OnBase®
Foundation EP5

EDI 835 EOB Processor

Reference Guide

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Copyright

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Overview

The EDI 835 EOB Processor provides the ability to process EDI 835 (4010, 4010A, or 5010) EOB data streams into individual documents and import them into OnBase.

EDI Standards

Electronic Data Interchange (EDI) is the electronic exchange of business data in standard formats. With EDI, organizations electronically exchange data between computer systems with little or no human intervention on either end.

Over 300 different EDI standards currently exist. Each standard represents one type of conventionally-printed document, and the standards are designed to function across organization and industry boundaries. By conforming to these standards, an organization greatly reduces its paperwork volume and increases its efficiency.

EDI standards are developed and maintained by the Accredited Standards Committee (ASC) X12. The ASC X12 committee was chartered by the American National Standards Institute specifically to develop uniform EDI standards.

Currently, OnBase is capable of processing data formatted as one of four EDI standards:

- **EDI 130 (Student Educational Records Data)**. Used to process EDI student educational record data sent from one educational institution to another into individual transcript documents.
- **EDI 810 (Invoice Data)**. Used to process EDI invoice data sent from a vendor to a customer into individual invoice documents.
- **EDI 835 (Explanation of Benefits - EOB - Data)**. Used to process EDI remittance data sent from an insurance carrier to a health-care provider into individual Explanations of Benefits documents
- **EDI 837 (Patient Claim/Encounter Data)**. Used to process EDI patient claim/encounter data sent from a health-care provider to an insurance carrier into a CMS 1500 (HFCA) or UB-04 form.

Note: Separate licensing is required for each of these EDI processors.

How the EDI 835 Processor Works

When an organization receives an EDI data file, the file is placed in a directory that is accessible to OnBase. An OnBase administrator is able to create and configure a process format to capture, parse and index this message into any number of documents that are then imported into OnBase. This process can be initiated manually by a user with the proper product rights or it can be scheduled to occur automatically during non-peak hours.

Information about each document is pulled directly from the data stream and is mapped to an OnBase Keyword Type, allowing all documents imported via the EDI 835 processor to be indexed automatically, free of user intervention.

Because the documents imported via the EDI 835 processor are XML-based, style sheets can be applied to them once they are imported into OnBase to display the data as desired. The same document can be viewed with a variety of style sheets; for example, one style sheet can be used for viewing the document and another used for printing the document. Style sheets can even be applied to a document based on one of the document's Keyword Values.

Additionally, the EDI 835 process format can be configured, based on your business needs, to also create an additional PCL rendition of each imported document that can be used for batch printing.

Business Benefits of the EDI 835 Processor

Some of the benefits of the EDI 835 processor are:

- A reduction in the time and cost of printing, filing, searching and retrieving documents. This increased efficiency frees employees to work on higher-value activities.
- Processing time is faster and indexing is more reliable than scanning and/or manually keying data. Paper documents can take days, or even weeks, to separate, file and index properly. Even EDI data files can take hours to manually separate; the EDI 835 processor automates this process and reduces to it a matter of minutes.
- Customer inquiries can be more quickly addressed, leading to higher customer satisfaction.
- Increased security and Health Insurance Portability and Accountability Act (HIPAA) compliance.
- Completely paperless processing and automated document indexing eliminates shipping costs and reduces, if not eliminates, the opportunity for lost or misplaced documents.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access EDI 835 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 3.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 3.

Simplified Licensing

In addition to a base package license for standard OnBase functionality, the Healthcare Claims Format Processor (Payor) add-on license is required to access standard EDI 835 functionality.

Legacy Licensing

The EDI 835 EOB Processor requires the EDI 835 EOB Processor (HIPAA 5010) license and a valid **Client** license.

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

A Note About EDI 835 Licensing Obtained Prior to OnBase 11.0

If your EDI 835 solution is licensed for **EDI 835 EOB Processor** (a license available for OnBase solutions prior to the release of OnBase 11.0), be aware that some changes have been made to how you will be able to process EDI 835 data in OnBase Foundation EP5:

If your OnBase solution is licensed only for the legacy EDI 835 EOB Processor license, not the new EDI 835 EOB Processor (HIPAA 5010) license:

- Workstations registered for the **EDI 835 EOB Processor** license can process EDI 835 4010 or 4010A EOB data, but they CANNOT process EDI 835 5010 EOB data.

If your OnBase solution is licensed for both the legacy EDI 835 EOB Processor license and the new EDI 835 EOB Processor (HIPAA 5010) license:

- Workstations registered for only the **EDI 835 EOB Processor** license CANNOT process ANY EDI 835 EOB data.
- Workstations registered for both the **EDI 835 EOB Processor** and the **EDI 835 EOB Processor (HIPAA 5010)** licenses can process EDI 835 4010, 4010A, or 5010 EOB data.
- Workstations registered for only the **EDI 835 EOB Processor (HIPAA 5010)** license can process EDI 835 4010, 4010A, or 5010 EOB data.

If your OnBase solution is licensed only for the new EDI 835 EOB Processor (HIPAA 5010) license, not the legacy EDI 835 EOB Processor license:

- Workstations registered for the **EDI 835 EOB Processor (HIPAA 5010)** license can process EDI 835 4010, 4010A, or 5010 EOB data.

Tip: It is considered a best practice to migrate any existing **EDI 835 EOB Processor** licenses to **EDI 835 EOB Processor (HIPAA 5010)** licenses. For more information, contact your solution provider.

EDI 835 EOB Processor

Installation Guide

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Requirements

The following sections outline requirement information specific to EDI 835 in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to EDI 835 and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Database Requirements
- Supported Desktop Operating Systems
- Microsoft .NET Framework Requirements
- General C++ Requirements
- Processing Workstation Minimum Hardware Requirements
- Miscellaneous Requirements
- Windows User Account Control Statement
- Data Execution Prevention

Licensing

See Licensing on page 2 for licensing requirements.

Pre-Installation

Sample Data

A sample file should be submitted to Hyland Software, Inc. to verify that files can be processed or determine if a pre-processor needs to be developed.

Preprocessors

Some import files may need to be preprocessed before they can be processed and the documents imported into OnBase. Preprocessing standardizes import files, translating them into useful formats that lend themselves easily to EDI 835 processing. Preprocessors are generated uniquely for the specific data file.

Contact your solution provider for more information on preprocessors.

Required Font Packages

Some EDI style sheets use the font Arial Narrow, so documents with these style sheets applied do not display correctly unless the font is installed. Arial Narrow is not an standard OS font, though it is commonly installed as part of other software such as Microsoft Office. Ensure that the workstations used to display documents have Arial Narrow installed.

Installation

No additional steps are required to install EDI 835.

Command Line Switches

-SCHED

Some process formats or jobs can be scheduled to run automatically. The -SCHED switch causes the Client to queue these scheduled process formats and jobs for later processing; if the machine running the OnBase Client in Scheduler mode (i.e., running the OnBase Client with the -SCHED command line switch applied) is also the processing workstation, then the process formats or jobs will run at their scheduled times.

In order for the scheduled process format or job to be run, OnBase must be running in Scheduler mode on the processing workstation. If OnBase is not running, or if OnBase is not running in Scheduler mode, then the scheduled processes will not run.

A process format or job can be scheduled from any OnBase Client workstation by a user with the proper rights.

See Scheduling on page 92 for more information.

INI Options

INI files are plain-text files that contain configuration information. These files are used by Windows and Windows-based applications to save information about your preferences and operating environment. The following settings can be configured in the onbase32.ini file:

[FilePaths]

TempParsePath

The path used to store a local copy of the EDI 835 input file, the working copy of the verification report, and the output file from a preprocessor (if used).

ReportPath

The path used to store the verification report while the process is running. If no **ReportPath** value is specified, the **TempParsePath** value is used.

[System]

CommitScript

The VBScript that will be used during the commit process.

When set to **0**, a VBScript will not be run during the commit process.

When set to a value greater than **0**, a VBScript will be run during the commit process. The value is the VBScriptnum for the VBScript that is to be run.

CompressMode

The type of compression that will be used in the system. Standard white space compression is not applicable to foreign character sets.

Values are:

Value	Definition
0	Not a valid compression type. No compression will occur.
1	Standard white space compression. Uses 100 high characters.
2	No compression. Data stored as Read Only.
3	International compression. Uses 10 high characters.

Note: After compression, the file must not exceed 2.2 GB.

DoubleStrikePreprocessor

When set to **0**, the preprocessor used to preprocess data that uses Double Strike characters will not be used.

When set to **1**, the preprocessor used to preprocess data that uses Double Strike characters will be used.

[Tuning]

ArchiveThreads

The maximum amount of concurrent archiving that can be performed, which allows for simultaneous processing. The number of threads specified is dependent on the workstation capacity (number of processors, processor speed, RAM, etc.). When this setting is unspecified or **0**, the result is standard processing.

EDIDocumentPerFile

When an EDI process runs, an XML (or PCL) file is generated and stored in a temporary location. Once the process completes, the file and documents brought into the system by the process are transferred from the temporary location to the appropriate disk group. Depending on the quantity of the documents processed into the system, the generated XML file can be large. Transferring this file over a network to the disk group can slow down network activity. The **EDIDocumentPerFile** setting splits up the XML file into multiple smaller files, improving transfer speed. The desired number of documents per XML file should be specified--NOT the desired number of XML files.

For example, if 480 documents are coming into the system, and 10 XML files should be created, **EDIDocumentPerFile** should be set at 48--NOT 10. The number of XML files equals the number of documents being processed divided by the number set in **EDIDocumentPerFile**.

When set to **0**, the EDI process will use the default behavior of generating one XML file for all documents imported.

QuickCompressAndCopy

The method by which the file to be parsed is copied and stored on both the local workstation and the file server. When set to **1**, the file should be simultaneously copied and compressed on both the local workstation and the file server. When set to **0**, the file will be copied to the local workstation.

Backup/Recovery

Backup

Configuration

The EDI 835 configuration is stored in the database. A proper backup of the database will contain all configuration information related to EDI 835 process formats (including style sheets and custom field codes) and the EDI 835 licenses.

Registry Settings

No registry settings apply to EDI 835 processing.

External Files

You will need to backup your onbase32.ini file.

Note: A backup of the EDI 835 import file(s) to be processed can be made by selecting the **Backup Path** check box in the **Process Settings For: <Process Format Name>** dialog box. See Preprocess Options on page 63 for more information.

Additionally, any import files that have not yet been processed that exist in the process format's Default Directory must be backed up.

Module-Related INI Options

Use the following chart to track your current onbase32.ini settings related to EDI 835:

Section	Setting	Current Value
FilePaths	TempParsePath	
	ReportPath	
System	CommitScript	
	CompressMode	
	DoubleStrikeProcessor	
Tuning	ArchiveThreads	
	EDIDocumentPerFile	
	QuickCompressAndCopy	

Preprocessors

Make a backup of any preprocessor used to preprocess your import file(s). The preprocessor settings are stored in the database, but the preprocessor executables are not.

Additional Steps

Run Configuration Reports after any new Disk Groups, Document Type Groups, Document Types or Keyword Types are configured for use with an EDI 835 process format.

Configuration reports detail the exact setup of items in the system. With this information, troubleshooting and communications with support are greatly improved. Additionally, Configuration Reports are stored in OnBase, so there will be a historical record of the system's structure and design.

Recovery

Configuration

All EDI 835 processor configuration information, including style sheet information and custom field code information, is stored in the OnBase database. Restoring the database will restore all EDI 835 processor configuration information.

Registry Settings

No registry settings apply to the EDI 835 processor.

External Files

Ensure that the onbase32.ini file is properly restored to its correct location.

The onbase32.ini file can be restored from the backup if the recovery machine is intended to be used for exactly the same purpose as the original machine. If this machine will be used for other modules, thorough testing may be required to ensure that there are no unintended consequences from adding/modifying INI settings on the existing workstation.

Additionally, any import files located in the Default Directory that have not yet been processed by an EDI 835 process format must be restored. If the import files are stored locally on the processing workstation, or if the machine where the import files were stored was also lost or taken offline, the directory structure, including the Default Directory, must be restored.

Module-Related INI Options

If your onbase32.ini file was not restored from a backup, you may need to manually reconfigure your onbase32.ini file with the correct settings for the EDI 835 processor. For a list of your EDI 835 processor-specific onbase32.ini options, see Module-Related INI Options on page 9.

Registration

Migrate the EDI 835 processor registration from the original processing workstation to the recovery workstation. The registration may need to be revoked from the original machine and then added to the recovery machine.

Preprocessors

Restore the preprocessor executables to the proper location.

Additional Steps

If necessary, use Configuration Reports from the restored OnBase solution to re-create the design and structure of your OnBase solution, including the configuration of any EDI 835 process formats.

If server that stored the import file prior to processing is taken offline, the folder structure of that server must be recreated exactly as it previously existed on the recovery machine, or the EDI 835 process formats must be modified to identify the correct Default Directory containing the EDI 835 import file.

Troubleshooting

Common Questions

Can you zoom in on files imported via EDI 835?

Users who view documents imported via EDI 835 in the OnBase Client cannot zoom in/out on the documents. Zooming in/out is supported only for image documents in the OnBase Client.

Documents imported via EDI 835 are converted to images when viewed in the OnBase Web Client so users are able to zoom in/out on them.

The EDI 835 option is not available as right-click option in OnBase Client. How can I get it?

Verify the workstation is registered for EDI 835.

If EDI 835 is not available, it is most likely not licensed at all in the database or another workstation is taking up the license. Simply browse through the licenses in Configuration (**Utils | Product Licenses**) to see if there are any workstations licensed/registered. Then in Client, select **Admin | User Management | Workstation Registration** from the menu bar. Select the workstation and then register that workstation for EDI 835.

There is an error copying to the temp path when processing EDI 835; what should I do?

Rename or delete the **parsing.ctx** and **ver_tmp** file and process again.

Why can't I create two EDI 835 processes using the same Document Type?

I am trying to create a new EDI 835 process using a Document Type that exists in another EDI 835 process. Why does the new process inherit the settings of the old process?

This is by design. In OnBase, a Document Type cannot be a part of two separate EDI 835 processes.

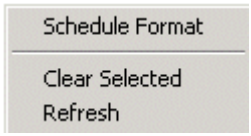
Incomplete Process Batches

To recover a process, several items must be verified. First, the cause of the incomplete process must be identified. In the processing workstation's temporary directory will be a file named **ver.tmp**. This file will contain the Verification Report from the process. This is the runtime Verification Report that will contain all of the information up until the point the process was interrupted. After reviewing the file, the incomplete batch can be opened in OnBase. The batch will display all of the documents that were processed in prior to the error. This can aid in determining the specific point where the process failed.

Scenario	Remedy
There are no documents in the batch.	This means that a file was not processed. The error may have occurred while getting the file from its location or communicating to the database.
Documents from one file are processed partially.	Again, this could be an issue with the database communication. Also, it could be an error with the file. By finding the last document in the system and then reviewing the file just after that point, the area of failure can be found. If the file no longer exists at this point, it can be found in the temporary processing directory (the location of this can be determined in the Client module, by selecting **User | Workstation Options**) as **parsing.ctx**.
Documents have been completely processed from one file, but not from the next file in the process.	This could mean that the next file has issues with the formatting. Or, again, it could have been a database / network issue.

Common Errors

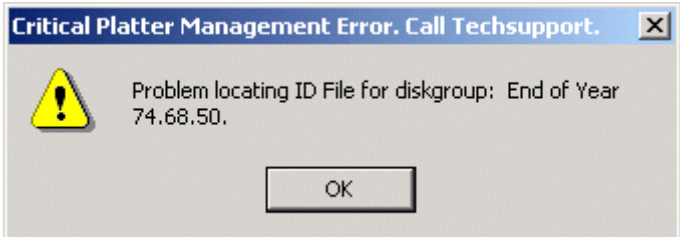
Product Licensing and Registration Errors



Probable Causes	Remedy
The workstation has not been registered for processing with EDI 835.	Select EDI 835 at the **Products Registered for Workstation** dialog box in Client/Administration/ Workstation Registration and click **Register**.

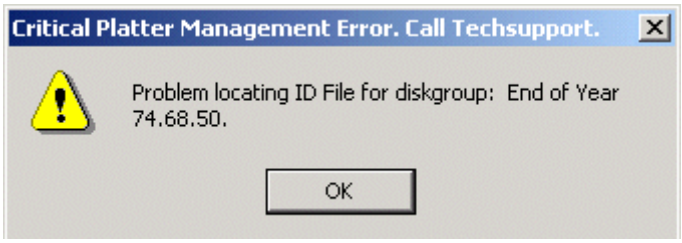
Probable Causes	Remedy
The current user has no Product Rights assigned for the EDI 835.	Enable the EDI 835 check box in the **Product Rights** dialog box (User Groups and Rights).

Disk Group Not Found



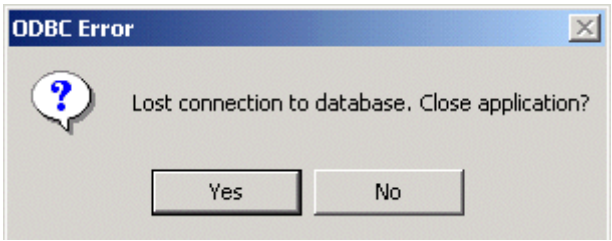
Probable Causes	Remedy
The Mass Storage copy of the file is not where it should be. **The Disk Group has been physically relocated on the network.** **Network Security conflicts.**	Edit the Platter Path specified in the Disk Group's Volume Information dialog box to reflect the new location.
The Disk Group remains in its original location, but the Platter Path specified in the Disk Group's Volume Information dialog box has been changed.	Edit the Platter Path specified in the Disk Group's Volume Information dialog box to reflect the new location.
The Disk Group has been deleted.	Replace a Backup of the Disk Group at the location specified in the Process Settings of the process format.

Maximum Volumes Reached



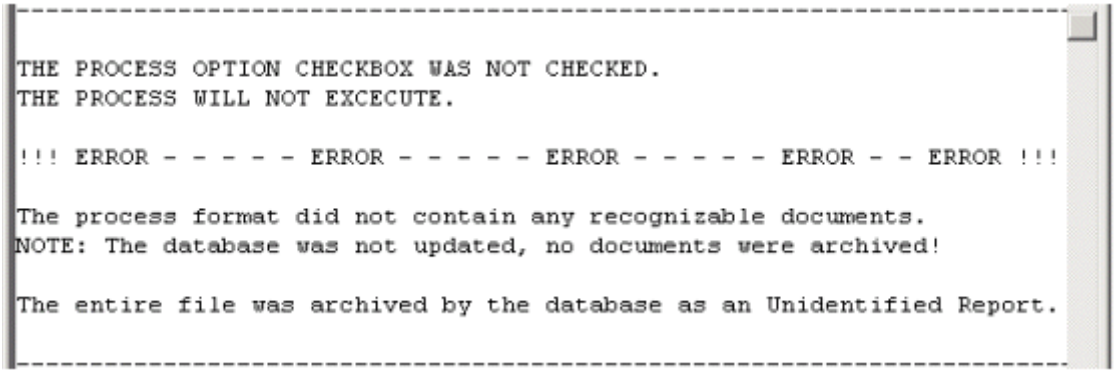
Probable Causes	Remedy
The number of "online" volumes defined for the first mass storage copy has been reached.	Backup, then delete one of the volumes in the Disk Group, or increase the allowable number of online copies for the Disk Group at the **Disk Group Settings** dialog box. **Note:** The new setting will not take effect until the next volume is created (If necessary, you may have to force promote the current volume).

Database Connection Errors



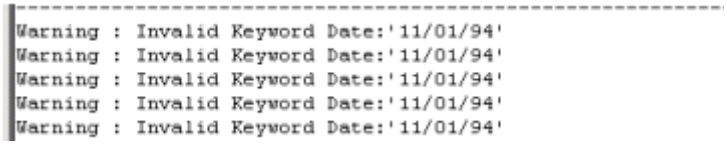
Probable Causes	Remedy
The database has been shut-down or the connection has been lost during processing.	Close the OnBase Client module by clicking **Yes**. Then either restart the workstation (to enable the connection), or contact the System Administrator to restart the database.

Verification Report Errors - Process Option Disabled



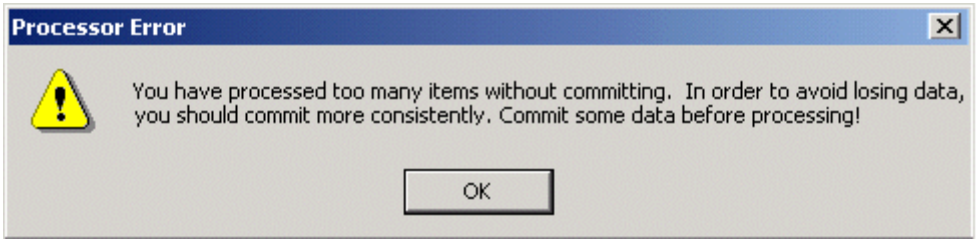
Probable Causes	Remedy
When the EDI 835 process was configured, the Run Process check box in the Process Settings For: <Process Format Name> dialog box) was disabled.	Edit the process format's configuration and select the **Run Process** check box.

Verification Report Errors - Unformatted Date Keyword



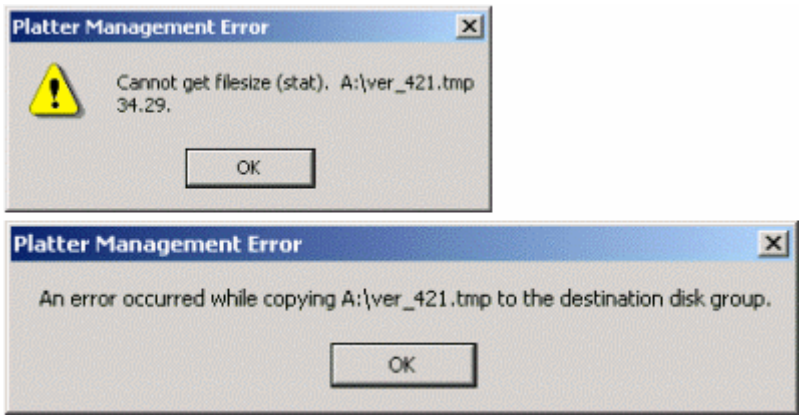
Probable Causes	Remedy
The Date Keyword was not formatted (or was formatted improperly) for the process format.	Select the Date Keyword assigned to the process format and click **Format**. Supply parameters that correspond to the formatting used in the import file.

Maximum Items in Queue



Probable Causes	Remedy
The number of batches in the Awaiting Commit queue exceeds the number allowed by the system.	Commit or delete some of the batches in the **Awaiting Commit** queue. Or, to allow your solution to accept a larger number of uncommitted batches, from the OnBase Configuration module, click **Import** | **Process Setting** and enter the maximum number of uncommitted batches to be allowed. **Tip:** It is considered a best practice to keep the maximum number of uncommitted batches as low as possible. Documents in uncommitted batches are stored only in the mass storage copy of the Disk Group and could be lost if this disk was damaged or if it was to fail.

Parse File Settings



Probable Causes	Remedy
Not enough space exists in the directory used to temporarily store processed data, prior to moving the data to the designated Disk Group.	Provide more room at the designated temporary directory, or change the destination for the temporary directory by editing the following line in the onbase32.ini file: **TempParsePath=**

File Collisions

Probable Causes	Remedy
When a process is initiated, the system will check in the database to figure out what the next file should be named, such as 105.ctx. When it gets the name, it bumps that number up in the database, so the next file will be 106.ctx, etc. If an older database is restored, the older database will think that the next file should be 105.ctx. However, that file already exists in the Disk Group directory (processed via the pr-existing database), so file collision will occur. **No Disk Group is assigned to the Document Type configured in the EDI 835.**	Locate and remove all extraneous files, and/or Force Promote the Disk Group(s).

Missing Data - Currency Keyword Values Not Populated for Document

Probable Causes	Remedy
The currency Keyword Type was not formatted correctly.	Select the Currency Keyword Type in the process format configuration and click **Format**. Supply parameters that correspond to the formatting used in the import file.

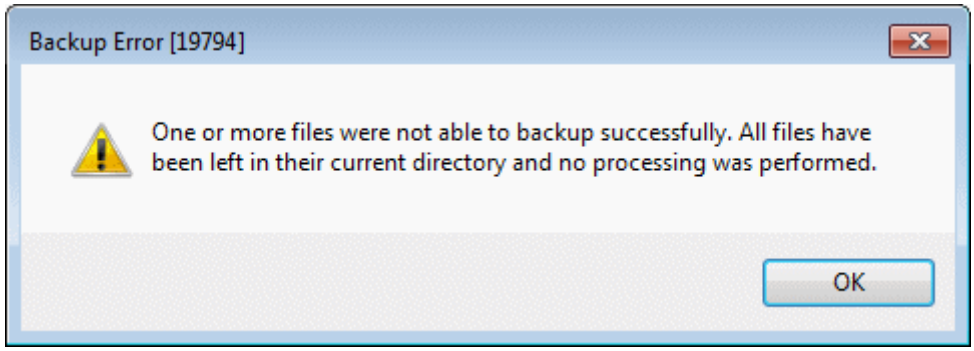
Missing Data - Date Keyword Values not Populated for Document

Probable Causes	Remedy
The Date Keyword Type was not formatted (or formatted improperly).	Select the Date Keyword Type in the process format configuration and click **Format**. Supply parameters that correspond to the formatting used in the import file.

Documents Are Not Displayed Correctly in OnBase Web Client

Probable Causes	Remedy
Incorrect display of spaces when viewing documents with web client. Characters appear instead of spaces.	Change UTF-8 setting in Microsoft Internet Explorer. **Tools	Internet Options	Advanced Tab**. Check the box next to **Always send URLs as UTF-8 (requires restart)**

Cannot Back Up Files



Probable Causes	Remedy
The Backup Path option is enabled but the processing workstation is unable to access the configured Backup Path. This can happen if the processing workstation is unable to access the configured file path, or if the Backup Path field was left blank during configuration.	Ensure that a **Backup Path** has been configured within OnBase Configuration, and make sure that the processing workstation is able to access the configured path.

Common Issues

Some XML documents are not being displayed correctly.

Beginning in Microsoft .NET Framework 2.0, the **XslTransform** class was deprecated and replaced with a new XSLT implementation, **XslCompiledTransform**. This change to the Microsoft .NET Framework enforced stricter standards for how style sheets must be created, and may cause display issues when viewing XML documents in OnBase with style sheets that do not conform to these stricter standards. For example, XML documents may be displayed as shifted down and to the right, or other unexpected behavior may occur when viewing documents with the affected style sheets.

Beginning with OnBase 9.0, this issue has been corrected for all custom and standard style sheets created by Hyland Software, including style sheets for the EDI processors. However, this issue may still affect style sheets created by Hyland Software prior to the release of OnBase 9.0, as well as any style sheets that users have developed on their own, depending on how they were created.

If you are upgrading from OnBase 8.2 or earlier, or if you believe that style sheets created for your OnBase solution are, or may be, affected, please contact Hyland Software's Technical Support for additional information and assistance in resolving this issue.

Segment Terminators in the EDI Data Stream

The EDI standard states that the segment terminator is the byte following the 105th byte. It is usually the tilde (**~**) character.

Per the EDI standard, a segment terminator is not a required field. OnBase can recognize a segment terminator, but if one does not exist then a valid suffix (i.e., CR, LF, or CR\LF) in the 106th byte can be used to correctly identify documents. Or, if this character is left blank, you can use a line feed to indicate a segment terminator.

In most files, when the segment terminator is explicitly defined, line feeds still appear but strictly for formatting/readability purposes.

Documents imported via the EDI processors are not being printed with the Print style sheet applied.

In order to print any OnBase XML document with the **Print** style sheet applied, the document must be printed using the OnBase print logic (i.e., from the OnBase **Print** dialog box). Depending on how the printing action was initiated, HTML/XML-based documents may display the Internet Explorer **Print** dialog box instead of the OnBase **Print** dialog box.

For information steps you can take to ensure the OnBase **Print** dialog box is displayed when initiating most printing actions from HTML/XML-based documents, see Print Logic for HTML Documents in the System Administration documentation.

EDI field code values are being truncated when mapped to OnBase Keyword Types and imported as Keyword Values.

When the value represented by the EDI field code exceeds the maximum configured length of the OnBase Keyword Type it is mapped to, then the value is truncated so that the Keyword Value consists of the maximum number of characters allowable for the Keyword Type.

When a Keyword Value is truncated, a warning message is displayed in the Verification Report.

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.

The following default field codes have been configured and included for the EDI processors. Additional field codes can be manually created and configured; for information on manually creating and configuring field codes, see Creating EDI 835 Field Codes on page 47.

EDI 130 Processor

The following default field codes are automatically created and configured for OnBase:

Student First Name Student Last Name Student Middle Name School Name Test Name Test Date	Subtest Name Test Score Credit Hours Attempted Credit Hours Earned Academic GPA Class Rank	Degree Title Course Name Course Number Course Academic Grade Course Credit Hours Earned Course Credit Hours Attempted

EDI 810 Processor

The following default field codes are automatically created and configured for OnBase:

Invoice Date Invoice Total Invoice Number Purchase Order Number Due Date	Product Description Transaction Type Code Number of Line Items Customer Order Number Bill-to-Party	Supplier/Manufacturer Ship To

EDI 835 EOB Processor

The following default field codes are automatically created and configured for OnBase:

Patient Account Number Total Billed Amount Total Benefit Amount Patient Responsibility Claim Number Patient Name - First Patient Name - Middle Patient Name - Last Patient ID Insured Name - First	Insured Name - Middle Insured Name - Last Insured ID Provider Name - First Provider Name - Middle Provider Name - Last Provider ID Claim Date - Start Claim Date - End Payment Number	Payment Date Payer Name Payer ID Payee Name Taxpayer ID Service Line Benefit Amount Service Line Date - Start Service Line Date - End Claim Adjustment Reason Code Service Line Adjustment Reason Code

EDI 837 Processor

The following default field codes are automatically created and configured for OnBase:

Institutional

1. Provider Name	19. Type of Admission	80. Principal Procedure Code
3. Patient Control Number	20. Source of Admission	80. Principal Procedure Date
4. Type of Bill	22. Patient Status	82. Attending Physician ID
6. Statement Covers Date - Begin	50. Payer Name	82. Attending Physician Name - Last
6. Statement Covers Date - End	51. Provider Number	82. Attending Physician Name - First
7. Covered Days	54. Prior Payments	82. Attending Physician Name - Middle
8. Non-Covered Days	54. Patient Prior Payments	83. Operating Physician ID
9. Coinsurance Days	55. Estimated Amount Due	83. Operating Physician Name - Last
10. Lifetime Reserve Days	55. Patient Estimated Amount Due	83. Operating Physician Name - First
12. Patient's Name - Last	58. Insured's Name - Last	83. Operating Physician Name - Middle
12. Patient's Name - First	58. Insured's Name - First	83. Other Provider ID
12. Patient's Name - Middle	58. Insured's Name - Middle	83. Other Provider Name - Last
13. Patient's Address - Street	60. CERT. - SSN - HIC. - ID NO.	83. Other Provider Name - First
13. Patient's Address - City	61. Group Name	83. Other Provider Name - Middle
13. Patient's Address - State	62. Insurance Group Number	83. Referring Provider ID
13. Patient's Address - Zip	63. Treatment Authorization Codes	83. Referring Provider Name - Last
14. Patient's Date of Birth	67. Principal Diagnosis Codes	83. Referring Provider Name - First
15. Patient's Sex	76. Admitting Diagnosis Codes	83. Referring Provider Name - Middle
17. Admission Date & Hour	77. E-Code	Clearinghouse Trace Number
		Original Reference Number

Professional

1. Claim Type	9B. Other Insured's Date of Birth	23. Prior Authorization #
1A. Insured's I.D. Number	9B. Other Insured's Sex	25. Federal Tax I.D. Number
2. Patient's Name - Last	9D. Other Insured's Plan or Program Name	26. Patient Account #
2. Patient's Name - First	10. Patient's Condition Related To:	27. Accepted Assignment
2. Patient's Name - Middle	11. Insured's Policy or Group #	28. Total Charge
3. Patient's Date of Birth	11A. Insured's Date of Birth	29. Amount Paid
3. Patient's Sex	11A. Insured's Sex	30. Balance Due
4. Insured's Name - Last	11C. Insured's Plan or Program Name	31. Physician's or Supplier's Signature on File
4. Insured's Name - First	12. Patient's Signature on File	32. Facility Name
4. Insured's Name - Middle	13. Insured's Signature on File	32. Facility Address - Street
5. Patient's Address - Street	14. Date of Current Illness	32. Facility Address - City
5. Patient's Address - City	15. Date of Similar Illness	32. Facility Address - State
5. Patient's Address - State	16. Date Unable to Work - Begin	32. Facility Address - Zip
5. Patient's Address - Zip	16. Date Unable to Work - End	33. Billing Name
6. Patient's Relation to Insured	17. Referring Physician's Name - Last	33. Billing Address - Street
7. Insured's Address - Street	17. Referring Physician's Name - First	33. Billing Address - City
7. Insured's Address - City	17. Referring Physician's Name - Middle	33. Billing Address - State
7. Insured's Address - State	17A. Referring Physician's I.D. Number	33. Billing Address - Zip
7. Insured's Address - Zip	18. Hospitalization Date - Begin	33. Pin #
9. Other Insured's Name - Last	18. Hospitalization Date - End	33. Group #
9. Other Insured's Name - First	20. Outside Lab Charges	Clearinghouse Trace Number
9. Other Insured's Name - Middle	21. Diagnosis Code	First Service Date
9A. Other Insured's Policy or Group #	22. Medicaid Resubmission - Original Reference #	

EDI 835 EOB Processor

Administration Guide

Foundation EP5

The EDI 835 processor is configured in the OnBase Configuration module. Concepts discussed in this chapter assume a general knowledge of basic configuration terms and procedures associated with both the EDI 835 standard and OnBase.

