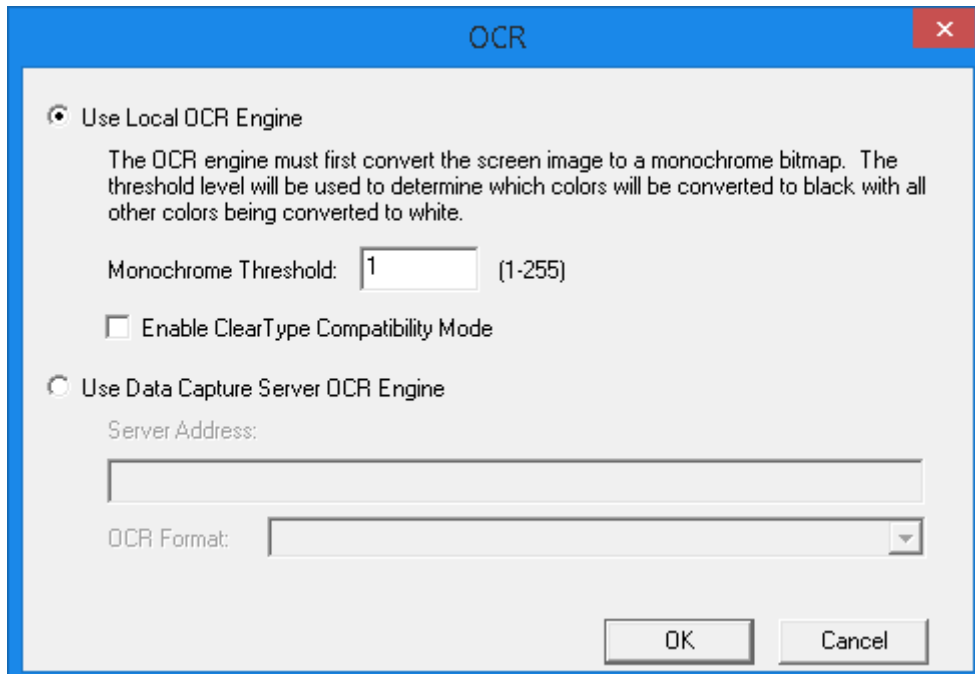
The screenshot shows a dialog box titled "DDE" with a blue header bar and a red close button. The main area has a light gray background and contains the following text: "Some applications support DDE and AppEnabler can request contents through DDE links. Please provide services, topics and items or select from the lists." Below this text are two side-by-side panels. The left panel is titled "Copy Screen Content" and the right panel is titled "Request Cursor Position". Each panel contains three dropdown menus labeled "Service:", "Service Topic:", and "Topic Item:". At the bottom of the dialog are two buttons: "OK" and "Cancel".

The **DDE** setting should be used for text-based applications that do not communicate with the clipboard. DDE is the preferred method to use with text-based applications. DDE should be used and only if this fails should the clipboard method be used. In order to configure the DDE tab, you need to know the **Service**, **Service Topic**, and **Topic Item** for screen contents and cursor positions. These may be listed in the drop-down lists; otherwise, check server references and input manually.

Another use for the DDE setting is if you want to configure multiple hotspots on a text-based application that could potentially have the same value. Without the use of the DDE setting, the first instance of the value scraped would be used. Using the DDE option can help identify where on the screen the value was scraped from.

Click **OK** when you have completed configuration.

## OCR



The OCR configuration dialog box has a blue title bar with the text "OCR" and a red close button. It contains two radio button options. The first option, "Use Local OCR Engine", is selected. Below it is a text box for "Monochrome Threshold" with the value "1" and a range "(1-255)". There is also an unchecked checkbox for "Enable ClearType Compatibility Mode". The second option, "Use Data Capture Server OCR Engine", is unselected. Below it is a text box for "Server Address:" and a dropdown menu for "OCR Format:". At the bottom right are "OK" and "Cancel" buttons.

OCR

☒ Use Local OCR Engine

The OCR engine must first convert the screen image to a monochrome bitmap. The threshold level will be used to determine which colors will be converted to black with all other colors being converted to white.

Monochrome Threshold:  (1-255)

☐ Enable ClearType Compatibility Mode

☐ Use Data Capture Server OCR Engine

Server Address:

OCR Format:

OK Cancel

The **OCR** setting must be used if you are configuring Application Enabler to use OCR with this application.

1. Select which OCR engine should be used.
  - To use the native OCR engine, select **Use Local OCR Engine**.
  - To use the Data Capture Server OCR engine, select **Use Data Capture Server OCR Engine**.

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**Note:** Select **Enable ClearType Compatibility Mode** or use the Data Capture Server OCR engine if the application you are enabling uses ClearType fonts.

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**Note:** Additional licensing and configuration is required in order to use the Data Capture Server for OCR processing. See [Data Capture Server on page 326](#) for information.

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2. If you selected **Use Local OCR Engine**, configure the **Monochrome Threshold** value, if necessary. The Monochrome Threshold value is internally used by the local OCR engine. For most applications, the default value of **1** will be sufficient. Modify this value only when the default value does not work for the screens in your application.
3. If you selected **Use Local OCR Engine**, and the application you are enabling uses ClearType fonts, select **Enable ClearType Compatibility Mode**.
4. If you selected **Use Data Capture Server OCR Engine**, configure the following settings:
  - **Server Address** - Enter the server address for the Data Capture Server. The server address must be the net.tcp address to the Data Capture Server, for example:  
`net.tcp://localhost:9050/Hyland.DataCapture.ServiceManager/service`
  - **OCR Format** - Select the OCR format to be used.

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**Note:** For information on configuring OCR formats, refer to the **Full-Page OCR** module reference guide.

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5. Click **OK** when you have completed configuration.

## Java AccessName

This tab controls the rule used to match the **AccessName** for Java screens, so that Application Enabler can appropriately identify the application. The options are as follows:

Options	Description
<b>Exact match</b>	The AccessName must exactly match the AccessName entered at the time of configuration.
<b>Match at beginning</b>	The AccessName must match the beginning of the AccessName entered at the time of configuration.
<b>Match anywhere</b>	The AccessName must match the AccessName entered at the time of configuration anywhere in the AccessName.

Options	Description
<b>Match at End</b>	The AccessName must match the end of the AccessName entered at the time of configuration.

## Save and Close

Save the configuration by clicking **Save**. After saving the current configuration, Application Enabler Configuration automatically performs a health check of the configuration file. This health check helps identify configurations that may be invalid.

For example, if you configure a retrieval or indexing context but do not configure a Document Type, you will be prompted that your configuration may be invalid.

Any health check warnings that are presented are saved to a text file in the same location as the XML configuration file. This file is named **[name of XML configuration file].xml.warning.txt**.

Be sure that the directory that you save the configuration file in is available to all users that will need to use Application Enabler in conjunction with the enabled application. Click **Save**.

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**Note:** A single Application Enabler configuration file is limited to 30 enabled applications.

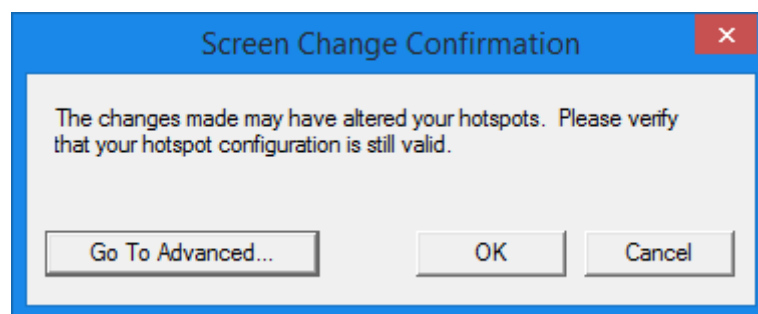
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## Opening Existing Configurations

Refresh Application Enabler by closing and restarting the application. Open the configuration file by selecting **Load Configuration** in Application Enabler. Enable the event capturing process and test your configuration to ensure that it retrieves the desired documents.

## Editing Existing Configurations

When you change an existing configuration file, changes made may affect existing hotspot configuration. When a configuration change may have affected a hotspot configuration, the following dialog box is displayed.



Click **OK** to continue with the configuration.

Click **Go To Advanced** to go to the **Hotspots Configuration** dialog box to confirm the configuration changes are correct.

Click **Cancel**, to cancel your changes.

## Enabling Microsoft Dynamics GP Applications

### Configuration Overview for Microsoft Dynamics GP Applications

The Dynamics GP application configuration process creates links between Dynamics GP line-of-business application data fields and OnBase Keyword Types. After opening Application Enabler Configuration, create links by doing the following.

1. Open the line-of-business application to enable. See [Open the Line-of-Business Application on page 240](#).
2. Create links between line-of-business application fields and Document Types and Keyword Types. See [Create Links Between Line-of-Business Application Screens/Fields and System Keywords on page 240](#).
  - Create a new Dynamics GP screen configuration in Application Enabler Configuration.
  - Identify the Dynamics GP screen to enable.
  - If no **Name** is displayed on the **General** section, click **View Window Info Tree** and find the 'parent' of the control you are going to use. See [View Window Info Tree on page 244](#).
  - Create appropriate screen identification strings.
3. Log on to OnBase. You have access to the only those documents for which you have been granted rights. See [Logging on to OnBase on page 245](#).
  - Select the Document Types to be retrieved when on the line-of-business application screen. See [Select Document Types on page 246](#).
4. Establish a link between the OnBase Keyword Types, Unity Form fields, or WorkView attributes to a location on the line-of-business application screen. See [Associating Keyword Types, Unity Form Fields, or WorkView Attributes on page 247](#).
  - Click **Settings** to access formatting options. Select the appropriate stripping options to eliminate unwanted characters or spaces. Appropriate formatting options are available for date or currency. See [Settings on page 254](#).

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**Note:** The formatting options on the **Strip**, **Parse**, and **Append** tabs can work in conjunction with one another. Formatting options are applied sequentially, such that options on the **Strip** tab are applied first, followed by options on the **Parse** tab, and then by options on the **Append** tab. Options on these tabs are also applied sequentially, from the top of the tab to the bottom of the tab.

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5. Configure properties. See [Properties Dialog Box](#) on page 263.
6. Save your configuration. See [Save and Close](#) on page 273.

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**Note:** Hotspots cannot be configured for Dynamics GP applications.

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## Step by Step Configuration

### Open the Line-of-Business Application

Open the line-of-business application you want to enable.

### Create Links Between Line-of-Business Application Screens/Fields and System Keywords

In order to create links with the line-of-business application you will:

1. Identify each line-of-business application screen to enable. A line-of-business application screen is a single window of information. Line-of-business applications can have many screens. You can enable one or many screens.
2. Identify, or map, each line-of-business application form field and its related keyword in OnBase. Line-of-business application screens can contain configurable form fields, non-configurable text and other components.
3. Select keywords used for retrieval.

### Create a New Dynamics GP Screen Configuration

Ensure that the screen you wish to enable is visible and can be selected with a single mouse click.

To begin enabling an application:

1. In Application Enabler Configuration, click **New GP-Screen** or the **Configure a new Dynamics GP screen** toolbar button.
2. Application Enabler Configuration prepares to capture the first input screen to be enabled.

3. As you move the mouse across the line-of-business application, areas of your screen are highlighted by a selection box, which encloses the area selected for capture. Place your mouse over the line-of-business application you wish to enable. Move your mouse until the selection box encloses the entire line-of-business application screen and left-click to select it. It is possible (but not necessarily desirable) to select individual line-of-business application form fields (i.e., text boxes), in which case the selection box encloses the form field.

The screenshot shows a dialog box titled "Search Customers" with a blue header bar. It contains four sections for search definitions and a section for search options.

**Search Definition 1**

Column Name:  Filter:  Value:   
☐ Field Comparison ☐ Match Case

**Search Definition 2**

Column Name:  Filter:  Value:   
☐ Field Comparison ☐ Match Case

**Search Definition 3**

Column Name:  Filter:  Value:   
☐ Field Comparison ☐ Match Case

**Search Definition 4**

Column Name:  Filter:  Value:   
☐ Field Comparison ☐ Match Case

**Search Options**

**Maximum Records:**  Search Type:

Buttons: Clear All, Columns, Order By, OK, Cancel



4. Application Enabler Configuration extracts the name of the line-of-business application screen and displays the **Property Page** dialog box:

The screenshot shows the 'Property Page' dialog box. The 'General' section contains two text fields: 'Name' and 'Caption', both with the value 'Sample Program - Medical Application'. A 'View Window Info Tree' button is located to the right of the 'Caption' field. The 'Screen Identification Strings' section features a table with two columns, 'Field Na...' and 'Value', and three buttons: 'New', 'Edit', and 'Remove'. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

In some cases, the line-of-business application name may not appear as you wish. Rename the screen by replacing the default name. You can use this identification method if the name/path for the application is static.

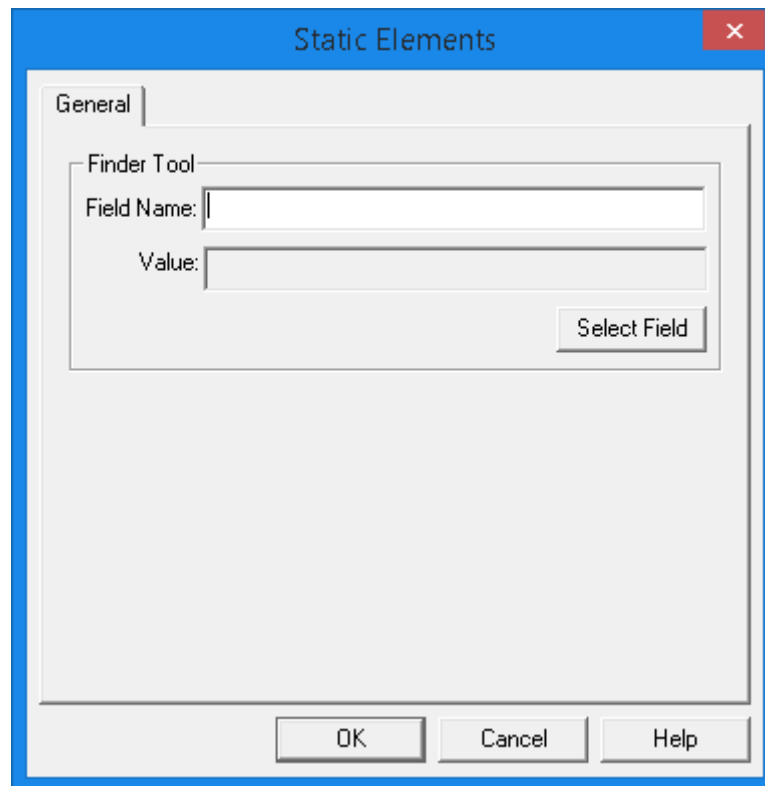
---

**Caution:** If you change the text in the **Caption** field and you are using the caption to identify the screen, the screen may not be identified correctly for your configuration. If this occurs, you must reconfigure the enabled application to reflect the changed caption text.

---

If the name/path is dynamic, you can configure **Screen Identification Strings** for the screen. These strings should be elements on the screen that do not change. To create Screen Identification Strings:

1. Click **New**. The **Static Elements** dialog box is displayed:



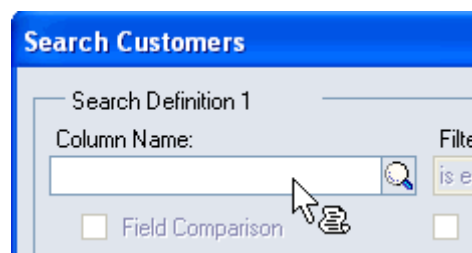
2. Click **Select Field**.

---

**Note:** You can also manually enter values, but the **Select Field** button can provide easy, faster, and more accurate results.

---

3. A cursor with a scroll icon is displayed.

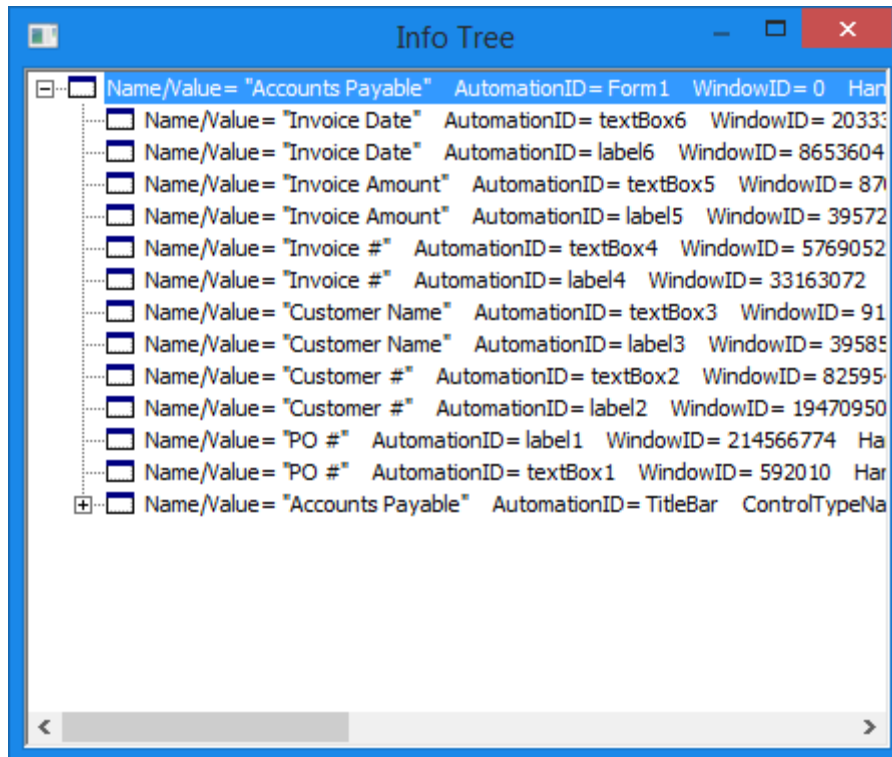


Using this cursor, select a field that identifies the screen.

4. Click **OK**.
5. Repeat the above steps for each string you need to configure.
6. When done configuring screen identification strings, click **Next**.

## View Window Info Tree

Clicking **View Window Info Tree** in the **Settings** dialog box opens the **Info Tree** dialog box:



This dialog box contains the following information for the application and the application's fields:

- Caption/Value
- Window ID
- Window Handle
- Class Name

This information can be helpful during configuration. This dialog box allows you to identify the parent window, a sub window, or field. To identify any parent, window, or field, right-click on any item and select **Highlight**.

In addition, you can right-click on the window and select **Search** to search. For Smart-Screen, Windows-based, text-based, HTML-based, and Dynamics GP-based applications, the Caption/Value item will be searched. For Java-based applications, Value, AccessName, and AccessDescription will be searched.

You can also right-click on the window and select **Save As** to save the data in the **Info Tree** dialog box to a text file.

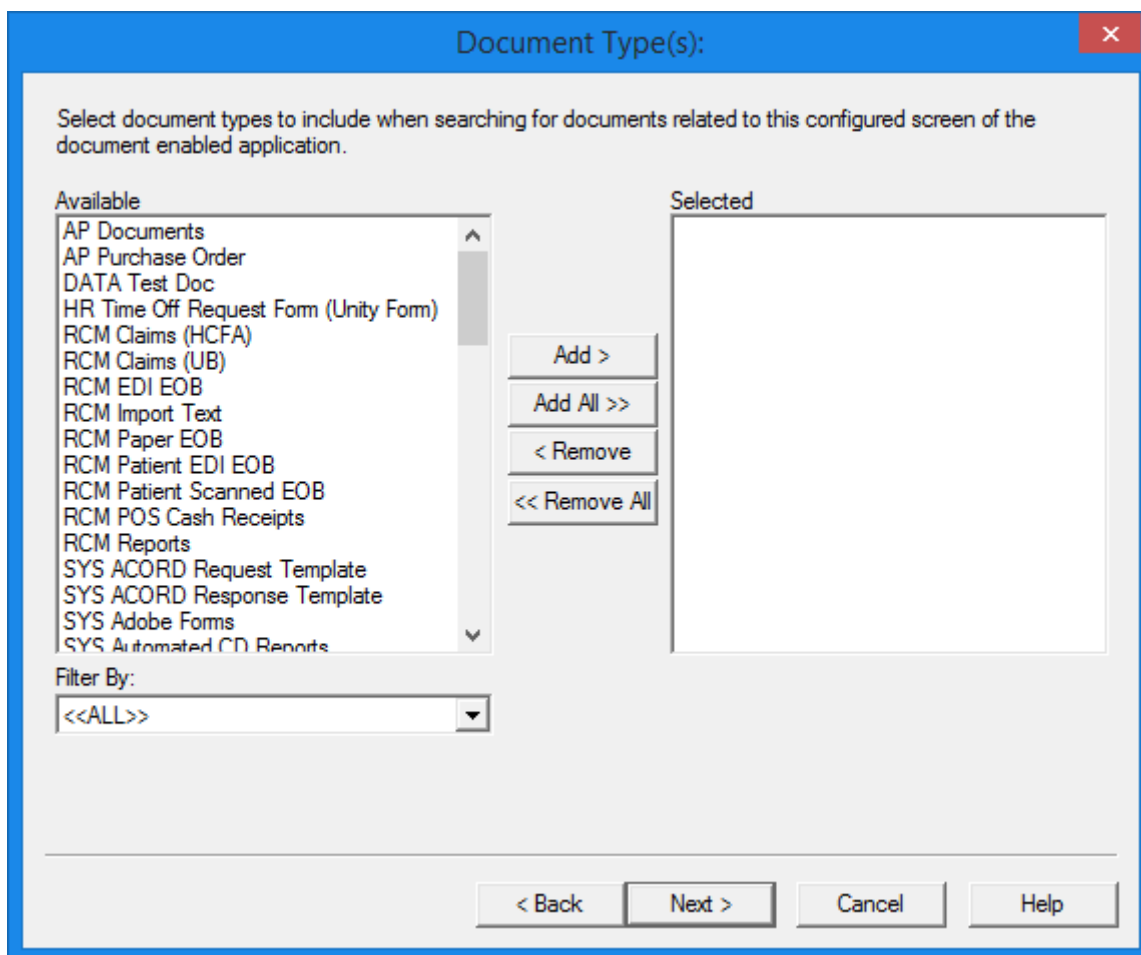
## Logging on to OnBase

If you are not currently connected to OnBase, a window opens and prompts you to log on.

1. Select the appropriate data source from the drop-down list. This drop-down list is only displayed when multiple data sources are available.
2. Type your OnBase user name.
3. Type your OnBase password.
4. Click **Login** to log on, or click **Cancel** to close the dialog without logging on.

## Select Document Types

The **Document Type(s)** dialog box is displayed:



1. Select the Document Types to search when retrieving OnBase documents through the line-of-business application. If you want to display all documents related to a screen, select all the Document Types that a user could possibly need from this screen. If you want to display only documents most relevant to a screen, select only the Document Types that most closely relate to the screen. Cross-referencing can be used to find other less closely related documents. Hold down the **Ctrl** key while selecting Document Types to select multiple Document Types that are not consecutively listed. Hold down the **Shift** key while selecting Document Types to select multiple Document Types that are consecutively listed.

---

**Note:** A Document Type is not required if you are configuring Healthcare Module Keyword Types or WorkView attributes.

---

2. Select one or multiple (using the Ctrl or Shift keys) Document Types from the **Available** list and click **Add** to add them to the **Selected** list. To add all Document Types, click **Add All**.  
To remove one or multiple (using the Ctrl or Shift keys) Document Types from the **Selected** list, select the Document Type(s) and click **Remove**. To remove all Document Types, click **Remove All**.
3. To filter available Document Types by Document Type Group, select a Document Type Group from the **Filter By** drop-down list.
4. Click **Next** to continue.

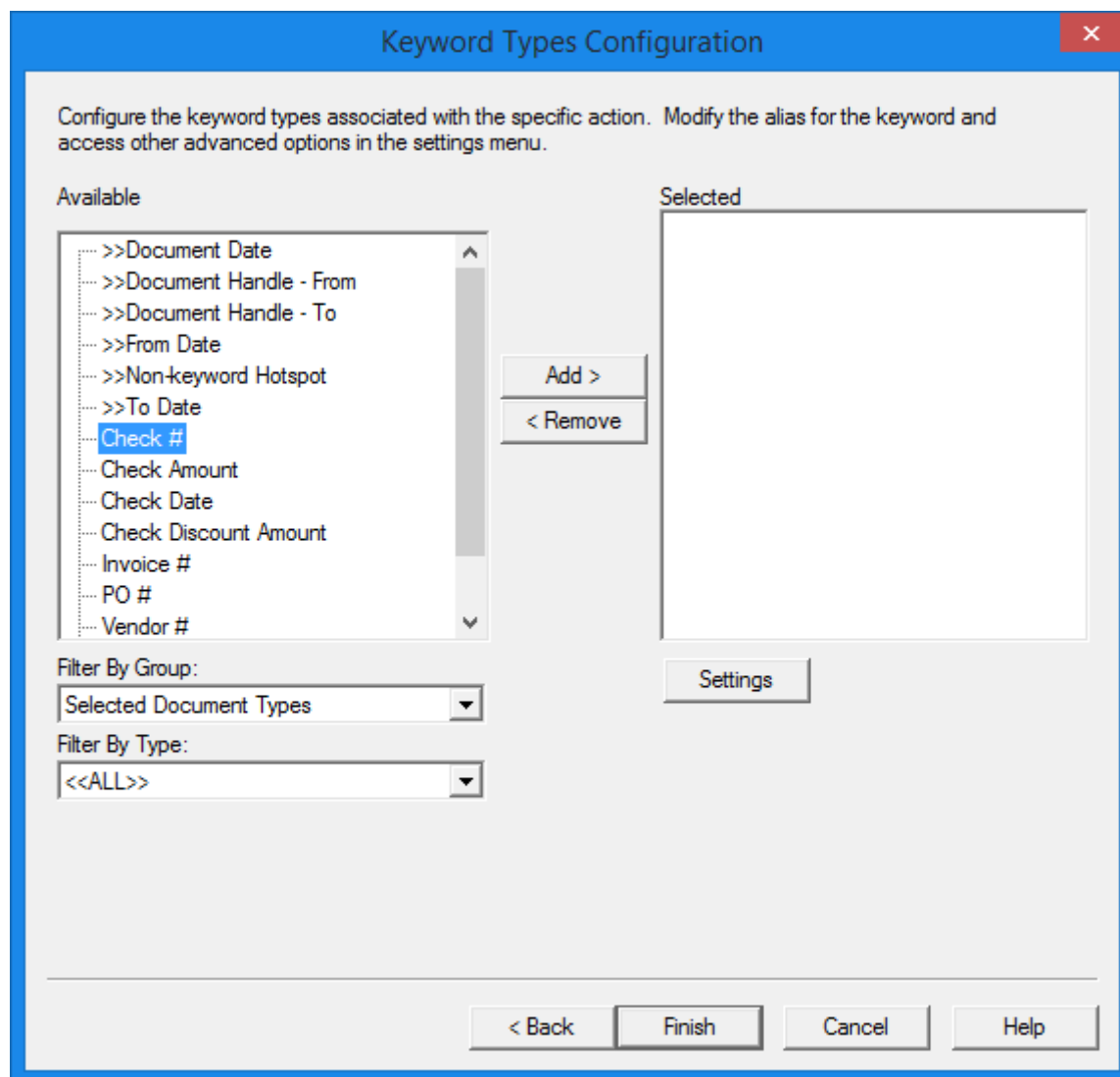
## Associating Keyword Types, Unity Form Fields, or WorkView Attributes

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**Caution:** Specific Currency Keyword Types are not currently supported for use with Application Enabler.

---

After selecting Document Types, the **Keyword Types Configuration** dialog box is displayed.



This screen allows you to associate Keyword Types, Unity Form fields, or WorkView attributes with the configured screen.

You can filter the **Available** list using the **Filter By Group** and **Filter By Type** drop-down lists. These two drop-down lists work together to narrow down the items that are displayed for easy selection and configuration. The **Filter By Group** drop-down list includes the following:

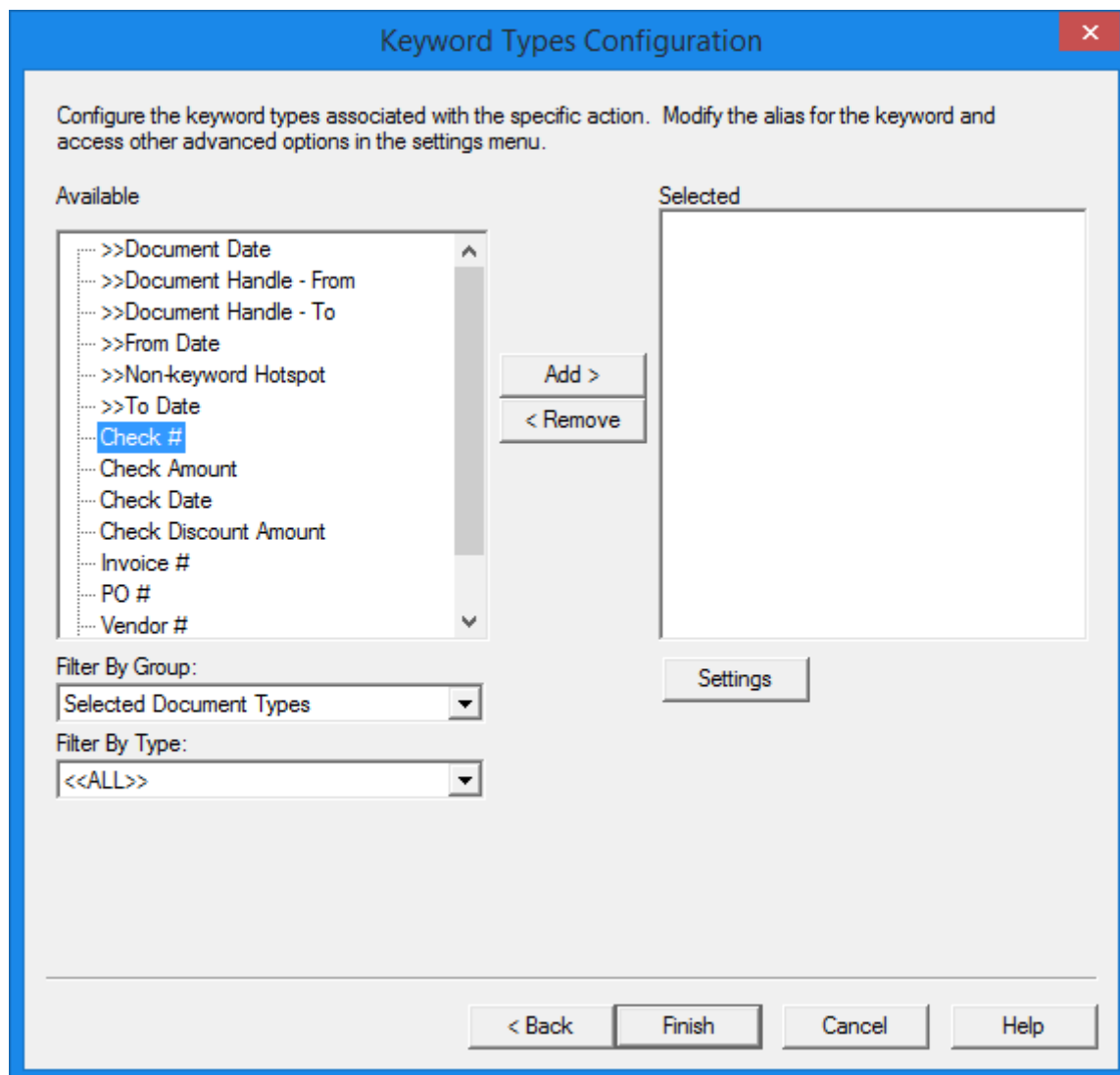
Filter By Group	Description
<b>Combined View Types</b>	When selected, the <b>Available</b> list displays any Combined View Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen. The <b>Filter By Type</b> drop-down list contains the available Combined View Types.

Filter By Group	Description
<b>Government Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase government module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the <b>Plan Review</b> selection, which is for the Electronic Plan Review module.</p>
<b>Healthcare Modules</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the OnBase healthcare module selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains the following OnBase healthcare modules:</p> <ul style="list-style-type: none"> <li>• DeficiencyPop</li> <li>• RAC Audit</li> <li>• Patient Window</li> </ul> <hr/> <p><b>Note:</b> The ChartPop, DeficiencyPop, and LongitudinalPop options are maintained for legacy purposes only. For new medical deployments, please use the OnBase Patient Window.</p> <hr/>
<b>Selected Document Types</b>	<p>When selected, the <b>Available</b> list displays any Keyword Types associated with the Document Type(s) that were selected on the <b>Document Type(s):</b> screen.</p> <p>The <b>Filter By Type</b> drop-down list contains the Document Types that were selected on the <b>Document Type(s):</b> screen.</p>
<b>Unity Form Templates</b>	<p>When selected, the <b>Available</b> list displays any Unity Form fields associated with the Unity Form template selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of Unity Form templates.</p>
<b>Workview App</b>	<p>When selected, the <b>Available</b> list displays any WorkView attributes associated with the WorkView class that is selected from the <b>Filter By Type</b> drop-down list.</p> <p>The <b>Filter By Type</b> drop-down list contains a list of WorkView classes.</p> <hr/> <p><b>Note:</b> The following WorkView attribute Data Types are not supported for use with Application Enabler, and are not displayed during configuration: Text, Formatted Text, Document, Date/Time. External classes are not supported for use with Application Enabler. Multiple level relationships (for example, AssignedEmployee.Manager.FullName) are also not supported.</p> <hr/>



1. If you are configuring a Keyword Type, select the Keyword Type in the **Available** list and click **Add**.

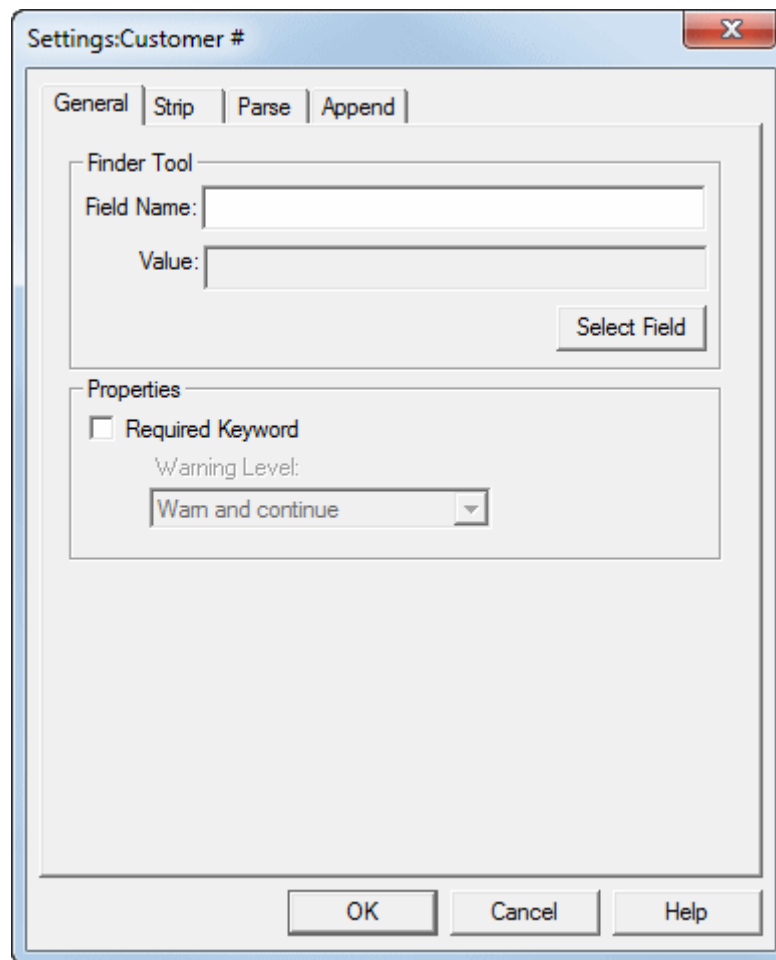
Keyword Types that are mapped to system properties are available for configuration. See >>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date on page 252 for more information.



If you are configuring a Unity Form, select Unity Form fields in the **Available** list and click **Add**.

If you are configuring a WorkView attribute, select the attribute in the **Available** list and click **Add**. Nested attributes are displayed with a + symbol.

2. The **Settings** dialog box is displayed. It contains the **General**, **Strip**, **Parse**, and **Append** tabs.



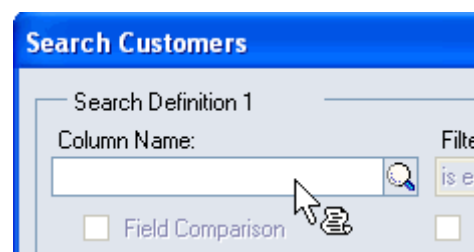
3. Click **Select Field**.

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**Note:** You can also manually enter values, but the **Select Field** button can provide easy, faster, and more accurate results.

---

4. A cursor with a scroll icon is displayed.



Using this cursor select a field that identifies the screen.

5. Select the **Required keyword** check box option if you want to make the keyword required for Application Enabler actions. See [Setting a Keyword as Required on page 254](#) for more information.
6. If you want to configure stripping and parsing settings, configure them on the **Strip** and **Parse** tabs discussed on [Character Stripping on page 255](#) and [Parsing on page 257](#). If you want to append a specific prefix and suffix to scraped Keyword Values for the selected Keyword Type, configure them on the **Append** tab discussed below. When you are done configuring the keyword settings, click **OK**. The **Keyword Types Configuration** dialog box will display.
7. Repeat steps 1-6 for each element you need to configure.

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**Note:** Multiple IDs can be associated with a single Keyword Type. When a new ID is associated with a keyword that already is associated with an ID, the keyword name is followed by an incremental number in parenthesis to distinguish between the different associated IDs. Multiple occurrences of IDs can be associated with keywords. Example: The second association of the Vendor Name Keyword Type with an ID results in a Keyword Type name of Vendor Name (01). The third association results in a Keyword Type name of Vendor Name (02).

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**Note:** WorkView attributes, Unity Form fields, and module-specific Keyword Types can only be mapped to a field once.

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8. Click **Finish**.

**>>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date**

The **>>Document Date, >>Document Handle - From, >>Document Handle - To, >>From Date, >>Non-keyword Hotspot, and >>To Date** Keyword Type selections have distinct purposes.

Keyword Type	Description
<b>&gt;&gt;Document Date</b>	<p>Allows you to map to the Document Date of a document during indexing.</p> <hr/> <p><b>Note:</b> The <b>&gt;&gt;Document Date</b> Keyword Type is not respected by all Application Enabler contexts. For more information, see <a href="#">Using Contexts on page 288</a>.</p> <hr/>

Keyword Type	Description
>>Document Handle - From	<p>Allows you to map to the <b>From</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b>, and <b>Application Enabler - Retrieve in Workflow</b> contexts, or generate document packets with the <b>Application Enabler - Generate Document Packets</b> context.</p> <p>To retrieve using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Retrieve Documents</b> and <b>Application Enabler - Retrieve in Workflow</b> will only retrieve the single Document Handle that matches the scraped value.</p> <p>To generate a document packet using a single Document Handle, configure the <b>Document Handle - From</b> Keyword Type. <b>Application Enabler - Generate Document Packets</b> will only generate the packet for that single Document Handle that matches the scraped value.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - From Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/> <p><b>Note:</b> When using the &gt;&gt;Document Handle - From Keyword Type with the <b>Application Enabler - Retrieve in Workflow</b> context, all other keywords that are passed in will be ignored.</p> <hr/> <p><b>Note:</b> In order for document retrieval to function as expected when using the <b>Document Handle</b> system keyword, the <b>Retrieve by Document Handle / File Name</b> product right must be assigned to the user's user group in the OnBase Configuration module.</p> <hr/>
>>Document Handle - To	<p>Allows you to map to the <b>To</b> Document Handle range for retrieving documents with the <b>Application Enabler - Retrieve Documents</b> context.</p> <hr/> <p><b>Note:</b> The &gt;&gt;Document Handle - To Keyword Type cannot be used with Application Enabler Live or memorization.</p> <hr/>
>>From Date	<p>Allows you to map to the <b>From</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

Keyword Type	Description
>>Non-keyword Hotspot	Allows you to map a hotspot to any screen element without mapping the element to a Keyword Type. This will allow a screen scrape to be initiated from any element on the screen. For example, using this selection, the hotspot could be mapped to a button on the screen that is not associated with a Keyword Value.
>>To Date	<p>Allows you to map to the <b>To</b> date range for retrieving documents.</p> <hr/> <p><b>Note:</b> When a &gt;&gt;From Date or &gt;&gt;To Date is scraped and a default date range is configured in the OnBase Client, scraping values will clear the &gt;&gt;From Date and &gt;&gt;To Date fields in the OnBase Client and only show the scraped value.</p> <hr/>

## Settings

The **Settings** dialog box is opened by clicking the **Settings** button on the **Keyword Types Configuration** screen. Available settings are described in the following sections:

- [Setting a Keyword as Required on page 254](#)
- [Character Stripping on page 255](#)
- [Parsing on page 257](#)
- [Appending Prefixes and/or Suffixes to Scraped Keyword Values on page 259](#)
- [Currency Keyword Formatting on page 260](#)
- [Date Keyword Formatting on page 261](#)

### Setting a Keyword as Required

The **General** tab allows you to set a Keyword Type as a required keyword. To make a keyword required, select **Required keyword**. You can select either **Warn and continue** or **Warn and cancel** from the **Warning Level** drop-down list to determine if you want users to be able to continue a query that does not specify a value for a required keyword. You can also click **View Window Info Tree** to access the **Info Tree** dialog box. This dialog box can be used to identify fields to map to Keyword Types.

## Character Stripping

If you wish to retrieve documents based on a subset of characters within a value, you can configure Application Enabler to "strip" characters to exclude from the search using the **Strip** tab. For example, if a line-of-business application field contains a full phone number and you wish to retrieve OnBase documents based on area code, configure character stripping to remove all characters but the area code from the line-of-business application field.

Settings:AP PO#

General Strip Parse Append

Each strip option allows you to remove selected characters for the scraped value.  
Each option is applied in a top to bottom sequence.

☐ Strip spaces

☐ Strip any occurrences of string

String:

☐ Strip from beginning

Number of characters:

☐ Strip from end

Number of characters:

OK Cancel Help

The sequence of operation is from the top down. Application Enabler first strips spaces (if checked) then strips characters (if checked) and so on.

The following settings are available on the **Strip** tab:

Setting	Description
<b>Strip spaces</b>	Select <b>Strip spaces</b> to remove all spaces from the line-of-business application value, regardless of the location of the spaces. For example, if <b>Strip spaces</b> is selected, double-clicking on a properly configured line-of-business application field containing <b>2_2___16_44___</b> (where _ represents a space) will return OnBase documents with the Keyword Value <b>221644</b> .
<b>Strip any occurrences of string</b>	Select <b>Strip any occurrences of string</b> to strip all occurrences of a specific character from the line-of-business application value, regardless of the location of the character within the value. Enter the character you wish to strip in the <b>String</b> field. This option could be used to strip all dashes from a Social Security Number or an account number.  <b>Note:</b> Values are case sensitive.
<b>Strip from beginning</b>	Select <b>Strip from beginning</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the beginning of a value. For example, <b>Strip 5 Characters from Beginning</b> could be used to strip 3-digit area code enclosed in parentheses (###) from a telephone number.
<b>Strip from end</b>	Select <b>Strip from end</b> (where <b>Number of characters</b> represents the numeric value you specify) to strip a specific number of characters from the end of a value.

When your selection is complete, click **OK** to return to the **Keyword Types Configuration** screen. Define character-stripping options for each keyword that requires character stripping. Click **Next** to continue configuring Application Enabler.

## Parsing

The **Parse** tab allows you to extract characters and words from scraped values within the enabled application:

Settings:AP PO#

General | Strip | **Parse** | Append

Each parse option allows you to extract characters from the scraped value. Each option is applied in a top to bottom sequence.

☐ Extract from beginning

Starting position: 1

Number of characters: 1

☐ Extract from end

Starting position: 1

Number of characters: 1

☐ Word extraction

Starting position: 1

Number of words: 1

Separators:

☐ Increment word count after each separator

☐ Count words from the end

When parsing, Application Enabler attempts to find characters at the configured **Starting position**. Spaces are excluded from the configured **Number of characters**. For example, the **Starting position** is 1 and the **Number of characters** is 10. Application Enabler starts at 1, but encounters 8 spaces before a numeric character. In this example, Application Enabler excludes the 8 spaces from the **Number of characters** count, and the numeric character becomes the first of the 10 characters that Application Enabler will extract for the Keyword Value.

To extract characters starting at the beginning of a line:

1. Select the **Extract from beginning** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the Keyword Value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.



To extract characters starting at the end of a line:

1. Select the **Extract from end** check box.
2. Enter the column number where the characters that are to be extracted start in the **Starting position** field.
3. Enter the number of characters you want to extract for the keyword value in the **Number of characters** field.
4. Click **OK** to return to the **Keyword Type Configuration** screen.

To extract words:

1. Select the **Word extraction** check box.
2. Enter the word number where the words that are to be extracted start in the **Starting position** field.
3. Enter the number of words you want to extract from the keyword value in the **Number of words** field.
4. Enter the character that separates the words in the **Separators** field. If you want to use a tab as a separator, click the **Insert Tab** button. A tab will be placed in the field.

---

**Note:** The default separator character is a space. Multiple characters can be entered into the field. Only one character can be used at one time and the character used must come from the list of characters entered into the **Separators** field. You must delete the space character from the field if you do not want to use spaces as separators.

---

5. If you want to account for blank values that may exist between separators, select the **Increment word count after each separator** option. This option will ensure that the number of values corresponds with the number of separators.
6. If you want to begin counting words from the end of the line, select the **Count words from the end** option.

---

**Note:** If **Count words from the end** is selected, Application Enabler will count back the specified number of words, and then extract the set number of words forward from that point.

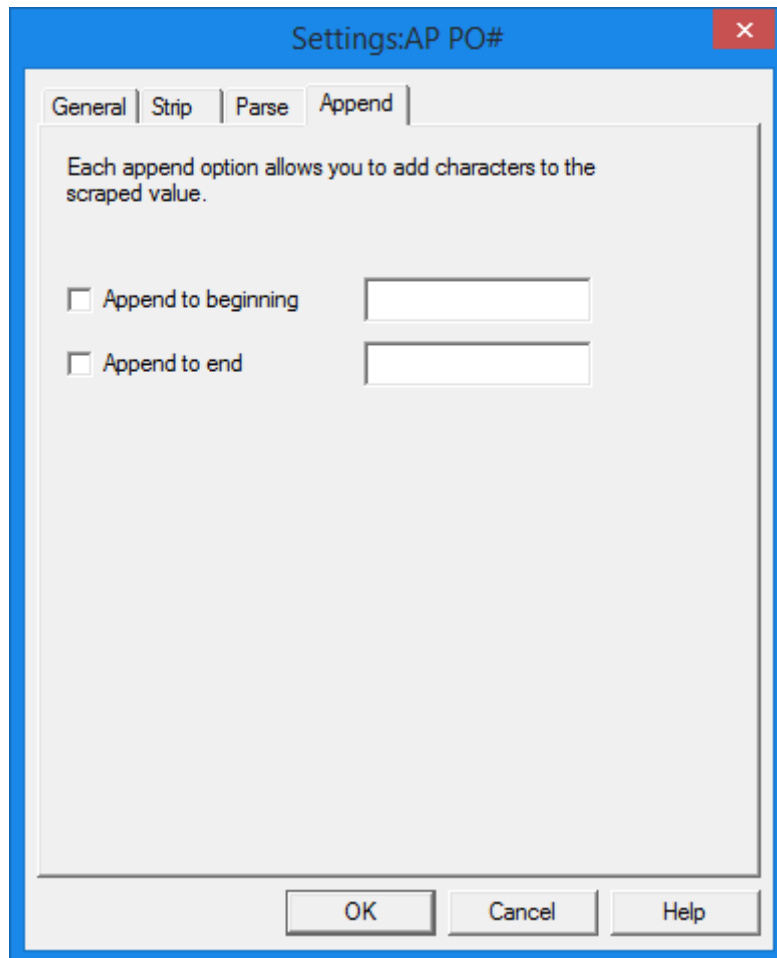
---

7. Click **OK** to return to the **Keyword Type Configuration** screen.

Advanced parsing is discussed in [Advanced Parsing on page 1](#).