For general OnBase configuration information, see the **System Administration** documentation.

Prerequisites

Prior to configuring the EDI 835 processor, the following prerequisite steps must be taken:

- **Create an EDI 835 data file.** The EDI 835 processor cannot process files that use file separators as the segment delimiter.
- **Create the XML Style Sheet**. The EDI 835 processor parses EDI 835 data files into XML-based documents that require an XML style sheet for proper viewing. Create and configure one or more XML style sheets that are available to the workstations that are used to view these documents.

Tip: This location could be on a web server, a file share, or local workstations.

- **Configure Disk Groups**. The Disk Group that the documents imported via the EDI 835 processor will be stored in needs to be configured.
- **Create Keyword Types**. The OnBase Keyword Types that are to contain metadata about the documents being imported need to have been created.
- **Create Document Type Groups**. The Document Type Groups that the documents imported via the EDI 835 processor will be stored in need to have been created.

- **Create Document Types**. The Document Types that the documents imported via the EDI 835 processor will be stored as need to have been created and configured according to the steps listed below:
  - **Assign a Default File Format of XML**. The Document Type should be given a Default File Format of **XML**. See below for more information on configuring a Document Type for XML documents.
  - **Assign All Necessary Keyword Types**. All Keyword Types that are to be associated with the Document Type should be assigned prior to configuring the EDI 835 processor.
  - **Assign the XML Style Sheet**. Enter the full path to the location of the .XSL files that are to be used as both the **View** and **Print** style sheets.
  - **Configure the Document to Allow Multiple Renditions**. If you will also be creating PCL renditions of the documents being imported via the EDI 835 processor, you must configure the Document Type to allow multiple renditions.

Tip: It is recommended that you name your OnBase Keyword Types to easily associate them with the standard EDI Field Names. For example, if a Field Name is **Claim Number**, name the Keyword Type **EDI Claim Number**.

Keyword Considerations for the EDI 835 Processor

When creating/configuring an EDI 835 process format, be aware of the Keyword configuration of the Document Type that the process format is using for the documents it imports.

Consider how the EDI 835 processor works with the following Keyword configurations:

Multi-Instance Keyword Type Groups

The EDI 835 processor supports the use of Multi-Instance Keyword Type Groups, given that data in the EDI data stream is structured properly.

To use Multi-Instance Keyword Type Groups with the EDI 835 processor, you must ensure that:

- Multi-Instance Keyword Type Groups have been created and assigned to the Document Type assigned to the EDI 835 process format.
- The EDI data stream is structured so that the Keyword Values that will compose an instance of the Multi-Instance Keyword Type Group appear in the correct order in the data stream.

For example:

A Multi-Instance Keyword Type Group containing Keyword Values for **Patient First Name**, **Patient Middle Name**, and **Patient Last Name** is assigned to the Document Type assigned to your EDI 835 process format

The EDI 835 processor knows exactly which field codes found in the data stream to map to the **Patient First Name**, **Patient Middle Name**, and **Patient Last Name** Keyword Values. However, in order to maintain the relationship between the Keyword Values, the

field codes representing these Keyword Values must be found, in order, in the EDI data stream.

When processing an import file, the EDI 835 processor identifies the following values in the EDI data stream:

```
John, Quincy, Adams, Dwight, David, Eisenhower
```

Based on the configuration of the Multi-Instance Keyword Type Group, two complete instances are created:

	Instance 1	Instance 2
Patient First Name	John	Dwight
Patient Middle Name	Quincy	David
Patient Last Name	Adams	Eisenhower

Tag Keywords

Depending on the mapping you configure between the EDI field code and the OnBase Keyword Type when configuring the EDI 835 field order (see Configuring the EDI 835 Field Order on page 75 for more information), some Keyword Types may be configured to be Tag Keywords.

When Keyword Types are configured as Tag Keywords, the Keyword Values assigned to those Keyword Types are added to all instances of the Multi-Instance Keyword Type Group.

For example:

A Multi Instance Keyword Type Group containing **Medical Record Number**, **Patient Name**, **Account Number**, **Facility**, and **Department** is configured for the Document Type associated with the EDI 835 process format, and the **Patient Name** and **Medical Record Number** Keyword Types have been configured as Tag Keywords in the EDI 835 process format's field order.

When processing an import file, the EDI 835 processor identifies the following values in the EDI data stream:

```
John Quincy Adams, 0123456789, 1111, Hyland Hospital - Main Campus,
Radiology, 2222, Hyland Hospital - Clemens Outpatient Clinic,
Emergency Medicine
```

Based on the configuration of the Multi-Instance Keyword Type Group, the following instances are created:

	Instance 1	Instance 2
Patient Name	John Quincy Adams	John Quincy Adams
Medical Record Number	0123456789	0123456789
Account Number	1111	2222

	Instance 1	Instance 2
Facility	Hyland Hospital - Main Campus	Hyland Hospital - Clemens Outpatient Clinic
Department	Radiology	Emergency Medicine

Note that although the fields mapped to the **Patient Name** and **Medical Record Number** Keyword Types appeared only once in the data stream, the values were captured and added to both instances of the Multi-Instance Keyword Type Group.

Missing Keyword Values

If any values in the data stream are missing, the instances of the Multi-Instance Keywords are created as expected and only the missing data is excluded.

For example:

When processing an import file, the EDI 835 processor identifies the following values in the EDI data stream:

```
John, Adams, Dwight, David, Eisenhower
```

Note in the sample data above, the **Patient Middle Name** value is missing for the **John Quincy Adams** patient data.

Based on the configuration of the Multi-Instance Keyword Type Group, two instances are created:

	Instance 1	Instance 2
Patient First Name	John	Dwight
Patient Middle Name		David
Patient Last Name	Adams	Eisenhower

Incorrectly-Ordered Keyword Values

If the values in the data stream are out of order, the instances of the Multi-Instance Keyword Type Group are not created as expected.

For example:

When processing an import file, the EDI 835 processor identifies the following values in the EDI data stream:

`John, Adams, Quincy, Dwight, David, Eisenhower`

Note in the sample data above, the positions of the **Patient Middle Name** and **Patient Last Name** values have be reversed for the **John Quincy Adams** patient data.

Based on the configuration of the Multi-Instance Keyword Type Group, three instances are created:

	Instance 1	Instance 2	Instance 3
Patient First Name	John		Dwight
Patient Middle Name		Quincy	David
Patient Last Name	Adams		Eisenhower

Multiple Keyword Values of One Keyword Type

There are two ways to identify multiple Keyword Values for one Keyword Type per document imported via the EDI 835 process: The method you select depends on how your EDI data stream is structured:

- **Values that are to be stored as Keyword Values for one Keyword Type are found only in one tag (and multiple instances of the tag are present for a document)**. Each time the tag is identified, the value found within the tag is stored as a Keyword Value (provided the values are unique; duplicate values are ignored). This requires only one Field Code to be configured and mapped to the desired Keyword Type.
- **Values that are to be stored as Keyword Values for one Keyword Type are found in multiple tags (and one or multiple instances of the tag are present for a document)**. A unique Field Code must be configured for each tag. This requires as many custom Field Codes to be created as the maximum number of Keyword Values that may be present for the Keyword Type (for more information on creating custom field codes, see Creating EDI 835 Field Codes on page 47). Once created, each of these Field Codes must then be mapped to the desired Keyword Type.

Document Type XML Configuration

Style sheets are used with XML documents to define the appearance of the data in the document. The purpose of the style sheet is to allow a single XML document to be re-targeted for different usages and audiences.

Within OnBase, you can assign different style sheets to a Document Type to change the appearance of the document depending on how its being used or viewed. These options are located in the **XML Style Sheet Settings** dialog box.

If the **Keyword-Based XML** check box is enabled in the **Document Type Settings** dialog box, OnBase automatically selects a style sheet for the document based on a specified Keyword Value.

When creating an XML style sheet there are few things that are important to note:

- The style sheet must be accessible to the user and the workstation that the document is being viewed from via a UNC or URL path.
- If the style sheet includes images, the style sheet must include the full path (via a UNC or URL) to the image file.

  If the document is intended to be distributed via e-mail, images in the style sheet must be available via a URL.
- If a style sheet is referenced in the XML file and it does not match the style sheet configured in OnBase, the style sheet specified in OnBase overrides the style sheet specified in the XML file.
- If viewing the XML document in the OnBase Web Client, the style sheet must use UTF-8 encoding.

Note: It is recommended that the following line be placed below the XML declaration in the style sheet to ensure proper viewing:
```
<!DOCTYPE xsl:stylesheet [ <!ENTITY nbsp " "> ]>
```
An example of an XML declaration is:
```
<?xml version="1.0" encoding="UTF-8" ?>
```

- Stylesheets that use an **<xsl:include>** tag are not supported by default, in order to ensure the highest level of security. While it is not recommended to reference external .xsl files, if your solution requires it, you can override this security feature by using the **AllowInsecureExternalXsl** key and set it to **true**. This key must be placed in the Application Server's web.config configuration file under the **appSettings** node.
  ```
  <add key="AllowInsecureExternalXsl" value="true" />
  ```

An **835Config.xml** file is provided for your use along with the rest of your solution files. If you need to customize or update the **Adjustment** or **Remark** codes used by the provided xml file, reference the **ReadMe_835.doc** file provided along with the **835Config.xml** file. Contact your solution provider if you have any questions about the **835Config.xml** file or how to modify it.

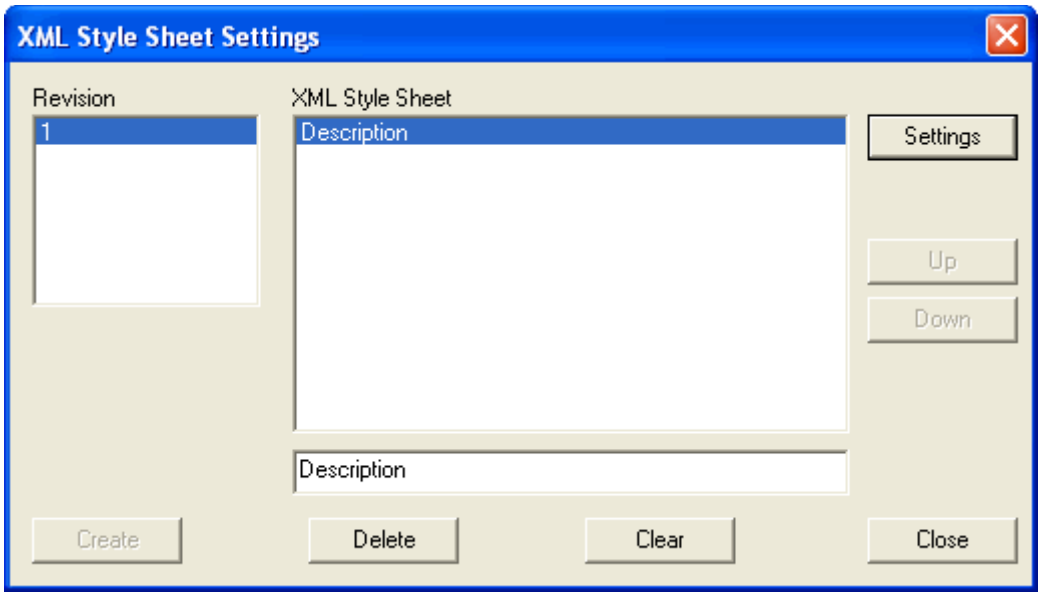
Associating XML Style Sheets at the Document Type Level

You can associate multiple style sheets with a single Document Type, providing the you with the ability to select the style sheet they want to use when viewing, printing or e-mailing the document.

To associate a style sheet with a Document Type:

1. From the OnBase Configuration module, click **Document | Document Types**. The **Document Types** dialog box is displayed.
2. Select the Document Type you would like to configure the style sheet for from the Document Type list and click **XML Style Sheet**.

   The **XML Style Sheet Settings** dialog box is displayed.



Note: The **XML Style Sheet Settings** dialog box will include fields for Keyword configuration if you selected **Keyword-Based XML** in **Document Type Settings**. If this option was selected, the style sheet used when viewing, printing and e-mailing documents is based on the document's Keyword Values. See Associating XML Style Sheets by Keyword Value for more information on how to configure these style sheets.

A Document Type that is associated with XML documents should have at least one style sheet configured for it. Each style sheet has the ability to associate two .XSL files with it:

- One used when viewing documents.
- One used when printing documents.

Note: Depending on your configuration, you may have the option to select an alternate style sheet from an open document.

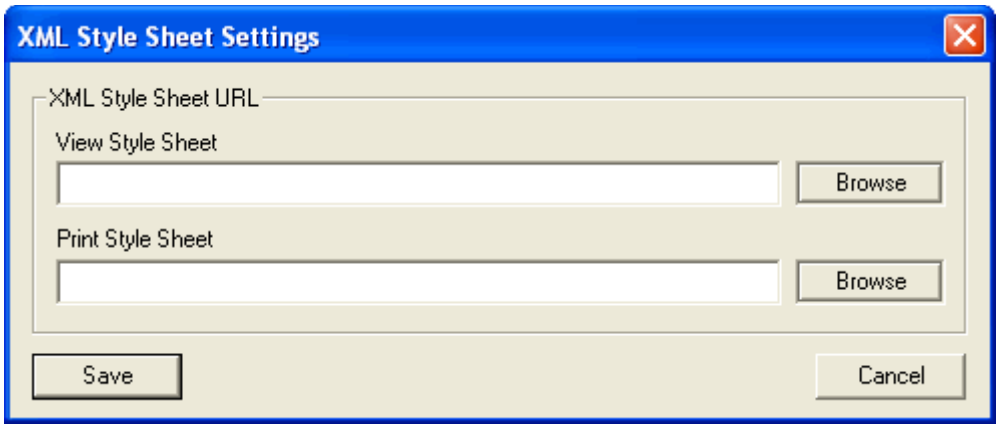
3. In the **Revision** list, select the Document Type's revision number that is to be associated with this style sheet. If revisions are not configured for the Document Type, select **1**.

Tip: OnBase allows you to assign different style sheets to different revisions of the document to account for changes in the appearance of the document, such as if a style sheet is modified or updated.

If a user attempts to view a revision of the Document Type that has not been assigned a style sheet, OnBase uses the style sheet assigned to latest previous revision that was assigned a style sheet.

For example, if you are viewing the 5th revision of a document, but this revision has not been assigned a style sheet, OnBase will check the 4th revision for a style sheet to use. If the 4th revision is not assigned a style sheet, OnBase will check the 3rd revision, etc. until it finds a revision with an assigned style sheet. If no style sheet is associated with any revision of the Document Type, the raw XML data is displayed.

4. Enter the name of the new style sheet in the **New Style Sheet** data entry field.
5. Click **Create**. The **XML Style Sheet URL** dialog box is displayed.



6. In the **View Style Sheet** field, browse to or enter the full path to the .XSL file that is to be associated with the document when it is viewed. This path must be a UNC or URL to which the user has access from the workstation the document is being viewed from.
7. In the **Print Style Sheet** field, browse to or enter the full path of the .XSL file that is to be associated with the document when it is printed. This path must be a UNC or URL to which the user has access from the workstation the document is being viewed from.
8. Click **Save**. The **XML Style Sheet Settings** dialog box is closed.

   The style sheet is added to the XML Style Sheet list in the **XML Style Sheet Settings** dialog box.

   To disassociate a style sheet with a Document Type, select it in the XML Style Sheet list and click **Delete**.
9. Repeat Steps 3-8 for each style sheet you want to create.

Note: The first style sheet in the XML Style Sheet list is the default style sheet.

10. When you are finished configuring style sheets, click **Close**.

Associating XML Style Sheets by Keyword Value

OnBase can assign a style sheet to your document based on a Keyword Value assigned to the document.

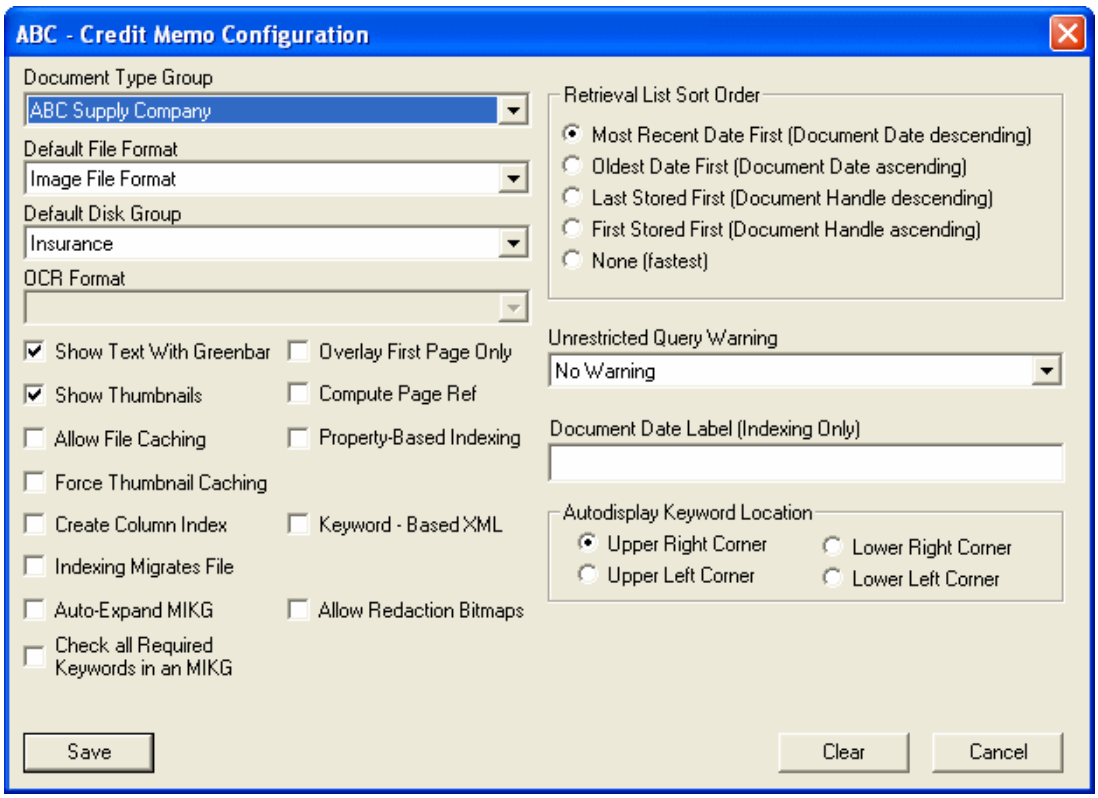
For example, an Accounts Receivable department prints and mails color-coded invoices depending on how past due an invoice is. To enable this, they added a **Status** Keyword Type with four different possible Keyword Values (e.g., **Current**, **30 Days Past Due**, **60 Past Due**, **90 Days Past Due**) and configured the Document Type to use a different style sheet depending on the **Status** Keyword Value. The style sheet assigned to the document controls the color it is printed in.

To associate a style sheet with a document based on a Keyword Value:

1. From the OnBase Configuration module, click **Document** | **Document Types**. The **Document Types** dialog box is displayed.
2. Select the Document Type to be configured from the Document Type list and click **Settings**.

Tip: Use the Document Type Group drop-down to filter the Document Types list to only contain the Document Types associated with the selected Document Type Group.

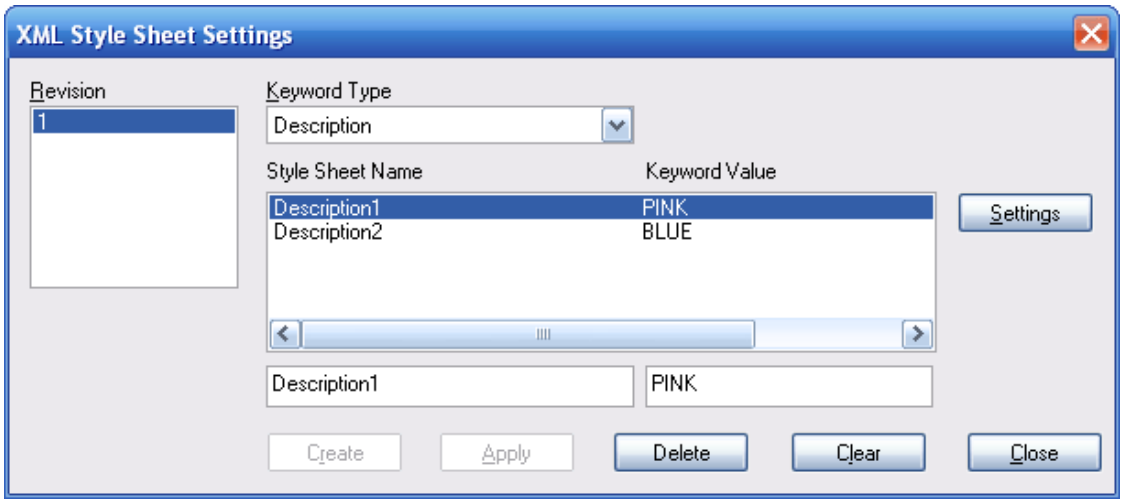
The **<Document Type Name> Configuration** dialog box is displayed.



3. Select the **Keyword-Based XML** check box and click **Save**. The **<Document Type Name> Configuration** dialog box is closed and you are returned to the **Document Types** dialog box.

4. With the Document Type to be configured still selected in the Document Type list, click **XML Style Sheet**.

   The **XML Style Sheet Settings** dialog box is displayed.



Note: If the **Keyword-Based XML** check box was not selected for the Document Type, the **XML Style Sheet Settings** dialog box does not contain fields for Keyword configuration and the style sheet applied to the document is determined by the Document Type. See Associate XML Style Sheet by Document Type above for more information on how to configure these style sheets.

A Document Type that is associated with XML documents should have at least one style sheet configured for it. Each style sheet has the ability to associate two .XSL files with it:

- One used when viewing documents.
- One used when printing documents.

Note: Depending on your configuration, you may have the option to select an alternate style sheet from an open document.

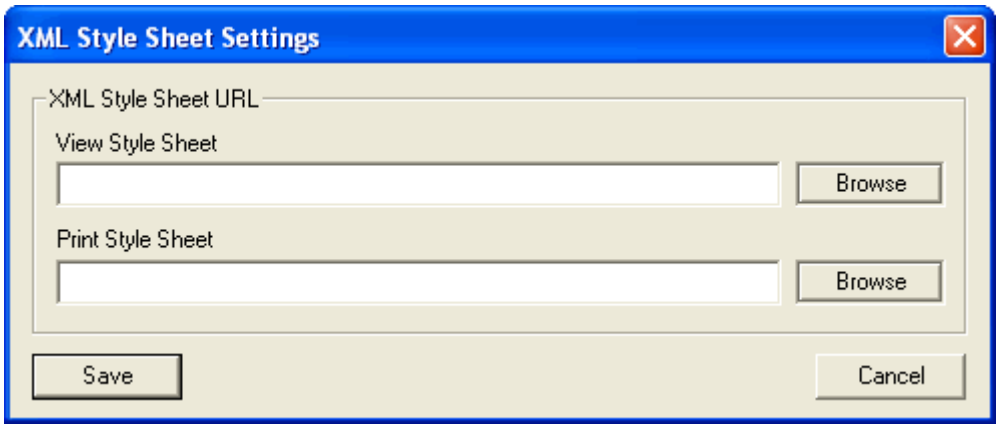
5. In the Revision list, select the Document Type's revision number that is to be associated with this style sheet. If revisions are not configured for the Document Type, select **1**.

Tip: OnBase allows you to assign different style sheets to different revisions of the document to account for changes in the appearance of the document, such as if a style sheet is modified or updated.

   If a user attempts to view a revision of the Document Type that has not been assigned a style sheet, OnBase uses the style sheet assigned to latest previous revision that was assigned a style sheet.

   For example, if you are viewing the 5th revision of a document, but this revision has not been assigned a style sheet, OnBase will check the 4th revision for a style sheet to use. If the 4th revision is not assigned a style sheet, OnBase will check the 3rd revision, etc. until it finds a revision with an assigned style sheet. If no style sheet is associated with any revision of the Document Type, the raw XML data is displayed.

6. Using the **Keyword Type** drop-down, select the Keyword Type that is to control the style sheet that is to be applied to the document.
7. In the **Keyword Value** field, enter the Keyword Value that is to be associated with a style sheet.
8. In the **Style Sheet Name** field, enter a name for the new style sheet.
9. Click **Create**. The **XML Style Sheet URL** dialog box is displayed.



10. In the **View Style Sheet** field, browse to or enter or the full path to the .XSL file that is to be associated with the document when it is viewed. This path must be a UNC or URL to which the user has access from the workstation the document is being viewed from.
11. In the **Print Style Sheet** field, browse to or enter the full path of the .XSL file that is to be associated with the document when it is printed. This path must be a UNC or URL to which the user has access from the workstation the document is being viewed from.
12. Click **Save**. The **XML Style Sheet Settings** dialog box is closed.

    The style sheet is added to the XML Style Sheet list in the **XML Style Sheet Settings** dialog box.

    To disassociate a style sheet with a Document Type, select it in the XML Style Sheet list and click **Delete**.
13. Repeat Steps 7-12 for each style sheet you want to configure. You can add as many Keyword Value/style sheet associations as you wish, but they must all be Keyword Values of the same Keyword Type. When configuring style sheets, you can only associate one Keyword Type for each Document Type.
14. When you are finished configuring style sheets, click **Close**.

Editing an XML Style Sheet Associated by Keyword Type

If you need to edit the Keyword Type or Keyword Value selected for the style sheet configuration.

1. Select the Style Sheet/Keyword Value association from the Style Sheet Name/Keyword Value list.
2. Use the **Keyword Type** drop-down to change the assigned Keyword Type or enter a new Keyword Value in the **Keyword Value** field.
3. Click **Apply**.

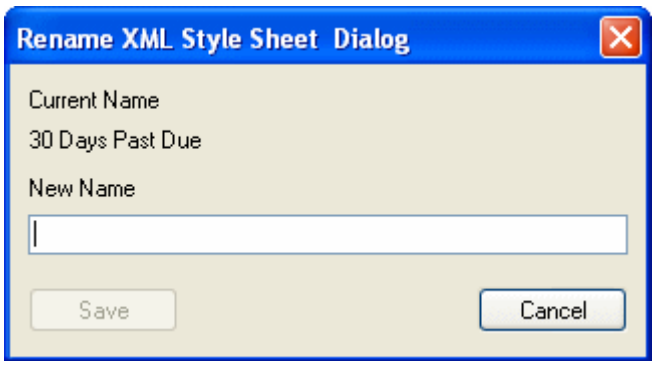
4. Click **Close**.

Renaming an XML Style Sheet

To rename an XML style sheet:

1. From the OnBase Configuration module, click **Document | Document Types**. The **Document Types** dialog box is displayed.
2. Select the Document Type associated with the style sheet you would like to rename from the Document Type list and click **XML Style Sheet**.

   The **XML Style Sheet Settings** dialog box is displayed.
3. Double-click on the style sheet to be renamed. The **Rename XML Style Sheet Dialog** dialog box is displayed.



4. Enter the new name for the style sheet.
5. Click **Save**.

User Group Configuration

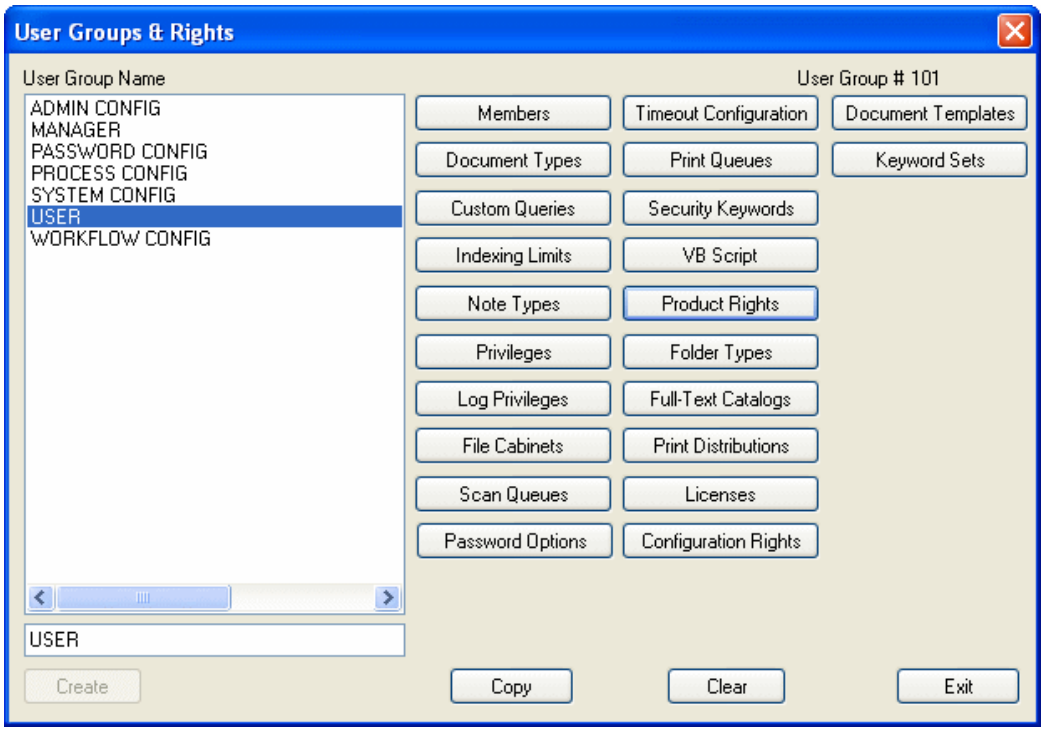
Ensure that all users who will be using EDI 835 have the proper User Group Rights. Different User Groups need different levels of permissions, based on the tasks that they are required to perform.

Note: The following information is specific to EDI 835 only, and is not intended to be a comprehensive guide for configuring User Group Rights. For more on configuring User Group Rights, see the System Administration documentation.

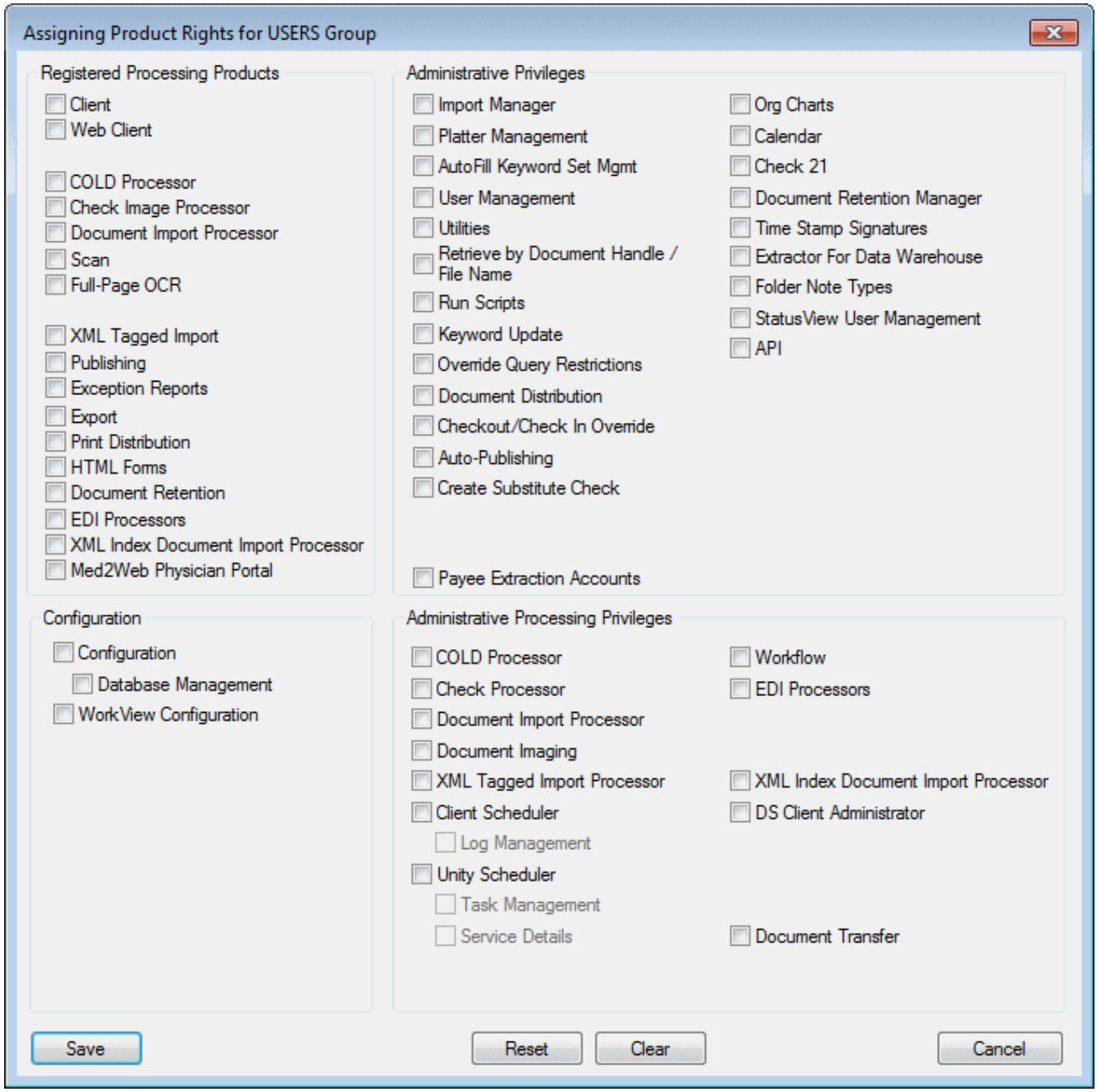
Configuring User Groups to Configure EDI 835 Processing

To configure a User Group with the minimum rights necessary to configure an EDI 835 process format:

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

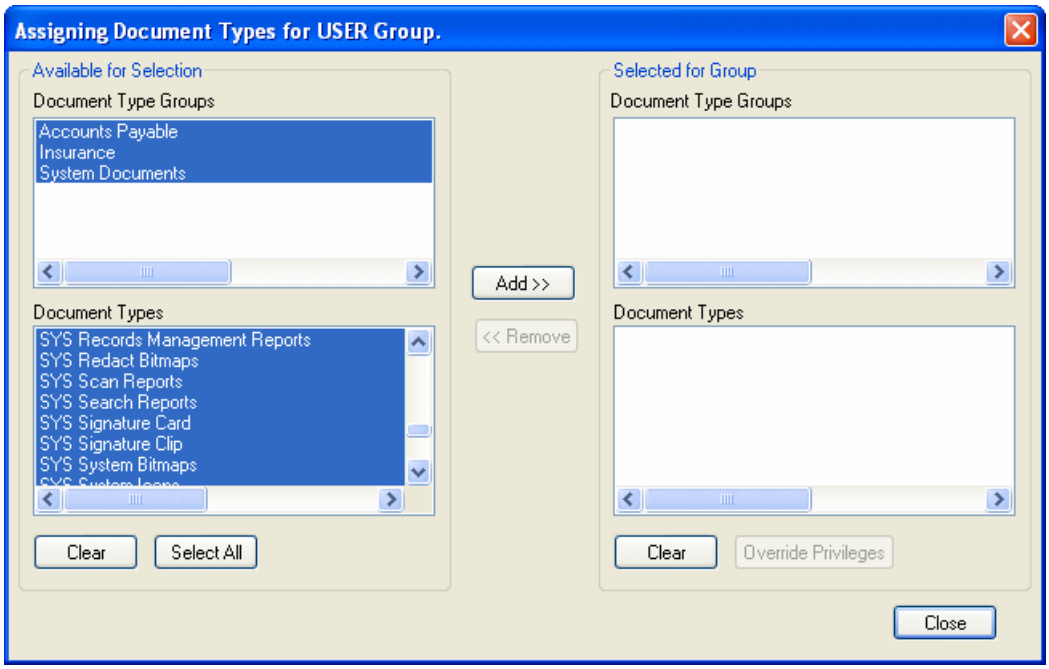


2. Select the User Group that will configure EDI 835 process formats:
   a. Click **Product Rights**. The **Assigning Product Rights for <User Group Name> Group** dialog box is displayed.



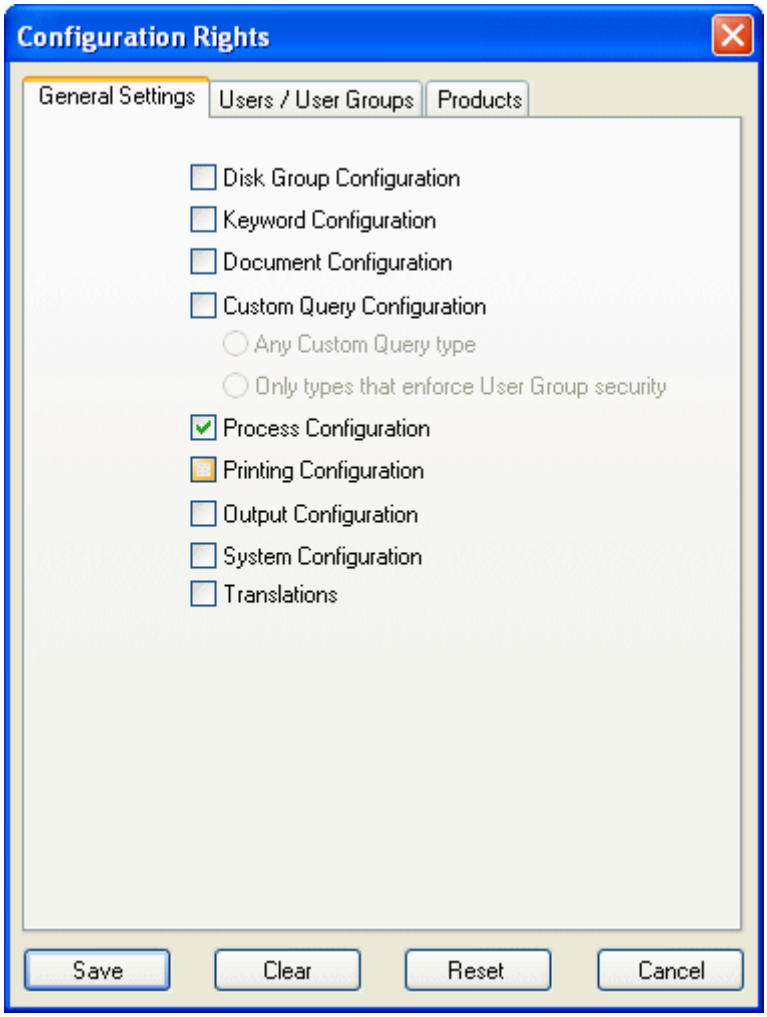
In the Configuration section, select the **Configuration** check box and click **Save**.

b. Click **Document Types**. The **Assigning Document Types for <User Group Name> Group** dialog box is displayed.



Select the individual Document Types or the Document Type Groups that must be available to be assigned to an EDI 835 process format in the Available for Selection section and move them to the Selected for Group section. Click **Close**.

c. Click **Configuration Rights**. The **Configuration Rights** dialog box is displayed.



On the **General Settings** tab, select the **Process Configuration** check box. Click **Save**.

Optional User Group Rights

Caution: The following information is intended to be a summary of some of the commonly-assigned User Group Rights for User Groups given the ability to configure EDI 835 process formats. Depending on your solution, it may not advisable to give a User Group this User Group Right. For a complete guide to all User Group Rights, see the System Administration documentation.

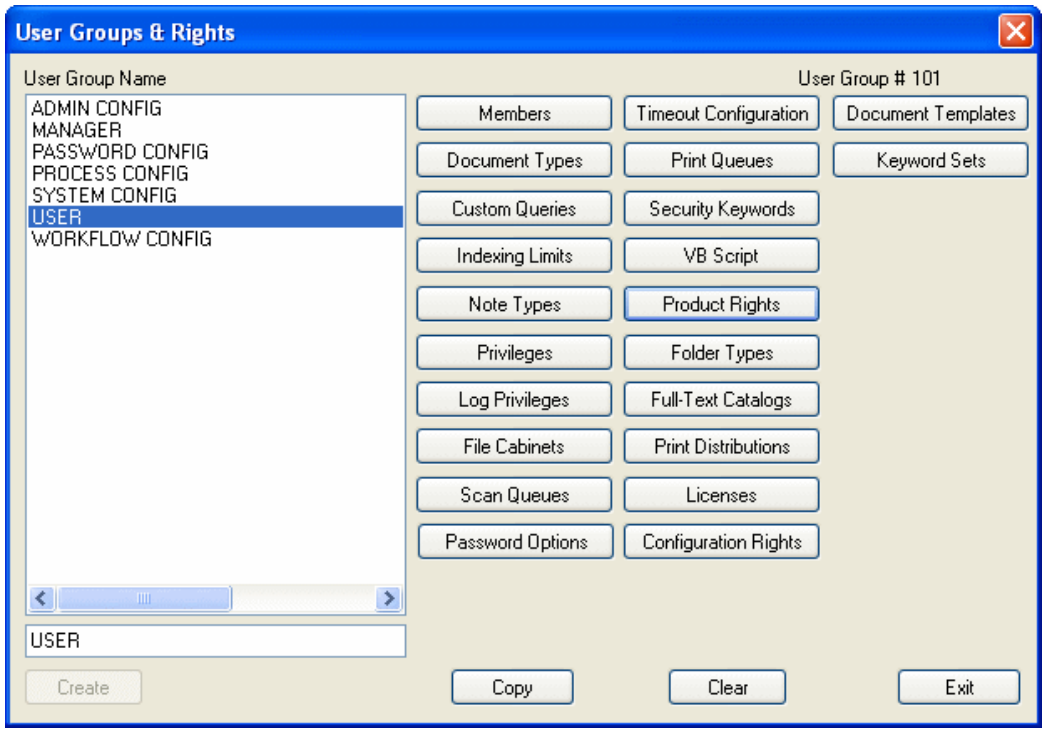
The following optional User Group Right can be assigned to a User Group to allow its members to perform additional tasks related to configuring EDI 835 process formats.

- To give users the ability to configure the User Group Rights of other User Groups (i.e., to configure User Groups to have the ability to perform EDI 835 processing), click **Configuration Rights** and select the Users/User Groups tab. Select the **User Configuration** check box and the **User Account Admin** radio button.

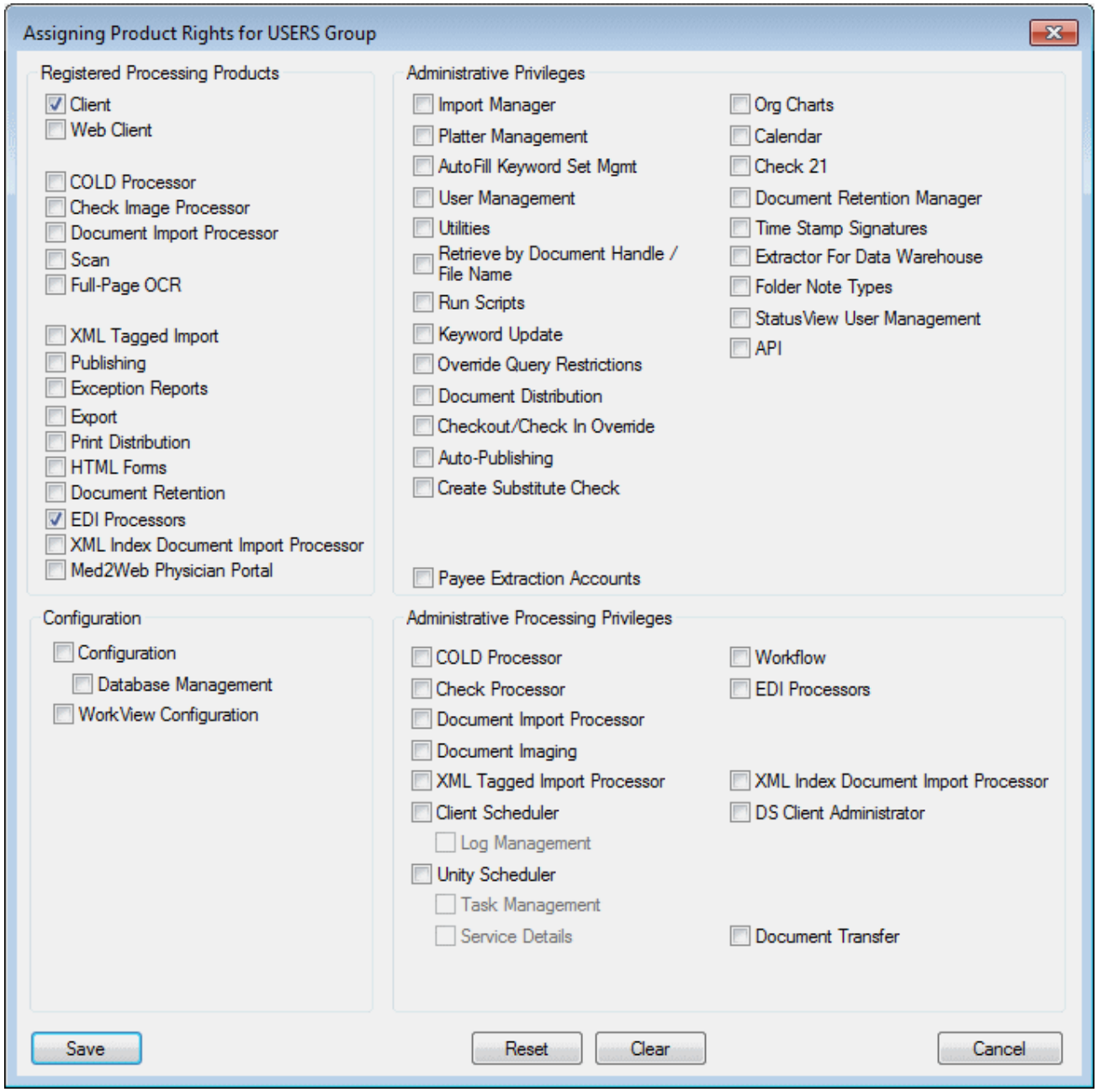
Configuring User Groups to Perform EDI 835 Processing

To configure a User Group with the minimum rights necessary to initiate an EDI 835 process:

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



2. Select the User Group that will perform EDI 835 processing and click **Product Rights**. The **Assigning Product Rights for <User Group Name> Group** dialog box is displayed.



3. In the **Registered Processing Products** section, select the **Client** and **EDI Processors** check boxes.
4. Click **Save**.

Optional User Group Rights

Caution: The following information is intended to be a summary of some of the commonly-assigned User Group Rights for User Groups given the ability to perform EDI 835 processing. Depending on your solution, it may not advisable to give a User Group these User Group Rights.For a complete guide to all User Group Rights, see the System Administration documentation.

The following optional User Group Rights can be assigned to a User Group to allow its members to perform additional tasks related to EDI 835 processing. Unless noted, these User Group Rights can be assigned independent of one another.

- To give users the ability to view documents from within the EDI Queue batch status queues (e.g., **Incomplete Process**, **Awaiting Commit**, **Committed**), click **Privileges** and select the **Retrieve/View** check box.
- To give users the ability to delete individual documents from a batch within the EDI Queue batch status queues (e.g., **Incomplete Process**, **Awaiting Commit**, **Committed**), click **Privileges** and select the **Delete** check box.

Note: This does not give users the ability to purge batches.

- To give the users the ability to view Keyword Values for documents from within the EDI Queue batch status queues (e.g., **Incomplete Process**, **Awaiting Commit**, **Committed**), click **Privileges** and select the **View Keywords** check box.
- To give the users the ability to view and/or modify Keyword Values for documents from within the EDI Queue batch status queues (e.g., **Incomplete Process**, **Awaiting Commit**, **Committed**), click **Privileges** and select the **Modify Keywords** check box.
- To give the users the ability to view the properties of documents from within the EDI Queue batch status queues (e.g., **Incomplete Process**, **Awaiting Commit**, **Committed**), click **Privileges** and select the **Document Properties** check box.
- To give users the ability to generate Daily Reports for all EDI 835 processes, click **Privileges** and select the **Create List Report** check box.

Note: Daily Reports are created using information from all EDI 835 process formats that have been configured to use the **Accumulate Processing Information** option. If this option is not selected for a process format, its information is not included in the Daily Report.

- To give users the ability to commit or purge batches from the EDI Queue batch status queues (e.g., **Incomplete Process**, **Awaiting Commit**, **Committed**), click **Product Rights** and, in the Administrative Processing Privileges section, select the **EDI Processors** check box.

Configuring User Groups to Configure/Run a Scheduled EDI 835 Process

To configure the Scheduler to perform a scheduled EDI 835 process, a user must belong to a user group with the **Client**, **Scheduler** and **EDI Processors** product rights.

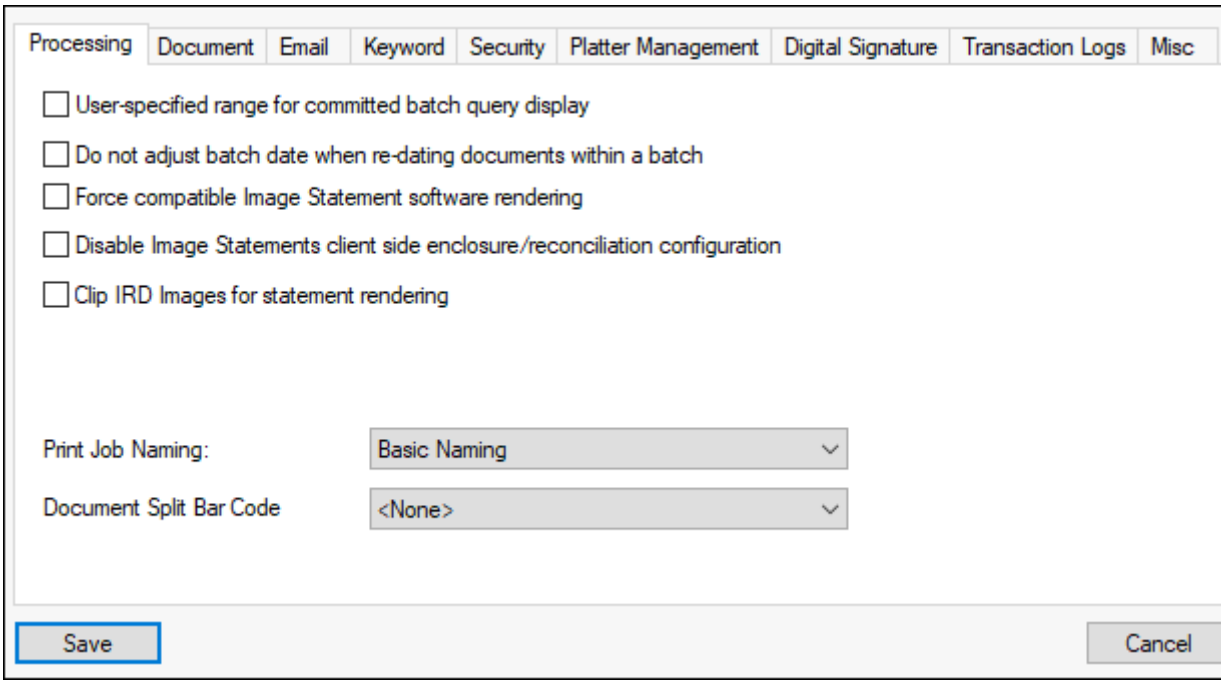
To run a scheduled EDI 835 process, the user account logged onto OnBase needs only the **Client** product right in order for the scheduled process to run.

For more information on configure a scheduled process, see Scheduling on page 92.

Global Client Settings

The Global Client Settings affect the OnBase Client's general operation. To access the Global Client Settings dialog box, click **Users** | **Global Client Settings** in the OnBase Configuration module.

While a number of the Global Client Settings may affect your OnBase solution as a whole, some options on the **Processing** tab directly affect the EDI 835 processor.



Option	Description
User-specified range for committed batch query display	Select this option to prompt the user to select a range of batches to display. When a user selects the **Committed** batch status queue in the EDI Queue, the **Select Batch Range: Committed** dialog box is displayed. This allows users to limit the number of batches displayed in the queue, based on the criteria entered. The last range entered is selected each time the **Selected Batch Range: Committed** dialog box is displayed.

Option	Description
Do not adjust batch date when re-dating documents within a batch	Select this option to modify how date data is applied when a user re-dates a batch of documents. By default, re-dating a batch modifies the Document Date of both the batch and the documents within the batch. When this option is selected, re-dating a batch modifies only the Document Date of the documents within the batch; the batch itself retains its original date.

While enabling these options is not required to perform EDI 835 processing, you may find that their effects improve the overall performance of your OnBase solution.

For additional information on Global Client Options, see the System Administration documentation.

Process Format Configuration

You must perform the following steps in order to configure the EDI 835 processor:

- **Create Custom EDI Field Codes (Optional)**. See Creating EDI 835 Field Codes on page 47 for more information.
- **Create the EDI 835 Process Format**. See Creating an EDI 835 Process Format on page 52 for more information.
- **Configure the EDI 835 General Process Settings**. See Configuring the EDI 835 Settings on page 55 for more information.
- **Assign Document Types to the EDI 835 Process Format**. See Configuring the EDI 835 Document Types on page 70 for more information.
- **Set EDI 835 Process-Specific Information for the EDI 835 Process Format**. See Configuring the EDI 835 Process Settings on page 71 for more information.
- **Map EDI Fields to OnBase Keyword Types**. See Configuring the EDI 835 Field Order on page 75 for more information.

Creating EDI 835 Field Codes

A field code is used to identify information in the EDI data stream. During processing, data associated with these field codes is stored as a Keyword Value within OnBase.

OnBase is pre-configured to recognize a number of EDI field codes, but your solution may require you to create additional field codes that OnBase does not identify by default.

Tip: For a list of all EDI default field codes, see the Default Field Codes chapter.

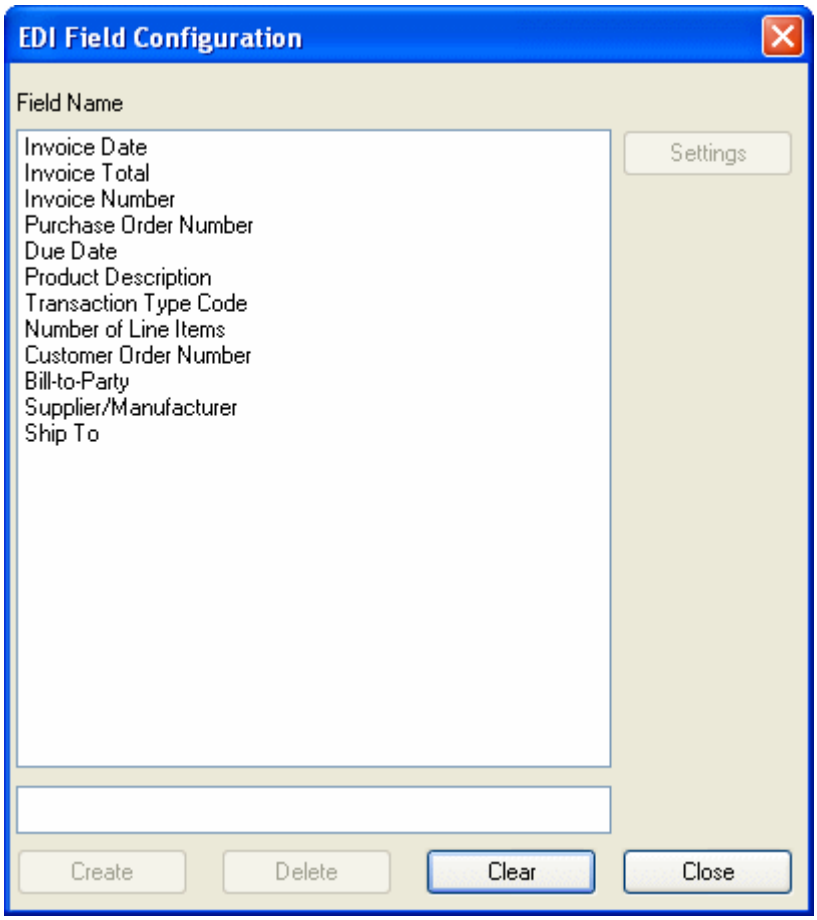
To create a custom EDI field code:

1. From the OnBase Configuration module, click **Import** | **EDI Field Configuration**. The **Choose Processor** dialog box is displayed.

2. Using the **Processor** drop-down list, select the type of EDI process you are configuring field codes for.

Note: Only the EDI processors that you are licensed for are displayed in the **Processor** drop-down list.

3. Click **Configure**. The **EDI Field Configuration** dialog box is displayed.



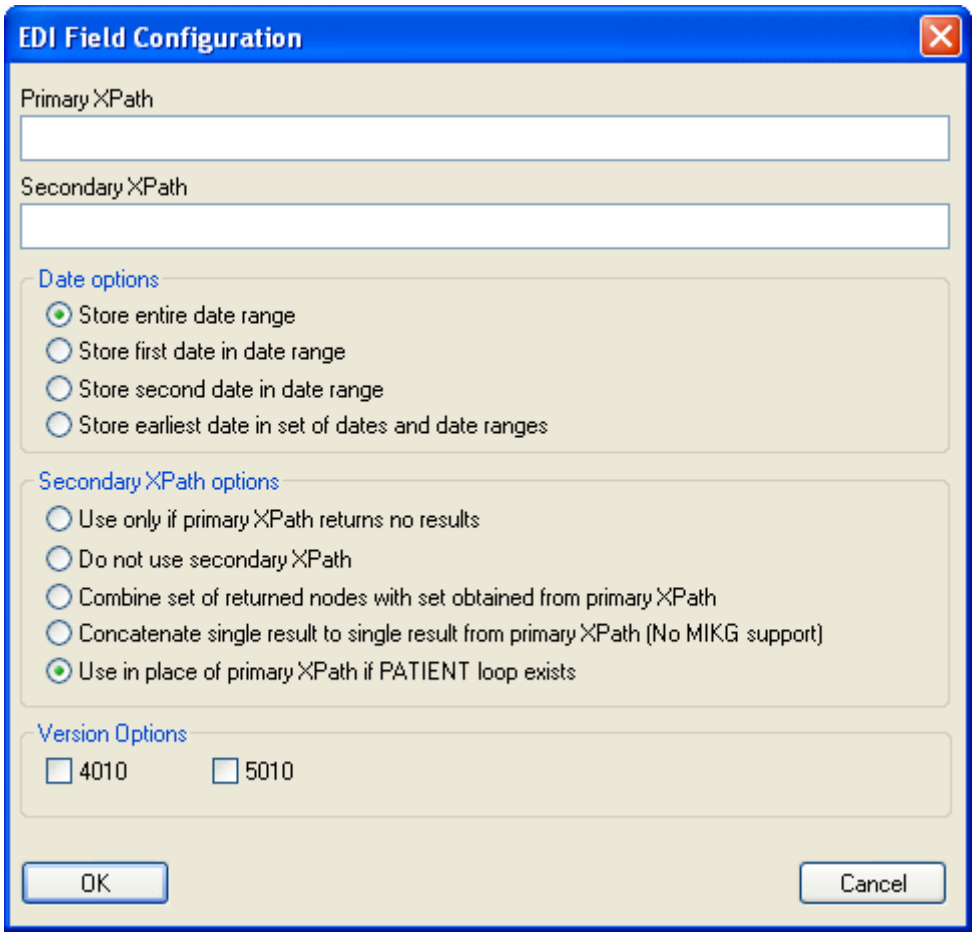
Note: The field codes that are displayed may be different, depending on the type of EDI processor you selected in Step 2.

All EDI field codes for this type of EDI processor, including default field codes and custom field codes that have been previously created, are displayed in the Field Name list.

4. Enter a name for the new field code in the **Field Name** field and click **Create**. To edit an existing field code, select it in the Field Name list and click **Settings**.

Note: Default field codes cannot be edited, although their settings can be viewed for reference purposes.

The **EDI Field Configuration** dialog box is displayed.



Option	Description
Primary XPath	This field contains the XPath to the primary value to be pulled from the EDI stream.
Secondary XPath	This field contains the XPath to the secondary value to be pulled from the EDI stream.

Option	Description
Date Options	This setting determine the date option for the field code. **Note:** Although active by default, these options are only functional when a Date Keyword Value is mapped to the field code. • **Store entire date range**: Stores the entire date range in the configured XPath. • **Store first date in date range**: Stores only the first date in the date range in the configured XPath. • **Store second date in date range**: Stores only the second date in the date range in the configured XPath. • **Store earliest date in date range**: Stores the earliest date in the EDI stream as the Keyword Value. This option is only functional when used with a primary XPath.
Secondary XPath Options	This setting determines the secondary XPath option for the field code. • **Use only if primary Xpath returns no results**: The value in the secondary XPath will only be used if there is no value in the primary XPath. • **Do not use secondary XPath**: The secondary XPath will not be used. • **Combine set of returned nodes with set obtained from primary XPath**: Takes each piece of data returned from a node and creates an instance of a Keyword Value or Keyword Type Group for it. **Note:** If this option is used in conjunction with a Single-Instance Keyword Type Group, only the data obtained from the primary XPath will be used. • **Concatenate single result to single result from primary XPath (No MIKG support)**: Concatenates the results from both the primary and secondary XPaths into one result. **Note:** This option is not supported for use with Multi-Instance Keyword Type Groups. • **Use in place of primary XPath if PATIENT loop exists**: The value in the secondary XPath will be used if the PATIENT loop exists in the EDI stream. **Note:** When EDI fields are mapped to OnBase Keyword Types that are part of a Multi-Instance Keyword Type Group, only the field's primary XPath is used, regardless of the field's secondary XPath configuration.
Version Options	Select the check box that corresponds to the version of the EDI 835 processor that you are using.

5. Set the configuration options displayed as needed for the newly-created-field code.
6. Click **OK**. The field code's configuration is saved, the **EDI Field Configuration** dialog box is closed.
7. Click **Close** to exit the **EDI Field Configuration** dialog box.

Creating Header Field Codes

If you want to identify header information in your EDI data stream, you must create four custom Field Codes. The following field codes must be created:

Field Name	Primary XPath
Sender ID	//Interchange/@SenderID
Interchange Date	//Interchange/@InterchangeDate
Receiver ID	//Interchange/@ReceiverID
Functional ID Code	//Interchange/@FunctionalIdentifier

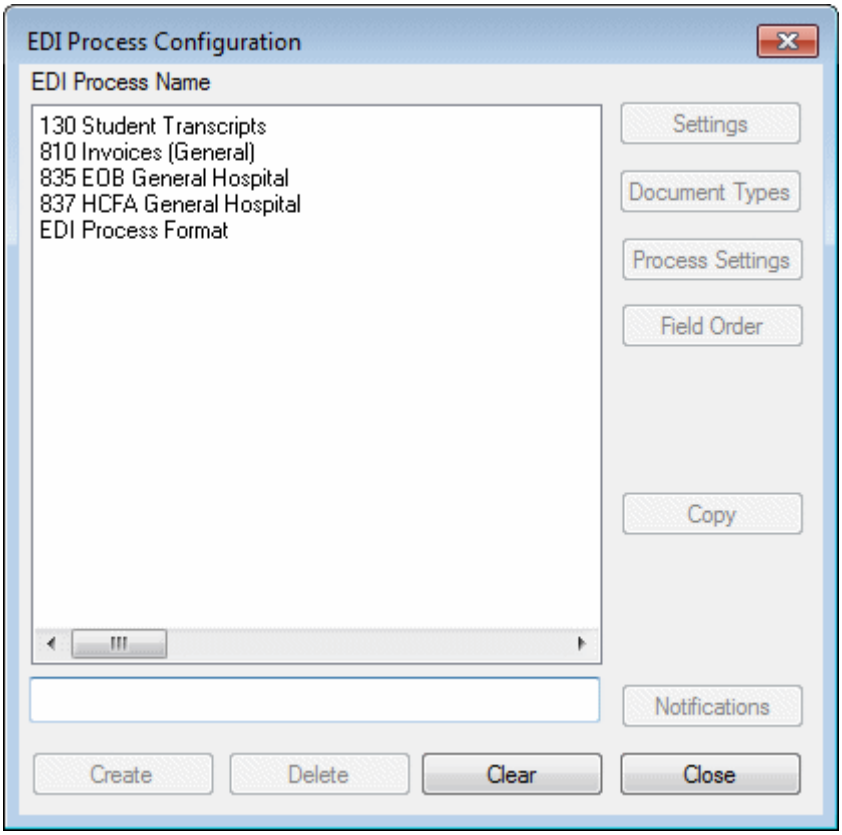
Once these Field Codes have been created, you must assign them to your EDI Process during Field Order Configuration. For more information, see Configuring the EDI 835 Field Order.

Creating an EDI 835 Process Format

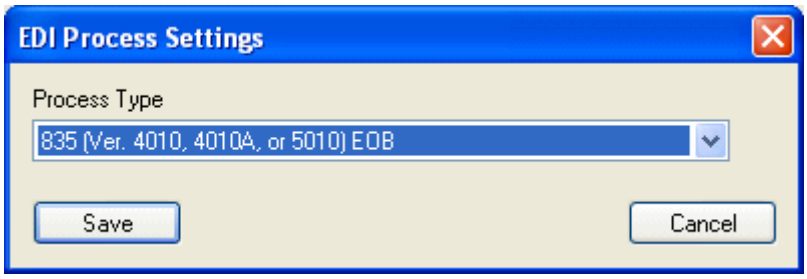
Each individual EDI 835 process is configured to specifically parse an import file to identify, index, and import documents into OnBase. This collection of configuration options is called a process format; each EDI 835 process format is configured to import documents into one Document Type in OnBase.