## Appending Prefixes and/or Suffixes to Scraped Keyword Values

The **Append** tab allows you to configure a specific prefix and/or suffix to be affixed to scraped Keyword Values for the selected Keyword Type.



To append a prefix or suffix:

1. Select the **Append to beginning** or **Append to end** check box(es).
2. Enter the value(s) in the field to the right of the selected check box(es).

---

**Note:** Values are case sensitive.

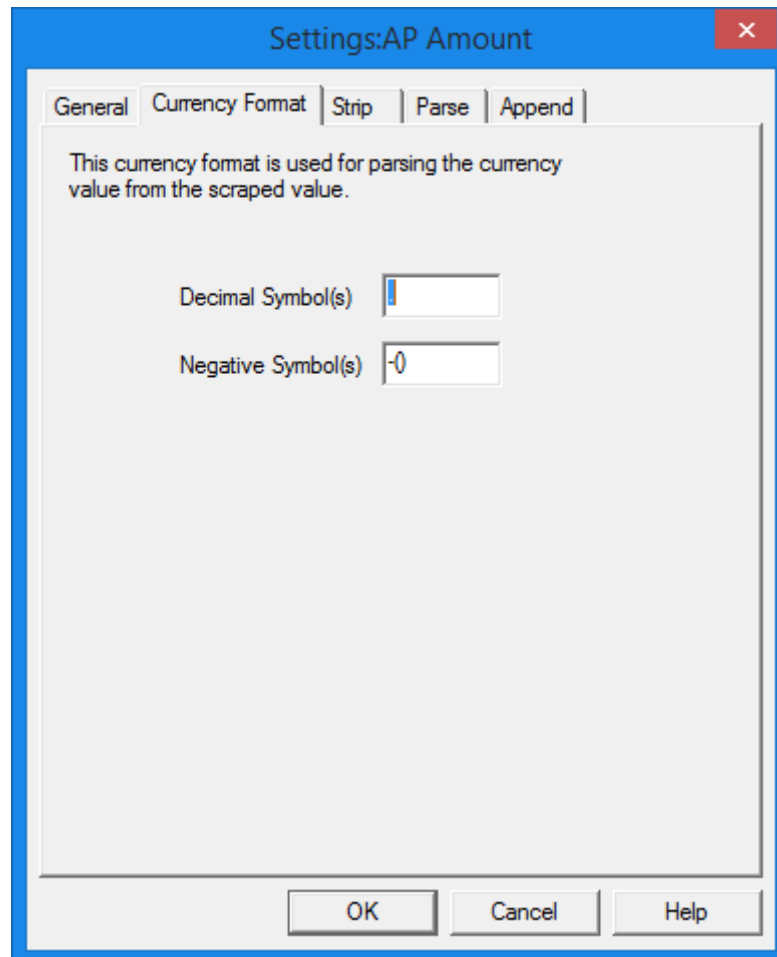
---

3. Click **OK** to return to the **Keyword Type Configuration** screen.

# Currency and Date Keyword Formatting

## Currency Keyword Formatting

For currency Keyword Types, the **Currency Format** tab is available:



In this tab, you can specify the symbol(s) to be used to separate the decimal places from the other places in values (**Decimal Symbol(s)**). You can also specify the symbol(s) to use for negative currency values (**Negative Symbol(s)**).

## Date Keyword Formatting

For date Keyword Types, the **Date Format** tab is available:

Settings:AP PO Date

General | Table | **Date Format** | Strip | Parse | Append

This date format is used for parsing all date fields out of the scraped value.

The format follows the rules for the Windows® regional date settings

Date Format:

Date Sample:

☐ Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)

OK Cancel Help

From the **Date Format** drop-down list, select the format of the date in the line-of-business application.

The following date formats are available:

Format	Example
<b>M/d/yyyy</b>	6/4/2010
<b>MM/d/yy</b>	06/4/10
<b>MM/dd/yy</b>	06/04/10
<b>MM/dd/yyyy</b>	06/04/2010
<b>yy/MM/dd</b>	10/06/04

Format	Example
yyyy-MM-dd	2010-06-04
dd-MMM-yy	04-Jun-10
MMddyy	060410
ddMMyy	040610

When a date value is scraped from the line-of-business application, the value will be converted to reflect the regional settings specified for the workstation.

If you will be scraping Umm al-Qura date values, select the **yy/mm/dd** date format and the **Interpret this date value as a date in the Regional Setting's Calendar (e.g., Um Al Qura calendar for Saudi Arabia)** check box.

---

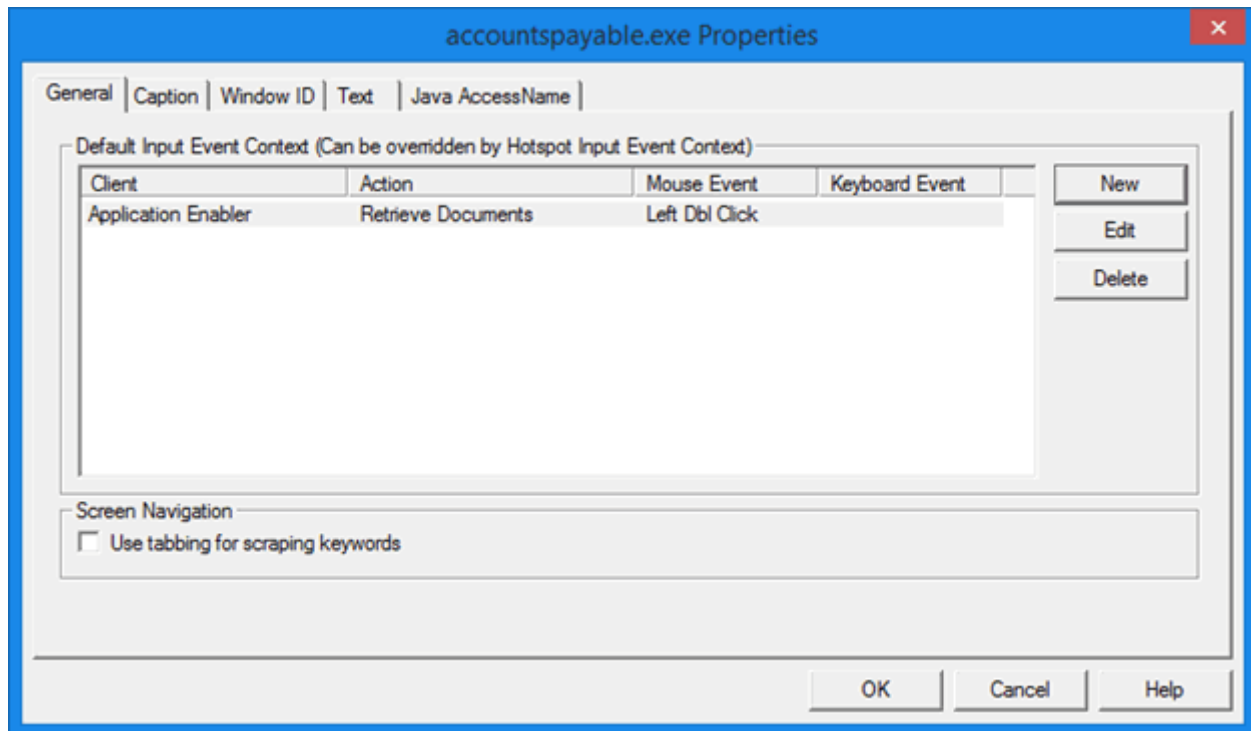
**Note:** You can only use Application Enabler contexts when scraping Umm al-Qura date values.

---

## Properties Dialog Box

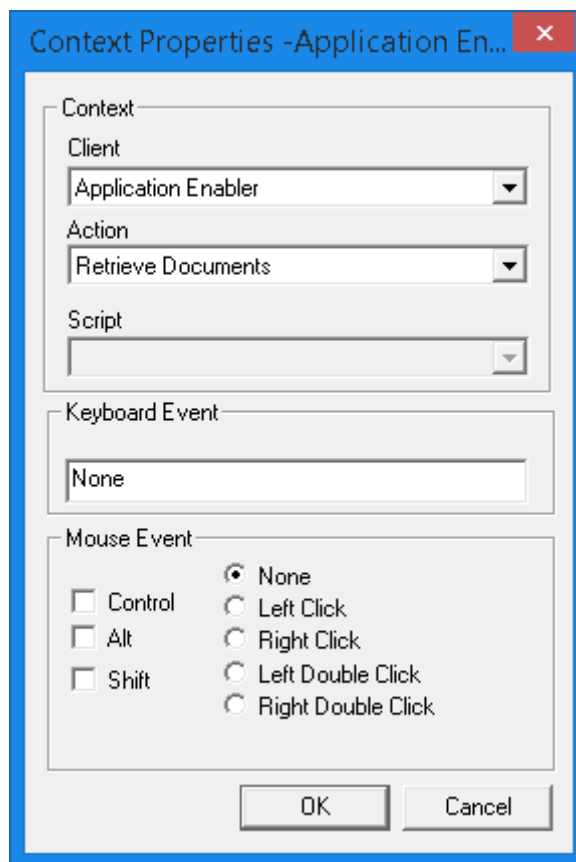
### Mouse and Keyboard Events and Contexts

The **General** tab is used to define the mouse or keyboard events used to trigger document retrieval.



**Note:** When **Desktop - Run Script** is configured as a context, the **Action** column will display the name of the VBScript.

1. To add a new mouse or keyboard event, click **New**.
2. The **Context Properties** dialog box is displayed:



3. Select the OnBase client that will be used to execute the context from the **Client** drop-down list, and the action to be executed from the **Action** drop-down list. For more information on available clients and actions, see [Using Contexts on page 288](#).
4. Depending on the action and context you have configured, you can select either a VBScript or a Unity Script to associate with the keyboard or mouse event from the **Script** drop-down list. The VBScripts and Unity Scripts that are available are those that have been configured for the database that is currently connected.
5. To define a keyboard event used to trigger a search, place your cursor in the **Keyboard Event** field and type the desired keystroke or keystroke combination. For example, press **Ctrl** and **F5** simultaneously to define **Ctrl+F5** as a keystroke combination.
6. To define a mouse event used to trigger a search, select the mouse event from the **Mouse Event** options (**Left Click**, **Right Click**, etc.). You can create a combination keystroke and click event by selecting the **Control**, **Alt**, or **Shift** options in addition to a click event.

When defining mouse events:

- It is recommended to use a keyboard key in addition to the **Left Click** and **Right Click** options. It is also recommended to not use similar mouse and keyboard events in the same application. For example, Shift+Left Click and Shift+Left Double Click.
- The **Left Double Click** and **Right Double Click** options are not supported when enabling a Java-based application.

- The **Left Double Click** and **Right Double Click** options are registered as two single mouse clicks when enabling certain Smart-Screen applications (i.e., WPF and Silverlight applications). To enable these applications, use the **Left Click** or **Right Click** options.
7. Click **OK**.
  8. If you want to use the **Tab** keyboard key to scrape values from the enabled screen, select the **Use tabbing for scraping keywords** check box.
  9. Click **OK**.

---

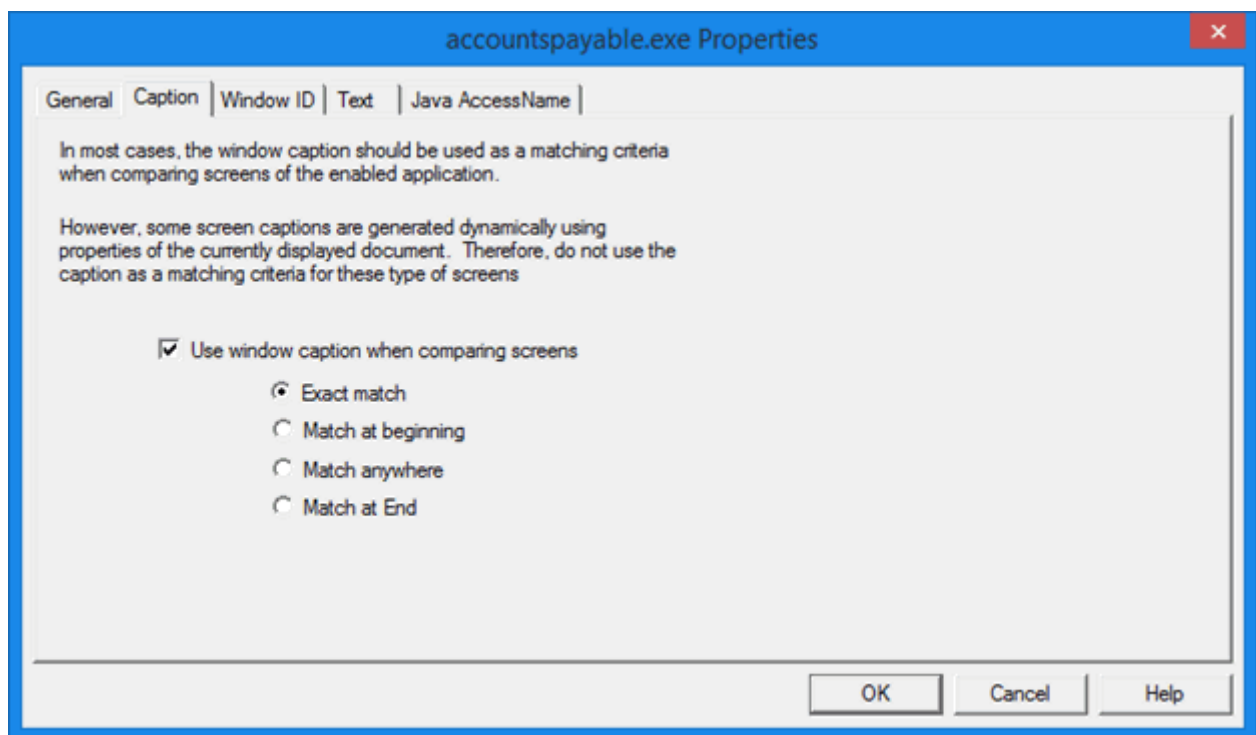
**Note:** Mouse/keyboard events can be changed after configuration by opening an existing configuration, selecting an application, clicking **Configure**, selecting a context, and clicking **Edit**.

---

## Caption

You can use the combination of Window ID and Caption to identify a screen. If both are selected, a screen must meet all of the criteria in order to be identified by Application Enabler.

You can identify a screen by its caption using the **Caption** tab:





The **Use window caption when comparing screens** option is selected by default. This is generally used when no Window ID exists. To identify the screen only by its caption:

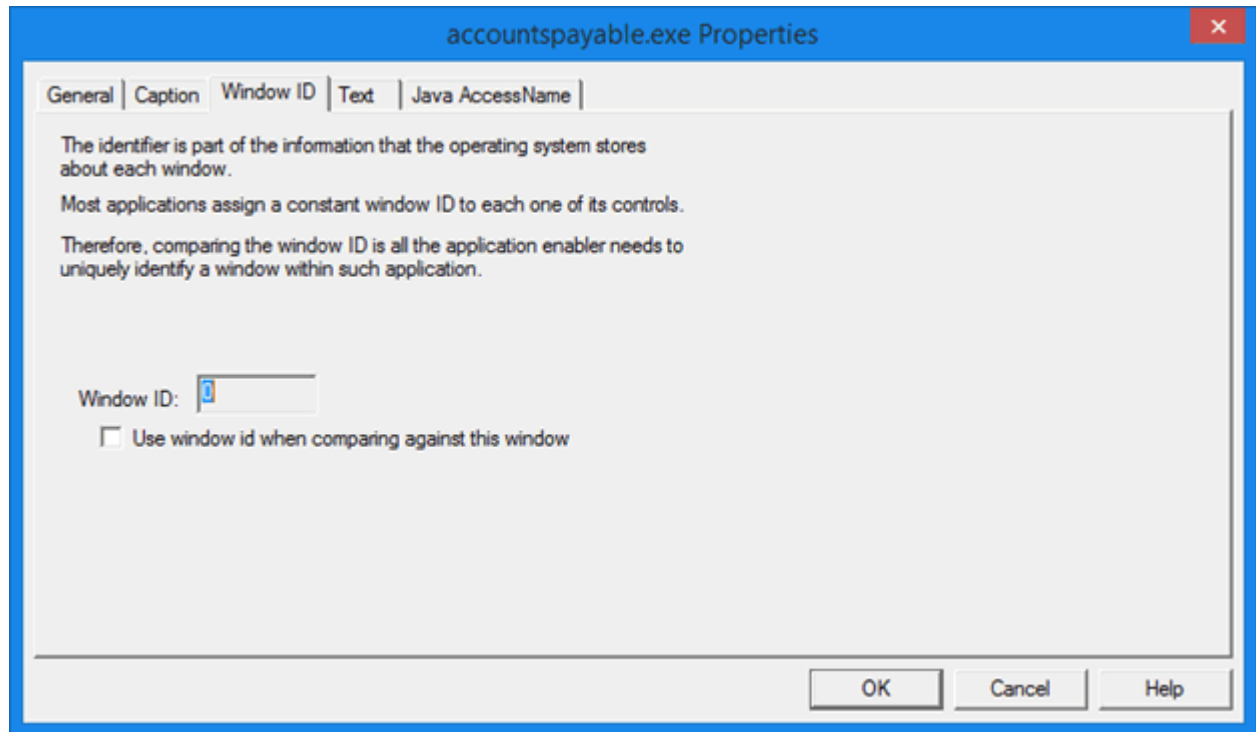
1. Clear **Use window id when comparing against this window** on the **Window ID** tab.
2. On the **Caption** tab, select the **Use window caption when comparing screens** check box and select one of the following options:

Options	Description
<b>Exact match</b>	The caption of a screen must exactly match the caption entered at the time of configuration.
<b>Match at beginning</b>	The caption of a screen must match the beginning of the caption entered at the time of configuration.
<b>Match anywhere</b>	The caption of a screen must match the caption entered at the time of configuration anywhere in the caption.
<b>Match at End</b>	The caption of a screen must match the end of the caption entered at the time of configuration.

3. Click **OK**.

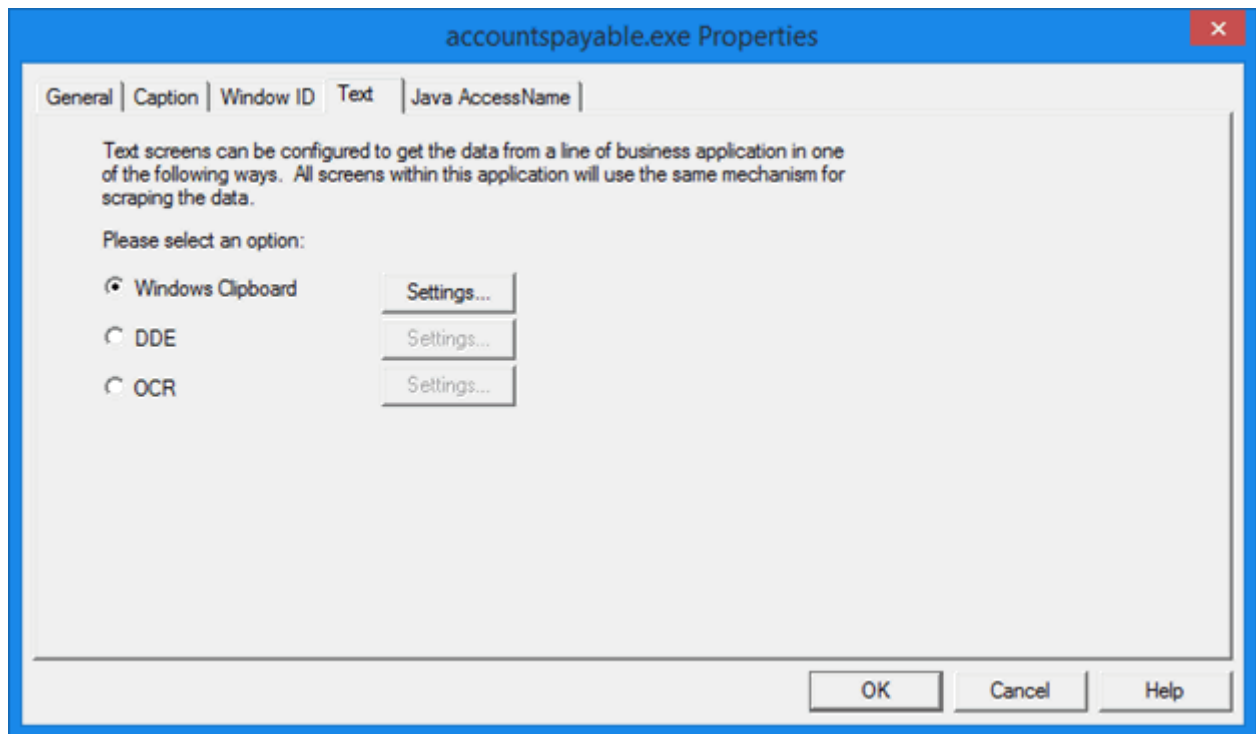
## Window ID

Application Enabler Configuration uses the Window ID as the identification of a screen. The **Use window id when comparing against this window** option must be selected on the **Window ID** tab:



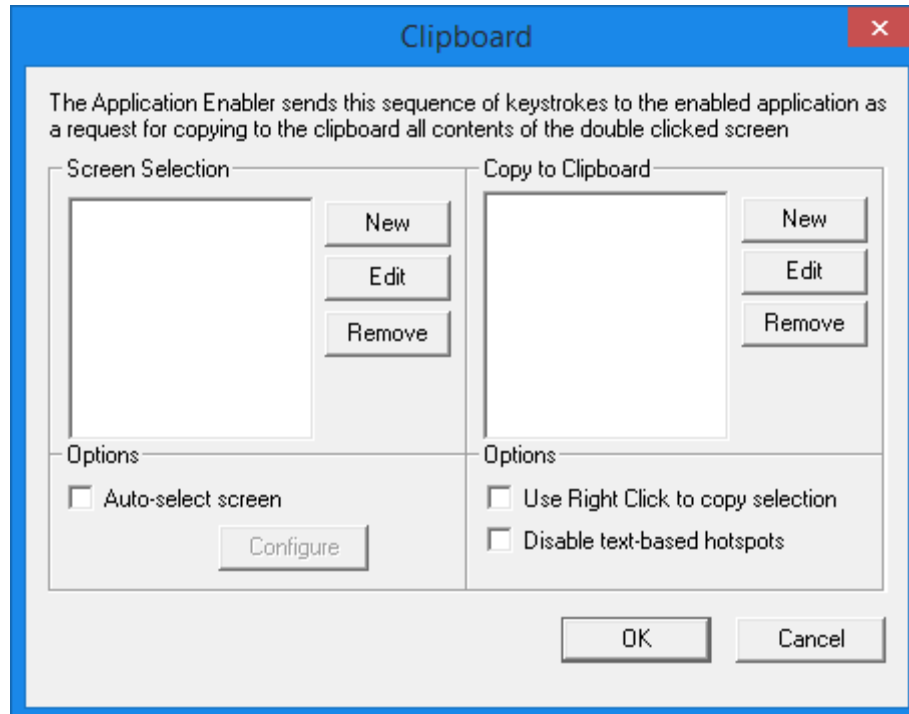
## Text

The **Text** tab is used to configure text screens.



Application Enabler supports three methods for scraping text screens. Select one of the buttons described in the following sections and click the corresponding **Settings** button to configure additional settings.

## Windows Clipboard

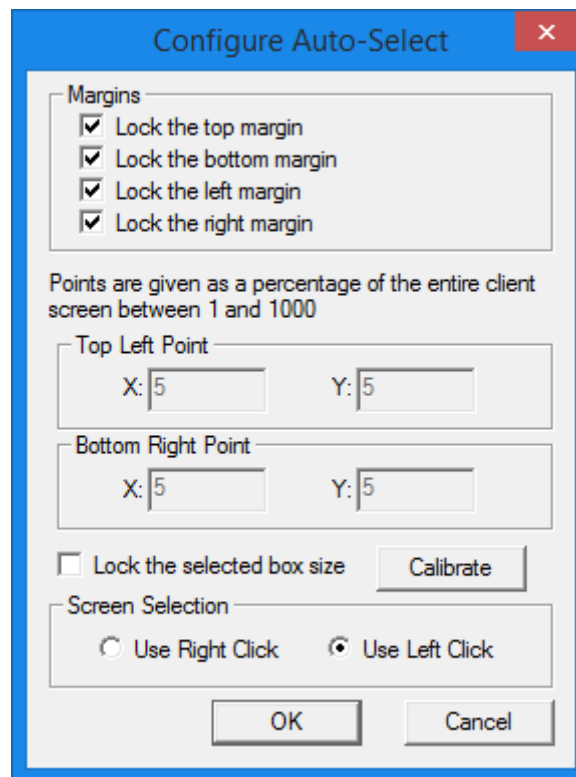


Application Enabler identifies text-based screens and screen data by the line and column location of characters on the text screen. In order to accurately map characters, Application Enabler copies each configured text screen to the Windows clipboard. The **Windows Clipboard** setting allows you to define which keystrokes are used to select a screen and copy it to the clipboard. In most cases, text-based applications will enable when the standard **CTRL + A** (select all) and **CTRL + C** (copy all) are used. Some applications may require alternate keystroke combinations.

1. Click **New**.
2. Enter the keystroke combination in the text field.
3. Click **OK**.

Some applications require automatic selection of the screen to copy text to the clipboard. In this case, select **Auto-select screen**. When this option is selected, the **Configure** button is enabled. To configure the **Auto-select screen** option:

1. Click **Configure**. The **Configure Auto-Select** dialog box is displayed.



2. Select **Lock the top margin** to keep the top margin the same size (in pixels) no matter how the client window is resized.
3. Select **Lock the bottom margin** to keep the bottom margin the same size (in pixels) no matter how the client window is resized.
4. Select **Lock the left margin** to keep the left margin the same size (in pixels) no matter how the client window is resized.
5. Select **Lock the right margin** to keep the right margin the same size (in pixels) no matter how the client window is resized.
6. Select **Lock the selected box size** to keep the box that was selected in the client screen stay the same size no matter how the client window is resized. This option can be used along with the **Lock the top margin** and **Lock the left margin** options to keep the selected area in the same place no matter how the client area is resized.
7. If you want to specify the area of an application that should be auto-selected, click **Calibrate**. This option should only be used for applications that have auto-selection enabled.

8. If you want to use the right mouse button to select the screen, select **Use Right Click**. If you want to use the left mouse button to select the screen, select **Use Left Click**.
9. On the line of business application, click and drag the mouse pointer across the client area that you want to be auto-selected. Coordinates will be populated in the point fields.

As check boxes are checked and unchecked the edit boxes for the initial and ending points become enabled. These values can be edited manually. These values are based on a percentage of the screen out of 1000.

---

**Note:** If the box is not enabled the value inside the box is not restricted to a percentage.

---

If locks are changed while in the auto-select dialog the calibrate button must be used to select the box in the client screen.

Some applications may require that you right-click to copy to the clipboard. In this case, select **Use Right Click to copy selection** to automatically trigger the right-click action when a screen is selected.

If the **Disable text-based hotspots** option is selected, scraping from text screens will be faster. It will also disable hotspots as well. This setting should be used whenever a text-based application does not require using hotspots. This option is disabled by default.

Click **OK** when you have completed configuration.

## DDE

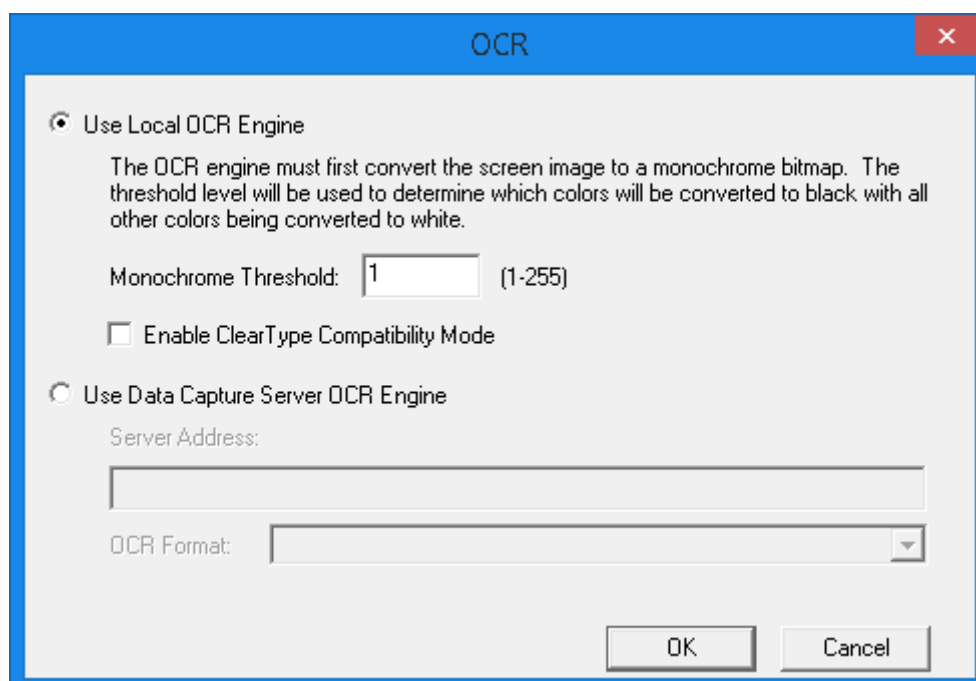
The screenshot shows a dialog box titled "DDE" with a blue header bar and a red close button in the top right corner. The main area has a light gray background and contains the following text: "Some applications support DDE and AppEnabler can request contents through DDE links. Please provide services, topics and items or select from the lists." Below this text are two side-by-side panels. The left panel is titled "Copy Screen Content" and the right panel is titled "Request Cursor Position". Each panel contains three dropdown menus: "Service:", "Service Topic:", and "Topic Item:". At the bottom of the dialog are two buttons: "OK" and "Cancel".

The **DDE** setting should be used for text-based applications that do not communicate with the clipboard. DDE is the preferred method to use with text-based applications. DDE should be used and only if this fails should the clipboard method be used. In order to configure the DDE tab, you need to know the **Service**, **Service Topic**, and **Topic Item** for screen contents and cursor positions. These may be listed in the drop-down lists; otherwise, check server references and input manually.

Another use for the DDE setting is if you want to configure multiple hotspots on a text-based application that could potentially have the same value. Without the use of the DDE setting, the first instance of the value scraped would be used. Using the DDE option can help identify where on the screen the value was scraped from.

Click **OK** when you have completed configuration.

## OCR



The OCR configuration dialog box has a blue title bar with the text "OCR" and a red close button. It contains two radio button options. The first option, "Use Local OCR Engine", is selected. Below it is a text box for "Monochrome Threshold" with the value "1" and a range "(1-255)". There is also an unchecked checkbox for "Enable ClearType Compatibility Mode". The second option, "Use Data Capture Server OCR Engine", is unselected. Below it is a text box for "Server Address:" and a dropdown menu for "OCR Format:". At the bottom right are "OK" and "Cancel" buttons.

OCR

☒ Use Local OCR Engine

The OCR engine must first convert the screen image to a monochrome bitmap. The threshold level will be used to determine which colors will be converted to black with all other colors being converted to white.

Monochrome Threshold:  (1-255)

☐ Enable ClearType Compatibility Mode

☐ Use Data Capture Server OCR Engine

Server Address:

OCR Format:

OK Cancel

The **OCR** setting must be used if you are configuring Application Enabler to use OCR with this application.

1. Select which OCR engine should be used.
  - To use the native OCR engine, select **Use Local OCR Engine**.
  - To use the Data Capture Server OCR engine, select **Use Data Capture Server OCR Engine**.

---

**Note:** Select **Enable ClearType Compatibility Mode** or use the Data Capture Server OCR engine if the application you are enabling uses ClearType fonts.

---

**Note:** Additional licensing and configuration is required in order to use the Data Capture Server for OCR processing. See [Data Capture Server on page 326](#) for information.

---

2. If you selected **Use Local OCR Engine**, configure the **Monochrome Threshold** value, if necessary. The Monochrome Threshold value is internally used by the local OCR engine. For most applications, the default value of **1** will be sufficient. Modify this value only when the default value does not work for the screens in your application.
3. If you selected **Use Local OCR Engine**, and the application you are enabling uses ClearType fonts, select **Enable ClearType Compatibility Mode**.
4. If you selected **Use Data Capture Server OCR Engine**, configure the following settings:
  - **Server Address** - Enter the server address for the Data Capture Server. The server address must be the net.tcp address to the Data Capture Server, for example:  
`net.tcp://localhost:9050/Hyland.DataCapture.ServiceManager/service`
  - **OCR Format** - Select the OCR format to be used.

---

**Note:** For information on configuring OCR formats, refer to the **Full-Page OCR** module reference guide.

---

5. Click **OK** when you have completed configuration.

## Save and Close

Save the configuration by clicking **Save**. After saving the current configuration, Application Enabler Configuration automatically performs a health check of the configuration file. This health check helps identify configurations that may be invalid.

For example, if you configure a retrieval or indexing context but do not configure a Document Type, you will be prompted that your configuration may be invalid.

Any health check warnings that are presented are saved to a text file in the same location as the XML configuration file. This file is named **[name of XML configuration file].xml.warning.txt**.

Be sure that the directory that you save the configuration file in is available to all users that will need to use Application Enabler in conjunction with the enabled application. Click **Save**.

---

**Note:** A single Application Enabler configuration file is limited to 30 enabled applications.

---

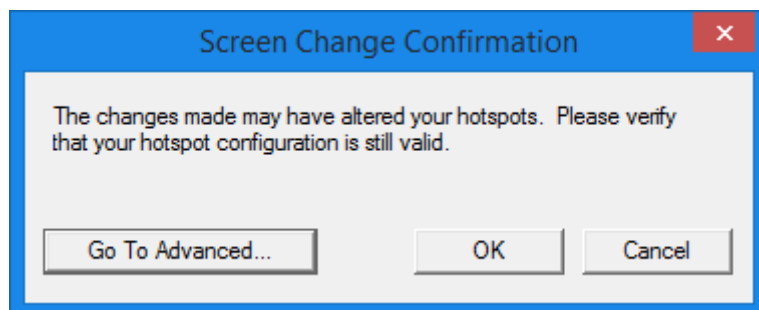


## Opening Existing Configurations

Refresh Application Enabler by closing and restarting the application. Open the configuration file by selecting **Load Configuration** in Application Enabler. Enable the event capturing process and test your configuration to ensure that it retrieves the desired documents.

## Editing Existing Configurations

When you change an existing configuration file, changes made may affect existing hotspot configuration. When a configuration change may have affected a hotspot configuration, the following dialog box is displayed.



Click **OK** to continue with the configuration.

Click **Go To Advanced** to go to the **Hotspots Configuration** dialog box to confirm the configuration changes are correct.

Click **Cancel**, to cancel your changes.

## Enabling Applications Using OCR

---

**Caution:** ASCII characters are supported for use with Application Enabler OCR. Multi-byte character sets, such as Japanese, are not supported for use with Application Enabler OCR.

---

Application Enabler can OCR screens that can otherwise not be enabled. Although OCR configuration is done through text-based screen configuration, Windows, HTML-based, Java, and Microsoft Dynamics GP applications can also be enabled with OCR.

When an application is enabled with OCR, a screen shot is taken and OCR is performed instead of writing data to the Windows clipboard. Keywords are mapped to the text rendition of this screen shot, just as they are when using a standard text-based screen.

---

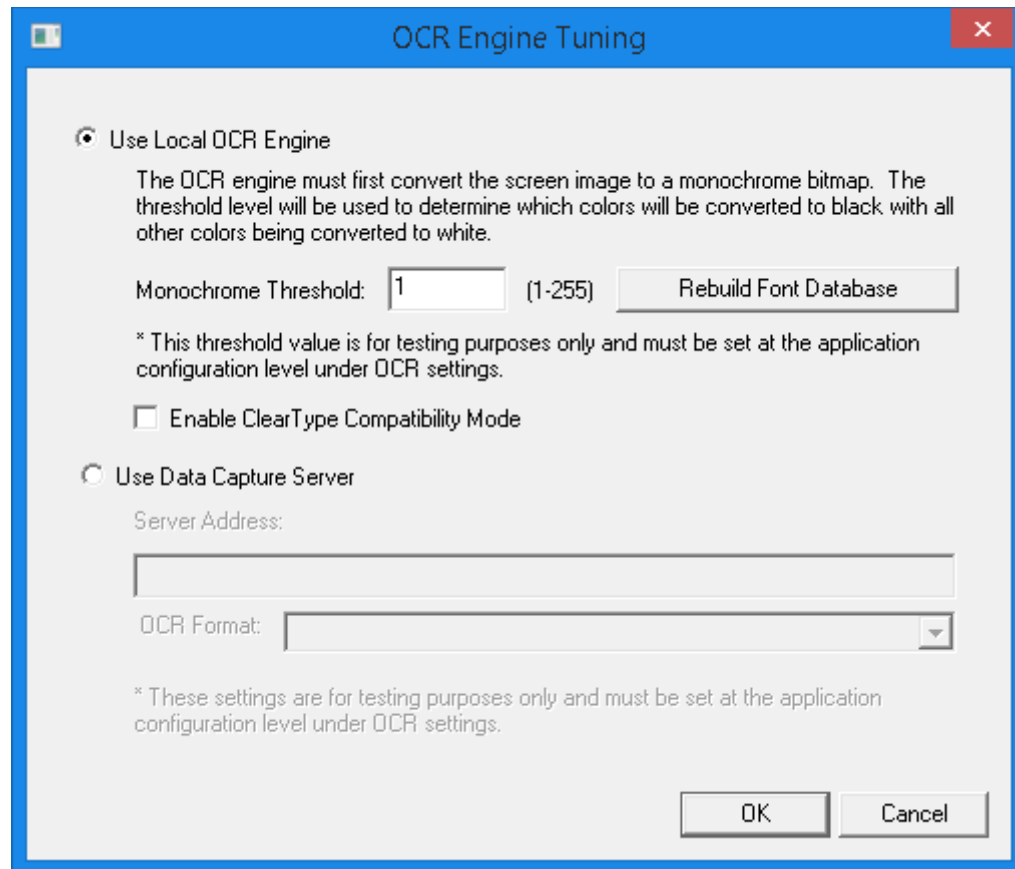
**Note:** In instances where Windows applications contain sub-screens or group boxes, Application Enabler performs OCR on the configured screen.

---

To configure OCR for use with Application Enabler:

1. Open the line-of-business application to be enabled.
2. Open Application Enabler Configuration.

3. Click the **New Text-Screen** button or the **Configure a new Text screen** toolbar button.
4. Capture the first screen you wish to enable.
5. In the **Configuration Text-based Screen** dialog box, click **View OCR text**.
6. The **OCR Engine Tuning** dialog box is displayed:



7. Select which OCR engine should be used.
  - To use Application Enabler's local OCR engine, select **Use Local OCR Engine**.
  - To use the Data Capture Server OCR engine, select **Use Data Capture Server OCR Engine**.

---

**Note:** Additional licensing and configuration is required in order to use the Data Capture Server for OCR processing. See [Data Capture Server on page 326](#) for information.

---

8. If you selected **Use Local OCR Engine**, configure the **Monochrome Threshold** value, if necessary. The Monochrome Threshold value is internally used by the OCR engine. For most screens, the default value of **1** will be sufficient. Modify this value only when the default value does not work your screens.

---

**Note:** This **Monochrome Threshold** value is for testing purposes only. The **Monochrome Threshold** value that will be used by Application Enabler must be set at the application configuration level. For more information, see [OCR on page 124](#).

---

9. Click **Rebuild Font Database** to rebuild the font database which the OCR engine requires to do OCR parsing. Once the font database is built, a file named **OCRSDK.pat** is generated in the %TMP% folder. %TMP% refers to the path specified by the TMP environment variable in Windows. The font database should be rebuilt each time users install new fonts on their workstations. For information about adding missing fonts, see [OCR Issues on page 26](#).
10. If the application you are enabling uses ClearType fonts, select **Enable ClearType Compatibility Mode** to enable OCR of ClearType fonts.
11. If you selected **Use Data Capture Server OCR Engine**, configure the following settings:
  - **Server Address** - Enter the server address for the Data Capture Server. The server address must be the net.tcp address to the Data Capture Server, for example:  
net.tcp://localhost:9050/Hyland.DataCapture.ServiceManager/service
  - **OCR Format** - Select the OCR format to be used.

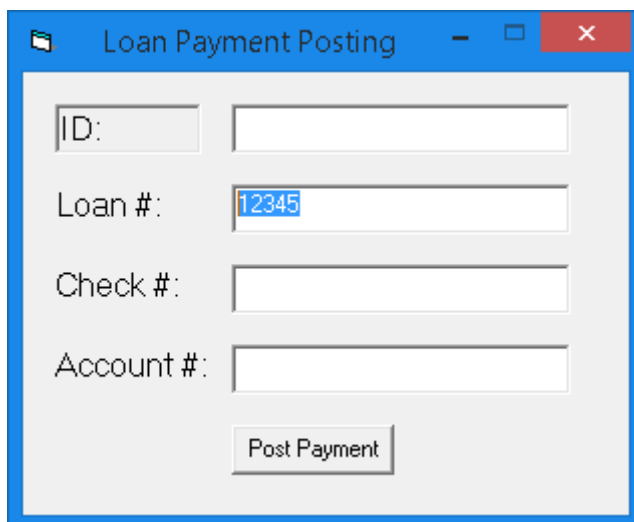
---

**Note:** These **Server Address** and **OCR Format** values are for testing purposes only. The values that will be used by Application Enabler must be set at the application configuration level. For more information, see [OCR on page 124](#).

---

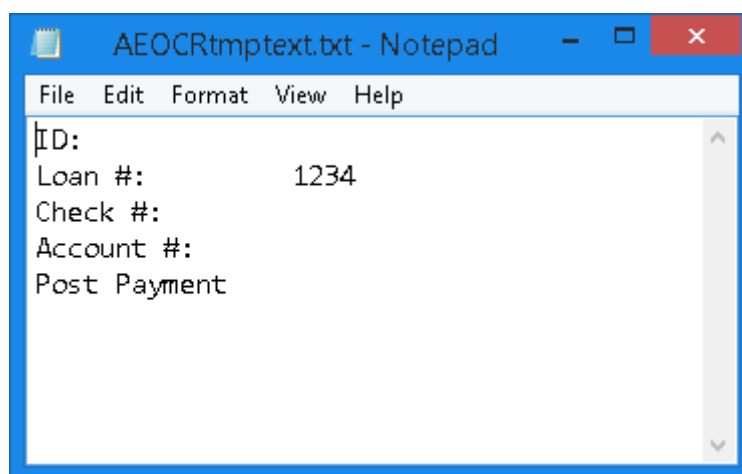
12. Click **OK** to view the text recognized by the OCR engine.

For example, when configuring OCR for the following screen:



The screenshot shows a window titled "Loan Payment Posting". It has four text input fields arranged vertically. The first field is labeled "ID:" and is empty. The second field is labeled "Loan #:" and contains the text "12345". The third field is labeled "Check #:" and is empty. The fourth field is labeled "Account #:" and is empty. Below these fields is a button labeled "Post Payment".

The following results are displayed:



The screenshot shows a Notepad window titled "AEOCRtmp.txt - Notepad". The text inside the Notepad window is as follows:

```
ID:
Loan #:      1234
Check #:
Account #:
Post Payment
```

13. Close the OCR results text file and continue configuring the application as you would a text-based application. For further instructions, see [Enabling Text-Based Applications on page 126](#).

## Configuring Hotspots

A hotspot enables a line-of-business application edit field to return a subset of results based on information specific to a single field. For example, to enable a line-of-business application to return documents based on **Account #** only, configure the **Account #** field as a hotspot. If no hotspots have been configured on a line-of-business application, results are displayed only if they match all enabled fields on the line-of-business application screen.

Configuring hotspots can make indexing specific to different Document Types. Each hotspot can be associated with a different Document Type. When a hotspot is initiated, the document will be indexed using the associated Document Type. To configure hotspots, click **Advanced** in Application Enabler Configuration.

---

**Caution:** Some limitations for text-based applications exist. Mapping multiple hotspots that could contain the same value will return results based on the first instance of the value, regardless of the hotspot that was selected. Using stripping, parsing, or appending can aid in differentiating between the different hotspot values. Use the DDE option whenever possible to avoid this limitation.

---

## Selecting a Hotspot

Creating a subset of Keyword Types or WorkView attributes for retrieval can be accomplished by adding the Keyword Types or WorkView attributes to the **Selected** list. By default, the << **Screen** >> hotspot is selected. This means that the entire enabled screen is a hotspot.

To define a hotspot for a Keyword Type or WorkView attribute in the **Hotspots Configuration** dialog box:

1. Select it from the list in the **Available** field.
2. Click **Add**.

## Select Folder Type, Keyword Values Used, Document Types, Keyword Types, Date Parameters, and Other Elements

The **Hotspot Configuration** screen appears after you select each hotspot.

1. The **General** tab contains options for retrieval or creation.

---

**Note:** If you configure a Folder, Custom Query, E-Form, Workflow, or WorkView context without configuring a corresponding hotspot, you are prompted each time you save your configuration.

---

- a. If you would like to retrieve documents using a custom query, select the appropriate **Custom Query** from the drop-down list. Folder Type custom queries are not supported, and are not available from the **Custom Query** drop-down list. This option is used in conjunction with Custom Query contexts. When using this option, the Document Type(s) that documents are retrieved from are determined by the Document Types configured for the selected custom query. The Document Types configured for Application Enabler do not affect the documents retrieved using the defined Custom Query for the Custom Query context.

---

**Note:** When using Application Enabler to retrieve documents using a Custom Query, all values associated with the Custom Query must be provided by Application Enabler. Application Enabler cannot pull values from HTML Forms being used for the Custom Query.

---

- b. If you want to create an E-Form upon a scrape event, select the appropriate Document Type from the **E-Forms** drop-down list. If you want the E-Form to be created as a Virtual E-Form, select the **Virtual E-Form** check box. If you want the E-Form that is created to display after the screen scrape, select the **Display E-Form after scrape event** check box.
- c. If you want to create a Unity Form upon a scrape event, select the appropriate Unity Form from the **Unity Forms** drop-down list.

---

**Note:** Repeating sections on Unity Forms and property controls such as **Created By**, **Current User's Display Name**, etc., are not supported for use with Application Enabler.

---

- d. If you want to retrieve documents from a Workflow life cycle or queue, configure the **Workflow** section of the tab. If you want to retrieve from a life cycle, select the appropriate item from the **Life Cycle** drop-down list and leave the **Queue** drop-down list as **<<any>>**. This configuration will allow users to select the queue they want to open upon scraping. If you want to specify a specific queue to retrieve from, select the appropriate **Life Cycle** from the drop-down list and the appropriate **Queue** from the drop-down list. If you want the first document listed within a queue to be selected and displayed, select the **Select the first document in the queue** option. When this option is not selected, Application Enabler will attempt to find a document within the selected queue that has keyword values that match the values that are scraped. The first document found with matching keyword values within the queue will be selected and display.

If you select **<<auto find>>** from the **Queue** drop-down list, Application Enabler will automatically try to find the document in the queues of the selected life cycle. If scraped values match a single document, the matching document is opened in Workflow. If scraped values match multiple documents, the first document that matches in the life cycle is opened in Workflow. If scraped values do not match a document, Workflow opens, but no document is displayed. A blank scrape will display the first document of the first queue.

---

**Note:** If the **Auto Find** button is clicked when executing Workflow Retrieval from Application Enabler, the **Select the first document in the queue** option will be ignored. The **Auto Find** button is only available when **<<any>>** is selected from the **Queue** drop-down list.

---

- e. If you want to perform WorkView retrieval or object creation, configure the **WorkView** section of the tab. Select a WorkView application from the **Applications** drop-down list, a class from the **Classes** drop-down list, and a filter from the **Filters** drop-down list. The application, class, and filter should match your WorkView configuration in the **Keyword Type Configuration** dialog box.

---

**Note:** External Extension class objects cannot be created using Application Enabler.

---

---

**Note:** If you selected a WorkView attribute in the **Hotspots Configuration** dialog box, the application and class associated with the attribute are displayed.

---

If you want to display the WorkView object after creating it, select the **Display WorkView object after creation** check box.

---

**Tip:** Ensure that you consider any scripting that will be performed on newly created WorkView objects when configuring these settings.

---

- f. If you want all Keyword Values scraped from the screen for indexing when the selected hotspot is initiated, select **Include all configured keywords when posting events from this screen**. If you only want the Keyword Types scraped that are configured for a hotspot in the **Keyword Types** tab, clear this check box.

---

**Note:** This check box does not affect values used for retrieval.

---

2. Click the **Document Composition** tab if you want to create a document with the Document Composition module using the selected hotspot. See [Configuring Document Composition on page 281](#) for more information.
3. Click the **Folders** tab if you want to retrieve a Folder or a Document Tracking Folder using the selected hotspot.  
If you would like to retrieve from a folder type using the selected hotspot, select the appropriate folder type from the **Folder** drop-down list. This option is used in conjunction with all Folder Retrieval contexts. To retrieve from a Document Tracking folder type, select the appropriate folder type from the **Document Tracking Folder** drop-down list. This option is used in conjunction with all Document Tracking Folder Retrieval contexts.
4. Click the **Contexts** tab to add an adaptive context for this hotspot. See [Configuring Adaptive Contexts on page 282](#) for more information.

---

**Note:** When an adaptive context is added, its configured keyboard or mouse event will override the same keyboard or mouse event if it is also configured at the application level. For example, if you configure the enabled application to perform the Retrieve Documents action using a Shift+Left Click event, and configure a hotspot to perform the Run Custom Query action using a Shift+Left Click event, the Run Custom Query action will override the Retrieve Documents action.

---

5. Click the **Document Type(s)** tab, select one or more Document Type that you wish to retrieve documents from based on information entered in the line-of-business application hotspot. To filter available Document Types by Document Type Group, select a Document Type Group from the **Filter By** drop-down list.
6. Click the **Keyword Types** tab to associate one or more keyword types with the hotspot.
7. Click the **Live** tab to configure the selected hotspot for use with Application Enabler Live. When the **Allow Live Document Retrieval from this hotspot** check box is selected, the hotspot can be used with Application Enabler Live.
  - a. When the **Allow exceptions from this hotspot** check box is selected, exceptions can be displayed to a user when mousing over the selected hotspot in Application Enabler Live. De-selecting the check box will not display exceptions to the user for the selected hotspot. By default, this check box is automatically selected.
8. Click the **Date** tab if you want to specify date parameters for retrieval using the selected hotspot. See [Setting Date Parameters for Retrieval on page 284](#) for more information.

9. Click the **Memorization** tab if you want to store scraped keywords for later use on subsequent scrape events. See [Configuring Memorization on page 284](#) for more information.
10. Click the **Other Elements** tab to configure custom actions. See [Creating a Custom Element for Sorting Documents upon Scrape on page 312](#) for more information.
11. Click **OK** when your selection is complete. Application Enabler Configuration returns you to **Hotspots Configuration** dialog box. Repeat the above steps for each hotspot you wish to configure. These configuration settings can be modified at any time by clicking **Settings** in the **Hotspots Configuration** dialog box.
12. Click **OK**.

## Configuring Document Composition

You can create a document with the Document Composition module using the selected hotspot.

Before configuring Document Composition, ensure you are familiar with the following:

- To use Application Enabler to create documents with the Document Composition module, you must create a Document Composition template that contains Keyword Placeholders. For more information, see the Document Composition documentation.
- Application Enabler settings override the Document Composition template settings.
- Keywords from the Application Enabler scrape event will be used to index the Document Composition document, regardless of whether keyword mapping is configured on the Document Composition template.
- The Keyword Placeholder cannot be used with a Healthcare Module Keyword Type, or a **WorkView** attribute.
- When multiple instances of the same keyword are received from the Application Enabler scrape event, the configured Document Composition Placeholder is populated by the original instance. For example, PO# and PO#(01) are received from the Application Enabler scrape event. In this example, only PO# will be used. PO#(01) will be discarded.
- Document Type rights are ignored when uploading a Document Composition document. This means that a user can upload a Document Composition document into a Document Type that they do not have rights to access.

To configure Document Composition:

1. Select the hotspot and click **Settings**.
2. Select the **Document Composition** tab.
3. Select the appropriate **Document Composition Template** from the drop-down list. Select **<Select at Run Time>** if the user should be prompted to select a template in the **Select Template Options** dialog box after the Application Enabler scrape event.



4. Select **Use All Settings Configured for Template** to adhere to the configured template settings, or select **Override Template Settings with the Following:** to override these settings.

---

**Note:** To enable **Force Preview** and **Storage Options**, the **Override Template Settings with the Following:** option must be selected. To enable **Disable Import Dialog**, both **Force Document Type** and **Inherit Keywords When Indexing Document** must be checked. When **Inherit Keywords When Indexing Document** is selected, the keywords scraped by Application Enabler will be used to index the document. For information on the additional Document Composition settings on this screen, see the Document Composition documentation.

---

5. If you want to view the document after it is archived, select **View Document After Archiving**.
6. Click **Copy All Options from Template** to copy all of the settings of the current template to the override settings.
7. Click **OK**.

### *Configuring the Context to Not Prompt for Template Selection*

If you want the context to be initiated without prompting the user to select the template that should be used, you must select a template from the **Document Composition Template** drop-down list. You must also configure the template settings in the following way when **Override Template Settings with the Following:** is selected:

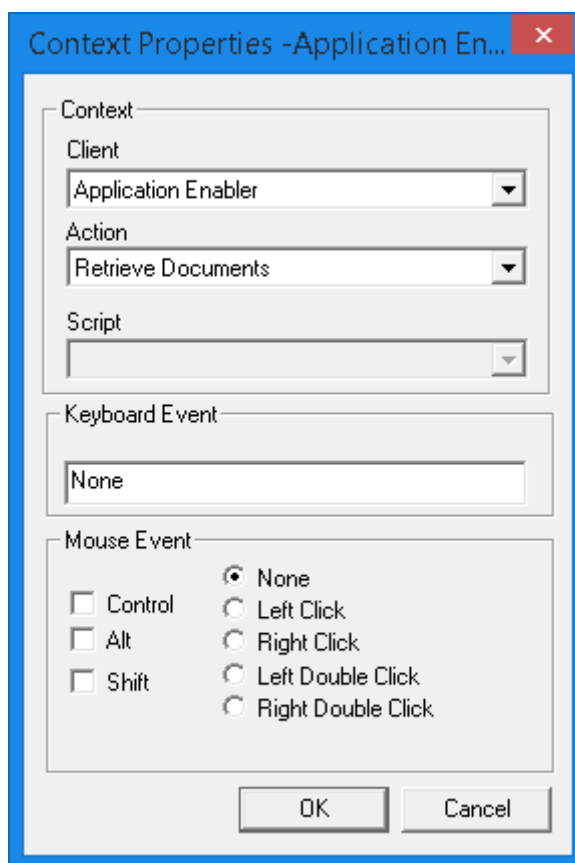
- **Force Preview** must be cleared.
- **Force Document Type** must be selected and a Document Type must be selected from the drop-down list.
- **Inherit Keywords When Indexing Document** must be selected.
- **Disable Import Dialog** must be selected.

### *Configuring Adaptive Contexts*

You can configure **Adaptive Contexts**, which are keyboard or mouse event contexts that occur at the hotspot level. This lets you create an environment that allows a user to perform one keyboard or mouse event to execute the same context via several different hotspots, or execute different contexts via several different hotspots. To configure adaptive contexts:

1. Select the hotspot and click **Settings**.
2. Select the **Contexts** tab.

- Click **New** to create a new mouse or keyboard event. The **Context Properties** dialog box is displayed:



- Select the OnBase client that will be used to execute the context from the **Client** drop-down list, and the action to be executed from the **Action** drop-down list. For more information on available clients and actions, see [Using Contexts on page 288](#).
- Depending on the action and context you have configured, you can select either a VBScript or a Unity Script to associate with the keyboard or mouse event from the **Script** drop-down list. The VBScripts and Unity Scripts that are available are those that have been configured for the database that is currently connected.
- To define a keyboard event used to trigger a search, place your cursor in the **Keyboard Event** field and type the desired keystroke or keystroke combination. For example, press **Ctrl** and **F5** simultaneously to define **Ctrl+F5** as a keystroke combination.
- To define a mouse event used to trigger a search, select the mouse event from the **Mouse Event** options (**Left Click**, **Right Click**, etc.). You can create a combination keystroke and click event by selecting the **Control**, **Alt**, or **Shift** options in addition to a click event.

When defining mouse events:

- It is recommended to use a keyboard key in addition to the **Left Click** and **Right Click** options. It is also recommended to not use similar mouse and keyboard events in the same application. For example, Shift+Left Click and Shift+Left Double Click.

- The **Left Double Click** and **Right Double Click** options are not supported when enabling a Java-based application.
  - The **Left Double Click** and **Right Double Click** options are registered as two single mouse clicks when enabling certain Smart-Screen applications. To enable these applications, use the **Left Click** or **Right Click** options.
8. Click **OK**. Adaptive contexts can be changed after configuration by opening an existing configuration and navigating back to the **Contexts** tab, selecting a context, and clicking **Edit**.

---

**Note:** When an adaptive context is added, its configured keyboard or mouse event will override the same keyboard or mouse event if it is also configured at the application level. For example, if you configure the enabled application to perform the Retrieve Documents action using a Shift+Left Click event, and configure a hotspot to perform the Run Custom Query action using a Shift+Left Click event, the Run Custom Query action will override the Retrieve Documents action.

---

## Setting Date Parameters for Retrieval

You can specify date parameters for retrieval for each hotspot. To specify date parameters:

1. Select the hotspot and click **Settings**.
2. Select the **Date** tab.
3. Specify a single date or a date range.
4. If you do not want users to be able to enter the date range via a prompt, select **Disable prompting retrieval date range dialog**. If this option is selected, the **Prompt for Date Range During Retrieval** option in Application Enabler is disregarded.
5. If you want the **Date Options** dialog box to display when the hotspot is initiated, allowing the user to specify a date range, select the **Always prompt retrieval date range dialog** option.
6. If you do not want users to be able to override the configured default date parameters for the selected hotspot, select **Disable overwriting the default retrieval date range of the hotspot**.
7. Click **OK**.

## Configuring Memorization

You can choose to memorize keywords for each hotspot. Memorizing keywords allows Application Enabler to store the scraped keywords for later use on subsequent scrape events. Memorized keywords allow for more flexibility when configuring applications that have associated keywords across multiple screens, and also allow for keywords to be memorized on some screens and/or hotspots while not being memorized on others.

Memorized keywords:

- Persist after a scrape event is fired. This means that after a scrape event is triggered, the memorized keywords can still be used on subsequent scrape events.

- Are replaced instead of appended. If a keyword is memorized, and the same Keyword Type is scraped again, the memorized Keyword Value will be replaced with the newly scraped Keyword Value.

If the same Keyword Type exists within the hotspot triggering the event and in the memorized cache, the Keyword Value scraped from the hotspot is used. If the hotspot triggering the event is not a memorizing hotspot, the Keyword Value is not updated in the memorized cache.

- Are appended to all Application Enabler contexts. There is no specific Application Enabler context that must be used to memorize keywords.

To specify memorization parameters:

1. Select the hotspot and click **Settings**.
2. Select the **Memorization** tab.
3. When **Memorize keywords only; user is unable to generate context events from this hotspot** is selected, any event that is generated from this hotspot will cause the keywords associated with this hotspot to be memorized. Select the **Allow user to generate context events from this hotspot** if the keywords will be memorized and the context event will also be fired.

For example, a hotspot has **Memorize keywords only; user is unable to generate context events from this hotspot** selected and the **Application Enabler - Retrieve Documents** context is configured. If **Allow user to generate context events from this hotspot** is not selected, the keywords will be memorized but the **Application Enabler - Retrieve Documents** search results list will not be displayed. If **Allow user to generate context events from this hotspot** is selected, the keywords will be memorized and the **Application Enabler - Retrieve Documents** search results list will be displayed.

---

**Note:** In Application Enabler Live, document retrieval does not occur for hotspots configured as **Memorize keywords only; user is unable to generate context events from this hotspot**. Keywords are still memorized.

---

4. When **Require previously memorized keywords when generating context events from this hotspot** is selected, users are warned when they generate an event that expects some keywords to come from memory. The warning is only displayed if no keywords have been memorized.

---

**Note:** This setting cannot be used to enforce memorization of specific keywords.

---

Select an option from the **Warning Level** drop-down list. When **Warn and continue** is selected, users are warned and allowed to continue. When **Warn and cancel** is selected, users are warned and the scrape event, including Application Enabler Live retrieval, is canceled.

5. When **Auto-clear all previously memorized keywords after generate context events from this hotspot** is selected, all memorized keywords are cleared after a scrape event occurs. When this setting is not selected, memorized keywords must be cleared manually.

## Configuration Changes

Once a line-of-business application screen is configured, little to no maintenance is required. The only time a configuration needs to be changed is when there is a:

1. Change in the line-of-business application screen interface.  
When a new version of the line-of-business application is installed, it may be necessary to reconfigure Application Enabler to recognize the new layout of screens and keywords. Only the line-of-business application screens that have changed need to be reconfigured.
2. Change in the line-of-business application's data format.  
If the format of a Keyword Value changes, it may be necessary to reconfigure screens that have been configured to retrieve documents based on the Keyword Type.  
For text-based applications, simply reconfigure the screen. When the keyword mapping screen is reached, select **Settings** and change the options accordingly. For other applications, the screen must be deleted and reconfigured and the keyword settings modified to accommodate the change in keyword format.
3. Change in the line-of-business application's functionality.  
If the way a line-of-business application screen functions changes, it may be necessary to reconfigure the application.  
For example, if a new version of a text-based line-of-business application changes the way the Copy to Clipboard operates, it would be necessary to reconfigure the Copy to Clipboard keyboard sequences to match the new sequence.
4. Need to enable more screens than were initially configured.  
To add additional screens to an existing configuration, open the configuration and enable the new screens.
5. Need to change the documents that are retrieved or indexed.  
To retrieve different documents from an application screen, reconfigure the screen.
6. Change in the indexing method.  
For example, a user initially sets up Application Enabler to scrape a single primary keyword, making use of the AutoFill Keyword Set feature to populate remaining Keyword Values. If you no longer want to use the AutoFill Keyword Set, reconfigure the screen.

## Setting a Default Configuration

You can set a default configuration file to be opened when Application Enabler is launched in one of the following ways:

- [Using a Command Line Switch](#)
- [Using the Unity Client Configuration File](#)

If both are configured, the shortcut icon command is used.

## Using a Command Line Switch

To automatically load a saved configuration when Application Enabler is opened, add the - **AE:"[full file path]"** switch to the Unity Client shortcut **Target** command line. The path to the configuration file can be a local path, UNC path, or URL.

When a default configuration is specified, the configured screen is enabled on startup.

---

**Note:** When a URL is specified for a file, the file is downloaded to the temporary directory from its specified location and the temporary file is opened.

---

## Using the Unity Client Configuration File

To automatically load a saved configuration when Application Enabler is opened, specify the **DefaultConfigFile** attribute in the Unity Client configuration file. For more information, see the Installation chapter in the Application Enabler or Unity Client module reference guide.

## AECCommServer

AECCommServer is a communication server that communicates data to Application Enabler when using the following contexts:

- Desktop - Index

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**Note:** This context is maintained for legacy purposes only.

---

- Disconnected Scanning - Cancel Index
- Disconnected Scanning - Index
- Front Office Scanning - Index
- Web Client - Cancel Index
- Web Client - Index
- Web Client - Retrieve Folders

When Application Enabler is launched, AECCommServer is automatically launched and running in the background. Likewise, the OnBase Client can launch AECCommServer when the appropriate switch is applied. This server can also allow third-party applications to communicate with the OnBase Client module through scripting, bypassing Application Enabler. AECCommServer can also be utilized to create data sets for Front Office Scanning using third-party applications and scripting.

## Configuring the Web Client to Use Application Enabler

For Application Enabler to work with the Web Client, you must set a specific setting on the Web Server. In the **web.config** file the following parameter must be set equal to **true**:  
**sv\_AppEnableIntegration**

For Application Enabler to automatically launch when the user enters an Application Enabler supported feature, you must set the following parameter to **true**: **sv\_LaunchAppEnabler**

The following is an example from a **web.config** file configured for use with Application Enabler:

```
<!-- AppEnabler Vars -->
<add key="sv_AppEnableIntegration" value="true"/>
<!-- Enable/disable AppEnabler integration -->
<add key="sv_LaunchAppEnabler" value="true"/>
```

---

**Note:** You can also configure these parameters using the Web Application Management Console.

---

## Authenticode Signature Verification

Authenticode is a Microsoft technology that uses digital certificates to identify the publisher of an application to ensure the application's integrity and to verify that the software has not been infected by any malware since it was created.

Signature verification is disabled by default because, depending on the speed of your network connection and other factors, the signature verification check may take a noticeably long time. This causes the application to take longer to launch.

---

**Note:** For more information on this topic, see: <http://support.microsoft.com/kb/936707>.

---

To enable signature verification:

1. Locate the application's **.config** file.
2. Open the file for editing in a plain-text editor, such as Notepad.
3. Locate the **generatePublisherEvidence** element.
4. Change the **enabled** attribute to **true**:  
`<generatePublisherEvidence enabled="true"/>`
5. Save and close the file.

## Using Contexts

There are many applications that work with Application Enabler. Each can work in different ways. The following are system interaction contexts used for certain mouse and keyboard events with Application Enabler.

---

**Note:** Contexts that trigger indexing or upload actions cannot be used with Multi-Instance Keyword Type Groups.

---

When a context is chosen, only the configured Application Enabler functionality available for the context's module will execute using the selected mouse or keyboard event. Contexts are configured on a screen-by-screen basis for specific mouse and keyboard events.

When configuring contexts, you select the OnBase client that will be used to execute the context, and then the action that will be performed. These clients and actions are described in the following sections:

- [Application Enabler Contexts](#)
- [Bar Code Generator Contexts](#)
- [Desktop Contexts](#)
- [Disconnected Scanning Contexts](#)
- [Front Office Scanning Contexts](#)
- [Office Integration Contexts](#)
- [OnBase Client Contexts](#)
- [RAC Audit Contexts](#)
- [Web Client Contexts](#)

For Application Enabler to function, settings in the Unity Client's configuration file must be configured. These settings can be configured manually. Some can also be configured during the Unity Client's ClickOnce installation process.



The following attributes in the **<ApplicationEnabler>** tag are related to the Application Enabler module.

Attribute	Corresponding ClickOnce Option	Description
<b>EnableHandlingUnityClientEvents</b>	<b>Unity Features - Application Enabler</b>	<p>When set to <b>true</b>, the Unity Client can receive scrape events from Application Enabler.</p> <p>When set to <b>false</b>, the Unity Client cannot receive scrape events from Application Enabler.</p> <hr/> <p><b>Note:</b> You must manually add this attribute to the <b>&lt;ApplicationEnabler&gt;</b> tag. When this attribute is not present, it is treated as <b>true</b>.</p> <hr/>

Attribute	Corresponding ClickOnce Option	Description
<b>DefaultConfigFile</b>	<b>Default Configuration File</b>	<p>To automatically load a saved configuration when the Unity Client is opened, specify the full path to the file. The path to the configuration file can be a local path, UNC path, URL (HTTP or HTTPS), or a URN. When a default configuration is specified, the configured screen is enabled on startup. To start Application Enabler, click <b>AppEnabler</b>.</p> <hr/> <p><b>Note:</b> When a URL is specified for a file, the file is downloaded to a temporary directory from its specified location and the temporary file is opened. Any time the configuration file on the server is modified, you must restart IIS or reset the cache of the OnBase Application Server for changes to take effect.</p> <hr/> <p><b>Note:</b> To specify a custom temporary directory, create environment variable <b>ONBASETEMP</b> in the Windows Environment Variables configuration window, and enter the desired path in the <b>Variable value</b> field.</p> <hr/>

Attribute	Corresponding ClickOnce Option	Description
<b>UsePersistentWindowForRetrieval</b>		<p>When set to <b>true</b>, the Application Enabler - Retrieve Documents context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Retrieve Documents context uses a new window each time it is triggered. The window's size and position are not retained.</p>
<b>UsePersistentWindowForCustomQuery</b>		<p>When set to <b>true</b>, the Application Enabler - Run Custom Query context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Run Custom Query context uses a new window each time it is triggered. The window's size and position are not retained.</p>
<b>UsePersistentWindowForEformCreation</b>		<p>When set to <b>true</b>, the Application Enabler - Create New E-Form context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Create New E-Form context uses a new window each time it is triggered. The window's size and position are not retained.</p>

Attribute	Corresponding ClickOnce Option	Description
<b>UsePersistentWindowForFolderRetrieval</b>		<p>When set to <b>true</b>, the Application Enabler - Retrieve Folders context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Retrieve Folders context uses a new window each time it is triggered. The window's size and position are not retained.</p>
<b>UsePersistentWindowForWorkflowRetrieval</b>		<p>When set to <b>true</b>, the Application Enabler - Retrieve in Workflow context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Retrieve in Workflow context uses a new window each time it is triggered. The window's size and position are not retained.</p> <hr/> <p><b>Note:</b> In order for this attribute to work correctly with Workflow Retrieval, you must enable <b>Allow multiple instances of the Workflow layout</b> in the Unity Client's Workflow User Options.</p> <hr/>

---

**Note:** Persistent windows are shared among all contexts. For example, the **Application Enabler - Retrieve Documents** and **Application Enabler - Run Custom Query** contexts are configured to use the same Unity Client window each time they are triggered. If you trigger the **Application Enabler - Retrieve Documents** context and then trigger the **Application Enabler - Run Custom Query** context, the **Application Enabler - Run Custom Query** context will use the same window that the **Application Enabler - Retrieve Documents** context previously used.

---

---

**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.

---

## Application Enabler Contexts

Application Enabler contexts are executed using the native Application Enabler viewer.

### Compose Document

Event triggers document creation using the Document Composition module upon screen scrape. This context requires additional configuration on the **Document Composition** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Document Composition on page 281](#).

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**Note:** This context ignores any scraped Document Types.

---

---

**Note:** This context can be configured with the **Document Composition - Template Name** keyword in order to select the Document Composition template when composing documents.

---

This context can be configured to use Document Composition Placeholders of the XML Path type as keywords.

To configure, select the appropriate Document Composition template from the **Filter By Type** drop-down list, and then add the appropriate Placeholder Keyword types.

---

**Note:** Only a single instance of a Placeholder Keyword can be added.

---

## Create New E-Form

Event triggers E-Form creation upon screen scrape. This context requires the configuration of an E-Form in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#).

## Create New Unity Form

Event triggers Unity Form creation upon screen scrape. This context requires the configuration of a Unity Form in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#).

## Create WorkView Object

Event triggers the creation of a WorkView object. This context requires the configuration of a WorkView application in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#).

## FolderPop

Event triggers retrieval of a folder using FolderPop.

### Requirements for Using FolderPop Retrieval

---

**Note:** When this context is executed, Application Enabler can only open an Internet Explorer window and will not respect the default browser of the workstation.

---

In order for the **Application Enabler - FolderPop** context to function correctly, the **<FolderPop>** setting in the Unity Client configuration file must be set appropriately.

The **url** attribute must be set equal to the path to the FolderPop.aspx page.

If you want FolderPop to use the same window each time it is triggered, the **openInNewWindow** attribute must be set to **false**.

When **sendSessionID** is set to **true**, users are required to log in to the Unity Client for the first FolderPop scrape event. Subsequent FolderPop scrape events do not require an additional log in.

When **sendSessionID** is set to **false**, for every subsequent FolderPop scrape event, users must log into FolderPop. If you are using Active Directory authentication, LDAP authentication, or Single Sign On, and the **sendSessionID** is set to **false**, a new session will be used every time the user does a FolderPop scrape event. The user will not have to log in manually, but a new session and a license will be consumed for each scrape event. If you are not using Active Directory authentication, LDAP authentication, or Single Sign On and **sendSessionID** is set to **false**, to avoid requiring the user to login for each folder retrieval, a default login needs to be configured.

The **useURL** attribute controls whether scraped data is appended to the URL. When **useURL** is set to **true**, scraped data is appended to the URL. If the length of the scraped data is larger than the maximum length of the URL, the data may be truncated. When **useURL** is set to **false**, scraped data is not appended to the URL.

---

**Tip:** Set **useURL** to **true** to use FolderPop when Windows UAC is enabled.

---

The **Application Enabler - FolderPop** context does not support multiple instances of a single keyword and will always use "and" as an operator to join Keyword Values together for retrieval. All scraped Keyword Values must match the values associated with a folder in order for a folder to be returned. It will always compare Keyword Values scraped to the folders Keyword Values using the "=" operator.

In addition, the datasource must be set for FolderPop in the **Hyland.Web.FolderPop** element of the Web Server's **web.config** file. The following must be set to a valid datasource. The following is an example, where DATASOURCE represents the name of a valid ODBC datasource:

```
<add key="datasource" value="DATASOURCE"></add>
```

---

**Note:** This **web.config** setting is located in the **Hyland.Web.FolderPop** element. There are other **web.config** settings named **datasource**, but they are located in different elements.

---

Regardless of the datasource specified for FolderPop, Application Enabler will use the datasource that is specified for the service it is using to connect. The **datasource** setting is required for the FolderPop context to work, but it can differ from the datasource Application Enabler is using. This configuration allows the standard FolderPop integration to maintain a specific datasource that will be used for FolderPop retrieval outside of Application Enabler retrieval.

## Generate Document Packet

Event triggers the generation of a document packet upon screen scrape.

---

**Note:** This context requires the configuration of a Document Packet template in OnBase Configuration module and OnBase Studio, and a Document Packets license. For more information, see the **Document Packaging** module reference guide.

---

In order to generate document packets, you must have the **>>Document Handle - From** Keyword Type configured.

---

**Note:** If either the **DocumentPacket Generation - Template ID** Keyword Type or the **DocumentPacket Generation - Template Name** Keyword Type are configured, the specified packet template is selected automatically.

---

## Index

Event triggers an indexing action.

---

**Note:** You must select a Document Type during Application Enabler configuration in order to use this context.

---

This context can be used to scrape values in to the following areas:

- The **Add/Modify Keywords** pane.
- The **Re-Index** pane, including the re-indexing user interaction window that is displayed when executing the Workflow **Doc - Re-Index Document** action. For more information on this action, including information on configuration options within this action that are specific to using Application Enabler, see the Workflow module reference guide.
- The **Scanning** pane in the Document Imaging module's **Batch Indexing** layout.
- The **Upload** pane, including the indexing user interaction window that is displayed when executing the Workflow **SYS - Import Document** action.
- **Unity Forms**
- **E-Forms** while in **Workflow**.

---

**Note:** Additional configuration steps are necessary in order to allow values to be scraped into E-Forms in Web Workflow. Contact your first line of support for assistance.

---

- **User Forms** while in **Workflow**.

When using this context to populate index values when re-indexing documents in Workflow or in the Batch Indexing layout, users will be prompted by Application Enabler to select a Document Type unless:

- The Workflow **Doc - Re-Index Document** action's user interaction window is the only window displayed and the action is not configured to force Document Type selection.
- The Batch Indexing layout is the only window displayed and the scan queue is not configured to force Document Type selection.

## Patient Window

Event triggers screen scraping to retrieve chart documents using the OnBase Patient Window.

Requirements for Using OnBase Patient Window Retrieval

---

**Note:** When this context is executed, Application Enabler can only open an Internet Explorer window and will not respect the default browser of the workstation.

---



In order for the **Application Enabler - Patient Window** context to function correctly, the **Patient Window - MPI** or **Patient Window - MRN** Keyword Types must be selected for the Document Type on the **Keyword Type Configuration** screen in Application Enabler.

---

**Note:** The **Patient Window - MPI** and **Patient Window - MRN** Keyword Types are part of Application Enabler Configuration. You do not need to create these Keyword Types in the OnBase Configuration module.

---



---

**Note:** When used with Application Enabler, OnBase Patient Window allows medical records to be retrieved by MPI and/or MRN.

---

In addition, the **<PatientWindow>** setting in the Unity Client configuration file must be set appropriately.

The **url** attribute must be set to the path to the Login.aspx page on the web server.

If OnBase Patient Window should share sessions with the Unity Client and not require a log in every time a related context is triggered, the **sendSessionID** attribute must be set to **true**.

Additionally, when session sharing is enabled for OnBase Patient Window, a checksum is appended to the OnBase Patient Window URL. This adds an extra layer of security. For checksum validation to occur, **EnableChecksum** must be set to **true** in the OnBase Patient Window Web.config file. For more information on the **EnableChecksum** setting, see the Patient Window documentation.

If you want the patient information banner to be displayed, the **showBanner** attribute must be set to **true**. Additionally, you must create a custom element for the hotspot with the following values:

Custom Element Attribute	Value
XML Tag	PATIENTWINDOWURLATTRIBUTES
Name	bannerType
Value	Enter the banner's configured identifier. For example, if a banner has an identifier of <b>complete</b> , you would enter <b>complete</b> as the Value attribute.

OnBase Patient Window scrape events require users to log in to OnBase Patient Window.

For instructions on how to create a custom element, see [Creating a Custom Element for Sorting Documents upon Scrape on page 312](#).

## Retrieve Deficiencies

Event triggers screen scraping to be used to retrieve DeficiencyPop.

## Requirements for Using DeficiencyPop Retrieval

---

**Note:** When this context is executed, Application Enabler can only open an Internet Explorer window and will not respect the default browser of the workstation.

---

---

**Note:** To access charts through DeficiencyPop, users must have sufficient Medical Records Management privileges. See the Medical Records Management Solution module reference guide for information about required privileges for chart access.

---

In order for the **Application Enabler - Retrieve Deficiencies** context to function correctly, the **<DefPop>** setting in the Unity Client configuration file must be set appropriately. The **url** attribute must be set equal to the path to the DeficiencyPop login.aspx page.

If you want external deficiencies to be returned in the list, set the **external** attribute to **yes**. If you do not want to include external deficiencies, set the **external** attribute to **no**.

If you want DeficiencyPop to share sessions with the Unity Client and not require a log in every time a related context is triggered, the **sendSessionID** attribute must be set to **true**.

DeficiencyPop scrape events require users to log in to DeficiencyPop.

## Retrieve Document Tracking Folders

Event triggers Document Tracking folder retrieval using the Document Tracking interface.

This context requires the configuration of a Document Tracking folder in the **Folders** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#). In addition, you must select a Document Type during Application Enabler configuration that is associated with the Keyword Types assigned to the applicable Document Tracking folder.

## Retrieve Documents

Event triggers screen scraping to be used for retrieval using the Application Enabler viewer.

When Application Enabler is the selected client, this context is selected by default.

---

**Note:** The **>>Document Date** Keyword Type is ignored by this context.

---

## Retrieve Folders

Event triggers retrieval using the Folders interface.

This context requires the configuration of a folder in the **Folders** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#). In addition, you must select a Document Type during Application Enabler configuration that is associated with the Keyword Types assigned to the applicable folder.

## Retrieve in Workflow

Event triggers retrieval from a Workflow life cycle or queue. This context requires the configuration of a Workflow life cycle or queue in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#). Keyword Types configured will be used to retrieve specific documents within a queue.

---

**Note:** The **>>Document Date** Keyword Type is ignored by this context.

---

You can retrieve a single document in the Unity Workflow interface by specifying a value for the **>>Document Handle - From** Keyword Type.

---

**Note:** When using the **>>Document Handle - From** Keyword Type with this context, all other keywords that are passed in will be ignored.

---

## Retrieve Plan Review Projects

Event triggers a retrieval to be used with the Electronic Plan Review module.

In order for this context to function correctly, the **Project ID** Keyword Type must be selected for the Document Type on the **Keyword Types Configuration** screen in Application Enabler.

---

**Note:** The **Project ID** Keyword Type is part of Application Enabler Configuration. You do not need to create this Keyword Type in the OnBase Configuration module. If this Keyword Type already exists, you cannot use this context with this Keyword Type. You must use it with the **Project ID** Keyword Type is part of Application Enabler Configuration.

---

## Retrieve WorkView Objects

Event triggers retrieval from a WorkView application. This context requires the configuration of a WorkView application in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#).

## Run Custom Query

Event triggers retrieval using a defined custom query. This context requires the configuration of a custom query in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#). In addition, you must select a Document Type during Application Enabler configuration that is associated with the Keyword Types assigned to the applicable custom query.

---

**Note:** The **>>Document Date** Keyword Type is ignored by this context.

---

## Run Script

Event triggers execution of a VBScript.

Select a VBScript from the **VBScript** drop-down list. For a VBScript to be available from the **VBScript** drop-down list, it must be configured with the **Application Enabler** check box selected in the **Visible Scope** dialog box in the OnBase Configuration module. For more information on this dialog box, see the **System Administration** documentation.

## Run Unity Script

Event triggers execution of a Unity Script.

Select a Unity Script from the **Script** drop-down list. For more information on Unity Scripts, see the **Studio** module reference guide or Hyland SDK.

## Upload Document

Event triggers an upload action.

# Bar Code Generator Contexts

## Render Barcode Pages

Event triggers screen scraping to be used with the Bar Code Generator module.

# Desktop Contexts

## Create New E-Form

---

**Note:** This context is maintained for legacy purposes only.

---

Event triggers E-Form creation upon screen scrape. This context requires the configuration of an E-Form in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#).

## Index

---

**Note:** This context is maintained for legacy purposes only.

---

Event triggers indexing of documents in the Desktop using the scraped values.

---

**Note:** You must select a Document Type during Application Enabler configuration in order to use this context.

---

This context can be used to scrape values in to the following areas:

- The **Store Document** dialog box.
- The **Re-Index Document** dialog box.

## Retrieve Documents

---

**Note:** This context is maintained for legacy purposes only.

---

Event triggers screen scraping to be used for retrieval.

---

**Note:** The >>**Document Date** Keyword Type is ignored by this context.

---

## Retrieve Folders

---

**Note:** This context is maintained for legacy purposes only.

---

Event triggers retrieval using the Folders interface. This context requires the configuration of a folder in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#). In addition, you must select a Document Type during Application Enabler configuration that is associated with the Keyword Types assigned to the applicable folder.

## Retrieve in Workflow

---

**Note:** This context is maintained for legacy purposes only.

---

Event triggers retrieval from a Workflow life cycle or queue. This context requires the configuration of a Workflow life cycle or queue in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#). Keyword Types configured will be used to retrieve specific documents within a queue.

---

**Note:** The >>**Document Date** Keyword Type is ignored by this context.

---

## Run Custom Query

---

**Note:** This context is maintained for legacy purposes only.

---

Event triggers retrieval using a defined custom query. This context requires the configuration of a custom query in the **General** tab of the **Hotspot Configuration** screen. For more information, see [Configuring Hotspots on page 277](#). In addition, you must select a Document Type during Application Enabler configuration that is associated with the Keyword Types assigned to the applicable custom query.

## Run Script

---

**Note:** This context has been deprecated. New instances of this context cannot be created, but existing instances can be edited and used. Existing VBScripts will function without modification to the VBScript or Application Enabler configuration. If the VBScript accesses OnBase through the OnBase Desktop API, the OnBase Desktop must be installed and registered on the workstation for the VBScript to function properly.

---

Event triggers execution of a VBScript.

Select a VBScript from the **VBScript** drop-down list. For a VBScript to be available from the **VBScript** drop-down list, it must be configured with the **Application Enabler** check box selected in the **Visible Scope** dialog box in the OnBase Configuration module. For more information on this dialog box, see the System Administration documentation.

---

**Note:** In the OnBase Desktop, you can only run one VBScript per Application Enabler context event.

---

## Disconnected Scanning Contexts

### Cancel Index

Event triggers indexing actions to be canceled or skipped in the Disconnected Scanning module.

### Index

Event triggers an indexing action in the Disconnected Scanning module.

## Front Office Scanning Contexts

### Index

Event triggers a data set to be created from the scraped values for use with the Front Office Scanning module.

## Office Integration Contexts

### Index

Event triggers an indexing action in the Office Business Application for 2013, Office Business Application for 2016, Integration for Microsoft Outlook 2013, or Integration for Microsoft Outlook 2016.

---

**Note:** See [Office Business Application Indexing on page 418](#) for information on the areas of the Integration for Microsoft Office 2013, Integration for Microsoft Office 2016, Integration for Microsoft Outlook 2013, and Integration for Microsoft Outlook 2016 where this context can be used.

---

## OnBase Client Contexts

### Cancel Index

Event triggers indexing actions to be canceled or skipped in the OnBase Client.

This context can be used to cancel indexing in the following dialog boxes:

- The **Add/Modify Keywords** dialog box.
- The **Re-Index Document** dialog box, including the re-indexing user interaction window that is displayed when executing the Workflow **Doc - Re-Index Document** action. For more information on this action, including information on configuration options within this action that are specific to using Application Enabler, see the Workflow module reference guide.
- The Document Imaging module's **Document Imaging** window.
- The **Import Document** dialog box, including the indexing user interaction window that is displayed when executing the Workflow **SYS - Import Document** action.
- The user interaction windows that are displayed when executing the Workflow **Form - Display HTML Form for This Document** and **Form - Display HTML Form for Related Document** actions. After using this context, any subsequent Workflow actions or rules that are configured will execute.

### Index

Event triggers an indexing action in the OnBase Client.

This context can be used to scrape values in to the following areas:

- The **Add/Modify Keywords** dialog box.
- The **Re-Index Document** dialog box, including the re-indexing user interaction window that is displayed when executing the Workflow **Doc - Re-Index Document** action. For more information on this action, including information on configuration options within this action that are specific to using Application Enabler, see the Workflow module reference guide.
- The keywords pane in the Document Imaging module's **Document Imaging** window.

- The **Import Document** dialog box, including the indexing user interaction window that is displayed when executing the Workflow **SYS - Import Document** action.
- The user interaction windows that are displayed when executing the Workflow **Form - Display HTML Form for This Document** and **Form - Display HTML Form for Related Document** actions.

## Retrieve Documents

Event triggers a retrieval action in the OnBase Client and EDM Services import dialog box.

### Allowing Document Retrieval to be Minimized

In some instances, you may want to allow document retrieval via Application Enabler using the OnBase Client with the **Document Retrieval** dialog box minimized. To allow the **Document Retrieval** dialog box to be minimized during Application Enabler retrieval:

1. Open the Configuration module.
2. Select **Users | Global Client Settings**.
3. Select the **Misc** tab.
4. Select **Allow AppEnabler retrievals when retrieval window is minimized**.
5. Click **Save**.

## Retrieve Folders

Event triggers retrieval using the Folders interface. This context requires the configuration of a folder in the **General** tab of the **Hotspot Configuration** screen. See [Configuring Hotspots on page 277](#) for more information. In addition, you must select a Document Type during Application Enabler configuration that is associated with the Keyword Types assigned to the applicable folder.

---

**Note:** This context does not support date range settings.

---

## RAC Audit Contexts

### Audit Search

---

**Note:** This context is maintained for legacy purposes only.

---



Event triggers a RAC Audit Claim Search. The RAC Audit interface must be opened and logged into prior to the event trigger.

---

**Note:** The **Claim Status** field is not supported for scraping values using Application Enabler. Whatever is currently displayed in the RAC Audit Client screen will be respected.

---

---

**Note:** The **RAC - Billing Number** and **RAC - Claim Level** Keyword Types are no longer in use. They are retained in Application Enabler Configuration for backwards compatibility.

---

## Patient Search

---

**Note:** This context is maintained for legacy purposes only.

---

Event triggers a RAC Audit Patient Search. The RAC Audit interface must be opened and logged into prior to the event trigger.

---

**Note:** The **RAC - Billing Number** and **RAC - Claim Level** Keyword Types are no longer in use. They are retained in Application Enabler Configuration for backwards compatibility.

---

## Web Client Contexts

### Cancel Index

Event triggers indexing actions to be canceled or skipped in the Web Client.

This context can be used to cancel indexing in the Document Imaging module's **Document Imaging** window.

### Index

Event triggers an indexing action in the Web Client. In order for this context to work properly you must have **sv\_AppEnableIntegration** and **sv\_LaunchAppEnabler** set to true in the Web Server's **web.config** file.

---

**Note:** This context is only functional with the ActiveX Web Client.

---

---

**Note:** You must select a Document Type during Application Enabler configuration in order to use this context.

---

This context can be used to scrape values in to the following areas:

- The **Re-Index Document** dialog box, including the re-indexing user interaction window that is displayed when executing the Workflow **Doc - Re-Index Document** action. For more information on this action, including information on configuration options within this action that are specific to using Application Enabler, see the Workflow module reference guide.

- The keywords pane in the Document Imaging module's **Scanning** window.
- The **Import Document** panel.

## Retrieve Documents

Event triggers a retrieval action using the Web Server to perform DocPop.

---

**Note:** When this context is executed, Application Enabler can only open an Internet Explorer window and will not respect the default browser of the workstation.

---

## Retrieve Folders

---

**Note:** This context has been deprecated. New instances of this context cannot be created, but existing instances can be edited and used.

---

Event triggers retrieval using the Web Client Folders interface. This context requires the configuration of a folder in the **General** tab of the **Hotspot Configuration** screen. See for more information [Configuring Hotspots on page 277](#). In addition, you must select a Document Type during Application Enabler configuration that is associated with the Keyword Types assigned to the applicable folder.) In order for this context to work properly you must have **sv\_AppEnableIntegration** and **sv\_LaunchAppEnabler** set to true in the Web Server's **web.config** file.

## Context Mappings

When you upgrade to OnBase Foundation EP5 from a version prior to OnBase 12, Application Enabler automatically maps old context names to new context names. The following table outlines these changes:

Old Context	New Context
(No Filter)	This context has been deprecated. New instances of this context cannot be created, but existing instances can be edited and used.
Accumulate Keywords	<p>This context has been deprecated. New instances of this context cannot be created, but existing instances can be edited and used.</p> <p>When using this context, the ability to clear accumulated Keyword Values from memory by right-clicking and selecting <b>Clear Accumulated Events</b> is not available.</p> <hr/> <p><b>Tip:</b> Use memorized keywords instead of this context. For more information on memorized keywords, see <a href="#">Configuring Memorization on page 284</a>.</p> <hr/>
AE - AnalysisPop	This context has been deprecated. New instances of this context cannot be created, and this context can no longer be used.
AE - ChartPop	<p>As of OnBase 15, this context has been deprecated. New instances of this context cannot be created, and this context can no longer be used.</p> <p>Use Application Enabler - Patient Window instead of this context.</p> <hr/> <p><b>Note:</b> If you are upgrading to OnBase 15 and your solution requires the use of this context, please contact your first line of support.</p> <hr/>
AE - DeficiencyPop	Application Enabler - Retrieve Deficiencies
AE - FolderPop	Application Enabler - FolderPop

Old Context	New Context
<b>AE - LongitudinalPop</b>	<p>As of OnBase 15, this context has been deprecated. New instances of this context cannot be created, and this context can no longer be used.</p> <p>Use Application Enabler - Patient Window instead of this context.</p> <hr/> <p><b>Note:</b> If you are upgrading to OnBase 15 and your solution requires the use of this context, please contact your first line of support.</p> <hr/>
<b>AE - MRNPop</b>	<p>As of OnBase 15, this context has been deprecated. New instances of this context cannot be created, and this context can no longer be used.</p> <p>Use Application Enabler - Patient Window instead of this context.</p> <hr/> <p><b>Note:</b> If you are upgrading to OnBase 15 and your solution requires the use of this context, please contact your first line of support.</p> <hr/>
<b>AE - Retrieval</b>	<p>This context has been deprecated. New instances of this context cannot be created, but existing instances can be edited and used.</p> <hr/> <p><b>Tip:</b> Use Application Enabler - Retrieve Documents instead of this context.</p> <hr/>
<b>Barcode Rendering</b>	Bar Code Generator - Render Barcode Pages
<b>Desktop - Custom Query</b>	<p>Desktop - Run Custom Query</p> <hr/> <p><b>Tip:</b> Use Application Enabler - Run Custom Query instead of this context.</p> <hr/>
<b>Desktop - E-Form Creation</b>	<p>Desktop - Create New E-Form</p> <hr/> <p><b>Tip:</b> Use Application Enabler - Create New E-Form instead of this context.</p> <hr/>
<b>Desktop - Folder Retrieval</b>	<p>Desktop - Retrieve Folders</p> <hr/> <p><b>Tip:</b> Use Application Enabler - Retrieve Folders instead of this context.</p> <hr/>
<b>Desktop - Index</b>	Desktop - Index

Old Context	New Context
<b>Desktop - Retrieval</b>	Desktop - Retrieve Documents <b>Tip:</b> Use Application Enabler - Retrieve Documents instead of this context.
<b>Desktop - VBScript</b>	Desktop - VBScript <b>Tip:</b> Use Application Enabler - Run Script instead of this context.
<b>Desktop - Workflow Retrieval</b>	Desktop - Retrieve in Workflow <b>Tip:</b> Use Application Enabler - Retrieve in Workflow instead of this context.
<b>Disconnected Scan - Cancel</b>	Disconnected Scanning - Cancel Index
<b>Disconnected Scan - Index</b>	Disconnected Scanning - Index
<b>Front Office Scanning</b>	Front Office Scanning - Index
<b>Office Integration - Index</b>	Office Integration - Index
<b>OnBase Client - Cancel</b>	OnBase Client - Cancel Index
<b>OnBase Client - Folder Retrieval</b>	OnBase Client - Retrieve Folders <b>Tip:</b> Use Application Enabler - Retrieve Folders instead of this context.
<b>OnBase Client - Index</b>	OnBase Client - Index
<b>OnBase Client - Retrieve</b>	OnBase Client - Retrieve Documents <b>Tip:</b> Use Application Enabler - Retrieve Folders instead of this context.
<b>RAC Audit - Claim Search</b>	This context has been deprecated. New instances of this context cannot be created, but existing instances can be edited and used. <b>Tip:</b> Use RAC Audit - Audit Search instead of this context.
<b>RAC Audit - Patient Search</b>	RAC Audit - Patient Search
<b>Unity Client - Custom Query</b>	Application Enabler - Run Custom Query

Old Context	New Context
Unity Client - Document Composition	Application Enabler - Compose Document
Unity Client - E-Form Creation	Application Enabler - Create New E-Form
Unity Client - Folder Retrieval	Application Enabler - Retrieve Folders
Unity Client - Index	Application Enabler - Index
Unity Client - Retrieval	Application Enabler - Retrieve Documents
Unity Client - Upload	Application Enabler - Upload Document
Unity Client - Unity Form Creation	Application Enabler - Create New Unity Form
Unity Client - Workflow Retrieval	Application Enabler - Retrieve in Workflow
Unity Client - WorkView Object Creation	Application Enabler - Create WorkView Object
Unity Client - WorkView Retrieval	Application Enabler - Retrieve WorkView Objects
Web Client - Cancel	Web Client - Cancel Index
Web Client - Folder Retrieval	Web Client - Retrieve Folders
Web Client - Index	Web Client - Index
Web Server - Retrieve	Web Client - Retrieve Documents <hr/> <b>Tip:</b> Use Application Enabler - Retrieve Documents instead of this context.