To create an EDI 835 process format:

1. From the OnBase Configuration module, click **Import** | **EDI Import** | **EDI Import Processor**. The **EDI Process Configuration** dialog box is displayed.



2. Enter a name for the process format in the **EDI Process Name field**.
3. Click **Create**. The **EDI Process Settings** dialog box is displayed.

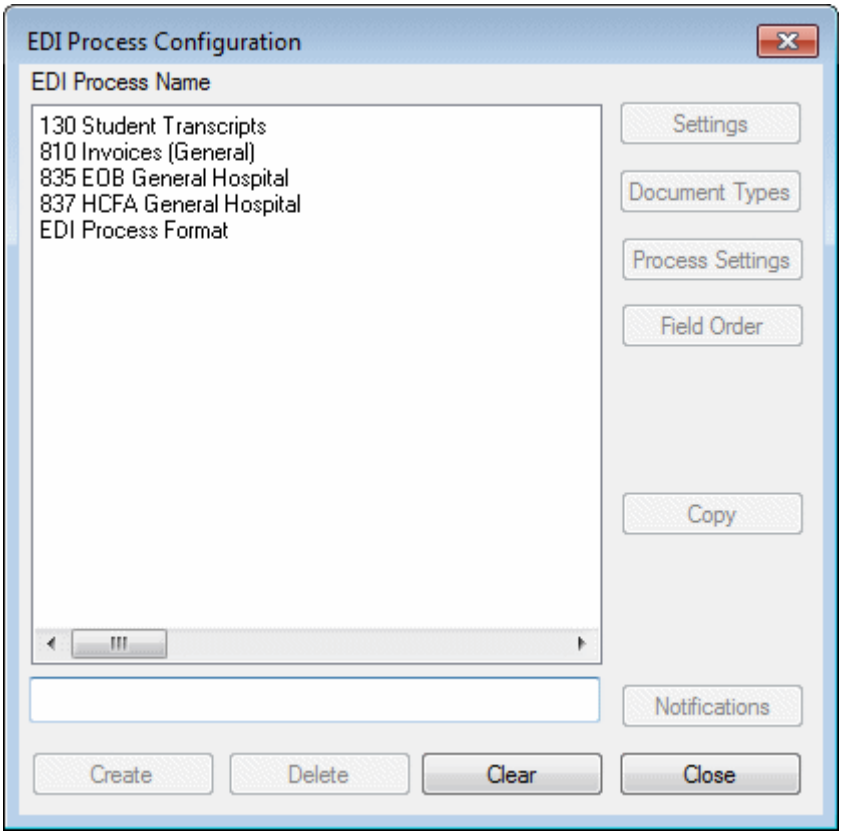


4. Select the type of EDI processor that the process is being created for from the **Process Type** drop-down.
5. Click **Save**. The **Process Settings For: <Process Format Name>** dialog box is displayed. For more information on the options displayed in this dialog box, see Configuring the EDI 835 Settings section.

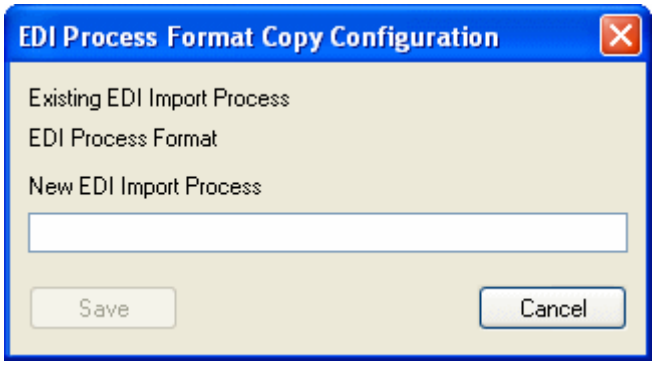
Copying an EDI 835 Process Format

To create a new EDI 835 process format by copying the settings from an existing EDI 835 process format:

1. From the OnBase Configuration module, click **Import | EDI Import | EDI Import Processor**. The **EDI Process Configuration** dialog box is displayed.



2. Select the process format to be copied.
   To deselect the selected process format, click **Clear**.
3. Click **Copy**. The **<Process Format Name> Copy Configuration** dialog box is displayed.



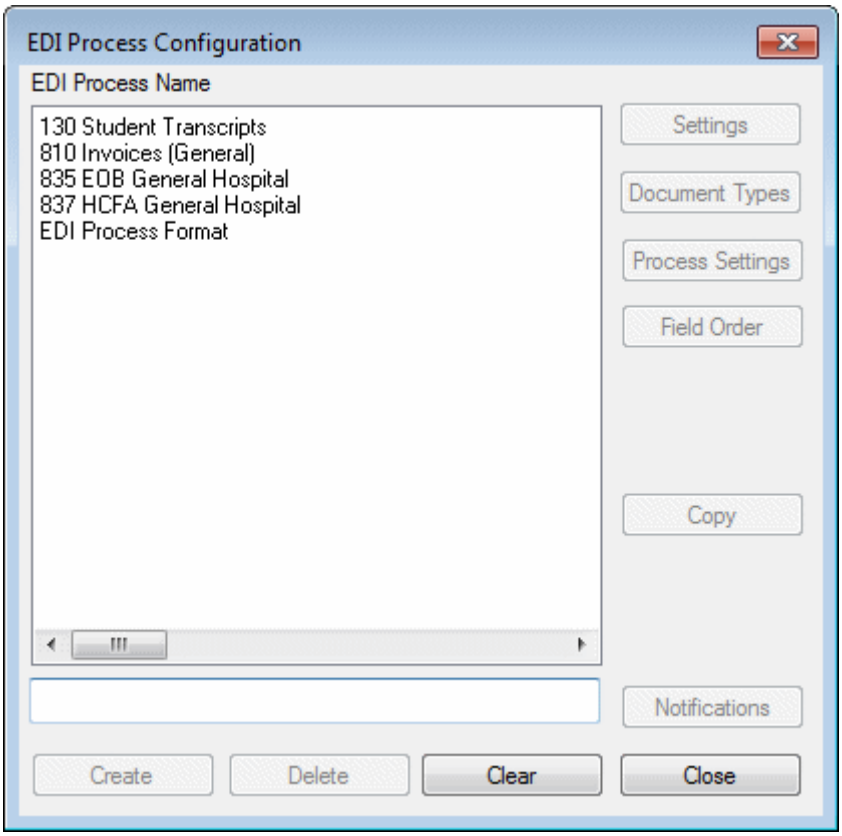
4. Enter a name for the process format to be created in the **New EDI Import Process** field.

5. Click **Save**. The newly-created process format is now listed in the EDI Process Name list in the **EDI Process Configuration** dialog box.

Deleting an EDI 835 Process Format

To delete an existing EDI 835 process format:

1. From the OnBase Configuration module, click **Import** | **EDI Import** | **EDI Import Processor**. The **EDI Process Configuration** dialog box is displayed.



2. Select the process format to be deleted.

   To deselect the selected process format, click **Clear**.
3. Click **Delete**. A confirmation dialog box is displayed.
4. Click **Yes**. The process format is deleted and it is no longer listed in the EDI Process Name list in the **EDI Process Configuration** dialog box.

Configuring the EDI 835 Settings

The general configuration options for the EDI 835 process format are contained in the **Process Settings** dialog box.

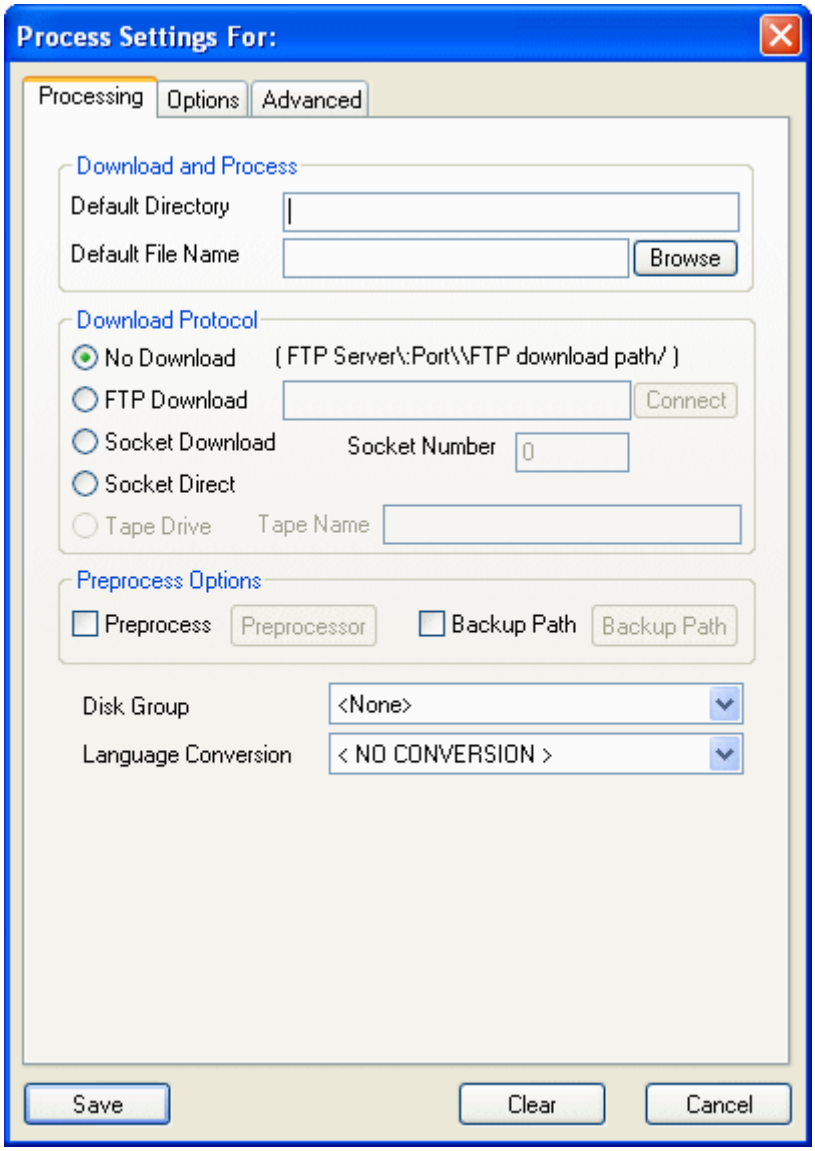
Among other things, these options allow you to specify the file(s) to be processed, as well as certain pre- and post-processing options that are applied to the data. This dialog box also contains a command line that can be run to preprocess the data or call a batch file.

It is important to note that before the process format can be run, the import file(s) must be accessible to the processing workstation.

Note: The option of using a File Transfer Protocol (FTP) or a socket connection to download the necessary files are available for some processors. FTP is a protocol used to transfer files over a network. An FTP client can request a file from the server, or can place a file on the server. FTP includes functions to log onto the network, list directories, and copy files. FTP is not practical for retrieving large reports, because the whole file will be retrieved temporarily to the Client workstation.

To configure the general settings for the EDI 835 process format:

1. From the OnBase Configuration module, click **Import** | **EDI Import** | **EDI Import Processor**. The **EDI Process Configuration** dialog box is displayed.
2. Select the process format to be configured and click **Settings**. The **Process Settings** dialog box is displayed.



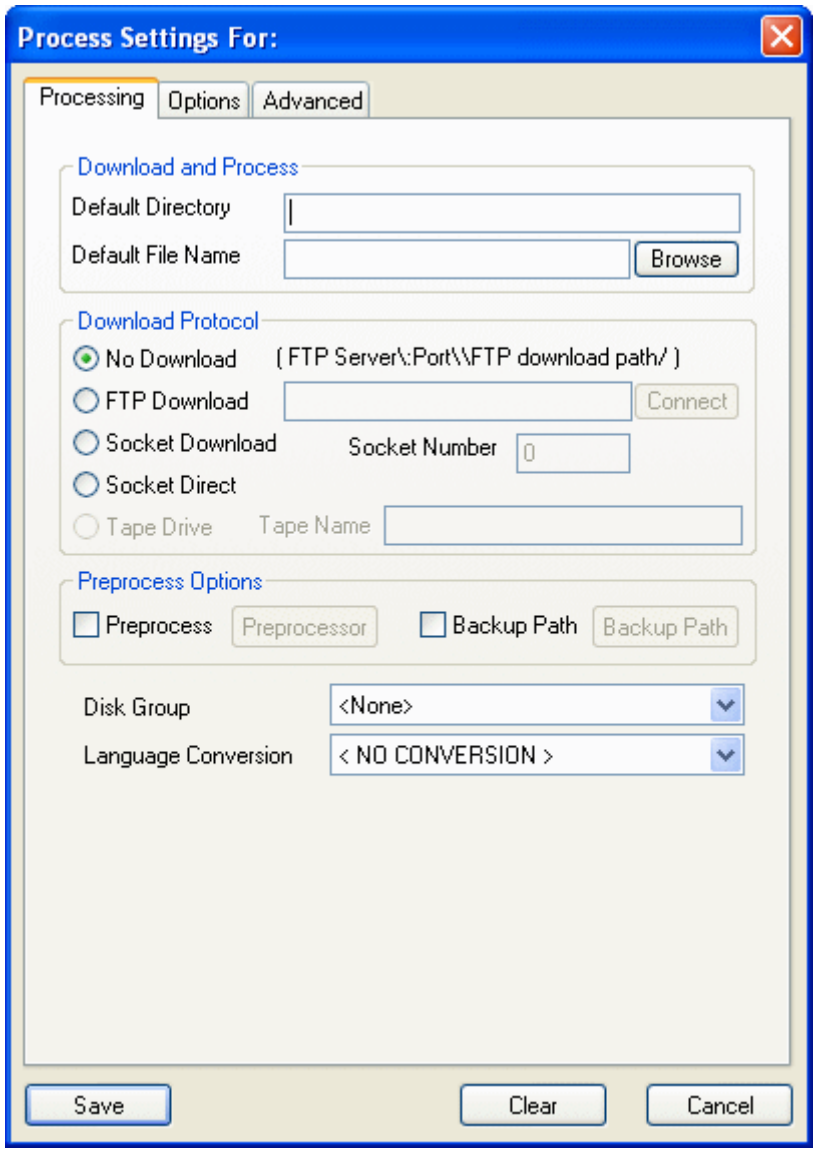
The **Processing** tab is selected by default.

3. Ensure that the **Processing** tab is selected and configure the displayed settings as needed. For more information on the settings displayed on the **Processing** tab, see The Processing Tab below.
4. Select the **Options** tab and configure the displayed settings as needed. For more information on the settings displayed on the **Options** tab, see The Options Tab below.

5. Select the **Advanced** tab and configure the displayed settings as needed. For more information on the settings displayed on the **Advanced** tab, see The Advanced Tab below.
6. Once you have set all of the configuration options on the **Process Settings** dialog box, click **Save**.

The Processing Tab

The **Processing** tab contains general processing information, such as the location of the import file and the Disk Group the processed documents are to be stored in.



Some notes about the options on the **Processing** tab:

- It is mandatory that you configure the **Default Directory**, and **Disk Group** for the process format. You are not able to save and close the **Process Settings** dialog box unless these options have been configured.
- FTP processing is only functional for the following modules: EDI 130, EDI 810, EDI 835, EDI 837, AFP Input Filter, some Check Import Processes, the NSF Return Process (Check21), COLD/ERM, Document Import Processor, HL7, Keyword Updater, PCL Input Filter, Physical Records Management, and XML Index Document Import Processor.

The following options are displayed on the **Processing** tab:

Download and Process

The two options in this section, **Default Directory** and **Default File Name**, point the process format to the import file containing the data to be processed.

Download and Process Options	Description
Default Directory	Enter the file path to the folder where the import file is located. **Note:** The maximum length of the file path is 60 characters. Click **Browse** and navigate to the folder containing the import file or enter the file path to the folder that contains the import file into the **Default Directory** field. **Tip:** The ability to access the data files and place them into the configured Disk Group affects the speed of the process. The process runs faster if the data files are stored locally on the processing workstation. If you are connecting to an FTP server, see Connecting to an FTP Server on page 60 for more information on what must be entered into the **Default Directory** field.

Download and Process Options	Description
Default File Name	Enter the name of the import file or use the **Browse** button to navigate to it. When the **Browse** button is used, the **Default Directory** and **Default File Name** fields are both populated when a file is selected. **Note:** The maximum length of the **Default File Name** value is 60 characters. The **?** and ***** wildcards can be used to specify multiple files. For example, *.* processes all files in the folder specified in the **Default Directory** field. When connecting to an FTP server, enter the server name to which you are connecting. For example, **ftp:\\[ftpserver]**, where **ftpserver** is replaced with the name of the FTP server or IP address. If the **Store Import File** option is selected at the time of processing, a copy of the import file is stored in the **System Documents** Document Type Group, using the **SYS EDI Import Files** Document Type.

Connecting to an FTP Server

Keep the following considerations in mind when using the **Default Directory** field to connect to an FTP server:

- When using FTP with the **FTP Download** option, the **Default Directory** option is the directory to which the FTP file is downloaded for processing and accessed from the path specified in the **FTP Download** field.
- When using FTP with the **No Download** option, the FTP file is accessed from the path specified in the **Default Directory** field.
- If you are using the **Default Directory** field to access an FTP site through a UNC path (rather than using the **FTP Download** field), ensure the format of the UNC path is correct. EDI 835 supports connections to FTP servers that require a Fully Qualified Domain Name (FQDN) as well as connections that do not require a FQDN. The following example demonstrates connecting to an FTP server that requires a FQDN: **\\ftp:\name@domain.net:<password>\\ftpserver\:21\\ftpdirectory**, where **name@domain.net** and **<password>** are replaced with the appropriate logon credentials, **ftpserver** is replaced with the name of the FTP server or IP address, and **ftpdirectory** is replaced with the name of the FTP directory on that server.

Note: Depending on the FTP server you are connecting to, the syntax of your FTP server's URL may be different.

- For performance or character length reasons, it is recommended that you replace the server name with its IP address. Try some benchmarks, and if name resolution causes a performance degradation, then make the corresponding change in the OnBase Configuration module, under **Disk Groups** | **Volume Information**.
- The password needs to be re-entered whenever changes are made to the **Default Directory** field.

Download Protocol

Select the radio button in this section that describes how the processing workstation will access the import file.

By default, the **No Download** radio button is selected.

Note: FTP processing is only functional for the following modules: EDI 130, EDI 810, EDI 835, EDI 837, AFP Input Filter, some Check Import Processes, the NSF Return Process (Check21), COLD/ERM, Document Import Processor, HL7, Keyword Updater, PCL Input Filter, Physical Records Management, and XML Index Document Import Processor.

Download Protocol Options	Description
No Download	Select if the file(s) to be processed does not need to be downloaded to the processing workstation (i.e., the files are already accessible locally on your computer, LAN or WAN). **Note:** When using FTP with the **No Download** option, preprocessors cannot be used unless they have been created with the ability to access files via FTP.

Download Protocol Options	Description

FTP Download	**Note:** To use the **FTP Download** option, the build-specific **mzftp.dll** file must be located in the same folder as the OnBase executables. This DLL requires the **wininet.dll** file, which is typically installed with Microsoft® Internet Explorer 4.01 or higher.
	
	Select this radio button if you are using File Transfer Protocol to obtain files for processing. Ensure that the format of the FTP server's URL is specified correctly. For example:
	`FTP Server\:Port\\FTP Download Path\`
	Where **FTP Server** is replaced with the name of the FTP server or IP address and **FTP Download Path** is replaced with the name of the FTP directory on that server.
	Secure File Transfer Protocol (SFTP) is not supported for use with EDI 835.
	
	Note: Depending on the FTP server you are connecting to, the syntax of your FTP server's URL may be different.
	
	Tip: The port is normally **21**, but your solution may be different.
	
	Tip: For performance or character length reasons, it is recommended that you replace the server name with its IP address. Try some benchmarks, and if name resolution causes a performance degradation, then make the corresponding change in the Configuration module, under **Disk Groups** | **Volume Information**.
	
	1. Place a **** in the **Default Directory** field. The **Default File Name** field must be set to the name of the file to be processed.
	2. Click **Connect** and enter your **FTP User Name** and **FTP Password**. If your FTP server requires a FQDN, the user name must be entered in the form:
	`user name@domain name`
	3. Click **Save**.
	
	Note: Before processing, the files must be accessible from the workstation.

Socket Download	A TCP/IP socket can be used if it is the only way to capture the EDI 835 data. Select the **Socket Download** option in specific instances to allow a connection that downloads information to the processing workstation. Enter the specification number of the socket download connection in the **Socket Number** field. **Note:** Before processing, the files must be accessible from the workstation.
Socket Direct	Active for Check Image Processing only.

Download Protocol Options	Description
Tape Drive	Active for Check Image Processing only.

Preprocess Options

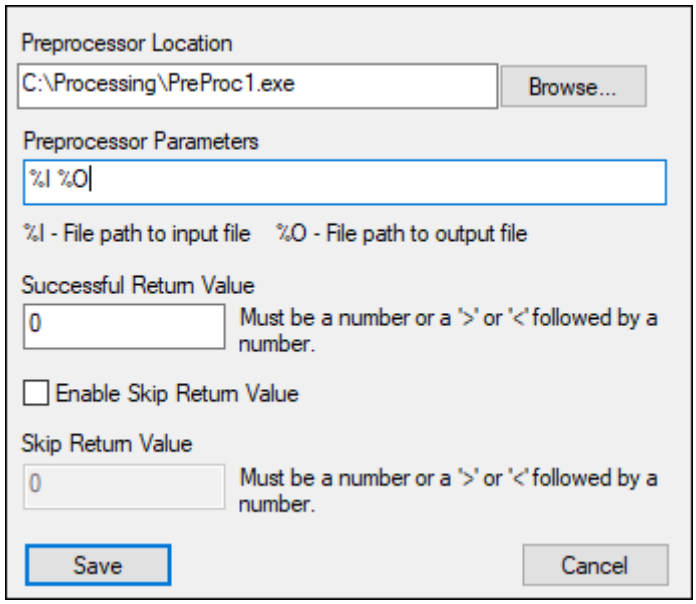
If an import file is formatted in a way that cannot be processed by EDI 835, a preprocessor can be used to reformat the data so it can be processed. A preprocessor is a separate program used to reformat existing import files using user-defined rules and descriptions to prepare them for processing.

While the options in this section are typically used to initiate a preprocessor, they can be used to execute any command.

Note: Typically, when configuring a new process format or modifying an existing process format, the import file is processed with only the Preprocessor Options configured. This results in a "clean" EDI 835 data file that can then be viewed and used to configure the remaining EDI 835 processor configuration parameters.

To enable the process format to use a preprocessor:

1. Select the **Preprocess** check box.
2. Click **Preprocessor**. The **Preprocessor Configuration** dialog box is displayed.



3. Enter the path to the preprocessor executable in the **Preprocessor Location** field, or click **Browse** to browse to it.

Note: The **Preprocessor Location** field is limited to 255 characters.

4. Enter any preprocessor parameter values in the **Preprocessor Parameters** field.

   Because each preprocessor is unique based on its function, the preprocessor parameters vary depending on your solution. You will be informed of the values for these parameters when your solution is installed.

   Two of the most common parameters are input file (**%I**) and output file (**%O**). For most preprocessors, the **Preprocessor Parameters** field will contain the input and output file variables and an application-specific command line.

Note: This field is limited to 128 characters.

   - The input file is specified by the **%I** variable. When the preprocessor is run, the **%I** is replaced with the name of the import file specified by the process format.
   - The output file is specified by the **%O** variable. It is replaced in a similar manner when the preprocessor is run.

Caution: The parameters must be listed in the following order: **%I %O**. If the order of the parameters is reversed (**%O %I**), all data will be removed from the data file.

5. Enter the expected number (or range of numbers, using **<** or **>**) that the preprocessor returns after a successful process in the **Successful Return Value** field. If the preprocessor does not return a successful value, the file is not processed.

   This value is dependent on the type of preprocessor used, and will vary depending on the installation. You will be informed of this value when your solution is installed.

Note: The **Enable Skip Return Value** option and **Skip Return Value** field are not supported for use with EDI 835.

6. Click **Save**.

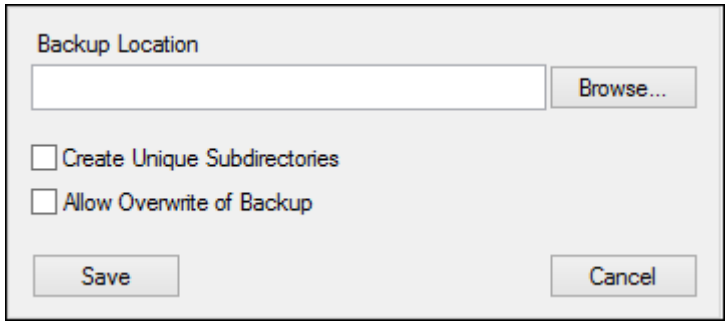
You can backup the import file prior to it being processed to ensure that the process format and its preprocessor were configured correctly and no data is lost or damaged in the import file.

If a file already exists in the backup location with the same name as the import file you are trying to backup, the import file will not be processed unless the **Create Unique Subdirectories** option is selected.

Tip: It is considered a best practice to always select the **Backup Path** check box.

To enable the backup-prior-to-processing option:

1. Select the **Backup Path** check box.
2. Click **Backup Path**. The **Backup Path** dialog box is displayed.



3. Enter the path to the backup location (i.e., the location where the import file is to be copied to) in the **Backup Location** field, or click **Browse** to browse to the folder.

Note: If you enter a path that does not exist (i.e., a folder not already created), it will automatically be created when the process is run.

4. Select **Create Unique Subdirectories** if multiple import files have the same file name and each of them need to be backed up.

   By default, if a process format uses an import file that has the same name as (but different content than) an existing backup file, the file is not processed. Select **Create Unique Subdirectories** to allow import files with the same name to be processed and backed up to unique subdirectories. When this option is selected, a unique subdirectory is created within the specified backup directory for each import file. The directory is created in the following format, based on the date and time the process is run: **Month_Date_Year_Hour_Minute_Second** (i.e., **mm_dd_yyyy_hh_mm_ss**).

   Alternatively, select **Allow Overwrite of Backup** to have import files with the same name as an existing backup file overwrite the old backup. This can be useful if you frequently use import files with the same name and don't want a high volume of unique subdirectories.

   These options also function with FTP backups, if applicable.
5. Click **Save**.

Disk Group & Language Conversion

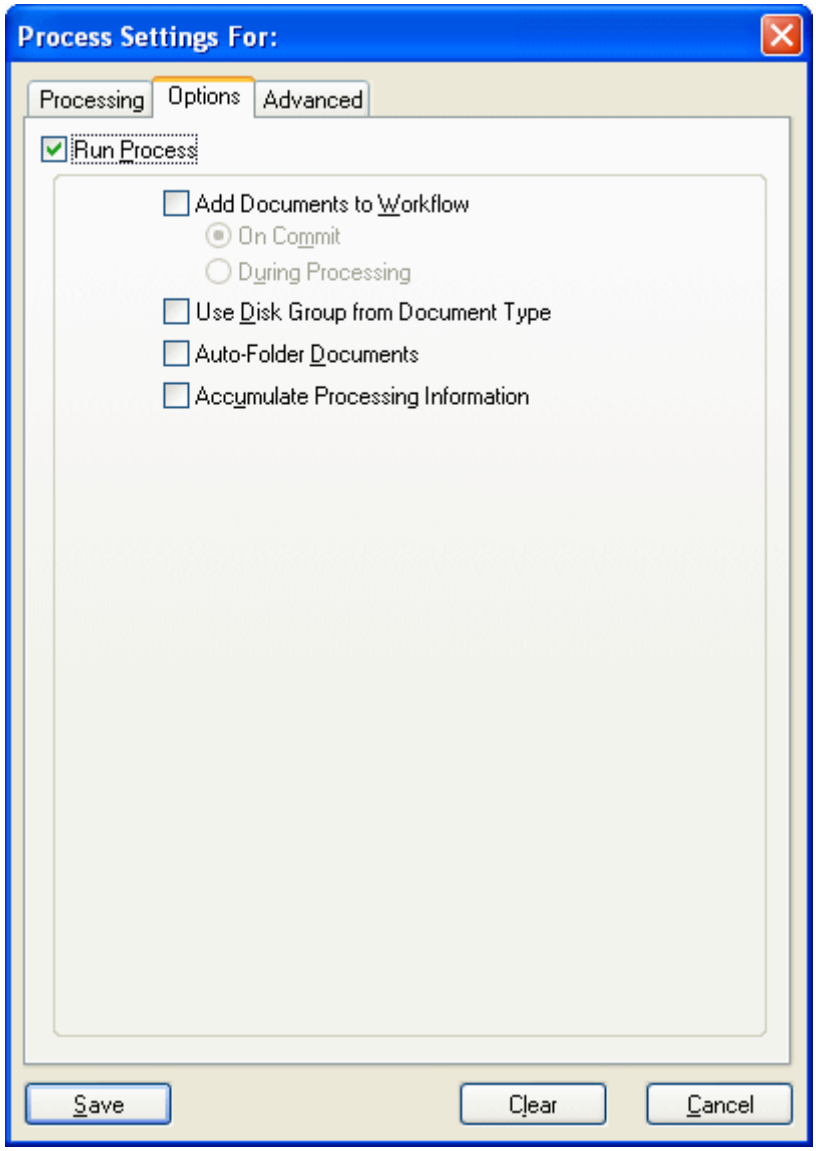
Using the **Disk Group** drop-down, select the OnBase Disk Group that the documents in the processed batches are to be stored in.

If the import file was created using a different ASCII code page, use the **Language Conversion** drop-down to specify the language associated with the ASCII code page the import file was created with.

Note: The **Language Conversion** option is only used for legacy language conversions. For most systems, the default **<NO CONVERSION>** option should be selected. Contact your first line of support before changing this option.

The Options Tab

The **Options** tab contains options that specifically affect the documents that are imported as part of the batch.



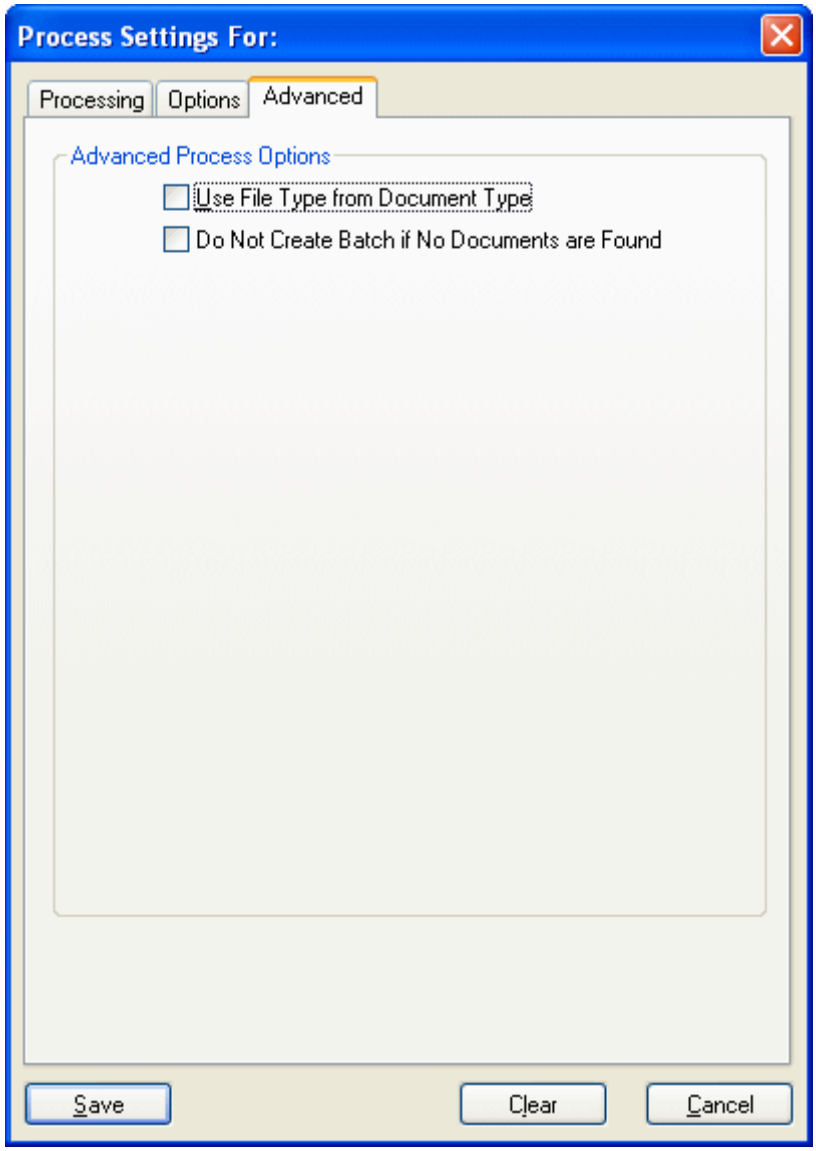
The following options are displayed on the **Options** tab:

Options Tab Options	Description
Run Process	This check box is used to enable the process to store the documents identified from the import file in OnBase. It is selected by default. The **Run Process** check box must be selected in order for the process to actually import documents into OnBase. The ability to deselect this option is provided to allow you to test formats without saving documents to OnBase. If the **Run Process** check box is not selected, the EDI 835 process does not import documents into OnBase. The **Download** and **Preprocess** functions are performed regardless of whether the **Run Process** check box is selected. If the processor encounters an error within the import file, the import file is moved from its current folder to the **ERROR_FILES** sub-folder. **Note:** If an error occurs, the import file is moved to the **ERROR_FILES** folder even if it is marked as read-only.
Add Documents to Workflow	**Note:** To use this option you must be properly licensed for Workflow. **Note:** Documents can only be added to Unity Life Cycles from the Core-based OnBase Client interface. The processed documents are placed into any Workflow Life Cycle associated with the Document Type that the documents belong to. Once the **Add Documents to Workflow** option is selected, you can: • Select **During Processing** to add the documents to a workflow as they are processed. • Select **On Commit** to bring documents into the Workflow when a batch is committed. When using the Core-based OnBase Client interface, if one or more documents are not successfully added to Workflow, the batch will be added to the **Committed** queue. When using the classic OnBase Client interface, if one or more documents are not successfully added to Workflow, the batch will be added to the **Incomplete Commit** queue. **Tip:** When using the Core-based OnBase Client interface, it is recommended that you always select **On Commit**. **Caution:** When using the Core-based OnBase Client interface, it is required that you select **On Commit** if your Workflow Life Cycle is configured to perform any System Work.

Options Tab Options	Description
Use Disk Group from Document Type	Select this option to store documents in the batch in the default Disk Group associated with their Document Type instead of the Disk Group associated with the process format. If this option is selected, both the Disk Group assigned to the process format and the Disk Group assigned to the Document Type(s) are checked to ensure they have sufficient disk space available before the documents are placed. If there is not enough available space in the Disk Group, the batch is routed to the **Incomplete Process** queue, an error message is displayed and the import file is sent to the **Error_Files** directory. If **<none>** is selected in the **Disk Group** drop-down menu when this option is selected, a check for space will not be performed on a Disk Group.
Auto-Folder Documents	Provides the ability to Auto-Folder documents upon import. **Note:** Selecting this check box sets the default behavior for Auto-Foldering documents upon import. However, if a user has the ability to initiate processing from within the OnBase Client, s/he has the ability to de-select this feature when initiating the process by deselecting the **Create Auto Folder** option. **Tip:** Ensure you have Auto-Foldering properly configured before selecting the **Auto-Folder Documents upon Processing** check box.
Accumulate Processing Information	Provides the ability to combine several Verification Reports into a single, cumulative daily report. After process is run, OnBase produces and displays a Verification Report for the process. If your solution uses several different processors or process formats, you can combine each of these Verification Reports into a single, daily report for ease of viewing by selecting the **Accumulate Processing Information** check box. The Verification Report is stored as a text document in the **System Documents** Document Type Group, **SYS Verification Reports** Document Type.

The Advanced Tab

The **Advanced** tab contains advanced processing options that affect the batches imported via the process format.



The following option is displayed on the **Advanced** tab:

Advanced Tab Options	Description
Use File Type from Document Type	The file type of documents imported via the process may differ from the default file format associated with the Document Type. Selecting the **Use File Type from Document Type** check box forces OnBase to use the default file format of the Document Type for the documents imported via the process format.
Do Not Create Batch if No Documents are Found	Select this option to have OnBase check the processing directory before attempting to run the EDI 835 process to determine if there are any files to be processed residing within it. If no files to be processed reside in the processing directory, then the process is not run. **Tip:** Selecting this option reduces the number of unnecessary Verification Reports generated by OnBase (i.e., no Verification Reports are generated for processes that do not actually import any documents into OnBase.

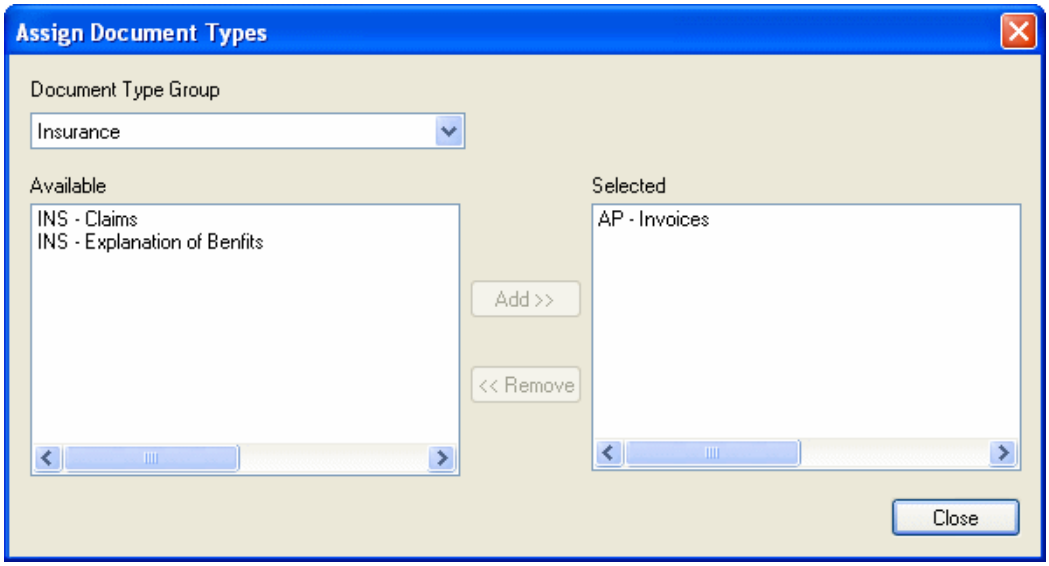
Configuring the EDI 835 Document Types

Upon import into OnBase, documents are assigned to a Document Type.

In order to allow documents imported via the EDI 835 process format to be assigned to a Document Type, the Document Type must first be assigned to the EDI 835 process format. Documents cannot be assigned to Document Types that have not been assigned to the EDI 835 process format.

To assign a Document Type to the process format:

1. From the OnBase Configuration module, click **Import** | **EDI Import** | **EDI Import Processor**. The **EDI Process Configuration** dialog box is displayed.
2. Select the process format to be configured and click **Document Types**. The **Assign Document Types** dialog box is displayed.



3. Select the Document Type that is to be assigned to the process format from the Available list and click **Add>>**. The selected Document Type is moved to the Selected list.

   To disassociate a Document Type from the process format, select it in the Selected list and click **<<Remove**. The selected Document Type is moved to the Available list.

Note: Only one document type can be configured for the EDI 835 Process.

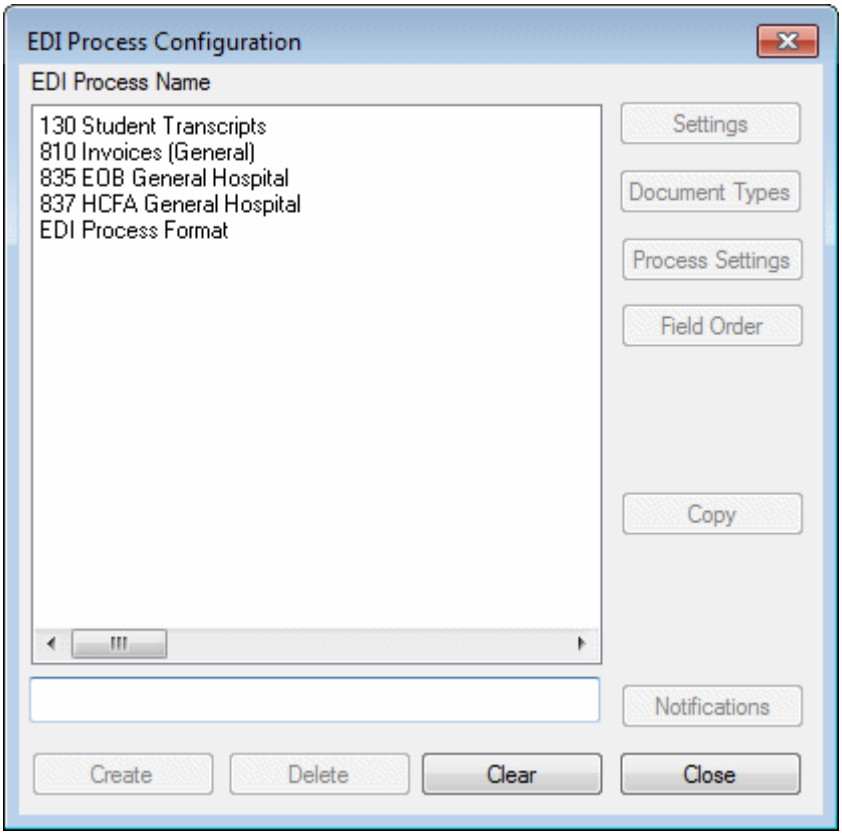
4. When all desired documents have been assigned to the process format, click **Close**.

Configuring the EDI 835 Process Settings

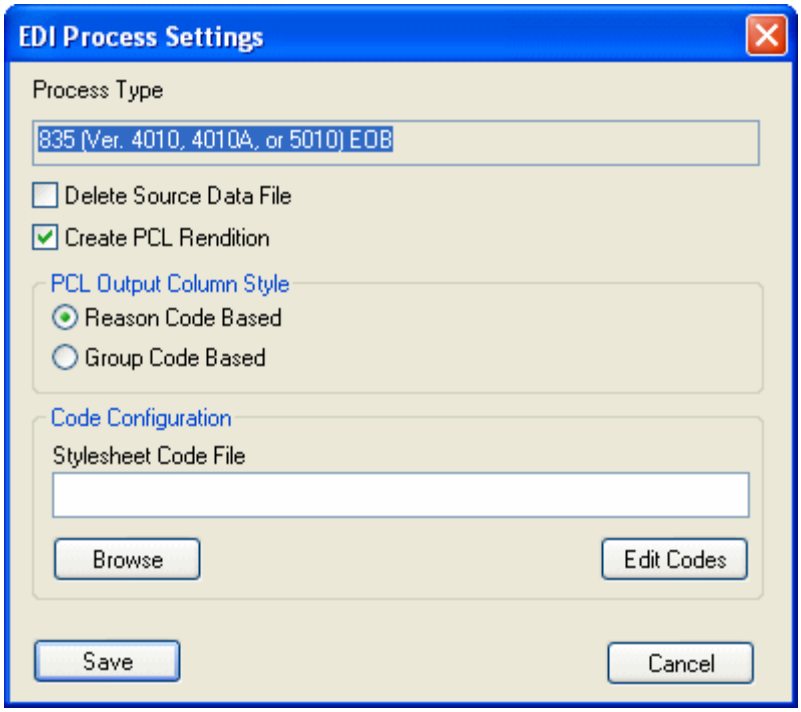
The EDI process settings allow you to configure processor-specific configuration options. The options that are enabled depend on the type of EDI processor you are configuring.

To configure EDI process settings:

1. From the OnBase Configuration module, click **Import** | **EDI Import** | **EDI Import Processor**. The **EDI Process Configuration** dialog box is displayed.



2. Select the process format that is to be configured and click **Process Settings**. The **EDI Process Settings** dialog box is displayed.



3. Select the **Delete Source Data File** check box to delete the import file after the process is complete.
4. Select the **Create PCL Rendition** check box to create documents that can be viewed as an XML document or as a PCL document.

   If the **Create PCL Rendition** check box is selected, the PCL Output Column Style options are enabled. Select either the **Reason Code Based** or **Group Code Based** radio button, depending on how the PCL-formatted document should be displayed.

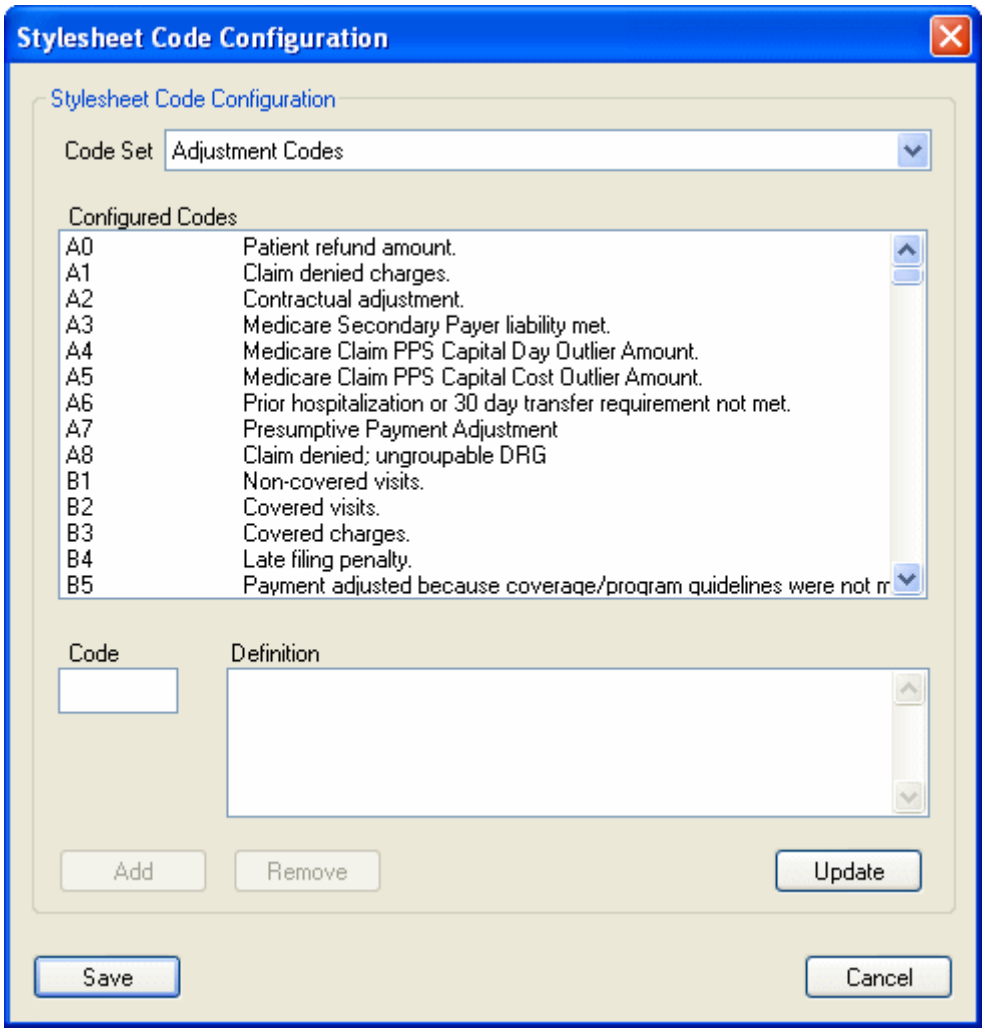
5. The Code Configuration options allow you to customize Adjustment and Remark codes.

Note: These options are only supported for use with legacy style sheets. They are not supported for use with the current version of the **835Config.xml** file provided with your solution files. For information on customizing the current **835Config.xml** file, see the **ReadMe_835.doc** file provided with your solution files.

To customize Adjustment and Remark codes:

a. Enter the full path to a EDI XML style sheet in the **Stylesheet Code File** field, or click **Browse** to browse to it.

b. Click **Edit Codes**. The **Stylesheet Code Configuration** dialog box is displayed.



c. Use the **Code Set** drop-down to select the type of codes to be edited.

d. Select the code to be edited from the Configured Codes list. The selected code is displayed in the **Code** and **Definition** fields.

e. To modify the code, modify the number in the **Code** field and/or the text in the **Definition** field and click **Update**.

To remove the code from the Configured Codes list, click **Remove**.

f. To add a new code, enter a number into the **Code** field, enter text (or select existing text) in the **Definition** field and click **Add**.

g. Click **Save**. The **Stylesheet Code Configuration** dialog box is closed.

6. Click **Save**. The **EDI Process Settings** dialog box is closed.

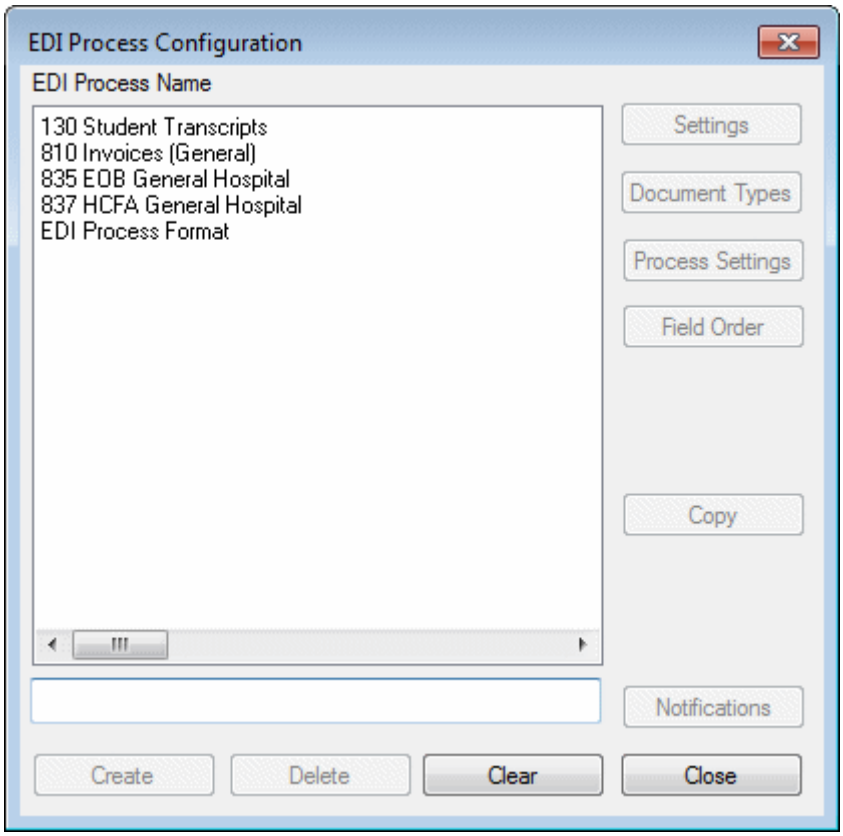
Configuring the EDI 835 Field Order

During import, the EDI 835 processor parses an import file into multiple documents. Data in the import file is structured in a way so that it can be identified by its field code; field codes can be mapped to OnBase Keyword Types so that the data is stored as a Keyword Value for the document being imported. This mapping is referred to as the process format's field order configuration.

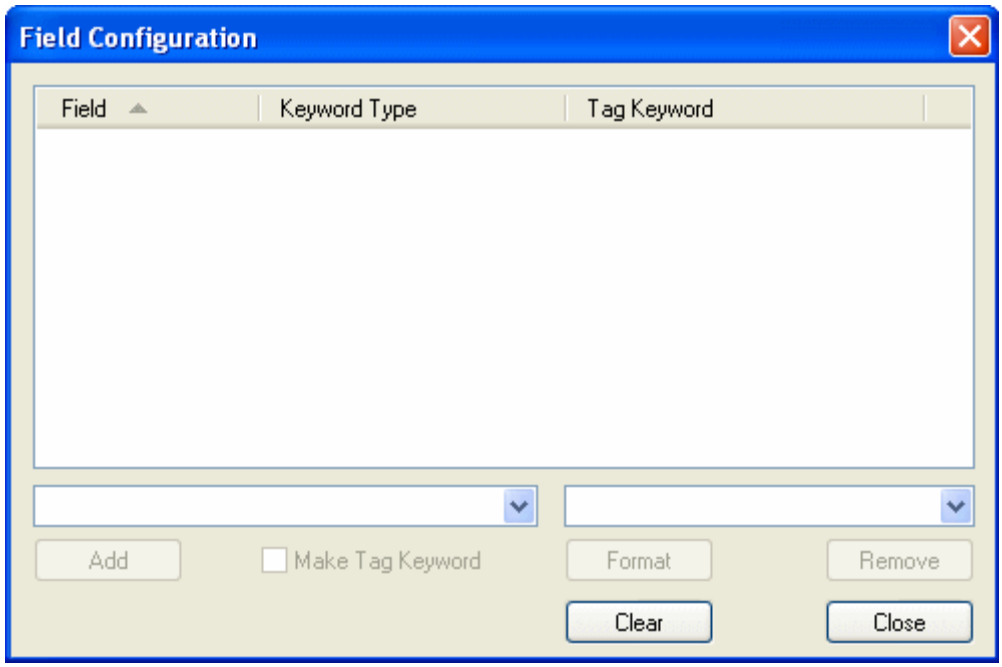
Note: For additional information on how the EDI 835 processor identifies and assigns values from the import file to OnBase Keyword Values, see Keyword Considerations for the EDI 835 Processor on page 27.

To configure a process format's field order:

1. From the OnBase Configuration module, click **Import | EDI Import | EDI Import Processor**. The **EDI Process Configuration** dialog box is displayed.



2. Select the process format to be configured and click **Field Order**. The **Field Configuration** dialog box is displayed.



3. Using the **Field** drop-down, select the field code that you would like to map to the OnBase Keyword Type.

Note: OnBase is pre-configured to recognize a number of field codes for each EDI processor by default. For a complete listing of all of OnBase's pre-configured field codes for each EDI processor, see Default Field Codes on page 21. Your solution may require the creation and configuration of additional field codes; see Creating EDI 835 Field Codes on page 47 for more information on manually creating EDI field codes.

4. Using the **Keyword Type** drop-down, select the OnBase Keyword Type you would like to map to the selected field code.

   You may also elect to map the selected field code to the document's **Document Date** value by selecting **>>Document Date**.

Note: When EDI fields are mapped to OnBase Keyword Types that are part of a Single-Instance Keyword Type Group, only the field's primary XPath is used, regardless of the field's secondary XPath configuration.

5. If the OnBase Keyword Type that the selected field code is being mapped to is part of a Multi-Instance Keyword Type Group and you would like to add the Keyword Value represented by this field code to every instance of a document's Multi-Instance Keyword Type Group, select the **Make Tag Keyword** check box.

Tip: For more information on using Multi-Instance Keyword Type Groups with the EDI 835 processor, see Multi-Instance Keyword Type Groups on page 27.

6. Click **Add**. The field order mapping is added to the Field/Keyword Type list.

Note: If the length of the field code exceeds the maximum configured length of the OnBase Keyword Type it is mapped to, the Keyword Value is truncated to the maximum value allowable for the Keyword Type.

7. Once the field order mapping is added to the Field/Keyword type list:
   - If the Keyword Type that the field code is mapped to is a currency or date Keyword, ensure that it is formatted correctly by selecting the field order mapping and clicking **Format**.

     For information on formatting a currency Keyword, see Currency Formatting Options on page 78.

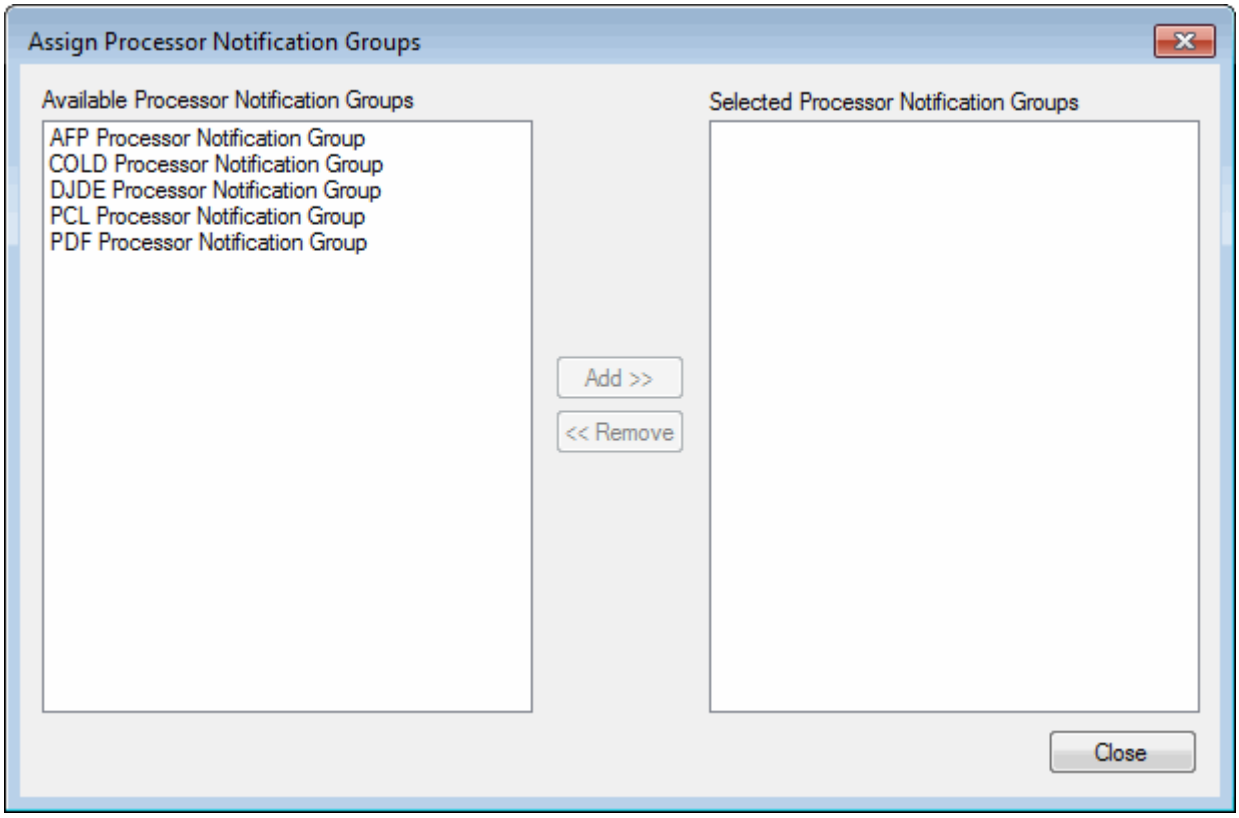
     For information on formatting a date Keyword, see Date Formatting Options on page 80.
   - To remove an existing field order mapping, select it from the Field/Keyword Type list and click **Remove**.
   - To deselect the currently-selected field order mapping, click **Clear**.
8. Repeat Steps 3-7 for each field order mapping that you would like to create for the process format.
9. Click **Close**.

Assigning Processor Notification Groups

You can assign an existing Processor Notification Group to a configured Process Format. When a Processor Notification Group is assigned to a Process Format, notifications will be sent out whenever any of the related Processor Notifications are triggered. For information on configuring Processor Notifications, see the Configuring Processor Notifications section of this documentation.

To assign a Processor Notification Group to a Process Format, follow these steps:

1. In the Configuration module, select **Import** | **EDI Import** | **EDI Import Processor**. The **EDI Processor Configuration** dialog box is displayed.
2. Select the **Notifications** button. The **Assign Processor Notification Groups** dialog box is displayed.



3. Select one or more Processor Notification Groups from the **Available Processor Notification Groups** list, then click **Add>>**.

Note: You can remove Processor Notification Groups that have been assigned to a Process Format by selecting that group from the **Selected Processor Notification Groups** list and clicking **<<Remove**.

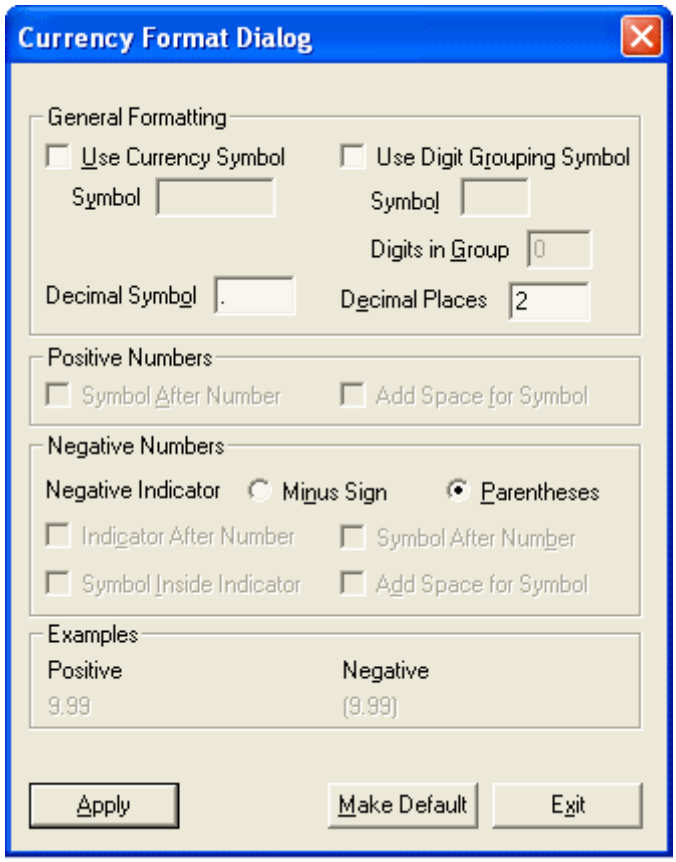
4. Click **Close**.

Currency Formatting Options

Currency formats are used to specify the format of data in the import file that is used to populate the Currency Keywords associated with the documents imported via the EDI 835 process format.

To configure a currency format:

1. Select the field order mapping to be configured. If the Keyword Type that is part of the field order mapping is a Currency or Date Keyword, the **Format** button is enabled.
2. Click **Format**. The **Currency Format** dialog box is displayed.



Tip: The **Examples** section demonstrates how the values configured to use the Currency Format are displayed.

3. In the General Formatting section, you may select either or both of the following options:
   - **Use Currency Symbol**—Select this check box if the value uses a currency symbol, such as a **$**. Enter the symbol used in the **Symbol** field.
   - **Use Digit Grouping Symbol**—Select this check box if the value uses a digit-grouping symbol. A comma (**,**) is commonly used as a digit-grouping symbol (i.e., 1,000,000). Enter the symbol used in the **Symbol** field.

Note: The Digit Grouping Symbol and Decimal Symbol cannot be the same.

   - **Digits in Group**—Identifies the number of symbols that are separated by a digit-grouping symbol. This number is commonly 3 (e.g. 1,000,000). Enter the number in the **Digits in Group** field.

- **Decimal Symbol**—Identifies the symbol used to identify decimal value spacing. This symbol is commonly a period (**.**) (e.g. 1,000,000.99). Type the symbol in the **Decimal Symbol** field.

Note: The Digit Grouping Symbol and Decimal Symbol cannot be the same.

- **Decimal Places**—Identifies the number of digits that follow a decimal symbol. This number is commonly 2. Enter the number in the **Decimal Places** field.

4. If the **Use Currency Symbol** check box is selected, the options in the Positive Numbers section are enabled. Select one or both of the following options:
   - **Symbol After Number**—Select this check box for positive numbers in which the currency symbol is displayed after the number. (e.g. 1,000.00$).
   - **Add Space for Symbol**—Select this check box if there is a space in the text between the number and the currency symbol (e.g. $ 1,000.00 or 1,000.00 $).
5. In the Negative Numbers section, select from the following options:
   - **Negative Indicators**—Select either the **Minus Sign** or **Parentheses** radio button to identify how a negative value as a negative number. is displayed.

     Once a **Negative Indicator** radio button is selected, check one or more of the following display options for negative numbers:
     - **Indicator After Number**—Select this check box if the negative indicator symbol is to be displayed after the value.

Note: Applies to minus sign (**-**) only.

     - **Symbol Inside Indicator**—Select this check box if the currency symbol is to be displayed after the value and before the indicator (e.g. 1,000,000 $-).

Note: Applies to minus sign (**-**) only.

     - **Symbol After Number**—Select this option if the currency symbol is to be displayed after the negative number.
     - **Add Space for Symbol**—Select this option if a space ( ) appears after the currency symbol. (i.e., - $1,000,000).
6. Click **Apply** to assign the configured currency format or click **Make Default** to apply the configured currency format and to the set the configured settings as default for all Currency Keywords.

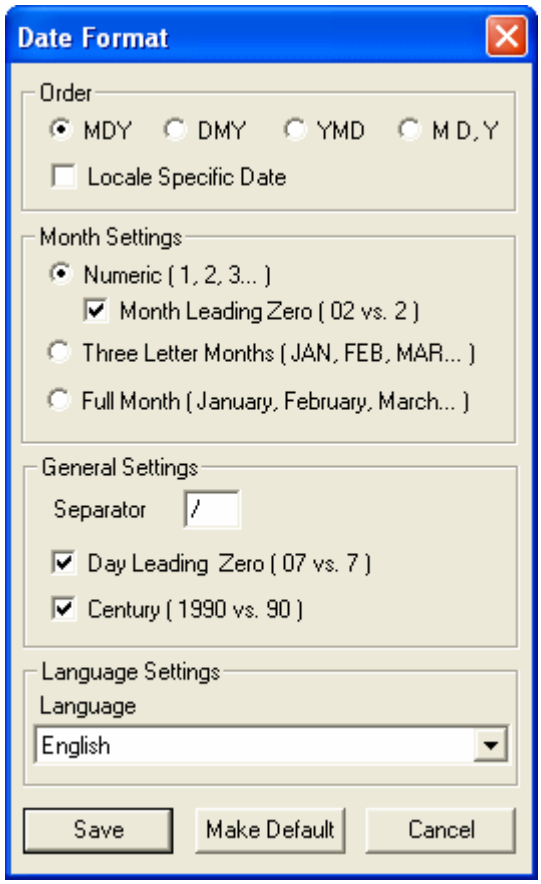
   Click **Exit** to close the **Currency Format Dialog** dialog box without applying any configuration settings.