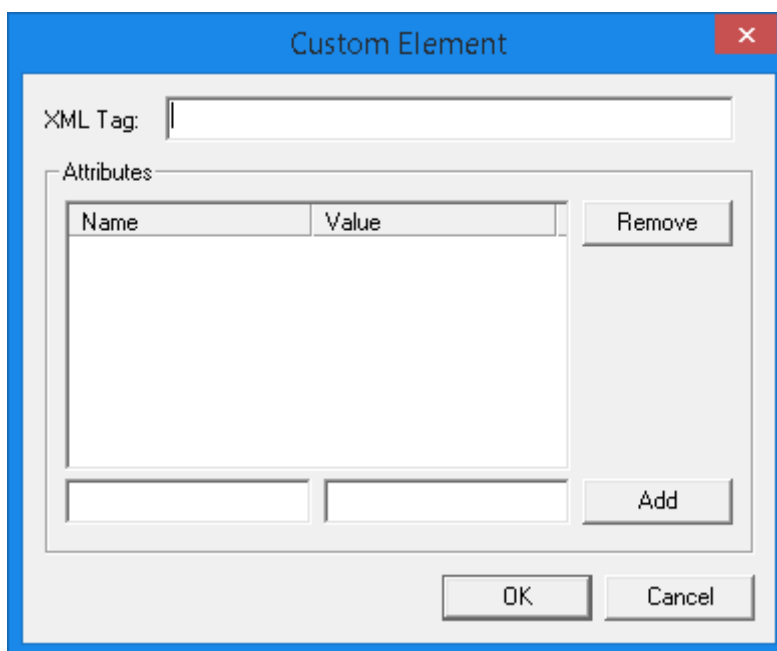
**Note:** Contexts that have been deprecated are listed as **\*\*\*Deprecated\*\*\*** in the **Client** column in the **Properties** dialog box in Application Enabler Configuration.

## Creating a Custom Element for Sorting Documents upon Scrape

In order to successfully be able to sort documents upon Application Enabler's scraping their Keyword Values, you must create a custom element. This custom element will apply an XML stylesheet, which will then sort the documents.

**Note:** In order to create this custom element, you must have an XML stylesheet configured for your Document Types.

1. Select the appropriate hotspot and click **Settings**.
2. Select the **Other Elements** tab.
3. Click **New**. The **Custom Element** dialog box is displayed.



4. In the **XML Tag** field, enter **STYLESHEET**.
5. In the **Name** attribute field, enter **URL**.
6. In the **Value** attribute field, enter the location of the stylesheet.

**Tip:** The location of the stylesheet, which should be named **Default.xsl**, can be local or have a UNC path.

7. Click **Add**.
8. Click **OK** when finished.

## Creating a Custom Element for Document Packet Generation

Application Enabler can be configured to allow the creation of a Virtual E-Form as the primary document when using the Generate Document Packet context. In this configuration, you must create a custom element that will allow OnBase to create the Virtual E-Form.

**Note:** The Virtual E-Form must be configured as the primary document for the Document Packet you wish to create. See the **E-Forms** module reference guide for more information on creating Virtual E-Forms and the **Document Packaging** module reference guide for more information on configuring Document Packets.

To create a custom element:

1. Select the appropriate hotspot and click **Settings**.
2. Select the **Other Elements** tab.
3. Click **New**. The **Custom Element** dialog box is displayed.

The screenshot shows the 'Custom Element' dialog box. It has a title bar with the text 'Custom Element' and a red close button. Inside the dialog, there is an 'XML Tag' field. Below it is an 'Attributes' section containing a table with two columns: 'Name' and 'Value'. To the right of the table is a 'Remove' button. Below the table are two empty input fields and an 'Add' button. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Name	Value
------	-------

4. In the **XML Tag** field, enter **DOCPACKETATTRIBUTES**.
5. In the **Name** attribute field, enter **createDocPacketDocIfMissingDocHandle**.
6. In the **Value** attribute field, enter **true**.
7. Click **Add**.
8. Click **OK** when finished.



# Configuring HTTPAutomation and HTTPSAutomation

Application Enabler can be configured to perform scrape events outside of configured screens.

**Note:** Only Application Enabler contexts can be used when posting scrape events to Application Enabler. Other contexts (e.g., Desktop, Disconnected Scanning, Web Client) cannot be used.

## Configuring HTTPAutomation

To allow scrape XML to post to Application Enabler, complete the following steps:

1. Ensure that service mode is enabled in the Unity Client **.config** file.
2. Ensure that Application Enabler is enabled in the Unity Client **.config** file.
3. In the Unity Client **.config** file, locate the **Hyland.Canvas.Automation.Services** element. Ensure that **HttpAutomation** is enabled.

By default, **port 15412** is used for sending the HTTP POST request. If necessary, you can change the port value to a different open port on the local machine where Application Enabler is installed.

## Configuring HTTPSAutomation

**Note:** Enabling HTTPSAutomation allows the use of the HTTPS protocol when automating Application Enabler. It does not change the security of your enabled application.

The following requirements need to be configured prior to enabling HTTPSAutomation:

- A domain which will resolve to **localhost**.
- An HTTPS binding public/private key pair for the domain, in .PFX format, that must be trusted by all client workstations.
- The password for the private key must be "OnBase".
- The key pair must be stored somewhere accessible to all clients using HTTPSAutomation (e.g. distributed to every workstation, or stored in a network share accessible via UNC).

If your solution does not require a unique domain, **localhost.onbase.com** can be used.

A certificate for the **localhost.onbase.com** domain can be obtained by contacting your first line of support.

To allow scrape XML to post to Application Enabler using an HTTPS binding, complete the following steps:

1. Ensure that service mode is enabled in the Unity Client **.config** file.
2. Ensure that Application Enabler is enabled in the Unity Client **.config** file.

3. In the Unity Client **.config** file, locate the **Hyland.Canvas.Automation.Services** element. Ensure that **HttpsAutomation** is enabled.

By default, **port 15425** is used for sending the HTTPS POST request. If necessary, you can change the port value to a different open port on the local machine where Application Enabler is installed.

4. In the **HttpsAutomation** element, for the **certificateLocation** value, enter the location of the certificate.

If the certificate is stored in a network share, the value of **certificateLocation** would be the UNC path the certificate. If the certificate is distributed to every workstation, the value of **certificateLocation** can be an absolute or relative path to the certificate.

For example, if the certificate is stored in the same location where Application Enabler is installed, the value of **certificateLocation** can be the file name of the certificate.

## Posting Scrape Events to Application Enabler

---

**Note:** Only Application Enabler contexts can be used when posting scrape events to Application Enabler. Other contexts (e.g., Desktop, Disconnected Scanning, Web Client) cannot be used.

---

Some line-of-business applications may allow you to configure an area of the screen (for example, an HTML button) to post data to Application Enabler. This allows you to send the scrape event XML data as an HTTP POST request, which will pass scrape event XML data directly into Application Enabler. There is virtually no character length limit when creating an HTTP POST request to pass scrape data into Application Enabler.

To post a scrape event:

1. Configure the line-of-business application to generate an HTTP POST request to the address configured for HTTPAutomation or HTTPSAutomation.

---

**Note:** The URL must point to the local machine. If you modified the port value in the steps above, ensure that the proper port value is used in the URL.

---

Ensure that the POST request contains all of the scrape event XML. To obtain the scrape event XML data, enable demo mode and trigger the necessary context event to display the **Scrape Event** window. Then, view the page source or click the **Show/Hide AE URI areas** button to obtain the scrape event XML data.

The following example shows the basic format for an HTTP POST request that will pass scrape data into Application Enabler from a submit button:

```
<script>
  function go() {
    var request = new XMLHttpRequest();
    var xml = '<SCRAPE> <ADDITIONALINFO GeneratedForLiveMode="0"
GeneratedForDiscoveryMode="0" /> <CONTEXT name="Unity Client - Retrieval"
localename="Application Enabler - Retrieve Documents" /> <DOCTYPE id="102" name="AP -
Purchase Order" /> <DOCTYPE id="127" name="AP - Checks" /> <HOTSPOT name="&lt;&lt; Screen
&gt;&gt;" AllowLiveDocumentRetrieval="1" AllowLiveException="1" MemorizeOnly="0"
AlsoFireEvents="0" RequireMemorizedData="0" WarningLevel="0" AutoClearMemorizedData="0" />
<KEYWORD id="103" name="PO #" value="989" indexonly="0" dataType="10" /> <SCREEN
name="Accounts Payable" id="{71E74C39-EDD1-41B6-86A0-3F9E52070322}" /> </SCRAPE>';
    var url = 'http://localhost:15412/AE/xml';
    request.open("POST", url, false);
    request.send(xml);
  }
</script>
</head>
<body>
  <button id="button" onclick="go();">Send Request</button>
</body>
```

---

**Note:** Special characters within the scrape event XML data fields (e.g., & < > " and ') must be encoded. For example, in the image above, the **HOTSPOT name** value of <<Screen>> has been encoded as &lt;&lt; Screen &gt;&gt;.

---



---

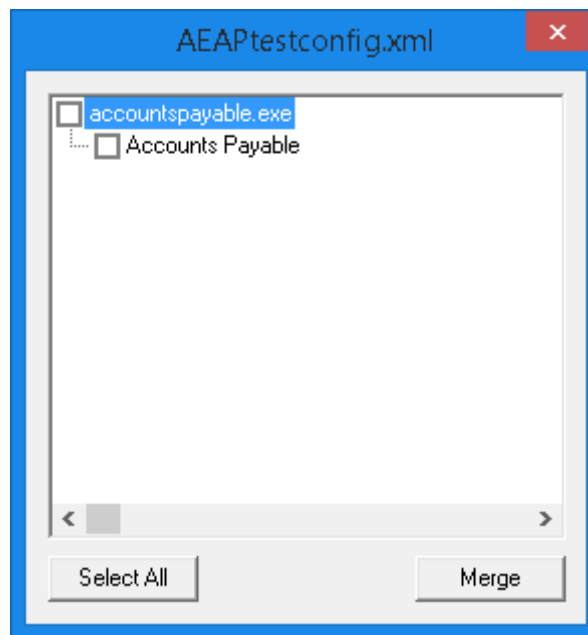
**Note:** Application Enabler must be running in order for the HTTP POST request to be successful.

---

## Merging Configuration Files

Existing Application Enabler configuration files can be merged into one file. To merge configuration files:

1. Open one of the configuration files that will be merged in Application Enabler Configuration or create a new configuration.
2. Select **Tools | Merge File...**
3. Open the other configuration file that is to be merged with the currently opened configuration file.
4. Click **Open**. The file's applications and screens are listed in the dialog box. The name of the dialog box is the name of the configuration file.



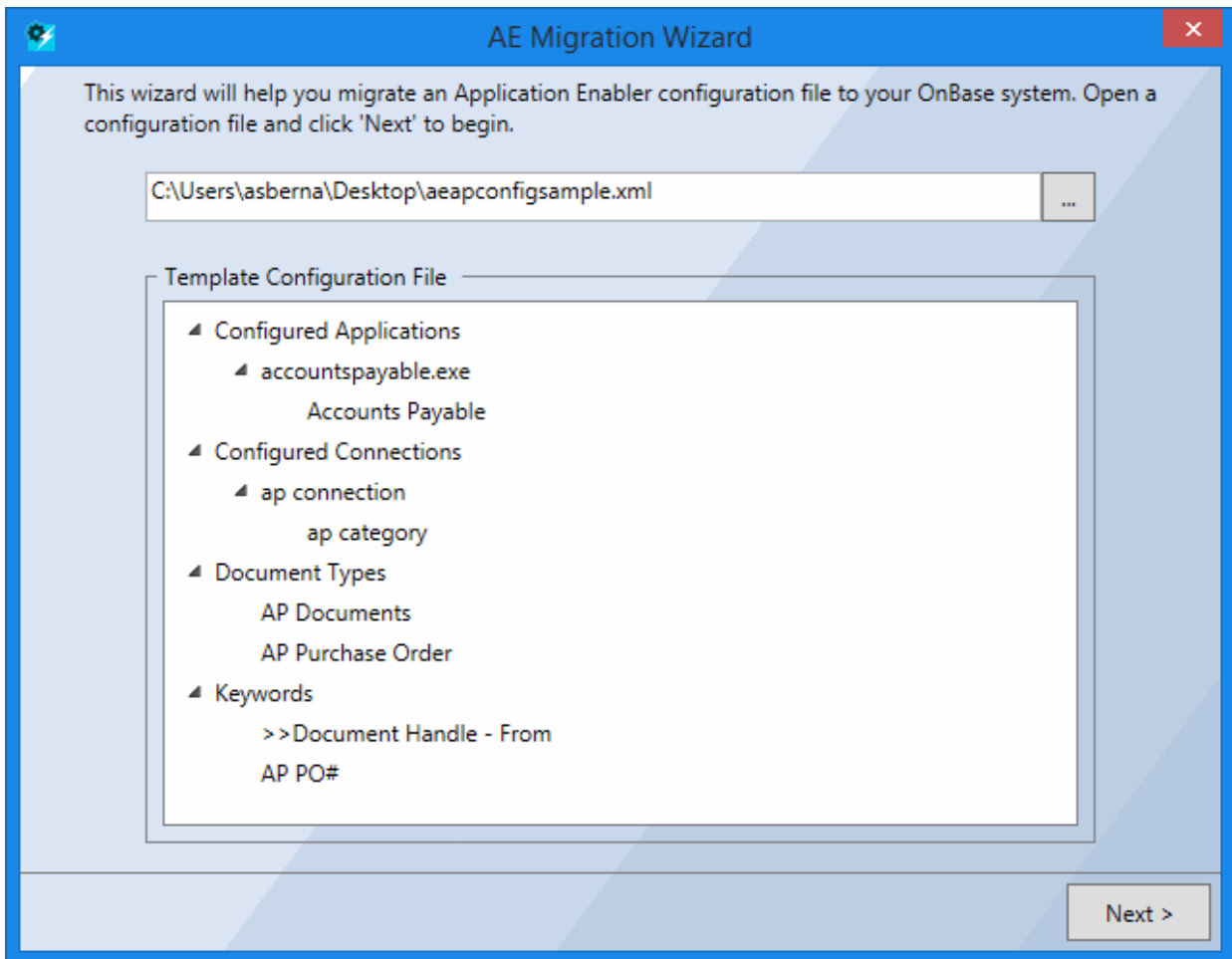
5. Select the appropriate application(s) and screen(s). If you want to include all applications and screens into the merged file, click **Select All**.
6. Click **Merge**.
7. If a screen exists in both configuration files, a message stating **The screen <name of screen> matches a previously configured screen. Do you want to overwrite it?** To keep the screen configuration for the configuration file opened in step 4 (also the file name displayed in the dialog box title), click **Yes**. To keep the configuration of the screen of the currently opened configuration file in Application Enabler Configuration, click **No**.
8. Save the configuration file.

# Migrating Configuration Files

Existing Application Enabler configuration files can be migrated from one database to another by using the AE Migration Wizard. To migrate a configuration file:

1. In AEConfig, select **Tools | Migrate File...**
2. Browse to the configuration file that will be migrated.
3. Click **Open**.

4. The file's Configured Applications, Connections, and Contexts are displayed in the dialog box under Template Configuration File.



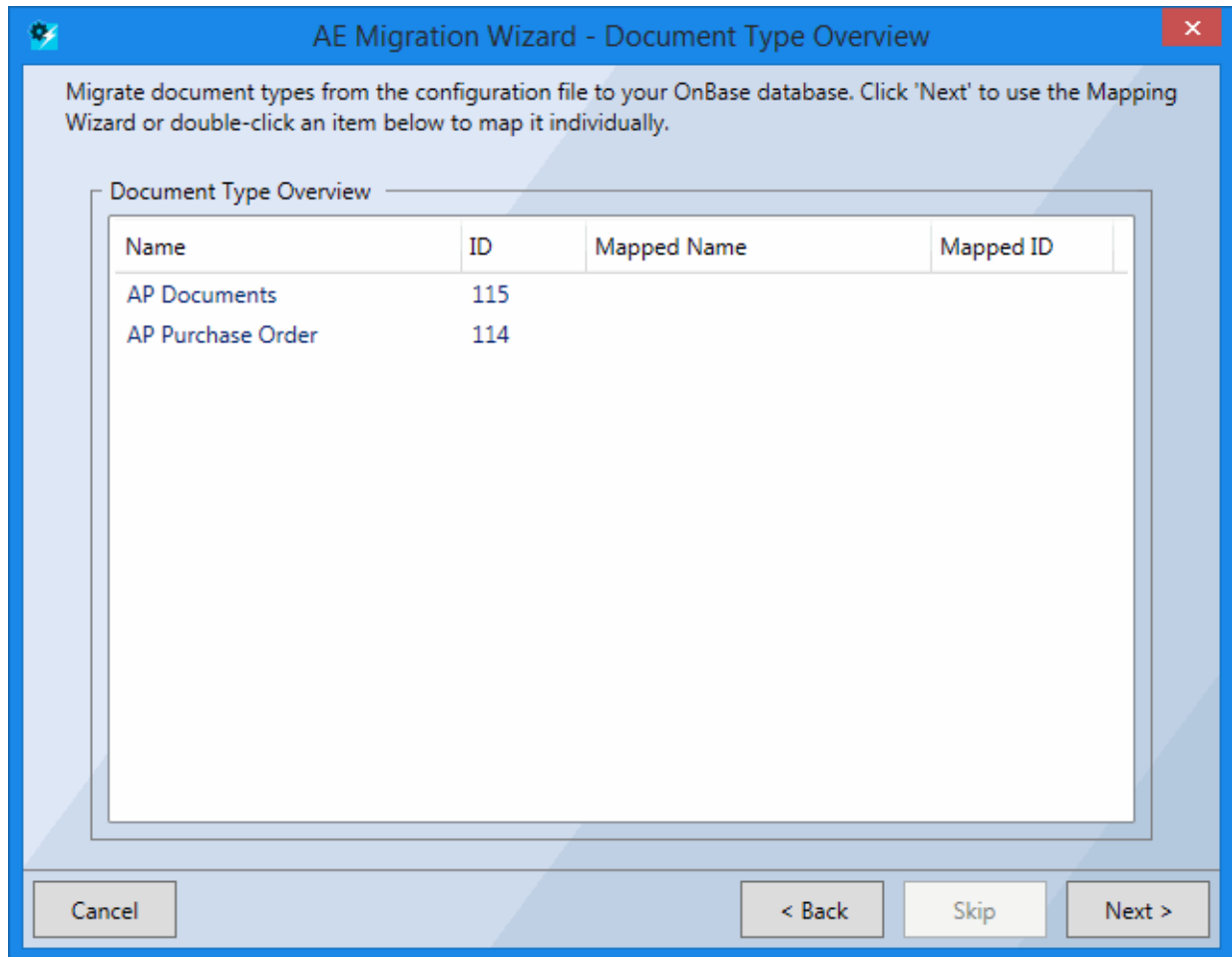
Click **Next**.

---

**Note:** If you are not logged on to OnBase, you are prompted for your login credentials.

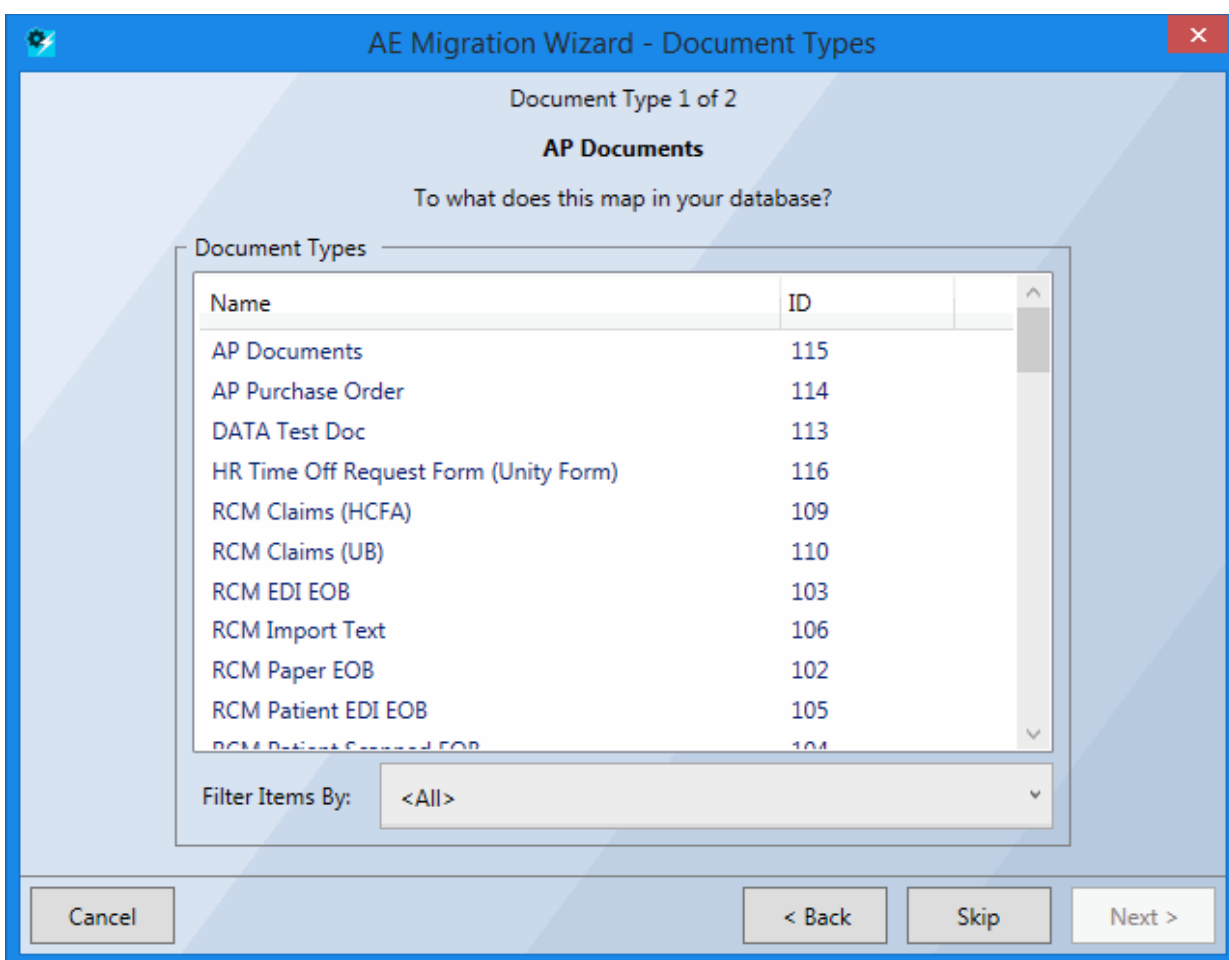
---

The **Context Type Overview** dialog is displayed:



The **Context Type Overview** dialog displays the name of the current context to be mapped in the window's title bar, and the line items to be mapped are displayed in the Context Type Overview box by their Name, ID, Mapped Name, and Mapped ID.

- To map an item in the Context Type Overview list, either double-click an item or select an item and click **Next**. The Item Mapping screen is displayed:



The name of the current item being mapped is displayed in boldface. To filter the list items, click the **Filter Items By** drop-down select box and select a filter.

- To map the currently displayed item, select its corresponding item from the list and click **OK**. Alternatively, you can double-click the item to map it to the currently displayed item.

To skip mapping an item, click **Skip**.

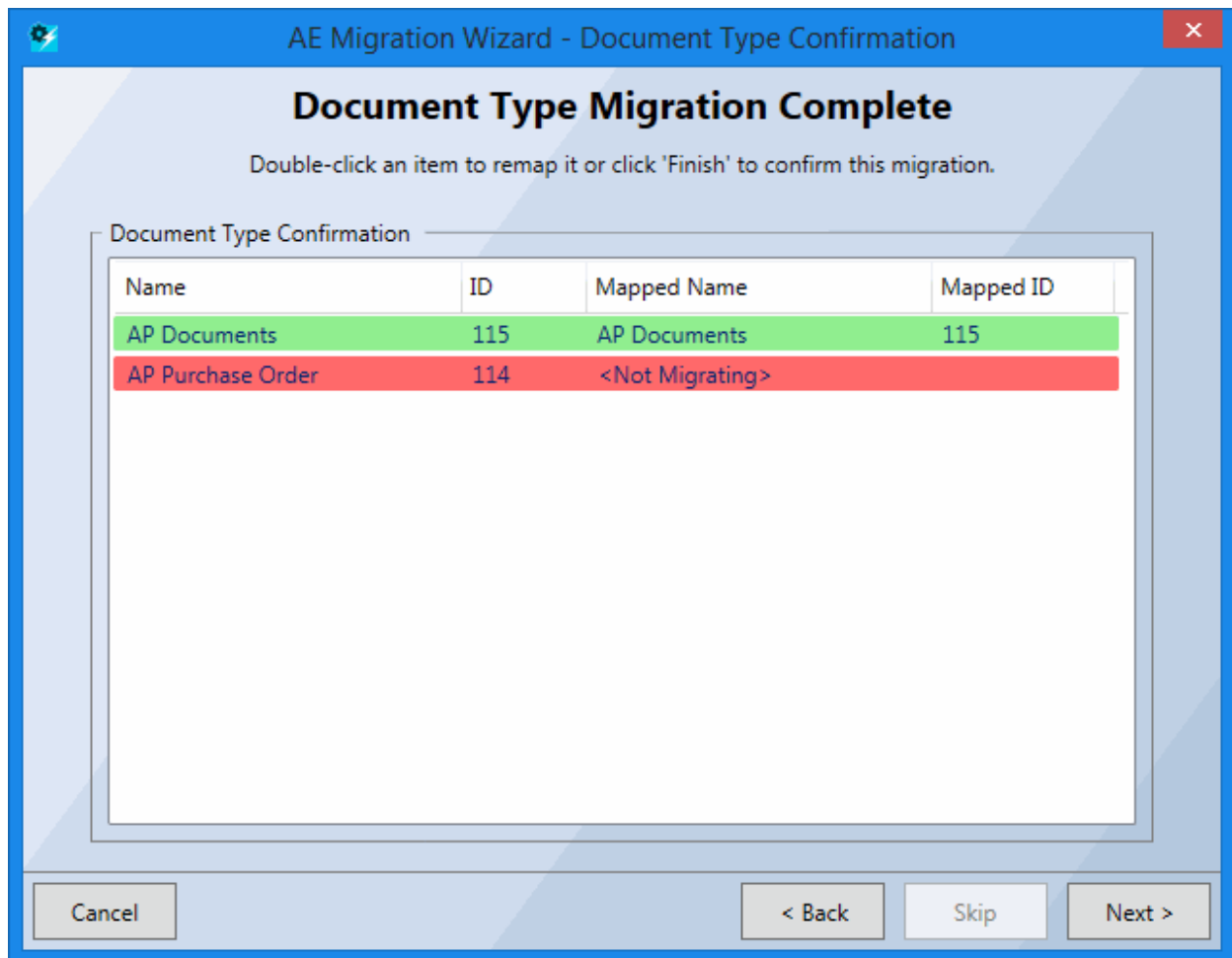
---

**Note:** Skipped items will not be migrated.

---

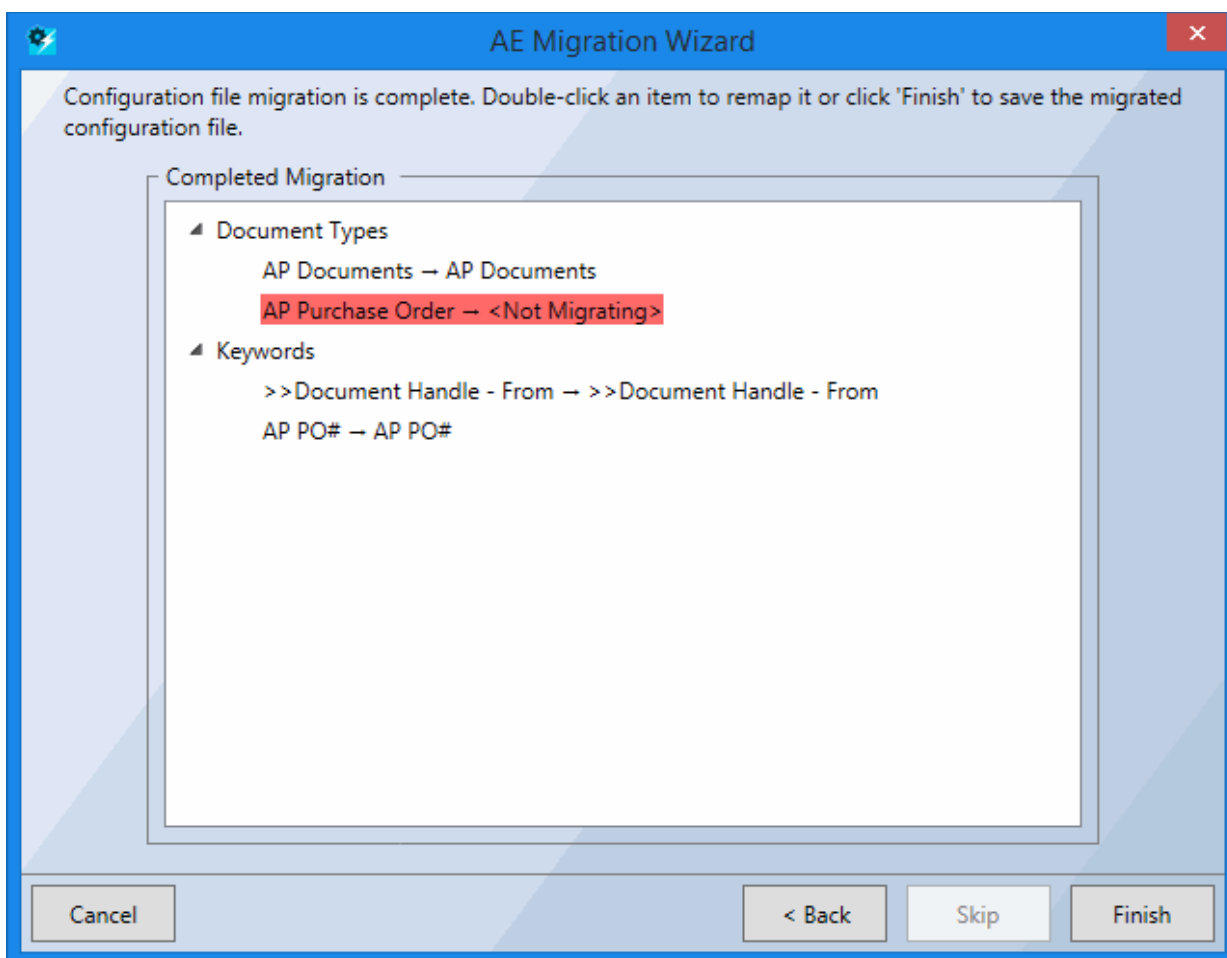


- After all of the context's items have been either mapped or skipped, the **Migration Complete** screen for the current context is displayed:



- Items that have been mapped are highlighted in green.
  - Items that have been skipped are highlighted in red.
- To continue mapping additional contexts, click **Next**.
  - Repeat steps 4-8 to map additional contexts.

10. After all contexts have been mapped, the Migration Wizard's Completed Migration confirmation screen is displayed:



Items can be remapped by clicking the **Back** button or by double-clicking a mapped item in the list.

11. Click **Finish** to save the newly created configuration file.

## Application Enabler and Scanning

When using Application Enabler to index document in scan queues, several Application Enabler options can be set for a scan queue during configuration. See the Document Imaging documentation for further information.

## Application Enabler Live Configuration

Before you can use Application Enabler Live, you must configure at least one hotspot in your line-of-business application. For Document Type names to be displayed in the **Live Count** window, Document Types must be configured for the hotspot.

Exceptions can also be turned on or off at the hotspot level. When exceptions are turned off, the red exclamation point is not displayed in the **Live Count** window. For more information about turning exceptions on or off, see [Select Folder Type, Keyword Values Used, Document Types, Keyword Types, Date Parameters, and Other Elements](#) on page 278.

If you are configuring an application and experience exceptions that are disruptive, you can enable **Silent Mode**. The **Silent Mode** option is selected in Application Enabler Configuration. This option is located on the **Options** dialog box's **Advanced** tab.

Application Enabler Live can be used with text-based applications only when using Application Enabler's OCR functionality.

## Demo Mode

Demo Mode can be used to do the following:

- Test whether an application can be integrated with OnBase in the absence of an OnBase system.
- Debug an existing configuration.
- Be used as a diagnostic utility for other offices and customer sites.

Demo Mode is useful for configuring screens when there is no OnBase client to connect to. In Demo Mode, Application Enabler does not do the following:

- Retrieve or index documents. Instead, it displays a dialog box showing the Document Type, Keyword Type, and Keyword Value information configured for and scraped from the screen.
- Include an index icon.
- Provide the ability to configure hotspots.

To use Demo Mode in Application Enabler Configuration:

1. Add the **-DEMO** command line switch to the shortcut, or activate Demo Mode within the Application Enabler Configuration interface.
2. Configure the line-of-business application as normal.
3. After selecting the screen to enable, the **Document Types** dialog box is displayed as normal. However, since there is no OnBase database to connect to, there are no Document Types to select. If the **-DEMO** command line switch is applied, there are some hard coded simulated Document Types to choose from. If not, the only Document Types available to choose from are those already configured within the Application Enabler. Choose as many as needed, though at least one must be selected.
4. The **Keyword Types Configuration** dialog box also includes a list of simulated Keyword Types. The same Keyword Type can be used to map all or just one field in the line-of-business application.
5. Continue the configuration as normal.

## Using Demo Mode for Debugging Configuration

If an Application Enabler Configuration is not returning the correct documents from OnBase, run Application Enabler in Demo Mode.

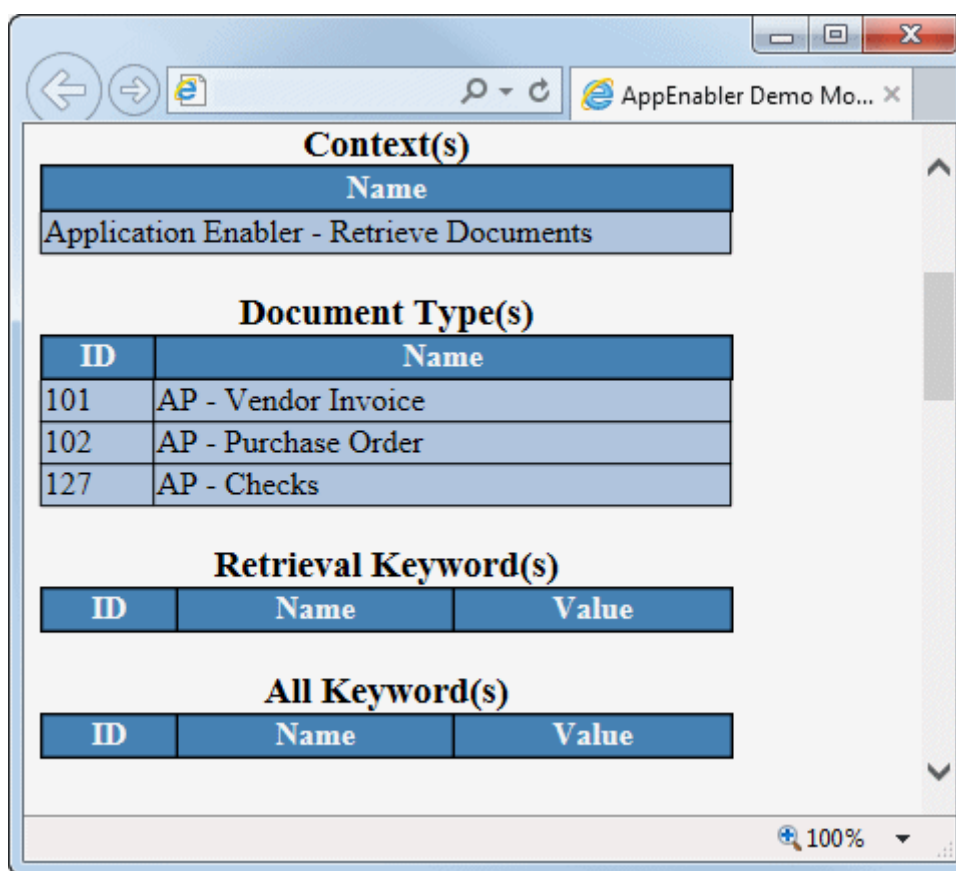
The **Scrape Event** dialog box will display and show what was scraped from the screen. If there is no value next to the keyword, then Application Enabler could not scrape the value from the line-of-business application screen. The result of this would be to have Application Enabler return a hit list of all the documents for the Document Type configured for the screen. In this example, the screen was properly recognized. If the screen was not configured properly this dialog would not appear because Application Enabler did not recognize the current screen as being enabled.

The following is an example of an unsuccessful test; notice that Application Enabler could not find any Keyword Values on the line-of-business application screen.

---

**Note:** Make sure there are values in the keyword fields that were mapped to.

---



A screen such as this means that the screen needs to be reconfigured using different keyword mappings.

If the application still does not work, contact your first line of support.

# System Interaction

## Data Capture Server

Application Enabler can leverage the advanced OCR capabilities, including OCR of ClearType fonts, provided by the OnBase Data Capture Server. For information on installing the Data Capture Server, as well as details regarding requirements and configuration, refer to the **Data Capture Server Deployment Guide**.

The following is required in order for Application Enabler to use the Data Capture Server for OCR processing:

- The 64-bit version of the Hyland OCR Engine must be installed on the same machine as the Data Capture Server.  
Refer to the Data Capture Server Deployment Guide for installation requirements and information.
- The Data Capture Server must be installed.  
Refer to the Data Capture Server Deployment Guide for installation requirements and information.
- The OnBase database must have the appropriate licenses.  
See [Licensing on page 2](#).
- The Hyland Data Capture Server Windows service must be running.

## Document Imaging

Application Enabler can be used to obtain indexing values from a line-of-business application when scanning and indexing documents. Application Enabler-specific options are available at the scan queue level. For more information, see the Document Imaging documentation.

## Integration for Epic

Although Application Enabler is capable of integrating with Epic systems, Epic upgrades may introduce changes that invalidate Application Enabler's configuration. To integrate Epic and OnBase, use the OnBase integrations for Epic. These integrations have been developed specifically for use with Epic systems, and upgrade practices are well documented. Refer to the Integration for Epic module reference guide for additional information.

## Workflow

Application Enabler can be used to scrape indexing values for the Doc - Re-Index Document Workflow action. Application Enabler-specific options for this action are also available. For more information, see the Workflow documentation.

# APPLICATION ENABLER BEST PRACTICES

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

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

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

## Configuration

It is considered a best practice to backup your Application Enabler configuration file before making changes.

When configuring a line-of-business application, configure all Keyword Types that could potentially be used. Then, configure hotspots to use the Keyword Types that you currently need.

If your solution doesn't require hotspot-specific contexts, then all context actions should be configured during the initial application-enabling configuration. You should only configure contexts at specific hotspots, including the <<Screen>> hotspot, if you need context actions to be available only at those hotspots.

## Enabling Applications

### Windows Applications

Windows-based line-of-business applications should be configured using the Windows configuration process. If that proves unsuccessful, you should then attempt to configure the application using the Smart-Screen configuration process. If that is also unsuccessful, attempt the text-based configuration process before using Application Enabler's OCR functionality.

### OCR

It is considered a best practice to only use Application Enabler's OCR functionality if you cannot enable the line-of-business application using one of the standard screen types or standard text-based screen scraping using the Windows clipboard.

## Step by Step Configuration

### Properties Dialog Box

#### Mouse and Keyboard Events and Contexts

The following are considered best practices for configuring mouse and keyboard events and contexts:

- Use a keyboard key in addition to the **Left Click** and **Right Click** options when configuring a mouse event. Additionally, do not use similar mouse and keyboard events in the same application. For example, Shift+Left Click and Shift+Left Double Click.
- Do not use a keyboard key or mouse action that triggers an action in the line-of-business application.

## Testing a Configuration

Before deploying an Application Enabler configuration in a production environment, it is considered a best practice to thoroughly test the configuration in a test environment. Testing best practices include:

- Running Application Enabler in Demo Mode.
- Using different users to test the configuration.
- Restarting the entire line-of-business application.
- Navigating away from the enabled screen and then back to the screen to ensure that functionality is not lost.

## Installation

### Enabling Java Applications

It is considered a best practice to use Java Access Bridge 2.0.2 or higher, as long as it is compatible with the version of the Java Runtime Engine that your application requires.

## Overview

You can create custom links that users can access from your line-of-business application that—when clicked—execute Application Enabler contexts. These links, referred to as AEPop links, can be added to a custom Web page, configured to a button in your line-of-business application, and even sent to users via email.

AEPop links can either be created manually, or by using the AE URI demo interface to gather and format XML data, which is then automatically encoded, formatted, and translated into a URI link.

## Requirements

In order for users to open AEPop links, the Unity Client must be running in service mode, and Application Enabler must be enabled on the user's workstation. The Unity Client process does not need to be running; clicking an AEPop link will automatically start the process if it is not running.

AEPop links do not rely on the same configuration settings as Unity Pop links. Aside from the items mentioned in the previous paragraph, no additional configuration of the Unity Client configuration file is necessary.

Before you create AEPop links, you should be aware of several limitations, which are explained in the following sections:

- [AEPop Character Limitations on page 329](#)
- [AEPop Date Keyword Formatting on page 329](#)
- [Context Limitations on page 330](#)

## AEPop Character Limitations

When using Mozilla Firefox and Google Chrome to open AEPop links, these links have approximately a 2000 character limit. When using Microsoft Internet Explorer, these links have approximately a 500 character limit.

The character limit can be circumvented by embedding the AEPop link in an iframe on a Web page.

## AEPop Date Keyword Formatting

All keyword values that contain dates must have the date entered in the following format in order to be passed on the AE Pop URI string: **MM-dd-yyyy**



## Context Limitations

Only Application Enabler contexts can be used when creating AEPop links. Other contexts (e.g., Desktop, Disconnected Scanning, Web Client) cannot be used.

## Creating AEPop Links

AEPop links can either be created manually, or by using the AE URI demo interface. The demo interface allows you to easily create and modify the information that is necessary for creating AEPop links.

The demo interface is not a direct substitution for manually creating AEPop links; care should be taken whether you are creating links manually or using the demo interface. For information about creating AEPop links, see the following sections:

- [Creating AEPop Links Manually on page 330](#)
- [Creating AEPop Links Using The Demo Interface on page 334](#)

## Creating AEPop Links Manually

Manually creating AEPop links requires the completion of the following steps.

1. Gather the scrape data XML for the Application Enabler contexts that the link should execute.  
[See Gathering the Scrape Data XML on page 330.](#)
2. Format the scrape data XML.  
[See Manually Formatting the Scrape Data XML on page 331.](#)
3. Encode the scrape data XML into Base64.  
[See Encoding the Scrape Data XML on page 332.](#)
4. Format the Base64-encoded data.  
[See Formatting the Encoded Base64 Data on page 333.](#)
5. Create the AEPop link.  
[See Manually Creating the AEPop Link on page 334.](#)
6. Test the AEPop link.  
[See Testing The AEPop Link on page 334.](#)

## Gathering the Scrape Data XML

To manually create an AEPop link, you must first gather the scrape data XML for the context(s) you want users to execute. This can be easily accomplished by using demo mode to gather scrape data which is then presented in a scrape event window in your Web browser. Then, you can obtain the data for the scrape event(s) by viewing the page source.

After enabling demo mode, perform the following steps to gather the scrape data XML:

1. Using demo mode, trigger an Application Enabler context event to display the Scrape Event window.
2. View the source code of the content in the scrape event window. The method for viewing the source of the page varies depending on your Web browser.

The following text is an example of scrape data XML obtained from the scrape event window's page source:

```
<SCRAPE>
<ADDITIONALINFO GeneratedForLiveMode="0" GeneratedForDiscoveryMode="0" />
<CONTEXT name="Unity Client - Retrieval" localname="Application Enabler - Retrieve Documents" />
<DOCTYPE id="101" name="AP - Vendor Invoice" />
<DOCTYPE id="102" name="AP - Purchase Order" />
<DOCTYPE id="127" name="AP - Checks" />
<HOTSPOT name="&lt;&lt; Screen &gt;&gt;" AllowLiveDocumentRetrieval="1"
AllowLiveException="1" MemorizeOnly="0" AlsoFireEvents="0"
RequireMemorizedData="0" WarningLevel="0" AutoClearMemorizedData="0" />
<KEYWORD id="103" name="Customer Name" value="O&apos;Doyle Economical Imports"
indexonly="0" dataType="10" />
<KEYWORD id="114" name="Invoice #" value="1220" indexonly="0" dataType="10" />
<SCREEN name="Accounts Payable" id="{3CB6FBFE-71BD-4C1B-B4C1-A3D17B51271F}" />
</SCRAPE>
```

## Manually Formatting the Scrape Data XML

After you have gathered the scrape data XML, all of the special characters listed below that are present in any of the scrape data value fields must be encoded.