Date Formatting Options

Date formats are used to specify the format of data in the import file that is used to populate the Date Keywords associated with the documents imported via the process format.

To configure a date format:

1. Select the field order mapping to be configured. If the Keyword Type that is part of the field order mapping is a Currency or Date Keyword, the **Format** button is enabled.
2. Click **Format**. The **Date Format** dialog box is displayed:



3. In the **Order** section, select the radio button that specifies how the order that the month, day, and year are presented in the import file, where **M** represents Month, **D** represents Day, and **Y** represents Year.

   If your import file contains date values that cannot be described by these options, select the **Locale Specific Date** check box to use your operating system's locale. For this option to function correctly, the language selected in the **Language** drop-down must match the language selected in the workstation's Regional Settings.
4. In the **Month Settings** section, select the radio button that specifies how the month value of the date is presented in the import file.
   - **Numeric**. Select this radio button if the month is represented by a number (e.g., January = 1). If the month value is always represented by two digits (e.g., January = 01), select the **Month Leading Zero** check box.
   - **Three Letter Months**. Select this radio button if the month is represented as an uppercase, three-letter abbreviation (e.g., JAN, FEB, MAR).
   - **Full Month**—Select this radio button if the month is spelled out in its entirety (e.g., January, February, March).

5. Enter the character used to separate Month, Day and Year values in the **Separator** field.

   A forward slash (/) is commonly used as a date separator. A space ( ) is also a valid separator value.
6. Select the **Day Leading Zero** check box if all days are represented by two digits. Days 1-9 are preceded by zeroes. (e.g., the first day of the month=01).
7. Select the **Century** check box if the year value consists of four digits instead of two (i.e., 1990 vs. 90).
8. Use the **Language** drop-down list to select the language in which the date is written so that OnBase can translate the value into a format it is able to recognize.

   Only languages currently supported by OnBase are displayed. For more information on languages supported by OnBase, contact your solution provider.

Note: For some Japanese dates, a preprocessor must be used to translate the dates into OnBase-supported characters.

Note: If you have selected the **Local Specific Date** option, the language selected in the **Language** drop-down must match the language selected in the workstation's Regional Settings.

9. Click **Save**.

Configuring Processor Notifications

Processor Notifications can be configured to report the status of an import process to a configured user. Processor Notifications can be configured to send messages when a processing event occurs (for example, when the processor is executed, or when a batch is successfully committed). This can provide a convenient way to quickly discover the status of an import process, without needing to open and view a Verification Report.

Configuring Processor Notifications consists of the following components:

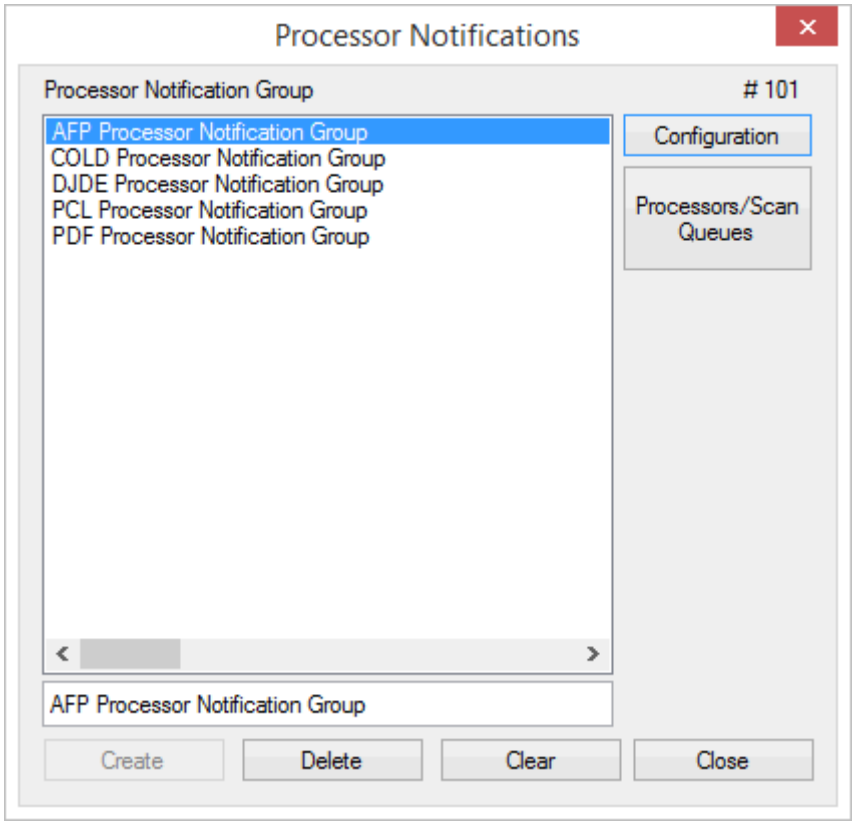
- Configuring a Processor Notification Group - see page 82 for more information.
- Configuring a Processor Notification - see page 85 for more information.
- Configuring the Distribution Service - see page 91 for more information.

Configuring a Processor Notification Group

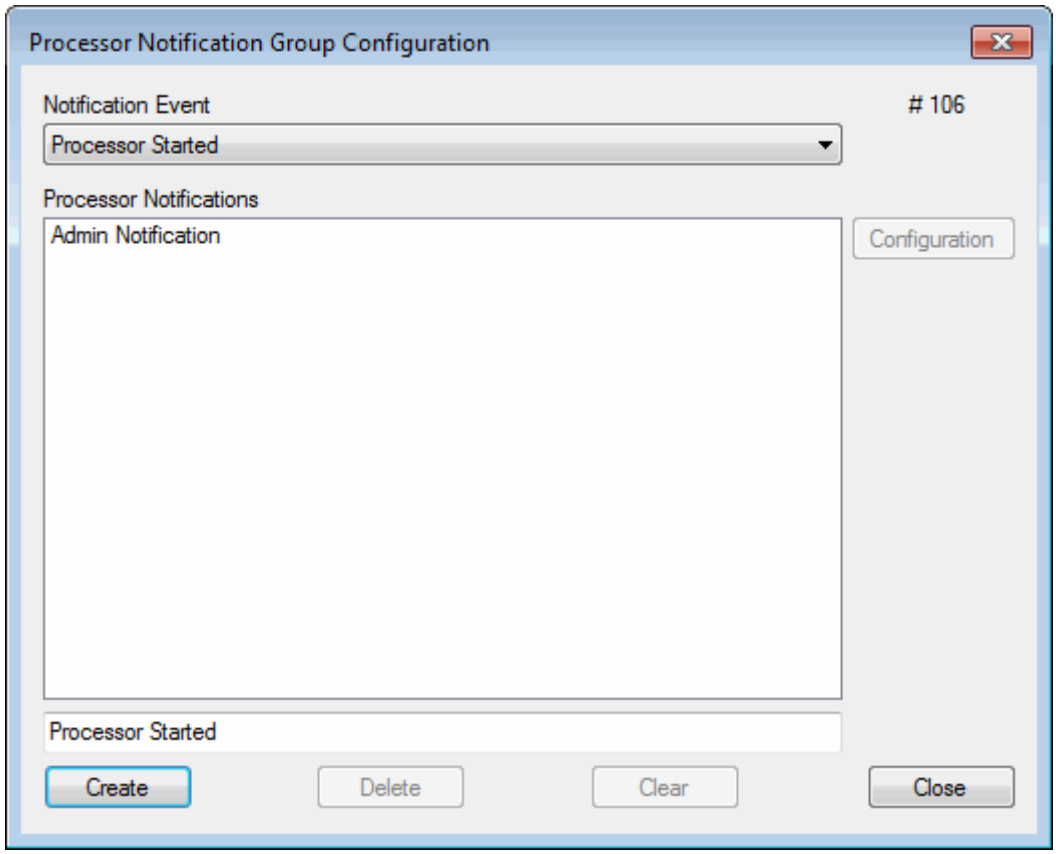
Processor Notification Groups are used to store Processor Notifications. Processor Notification Groups can then be assigned to existing process formats so that notifications are sent for that process when certain processing events occur.

To create a Processor Notification Group, follow these steps:

1. In the Configuration module, select **Import** | **Processor Notifications**. The **Processor Notifications** dialog box is displayed.



2. Type the name of a new Processor Notification Group and click **Create**. Your new Processor Notification Group is created, and the **Processor Notification Group Configuration** dialog box is displayed.



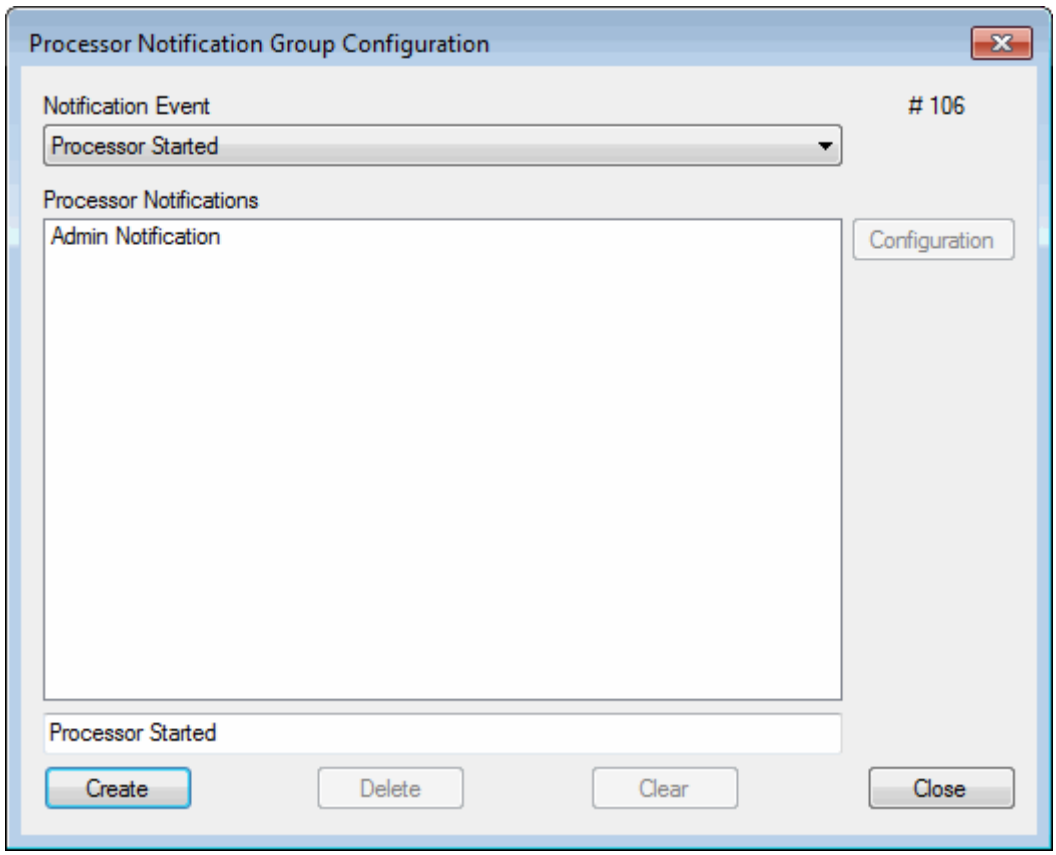
Continue on to Configuring a Processor Notification on page 85 for information on creating Processor Notifications.

Configuring a Processor Notification

Once you've created a Processor Notification Group, you can configure Processor Notifications for that Processor Notification Group. Processor Notifications can be configured to send messages when a processing event occurs (e.g., when the processor is executed, or when a batch is successfully committed).

Note: Processor Notifications will only be sent if the processor is run as a scheduled process. If the processor is run manually in OnBase, no notifications will be sent.

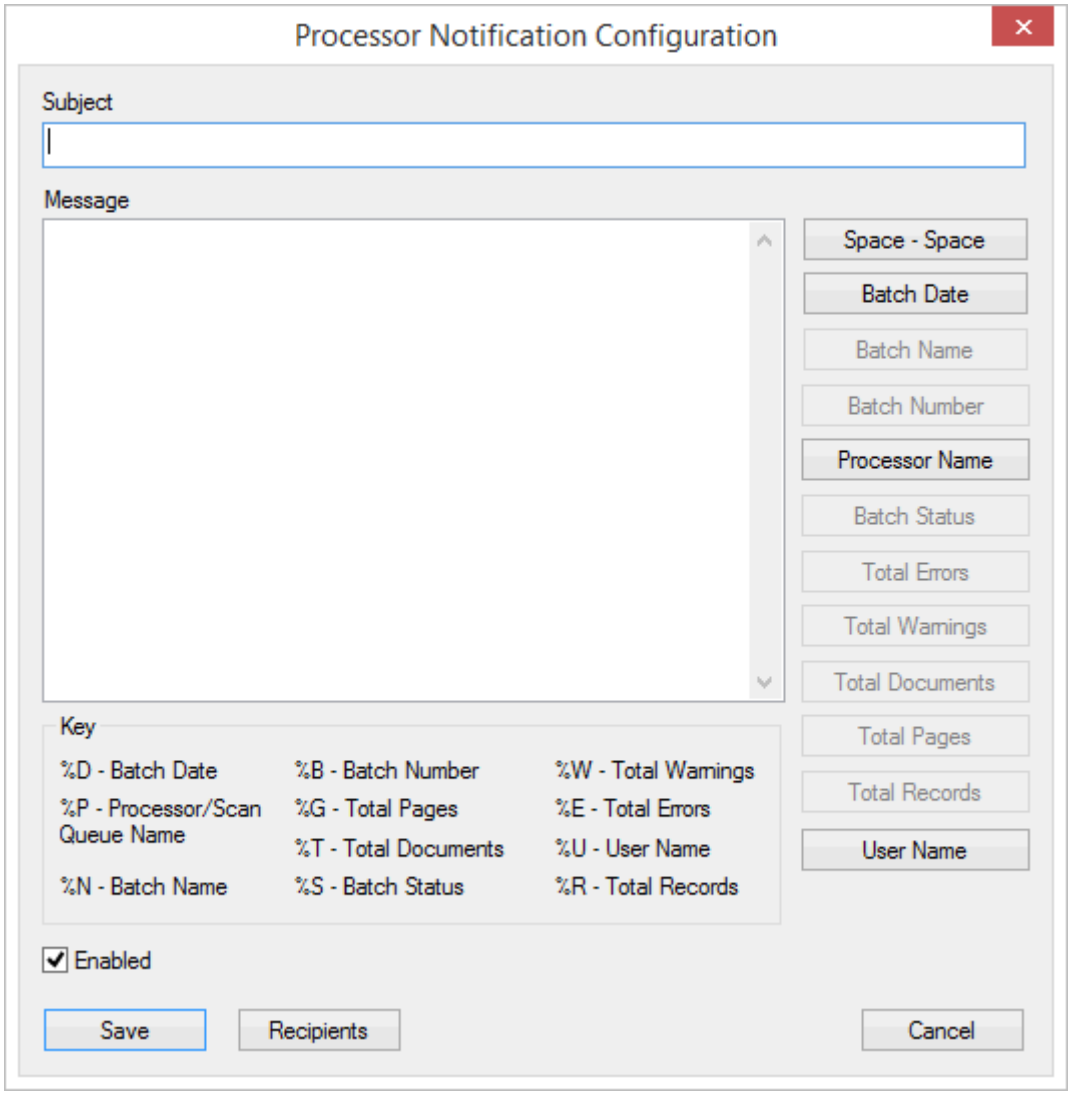
1. Select an existing Processor Notification Group and click **Configuration**. The **Processor Notification Group Configuration** dialog box is displayed.



2. Select a Notification Event from the **Notification Event** drop-down list. The following options are available:
   - **Processor Started** - notifications of this type will be sent when an associated process begins.
   - **Batch Success** - notifications of this type will be sent when an associated process successfully finishes processing a batch.
   - **Batch Fail** - notifications of this type will be sent when an associated process fails to finish processing a batch.

- **Processor Completed** - notifications of this type will be sent when an associated process successfully finishes processing multiple batches configured to run as a single process.
- **Batch Committed** - notifications of this type will be sent when an associated process commits a batch of documents.

3. Type a name for your new Processor Notification in the text field at the bottom of the window, then click **Create**.
4. Select your new Processor Notification and click the **Configuration** button. The **Processor Notification Configuration** window is displayed.



5. Enter text in the **Subject** and **Message** fields. You can also include Keyword Type symbols that are described in the table below. To add a symbol, either click inside the field and type the symbol, or click the symbol's button from the right side of the dialog box.

Note: In the **Message** field, you can use HTML tags to format your email notifications (e.g., format the font, embed images and logos). An <html> tag should designate the point you'd like the HTML formatting to begin. For example:

```
<html>
<body>
<font size="6" face="arial" color="red">Greetings, </font>
<b>Sincerely,</b>
<img src="logo.gif/>
</body>
</html>
```

The client's default email format must be HTML.

Note: If you want to include the percent sign (%) in notification text, you must place two percent signs (%%) to represent that percent sign. If only one percent sign is entered, the percent sign will not display in the notification text.

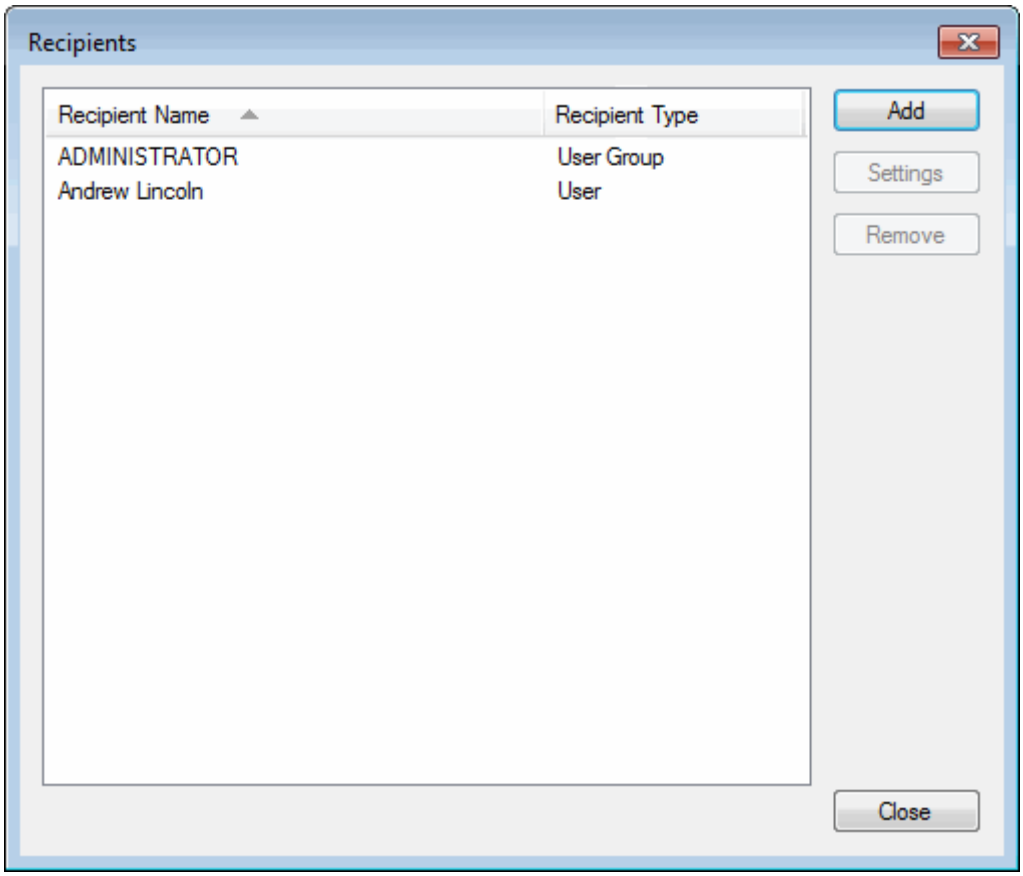
Note: If you select to send process notifications using OnBase internal mail, only 250 characters of a message are displayed in the internal mail message pane.

The following symbols can be used, depending on the type of notification event:

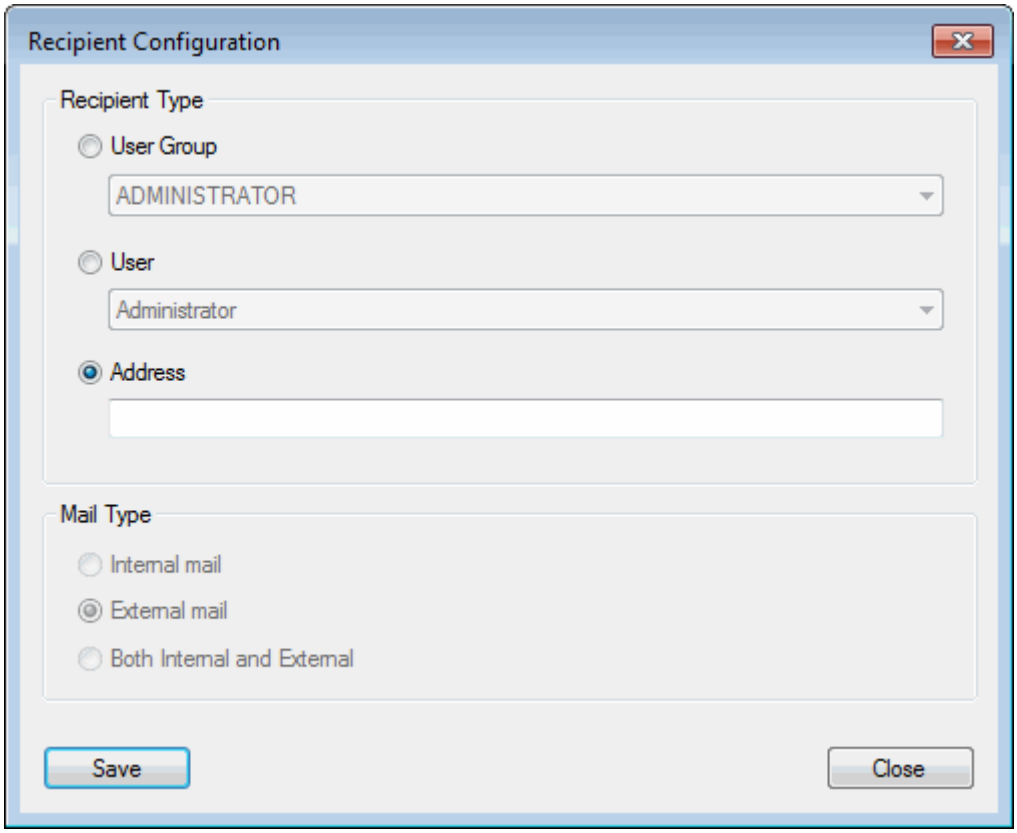
Symbol	Description	Event Used For
%D	Displays the Batch Date.	Available for all notification events
%P	Displays the name of the processor used to process the documents.	Available for all notification events
%N	Displays the name of the batch of documents.	**Batch Success, Batch Fail, Batch Committed**
%B	Displays the Batch Number assigned to the batch.	**Batch Success, Batch Fail, Batch Committed**
%G	Displays the total number of pages processed.	**Batch Success, Batch Fail**
%T	Displays the total number of documents in the batch.	**Batch Success, Batch Fail**
%S	Displays the status of the batch.	**Batch Committed**

Symbol	Description	Event Used For
%W	Displays the number of warnings generated for the batch.	**Batch Success, Batch Fail**
%E	Displays the number of errors generated for the batch.	**Batch Success, Batch Fail**
%U	Displays the user name of the currently logged in user who executed the process.	Available for all notification events
%R	Displays the number of records successfully imported. **Note:** This symbol is only applicable to AutoFill Keyword Set processors.	**Batch Success, Batch Fail**

6. Ensure that the **Enabled** option is selected.
   To disable the processor notification from being sent to users, deselect the **Enabled** option.
7. Click the **Recipients** button. The **Recipients** dialog box is displayed.



8. Click **Add**. The **Recipient Configuration** dialog box is displayed.



9. Select a **Recipient Type**. The following options are available:
   - **User Group** - select this option to send the notification to all members of an OnBase User Group. Select the User Group to receive the notification using the associated drop-down list.
   - **User** - select this option to send the notification to an OnBase user. Select the user to receive the notification by selecting his or her OnBase user name in the associated drop-down list.

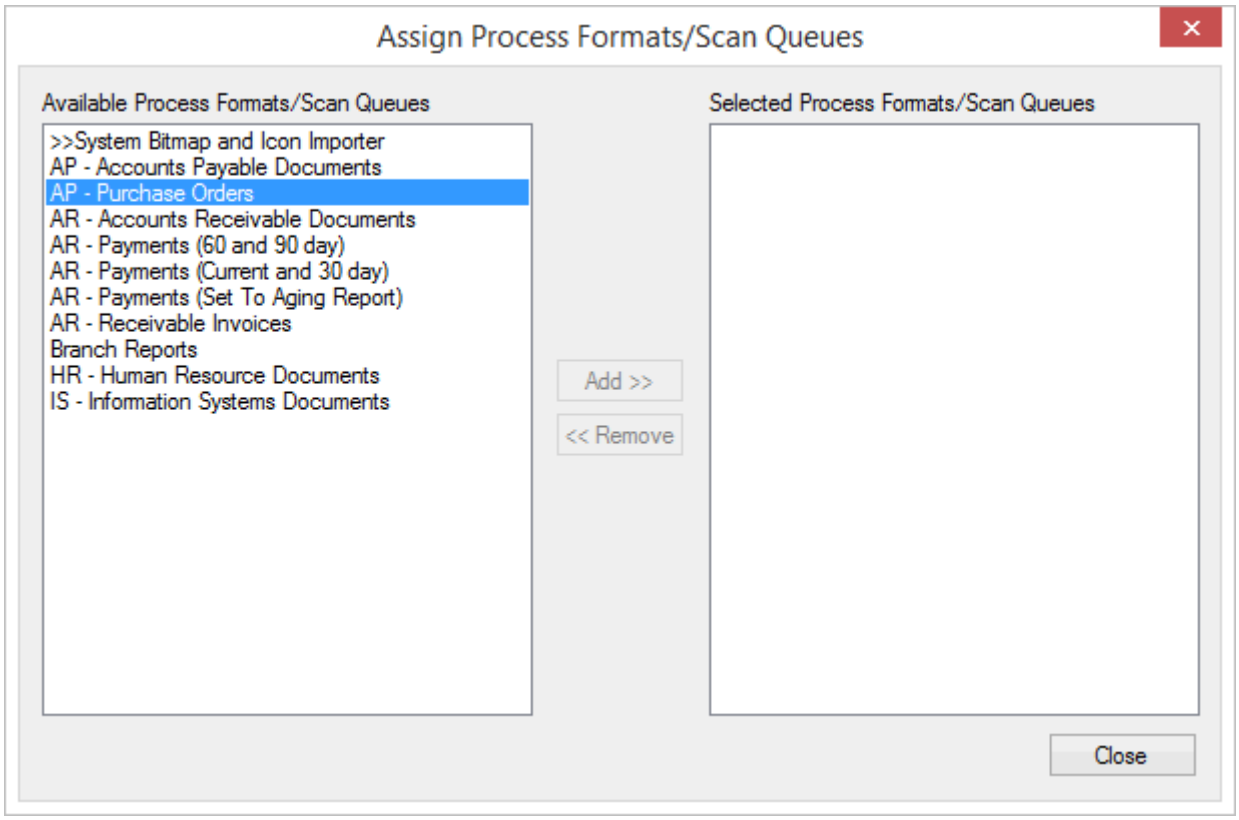
Note: If the selected user account is deleted, that user account will be automatically removed from the **Recipients** list.

- **Address** - select this option to send the notification to the email address specified in the associated field.

If you selected the **User Group** or **User** option as the Recipient Type, the **Mail Type** options are enabled. The following options are available:

- **Internal mail** - when this option is selected, notifications will be sent to the selected user(s) via OnBase internal mail.
- **External mail** - when this option is selected, notifications will be sent to the selected user(s) via email. The notification is sent to the email address configured for the user in the **User Settings** dialog box. For more information, see the **System Administration** documentation.
- **Both Internal and External** - when this option is selected, notifications will be sent to the selected user(s) via both OnBase internal mail and email.

10. Click **Save**. You are returned to the **Recipients** dialog box.
11. Once you have added all desired recipients, click **Close**. You are returned to the **Processor Notification Configuration** dialog box.
12. Click **Save**. You are returned to the **Processor Notification Group Configuration** dialog box.
13. Click **Close**. You are returned to the **Processor Notifications** dialog box.
14. Click the **Processors/Scan Queues** button to assign one or more process formats to the configured notification type. The **Assign Process Formats/Scan Queues** dialog box is displayed.



15. Select one or more Process Formats from the **Available Process Formats/Scan Queues** list, then click **Add>>**.

    To remove a Process Format from the **Selected Process Formats/Scan Queues** list, select that Process Format and click the **<<Remove** button.
16. Click **Close**. You are returned to the **Processor Notifications** dialog box.
17. Click **Close**.

Configuring the Distribution Service

Processor Notifications are only sent to external email locations if a Distribution Service is configured and running. For information on configuring a Distribution Service, see the **Distribution Service** module reference guide.

Scheduling Overview

Scheduling processing for off-hours is an automated way to conserve system resources. Processing can be accelerated if the process is run from the database server.

Caution: Ensure that scheduled processes are not configured to run at the same time as a scheduled database backup. The database is locked while performing backups, preventing any processes from running.

Note: Purging documents from Document Maintenance can also be scheduled. For more information, see the **System Administration** module reference guide or help file.

Two types of processing activities may be scheduled with the Scheduler: a Process Format or a Process Job.

- A Process Format is used in processing modules and in scanning modules to specify how OnBase processes data being imported into OnBase. A Process Format is, basically, one individually-configured process.
- A Process Job is one or more Process Formats that have been configured to run sequentially. A Process Job does not have to consist exclusively of a single type of Process Format; it can contain multiple Process Formats from any module that allows scheduling.

Note: Process Formats created from Document Imaging sweep or scan from disk processes cannot be included in a Process Job.

Configuring & Using the Scheduler

Requirements for Configuring/Running a Scheduled Process

To configure a scheduled process, either a Process Format or a Process Job, a user must belong to a User Group with the **Client** and **Client Scheduler** product rights, and he/she must have rights to use the appropriate processing module. A scheduled process can be configured on any OnBase Client workstation, not just the processing workstation or a workstation running with the -**SCHED** command line switch.

To run a scheduled process, OnBase must be running with the -**SCHED** or -**SCHEDINST** command line switch on the processing workstation in order for the scheduled process to be executed at the configured time. The user account logged onto OnBase at this time needs only the **Client** product right in order for the process to be performed.

For more information on using command line switches with your OnBase solution, see the **Command Line Switches** module reference guide.

Using the -SCHED and -SCHEDINST Switches

This section explains the difference between the **-SCHED** and **-SCHEDINST** command line switches.

-SCHED

Some process formats or jobs can be scheduled to run automatically. The -SCHED switch causes the Client to queue these scheduled process formats and jobs for later processing; if the machine running the OnBase Client in Scheduler mode (i.e., running the OnBase Client with the -SCHED command line switch applied) is also the processing workstation, then the process formats or jobs will run at their scheduled times.

In order for the scheduled process format or job to be run, OnBase must be running in Scheduler mode on the processing workstation. If OnBase is not running, or if OnBase is not running in Scheduler mode, then the scheduled processes will not run.

A process format or job can be scheduled from any OnBase Client workstation by a user with the proper rights.

-SCHEDINST

The -SCHEDINST command line switch is very similar to the basic -SCHED switch. When you apply the -SCHEDINST switch to a Client shortcut, you can specify that the selected instance of the OnBase Client should only process jobs assigned to that Client instance's specific instance name.

The format of the switch is -SCHEDINST="MyProcName", where MyProcName is the name of a specific processing instance. The OnBase Client that this switch is applied to will be unable to process any scheduled jobs that are not configured with a **Specific Processing Instance** of MyProcName.

A process format or job can be scheduled from any OnBase Client workstation by a user with the proper rights.

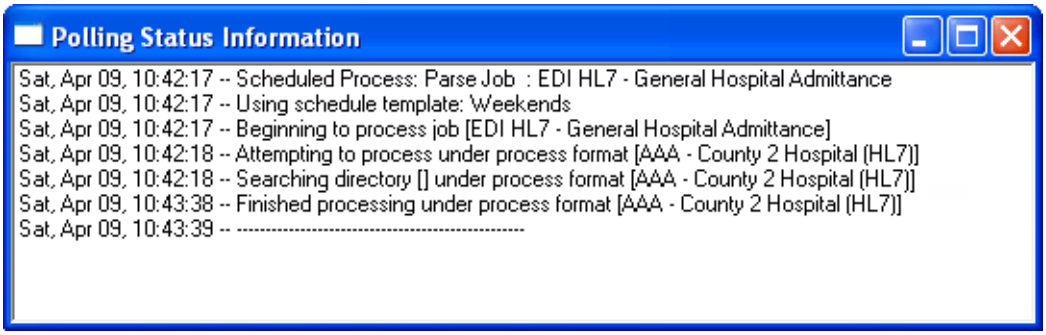
Note: If a scheduled process is assigned to a specific processing instance, it must be run from a client using the -SCHEDINST command line switch. If you try to run this process from a client using the -SCHED switch instead, the process will not be executed.