**Note:** This only applies to the field *values*, and not all characters within the XML source.

Special Character	Encoded Character
&	&amp;
<	&lt;
>	&gt;
"	&quot;
'	&apos;

Additionally, you can format the XML data by removing elements which are not required as part of the link. This helps to reduce the overall character count of the link.

The **CONTEXT name** field is required. The following elements and/or field values can safely be removed from the scrape data XML for the purpose of reducing the character count of the AEPop link:

- The **CONTEXT localename** field value
- The **ADDITIONALINFO** element
- The **HOTSPOT** element
- The **SCREEN** element
- The **DOCTYPE name** field value
- The **KEYWORD name** field value
- Any **KEYWORD value** field values (if necessary)

---

**Note:** Although you can safely remove the **DOCTYPE name**, **KEYWORD name**, and **KEYWORD value** field values, the **DOCTYPE id** and **KEYWORD id** field values are still required.

---

**Note:** Context names are case-sensitive. Ensure that the character case of the context in the XML matches the character case of the context as it is displayed in Application Enabler. Incorrectly formatted contexts will not be recognized.

---

**Caution:** Do not remove entire **value** fields from XML elements if there are missing or empty values (e.g., **KEYWORD value=""**). Removing entire **value** fields that have empty values will cause silent errors to occur when attempting to access the AEPop link.

---

## Encoding the Scrape Data XML

Once you have compiled and formatted all of the scrape data to be used for the AEPop link, it must be encoded into Base64. After taking the XML data example from the previous sections, the example below has been formatted to encode any special characters as well as remove the **ADDITIONALINFO**, **HOTSPOT**, and **SCREEN** XML elements. The **CONTEXT localename**, **DOCTYPE name**, and **KEYWORD name** values were also removed.

```
<SCRAPE>
<CONTEXT name="Unity Client - Retrieval" localename="" />
<DOCTYPE id="101" name="" />
<DOCTYPE id="102" name="" />
<DOCTYPE id="127" name="" />
<KEYWORD id="103" name="" value="0&apos;Doyle Economical Imports" indexonly="0"
dataType="10" />
<KEYWORD id="114" name="" value="1220" indexonly="0" dataType="10" />
</SCRAPE>
```

## Formatting the Encoded Base64 Data

After encoding the XML data into Base64, the Base64-encoded data must be formatted to replace the following characters, if they exist in the Base64-encoded data:

Existing Character	Replacement Character
+	- (hyphen)
/	_ (underscore)
=	,

Replace any characters from the **Existing Character** column that occur in the Base64-encoded data with the corresponding characters in the **Replacement Character** column. The example below shows Base64 data before and after the characters have been replaced.

**Before:**

```
PFNDUKFQRT4NCjxBRERJVElPTkFMSU5GTyBHZW5lcmF0ZWRGb3JMaxZlTW9kZT0iMCIgR2VuZXJhdGvKRM9yRG1zY292ZXJ5TW9kZT0iMCIgZ4NCjxDT05URVhUIG5hbWU9I1VuaXR5IENsawvudCAtIFJldHJpZXZhbCIGBg9jYw1bmFtZT0iQXBwbg1jYXRpb24grW5hYmx1ciAtIFJldHJpZXZlIERVY3VtZW50cyIgLz4NCjxET0NUWVBFIGlkPSiXMDIiIG5hbWU9IkFQIC0gvmVuZG9yIEludm9pY2UiIC8+DQo8RE9DVF1QR5BpZD0iMTAyIiBuYw1lPSJBUCAtIFB1cmNoYXNlIE9yZGVyIiAvPg0KPERPQ1RZUEUgawQ9IjEYnyIgbmFtZT0iQVAgLSBdaGVja3MiIC8+DQo8SE9UU1BPVCBuYw1lPSImbHQ7Jmx0OyBTY3JlZW4gJmd0OyZndDsiIEFsbg93TG12ZURvY3VtZW50UmV0cm1ldmFsPSiXIiBBBgxvd0xpdMVFeGNlCHRpb249IjEiIE1lbw9yaXplT25seT0iMCIgQWxzboZpcmVfdmVudHM9IjAiIFJlcXVpcmVNZW1vcml6ZWREYXRhPSiwiIiBXYXJuaW5nTGv2Zw9IjAiIEF1dG9DbGVhck1lbw9yaXplZERhdGE9IjAiIC8+DQo8U0NSRUVOIG5hbWU9IkFjY291bnRzIFBhewFibGUiIGlkPSJ7M0NCNkZCRkutNZFCRC00QzFCLUI0QZetQTNEMTdCNTEyNZFGfSiGLz4NCjwvU0NSQVBFPg==
```

**After:**

```
PFNDUKFQRT4NCjxBRERJVElPTkFMSU5GTyBHZW5lcmF0ZWRGb3JMaxZlTW9kZT0iMCIgR2VuZXJhdGvKRM9yRG1zY292ZXJ5TW9kZT0iMCIgZ4NCjxDT05URVhUIG5hbWU9I1VuaXR5IENsawvudCAtIFJldHJpZXZhbCIGBg9jYw1bmFtZT0iQXBwbg1jYXRpb24grW5hYmx1ciAtIFJldHJpZXZlIERVY3VtZW50cyIgLz4NCjxET0NUWVBFIGlkPSiXMDIiIG5hbWU9IkFQIC0gvmVuZG9yIEludm9pY2UiIC8-DQo8RE9DVF1QR5BpZD0iMTAyIiBuYw1lPSJBUCAtIFB1cmNoYXNlIE9yZGVyIiAvPg0KPERPQ1RZUEUgawQ9IjEYnyIgbmFtZT0iQVAgLSBdaGVja3MiIC8-DQo8SE9UU1BPVCBuYw1lPSImbHQ7Jmx0OyBTY3JlZW4gJmd0OyZndDsiIEFsbg93TG12ZURvY3VtZW50UmV0cm1ldmFsPSiXIiBBBgxvd0xpdMVFeGNlCHRpb249IjEiIE1lbw9yaXplT25seT0iMCIgQWxzboZpcmVfdmVudHM9IjAiIFJlcXVpcmVNZW1vcml6ZWREYXRhPSiwiIiBXYXJuaW5nTGv2Zw9IjAiIEF1dG9DbGVhck1lbw9yaXplZERhdGE9IjAiIC8-DQo8U0NSRUVOIG5hbWU9IkFjY291bnRzIFBhewFibGUiIGlkPSJ7M0NCNkZCRkutNZFCRC00QzFCLUI0QZetQTNEMTdCNTEyNZFGfSiGLz4NCjwvU0NSQVBFPg,
```

**Tip:** Use a simple text editing program like Notepad to quickly find and replace the necessary characters.

## Manually Creating the AEPop Link

Once the XML scrape data has been encoded into Base64 and formatted, you can create the AEPop link. To create the link, simply append the Base64 data to the end of the following URL string:

```
onbase://ae/xml/?xmlInfo=
```

---

**Note:** Some Web browsers have different string length limitations than others. See [AEPop Character Limitations on page 329](#) for an explanation of these limitations.

---

The following example shows a complete AEPop link after it has been properly formatted and Base64-encoded:

```
onbase://ae/xml/
?xmlInfo=PFNDUKFQRT4NCjxBRERJVE1PTkFMSU5GTyBHZW51cmF0ZWRGb3JMaXZlTW9kZT0iMCIgR2VuZ
XJhdGVkRm9yRGlzY292ZXJ5TW9kZT0iMCIgLz4NCjxDT05URVhUIG5hbWU9IiVuaXR5IENsaWVudCAtIFJ
ldHJpZXZhbCIgBG9jYWxlbmFtZT0iQXBwbGljYXRpb24gRW5hYmxlcjAtIFJldHJpZXZlIERvY3VtZW50c
yIgLz4NCjxET0NUWVBFIGlkPSIxMDEiIG5hbWU9IktFQIC0gVmVuZG9yIEludm9pY2UiIC8-
DQo8RE9DVFlQRSBpZD0iMTAyIiBuYW1lPSJBUCAtIFB1cmNoYXNlIE9yZGVyIiAvPg0KPERPQ1RZUEUgaW
Q9IjEyNyIgbmFtZT0iQVAgLSB0aGVja3MiIC8-
DQo8SE9UU1BPVCBuYW1lPSImbHQ7Jmx0OyBTY3JlZW4gJmd0OyZndDsiIEFsbG93TG12ZURvY3VtZW50Um
V0cm1ldmFsPSIxIiBBbGxvd0xpdmVFeGNlcHRpb249IjEiIE1lbW9yaXplT25seT0iMCIgQWxzZ0ZpcmVF
dmVudHM9IjAiIFJlcXVpcmVNZW1vcml6ZWREYXRhPSIwIiBXYXJuaW5nTG92ZWw9IjAiIEF1dG9DbGVhck
1lbW9yaXplZERhdGE9IjAiIC8-
DQo8U0NSRUV0IG5hbWU9IktFjY291bnRzIFBheWFibGU9IiG1kPSJ7M0NCNkZCRKUtnZFCRC00QzFCLUI0Qz
EtQTNEtMcNTEyNzFGfSIgLz4NCjwvU0NSQVBFPg,,
```

## Testing The AEPop Link

Once you have finished creating the AEPop link, test it by copying and pasting it into an OnBase supported Web browser, or by embedding the link in an iframe element.

---

**Note:** Some Web browsers have different string length limitations than others. See [AEPop Character Limitations on page 329](#) for an explanation of these limitations.

---

If the link test is successful, then the intended context event(s) will occur.

## Creating AEPop Links Using The Demo Interface

Creating AEPop links by using the demo interface requires the completion of the steps listed below.

1. Access the AEPop link creation demo interface.  
See [Accessing the AEPop Link Creation Demo Interface on page 335](#).
2. Format the scrape data XML.  
See [Formatting the Scrape Data XML on page 337](#).

3. Test any links that you created.

See [Testing Generated AEPop Links](#) on page 338.

## Accessing the AEPop Link Creation Demo Interface

---

**Note:** AEPop links cannot be generated in the creation demo interface if non-ASCII characters are entered in the scrape event.

---

In order to access the AEPop link creation demo interface, demo mode needs to be enabled. After enabling demo mode, perform the following steps to display the AEPop link creation demo interface:

1. In your line-of-business application, perform the scrape event for the context(s) that you would like to create a link for.
2. In the scrape event window, click the button labeled **Show/Hide AE URI areas**. Additional text boxes are displayed on the screen.

Show/Hide AE URI areas

```

<SCRAPE>
  <ADDITIONALINFO GeneratedForLiveMode="0"
GeneratedForDiscoveryMode="0" />
  <CONTEXT name="Unity Client - Retrieval"
localename="Application Enabler - Retrieve Documents" />
  <DOCTYPE id="101" name="AP - Vendor Invoice" />

  <DOCTYPE id="102" name="AP - Purchase Order" />

  <DOCTYPE id="127" name="AP - Checks" />

  <HOTSPOT name="&lt;&lt; Screen &gt;&gt;"
AllowLiveDocumentRetrieval="1" AllowLiveException="1"
MemorizeOnly="0" AlsoFireEvents="0" RequireMemorizedData="0"
WarningLevel="0" AutoClearMemorizedData="0" />

  <KEYWORD id="103" name="PO #" value="PO #" indexonly="0"
dataType="10" />

```

AE URI total length: 1121

```

onbase://ae/xml/?xmlInfo=CjxTQ1JBUEU-
CiAgICAgPEFERE1USU9OQUxJTkZPIEdlbmVvYXRlZEZvckxpdmVNB2RlPSIwIi
BH2W51cmF0ZWRGb3JEaXNjb3Z1cnlnb2RlPSIwIiAvPgogICAgIDxDT05URVhU
IG5hbWU9I1VuaXR5IENsaWVudCAtIFJldHJpZXZhbCIgbG9jYWxlbnFtZT0iQX
BwbGljYXRpb24gRW5hYmx1ciAtIFJldHJpZXZ1IERvY3VtZW50cyIgZ4KICAg
ICA8RE9DVF1QRSBpZD0iMTAxIiBuYW1lPSJBUCAtIFZ1bmRvcjBJbnZvaWN1Ii
AvPgoKICAgICA8RE9DVF1QRSBpZD0iMTAyIiBuYW1lPSJBUCAtIFB1cmNoYXN1
IE9yZGVyIiAvPgoKICAgICA8RE9DVF1QRSBpZD0iMTI3IiBuYW1lPSJBUCAtIE
NoZWNRcyIgZ4KICAgICAgPEhPVFNQT1QgZmFtZT0iJmx0OyZsdDsgU2NyZWVu

```

Open AE URI in iFrame

Open AE URI in new window

Beware of IE's length limits (e.g. 507 bytes)

The AEPop link creation demo interface consists of several text boxes and buttons. The first text box contains the scrape data from the context event in an XML format. The

second text box shows the XML data from the first text box, translated into Base64, and appended to a URI prefix. The text in these boxes can be edited as needed. The buttons are used for testing the AEPop link once you are finished creating it.

## Formatting the Scrape Data XML

After you display the AEPop link creation demo interface, you can format the XML data by removing elements which are not required as part of the link. This helps reduce the overall character count of the link.

The **CONTEXT name** field is required. The following elements and/or field values can safely be removed from the scrape data XML for the purpose of reducing the character count of the AEPop link:

- The **CONTEXT localename** field value
- The **ADDITIONALINFO** element
- The **HOTSPOT** element
- The **SCREEN** element
- The **DOCTYPE name** field value
- The **KEYWORD name** field value
- Any **KEYWORD value** field values (if necessary)

---

**Note:** Although you can safely remove the **DOCTYPE name**, **KEYWORD name**, and **KEYWORD value** field values, the **DOCTYPE id** and **KEYWORD id** field values are still required.

---



---

**Note:** Context names are case-sensitive. Ensure that the character case of the context in the XML matches the character case of the context as it is displayed in Application Enabler. Incorrectly formatted contexts will not be recognized.

---



---

**Caution:** Do not remove entire **value** fields from XML elements if there are missing or empty values (e.g., **KEYWORD value=""**). Removing entire **value** fields that have empty values will cause silent errors to occur when attempting to access the AEPop link.

---

As you format the XML data in the first text box, the AEPop link that is generated in the second text box updates dynamically. A character counter is also displayed between the two text boxes. The counter displays the character count of the generated AEPop link the second text box.

The following example shows original unformatted scrape event XML data:

```
<SCRAPE>
<ADDITIONALINFO GeneratedForLiveMode="0" GeneratedForDiscoveryMode="0" />
<CONTEXT name="Unity Client - Retrieval" localename="Application Enabler - Retrieve Documents" />
<DOCTYPE id="101" name="AP - Vendor Invoice" />
<DOCTYPE id="102" name="AP - Purchase Order" />
<DOCTYPE id="127" name="AP - Checks" />
<HOTSPOT name="&lt;&lt; Screen &gt;&gt;" AllowLiveDocumentRetrieval="1"
```



```

AllowLiveException="1" MemorizeOnly="0" AlsoFireEvents="0"
RequireMemorizedData="0" WarningLevel="0" AutoClearMemorizedData="0" />
<KEYWORD id="103" name="Customer Name" value="O&apos;Doyle Economical Imports"
indexonly="0" dataType="10" />
<KEYWORD id="114" name="Invoice #" value="1220" indexonly="0" dataType="10" />
<SCREEN name="Accounts Payable" id="{3CB6FBFE-71BD-4C1B-B4C1-A3D17B51271F}" />
</SCRAPE>

```

The following example shows the previous XML data example, after it has been correctly formatted to remove unnecessary or unwanted data. The **CONTEXT localname**, **DOCTYPE name**, and **KEYWORD name** values were also removed.

```

<SCRAPE>
<CONTEXT name="Unity Client - Retrieval" localname="" />
<DOCTYPE id="101" name="" />
<DOCTYPE id="102" name="" />
<DOCTYPE id="127" name="" />
<KEYWORD id="103" name="" value="O&apos;Doyle Economical Imports" indexonly="0"
dataType="10" />
<KEYWORD id="114" name="" value="1220" indexonly="0" dataType="10" />
</SCRAPE>

```

## Testing Generated AEPop Links

Once you have finished formatting the scrape data XML, you can test the AEPop link that is generated in the second text box.

Test the AEPop link by using any of the following methods:

- Copy and paste the AEPop link into a supported Web browser.
- Click the button labeled **Open AE URI in iFrame**.  
This button simulates opening the link from an iframe element.
- Click the button labeled **Open AE URI in new window**.  
This button simulates opening the link in a new window.

---

**Note:** Some Web browsers have different string length limitations than others. See [AEPop Character Limitations on page 329](#) for an explanation of these limitations.

---

If the link test is successful, then the intended context event(s) will occur.

## Overview

Connector is a platform used to create custom integrations that will enable you to use Application Enabler functions in your line-of-business applications quickly and easily. Application Enabler allows you to configure a relation between a keyword in your line-of-business application to a keyword in OnBase through the use of an Alias, i.e., a value that you configure in Application Enabler to stand for the keyword. This eliminates the need for learning new key-commands to perform contexts, and instead you can simply click a button or link which you can add to your application. And unlike AEPop links, which can only use Application Enabler contexts, Connector allows you to use all contexts from any other module that Application Enabler can execute and your system is licensed to use.

## Requirements

Connections configured in Application Enabler and executed in the line-of-business application can be consumed either through posting data to the HTTPListener or by using AEPop Connector links.

## HTTPAutomation and HTTPSAutomation

In order for users to consume connections by posting to the listener, both Application Enabler and HTTPAutomation or HTTPSAutomation must be enabled on the user's workstation.

For information about configuring HTTPAutomation or HTTPSAutomation, see [Configuring HTTPAutomation and HTTPSAutomation on page 314](#).

---

**Note:** You can also enable HTTPAutomation or HTTPSAutomation during installation of the Unity Client. For more information, see the Unity Client module reference guide.

---

## AEPop Connector Links

AEPop Connector links do not rely on the same configuration settings as the other AEPop links.

Though they are similar in that they are both Pop links, the major difference between AEPop Connector links and AEPop links is the AEPop Connector link's parameters are configured in Application Enabler Configuration, while the AEPop link is not. For more information on configuring and using AEPop links, see [AEPop Link Configuration on page 329](#).

---

**Note:** The Unity Client process does not need to be running; consuming an AEPop Connector link will automatically start the process if it is not running.

---

Depending on the requirements for your application, for example if you are using parameterized URLs, certain other restrictions may apply, such as URL character length limits in browsers.

## Configuration

Connector is configured in Application Enabler Configuration.

### Creating a new Action

An action is a context or series of contexts that Application Enabler will run when the action is called after consuming the connection in the line-of-business application.

To create a new action:

1. Open Application Enabler Configuration.
2. Click **Add New Action** in the **Enabled Connections** section in the lower left of the dialog box. The **Action** dialog box is displayed.

Select which Category and Connection this Action will belong to. Create a unique Action name describing what this Action will accomplish when sent to Application Enabler.

**Connection & Category**

Connection: << DefaultConnection >> [Add Connection]

Category: << DefaultCategory >> [Add Category]

**Action**

Name: [Text Field]

**Contexts**

One or more contexts can be configured to run when this Action is called. Use the buttons on the right to edit the contexts associated with this Action.

Client	Action
Application Enabler	Retrieve Documents

[New] [Edit] [Delete]

< Back [Next >] [Cancel] [Help]

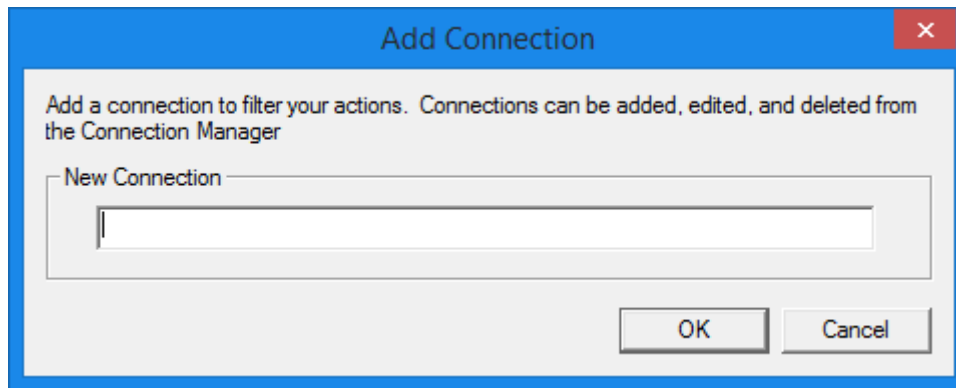
3. Click **Add Connection** to create a new connection, or skip to step 4 to use the default connection.

---

**Note:** Connections are a way for you to sort and filter different integrations in Application Enabler. For more information see [Modifying Connections on page 348](#). You do not need to configure a new connection. Application Enabler will use the default connection and function as normal as long as you have not configured a specific connection in the URI.

---

The **Add Connection** dialog box is displayed.



Enter a name in the **New Connection** field and click **OK**.

Click **Cancel** to return to the **Action** dialog without adding a new connection.

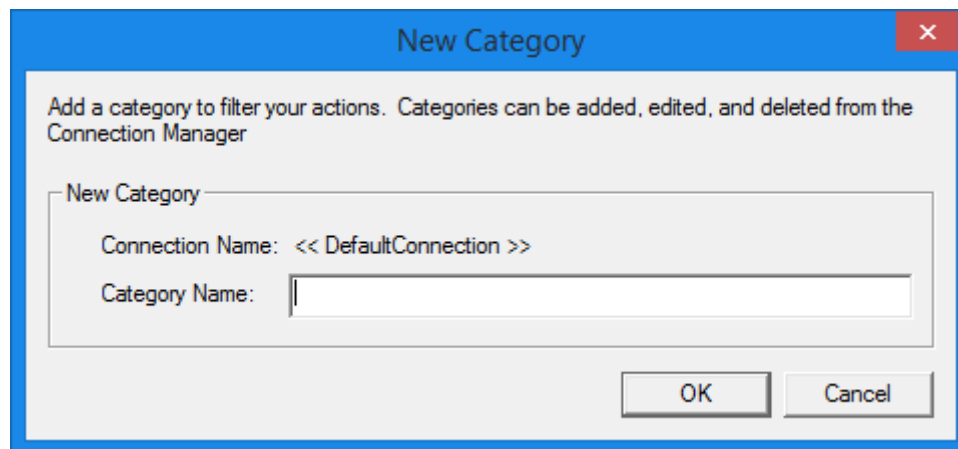
- Click **Add Category** to create a new category, or skip to step 5 to use the default category.

---

**Note:** Categories are a way for you to further sort and filter different integrations in Application Enabler. For more information, see [Modifying Categories on page 350](#). You do not need to configure a new category. Application Enabler will use the default category and function as normal as long as you have not configured a specific category in the URI.

---

The **Add Category** dialog box is displayed.



Enter a name in the **Category Name:** field and click **OK**.

Click **Cancel** to return to the **Action** dialog without adding a new category.

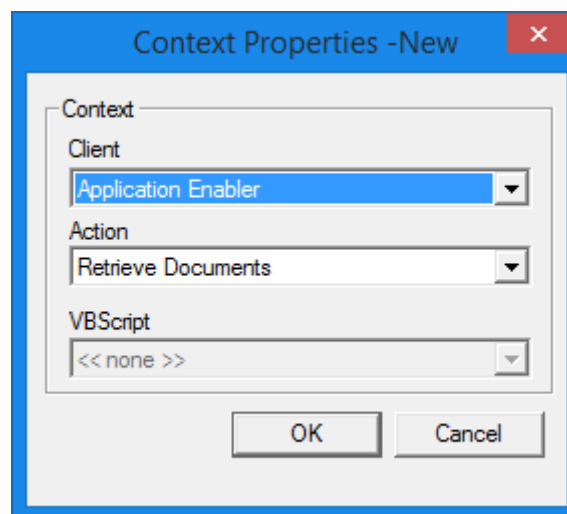
- Enter the desired name in the **Name** field.

---

**Note:** The **Name** field cannot be left blank.

---

- Click **New** in the **Contexts** frame. The **Context Properties -New** dialog box is displayed.



7. In the **Client** drop-down select the desired Client.
8. In the **Action** drop-down select the desired Action.  
If you chose either Application Enabler or Desktop as the client and Run Script as the action, you may then chose a script from the **VBScript** drop-down.

**Note:** For more information on configuring all possible contexts, see [Using Contexts](#) on page 288.

9. Click **OK**.  
Click **Cancel** to close the **Context Properties -New** dialog box and return to the **Action** dialog box without making any changes.
10. Click **Next**. The **Document Type(s):** dialog box is displayed.

Document Type(s):

Select document types to include when completing the context configured for this action.

Available		Selected
AP - Checks	Add > Add All >> < Remove << Remove All	
AP - Credit Memo		
AP - Invoice Coding Form		
AP - Non PO Vendor Invoice		
AP - Packing Slip		
AP - Partial Payment Record		
AP - Purchase Order		
AP - Purchase Requisition		
AP - Vendor Invoice		

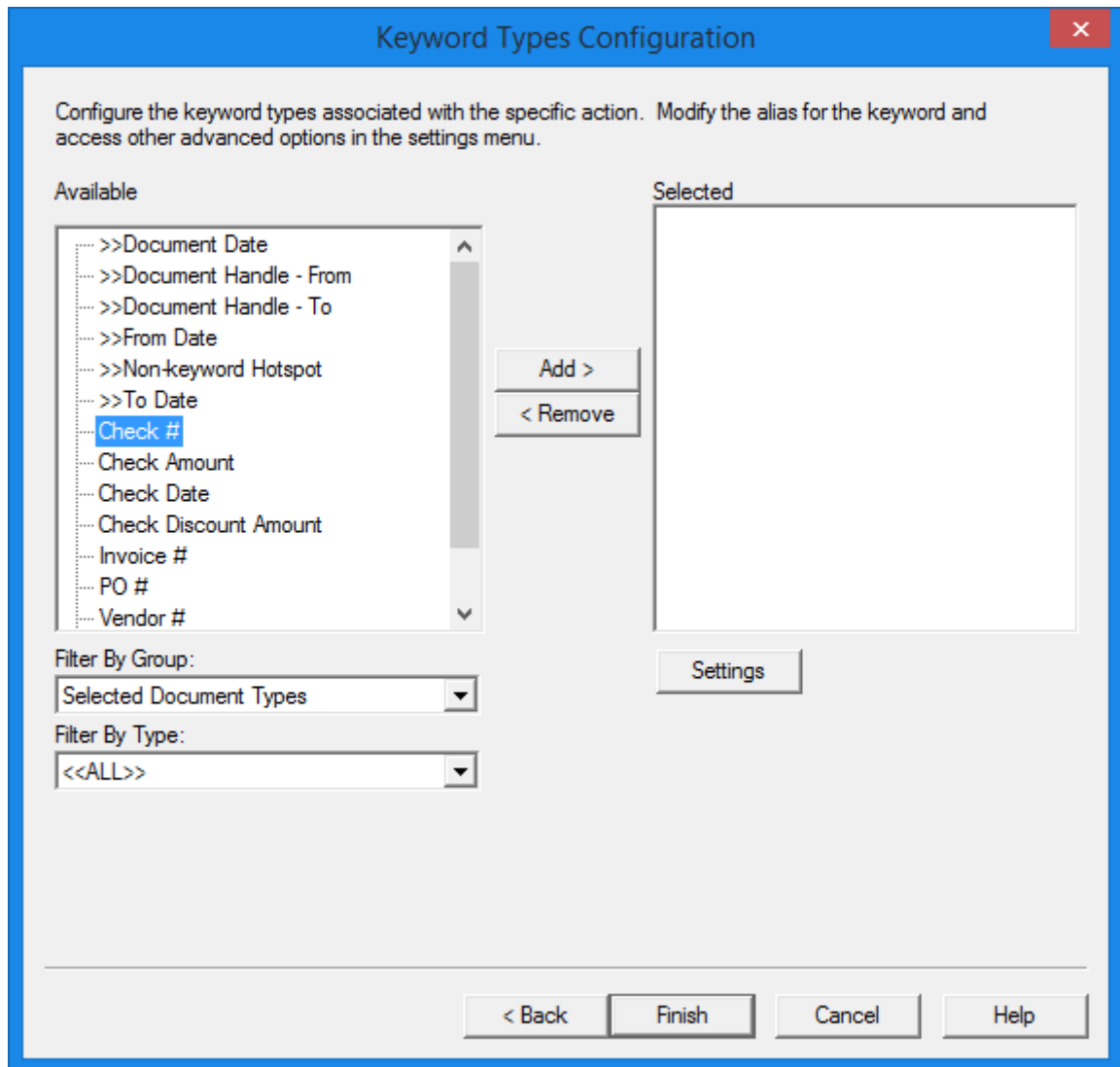
Filter By:  
Accounts Payable

< Back   Next >   Cancel   Help

11. Double-click on the desired document type(s) in the **Available** list to add it to the **Selected** list. Alternatively, you can click on the desired document type once to select it and then click **Add >**.

You can filter which documents you want to see by Document Type Group by clicking the **Filter By:** drop-down and selecting the desired Document Type Group.

12. Click **Next >**. The **Keyword Types Configuration** dialog box is displayed.





13. Double-click on the desired keyword type(s) in the **Available** list to add it to the **Selected** list. Alternatively, you can click on the desired keyword type once to select it and then click **Add >**.

You can filter which keywords you want to see by Group or by Type by clicking the **Filter By Group:** drop-down and the **Filter By Type:** drop-down and selecting the desired Document Types or Groups. For more information about all available groups and types, see [Associating Keyword Types, Unity Form Fields, or WorkView Attributes on page 57](#).

If you are configuring a Unity Form, select Unity Form fields in the **Available** list and click **Add >**.

If you are configuring a WorkView attribute, select the attribute in the **Available** list and click **Add >**. Nested attributes are displayed with a + symbol.

14. When you add a keyword type to the **Selected** list, the **Settings:[Keyword Type]** dialog box is displayed.

The screenshot shows a Windows-style dialog box titled "Settings:Check #". It has a blue title bar with a close button (X). Below the title bar are four tabs: "General", "Strip", "Parse", and "Append", with "General" being the active tab. The main content area is titled "Keyword Settings" and contains the following elements:

- A "Name" text box containing the text "Check #".
- An "Alias" text box containing the text "Check #".
- A note below the Alias box: "\*The alias can be modified to match the name for the equivalent keyword in the external system".
- A checkbox labeled "Required keyword" which is currently unchecked.
- A "Warning Level:" label followed by a dropdown menu showing "Warn and continue".

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

15. The name of the keyword as it is used in OnBase is displayed in the **Name** field. If necessary, in order to make configuring your line-of-business application as easy as possible, you can change the name in the **Alias** field to match the equivalent keyword in the line-of-business application. This defines the relationship between the keyword in OnBase and the keyword in the line-of-business application.

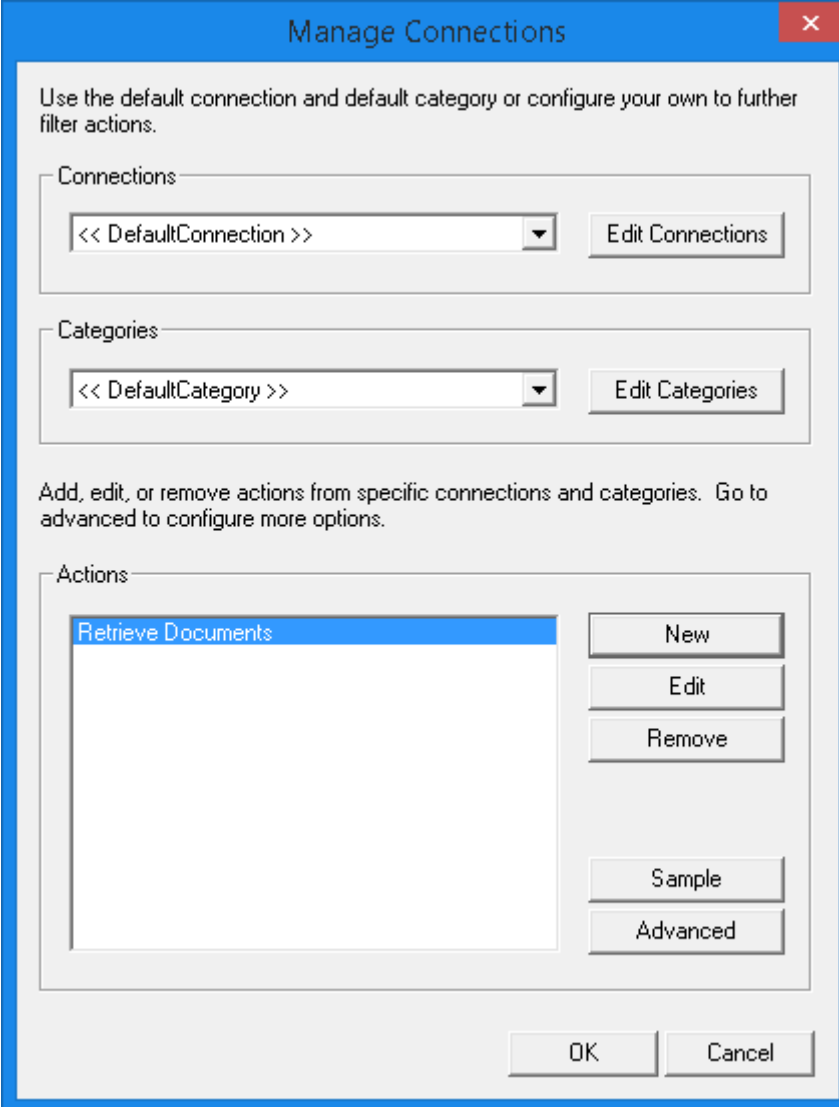
---

**Note:** Changing the name in the **Alias** field will not have any effect on the keyword's behavior or function in OnBase.

---

For more detailed information on configuring your keywords, see [Settings on page 63](#).

16. When you are finished configuring the keyword, click **OK** to return to the **Keyword Types Configuration** dialog.
17. If you wish to add more keywords, repeat steps 12-16. Otherwise, click **Finish**. The **Manage Connections** dialog box is displayed.



The **Manage Connections** dialog box is shown. It has a blue title bar with a close button (X). The main area is light gray and contains the following sections:

- Connections:** A dropdown menu showing "<< DefaultConnection >>" and an "Edit Connections" button.
- Categories:** A dropdown menu showing "<< DefaultCategory >>" and an "Edit Categories" button.
- Actions:** A list box containing "Retrieve Documents" (which is highlighted in blue). To the right of the list box are five buttons: "New", "Edit", "Remove", "Sample", and "Advanced".

At the bottom of the dialog are "OK" and "Cancel" buttons. Above the "Actions" section, there is a line of text: "Add, edit, or remove actions from specific connections and categories. Go to advanced to configure more options."

18. Click **OK** to save your connection and return to the Application Enabler Configuration main screen.

Click **Cancel** to return to the Application Enabler Configuration main screen without saving and lose any changes.

## Managing Connections

The **Manage Connections** dialog box, accessed from Application Enabler Configuration by clicking **Manage Connections**, allows you to view, add, modify, or remove any configured connections.

### Modifying Connections

A connection is a way of grouping a collection of actions for a particular application. Actions can be further filtered within a connection by configuring categories. You can select different connections by clicking the **Connections** drop-down.

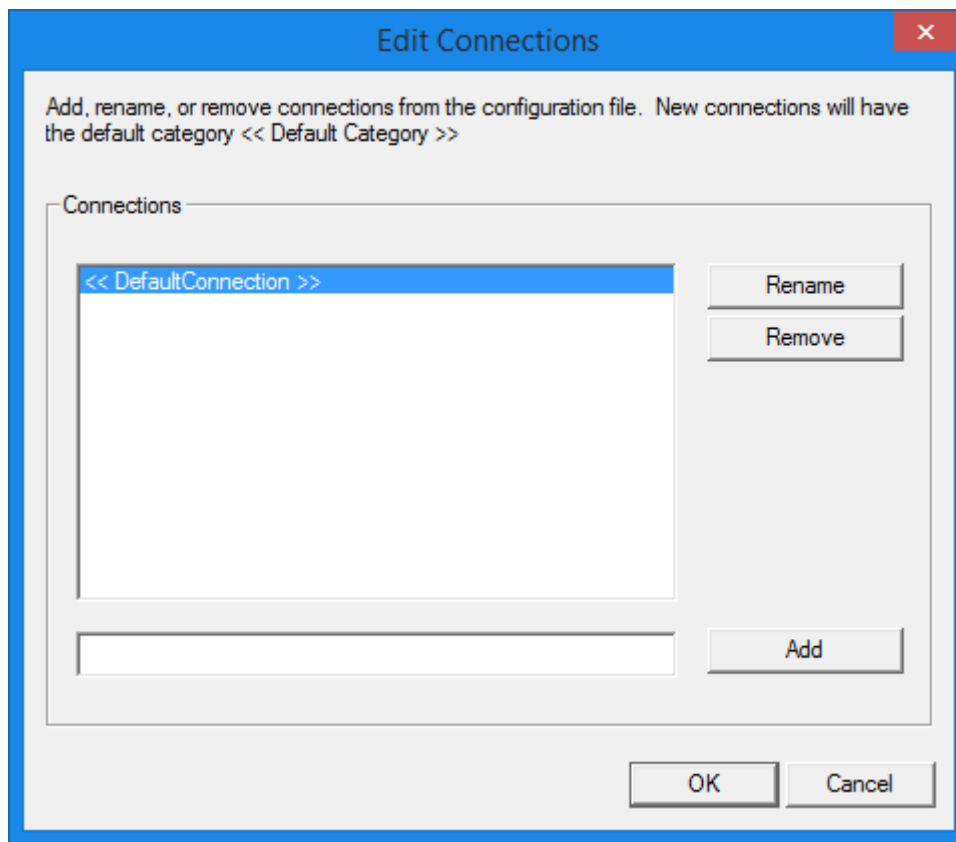
---

**Note:** You do not need to configure a new connection. Application Enabler will use the default connection and function as normal.

---

To add a new connection:

1. In the **Manage Connections** dialog box, click **Edit Connections**. The **Edit Connections** dialog box is displayed.



2. Enter a name in the lower field and click **Add**.

---

**Note:** New connections will have the default category of <<DefaultCategory>>.

---

3. The new connection will be displayed in the list of available connections.

To rename a connection:

1. Click the desired connection in the **Connections** list to select it. Click **Rename**.
2. The item in the list will display the active cursor and you can rename the connection to the new name. Click anywhere to confirm the new name.

To remove a connection:

1. Click the desired connection in the **Connections** list to select it. Click **Remove**.
2. A message is displayed with the text **Are you sure you'd like to remove the [Connection Name] connection?**  
Click **Yes** to remove the connection.  
Click **No** to keep the connection.

---

**Note:** You cannot delete all connections. If you delete all connections, the **<<DefaultConnection>>** connection will be the default connection.

---

## Modifying Categories

A category is a way of further filtering different sets of actions within a connection. You can select different categories by clicking the **Categories** drop-down.

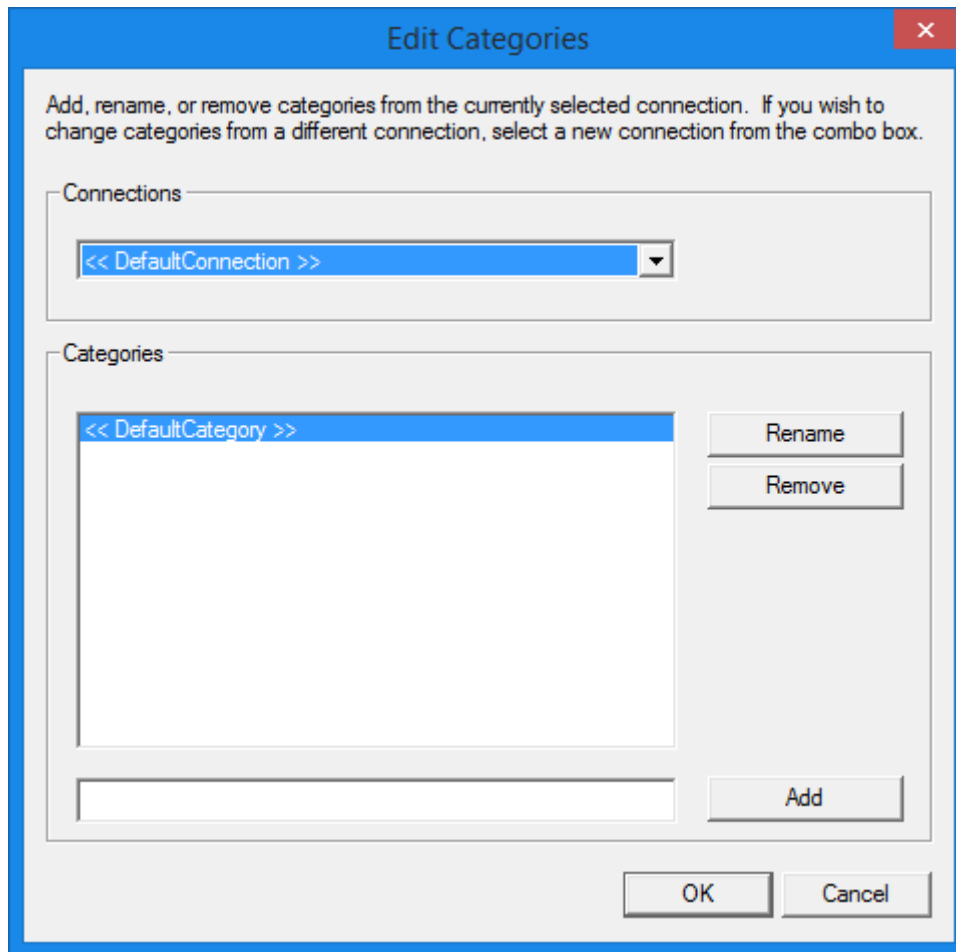
---

**Note:** You do not need to configure a new category. Application Enabler will use the default category and function as normal.

---

To add a new category:

1. In the **Manage Connections** dialog box, click **Edit Categories**. The **Edit Categories** dialog box is displayed.



2. In the **Connections** drop-down, select the desired connection for the new category.
3. Enter a name in the lower field and click **Add**.
4. The new category will be displayed in the **Categories** list.

To rename a category:

1. Click the desired category in the **Categories** list to select it. Click **Rename**.
2. The item in the list will display the active cursor and you can rename the category to the new name. Click anywhere to confirm the new name.

To remove a category:

1. Click the desired connection in the **Categories** list to select it. Click **Remove**.
2. A message is displayed with the text **Are you sure you'd like to remove the category name [Category Name] from the connection named [Connection Name]?**  
Click **Yes** to remove the category.  
Click **No** to keep the category.

---

**Note:** You cannot delete all categories. If you delete all categories, the <<DefaultCategory>> category will be the default category.

---

## Modifying Actions

You can add, edit, or remove actions from the **Manage Connections** dialog.

To add an action:

1. In the **Actions** section, click **New**.
2. The **Action** dialog box is displayed. See [Creating a new Action on page 340](#) for instructions.

To edit an action:

1. In the **Actions** section, click **Edit**.
2. The **Action** dialog box is displayed.
3. You can change the name of the action by clicking in the Name field to place the cursor in the field and make any necessary changes.
4. You can add, edit, or delete contexts. For more information, see [Using Contexts on page 288](#).
5. When finished making changes, click **Next >**. The **Document Type(s):** dialog box is displayed.
6. Double-click on the desired document type(s) in the **Available** list to add it to the **Selected** list. Alternatively, you can click on the desired document type once to select it and then click **Add >**.  
You can filter which documents you want to see by Document Type Group by clicking the **Filter By:** drop-down and selecting the desired Document Type Group.
7. Click **Next >**. The **Keyword Types Configuration** dialog box is displayed.

8. Double-click on the desired keyword type(s) in the **Available** list to add it to the **Selected** list. Alternatively, you can click on the desired keyword type once to select it and then click **Add >**.  
You can filter which keywords you want to see by Group or by Type by clicking the **Filter By Group:** drop-down and the **Filter By Type:** drop-down and selecting the desired Document Types or Groups. For more information about all available groups and types, see [Associating Keyword Types, Unity Form Fields, or WorkView Attributes on page 57](#).  
If you are configuring a Unity Form, select Unity Form fields in the **Available** list and click **Add >**.  
If you are configuring a WorkView attribute, select the attribute in the **Available** list and click **Add >**. Nested attributes are displayed with a + symbol.
9. When you add a keyword type to the **Selected** list, the **Settings:[Keyword Type]** dialog box is displayed.
10. You can change the name in the **Alias** field to match the equivalent keyword in the line-of-business application.

---

**Note:** Changing the name in the **Alias** field will not have any effect on the keyword's behavior or function in OnBase.

---

For more detailed information on configuring your keywords, see [Settings on page 63](#).

11. When you are finished configuring the keyword, click **OK** to return to the **Keyword Types Configuration** dialog.
12. If you wish to add more keywords, repeat steps 8-11. Otherwise, click **Finish**.

---

**Note:** At any point in the document or keyword configuration, you can click **Cancel** to exit the dialog without saving any changes.

---

To remove an action:

1. In the **Actions** section, click **Remove**.
2. A message stating **Are you sure you'd like to remove the [Action Name] action?** is displayed.  
Click **Yes** to remove the action.  
Click **No** to keep the action.

## Advanced Action Configuration Settings

If you are configuring actions other than simply retrieving documents, such as creating a new Unity Form, retrieving Folders, or performing WorkView object retrieval or creation, then you will need to configure that in the **Action Configuration** dialog box.



To configure advanced action configuration settings:

1. In the **Actions** section click **Advanced**. The **Action Configuration: [Action Name]** dialog box is displayed.

**Action Configuration: Retrieve AP Documents**

General | Document Composition | Folders | Date | Memorization | Other Elements

Custom Query: << none >>

E-Forms: << none >>

☐ Virtual E-Form

☐ Display E-Form after scrape event

Unity Forms: << none >>

Workflow

Life Cycle: << none >>

Queue: << none >>

☐ Select the first document in the queue

WorkView

Applications: << none >>

Classes: << none >>

Filters: << none >>

☐ Display WorkView object after creation

☒ Include all configured keywords when posting events from this screen

OK Cancel Help

2. The **General** tab contains options for retrieval.
  - a. If you would like to retrieve documents using a custom query, select the appropriate **Custom Query** from the drop-down list. Folder Type custom queries are not supported, and are not available from the **Custom Query** drop-down list. This option is used in conjunction with Custom Query contexts. When using this option, the Document Type(s) that documents are retrieved from are determined by the Document Types configured for the selected custom query. The Document Types configured for Application Enabler do not affect the documents retrieved using the defined Custom Query for the Custom Query context.

---

**Note:** When using Application Enabler to retrieve documents using a Custom Query, all values associated with the Custom Query must be provided by Application Enabler. Application Enabler cannot pull values from HTML Forms being used for the Custom Query.

---

- b. If you want to create an E-Form upon a scrape event, select the appropriate Document Type from the **E-Forms** drop-down list. If you want the E-Form to be created as a Virtual E-Form, select the **Virtual E-Form** check box. If you want the E-Form that is created to display after the screen scrape, select the **Display E-Form after scrape event** check box.
  - c. If you want to create a Unity Form upon a scrape event, select the appropriate Unity Form from the **Unity Forms** drop-down list.

---

**Note:** Repeating sections on Unity Forms and property controls such as **Created By**, **Current User's Display Name**, etc., are not supported for use with Application Enabler.