Verifying the Scheduler is Running

To verify that the Scheduler is running on the processing workstation, click **Window | Polling Status Information** in the OnBase Client.

Note: The **-SCHED** or **-SCHEDINST** command line switch must be applied to the Client shortcut to use this option.

The **Polling Status Information** window is displayed. Information about scheduled processes is displayed in it as the process is run. If this window exists, the Scheduler is running.



Another way to verify the Scheduler is running is to select **Window | System Status**. Both **Process Server Mode** and **Scheduler Mode** will be displayed as **YES**.

Running Multiple Scheduled Processes

Tip: Attempting to run more than one process job or format at once in the same session will result in a dramatic drop in all processing speeds. It is recommended to run a single automated process at a time.

If multiple jobs are configured, they can be performed sequentially in one OnBase Client session on the same workstation. Multiple sessions of the OnBase Client can be run simultaneously on one workstation to process these jobs in parallel; these sessions will coordinate processing tasks to ensure that each job is processed and that a job is not processed more than once.

In order to process jobs in parallel on multiple sessions of the OnBase Client, each session must be OnBase version 9.0 or later. If any one of the sessions is running an earlier version of OnBase, then none of the other sessions will perform any processing while it is processing.

Scheduled Process Configuration Reports

A user belonging to a User Group with the proper rights can run a Scheduled Processes Configuration Report.

This report provides information on all of the scheduled processes (process formats and process jobs) that have been scheduled to run. It is organized by processing workstation, and displays a weekly, monthly and end-of-month schedule, with jobs listed in order by starting time. Once run, this report is stored in OnBase as a document belonging to the **SYS Configuration Reports** Document Type.

Tip: It is considered a best practice to run a new Scheduled Process configuration report each time a new process (such as process format or process job) is scheduled. With the information stored in this report, troubleshooting and communications with Technical Support are greatly improved. Additionally, Configuration Reports are stored in OnBase, so there is a historical record of the structure of your OnBase solution.

For more information on Configuration Reports, including the Scheduled Processes Configuration Report, see the **System Administration** module reference guide or help file.

Working With Process Formats

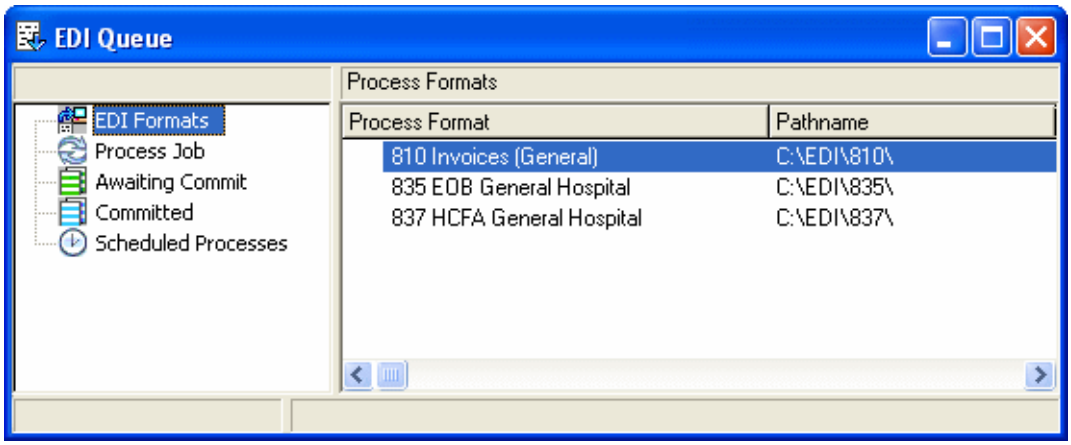
A Process Format is used in processing modules and in scanning modules to specify how OnBase processes data being imported into OnBase. A Process Format is, basically, one individually-configured process.

Creating a Scheduled Process Format

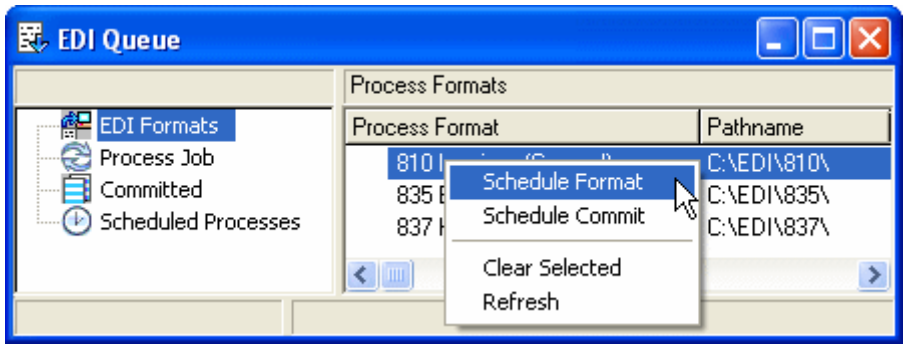
You can add a format to the Scheduler from its process queue by selecting the process format and selecting **Schedule Format** from the right-click menu.

For example:

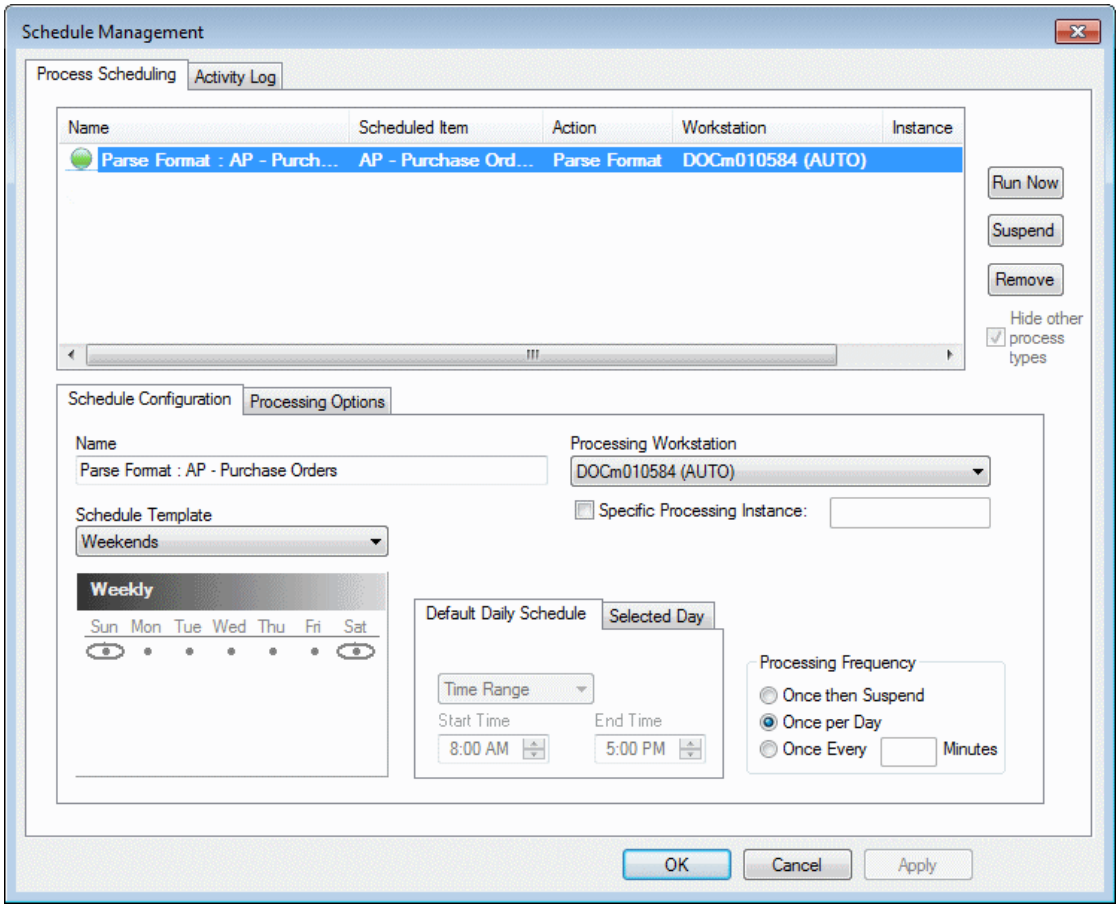
In the OnBase Client, click **Processing** | **EDI**. The **EDI Queue** window is displayed.



Select the process format you would like to add to the Scheduler, then right-click and select **Schedule Format**.



The **Schedule Management** window is displayed.



A new Process Format is added to the **Scheduled Items** box. It is automatically selected.

By default, all scheduled Process Formats (e.g., COLD Process Formats, DIP Process Formats, etc.) are displayed in the **Scheduled Items** box when scheduling a new Process Format. For information on viewing only the Process Formats for the currently-selected process type, see Viewing Scheduled Processes on page 106.

Schedule Configuration

The first options that must be configured for the scheduled process are the Schedule Configuration options on the **Schedule Configuration** tab. This tab is displayed by default.

1. In the **Name** field, enter a name for the scheduled process.
2. Using the **Processing Workstation** drop-down, select the workstation that will be used to run the scheduled process.

Note: This workstation will need to be running with the **-SCHED** or **-SCHEDINST** command line switch in order to run the scheduled process.

3. If you always want the scheduled process to be run from a specific instance of the OnBase Client, select the **Specific Processing Instance**, then enter the name of the instance in the **Specific Processing Instance** text field.

Note: If you select the **Specific Processing Instance** option but leave the **Specific Processing Instance** text field blank, the scheduled process can be run from any instance of the OnBase Client.

4. Using the **Schedule Template** drop-down, select one of the schedule templates for the process or select **<Custom Schedule>** to manually configure the schedule for this process.

Note: For information on creating a **Custom Schedule** or **Schedule Template**, see below.

5. Select how often you would like the scheduled process to run by selecting one of the Processing Frequency radio buttons.
   - **Once then Suspend**. The scheduled item will be processed once, then the scheduled process is suspended.
   - **Once per Day**. The scheduled item will be processed once per day.

Note: If the scheduled item is modified, the process may be run again on the same day.

   - **Once every "" Minutes**. The scheduled item is processed in the interval (measured in minutes) entered in the field. The maximum number of minutes that can be entered is 99999.

Caution: This option is only supported when the **Default Daily Schedule** is set to **Time Range**. If your **Default Daily Schedule** is set to **Specific Time**, the scheduled item will only be processed at the specified time.

6. When you are finished setting the **Schedule Configuration** options, click **Apply**.

Calendar

The calendar is used to select the day(s) on which a scheduled process should be run.

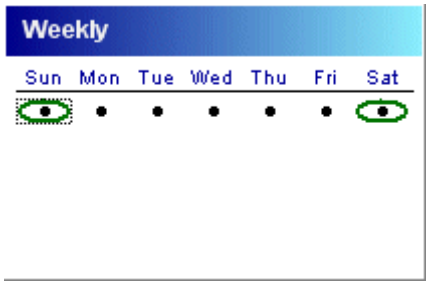
Note: The calendar is displayed based on your Workstation Regional Settings and the OnBase language DLL that you are using.

To change the view of the calendar, click the calendar heading (in the example above, **Weekly**) to display a menu. Select one of the following options to display a different calendar for configuration:

- **Weekly**. Allows you to configure a process to run on a certain day of the week (i.e., Thursday).
- **Monthly**. Allows you to configure a process to run monthly, on a particular date (i.e., the 1st and 15th of the month).
- **Monthly** (Day-Relative). Allows you to configure a process to run on a relative day of the month (i.e., the first Saturday of the month, the 2nd Wednesday of the month).

- **Annual**. Allows you to configure a process to run on a certain day of the year (i.e., June 30).
- **Full Calendar**. Allows you to configure a process to run on specified days of specified years (e.g., August 10, 2011 and/or July 17, 2012).

To select days that you would like to run a scheduled process, double-click the day on the calendar. The selected day is circled.

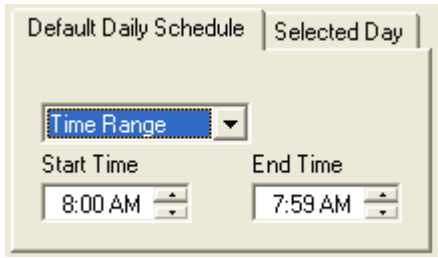


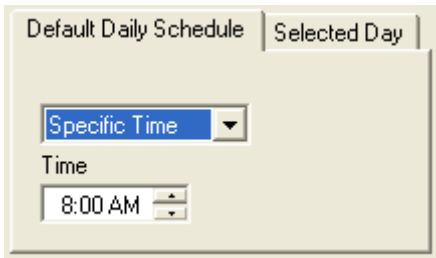
Note: In the example above, two days are selected but **Sunday** is the currently-selected day.

To deselect a day, double-click it.

Default Daily Schedule

The **Default Daily Schedule** tab allows you to configure the processing configuration for all days that do not have a **Selected Day** tab configuration.



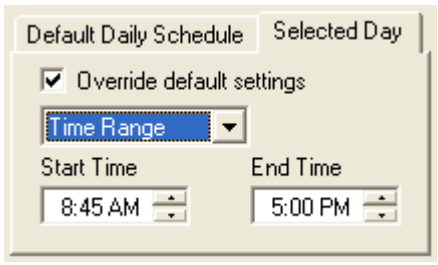


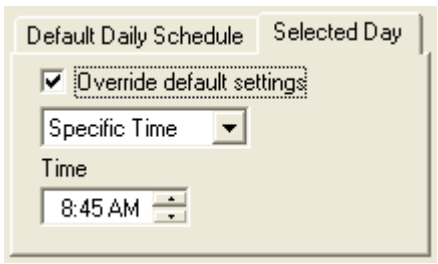
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Selected Day

The **Selected Day** tab allows you to specify settings for the selected day that differ from the settings specified in the **Default Daily Schedule** tab. In order for the **Selected Day** tab to be enabled, you must click a day to select it and you must select the **Override default settings** check box.





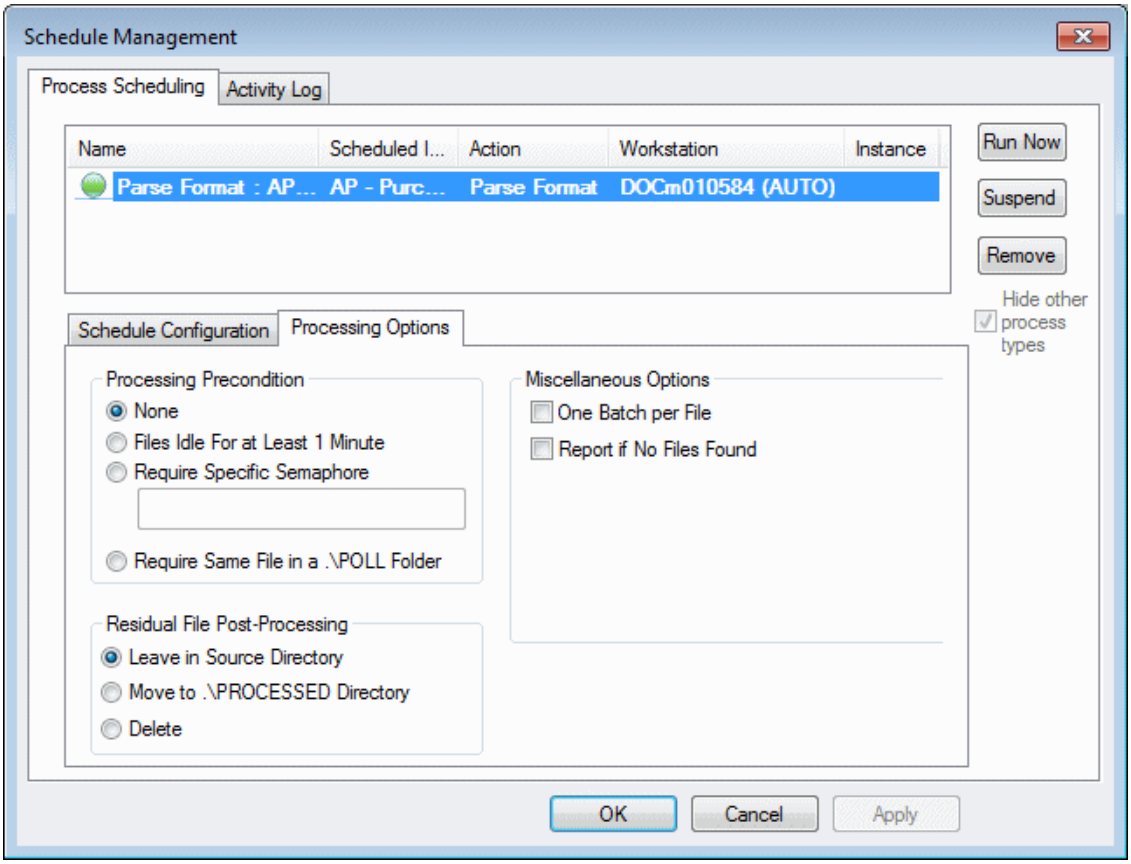
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Processing Options

After the Schedule Options are configured on the Schedule Configuration tab, you must configure the Processing Options.

1. From the **Process Scheduling** tab of the **Schedule Management** window, click the **Processing Options** tab to display the Processing Options.



2. Set the following Processing Options.

Option	Description
Processing Precondition	The **Processing Precondition** options allow you to specify the conditions that must be met before processing can begin. **Note:** These options are not available for scheduled PDF conversions, Advanced Capture processes, Full-Text OCR processes or scheduled commits. • **None**. If this option is selected, no processing precondition is necessary. • **Files Idle For at Least 1 Minute**. Select to indicate that processing must begin after the file indicated in the **Default File Name** of the processing format has been idle for at least one minute. • **Require Specific Semaphore**. Select to indicate that processing must begin after a trigger file is detected. The trigger file can be any file type/size/label and can be written to any location on the network. OnBase will only begin processing the processing file indicated in the **Default File Name** of the process format after the trigger file has been detected. How processing is triggered (definition of the file location and/or time variable) is defined by a semaphore. A semaphore is a technique for coordinating or synchronizing polling activity. A maximum of 255 characters can be entered in this field. The trigger file is deleted after processing. **Note:** If the trigger file is being accessed over FTP, it will not be deleted.

Option	Description
Processing Precondition (cont.)	• **Require Same File in a .\POLL Folder**. Select to indicate that processing must begin after a POLL file has been written to a specifically-configured POLL folder. The POLL file must appear in a folder labeled **POLL**, and the POLL folder must be created as a subfolder of the **Default Directory** of the process format. The name of the POLL file must be exactly identical to the name of the file to be processed. The value in the **Default File Name** field will be used to locate the POLL file. When OnBase locates the POLL file, the processor will attempt to process any file with that same name in the **Default Directory**. For example: The **Default File Name** is ***.txt**, and the **Default Directory** is **C:\ProcessFiles**. The file to be processed is stored in this directory. For this example, the file is named **pf11x74.txt**. The POLL file should be placed in **C:\ProcessFiles\POLL**, and named exactly the same as the process file (**pf11x74.txt**). OnBase will search **C:\ProcessFiles\POLL** for a file that matches the **Default File Name** of ***.txt**. Upon finding the **pf11x74.txt** file, the processor will return to the **C:\ProcessFiles** directory and search for the file named **pf11x74.txt**. This is the file that will be processed. **Note:** This option is not supported for use with the Directory Import Processor.

Option	Description
Residual File Post-Processing	The Residual File Post-Processing options allow you to specify how residual files are processed (that is, files that have been processed but not deleted from the directory, such as read-only files). **Note:** These options are not available for scheduled PDF conversions, Advanced Capture processes, Full-Text OCR processes or scheduled commits. • **Leave in Source Directory**. Select to leave any residual files in the folder they originated in. • **Move to .\PROCESSED Directory**. Select to move any residual files to the OnBase-generated **PROCESSED** folder located in the same folder the files were originally in. **Caution:** Depending on your system's configuration, processed files may be automatically deleted after an import process is run. In this situation, the processed files will not be moved to the **PROCESSED** folder because they have already been deleted from the folder they originated from. Depending on the processor you are using, you may be able to avoid this behavior by modifying the configuration of your import processor, or by marking the files to be processed as read-only. • **Delete**. Select to delete any residual files (that is, files that have been processed but not deleted from the directory) from the folder they originated in. **Note:** The **Delete** option is not available for Scheduled Sweeps or Scan from Disk processes.

Option	Description
Miscellaneous Options	The **Miscellaneous Options** allow you to specify special scheduling options specific to the selected process. The availability of these options varies depending on the type of processor being scheduled. Many processing modules do not have some or all of these options. **Note:** No **Miscellaneous Options** are available for scheduled PDF conversions, Advanced Capture processes, Full-Page OCR processes or scheduled commits. • **One Batch per File**. Select to process each index file as one batch when multiple index files are being processed at once. This option is not supported for use with the Directory Import Processor. • **Report if No Files Found**. Select to create a Verification Report if no files are found when a scheduled format or job is run. **Note:** The **Report if No Files Found** option is only available when the **None** radio button is selected for the **Processing Precondition**. It is not available for scheduled **Sweep** or **Scan from Disk** processes. • **Document Type**. Available for certain scheduled **Sweep** processes. Use the drop-down to select the Document Type of processed documents. • **Scan Format**. Available for certain scheduled **Scan from Disk** processes. Use the drop-down to select the scan format to be used when processing documents. By default, the processor will use the last scan format that was assigned to the scan queue being processed. **Note:** Only **Kofax** scan formats can be selected from this drop-down.

Option	Description
OCR Options	The **OCR Options** allow you to specify the configuration options for a scheduled Advanced Capture or Full-Text OCR process. **Note:** These options are only available when scheduling an Advanced Capture or Full-Page OCR process (that is, the batch's scan queue has been configured for Advanced Capture or Full-Page OCR). • **Full-Text OCR**. Select this radio button if you are scheduling a Full-Text OCR process. • **Advanced Capture**. Select this radio button if you are scheduling an Advanced Capture process. • **Process Ad Hoc OCR Documents**. Select this radio button if you would like to perform Advanced Capture or Full-Text OCR on documents in the ad hoc batch status queues (**Ad Hoc Advanced Capture** or **Awaiting Ad Hoc OCR**).

3. When you are finished configuring the Process Options, click **Apply**.

Viewing Scheduled Processes

By default, only scheduled process formats and jobs of the currently-selected process type will be displayed in the **Schedule Management** window. To view scheduled process formats and jobs of all process types, deselect the **Hide other process types** check box.

To open the **Schedule Management** window, perform one of the following actions:

- Click **Processing | Scheduler | Schedule Management**.
- Open the **Scheduled Processes** queue and double-click on a scheduled process
- Right-click on a process format in its process queue and select **Schedule Format**.

Note: Additional Product Rights are required to view a scheduled purge process. For more information, see the **System Administration** module reference guide or help file.

Modifying a Scheduled Process Format

Once a scheduled process has been created, it can be modified as needed.

To modify an existing scheduled process:

1. Open the **Schedule Management** window from the OnBase Client by clicking **Processing | Scheduler | Schedule Management**.
2. Select the process to be modified from the **Scheduled Items** box.

3. Modify the settings on the **Schedule Configuration** and **Process Options** tabs as needed.

   For more information on the options on these tabs, see Schedule Configuration on page 97 and Processing Options on page 119.

Tip: You can modify the **Schedule Configuration** settings for multiple processes at the same time. To do so, use the **Shift** or **Ctrl** keyboard keys to select multiple processes before modifying the **Schedule Configuration** settings.

4. Once you have finished modifying the scheduled process, click **Apply**.

Deleting a Scheduled Process Format

Caution: If you delete a process format or process job that is scheduled, it will be deleted from the list of scheduled jobs.

Scheduled processes can be deleted from the **Schedule Management** window.

1. Open the **Schedule Management** window from the OnBase Client by clicking **Processing | Scheduler | Schedule Management**.
2. Select the scheduled process(es) you would like to delete from the **Scheduled Items** box and click **Remove**.
3. Click **Apply**.

Running/Suspending a Scheduled Process Format

From the **Schedule Management** window, a scheduled process can be run immediately or it can be suspended.

1. Open the **Schedule Management** window from the OnBase Client by clicking **Processing | Scheduler | Schedule Management**.
2. Select one or more scheduled processes from the **Scheduled Items** box.
   - To run the process(es) now, click **Run Now**. The processes are run the next time the processing workstation is polled.
   - To suspend the process(es), click **Suspend**. To resume one or more suspended processes, select those processes and click **Resume**.

   An icon is displayed next to each scheduled process in the **Scheduled Items** box that indicates its status.

Icon	Description
	**Run Now** - Indicates that the user has clicked the **Run Now** button to cause the process to execute now instead of waiting for its scheduled time to run.

Icon	Description
	Suspend - Indicates a suspended process. The process will not run until a user selects it and clicks **Resume**.
	Active - Indicates an active scheduled process. An active process may be waiting to run or it may have already run at its scheduled time.
	Error - Indicates a process with a configuration error.

3. Click **Apply**.

Working With Process Jobs

A Process Job is one or more Process Formats that have been configured to run sequentially. A Process Job does not have to consist exclusively of a single type of Process Format; it can contain multiple Process Formats from any module that allows scheduling.

A few notes about Process Jobs:

- Process formats must be created before they can be added to a job.
- AutoFill Keyword Import Processors can be scheduled from any **Process Job Queue**.
- Process Formats created from Document Imaging sweep or scan from disk processes cannot be included in a Process Job.

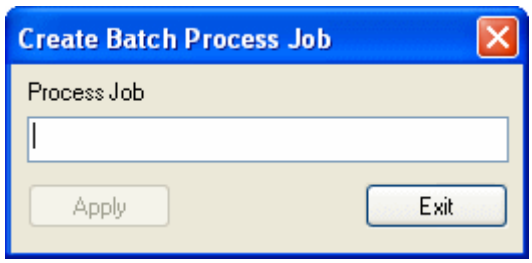
Creating a Job

You can add a job to the Scheduler from a process queue (that is, the COLD Queue, the EDI Queue, and others).

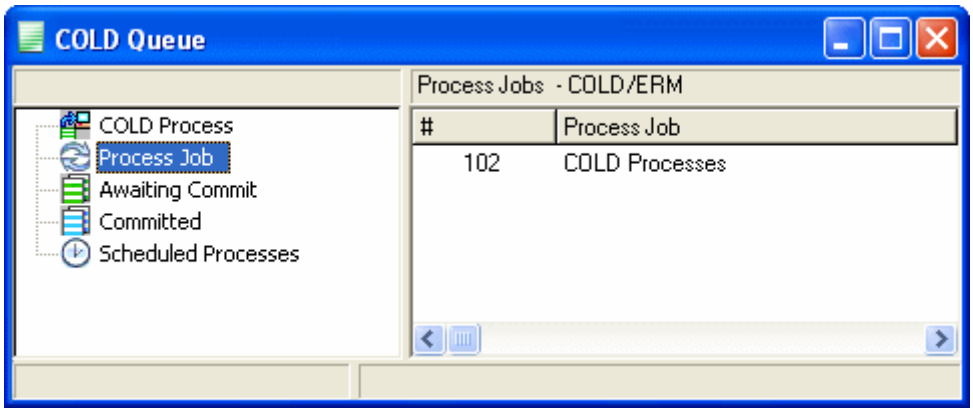
To create a job, follow these steps:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on the window and select **Create New Job**.

   Or, from the process queue, select **Process Job** and right-click in the **Process Jobs** window and select **Create New Job**. The **Create Batch Process Job** dialog box is displayed.



2. Enter a name for the job in the **Process Job** field and click **Apply**. The job is added to the process queue and is listed in the **Process Jobs** window.



Note: The process name must be 75 characters or fewer.

Note: If you are using the OnBase Client as a Windows Service, you must restart the OnBase Client after adding a new scheduled process.

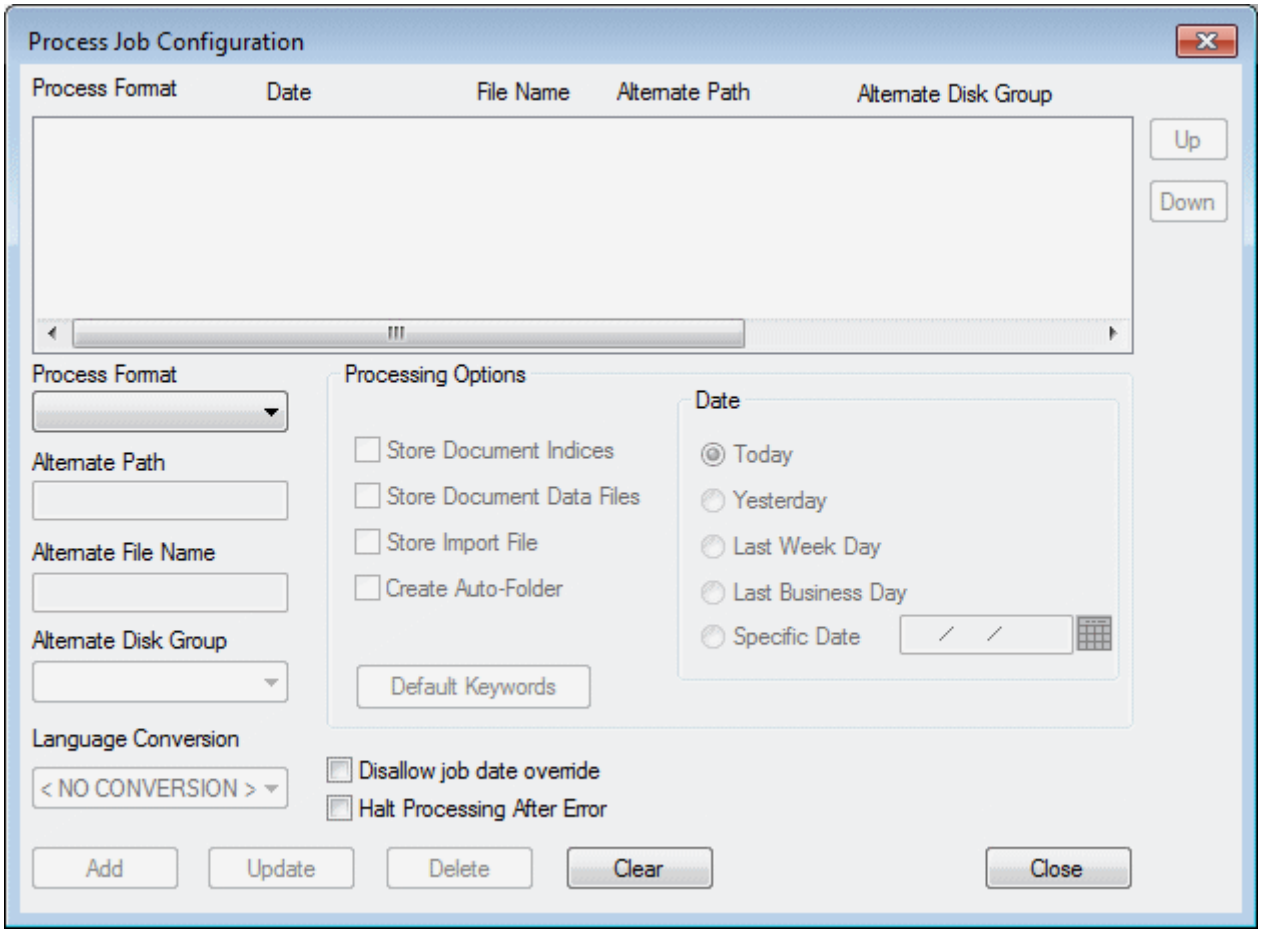
Configuring a Job

To configure a job:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Configure Job**.

   Or, select the job to be configured from the **Process Jobs** window in the process queue, right-click and select **Configure Job**.

   The **Process Job Configuration** window is displayed.



2. Configure a process format to add to the job:

Process Job Parameter	Description
Process Format	Select the process format to be incorporated in the process job. All available process formats are listed.
Alternate Path	Enter an alternate path to the data to be processed (i.e., the **Default Directory**) to use instead of the **Default Directory** configured for the selected process format. If an alternate path is not specified, the process format's **Default Directory** is used.
Alternate Filename	Enter an alternate file name for the data to be processed (i.e., the **Default File Name**) to use instead of the **Default File Name** configured for the selected process format. If an alternate file name is not specified, the process format's **Default File Name** is used.
Alternate Disk Group	Enter an alternate Disk Group to store the data being processed instead of the Disk Group configured for the selected process format. If an alternate Disk Group is not specified, the process format's default Disk Group is used.
Language Conversion	Select the language associated with the ASCII code page that created the import file. If a language conversion is not specified, the process format's **Language Conversion** setting is respected. **Note:** This setting is only used for legacy language conversions. The option **<NO CONVERSION>** should be selected when configuring process settings.
Store Document Indices	Select this option to store the processed documents in the database, along with their Keyword Values and document name. This option is enabled by default.
Store Document Data Files	Select this option to move the data file to the configured Disk Group after the process is complete. This option is enabled by default.
Store Import File	Select to store a copy of the index file used to import documents into OnBase for archive purposes. **Note:** This option is not supported for use with modules that do not support the **Store Import File** processing option. See the configuration section of the appropriate module reference guide or help file to find out whether or not the **Store Import File** processing option is supported for a module.