---

- d. If you want to retrieve documents from a Workflow life cycle or queue, configure the **Workflow** section of the tab. If you want to retrieve from a life cycle, select the appropriate item from the **Life Cycle** drop-down list and leave the **Queue** drop-down list as **<<any>>**. This configuration will allow users to select the queue they want to open upon scraping. If you want to specify a specific queue to retrieve from, select the appropriate **Life Cycle** from the drop-down list and the appropriate **Queue** from the drop-down list. If you want the first document listed within a queue to be selected and displayed, select the **Select the first document in the queue** option. When this option is not selected, Application Enabler will attempt to find a document within the selected queue that has keyword values that match the values that are scraped. The first document found with matching keyword values within the queue will be selected and display.

If you select **<<auto find>>** from the **Queue** drop-down list, Application Enabler will automatically try to find the document in the queues of the selected life cycle. If scraped values match a single document, the matching document is opened in Workflow. If scraped values match multiple documents, the first document that matches in the life cycle is opened in Workflow. If scraped values do not match a document, Workflow opens, but no document is displayed. A blank scrape will display the first document of the first queue.

---

**Note:** If the **Auto Find** button is clicked when executing Workflow Retrieval from Application Enabler, the **Select the first document in the queue** option will be ignored. The **Auto Find** button is only available when **<<any>>** is selected from the **Queue** drop-down list.

---

- e. If you want to perform WorkView retrieval or object creation, configure the **WorkView** section of the tab. Select a WorkView application from the **Applications** drop-down list, a class from the **Classes** drop-down list, and a filter from the **Filters** drop-down list. The application, class, and filter should match your WorkView configuration in the **Keyword Type Configuration** dialog box.

---

**Note:** If you selected a WorkView attribute in the **Document Type(s):** dialog box, the application and class associated with the attribute are displayed.

---

If you want to display the WorkView object after creating it, select the **Display WorkView object after creation** check box.

---

**Tip:** Ensure that you consider any scripting that will be performed on newly created WorkView objects when configuring these settings.

---

- f. If you want all Keyword Values scraped from the screen for indexing when the selected hotspot is initiated, select **Include all configured keywords when posting events from this screen**.

---

**Note:** This check box does not affect values used for retrieval.

---

3. Click the **Document Composition** tab if you want to create a document with the Document Composition module using the selected action. See [Configuring Document Composition on page 281](#) for more information.
4. Click the **Folders** tab if you want to retrieve a Folder or a Document Tracking Folder using the selected action.  
If you would like to retrieve from a folder type using the selected action, select the appropriate folder type from the **Folder** drop-down list. This option is used in conjunction with all Folder Retrieval contexts. To retrieve from a Document Tracking folder type, select the appropriate folder type from the **Document Tracking Folder** drop-down list. This option is used in conjunction with all Document Tracking Folder Retrieval contexts.
5. Click the **Date** tab if you want to specify date parameters for retrieval using the selected action. See [Setting Date Parameters for Retrieval on page 284](#) for more information.

6. Click the **Memorization** tab if you want to store scraped keywords for later use on subsequent scrape events. See [Configuring Memorization on page 284](#) for more information.
7. Click the **Other Elements** tab to configure custom actions. See [Creating a Custom Element for Sorting Documents upon Scrape on page 312](#) for more information.
8. Click **OK** when your selection is complete. Application Enabler Configuration returns you to **Manage Connections** dialog box. Repeat the above steps for each action you wish to configure. These configuration settings can be modified at any time by clicking **Advanced** in the **Manage Connections** dialog box.
9. Click **OK**.

## Configuring a method to consume Connections

There are three methods of configuring connections to be consumed by your application: JSON object, parameterized URL, and AEPop Connector link

You can view a sample URL or JSON object in the **Manage Connections** dialog box.

1. Click to select the desired action that you wish to view the sample URL or JSON for.
2. Click **Sample**. The **Connector Sample** dialog box is displayed.

Connector Sample

Use the sample URL and JSON object generated from your current configuration as an example of how to consume your connection. Replace the keyword values with the corresponding keyword data.

Sample URL

```
onbase://AE/Connector?Connection=Sample+AP+Connection&Category=Sample+AP+Category&Action=Open+Unity+Form&(+AP+-+Partial+Payment+Record+)-+po6=KeywordValue
```

Sample JSON

The JSON object is sent as POST data using the following URL: "http://localhost:<Port Number>/AE/Connector"

```
{"Action":{"Name":"Open Unity Form"},"Category":{"Name":"Sample AP Category"},"Connection":"Sample AP Connection","Keywords":[{"Name":"( AP - Partial Payment Record ) - po6","Value":"KeywordValue"}]}
```

\* Advanced configuration settings are stored in the configuration file and applied at run time

OK

3. Click **OK** when finished.

---

**Note:** Non-ASCII characters are percent-encoded in a URL.

---

## JSON Object

You can build your own JSON object using the values of the keywords and actions you have configured in Application Enabler. The JSON object is sent as POST data using the following URL:

`http://localhost:<Port Number>/AE/Connector`

Example of a JSON connection:

```
{
  "Connection": "Sample AP Connection",
```

Replace "Sample AP Connection" with the name of your own connection.

```
  "Category": { "Name": "Sample AP Category" },
```

Replace "Sample AP Category" with the name of your own category.

```
  "Action": { "Name": "Retrieve AP Documents" },
```

Replace "Retrieve AP Documents" with the name of your own action.

```
  "Keywords": [ { "Name": "PO #", "Value": "656" } ]
```

You can add any number of Keywords by repeating the string

`{ "Name": "KeywordType", "Value": "KeywordValue" }` and replacing the KeywordType and KeywordValue with your own values. Ensure all keyword strings are inside the [ ] brackets.

```
}
```

The JSON object in its entirety:

```
{ "Connection": "Sample AP Connection", "Category": { "Name": "Sample AP
Category" }, "Action": { "Name": "Retrieve AP
Documents" }, "Keywords": [ { "Name": "PO #", "Value": "656" } ] }
```

If the actions you have configured in Application Enabler are using the default connection or category, the JSON object does not need to contain the connection or category, and depending on your configuration could look like this:

```
{ "Action": { "Name": "Retrieve AP Documents" }, "Keywords": [ { "Name": "PO
#", "Value": "656" } ] }
```

## Parameterized URL

The parameterized URL method executes the Application Enabler context using parameters in a URL link. You can either make a GET request to the URL or direct the user's browser to it.

Example of a parameterized URL connection:

```
http://localhost:15412/AE/  
Connector?Connection=Sample%20AP%20Connection&Category=Sample%20AP%20Cate  
gory&Action=Retrieve%20AP%20Documents&P0%20%23=656
```

If the actions you have configured in Application Enabler are using the default connection or category, the URL does not need to contain the connection or category, and depending on your configuration could look like this:

```
http://localhost:15412/AE/  
Connector?Action=Retrieve%20AP%20Documents&P0%20%23=656
```

## AEPop Connector Link

You can consume AEPop Connector links by adding the link to your line-of-business application.

Example of an AEPop Connector link:

```
onbase://AE/  
Connector?Connection=Sample%20AP%20Connection&Category=Sample%20AP%20Cate  
gory&Action=Retrieve%20AP%20Documents&P0%20%23=656
```

If the actions you have configured in Application Enabler are using the default connection or category, the URL does not need to contain the connection or category, and depending on your configuration could look like this:

```
onbase://AE/Connector?Action=Retrieve%20AP%20Documents&P0%20%23=656
```

# PRE-PROCESS SCRIPTING FOR ADVANCED PARSING

Pre-process scripts can be used to manipulate data scraped from the line-of-business application using VBScript. A VBScript may be used to parse and modify Keyword Values before they are processed by Application Enabler.

## Using Pre-Process Scripts

### Pre-Process Scripting Requirements

The VBScript file must have the extension 'aes' (Application Enabler Script). The name itself must be the exact name of the configured screen. There is no limit to the number of Keyword Types that can be included in this script file. There is one 'aes' file per screen. The aes file should be placed in the same directory as the Application Enabler executable file. It must be saved in Unicode encoding.

---

**Note:** When deploying Application Enabler using ClickOnce with a default configuration file, the path to the aes file must be specified in the **PreProcess Scripts Location** field in the Application Enabler configuration file. You can also use the **PreProcess Scripts Location** field to specify a shared location so multiple workstations can use the same configuration file.

---

The **msscript.ocx** file must be registered on the client workstation. Depending on your operating system, this is accomplished by running one of the following commands from the **Start | Run** prompt:

Regsvr32.exe c:\windows\system\msscript.ocx

or

Regsvr32.exe c:\windows\system32\msscript.ocx

---

**Note:** For more information regarding **msscript.ocx**, please see the following Microsoft Knowledge Base article: <http://support.microsoft.com/kb/184739>.

---

---

**Note:** For 64-bit operating systems, regsvr32 must be run from the Windows\SYSWOW64 directory.

---

---

**Note:** For added restrictions in DDE Scripting, see [DDE Pre-Process Scripting on page 363](#).

---

### Creating Pre-Process Scripts

Functions inside the script must have the exact name of the Keyword Type for which data will be scraped.

Syntax:

```
Function KeywordTypeName (InputValue)
---- code to manipulate text --
KeywordTypeName = "Return Value"
End Function
```

Function names in the script must match the keyword name being parsed or processed, omitting all spaces and special characters, so that the function names respect VBScript variable and function naming requirements. Example: If the Keyword Type name is Customer (01) (second instance of the Customer Keyword Type) in your function, you would use Customer01 as the Keyword Type name.

If your Keyword Types have the # character in their names, replace the # character with the word **Number** in the script. Application Enabler will be able to link **Number** in the script with the # character in the configuration file. For example, a configured keyword named "Account #" would have a function name of "AccountNumber".

Functions must accept an input parameter named "InputValue", and return the Keyword Value to be processed by Application Enabler.

---

**Note:** You can also omit return of a value completely. The script will continue to execute as normal, and Application Enabler will function as though that Keyword had not been scraped.

---



---

**Note:** When removing special characters and spaces, Application Enabler will validate Keyword Types that match the function name when special characters and spaces are ignored. For example, if you have two Keyword Types and one is named >>**Document Date** and the other is **Document Date**, the function name for both would be **DocumentDate**. Therefore, if both Keyword Types are configured for Application Enabler, both Keyword Types will validate against the function. Ensure that configured Keyword Types will validate as desired based on the naming conventions.

---



---

**Caution:** Do not modify scraped date formats with a pre-process script. The date format is always passed as MM-dd-yyyy. Modifying the date format will cause errors to occur.

---

## Example of Parsing a Keyword Out of Window Title

**Scenario:** An enabled application contains a window title with a name in it, which needs to be parsed out. The window title is mapped to a "First Name" keyword, and a "Last Name" keyword. The following example uses a pre-processing script to parse the First Name and Last Name values out of the window title.

**Window title example:** "Customer Name - John Doe. #15398"

```
Function FirstName(InputValue)
```

Declare a string to temporarily hold data.

```
Dim strTempValue
```

Parse out the first name value from the window title.



Assuming "Customer Name - " will always be part of the window title, parsing will start at the 17th character.

To determine when the first name ends, which will be the first occurrence of a space after the 17th character, declare a variable to store the location of the first space, after the 17th character.

```
Dim intSpaceLocation
```

Using the `InStr()` function, determine the location of the first space after the 17th character

```
intSpaceLocation = InStr(17, InputValue, " ")
```

Parse the first name using the previous values

```
strTempValue = mid(InputValue, 17, intSpaceLocation - 17)
```

Return the parsed value by setting the function equal to the value.

```
FirstName = strTempValue
```

```
End Function
```

```
Function LastName(InputValue)
```

Declare a string to temporarily hold data.

```
Dim strTempValue
```

Parse out the last name value from the window title.

Assuming "Customer Name - " and a first name will always be part of the window title, we will start after the first name.

Determine when the first name ends, which will be the first occurrence of a space after the 17th character.

Declare variables to store the location of the first space after the 17th character, and first period after the space.

```
Dim intSpaceLocation
```

```
Dim intPeriodLocation
```

Using the `InStr()` function, determine the location of the first space after the 17th character.

```
intSpaceLocation = InStr(17, InputValue, " ")
```

Using the `InStr()` function, determine the location of the first period after the first space.

```
intPeriodLocation = InStr(intSpaceLocation, InputValue, ".")
```

Parse the last name using the previous values

```
strTempValue = mid(InputValue, intSpaceLocation, intPeriodLocation  
- intSpaceLocation)
```

Return the parsed value by setting the function equal to the value.

```
LastName = strTempValue
```

```
End Function
```

The script in its entirety:

```
Function FirstName(InputValue)
```

```
Dim strTempValue
```

```
Dim intSpaceLocation
intSpaceLocation = InStr(17, InputValue, " ")
strTempValue = mid(InputValue, 17, intSpaceLocation - 17)
FirstName = strTempValue
End Function

Function LastName(InputValue)
Dim strTempValue
Dim intSpaceLocation
Dim intPeriodLocation
intSpaceLocation = InStr(17, InputValue, " ")
intPeriodLocation = InStr(intSpaceLocation, InputValue, ".")
strTempValue = mid(InputValue, intSpaceLocation, intPeriodLocation -
intSpaceLocation)
LastName = strTempValue
End Function
```

## DDE Pre-Process Scripting

---

**Note:** Ensure that the VBScript that you will be using for DDE scripting satisfies the requirements listed in [Pre-Process Scripting Requirements on page 360](#). If the purpose of your VBScript is to manipulate keywords before Application Enabler sends them to OnBase, use Pre-Process scripting instead of DDE Pre-Process scripting.

---

Application Enabler can call VBScript functions to pre-process or parse DDE data before Application Enabler uses it. This allows for greater flexibility and customization of Application Enabler's DDE integration.

## DDE Scripting Requirements

The script file name must match the name of the application as it appears in the Enabled Applications list, and the aes file should be placed in the same directory as the Application Enabler executable file. There can only one aes file per application.

Application Enabler requires the following three functions for DDE scripting:

- GetScreenContents
- GetCursorRow
- GetCursorColumn

As the names of these functions indicate, each function receives DDE data and returns the screen contents (GetScreenContents), the row of the current cursor location (GetCursorRow), and the column of the current cursor location (GetCursorColumn).

## Example

An example of DDE scripting is where Application Enabler executes a VBScript after getting the contents of a Microsoft Word document. In this example, the name of the enabled application is **winword.exe**. Therefore, the name of the script file is **winword.exe.aes**.

The script file contains:

```
Function GetScreenContents(InputValue)
    'MsgBox InputValue
    GetScreenContents = InputValue
End Function

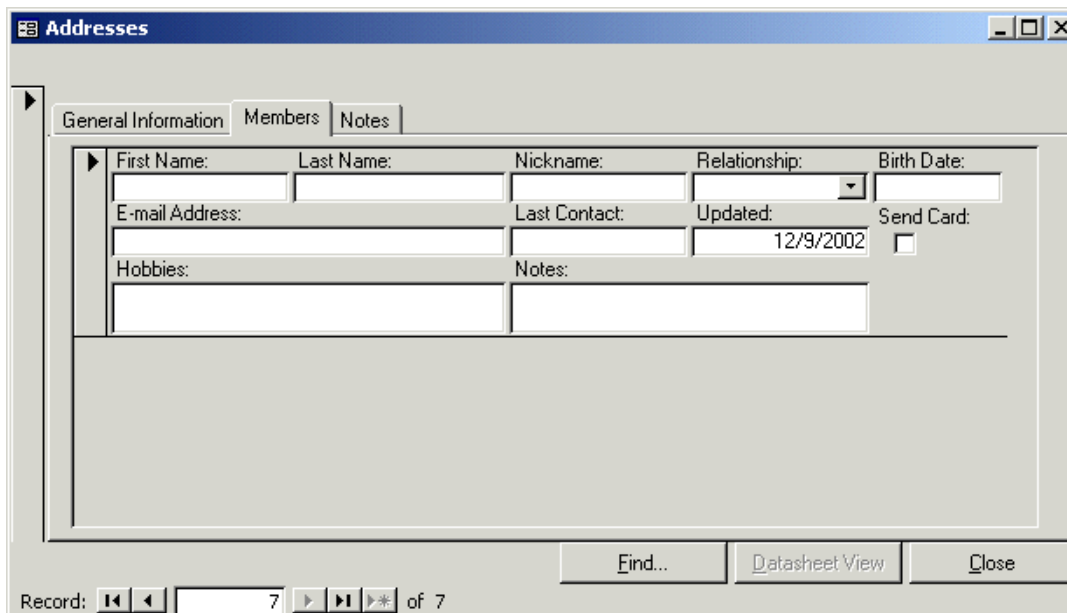
Function GetCursorRow(InputValue)
    'MsgBox InputValue
    GetCursorRow = 5
End Function

Function GetCursorColumn(InputValue)
    'MsgBox InputValue
    GetCursorColumn = 6
End Function
```

# NON-STANDARD CONFIGURATION

Some screens need to be identified using **Metrics** settings. **Metrics** settings use the position of elements on the screen for identification. This is useful when screens and their controls cannot easily be identified. The following instructions are an example of how to enable a Windows-based screen using non-standard methods.

1. In Application Enabler Configuration, click **New Win-Screen**.
2. Click the screen you want to enable. Some screens will not allow you to click on the whole screen. In these instances, you must click on, or enable, a control within the screen. In the example below, the entire **Members** tab cannot be selected, so you would select the **First Name** field:



3. Click **View Window Info Tree**.
4. Move up the tree until you find the control with the name of the screen you want to enable. To verify that it is the correct control, right-click on the control and select **Highlight**. Right-click on the proper control in the window tree and select **Use Selected Window**.
5. Click **Configure Mapping Rules**.
6. On the **Window ID** tab, clear the **Use window id when comparing against this window** check box.
7. On the **Metrics** tab, select the **Horizontal Location** and **Vertical Location** check boxes.
8. Click **OK**.

The controls on the screen are set to be identified by the location on the screen using horizontal and vertical coordinates. In some instances, you may want only to identify controls by the horizontal location or the vertical location.

As with standard configurations, you must configure the keyword associations. For further information, see [Enabling Windows Applications on page 87](#).

After completing the configuration process and returning to the **AEConfig** dialog box:

1. Click **Configure**.
2. On the **General** tab, select **Use tabbing for scraping keywords**.
3. Click **OK**.

The **Use tabbing for scraping keywords** check box is used with applications like Microsoft Access. This type of application has a single floating active control; therefore, this is the only control that can be uniquely identified by Application Enabler. Application Enabler uses the tab order and the floating control to navigate to each keyword location. It grabs the value and moves to the next control in the tab order until all keyword locations have been tabbed to. At that point, Application Enabler knows what value you clicked on and will return the documents for that screen based on the value specified.

The following table shows the hexadecimal values and mouse or keyboard equivalents for the virtual-key codes used by OnBase.

The codes are listed in numeric order.

Hexadecimal Value	Mouse or keyboard equivalent
01	Left mouse button
02	Right mouse button
03	Control-break processing
04	Middle mouse button (three-button mouse)
05	X1 mouse button
06	X2 mouse button
07	Undefined
08	BACKSPACE key
09	TAB key
0A–0B	Reserved
0C	CLEAR key
0D	ENTER key
0E–0F	Undefined
10	SHIFT key
11	CTRL key
12	ALT key
13	PAUSE key
14	CAPS LOCK key
15	IME Kana mode
15	IME Hangul mode (maintained for compatibility; use VK_HANGUL)
15	IME Hangul mode

Hexadecimal Value	Mouse or keyboard equivalent
16	Undefined
17	IME Junja mode
18	IME final mode
19	IME Hanja mode
19	IME Kanji mode
1A	Undefined
1B	ESC key
1C	IME convert
1D	IME nonconvert
1E	IME accept
1F	IME mode change request
20	SPACEBAR
21	PAGE UP key
22	PAGE DOWN key
23	END key
24	HOME key
25	LEFT ARROW key
26	UP ARROW key
27	RIGHT ARROW key
28	DOWN ARROW key
29	SELECT key
2A	PRINT key
2B	EXECUTE key
2C	PRINT SCREEN key
2D	INS key
2E	DEL key
2F	HELP key

Hexadecimal Value	Mouse or keyboard equivalent
30	0 key
31	1 key
32	2 key
33	3 key
34	4 key
35	5 key
36	6 key
37	7 key
38	8 key
39	9 key
3A–40	Undefined
41	A key
42	B key
43	C key
44	D key
45	E key
46	F key
47	G key
48	H key
49	I key
4A	J key
4B	K key
4C	L key
4D	M key
4E	N key
4F	O key
50	P key



Hexadecimal Value	Mouse or keyboard equivalent
51	Q key
52	R key
53	S key
54	T key
55	U key
56	V key
57	W key
58	X key
59	Y key
5A	Z key
5B	Left Windows key (Microsoft® Natural® keyboard)
5C	Right Windows key (Natural keyboard)
5D	Applications key (Natural keyboard)
5E	Reserved
5F	Computer Sleep key
60	Numeric keypad 0 key
61	Numeric keypad 1 key
62	Numeric keypad 2 key
63	Numeric keypad 3 key
64	Numeric keypad 4 key
65	Numeric keypad 5 key
66	Numeric keypad 6 key
67	Numeric keypad 7 key
68	Numeric keypad 8 key
69	Numeric keypad 9 key
6A	Multiply key
6B	Add key

Hexadecimal Value	Mouse or keyboard equivalent
6C	Separator key
6D	Subtract key
6E	Decimal key
6F	Divide key
70	F1 key
71	F2 key
72	F3 key
73	F4 key
74	F5 key
75	F6 key
76	F7 key
77	F8 key
78	F9 key
79	F10 key
7A	F11 key
7B	F12 key
7C	F13 key
7D	F14 key
7E	F15 key
7F	F16 key
80H	F17 key
81H	F18 key
82H	F19 key
83H	F20 key
84H	F21 key
85H	F22 key
86H	F23 key

Hexadecimal Value	Mouse or keyboard equivalent
<b>87H</b>	F24 key
<b>88–8F</b>	Unassigned
<b>90</b>	NUM LOCK key
<b>91</b>	SCROLL LOCK key
<b>92–96</b>	OEM specific
<b>97–9F</b>	Unassigned
<b>A0</b>	Left SHIFT key
<b>A1</b>	Right SHIFT key
<b>A2</b>	Left CONTROL key
<b>A3</b>	Right CONTROL key
<b>A4</b>	Left MENU key
<b>A5</b>	Right MENU key
<b>A6</b>	Browser Back key
<b>A7</b>	Browser Forward key
<b>A8</b>	Browser Refresh key
<b>A9</b>	Browser Stop key
<b>AA</b>	Browser Search key
<b>AB</b>	Browser Favorites key
<b>AC</b>	Browser Start and Home key
<b>AD</b>	Volume Mute key
<b>AE</b>	Volume Down key
<b>AF</b>	Volume Up key
<b>B0</b>	Next Track key
<b>B1</b>	Previous Track key
<b>B2</b>	Stop Media key
<b>B3</b>	Play/Pause Media key
<b>B4</b>	Start Mail key

Hexadecimal Value	Mouse or keyboard equivalent
<b>B5</b>	Select Media key
<b>B6</b>	Start Application 1 key
<b>B7</b>	Start Application 2 key
<b>B8-B9</b>	Reserved
<b>BA</b>	Used for miscellaneous characters; it can vary by keyboard. For the US standard keyboard, the ':' key
<b>BB</b>	For any country/region, the '+' key
<b>BC</b>	For any country/region, the ',' key
<b>BD</b>	For any country/region, the '-' key
<b>BE</b>	For any country/region, the '.' key
<b>BF</b>	Used for miscellaneous characters; it can vary by keyboard. For the US standard keyboard, the '/' key
<b>C0</b>	Used for miscellaneous characters; it can vary by keyboard. For the US standard keyboard, the '~' key
<b>C1-D7</b>	Reserved
<b>D8-DA</b>	Unassigned
<b>DB</b>	Used for miscellaneous characters; it can vary by keyboard. For the US standard keyboard, the '[' key
<b>DC</b>	Used for miscellaneous characters; it can vary by keyboard. For the US standard keyboard, the '\' key
<b>DD</b>	Used for miscellaneous characters; it can vary by keyboard. For the US standard keyboard, the ']' key
<b>DE</b>	Used for miscellaneous characters; it can vary by keyboard. For the US standard keyboard, the 'single-quote/double-quote' key
<b>DF</b>	Used for miscellaneous characters; it can vary by keyboard.
<b>E0</b>	Reserved
<b>E1</b>	OEM specific
<b>E2</b>	Either the angle bracket key or the backslash key on the RT 102-key keyboard
<b>E3-E4</b>	OEM specific

Hexadecimal Value	Mouse or keyboard equivalent
E5	IME PROCESS key
E6	OEM specific
E7	Used to pass Unicode characters as if they were keystrokes. The VK_PACKET key is the low word of a 32-bit Virtual Key value used for non-keyboard input methods.
E8	Unassigned
E9–F5	OEM specific
F6	Attn key
F7	CrSel key
F8	ExSel key
F9	Erase EOF key
FA	Play key
FB	Zoom key
FC	Reserved for future use
FD	PA1 key
FE	Clear key



# **Application Enabler**

## **User Guide**

## Definitions

The following terms are associated with Application Enabler, and are used throughout this documentation:

Term	Definition
<b>Context</b>	The OnBase client and the action that will be taken in the given client when the configured mouse event or keyboard event is triggered. In other words, a context is added to a scrape event, based off the configured mouse/ keyboard event, and then sent to a listener. For example, The OnBase Client - Retrieve Documents context will retrieve documents in the OnBase Client.
<b>Hotspot</b>	The area of the screen where a keyboard or mouse event is performed, which executes a context. For example, a user double-clicks (mouse event) on a form field labeled 'Invoice' (hotspot) to retrieve an invoice from OnBase (context: Application Enabler - Retrieve Documents).
<b>Keyboard Event</b>	The keystroke that triggers a scrape event. For example, Shift + F5.
<b>Listener</b>	The OnBase module that receives and processes an Application Enabler scrape event.
<b>Mouse Event</b>	The mouse action that triggers a scrape event. For example, left double-click.
<b>Scrape</b>	The process that Application Enabler uses to obtain values from the line-of-business application screen. Also referred to as "screen scrape" or "screen scraping."
<b>Scrape Event</b>	The message sent by Application Enabler to other modules. This message includes information scraped from a line-of-business application and configuration information.

## General

Application Enabler allows users to retrieve content stored in the OnBase database by performing a keyboard or mouse event on a line-of-business application field that contains a Keyword Value. The keyboard or mouse event that triggers the search is determined during configuration.

Using Application Enabler's native viewer is similar to using the Unity Client. For this reason, similar functionality is not discussed in this documentation. The Unity Client help file is available when using Application Enabler. Exclusive Application Enabler functionality, as well as differences in functionality when using Application Enabler instead of the Unity Client, are outlined in this chapter.

## Working with Application Enabler

Application Enabler starts automatically when you start your workstation.

An icon is displayed in the system tray.




You can double-click this icon to open the Application Enabler toolbar. If you are licensed for the Unity Client, double-clicking this icon opens the Unity Client.

You can also right-click and select from the following options:

Option	Submenu	Description
<b>Application Enabler</b>	<b>Load Configuration</b>	Select to open an Application Enabler configuration file. Depending on settings configured in the configuration file, Application Enabler Live may launch automatically after the configuration file is loaded.
	<b>Reload Configuration</b>	Select to reload the current Application Enabler configuration file. Any changes made to the configuration file will be reflected in Application Enabler after reloading. Depending on settings configured in the configuration file, Application Enabler Live may launch automatically after the configuration file is loaded.
	<b>Live Retrieval</b>	Select to start Application Enabler Live. For more information on Application Enabler Live, see <a href="#">Using Application Enabler Live on page 424</a> .
	<b>Discovery Mode</b>	Select to run Application Enabler in Discovery Mode. For more information on Discovery Mode, see <a href="#">Using Discovery Mode on page 379</a> .
	<b>Demo Mode</b>	Select to run Application Enabler in Demo Mode. For more information on Demo Mode, see <a href="#">Using Demo Mode on page 380</a> .



Option	Submenu	Description
	<b>Settings</b>	Select to edit Application Enabler settings and options. For more information on settings, see <a href="#">Application Enabler Settings on page 386</a> .
	<b>Date Range</b>	Select to set the date range used for performing document retrieval using Application Enabler. For more information on date ranges, see <a href="#">Date Range on page 389</a> .
	<b>Memorized Keywords</b>	Select to view, edit, and clear Memorized Keywords. For more information on Memorized Keywords, see <a href="#">Memorized Keywords on page 391</a> .
	<b>Launch Toolbar</b>	Select to launch the Application Enabler toolbar:   The Application Enabler toolbar gives you access to the Application Enabler options described above. It also includes the <b>About Application Enabler</b> button. Click this button to display version information for Application Enabler in the <b>About</b> window.
<b>Launch Unity Client</b>		Select to open the Unity Client window.  <hr/> <b>Note:</b> This option is only available when licensed for the Unity Client. <hr/>
<b>Log Out</b>		Select to log out of OnBase and close the Application Enabler viewer.
<b>Exit OnBase</b>		Select to log out of OnBase and close the Unity Client.

## Opening and Using an Existing Configuration

Your system administrator may have configured Application Enabler to load the correct configuration automatically. Otherwise, you will be prompted to load a configuration file after starting Application Enabler.

You can also open an Application Enabler configuration file by clicking the **Load Configuration** button on the Application Enabler toolbar, or right-clicking the system tray icon and selecting **Load Configuration**. Navigate to the configuration file, select it, and click **Open**.

## Keyword Validation

When keywords are scraped from a line-of-business application, the following Keyword Types are validated:

- Date
- Numeric 9
- Numeric 20
- Currency
- Floating Point

If the value scraped does not match the Keyword Type's specification, an error message will display. Scraped Keyword Values are case sensitive.

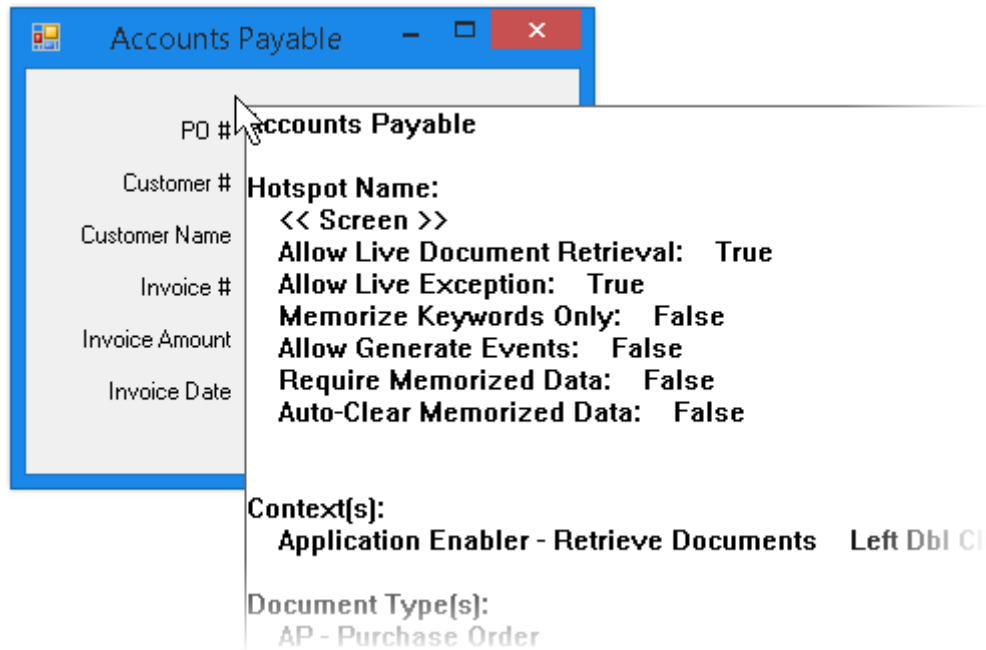
## Using Discovery Mode

Discovery Mode helps access configuration information from the line-of-business application screen quickly and easily. This option is available for Smart-Screen, Windows, HTML, Java, and Dynamics GP-based applications. Discovery Mode does not support text-based screens, applications using tabbing, or screens configured for OCR.

To use Discovery Mode:

1. Open the line-of-business application.
2. Open the Application Enabler executable and open the appropriate configuration file.

3. Right-click the system tray icon and select **Discovery Mode**, or click the **Discovery Mode** button from the Application Enabler toolbar.
4. Place your cursor over the enabled application. A box will display showing configuration information, such as the screen name of the enabled application, the hotspot name that is hovered over, configured Document Types, configured keyword mappings, and keyboard and mouse events. See the following example:



To turn off Discovery Mode, right-click the system tray icon and select **Discovery Mode**, or click the **Discovery Mode** button from the Application Enabler toolbar.

When using Discovery Mode:

- You can still execute context events and run Application Enabler in Demo Mode or in Application Enabler Live.
- If the **Application Enabler - Run Script** context is used, the script name will be displayed next to the context name in the box displaying configuration information.
- If preprocess scripts are configured, they will run.
- The box displaying configuration information may be slow to render with certain Smart-Screen applications (for example, Silverlight).

## Using Demo Mode

When Application Enabler runs in Demo Mode, a summary of the scraped information is displayed when an event is triggered. Demo Mode allows for troubleshooting and testing Application Enabler without the need to connect to a data source. When enabled, scrape events are not executed.

To run Application Enabler in Demo Mode:

1. Right-click the system tray icon and select **Application Enabler | Demo Mode**, or click the **Demo Mode** icon on the Application Enabler toolbar.
2. Use Application Enabler to trigger a context event. For example, double-click on the screen as if to retrieve a document.
3. Instead of a context event occurring, the window, configured Screen Identification Elements or Page Identification Elements, and hotspots are each highlighted individually in the line-of-business window. Next, the **Scrape Event** window is displayed.

**Note:** When using Demo mode on an HTML page containing frames, highlights will not display properly, although the correct keyword information will be scraped and displayed in the **Scrape Event** window.

**Note:** Highlights will not occur when either Discovery Mode or Application Enabler Live is enabled.

Show/Hide AE URI areas

**Event Info**

Type	Name
Screen	Accounts Payable
Hotspot	<< Screen >>
Allow Live Document Retrieval	True
Allow Live Exceptions	True

**Context(s)**

Name
Application Enabler - Retrieve Documents

**Document Type(s)**

ID	Name
119	AP - Purchase Order

**Retrieval Keyword(s)**

ID	Name	Value
241	PO #	PO #

**All Keyword(s)**

ID	Name	Value
241	PO #	PO #

4. The following information is displayed in the **Scrape Event** window:

Event Info	Description
<b>Type</b>	The type of event. For example, <b>Screen</b> or <b>Hotspot</b> .
<b>Name</b>	The name of event. For example, <<Screen>>.

Context(s)	Description
<b>Name</b>	The name of the Application Enabler context that was triggered.

Document Type(s)	Description
<b>ID</b>	The Document Type's numeric ID.
<b>Name</b>	The Document Type's name.

Custom Queries	Description
<b>ID</b>	The Custom Query's numeric ID.
<b>Name</b>	The Custom Query's name.

Folder(s)	Description
<b>ID</b>	The Folder's numeric ID.
<b>Name</b>	The Folder's name.

Workflow Lifecycle(s)	Description
<b>ID</b>	The Workflow Lifecycle's numeric ID.
<b>Name</b>	The Workflow Lifecycle's name.

Workflow Queue(s)	Description
<b>ID</b>	The Workflow Queue's numeric ID.

Workflow Queue(s)	Description
Name	The Workflow Queue's name.

<b>E-Form(s)</b>	<b>Description</b>
<b>ID</b>	The E-Form's numeric ID.
<b>Name</b>	The E-Form's name.

<b>Document Composition Template(s)</b>	<b>Description</b>
<b>ID</b>	The Document Composition Template's numeric ID.
<b>Name</b>	The Document Composition Template's name.

<b>WorkView Application(s)</b>	<b>Description</b>
<b>ID</b>	The WorkView Application's numeric ID.
<b>Name</b>	The WorkView Application's name.

<b>WorkView Class(es)</b>	<b>Description</b>
<b>ID</b>	The numeric ID belonging to the WorkView Class.
<b>Name</b>	The name of the WorkView Class.

<b>WorkView Filter(s)</b>	<b>Description</b>
<b>ID</b>	The WorkView Filter's numeric ID.
<b>Name</b>	The WorkView Filter's name.

<b>Retrieval Keyword(s)</b>	<b>Description</b>
<b>ID</b>	The retrieval Keyword Type's numeric ID.
<b>Name</b>	The retrieval Keyword Type's name.
<b>Value</b>	The retrieval Keyword Value.

Extended Keyword(s)	Description
<b>ID</b>	The Extended Keyword Type's numeric ID.
<b>Name</b>	The Extended Keyword Type's name.
<b>Value</b>	The Extended Keyword Value.

---

**Note:** Extended Keywords are keywords configured for use with government modules, healthcare modules, or the OnBase Document Handle.

---

WorkView Attribute(s)	Description
<b>ID</b>	The WorkView attribute's numeric ID.
<b>Name</b>	The WorkView attribute's name.
<b>Value</b>	The WorkView attribute's value.

Unity Form(s)	Description
<b>ID</b>	The Unity Form's numeric ID.
<b>Name</b>	The Unity Form's name.
<b>Revision Number</b>	The Unity Form's revision number.

Unity Form Field(s)	Description
<b>ID</b>	The Unity Form field's numeric ID.
<b>Name</b>	The Unity Form field's name.
<b>Value</b>	The Unity Form field's value.

All Keyword(s)	Description
<b>ID</b>	The Keyword Type's numeric ID.
<b>Name</b>	The Keyword Type's name.
<b>Value</b>	The Keyword Value.



## Using OCR

---

**Note:** Application Enabler Local OCR engine functionality cannot be used when **ClearType** is selected from the **Use the following method to smooth edges of screen fonts** drop-down list in Windows display settings, unless the **Enable ClearType Compatibility Mode** option is selected. For this reason, unless the **Enable ClearType Compatibility Mode** option is selected, whenever you use Application Enabler OCR functionality, Application Enabler automatically disables this setting. Application Enabler does not re-enable this setting. For information on enabling this setting, see the Windows help files.

---

---

**Note:** In some user environments, Windows display scaling settings can impact OCR performance for legacy line-of-business applications. Legacy applications may not be "DPI-aware," which means they are not automatically scaled in size to accommodate higher resolution displays. In some cases when these legacy applications are rendered on modern hardware and displays, text can be distorted or blurred, possibly resulting in unexpected results from OCR. Information on how to change these settings, as well as more technical information about DPI scaling, can be found here: [https://msdn.microsoft.com/en-us/library/dn469266\(v=vs.85\).aspx](https://msdn.microsoft.com/en-us/library/dn469266(v=vs.85).aspx)

---

In some configurations, OCR is available for text-based screens. To use OCR:

1. Open the line-of-business application.
2. Enter the Keyword Value(s) in the line-of-business application and double-click (or perform the configured screen event) on the line-of-business application.

---

**Caution:** If the cursor is in the keyword field, or if characters in the keyword field are selected, the OCR process will not function correctly. Remove the cursor from the keyword field in the line-of-business application before performing the configured screen event.

---

---

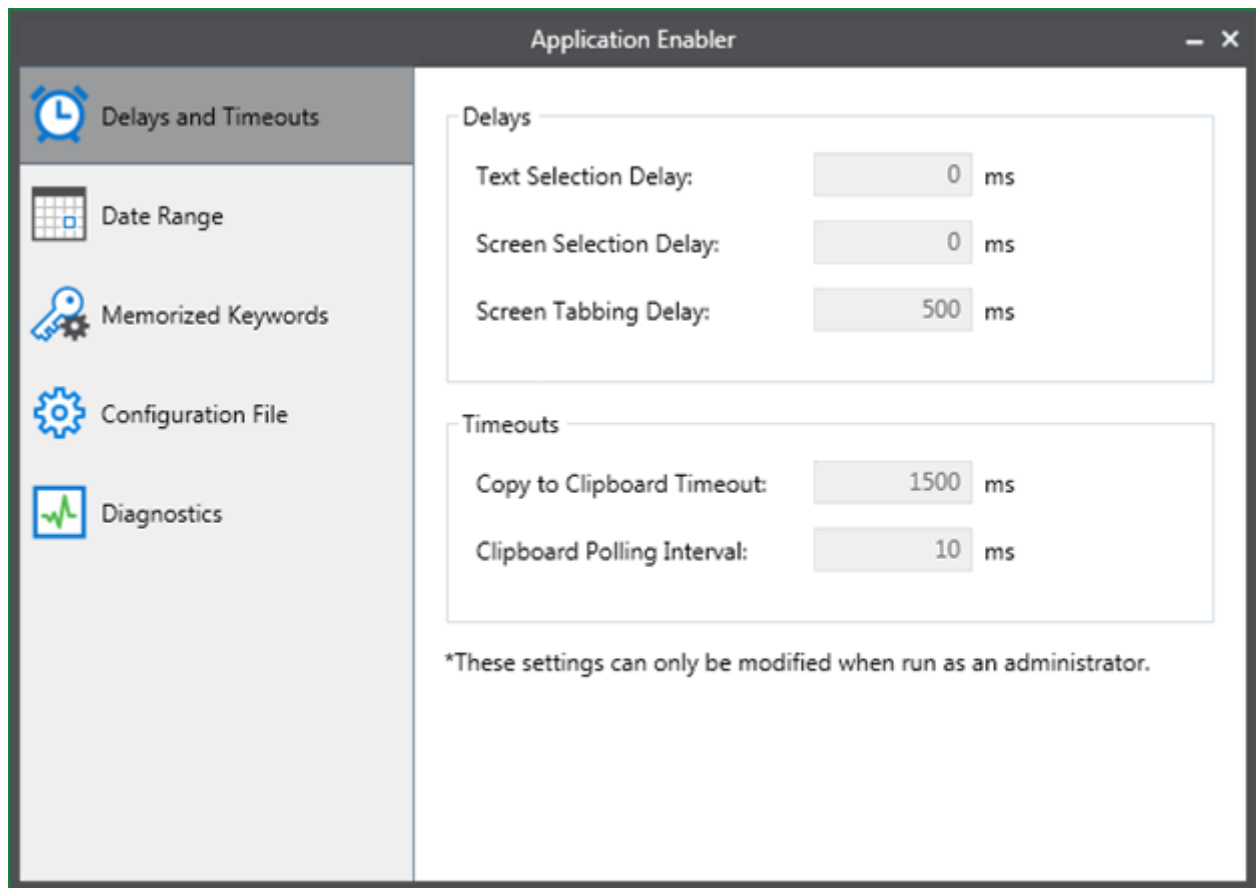
**Caution:** When using OCR functionality, the screen where OCR will be used must be in the foreground (i.e., no other open windows or applications can be covering the screen being scraped). If the screen is not in the foreground, then the OCR process can yield unexpected results.

---

## Application Enabler Settings

The pages in the Application Enabler Settings window are described in the following subsections.

## Delays and Timeouts



The **Delays and Timeouts** page allows you to set timeout settings for text screens that use the Windows clipboard. All settings are measured in milliseconds.

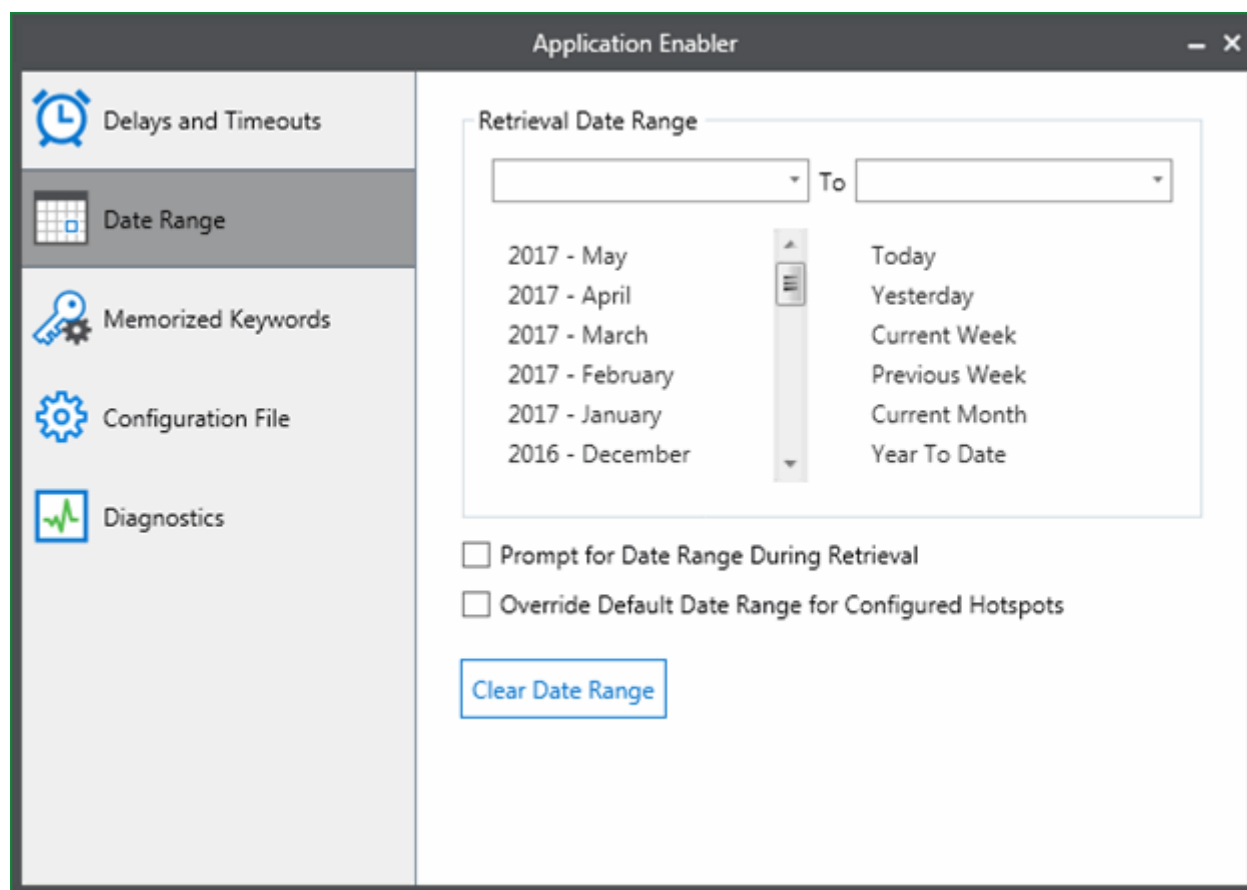
**Note:** The settings on the **Delays and Timeouts** page can only be modified when running the application as an administrator.

The following settings are available:

Delays	Description
<b>Text Selection Delay</b>	Time needed by the line-of-business application to process text selection.
<b>Screen Selection Delay</b>	Time needed by the line-of-business application to process screen selection.
<b>Screen Tabbing Delay</b>	Timeout for Application Enabler to watch for changes when using the Tab key to move between fields.

Timeouts	Description
<b>Copy to Clipboard Timeout</b>	Timeout for Application Enabler to watch for changes after sending a copy to clipboard command.
<b>Clipboard Polling Interval</b>	Time before Application Enabler tries to retrieve the information from the clipboard and will repeat until Copy to Clipboard times out.

## Date Range



You can specify a date range for Application Enabler retrieval by specifying dates in **Retrieval Date Range**. You can also select a range of months, a specific month, today, yesterday, the current week, the previous week, the current month, or the year to date. To clear the specified date range, click **Clear Date Range**.

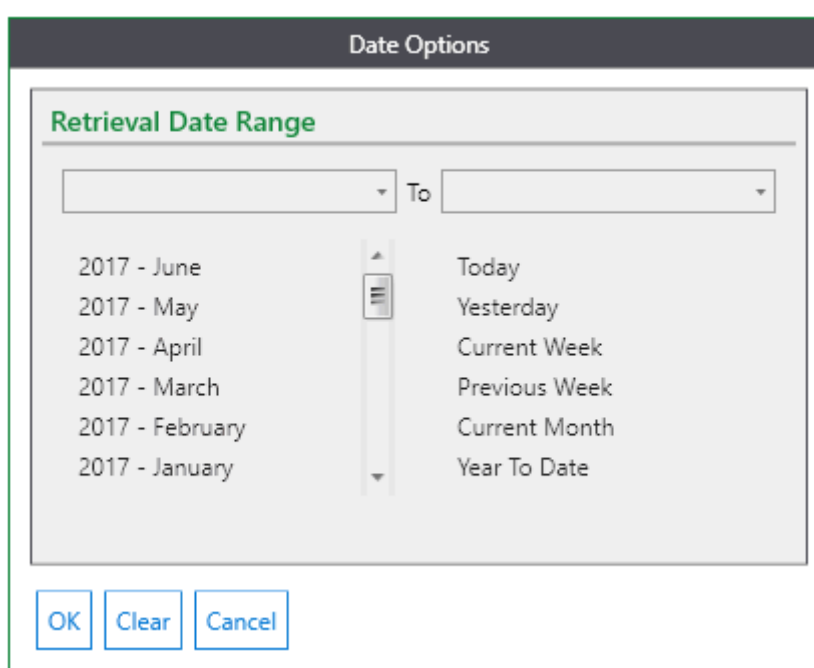
The following settings are also available:

Setting	Description
<b>Prompt for Date Range During Retrieval</b>	When performing a document retrieval, you will be prompted to manually specify a retrieval date range.  <b>Note:</b> When this option is selected, the date options will still display during indexing.

Setting	Description
<b>Override Default Date Range for Configured Hotspots</b>	<p>When performing a document retrieval using hotspots, the date range specified above, on the <b>Date Range</b> page, will override the default date range configured for the hotspot.</p> <hr/> <p><b>Note:</b> This option must be selected in order to use the date range specified on the <b>Date Range</b> page.</p> <hr/>

## Using Retrieval Date Options

Depending on your configuration, the **Date Options** dialog box may be displayed after triggering an event.

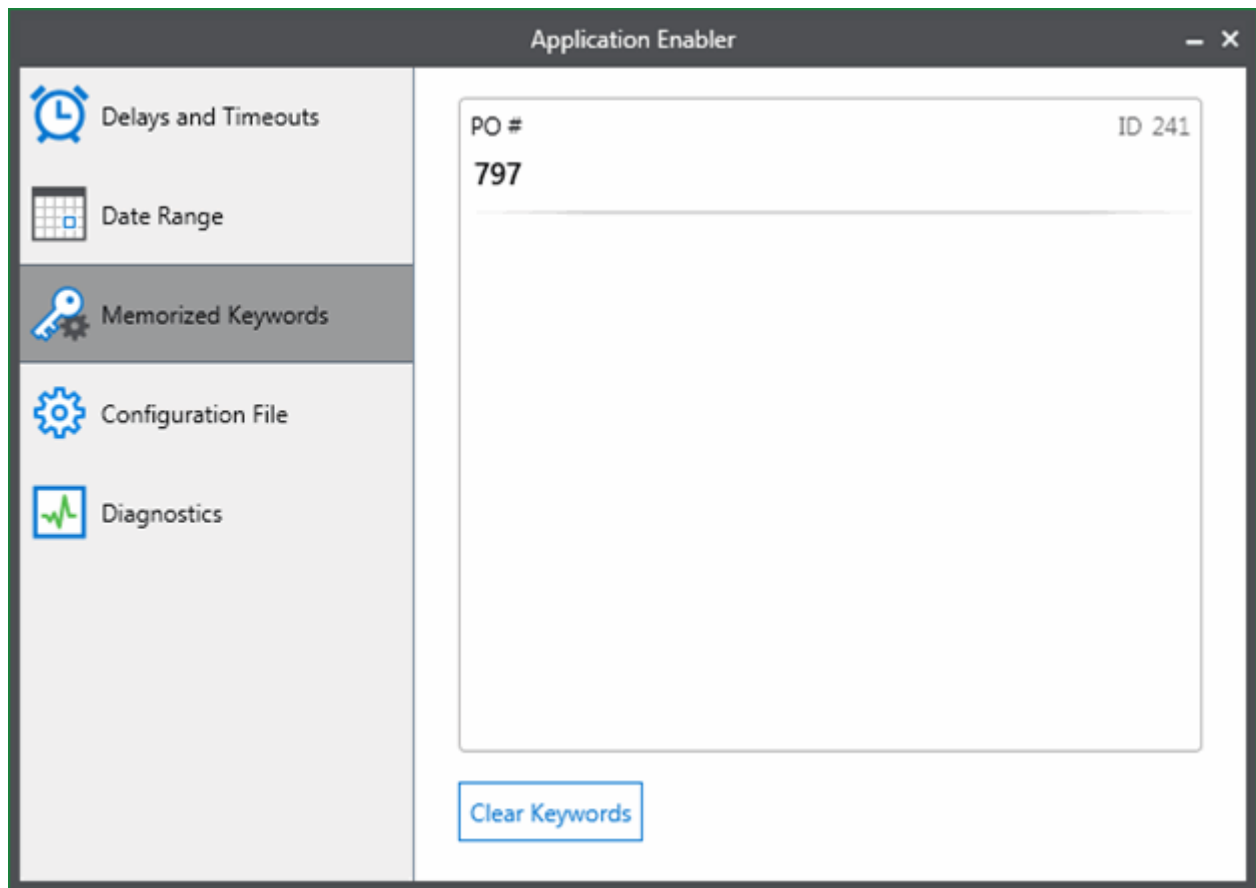


The image shows a 'Date Options' dialog box. Inside, there is a section titled 'Retrieval Date Range'. It features two dropdown menus separated by the word 'To'. Below the first dropdown is a list of months for the year 2017, from June down to January. To the right of this list is a vertical scrollbar. To the right of the second dropdown is a list of time-based options: Today, Yesterday, Current Week, Previous Week, Current Month, and Year To Date. At the bottom of the dialog box are three buttons: 'OK', 'Clear', and 'Cancel'.

Specify a date range and click **OK**. To clear a date range, click **Clear**.

If you want to cancel the input event, click **Cancel**.

## Memorized Keywords



The **Memorized Keywords** page displays all memorized Keyword Values, Unity Form Fields, and WorkView attributes. This page also displays the Keyword Value or WorkView attribute's unique ID. An ID of 0 is displayed for memorized Unity Form Fields. This is because Unity Form Fields do not include ID attributes.

To edit the memorized value, click on the memorized value and modify the value.

To clear memorized values, click **Clear Keywords**.

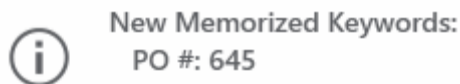
---

**Note:** You can also view memorized Keyword Values using Discovery Mode.

---

## Memorizing Keyword Values, Unity Form Fields, or WorkView Attributes

Depending on your configuration, it may be possible for you to memorize Keyword Values, Unity Form Fields, or WorkView attributes before completing an Application Enabler task. When memorization occurs, a **New Memorized Keywords: [Keyword Type/Unity Form Field/ (WorkView Application) - (WorkView Class) - WorkView Filter]: [Value]** message is displayed near the system tray when scraping from a screen:



If multiple values are memorized, this message includes separate entries for value.

---

**Note:** If you are memorizing in Application Enabler Live, a **New Memorized Keywords** message is only displayed when you memorize a new Keyword Value, Unity Form Field, or WorkView attribute. A **New Memorized Keywords** message is not displayed when you memorize the same Keyword Value, Unity Form Field, or WorkView attribute.

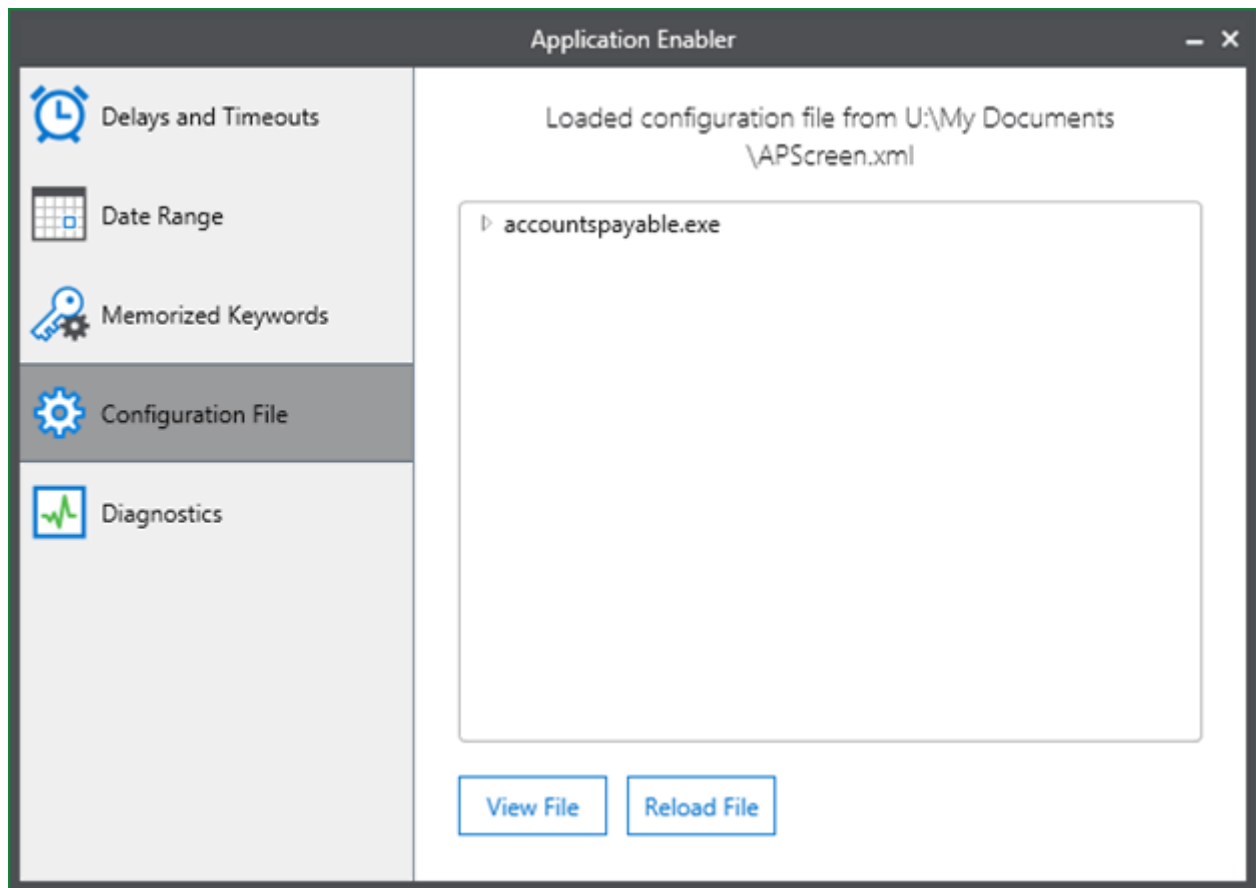
---

When an event is triggered, the memorized values are used to complete the configured Application Enabler task. For example, if the task is to retrieve documents and you have memorized Keyword Values, the documents returned must have all of the scraped Keyword Values, using the Document Type information scraped from the last scrape event.

Memorized keywords:

- Persist after a scrape event is triggered. This means that after a scrape event is triggered, the memorized keywords can still be used on subsequent events.
- Are replaced instead of appended. If a keyword is memorized, and the same Keyword Type is scraped again, the memorized Keyword Value will be replaced with the newly scraped Keyword Value.  
If the same Keyword Type exists within the hotspot triggering the scrape event and in the memorized cache, the Keyword Value scraped from the hotspot is used. If the hotspot triggering the scrape event is not a memorizing hotspot, the Keyword Value is not updated in the memorized cache.
- Are appended to all Application Enabler contexts. There is no specific Application Enabler context that must be used to memorize keywords.

## Configuration File



The **Configuration File** page displays information about the configuration file that is currently loaded.

---

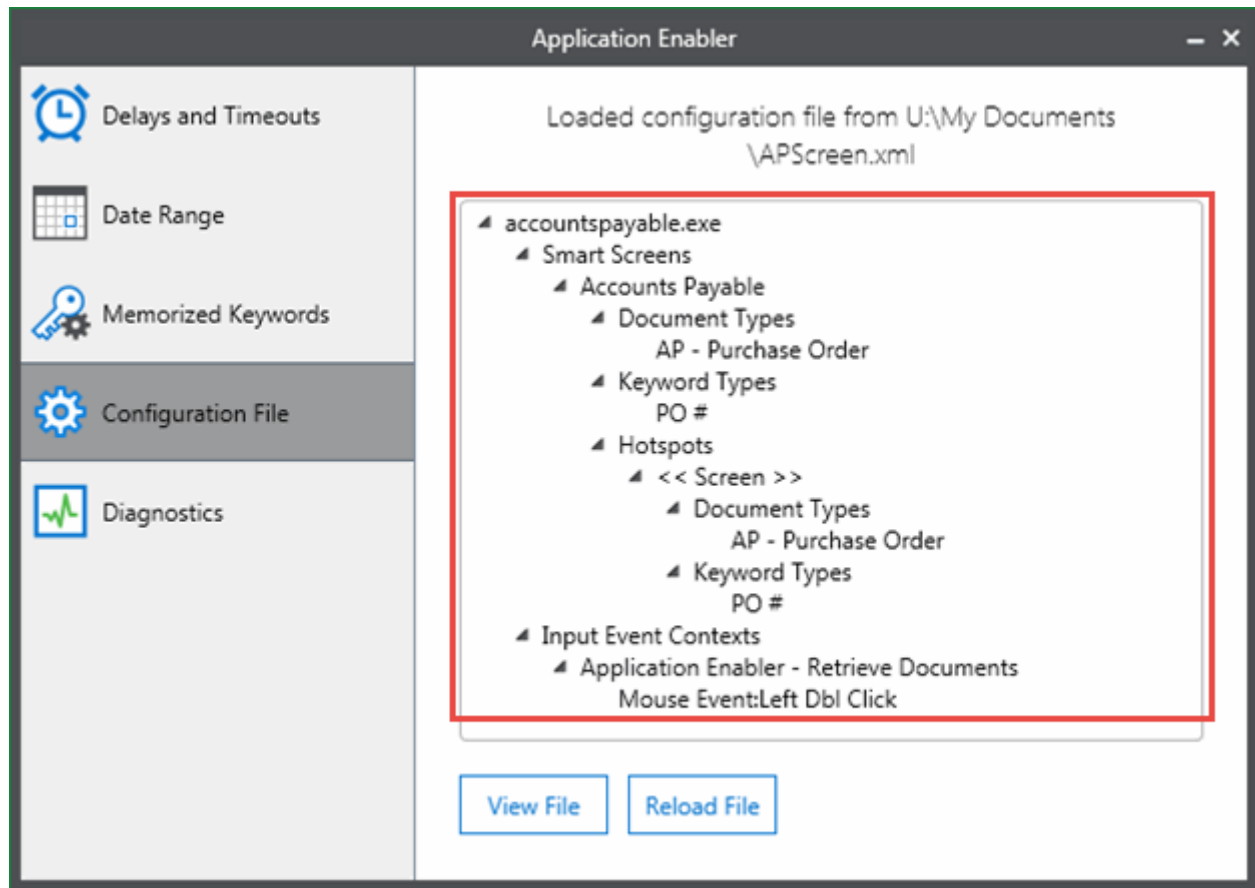
**Note:** This page may not be available based on your system configuration.

---

An expandable list displays a graphical view of your configuration, including information pertaining to Document Types, Keyword Types, hotspots, mouse/keyboard events, and contexts.



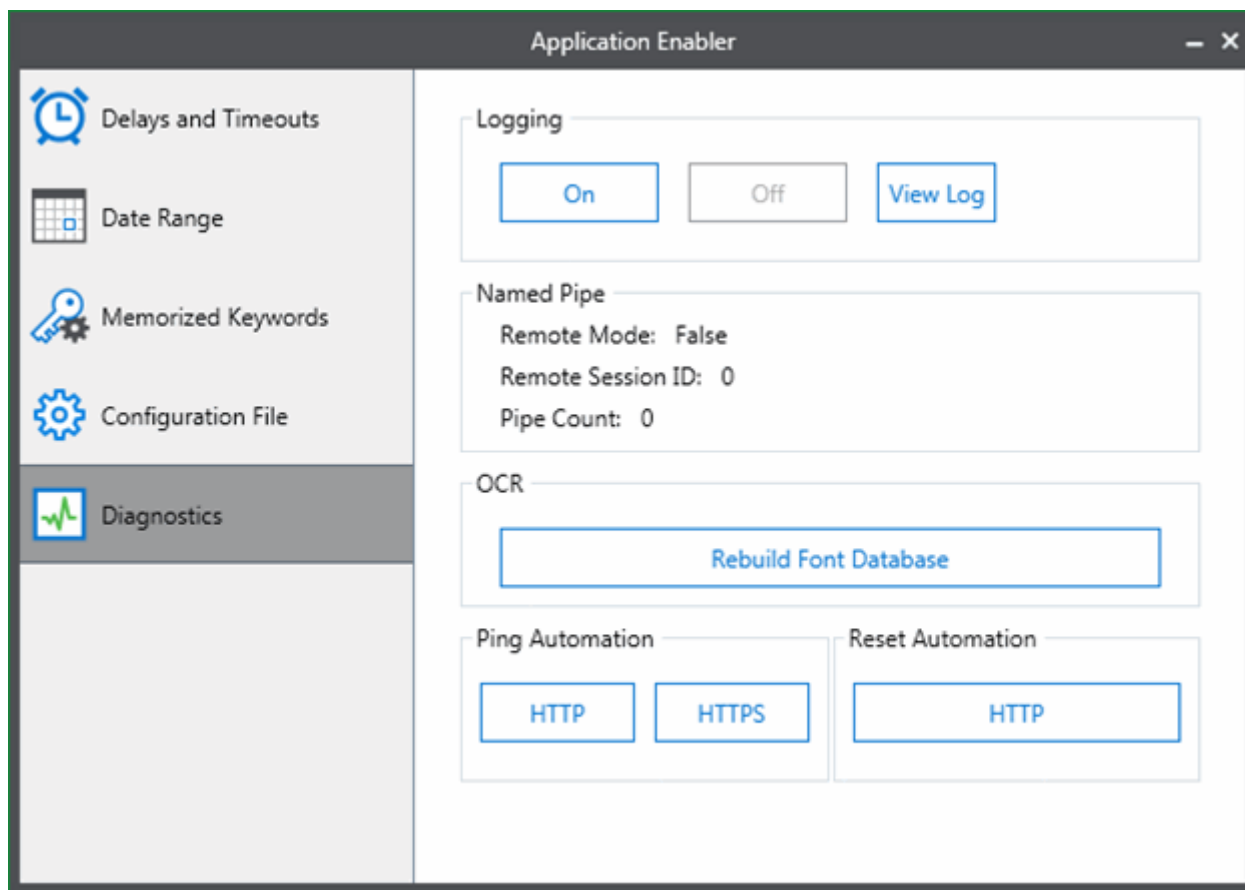
For example:



The following buttons are available on the **Configuration File** page:

Configuration File	Description
<b>View File</b>	Click to open the configuration file.
<b>Reload File</b>	Click to reload the configuration file.

## Diagnostics



The **Diagnostics** page is used for troubleshooting.

In the **Logging** portion of the screen, enable logging by clicking **On**. Turn logging off by clicking **Off**. You can view the diagnostic log (**AEVerbose.txt**) by clicking **View Log**. This file also contains OCR result information.

---

**Caution:** Each time you enable logging, the previous log file is overwritten in the workstation's TEMP directory (defined in the workstation's Environment Variables). To retain previous log files, open them and save them with a different file name.

---

---

**Tip:** Since logging can impact performance, only enable it when necessary.

---

The **Named Pipe** portion of the screen displays the following:

Named Pipe	Description
<b>Remote Mode</b>	When <b>true</b> , Application Enabler is running in a Remote Desktop environment. When <b>false</b> , Application Enabler is not running in a Remote Desktop environment.
<b>Remote Session ID</b>	The unique session identifier associated with the user when running in a Remote Desktop environment.
<b>Pipe Count</b>	The current number of clients being serviced by the named pipe server.

In the **OCR** portion of this screen, click **Rebuild Font Database** to rebuild the OCR font database, which the OCR engine requires to do OCR parsing. Once the font database is built, a file named **OCRSDK.pat** is generated in the %TMP% folder. %TMP% refers to the path specified by the TMP environment variable in Windows. The font database should be rebuilt each time users install new fonts on their workstations. For information about adding missing fonts, see [OCR Issues on page 26](#).

In the **Ping Automation** portion of this screen, click **HTTP** to check the status of the HTTP Listener and verify it is functioning and ready to receive information. Click **HTTPS** to check the status of the HTTPS Listener and verify it is functioning and ready to receive information. If either the HTTP Listener or the HTTPS Listener become unresponsive, you can click **HTTP** in the **Reset Automation** section to reset them and restore functionality.

## Using Contexts

### Application Enabler Contexts

Application Enabler contexts are executed using the native Application Enabler viewer.

---

**Note:** Application Enabler does not respect the Unity Client's **Automatically open if search returns a single result** user option. When a single result is returned, it is always displayed in a new window.

---

### Compose Document

Application Enabler allows you to compose documents directly from the line-of-business application, using a Document Composition template.

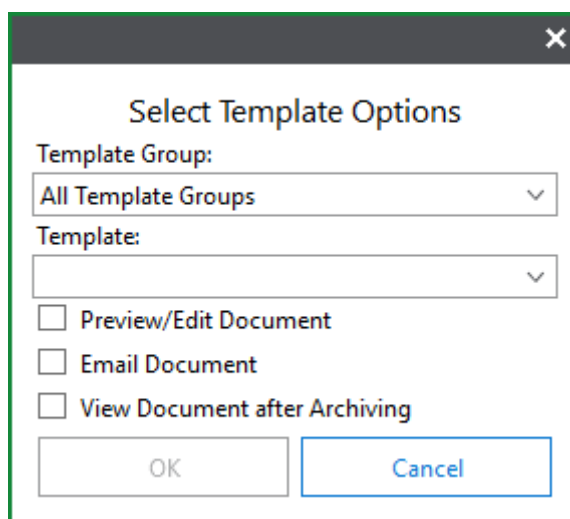
To compose documents using a Document Composition template:

1. Navigate to a screen in the line-of-business application containing data that you will use to compose a document.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.

3. If you are not already logged on to OnBase, you are prompted to do so.
4. If you are not prompted by the **Select Template Options** dialog box, you have completed document creation. Depending on your configuration, the newly composed document may be displayed.

Proceed to the next step if you are prompted by the **Select Template Options** dialog box:

5. The **Select Template Options** dialog box is displayed:



6. 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.
7. 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.
8. 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
<b>Preview/Edit Document</b>	<p>Select to view and/or edit the document before importing it into OnBase.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/>

Option	Description
<b>Email Document</b>	<p>Select to create an email notification after the document has been created and archived in OnBase.</p> <p>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.</p> <hr/> <p><b>Note:</b> The <b>Email Document</b> check box is only available to users that are able to send External Mail in OnBase.</p> <hr/>
<b>View Document after Archiving</b>	Select to view the document after it has been archived in OnBase.

9. Select **OK** to begin creating the document, or **Cancel** to exit.
10. 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**.
11. If **Preview/Edit Document** was not selected, skip to step 14.  
If **Preview/Edit Document** was selected, the document is displayed. Depending on your configuration, the template may be displayed as read-only.
12. Modify the document if necessary.

---

**Note:** If you modify Keyword Values Application Enabler 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.

---

13. Select from the following buttons on the **Document Composition** tab:

Button	Description
<b>Accept</b>	Saves the document.
<b>Redo</b>	Starts the document creation process over from the beginning.
<b>Cancel</b>	Discards the document.
<b>Print</b>	<p>Prints the document.</p> <hr/> <p><b>Note:</b> The <b>Print</b> button is only enabled for User Groups with <b>Print</b> privileges.</p> <hr/>

14. After clicking **Accept**, the **Import** dialog box is displayed:

The screenshot shows the 'Import' dialog box. It has a title bar with the text 'Import' and a close button (X). The dialog contains the following fields and controls:

- Document Type Group:** A dropdown menu with the selected value '<All>'.
- Document Type:** A dropdown menu that is currently empty.
- File Type:** A dropdown menu that is currently empty.
- Document Date:** A dropdown menu with the selected value '06/07/2017'.
- Keywords:** A section with a green checkmark icon and a delete icon (X in a box). The text 'Keywords' is displayed in green.
- Buttons:** At the bottom, there are two buttons: 'Import' (with a green up arrow icon) and 'Cancel' (with a red X icon).

The Keyword Values Application Enabler 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.

---

15. Click **Import**. The document is imported to OnBase.

16. If you selected **Email Document**, the **Email** dialog box is displayed:

The screenshot shows an 'Email' dialog box with a dark title bar and a close button. The dialog contains the following fields:

- Sender:** A text input field with a red asterisk indicating it is required.
- Recipients:** A text input field with a red asterisk indicating it is required.
- Subject:** A text input field.
- Body:** A large text area for the email content.

At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

17. Specify the following on the **Compose** tab:

Field	Description
<b>Sender</b>	Type the email address of the sender.
<b>Recipients</b>	Type the email address of the recipient. Separate multiple recipients with semi-colons.
<b>Subject</b>	Type the subject of the email.
<b>Body</b>	Type the body text of the email.

18. Click **OK** to email the document.

## Create New E-Form

Application Enabler allows you to create new E-Forms directly from the line-of-business application, eliminating the need to key index information into OnBase.

To create a new E-Form:

1. Navigate to a screen in the line-of-business application containing data that you will use to create a new E-Form.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. The form is submitted and created in OnBase.
4. Depending on your configuration, the form may be displayed. It includes the Keyword Value or Keyword Values from the line-of-business application.

5. Review the form and, if necessary, add any additional information.

## Create New Unity Form

Application Enabler allows you to create forms directly from the line-of-business application, using a Unity Forms template.

To create a new Unity Form:

1. Navigate to a screen in the line-of-business application containing data that you will use to create a new Unity Form.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged in to OnBase, you are prompted to do so.
4. The form is displayed. It includes the Keyword Value or Keyword Values from the line-of-business application.
5. Review the form and add any additional information.
6. Submit the form to create it in OnBase.

Using the **Create New Unity Form** context in Application Enabler, if a scanner is connected to the system and the Unity Form has been configured with an attachment control, documents can be scanned and attached directly to a Unity Form.

---

**Note:** For more information about using attachment controls in Unity Forms, see the Unity Forms module reference guide.

---

To scan and attach a document to a new Unity Form:

1. Navigate to a screen in the line-of-business application containing data that you will use to create a new Unity Form.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged in to OnBase, you are prompted to do so.



4. The form is displayed.

The screenshot shows a web application window titled "Create Unity Form". The window has a dark blue header bar with the title and standard window controls (minimize, maximize, close). Below the header, there is a light blue sidebar on the left with a tab labeled "Student Information". The main content area is white and contains a form with the following fields:

- Student ID**: A text input field.
- Program**: A text input field.
- First Name**: A text input field.
- Submit Date**: A date input field showing "05/10/2017".
- Last Name**: A text input field.
- Status**: A text input field.
- Requested Major**: A text input field.
- Reason**: A large text area for a detailed response.
- Attach Supporting Document**: A section with a blue "Attach" button.
- Submit**: A blue button at the bottom left of the form area.

At the bottom of the window, there is a light blue footer bar with the text "Acquire Attachments" and a small icon on the right.

5. If the **Acquire Attachments** pane is not expanded, click the expand button or anywhere on the pane header to display the entire pane.

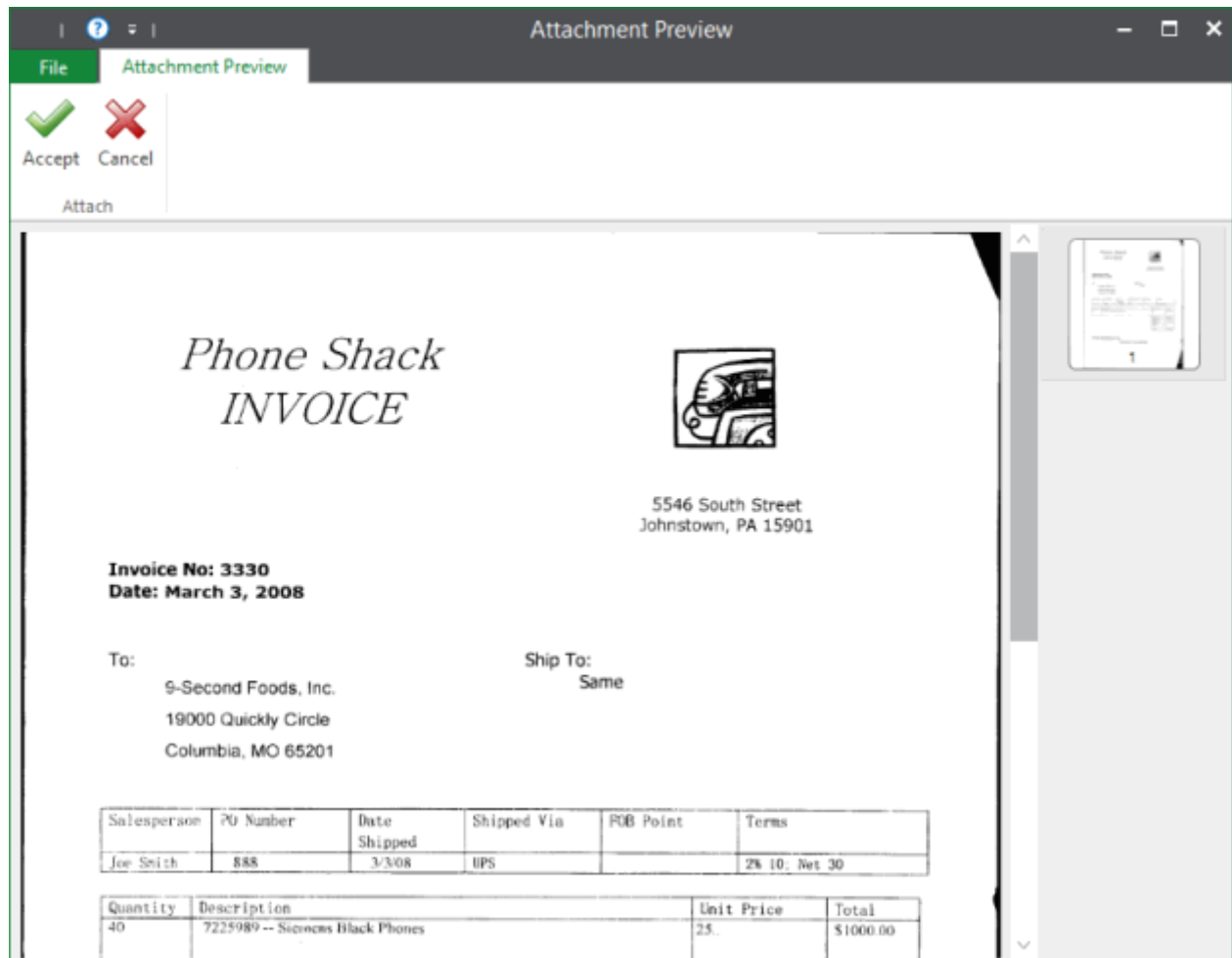
**Note:** The Unity Form will be read-only while the **Acquire Attachment** pane is expanded and active.

The screenshot shows a window titled "Create Unity Form". At the top, a message states "Form is read only while acquiring attachment." Below this is a "Student Information" section with fields for Student ID, First Name, Last Name, Program, Submit Date (05/10/2017), and Status. There are also fields for Requested Major and Reason. At the bottom, the "Acquire Attachments" pane is expanded, showing an "Attachment Field" dropdown, an "Attachment" dropdown, a "Source" dropdown (set to "HP Scanjet 7000 Doc TV"), and checkboxes for "Show Scanner Settings" and "Show Preview". "Acquire" and "Cancel" buttons are at the bottom right of the pane.

If no documents need to be scanned, the **Acquire Attachments** pane can be minimized and the Unity Form can be filled out as normal.

6. If there are multiple attachment controls on the Unity Form, select the appropriate attachment control from the **Attachment Field** drop-down.
7. If there are multiple Document Types associated with the selected attachment control, select the appropriate Document Type to attach from the **Attachment** drop-down.
8. If there are multiple scanning sources available to choose from, select the appropriate scanner from the **Source** drop-down.
9. If **Show Scanner Setting** is selected, depending on the system configuration, after clicking **Acquire** the scanner's settings may be displayed.

10. If **Show Preview** is selected, after clicking **Acquire** the scanned images are displayed in the **Attachment Preview** window.



11. If the images are correct, click **Accept**. Otherwise, click **Cancel** to close the window and return to the Unity Form and the **Acquire Attachments** pane to acquire another document.

**Create Unity Form**

**Student Information**

**Student ID**

**Program**

**First Name**

**Submit Date**  
05/10/2017

**Last Name**

**Status**

**Requested Major**

**Reason**

**Attach Supporting Document**

Acquired Document [Remove](#)

**Attach**

**Submit**

Acquire Attachments

12. Repeat steps 6-11 to scan and attach any additional documents.
13. Review the form and add any additional information.
14. Submit the form to create it in OnBase.

## Create WorkView Object

Application Enabler allows you to create a new WorkView object directly from the line-of-business application.

To create a new WorkView object:

1. Navigate to a screen in the line-of-business application containing data that you will use to create a new WorkView object.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged on to OnBase, you are prompted to do so.
4. A message appears confirming that the WorkView Object has been created.
5. Depending on your configuration, this new object may be displayed after creation.

## FolderPop

Application Enabler allows you to retrieve folders directly from the line-of-business application, using FolderPop.

To retrieve folders using FolderPop:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve folders.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Folders with matching values will be returned.

## Generate Document Packet

Application Enabler allows you to generate Document Packets directly from the line-of-business application.

---

**Note:** In order to generate document packets, you must have the **Document Packets** User Group privilege configured.

---

To generate a new Document Packet:

1. Navigate to a screen in the line-of-business application that contains data that you will use to initiate document packet generation.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged on to OnBase, you are prompted to do so.
4. The **Select Packet Template** dialog is displayed. From the drop-down, select the desired packet template to generate.
5. Depending on your configuration, the document packet may generate automatically, or the **Packet Content Selection** dialog is displayed. For more information on using Document Packets, see the **Document Packaging** module reference guide.

## Index

Application Enabler's indexing feature allows you to index OnBase documents in the Unity Client directly from the line-of-business application, eliminating the need to key index information into OnBase. Index values are scraped from configured areas on the screen. Screen scraping allows OnBase to collect Keyword Values from the enabled application's configured data capture areas and use the information for indexing purposes. Values scraped are case sensitive. There is no limit to the number of index values that can be scraped from the line-of-business application.

Application Enabler's indexing feature can be used to scrape values in to the following areas:

- The **Add/Modify Keywords** pane, including the **Add/Modify Keywords** pane that is displayed in the **Document Separation** window.
- The **Re-Index** pane, including the re-indexing user interaction window that is displayed when executing the Workflow **Re-Index Document** action.
- The **Document Separation** window.
- The **Scanning** pane in the Document Imaging module's **Batch Indexing** layout.
- The **Import** pane, including:
  - The indexing user interaction window that is displayed when executing the Workflow **Import Document** action.
  - The **Import** pane that is displayed in the **Document Separation** window.

To use Application Enabler's indexing feature:

1. Navigate to the area of the OnBase Unity Client where you will be using Application Enabler indexing. For example, open the **Import** layout.
2. Navigate to a screen in the line-of-business application containing data that you will use to index.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.

---

**Note:** When indexing is used in conjunction with AutoFill Keyword Sets, the corresponding Keyword Values are automatically populated in the Unity Client when a primary Keyword Value is entered in the line-of-business application. Depending on your configuration and the area where you are using indexing, you may not be able to expand the AutoFill Keyword Set.

---

4. If you are indexing or re-indexing and more than one Document Type is configured for Application Enabler, you may have to select the appropriate Document Type. Depending on your configuration, you may not be prompted to select a Document Type.
5. Click the appropriate button to index, re-index, or save keyword modifications.

## Patient Window

Application Enabler allows you to retrieve chart documents directly from the line-of-business application, using the OnBase Patient Window.

To retrieve chart documents using the OnBase Patient Window:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve documents.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Depending on your authentication configuration, you may be prompted to login. If you are prompted to login, enter a **User Name** and **Password** and click **Login**.
4. Charts matching the scraped values are returned.

---

**Note:** Depending on your configuration, the window that is used to display matching documents may be reused when performing subsequent document retrievals.

---

## Retrieve Deficiencies

---

**Note:** To access charts through DeficiencyPop, users must have sufficient Medical Records Management privileges. See the Medical Records Management Solution module reference guide for information about required privileges for chart access.

---

Application Enabler allows you to retrieve charts directly from the line-of-business application, using DeficiencyPop.

To retrieve charts via DeficiencyPop:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve charts.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Depending on your authentication configuration, you may be prompted to login. If you are prompted to login, enter a **User Name** and **Password** and click **Login**.
4. All of the accessible Deficiencies are returned.

## Retrieve Document Tracking Folders

Application Enabler allows you to retrieve Document Tracking folders directly from the line-of-business application.

To retrieve Document Tracking folders:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve Document Tracking folders.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Document Tracking folders with matching values will be returned and displayed in the Document Tracking interface.

## Retrieve Documents

Application Enabler allows you to retrieve documents directly from the line-of-business application.

To retrieve documents:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve documents.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. The corresponding documents are retrieved and displayed in the **Document Search Results** list.

---

**Note:** If the Unity Client is already open when you retrieve documents, documents are retrieved and displayed in a new window.

---

## Retrieve Folders

Application Enabler allows you to retrieve folders and their contents from within the Folders interface, directly from the line-of-business application.

To retrieve folders:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve folders.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Folders with matching values will be returned within the File Cabinets interface.

## Retrieve in Workflow

Application Enabler allows you to open a Workflow queue or prompt you to select a Workflow queue, directly from the line-of-business application.

To open a Workflow queue:

1. Navigate to a screen in the line-of-business application containing data that you will use to open a Workflow queue.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged in to OnBase, you are prompted to do so.
4. If you are not prompted to select a Workflow queue, the Workflow interface opens, displaying the queue.  
Proceed to the next step if you are prompted to select a Workflow queue.



5. When you are prompted to select a queue, you can either select the appropriate queue and click **OK** or click **Auto Find**.

If you selected a queue and clicked **OK**, the Workflow interface opens. Depending on your configuration, a document may be selected and displayed. In some configurations, the first document listed in a queue is always displayed regardless of its Keyword Values. In other configurations, the first document that has Keyword Values that match the Keyword Values scraped with Application Enabler will be selected and displayed.

If you clicked the **Auto Find** button, Application Enabler will search in all the listed queues and try to find a document that matches the scraped Keyword Values. If there are several documents matching the value(s) scraped, the first document in the queue that matches the keyword(s) is displayed. If a blank value is scraped, then the first document of the first queue is displayed.

## Retrieve Plan Review Projects

Application Enabler allows you to retrieve Electronic Plan Review documents directly from the line-of-business application.

To retrieve Electronic Plan Review documents:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve Electronic Plan Review documents.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Depending on your authentication configuration, you may be prompted to login. If you are prompted to login, enter a **User Name** and **Password** and click **Login**.
4. Documents matching the scraped values are returned in a separate window.

## Retrieve WorkView Objects

Application Enabler allows you to retrieve WorkView objects directly from the line-of-business application.

To retrieve WorkView objects:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve WorkView objects.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged on to OnBase, you are prompted to do so.
4. The filter results list is displayed in a new window. This list will always be displayed, even if only one result is returned.

---

**Note:** You must have rights to the WorkView filter for the filter results list to be displayed.

---

## Run Custom Query

Application Enabler allows you to run a custom query directly from the line-of-business application, eliminating the need to key query information into OnBase.

To run a Custom Query:

1. Navigate to a screen in the line-of-business application containing data that you will use to run a Custom Query.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. The corresponding documents are retrieved and displayed in the **Document Search Results** list.

## Run Script

Application Enabler allows you to run a script directly from the line-of-business application.

To run a script:

1. Navigate to a screen in the line-of-business application containing data that you will use to run a script.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged in to OnBase, you are prompted to do so.
4. The script is executed.

## Run Unity Script

Application Enabler allows you to run a Unity Script directly from the line-of-business application.

To run a Unity Script:

1. Navigate to a screen in the line-of-business application containing data that you will use to run a Unity Script.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged in to OnBase, you are prompted to do so.
4. The Unity Script is executed.

## Upload Document

Application Enabler's uploading feature allows you to upload documents to OnBase directly from the line-of-business application. Index values are scraped from configured areas on the screen, eliminating the need to key index information into OnBase. Screen scraping allows OnBase to collect Keyword Values from the enabled application's configured data capture areas and use the information for indexing purposes. Values scraped are case sensitive. There is no limit to the number of index values that can be scraped from the line-of-business application.

To upload a document:

1. Navigate to a screen in the line-of-business application containing data that you will use to upload a document.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If more than one Document Type is configured for Application Enabler, you may have to select the appropriate Document Type. Depending on your configuration, you may not be prompted to select a Document Type.
4. If you are not already logged in to OnBase, you are prompted to do so.
5. The Unity Client's **Upload** layout is displayed. The **Upload** pane displays the Keyword Values scraped from the line-of-business application.  
When uploading is used in conjunction with AutoFill Keyword Sets, the corresponding Keyword Values are automatically populated in the Unity Client when a primary Keyword Value is entered in the line-of-business application.
6. Select the appropriate file to upload using one of the buttons in the **Import** ribbon group.
7. Click **Upload**.
8. Repeat the above steps to upload additional documents.

## Bar Code Generator Contexts

Bar Code Generator contexts are executed using the Bar Code Generator module.

---

**Note:** You must be licensed for Bar Code Generator and have the Bar Code Generator executable installed on your workstation in order to use Bar Code Generator contexts.

---

## Render Barcode Pages

Application Enabler allows you render bar codes directly from the line-of-business application, eliminating the need to key indexing information into OnBase.

To render bar codes:

1. Navigate to a screen in the line-of-business application containing data that you will use to render bar codes.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. The bar code sheet containing values from the line-of-business application screen is generated.

## Desktop Contexts

### Auto Login for Retrieval

---

**Note:** This context is maintained for legacy purposes only.

---

If you wish to automatically login to the Desktop when you are using Application Enabler to retrieve documents from the Desktop, the following must be applied to the **Target** field in the Application Enabler executable's shortcut (accessed by right-clicking on the shortcut and selecting **Properties**):

```
-AE:AL -AE:UN="username" -AE:PW="password"
```

Replace **username** and **password** in the above example with the appropriate user name and password.

## Create New E-Form

---

**Note:** This context is maintained for legacy purposes only.

---

Application Enabler allows you to create new E-Forms directly from the line-of-business application, eliminating the need to key index information into OnBase.

To create a new E-Form:

1. Navigate to a screen in the line-of-business application containing data that you will use to create a new E-Form.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged on to the Desktop, you are prompted to do so.
4. The form is submitted and created in OnBase.
5. Depending on your configuration, the form may be displayed. It includes the Keyword Value or Keyword Values from the line-of-business application.
6. Review the form and, if necessary, add any additional information.

## Index

---

**Note:** This context is maintained for legacy purposes only.

---

Application Enabler's indexing features allow you to index OnBase documents directly from the line-of-business application, eliminating the need to key index information into OnBase. Index values are scraped from configured areas on the screen. Screen scraping allows OnBase to collect Keyword Values from the enabled application's configured data capture areas and use the information for indexing purposes. Values scraped are case sensitive. There is no limit to the number of index values that can be scraped from the line-of-business application.

Application Enabler's indexing feature can be used to scrape values in to the following areas:

- The **Store Document** dialog box.
- The **Re-Index Document** dialog box.

To use Application Enabler's indexing feature:

1. Navigate to the area of OnBase where you will be using Application Enabler indexing. For example, if you are storing a document, select **Store Document** to open the **Store Document** dialog box.
2. Navigate to a screen in the line-of-business application containing data that you will use to index.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.  
When indexing is used in conjunction with AutoFill Keyword Sets, the corresponding Keyword Values are automatically populated in OnBase when a primary Keyword Value is entered in the line-of-business application.
4. If more than one Document Type is configured for Application Enabler, you may have to select the appropriate Document Type. Depending on your configuration, you may not be prompted to select a Document Type.

---

**Note:** If values exist for a Keyword Type, the value scraped from the line-of-business application will be appended to the document and it will not replace the current value for the Keyword Type. If you only want the scraped values to be associated with the document, you must manually delete the Keyword Values that you do not want associated with the document.

---

5. Click the appropriate button to index or re-index the document.

## Retrieve Documents

---

**Note:** This context is maintained for legacy purposes only.

---

Application Enabler allows you to retrieve documents directly from the line-of-business application.

To retrieve documents:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve documents.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. The corresponding documents are retrieved and displayed in the **Document Search Results** list.  
If only a single document is retrieved, it is automatically displayed in the **Document Viewer**.

## Retrieve Folders

---

**Note:** This context is maintained for legacy purposes only.

---

Application Enabler allows you to retrieve folders and their contents from within the Folders interface, directly from the line-of-business application.

To retrieve folders:

1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve folders.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Folders with matching values will be returned within the File Cabinets interface.

## Retrieve in Workflow

---

**Note:** This context is maintained for legacy purposes only.

---

Application Enabler allows you to open a Workflow queue or prompt you to select a Workflow queue, directly from the line-of-business application.

To open a Workflow queue:

1. Navigate to a screen in the line-of-business application containing data that you will use to open a Workflow queue.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged in to OnBase, you are prompted to do so.
4. If you are not prompted to select a Workflow queue, the Workflow interface opens, displaying the queue.

Proceed to the next step if you are prompted to select a Workflow queue.

5. When you are prompted to select a queue, you can either select the appropriate queue and click **OK** or click **Auto Find**.

If you selected a queue and clicked **OK**, the Workflow interface opens. Depending on your configuration, a document may be selected and displayed. In some configurations, the first document listed in a queue is always displayed regardless of its keyword values. In other configurations, the first document that has Keyword Values that match the Keyword Values scraped with Application Enabler will be selected and displayed.

If you clicked the **Auto Find** button, Application Enabler will search in all the listed queues and try to find a document that matches the scraped Keyword Values. If there are several documents matching the value(s) scraped, the first document in the queue that matches the keyword(s) is displayed. If a blank value is scraped, then the first document of the first queue is displayed.

## Run Custom Query

---

**Note:** This context is maintained for legacy purposes only.

---

Application Enabler allows you to run a custom query directly from the line-of-business application, eliminating the need to key query information into OnBase.

To run a Custom Query:

1. Navigate to a screen in the line-of-business application containing data that you will use to perform a Custom Query.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged on to the Desktop, you are prompted to do so.
4. The corresponding documents are retrieved and displayed in the **Document Search Results** list.

## Run Script

---

**Note:** This context is maintained for legacy purposes only.

---

Application Enabler allows you to run a script directly from the line-of-business application.

To run a script:

1. Navigate to a screen in the line-of-business application containing data that you will use to run a script.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. If you are not already logged in to OnBase, you are prompted to do so.
4. The script is executed.

## Disconnected Scanning Contexts

### Cancel Index

Application Enabler allows you to cancel indexing in the Disconnected Scanning module directly from the line-of-business application.

To cancel indexing:

1. Select the screen in the line-of-business application containing data that you are using to index in the Disconnected Scanning module.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Indexing is cancelled.

## Index

Application Enabler allows you to populate index values for documents residing in the Disconnected Scanning module's **Awaiting Index** and **Index in Progress** scan queues.

---

**Note:** The **-AE:INDEX** switch is not available for use with Disconnected Scanning Indexing. You must use the **-AE** switch to perform indexing using Application Enabler in Disconnected Scanning.

---

To index documents:

1. In Disconnected Scanning, open the **Awaiting Index** or **Index in Progress** queue containing the documents to index.

---

**Note:** The user must belong to a user group that has rights to access the scan queue.

---

2. Right-click on the batch to index and select **Index Documents**.
3. Navigate to a screen in the line-of-business application containing data that you will use to index.
4. Perform the configured mouse/keyboard event on the line-of-business application screen.
5. The Keyword Values scraped from the line-of-business application are automatically populated in the Disconnected Scanning Indexing Window's keyword input fields.

---

**Note:** When indexing is used in conjunction with AutoFill Keyword Sets, the corresponding Keyword Values are automatically populated in the Disconnected Scanning module when a primary Keyword Value is entered in the line-of-business application.

---

6. If more than one Document Type is configured for Application Enabler, you may have to select the appropriate Document Type, then click **OK**.
7. If the indexing changes are not automatically saved, click **Index**.

## Front Office Scanning Contexts

### Index

Application Enabler allows you to capture data from a line-of-business application and use that data to automatically create a dataset to be used by a Front Office Scanning workstation.

For more information on using this functionality, see the Front Office Scanning help files.



# Office Integration Contexts

## Index

### Office Business Application Indexing

Application Enabler's indexing features allow you to index documents directly from the line-of-business application, eliminating the need to type index information. Index values are scraped from configured areas on the screen. Screen scraping allows you to collect Keyword Values from the enabled application's configured data capture areas and use the information for indexing purposes. Values scraped are case sensitive. There is no limit to the number of index values that can be scraped from the line-of-business application.

Application Enabler's indexing feature can be used to scrape values into the following areas in the Office Business Application for 2013 or Office Business Application for 2016:

- The **Import** pane.
- The **Add/Modify Keywords** pane.
- The **Re-Index Document** pane.

Application Enabler's indexing feature can also be used to scrape values into the **Import Document** pane of the Integration for Microsoft Outlook 2013 or Integration for Microsoft Outlook 2013.

### Office Business Application

To use Application Enabler's indexing feature from the Office Business Application for 2013 or Office Business Application for 2016:

1. Navigate to the area of the OnBase Unity Client where you will be using Application Enabler indexing. For example, open the **Import** layout.
2. Navigate to a screen in the line-of-business application containing data that you will use to index.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.
4. If you are indexing or re-indexing and more than one Document Type is configured for Application Enabler, you may have to select the appropriate Document Type. Depending on your configuration, you may not be prompted to select a Document Type.

---

**Note:** When multiple documents are open and their **Add/Modify Keywords** or **Re-Index** panes are displayed, Application Enabler will populate all open **Add/Modify Keywords** or **Re-Index** panes.

---

5. Click the appropriate button to index, re-index, or save keyword modifications.

## Integration for Microsoft Outlook

To use Application Enabler's indexing feature to index email and attachments in the Integration for Microsoft Outlook 2013 or Integration for Microsoft Outlook 2016:

1. Import an email in the Integration for Microsoft Outlook 2013 or Integration for Microsoft Outlook 2016.
2. Navigate to a screen in the line-of-business application containing data that you will use to index.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.
4. If more than one Document Type is configured for Application Enabler, you may have to select the appropriate Document Type. Depending on your configuration, you may not be prompted to select a Document Type.
5. The **Import Document** pane displays the Keyword Value or Keyword Values from the line-of-business application.
6. Click **Import**.

## OnBase Client Contexts

In order to use OnBase Client contexts, one of the following command line switches must be appended to the OnBase Client shortcut:

Command Line Switch	Functionality
<b>-AE</b>	Enables OnBase Client indexing, retrieval, and folder retrieval.
<b>-AE:INDEX</b>	Enables OnBase Client indexing.
<b>-AE:RETRIEVE</b>	Enables OnBase Client retrieval and folder retrieval.

## Cancel Index

Application Enabler allows you to cancel indexing in the Document Imaging module directly from the line-of-business application.

To cancel indexing:

1. Select the screen in the line-of-business application containing data that you are using to index in the Document Imaging module.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Indexing is cancelled.
4. Depending on your configuration, the next document may be shown, or you will be returned to the list of scan queues.

## Index

Application Enabler's indexing features allow you to index OnBase documents directly from the line-of-business application, eliminating the need to key index information into OnBase. Index values are scraped from configured areas on the screen. Screen scraping allows OnBase to collect Keyword Values from the enabled application's configured data capture areas and use the information for indexing purposes. Values scraped are case sensitive. There is no limit to the number of index values that can be scraped from the line-of-business application.

Application Enabler's indexing feature can be used to scrape values in to the following areas:

- The **Add/Modify Keywords** dialog box.
- The **Re-Index Document** dialog box, including the re-indexing user interaction window that is displayed when executing the Workflow **Re-Index Document** action.
- The keywords pane in the Document Imaging module's **Document Imaging** window, as well as the Document Imaging module's **Create new document from existing** dialog box.
- The **Import Document** dialog box, including the indexing user interaction window that is displayed when executing the Workflow **Import Document** action.
- The user interaction windows that are displayed when executing the Workflow **Display HTML Form** action (this includes both **this document** and **related document** targets).
- The Virtual Print Driver module's **Import from Virtual Printer** dialog box.
- The **Document Separation** window.

To use Application Enabler's indexing feature:

1. Navigate to the area of the OnBase Client where you will be using Application Enabler indexing. For example, if you are importing a document, open the **Import Document** dialog box.
2. Navigate to a screen in the line-of-business application containing data that you will use to index.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.

---

**Note:** If values already exist for a Keyword Type, the value scraped from the line-of-business application will be appended to the document and it will not replace the current value for the Keyword Type. If you only want the scraped values to be associated with the document, you must manually delete the Keyword Values that you do not want associated with the document.

---

---

**Note:** When indexing is used in conjunction with AutoFill Keyword Sets, the corresponding Keyword Values are automatically populated in the OnBase Client when a primary Keyword Value is entered in the line-of-business application. Depending on your configuration and the area where you are using indexing, you may not be able to expand the AutoFill Keyword Set.

---

4. If you are indexing or re-indexing and more than one Document Type is configured for Application Enabler, you may have to select the appropriate Document Type. Depending on your configuration, you may not be prompted to select a Document Type.

5. Click the appropriate button to index, re-index, save keyword modifications, or submit the form.

## Retrieve Documents

Application Enabler allows you to retrieve documents directly from the OnBase Client, directly from the line-of-business application.

To retrieve documents using the OnBase Client:

1. Open the OnBase Client with the correct command line switch applied. In some configurations, the OnBase Client **Document Retrieval** dialog box cannot be minimized or retrieval will not be successful using Application Enabler.
2. Navigate to a screen in the line-of-business application containing data that you will use to retrieve documents.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.
4. The corresponding documents are retrieved and displayed in the **Document Search Results** list.

## Retrieve Folders

Application Enabler allows you to retrieve folders and their contents from the OnBase Client within the Folders interface, directly from the line-of-business application.

To retrieve folders:

1. Open the OnBase Client with the correct command line switch applied.
2. Navigate to a screen in the line-of-business application containing data that you will use to retrieve folders.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.
4. Folders with matching values will be returned within the File Cabinets interface. If only one folder matches the scraped values, it will automatically open. If multiple folders match the criteria, they will all be displayed, but will need to be opened manually.

## RAC Audit Contexts

### Audit Search

---

**Note:** This context is maintained for legacy purposes only.

---

Application Enabler allows you to conduct RAC Audit searches directly from the line-of-business application.

To conduct RAC Audit searches:

1. Open and log in to RAC Administration.
2. Navigate to a screen in the line-of-business application containing data that you will use to conduct a RAC Audit search.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.
4. Depending on your authentication configuration, you may be prompted to enter a **User Name** and **Password**.
5. Click **Login**. The search results will display in the RAC Audit Search interface.

## Patient Search

---

**Note:** This context is maintained for legacy purposes only.

---

Application Enabler allows you to conduct RAC Patient searches directly from the line-of-business application.

To conduct RAC Patient searches:

1. Open and log in to RAC Administration.
2. Navigate to a screen in the line-of-business application containing data that you will use to conduct a RAC Patient search.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.
4. Depending on your authentication configuration, you may be prompted to enter a **User Name** and **Password**.
5. Click **Login**. The search results will display in the RAC Patient Search interface.

## Web Client Contexts

### Cancel Index

Application Enabler allows you to cancel indexing in the Document Imaging module directly from the line-of-business application.

To cancel indexing:

1. Select the screen in the line-of-business application containing data that you are using to index in the Document Imaging module.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. Indexing is cancelled, and you are returned to the list of scan queues.

---

**Note:** If the scan queue has the **Cancel Context Skips Document** option selected in the Configuration module, then performing the **Cancel Index** context will skip indexing the current document instead of returning you to the list of scan of queues.

---

## Index

---

**Note:** This functionality is only available when using the ActiveX Web Client.

---

Application Enabler's indexing features allow you to index OnBase documents directly from the line-of-business application, eliminating the need to key index information into OnBase. Index values are scraped from configured areas on the screen. Screen scraping allows OnBase to collect Keyword Values from the enabled application's configured data capture areas and use the information for indexing purposes. Values scraped are case sensitive. There is no limit to the number of index values that can be scraped from the line-of-business application.

Application Enabler's indexing feature can be used to scrape values in to the following areas:

- The **Re-Index Document** dialog box, including the re-indexing user interaction window that is displayed when executing the Workflow **Re-Index Document** action.
- The keywords pane in the Document Imaging module's **Scanning** window.
- The **Import Document** panel.

To use Application Enabler's indexing feature:

1. Navigate to the area of the OnBase Web Client where you will be using Application Enabler indexing. For example, if you are importing a document, select **Import Document** from the Document mode drop-down list.
2. Navigate to a screen in the line-of-business application containing data that you will use to index.
3. Perform the configured mouse/keyboard event on the line-of-business application screen.
4. If more than one Document Type is configured for Application Enabler, you may have to select the appropriate Document Type. Depending on your configuration, you may not be prompted to select a Document Type.
5. Click the appropriate button to index or re-index the document.

## Retrieve Documents

Application Enabler allows you to retrieve documents directly from the line-of-business application.

To retrieve documents:


1. Navigate to a screen in the line-of-business application containing data that you will use to retrieve documents.
2. Perform the configured mouse/keyboard event on the line-of-business application screen.
3. The corresponding documents are retrieved and displayed in the **Document Search Results** list.

## Retrieve Folders

Application Enabler allows you to retrieve folders and their contents from the OnBase Web Client within the Folders interface, directly from the line-of-business application.

To retrieve folders:

1. Open the Web Client.
2. Open the **Folders** interface using the drop-down list.
3. Navigate to a screen in the line-of-business application containing data that you will use to retrieve folders.
4. Perform the configured mouse/keyboard event on the line-of-business application screen.
5. The folder is opened and the first document listed in the folder is opened. In addition, a folder search item will display in the file cabinet box that can be double-clicked on later to retrieve the same folder. The following is an example:

 Folder Type: AE Folder Type - Account # = 123456 - Name = John Adams

The folder type is listed as well as the Keyword Types and their values that were scraped and used to retrieve the folder.

## Using Application Enabler Live

Live is a feature of Application Enabler that allows you to perform real-time document retrieval from an enabled line-of-business application.

When working in Application Enabler Live:

- You can still execute context events, including Application Enabler OCR functionality.

---

**Note:** Application Enabler Live will not function with Copy to Clipboard screens.

---

- If preprocess scripts are configured, they will run.

## Live Count Window

The **Live Count** window is displayed after starting Application Enabler Live:



When you move your mouse over a configured hotspot in your line-of-business application or type a new value in a line-of-business application's field that is configured as a hotspot, the number of documents retrieved by the query is displayed in the top right corner of the **Live Count** window:



This count updates in real-time as you move your mouse between configured hotspots in your line-of-business application or type new values in a configured line-of-business application field.

---

**Note:** A maximum of 2,000 documents can be retrieved when using Application Enabler Live.

---

This count is not displayed if:

- Your mouse or keyboard cursor is in an area of the line-of-business application that is not configured.
- The line-of-business application contains incomplete or invalid data.
- Your mouse or keyboard cursor is in a line-of-business application that is not configured.

---

**Note:** The **Live Count** window is always displayed over other windows on your workstation's desktop. The position of the window persists between sessions.

---

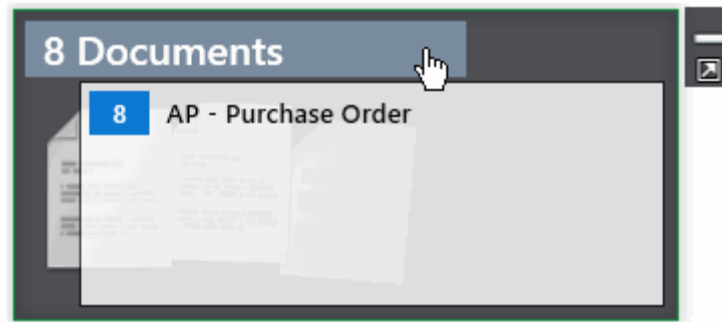
---

**Note:** When a Keyword Type is configured as a **Warn and continue** required keyword, Application Enabler performs the retrieval without the missing keyword. When a Keyword Type is configured as a **Warn and cancel** required keyword, Application Enabler does not perform the retrieval without the missing keyword. Application Enabler does not perform the retrieval when a keyword has an invalid format.

---



To view the results from your query, move your mouse over the document count:

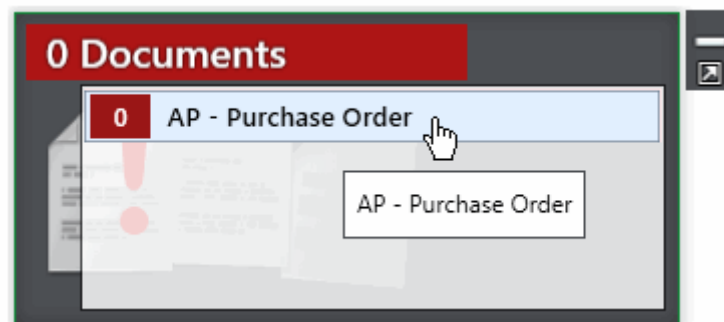


The number of documents and corresponding OnBase Document Type is displayed. Only Document Types that you have rights to are displayed.

Depending on your configuration, if there are no documents found for a Document Type, an exclamation point may be displayed in the **Live Count** window:





When you view the results of the query, the name of the Document Type is displayed in red:



To view these documents, click the document count or one of the available Document Types. The **Live Retrieval** window is displayed.

The following buttons are available in the **Live Count** window:

Button	Description
	Click to minimize the <b>Live Count</b> window. You can also minimize the <b>Live Count</b> window by selecting <b>Close</b> from the Windows taskbar.
	Click to expand the list of Document Types in the <b>Live Count</b> window.

To refresh the **Live Count** window, move the mouse outside your line-of-business application and then back over a configured hotspot in your line-of-business application.

---

**Note:** The **Live Count** window will only refresh results when you mouse over a different hotspot in your line-of-business application or if the result from the same hotspot has changed since its last mouse over.

---

## Live Retrieval Window

The **Live Retrieval** window is similar to a Unity Client Document Search Results list. For more information on the available features and functionality in the Unity Client Document Search Results lists, see the **Unity Client** documentation.

When working in the **Live Retrieval** window:

- You can double-click a tab to show or hide the ribbon.
- The **File** menu is available, and contains the following options: Help, User Options, and Change Password. For more information on these options, see the **Unity Client** documentation.

## Exposure

The Application Client Connector (ACC) is an alternative integration method within the same product suite as Application Enabler. The Application Client Connector can be used to provide an URL integration to OnBase from a line-of-business (LOB) application. End users can then access a web client interface to retrieve OnBase documents, scan documents into OnBase, import documents into OnBase, and print bar code sheets for scanning documents into OnBase at a later time.

To access the OnBase client and related documents, an URL is formulated within the LOB and posted to a browser using a push button or hyperlink programmatically within the LOB page. Related documents in OnBase are retrieved using metadata from the LOB pages mapped to OnBase Keyword Types, and posted within the URL. These Keyword Type mappings are configured within the ACC viewer and are stored for each LOB page.

This allows users to have real-time access to related OnBase documents from the LOB system.

## The Integration Solution

To provide this level of integration, you must have the ability to dynamically construct the URL and access the LOB pages in order to install a button object or hyperlink that can access specific metadata from the LOB page. Once your OnBase system is properly configured with Dynamic Folders, Document Types, Keyword Types, and access to a Web Server, the generated URL can be configured by mapping the Keyword Types to the LOB fields.

To create and save the configuration mapping in the ACC Viewer, a user must have the Keyword Configuration **Configuration Right**. After the mapping is saved, LOB end users will be able to press the button or click the hyperlink that has been added to the LOB screen to display the related OnBase documents based on the metadata passed in the URL. Additionally, mapped data can be used to pre-populate Keyword Values for documents that will be scanned or uploaded via the ACC Viewer.

## The URL String

The design of the integration allows the LOB Application to link with OnBase using context-specific URL string configurations that open in an Internet Explorer browser window. The following is an example of the URL string:

```
http://9secondfoods.com/appnet/  
ACCLogin.aspx?DBID=TEST&ScreenID=WORKORDER-  
ATTACHMENTS&ACCACTION=View&WORKORDERID =2323& PROJECTNAME=  
Bates%20Dr%20Sidewalks&LOCATION=Bay%20Village
```

The URL string is comprised of the following sections:

- `http://9secondfoods.com/appnet/ACCLogin.aspx?`: This section of the URL defines the OnBase host address and processing page.
- `DBID=TEST`: This section of the URL defines the system identifier to use for this query. It can be used to help distinguish between test systems and production systems.
- `ScreenID=WORKORDER-ATTACHMENTS`: This section of the URL is used to identify the context within the calling LOB application to use for this query. The first value is used to specify the context. Optionally, another value can be added to the string after a dash (-) character. This second value is used to specify the subcontext. In the above example, "WORKORDER" is the context, and "ATTACHMENTS" is the subcontext identifying a specific function being performed.
- `ACCACTION=View`: This section of the URL is used to identify the action being requested. The available actions include:
  - **VIEW** – Retrieves document(s) matching the specified search criteria. If no action is defined, the **View** action is used by default.
  - **SCAN** – Immediately launches the ad-hoc scanning dialog.
  - **IMPORT** – Immediately launches the file upload dialog.
- `WORKORDERID=2323&PROJECTNAME=Bates%20Dr%20Sidewalks&LOCATION=Bay%20Village`: This section of the URL defines parameters to be used as the names and values of the Line of Business object fields to be used by OnBase for the document query, import or scan. The only requirement for the names of these parameters is that they are the same for each request from a given business object/screen.

## Usage

When a document is retrieved from OnBase using an enabled application and the Application Client Connector, the document is displayed in the web-based OnBase ACC Viewer.

## Accessing the ACC Viewer

To launch the OnBase ACC viewer:

1. Within the integrated line-of-business (LOB) application, click the button added to the page to support the OnBase integration. Where available, **OnBase** can also be selected from the appropriate menu.

If available with your specific integration module, the button may also display the following information:

- **Docs**: The number of documents archived in OnBase related to the current LOB page (for example, **Docs (2)**). This count is only updated when the page is first loaded. If new documents are archived after the page is loaded, this count is not updated.
- **Auth Fail**: Authentication failed due to an improper Single Sign-On token.
- **Not Found**: The parameters used to search the OnBase repository are incorrect (e.g., an invalid URL or Keywords, or the required folder does not exist).

- **No Map:** Configuration of Keyword mappings for the current LOB page has not been completed.

**Note:** In order for this functionality to work correctly, the Application Enabler client must be installed on the workstation accessing the LOB page. Application Enabler does not need to be configured, the client just needs to be installed.






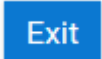
2. At the OnBase login screen, enter your user name and password.

After logging in, the default startup screen for OnBase is the **View Documents** screen. Users with configuration rights start at the **Configuration** screen.

If the button clicked is enabled for the **Scan**, **Import**, or **Barcode** action, then the corresponding screen is displayed.

## Menu Options

This section explains the functionality of the menu options available in the ACC Viewer:

Menu Item	Description
	<b>View Documents:</b> Allows user to see all documents available.
	<p><b>Scan a Document:</b> This is an optional feature that enables users to scan from disk or use an attached scanning device to archive documents into OnBase.</p> <p><b>Note:</b> Scanning may require the <b>Web Scanning Named User</b> license, depending on the solution with which you are integrating.</p>
	<p><b>Upload File:</b> Allows user to upload files from a local or network source.</p> <p><b>Note:</b> Uploading requires both the <b>Import</b> and <b>Create</b> user privileges.</p>
	<p><b>Print Barcode Sheet(s):</b> User may print bar code sheets for scanning batch documents.</p> <p><b>Note:</b> Printing bar codes requires the <b>Bar Code Generator</b> license.</p>
	<b>Configuration:</b> If available, enables user to map OnBase Keywords to fields in the LOB application.
	<b>Exit:</b> Closes OnBase window and returns user to the LOB application interface.

## View Documents

The document viewer screen is divided into two panes. The upper pane displays a list of documents that match the search criteria, and the lower pane displays the currently-selected document. Items in the Document Select List contain the version number at the beginning of the auto-name string.

Modifying Keywords and re-indexing are functions of the document select list right-click menu. Select any document in the document select list and right-click to view the menu options. Select **Keywords** to view and modify the Keywords. Select **Re-index...** to display a re-indexing dialog box. Right-click options are dependent on the permissions granted to the user.

## Scan a Document

Any required Keywords must be mapped prior to accessing the Scan a Document screen.

---

**Note:** **Scan a Document** is only supported for use with Microsoft Internet Explorer. In addition, this option is only supported when the **Display intranet sites in Compatibility View** option is selected or the domain name has been added to the **Compatibility View** list.

---

The **Scan a Document** window enables users who are licensed for this feature to scan documents using a scanner or to scan from disk.

For complete details on scanning documents, see the **Document Imaging** help files or module reference guide.

## Import Document

The **Import Document** window allows a user to upload a file from a local or network source. Uploading requires both the **Import** and **Create** user privileges.

---

**Note:** Any required Keywords must be mapped prior to accessing the **Import Document** screen.

---

## Importing Documents

Document import consists of a two-stage process. Users either browse to a file location and select a file to import, or users can drag and drop a file onto the document import screen. The document is held in a Document Queue while Document Type and Keyword information is added. Once the necessary information is entered, the document can be imported into OnBase. Depending on your configuration settings, you can also preview image files for easier indexing. With the EDM Services license, up to five documents can be imported at once.

---

**Note:** Some Document Types are configured to require Keyword Values to be entered in order to create and/or retrieve documents. Required Keyword Values are displayed in red for these operations, which may include the following: Document Retrieval, importing, indexing, re-indexing, viewing or modifying Keyword Values, and scanning.

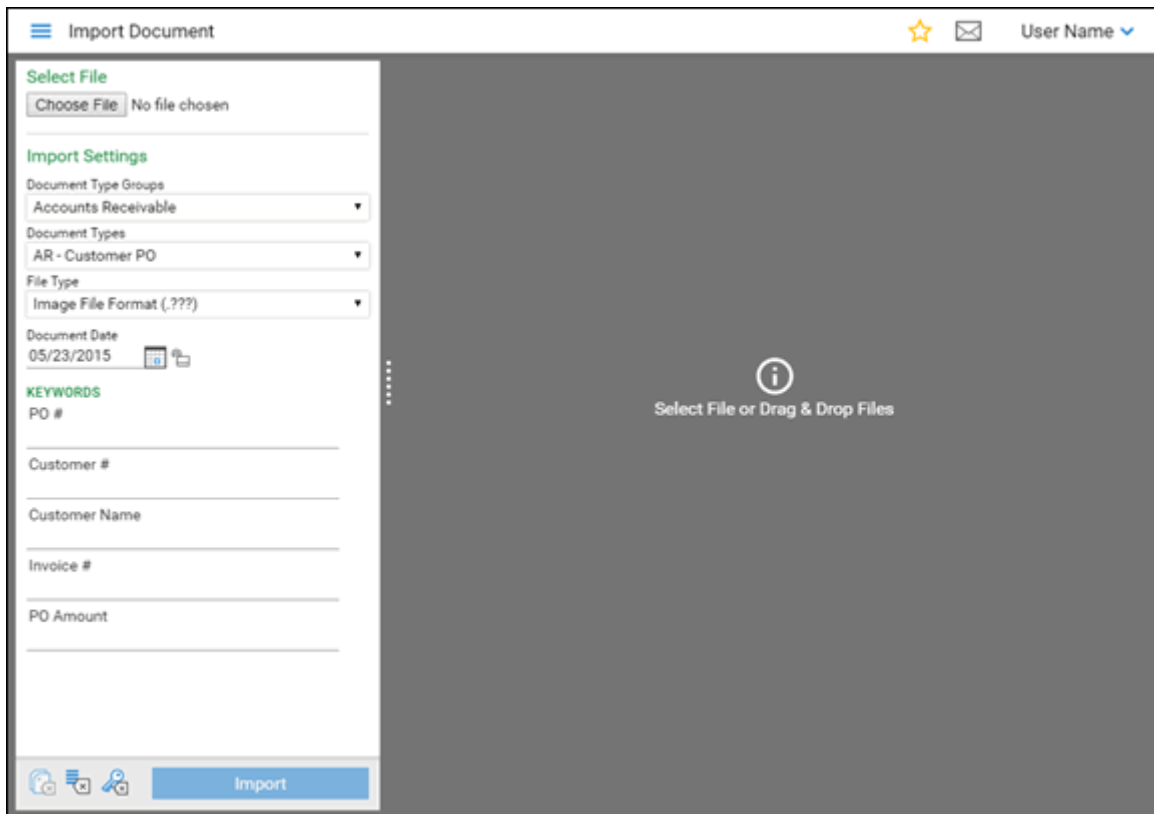
---

---

**Note:** This two-stage document import process is only available in the OnBase-supported versions of Safari, Firefox, and Internet Explorer.

---

1. To import a document, perform one of the following steps:
  - In the **Select File** field, identify the full file path for the document you are importing. Click the **Browse** button and browse to the file location.
  - Drag and drop a file onto the Import Document screen.



---

**Note:** If OnBase can correlate the file extension to a file type (format), it will automatically select that file type in the **File Type** field. For example, if you import a file whose extension is .doc, OnBase will select **Microsoft Word document (.doc)**.

---

The selected file is added to the **Document Queue** list on the **Import Document** screen.

2. Select the **Show Preview** option to preview the document being imported. Only previews of image files are displayed. Previews are not displayed for PDF documents larger than 100 MB.

---

**Note:** This option is only available if it has been configured by your system administrator.

---

3. Select the **Initiate Workflow** option to add this new document to Workflow.

---

**Note:** This option is only available if your system is licensed for Workflow, the Document Type is part of an existing life cycle, and the Document Type is not configured to automatically initiate Workflow when a document is imported.

---

4. From the **Document Type Group** drop-down list, select the Document Type Group to assign the document to. (The list includes all Document Type Groups to which you have user import rights. These rights are granted by your system administrator.)
5. From the **Document Type** drop-down list, select the Document Type to assign the document to. (The list includes all Document Types to which you have user import rights. These rights are granted by your system administrator.)

When you select a Document Type, OnBase automatically displays fields for Keyword Types that are used to index documents of that type.

6. If a file type has not already been selected, select the appropriate type from the **File Type** drop-down list.

Note the following:

- Depending on your system configuration, only certain file types may be available.
- Documents with a file format of Electronic Form cannot be imported.

---

**Caution:** Contact your system administrator before selecting the **Image Rendered PDF** file format, as selecting this file format without the proper system specifications can cause unexpected behavior.

---

7. Select the **Queue for Full-Page OCR** option to add documents to the OCR queue upon import.

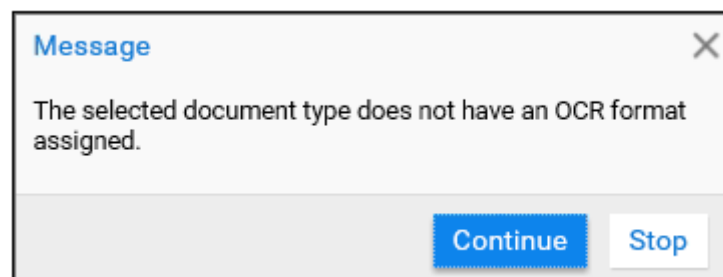
---

**Note:** This option is only available if your system is set up for OCR. See your system administrator for more information.

---

If you select the option to enable this feature, depending on the Document Type OCR format, one of the following occurs:

- If your Document Type format is configured to be No Full-Page OCR Format, when the document import occurs, a message box is displayed indicating that the document you are importing does not have an OCR format assigned.



Click **Continue** to proceed with the import process, or click **Stop** to cancel the import process.






- If your Document Type is configured to be <Default> or any other option, the import proceeds as expected.
8. Select the **Document Date**. To retain the selected date for future uploads, click the lock button next to the calendar. The selected date is retained until you click the lock button again to unlock it, or until you log off of OnBase.
  9. Type Keyword Values in the Keyword Type fields. Note the following:
    - Depending on your system's configuration, some values may be provided by default. Other Keyword Types may be configured as read-only, preventing you from indexing the document with a value for that Keyword Type. If the Keyword Type name is displayed in red, a Keyword Value is required.
    - If you select a different Document Type during import, entered Keyword Values for common Keyword Types are retained. For example, you enter a Keyword Value for the **City** Keyword Type and switch to a different Document Type also containing the **City** Keyword Type. The entered **City** Keyword Value is retained. This logic does not apply to Default Keyword Values. Default values for common Keyword Types are either updated or cleared when selecting a different Document Type during import, depending on whether the selected Document Type has default values for those Keyword Types.

---

**Note:** You can include special characters (such as ñ, å, etc.) in Keyword Values.

---

10. If you make a mistake, use the following buttons available at the bottom of the **Import Document** pane to clear the current indexing values.

Button	Description
	<b>Clear Imported Documents:</b> Click to clear the list of imported documents in the Document Queue.
	<b>Clear All:</b> Click to reset all indexing fields except for the file name, which retains the name of the file.
	<b>Clear Keywords:</b> Click to reset all Keyword Type fields.

11. If you are importing multiple documents, repeat the previous steps to add more documents to the import queue. The number of additional documents that you can add is listed in the **Select File** pane.

---

**Note:** Your system must be licensed for EDM Services to import multiple documents at one time.

---

To switch between documents, select a document from the **Document Queue**.

12. Click the **Import** button in the toolbar at the bottom of the panel. The Application Enabler imports the document to OnBase. If more information is needed to complete the import, a message displays the appropriate instructions.
  - Depending on how the Document Type is configured, or if the imported document is a revision you may be prompted to enter a comment.
  - You may be presented with additional options if you are importing a rendition of a document. For more information, see [Importing Renditions on page 152](#).
  - When the import is complete, a confirmation message is displayed next to the document in the **Document Queue**.

---

**Note:** Before importing the document, OnBase checks its file size against the maximum size allowed for imports. If the document is too large, you are notified that the import failed.

---

If you receive an **Import Failed** message, contact your system administrator.

## Print Barcode Sheet(s)

The **Print Barcode Sheet(s)** button allows users who are licensed for this feature to print bar code sheets.

---

**Note:** **Print Barcode Sheet(s)** is only supported for use with Microsoft Internet Explorer.

---

The purpose of creating a bar code separator sheet is to differentiate between groups of related documents. Bar code separator sheets can be laid on top of a group of related documents and delivered to a centralized scanning station. When the documents are scanned into OnBase, the bar code sheets act as document separators and provide Keyword indexing values. Once scanned, the documents are available to LOB application users without any additional interaction.

To print bar code separator sheets from within the LOB application interface:

1. Click the **Print Barcode Sheet(s)** toolbar button.
2. Each OnBase Document Type configured for the current LOB form is listed in the **Select document type for barcode printing** dialog box.

**Select All** is selected by default, meaning all available Document Types are selected by default. Deselect any Document Types that you do not want to print bar code separator sheets for.

Optionally, you can deselect **Select All** to deselect all Document Types, then select just those Document Types you want to print bar code separator sheets for.

---

**Note:** Do not select more than four Document Types for printing. Attempting to print bar code separator sheets for more than four Document Types at once may result in unexpected behavior.

---

3. Select **Send to Printer**.
4. Select the desired printer and other options in the Windows print dialog box.
5. Click **Print**.

## Configuration

If the Configuration icon is present, please refer to the Configuration section of the module reference guide for the specific integration you are using.

## Exit

Clicking this button closes the OnBase window and return the user to the LOB application interface.

## Indexing

After the configuration is complete, information from the LOB screens can be used to automate the indexing of documents as they are being archived into OnBase. Indexing can be done in a batch mode or on an ad hoc basis. Once the documents have been indexed into OnBase they are instantly available to all users who have rights to those documents. Retrieval and indexing are accessed from the OnBase icon(s) in the LOB application toolbar.

## Autofill Keyword Sets

Normally, to use the AutoFill functionality of the OnBase Client, a user would enter the Primary Keyword Value and use the **Tab** button on the keyboard to AutoFill the remaining Keyword Values.

If the Primary Keyword Value is auto-populated from the LOB form, the use of the AutoFill feature is slightly different. To populate the Keyword Type fields from the primary Keyword Type that is configured for AutoFill, you must change the value of the Primary Keyword Value, press **Tab**, change the Primary Keyword Value back to the original auto-populated value, then press **Tab** again. The Keyword Type fields will AutoFill with the values associated with the Primary Keyword Value taken from the LOB form.

See the Web Client module reference guide for more information on the functionality of AutoFill Keyword Sets within OnBase.

## Re-Indexing

The **Index Doc** button in your LOB application allows users to re-index documents already archived in OnBase with values updated in the LOB application.

---

**Note:** Depending on your system's configuration, this button may not be available or may not function exactly as described below. Contact your system administrator if your system does not appear to be configured for re-indexing.

---

To re-index a document in OnBase:

1. Log in to your LOB application and locate the record for the document you want to re-index.
2. Update the values for the record in the LOB application.

3. In a second window, log in to OnBase using the OnBase Client, Web Client, or Unity Client and retrieve the document to be re-indexed.
4. Right click the document in OnBase and select **Re-Index**. The re-indexing dialog is displayed.
5. Back in the LOB application, click the **Index Doc** button. The values for mapped Keywords are updated in OnBase.
6. Click **Re-Index** in the OnBase re-indexing dialog. The re-indexed values are saved in OnBase.

---

**Note:** The Application Enabler client must be running on the workstation performing the re-indexing. For completely details on using Application Enabler, see the Application Enabler help files or module reference guide.

---

## Application Enabler

You can leverage Application Enabler to extend the integration between OnBase and your LOB application. For example, Application Enabler enables OnBase re-indexing functionality from your LOB application (see [Re-Indexing on page 436](#)).

## Configuration

After enabling the third-party application for use with OnBase (see the **Installation** chapter of the **Application Enabler** module reference guide) there are several items that must be configured in OnBase using the OnBase Configuration module:

- Keyword Types that match those used in the enabled application;
- Document Type Groups and Document Types for documents archived using the enabled application;
- File Cabinets and Folder Types for use with documents archived using the enabled application.

After completing the OnBase configuration steps, the enabled application must then be mapped to OnBase using the “puzzle piece” Configuration page of the Application Client Connector.

Detailed instructions on how to configure the following elements in OnBase are available in the **System Administration** module reference guide or, in the case of Folders and File Cabinets, in the **Folders** module reference guide.

---

**Note:** This section outlines only those steps specifically required during configuration to ensure a functioning Application Enabler.

---

## Keyword Types

Create a new Keyword Type to store the data for each of the fields on the enabled pages that will be used to populate Keyword Types in OnBase. Ensure that the **Data Type** for each Keyword Type reflects the type of data that the matching field in the enabled application captures.

---

**Caution:** Do not create Keyword Types using names that are reserved by your external LOB system.

---

## Document Type Groups and Document Types

Create a Document Type Group for the Document Types under which documents will be archived using the enabled application, then create a Document Type for each type of document being archived.

Ensure that the Keyword Types assigned to each Document Type match the fields added to the page that will generate that Document Type.

## File Cabinets and Folders

If configured correctly, Folders are created automatically when a document with matching Keyword values is retrieved using an Application Client Connector (ACC) link, as long as no Folder currently exists for the document. If no documents with matching Keyword values exist in OnBase, a Folder is not created. When a Folder is created, all documents in OnBase that satisfy the configuration parameters of the Folder are added to it automatically.

---

**Note:** The user retrieving the document must have the permissions necessary to create Folders and retrieve the Document Type of the document in order for Folders to be created.

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Access Folders configuration by selecting **Folder Types** from the **Document** menu of the OnBase Configuration module.

1. Right click in the left-hand pane and select **New File Cabinet**. This is the file cabinet that will contain the folders for the documents archived using the enabled application.
2. The file cabinet shouldn't require any further configuration, but ensure that the following default options are selected on the **Settings** tab:
  - **Contents:** Folders Only
  - **Child Folder Manual Add Options:** Cannot Manually Add Child Folders

3. On the **User Groups** tab, select the User Groups that will have access to the new file cabinet.

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**Note:** It is not necessary to grant users User Group access to this file cabinet in order for them to access documents through ACC. In order to access documents through ACC, a user only needs permission to access the Folder Type to which the relevant documents are assigned.

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4. Click **Save**.

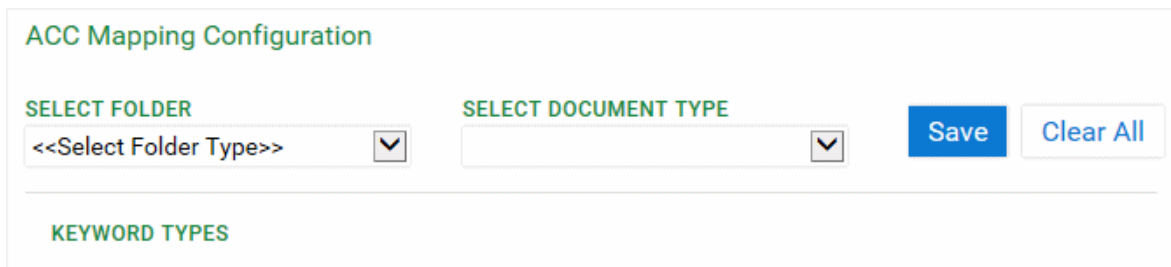
## Child Folders

1. Right click on the file cabinet you just created and select **New Child**. This folder will contain the Document Types archived using the enabled application.
2. Ensure that the following options on the **Settings** tab are selected for the child folder:
  - **Usage:** Client
  - **Contents:** Folders and Documents
  - **Contents:** Dynamic Document Types
  - **User Options:** User Creadable
  - **User Options:** User Searchable
  - **Child Folder Manual Add Options:** Cannot Manually Add Child Folders
3. On the **User Groups** tab, select the User Groups that will have access to the child folder.
4. On the **Keyword Types** tab, add the Keyword Types created for use with the enabled application that are present on the Document Types this folder will contain.
5. On the **Auto-Name** tab create an auto-name string for the folder.
6. On the **Display** tab, select icons for the folder.
7. On the **Parent Type** tab, ensure that the **Parent Folder Type** is set to the file cabinet you created.
8. On the **Auto-Folder** tab, add the Document Types created for use with the enabled application that are assigned to the documents this folder will contain.
9. Assign the **Auto-Folder Keywords** as required. You can also configure the Auto-Folder Keyword Types later by clicking the **Keyword Types** button.
10. Select **Auto-Folder Using this Keyword** for the Keyword Types created for the unique fields on the enabled pages. This allows Folders to be automatically created, if they do not already exist, when a document with a matching Keyword value is retrieved.
11. On the **Dynamic** tab, add the same Document Types as you did on the Auto-Folder tab.
12. Assign the same Keyword Types to the Document Types as you did on the Auto-Folder tab.
13. Click **Save**. Repeat these steps for each child folder you need to create.
14. Click **Close**.

## Application Client Connector Configuration

The user who is mapping the enabled application to OnBase must have administrative access to both OnBase and the enabled third-party application pages. In addition, the user must have the **Keyword Configuration** Configuration Right.

1. Log in to the third-party application and navigate to the enabled page. The search parameters entered don't matter as long as you can view the enabled page.
2. Click the button added to the page that enables the OnBase integration. This launches the OnBase Application Client Connector "puzzle piece" configuration page.



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**Note:** The initial connection to the Application Client Connector may take some time to be established. You may also be required to provide your OnBase login credentials to complete the connection.

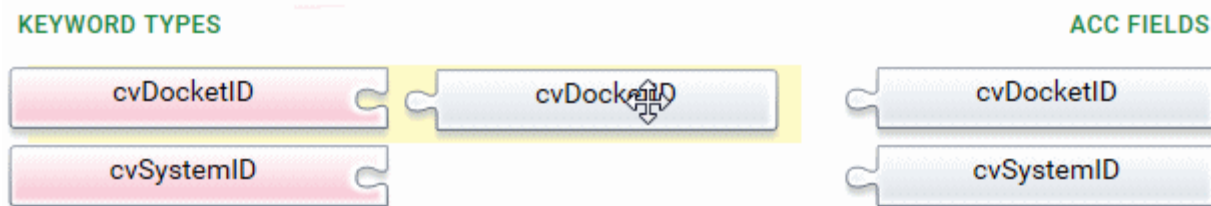
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If the Configuration page is not displayed, click the **Configuration** button in the main Application Client Connector toolbar:



3. From the **Select Folder** drop-down list, select the OnBase folder you created to contain the documents archived from this page.
4. From the **Select Document Type** drop-down list, select the OnBase Document Type you created for the documents archived from this page.
5. In the lower pane, select a field (represented by a "puzzle piece") from the **ACC Fields** column. The puzzle pieces in this column represent the fields and their values in the third-party application.

- Drag the selected field toward the **Keyword Types** column so that the yellow box is in line with the OnBase Keyword Type it corresponds to.

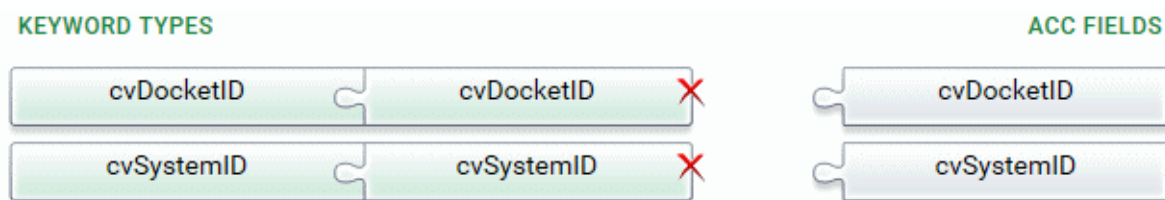


**Note:** Keyword Types that are part of a Multi-Instance Keyword Type Group are not available for mapping.

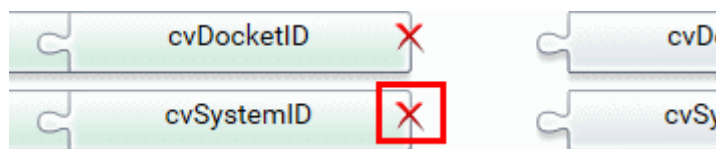
- Release the mouse button when the **ACC Field** puzzle piece is in line with the corresponding **Keyword Types** puzzle piece. The two puzzle pieces are connected, signifying that the value from the ACC field is used to populate the Keyword Type value in OnBase that it is connected to.

**Note:** For PeopleSoft enabled applications, do not map the **PeopleSoftID** field. This field is used by the system to identify the PeopleSoft page and keyword record that define the information for the puzzle pieces.

- Repeat the mapping process for each Keyword Type that needs to be mapped to an ACC field.



To remove a Keyword mapping, click the red **X** on the right edge of the ACC field puzzle piece.





9. After mapping all of the ACC fields to their corresponding OnBase Keyword Types, click the **Save Mappings** icon in the upper right corner of the page.

Save

To clear the current mappings, click the **Clear All Mappings** button.

Clear All

10. Repeat these steps for each Document Type you are configuring.

To access the configuration area later, click the **Configuration** button in the main Application Client Connector toolbar:



Additional configuration for the Application Client Connector is necessary, and depends on the OnBase integration module you are using. Consult the module reference guide for your OnBase integration module for specific configuration information regarding the Application Client Connector.

## System Interaction

The following module can be used to expand the functionality of your solution.

### Single Sign-On

The Integration for Single Sign-On can be used in conjunction with some LOB systems to expand your solution. For information on configuring Single Sign-On, see the **Legacy Authentication Methods** module reference guide.

## 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>.

**ADO.NET Connection Strings and ODBC Connections** — As of OnBase 18, the database connection method for the ACC Document Import Service is ADO.NET connection strings. The ACC Document Import Service no longer supports ODBC connections to connect to the OnBase database. If you are upgrading from version 17 or earlier, you must update your solution to use connection strings, either by running the ACC Document Import Service installer or by manually adding the connection strings to the configuration file for the service.

**Remove Old ActiveX Controls** — When upgrading your ACC solution, all preexisting ActiveX controls must be removed from all client workstations. To remove installed ActiveX controls from a workstation, perform one of the following actions:

- Run the installer (recommended)
- Remove the ActiveX controls manually by performing these steps:
  - a. Clear the temporary internet cache
  - b. Delete any DM or OBX files that exist on the workstation (check the **C:\Program Files\Hyland** directory, the **C:\Program Files\Hyland\Core** directory, and the **C:\Windows\System32** directory).
  - c. In the **Manage Add-ons** interface of Microsoft Internet Explorer, delete old ActiveX controls.
  - d. Verify that the registry no longer contains any DM- or OBX-prefixed references.

**Verify User Browsers** — OnBase browser support is updated for each release. Before upgrading your ACC solution, ensure that your users are working with browsers supported for version Foundation EP5.