Process Job Parameter	Description
Create Auto Folder	Select to provide the ability to Auto-Folder documents upon processing. See the **Folders** module reference guide or help files for additional information regarding Auto-Foldering. **Note:** Not all processors offer the ability to Auto-Folder documents upon processing.
Default Keywords	Click the **Default Keywords** button to select Keyword Types and Values that are displayed in the Batch Name for that Process Job when it is processed. These Keyword Types and Values are also displayed at the top of the Verification Report for that job. **Note:** Only Keyword Types that have been configured for Document Types used in the Process Job are selectable. **Note:** If a check process format is configured as part of the job, the **Default Keywords** button is disabled when the job is selected.
Disallow job date override	Select this option to prevent users from overriding the specified job date.
Halt Processing After Error	Select this option to halt processing for the process job if the configured process format generates an error. Any other process formats configured for the process job will not be processed.
Date	These settings allow a user-defined **Document Date** to be stored for the processed documents. This date is used as the **%D** parameter that appears in the document's Auto-Name string.

3. Click **Add**.
4. Repeat Step 2 for each process format that you would like to add to the job.

   Process jobs are run in the order in which they display on the screen. Re-sequence a job by selecting it and clicking the **Up** or **Down** buttons.

Once you've added all process formats to the job, click **Close**.

Scheduling a Job

Once you have created and configured a job, you must schedule it in order for it to automatically run. A job is scheduled in almost the same way that a process format is scheduled.

To schedule a job, you must first open the **Schedule Management** window. To open it:

- From a process queue, select **Process Job** and then select the job to be scheduled in the **Process Jobs** window. Right-click and select **Schedule Job**.

- From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Schedule Job**.

Schedule Configuration

The first options that must be configured for the scheduled job are the Schedule Configuration options on the **Schedule Configuration** tab. This tab is displayed by default.

1. In the **Name** field, enter a name for the scheduled process.
2. Using the **Processing Workstation** drop-down, select the workstation that will be used to run the scheduled job.

Note: This workstation will need to be running with the **-SCHED** or **-SCHEDINST** command line switch in order to run the scheduled job.

3. Using the **Schedule Template** drop-down, select a schedule template for the process or select **<Custom Schedule>** to manually configure the schedule for this process.

Note: For information on creating a schedule template, see below.

To create a custom schedule, you will need to use the **Calendar** to select the day(s) you would like the scheduled job to run on and then you will need to specify the time the scheduled job will run using the **Default Daily Schedule** and/or **Selected Day** tabs. For more information, see those sections below.

4. Select how often you would like the scheduled job to run by selecting one of the **Processing Frequency** radio buttons.
   - **Once then Suspend**. The scheduled item will be processed once, then the scheduled process is suspended.
   - **Once per Day**. The scheduled item be processed once per day.

Note: If the scheduled item is modified, the process may be run again on the same day.

   - **Once every "" Minutes**. The scheduled item is processed in the interval (measured in minutes) entered in the field. The maximum number of minutes that can be entered is 99999.
5. When you are finished setting the Schedule Configuration options, click **Apply**.

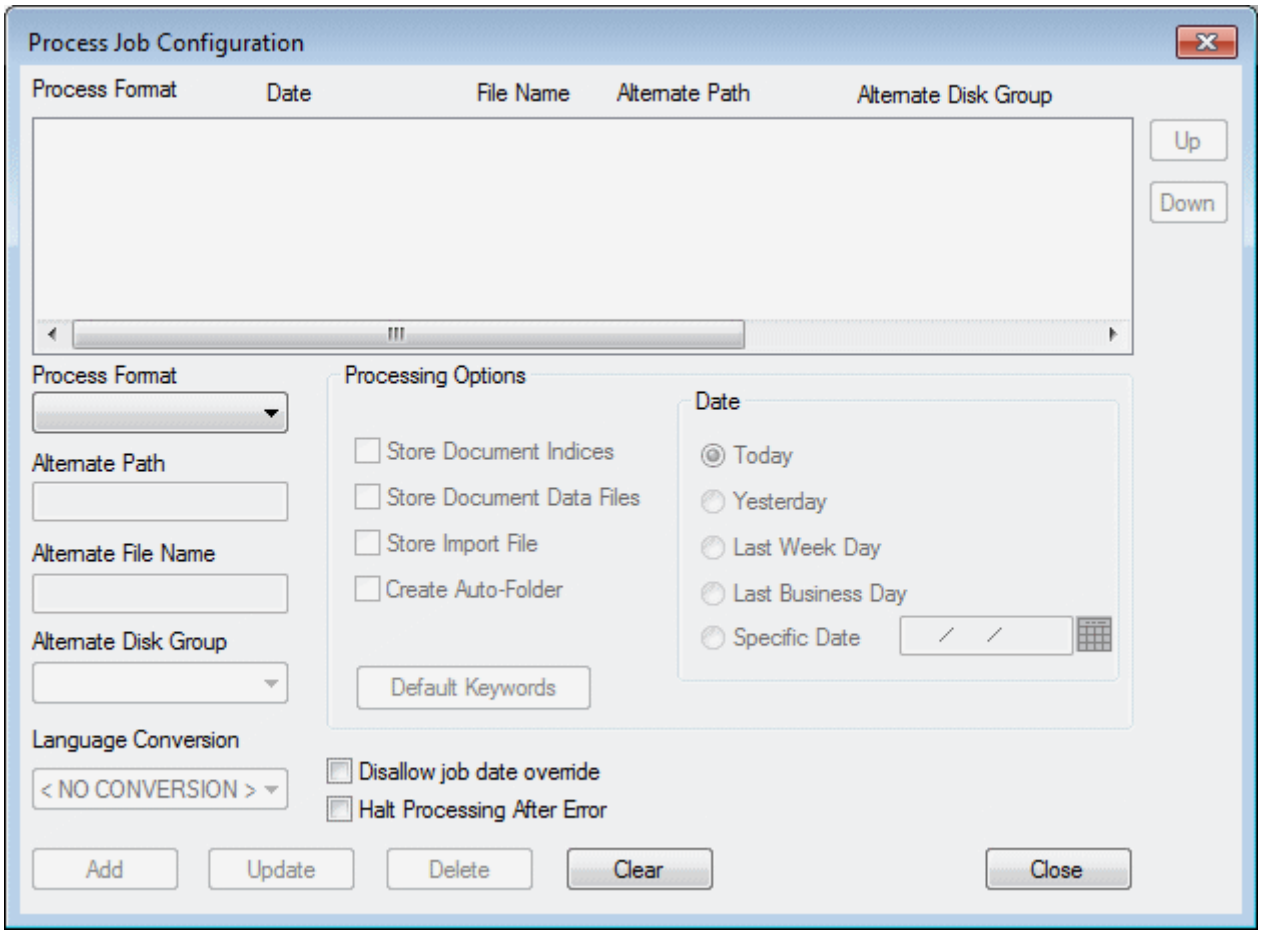
Calendar

To configure a job:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Configure Job**.

   Or, select the job to be configured from the **Process Jobs** window in the process queue, right-click and select **Configure Job**.

   The **Process Job Configuration** window is displayed.



2. Configure a process format to add to the job:

Process Job Parameter	Description
Process Format	Select the process format to be incorporated in the process job. All available process formats are listed.
Alternate Path	Enter an alternate path to the data to be processed (i.e., the **Default Directory**) to use instead of the **Default Directory** configured for the selected process format. If an alternate path is not specified, the process format's **Default Directory** is used.
Alternate Filename	Enter an alternate file name for the data to be processed (i.e., the **Default File Name**) to use instead of the **Default File Name** configured for the selected process format. If an alternate file name is not specified, the process format's **Default File Name** is used.
Alternate Disk Group	Enter an alternate Disk Group to store the data being processed instead of the Disk Group configured for the selected process format. If an alternate Disk Group is not specified, the process format's default Disk Group is used.
Language Conversion	Select the language associated with the ASCII code page that created the import file. If a language conversion is not specified, the process format's **Language Conversion** setting is respected. **Note:** This setting is only used for legacy language conversions. The option **<NO CONVERSION>** should be selected when configuring process settings.
Store Document Indices	Select this option to store the processed documents in the database, along with their Keyword Values and document name. This option is enabled by default.
Store Document Data Files	Select this option to move the data file to the configured Disk Group after the process is complete. This option is enabled by default.
Store Import File	Select to store a copy of the index file used to import documents into OnBase for archive purposes. **Note:** This option is not supported for use with modules that do not support the **Store Import File** processing option. See the configuration section of the appropriate module reference guide or help file to find out whether or not the **Store Import File** processing option is supported for a module.

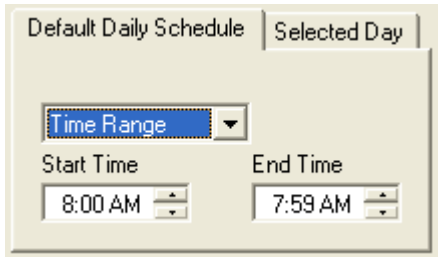
Process Job Parameter	Description
Create Auto Folder	Select to provide the ability to Auto-Folder documents upon processing. See the **Folders** module reference guide or help files for additional information regarding Auto-Foldering. **Note:** Not all processors offer the ability to Auto-Folder documents upon processing.
Default Keywords	Click the **Default Keywords** button to select Keyword Types and Values that are displayed in the Batch Name for that Process Job when it is processed. These Keyword Types and Values are also displayed at the top of the Verification Report for that job. **Note:** Only Keyword Types that have been configured for Document Types used in the Process Job are selectable. **Note:** If a check process format is configured as part of the job, the **Default Keywords** button is disabled when the job is selected.
Disallow job date override	Select this option to prevent users from overriding the specified job date.
Halt Processing After Error	Select this option to halt processing for the process job if the configured process format generates an error. Any other process formats configured for the process job will not be processed.
Date	These settings allow a user-defined **Document Date** to be stored for the processed documents. This date is used as the **%D** parameter that appears in the document's Auto-Name string.

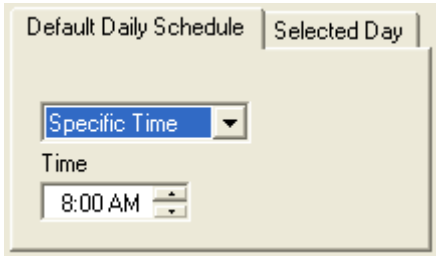
3. Click **Add**.
4. Repeat Step 2 for each process format that you would like to add to the job.
   Process jobs are run in the order in which they display on the screen. Re-sequence a job by selecting it and clicking the **Up** or **Down** buttons.

Once you've added all process formats to the job, click **Close**.

Default Daily Schedule

The **Default Daily Schedule** tab allows you to configure the processing configuration for all days that do not have a **Selected Day** tab configuration.



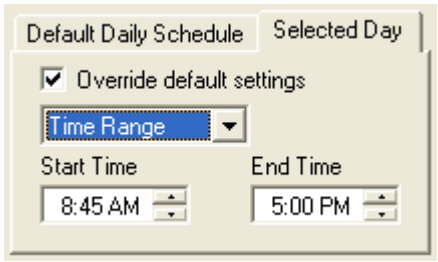


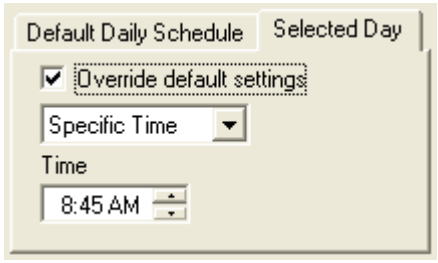
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Selected Day

The **Selected Day** tab allows you to specify settings for the selected day that differ from the settings specified in the **Default Daily Schedule** tab. In order for the **Selected Day** tab to be enabled, you must click a day to select it and you must select the **Override default settings** check box.





The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

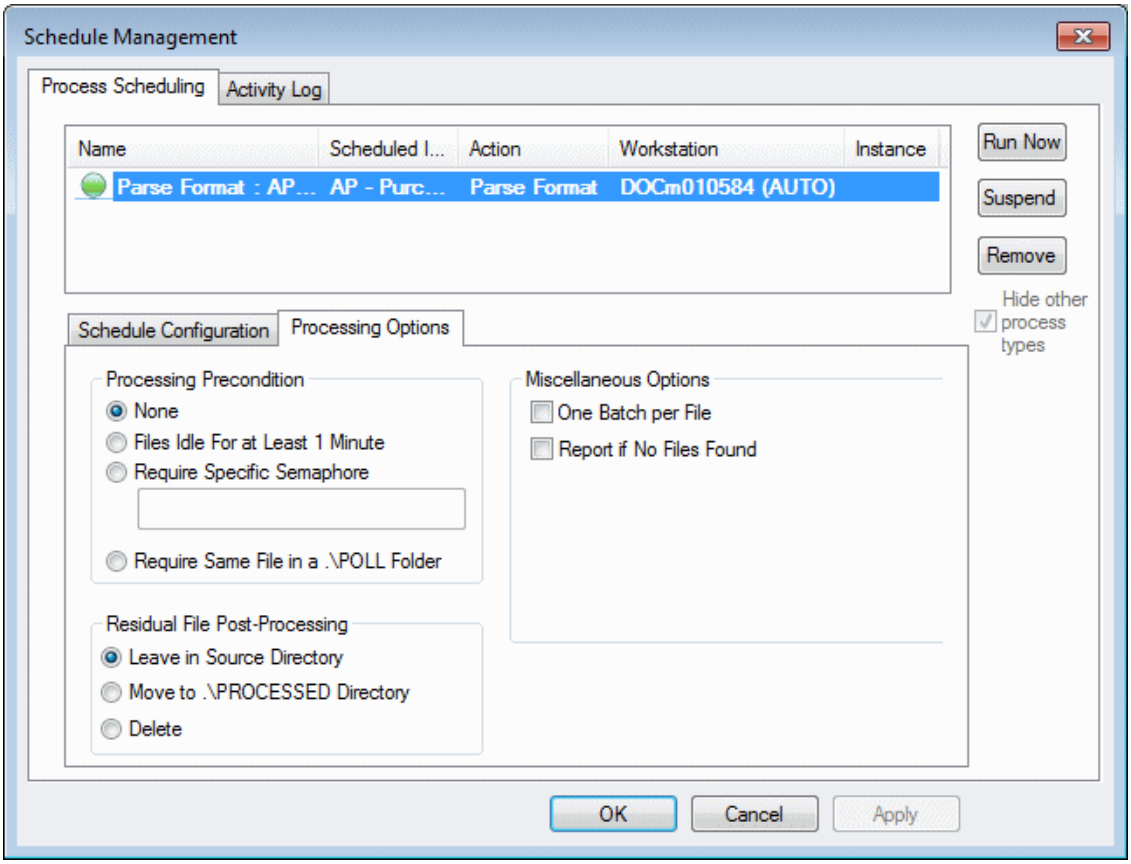
Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Processing Options

After the Schedule Options are configured on the **Schedule Configuration** tab, you must configure the Processing Options.

1. From the **Process Scheduling** tab of the **Schedule Management** window, click the **Processing Options** tab to display the Processing Options.

Note: This tab is only available if a single process is selected. If multiple processes are selected, the **Processing Options** tab is disabled.



2. Set the following Processing Options.

Option	Description
Processing Precondition	The **Processing Precondition** options allow you to specify the conditions that must be met before processing can begin. **Note:** These options are not available for scheduled PDF conversions, Advanced Capture processes, Full-Text OCR processes or scheduled commits. • **None**. If this option is selected, no processing precondition is necessary. • **Files Idle For at Least 1 Minute**. Select to indicate that processing must begin after the file indicated in the **Default File Name** of the processing format has been idle for at least one minute. • **Require Specific Semaphore**. Select to indicate that processing must begin after a trigger file is detected. The trigger file can be any file type/size/label and can be written to any location on the network. OnBase will only begin processing the processing file indicated in the **Default File Name** of the process format after the trigger file has been detected. How processing is triggered (definition of the file location and/or time variable) is defined by a semaphore. A semaphore is a technique for coordinating or synchronizing polling activity. A maximum of 255 characters can be entered in this field. The trigger file is deleted after processing. **Note:** If the trigger file is being accessed over FTP, it will not be deleted.

Option	Description
Processing Precondition (cont.)	• **Require Same File in a .\POLL Folder**. Select to indicate that processing must begin after a POLL file has been written to a specifically-configured POLL folder. The POLL file must appear in a folder labeled **POLL**, and the POLL folder must be created as a subfolder of the **Default Directory** of the process format. The name of the POLL file must be exactly identical to the name of the file to be processed. The value in the **Default File Name** field will be used to locate the POLL file. When OnBase locates the POLL file, the processor will attempt to process any file with that same name in the **Default Directory**. For example: The **Default File Name** is ***.txt**, and the **Default Directory** is **C:\ProcessFiles**. The file to be processed is stored in this directory. For this example, the file is named **pf11x74.txt**. The POLL file should be placed in **C:\ProcessFiles\POLL**, and named exactly the same as the process file (**pf11x74.txt**). OnBase will search **C:\ProcessFiles\POLL** for a file that matches the **Default File Name** of ***.txt**. Upon finding the **pf11x74.txt** file, the processor will return to the **C:\ProcessFiles** directory and search for the file named **pf11x74.txt**. This is the file that will be processed. The POLL file is deleted after processing. **Note:** This option is not supported for use with the Directory Import Processor.

Option	Description
Residual File Post-Processing	The **Residual File Post-Processing** options allow you to specify how the processor will handle files that are left in the original folder after the import process has been run. • **Leave in Source Directory**. Select to leave processed read-only files in the folder they originated in. • **Move to ..\PROCESSED Directory**. Select to move all processed files, regardless of read-only status, to the OnBase-generated **PROCESSED** folder located in the same folder the read-only files were originally in. **Caution:** Depending on your system's configuration, processed files may be automatically deleted after an import process is run. In this situation, the processed files will not be moved to the **PROCESSED** folder because they have already been deleted from the folder they originated from. This behavior can be avoided by modifying the configuration of your import processor, or by marking the files to be processed as read-only. • **Delete**. Select to delete the read-only files from the folder they originated in.
Miscellaneous Options	The **Miscellaneous Options** options allow you to specify special scheduling options. Not all options are available for all processes. • **One Batch per File**. Select to process each index file as one batch when multiple index files are being processed at once. **Note:** This option is not supported for use with the Directory Import Processor. • **Report if No Files Found**. Select to create a Verification Report if no files are found when a scheduled job is run.

3. When you are finished configuring the Process Options, click **Apply**.

Viewing a Job

All scheduled process formats and jobs can be viewed in the **Schedule Management** window.

By default, the **Hide other process types** check box is enabled, so only the selected process type's process formats or process jobs are displayed.

To open the **Schedule Management** window:

- Click **Processing | Scheduler | Schedule Management** from the OnBase Client.
- From a process queue, select **Process Job** and then select a job in the **Process Jobs** window. Double-click on the job to display the process formats that compose it.

- From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed.

Modifying a Job

To modify an existing job:

From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Configure Job**.

Or, select the job to be modified from the **Process Jobs** window in the process queue, right-click and select **Configure Job**.

The **Process Job Configuration** dialog box is displayed.

Note: If you are using the OnBase Client as a Windows Service, you must restart the OnBase Client after modifying a scheduled process.

Note: For more information on configuring a process job, see Configuring a Job on page 110 and Scheduling a Job on page 112.

Renaming a Job

To rename an existing job:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Rename Job**.

   Or, select the job to be modified from the **Process Jobs** window in the process queue, right-click and select **Rename Job**.

   The **Rename Process Job** dialog box is displayed.
2. Enter the new name for the job and click **OK**.

Deleting a Job

Caution: If you delete a process format or process job that is scheduled, it will be deleted from the list of scheduled jobs.

To delete an existing job:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Delete Job**.

   Or, select the job to be modified from the **Process Jobs** window in the process queue, right-click and select **Delete Job**.

   A confirmation message is displayed.
2. Click **OK**. The job is deleted.

Running/Suspending a Job

From the **Schedule Management** window, a job can be run immediately or it can be suspended.

1. Open the **Schedule Management** window from the OnBase Client by clicking **Processing | Scheduler | Schedule Management**.
2. Select one or more jobs from the **Scheduled Items** box.
   - To run the jobs now, click **Run Now**. The selected jobs are run the next time the processing workstation is polled.
   - To suspend the jobs, click **Suspend**. To resume suspended jobs, click **Resume**.

   An icon is displayed next to each scheduled job in the **Scheduled Items** box that indicates its status.

Icon	Description
	**Run Now** - Indicates that the user has clicked the **Run Now** button to cause the job to execute now instead of waiting for its scheduled time to run.
	**Suspend** - Indicates a suspended job. The job will not run until a user selects it and clicks **Resume**.
	**Active** - Indicates an active scheduled job. An active job may be waiting to run or it may have already run at its scheduled time.
	**Error** - Indicates a job with a configuration error.

3. Click **Apply**.

A job can also be run immediately from the process format queue or the **Process Jobs** window.

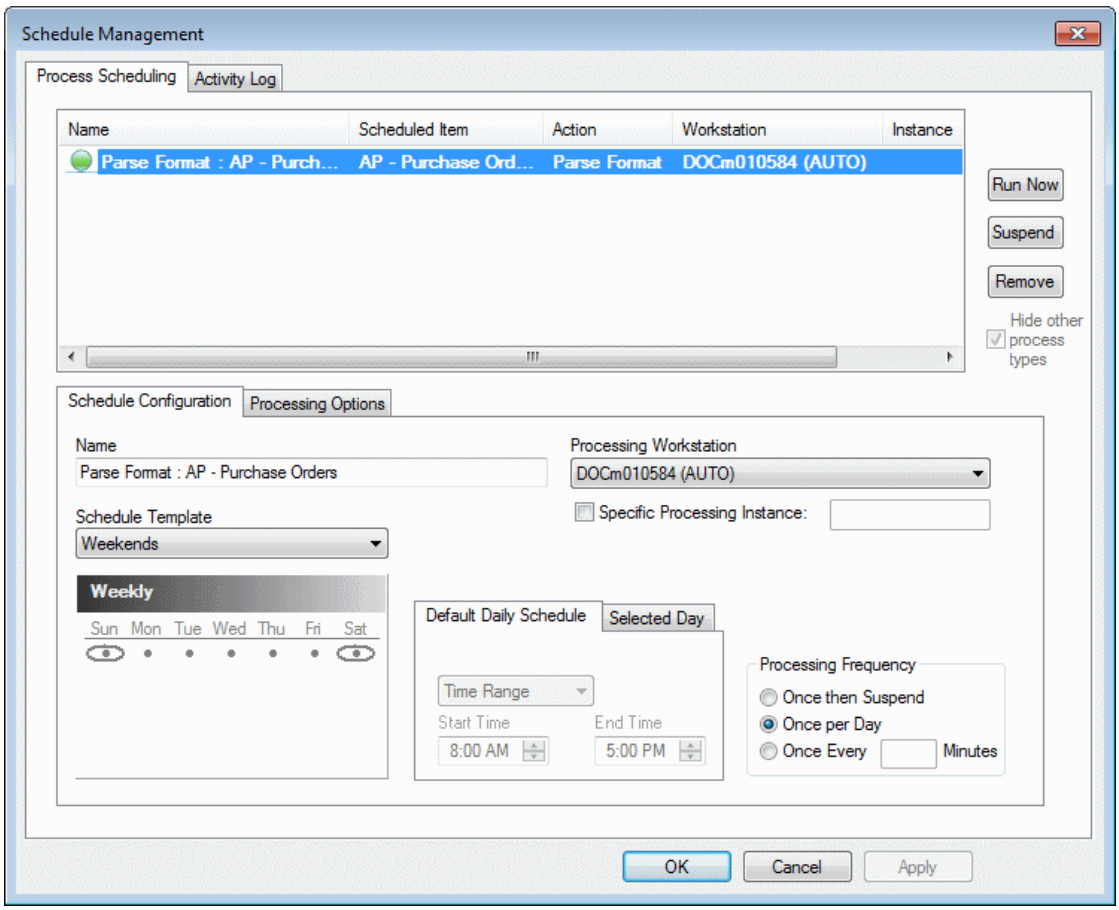
From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Process Job**.

Or, from a process queue, select **Process Job** and then select the job to be run in the **Process Jobs** window. Right-click in the **Process Jobs** window and select **Process Job**.

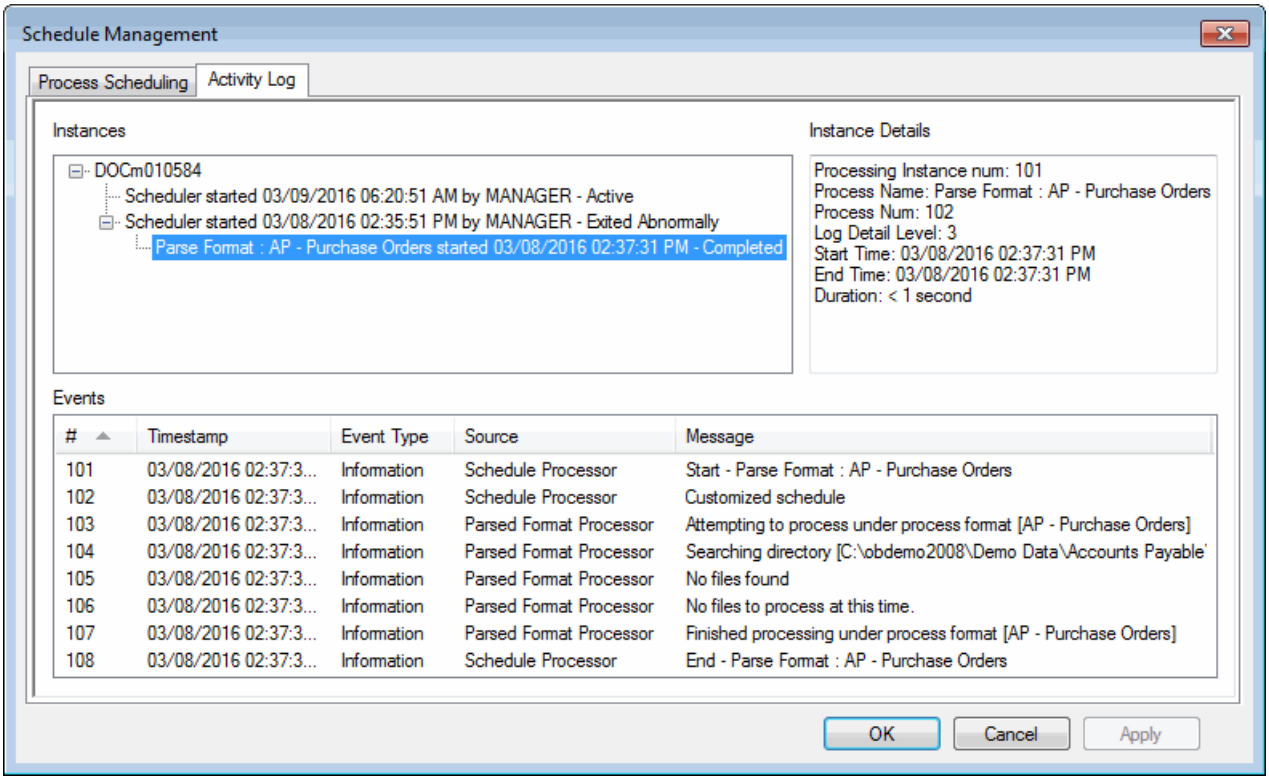
Viewing the Activity Log

The Activity Log provides visibility and control over the logging information generated during the execution of scheduled processes. To view the Activity Log, follow these steps:

1. From the OnBase Client, click **Processing | Scheduler | Schedule Management**. The **Schedule Management** dialog box is displayed.



2. Click the **Activity Log** tab. The **Activity Log** is displayed.



Note: The **Activity Log** tab is only available if logging is enabled and at least one log entry exists.

3. Select a log entry to view more information about that processing instance. Details on the selected instance are displayed in the Instance Details section in the upper right corner of the dialog box, and details on each event within that instance are displayed in the Events section in the bottom of the screen.

Note: Depending on your assigned product rights, you may be able to delete unneeded entries from the Activity Log. See the User Group Configuration for Product Rights section of the **System Administration** documentation for information on product rights.

Creating Schedule Templates

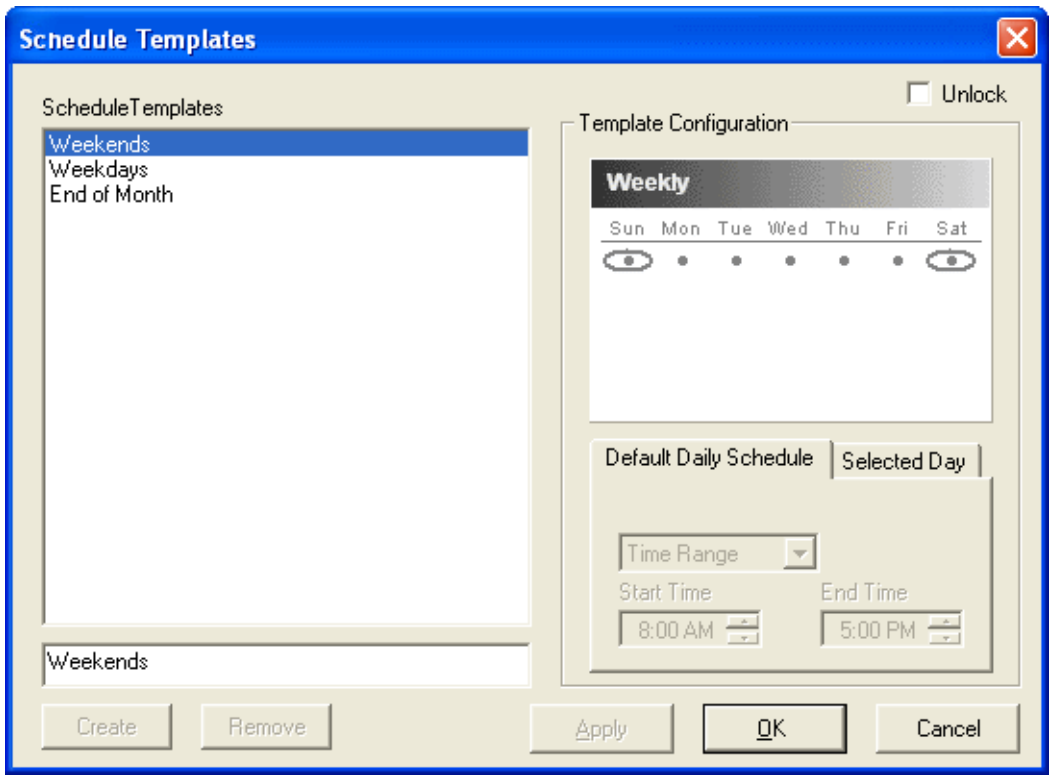
Creating Schedule Templates

A schedule template is used to create a processing schedule. These schedules can be used by multiple scheduled processes without having to be re-configured each time they are used.

Note: Any user with the Client and Client Scheduler product rights can create a schedule template. Once created, a schedule template is available to all users with Client and Client Scheduler product rights.

To create a schedule template:

1. From the OnBase Client, click **Processing** | **Scheduler** | **Schedule Templates**. The **Schedule Templates** window is displayed.



2. Enter a name for the new template and click **Create**.

Note: The maximum number of characters that can be used for a name is 80.

3. Configure the appropriate options. See the sub-sections below for more information on using the calendar, **Default Daily Schedule**, and **Selected Day** options under the **Template Configuration** area.
4. Once all Template Configuration options have been set, click **OK**.

To edit an existing template, select it from **Schedule Templates** list and select the **Unlock** check box. Once you have finished modifying it, click **OK**.

Calendar

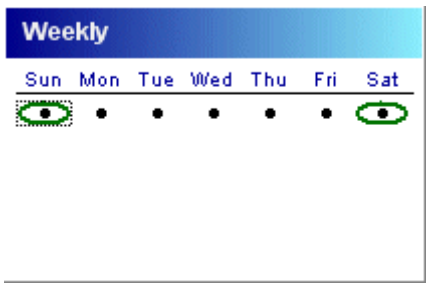
The calendar is used to select the day(s) on which a scheduled process should be run.

Note: The calendar is displayed based on your Workstation Regional Settings and the OnBase language DLL that you are using.

To change the view of the calendar, click the calendar heading (in the example above, **Weekly**) to display a menu. Select one of the following options to display a different calendar for configuration:

- **Weekly**. Allows you to configure a process to run on a certain day of the week (i.e., Thursday).
- **Monthly**. Allows you to configure a process to run monthly, on a particular date (i.e., the 1st and 15th of the month).
- **Monthly** (Day-Relative). Allows you to configure a process to run on a relative day of the month (i.e., the first Saturday of the month, the 2nd Wednesday of the month).
- **Annual**. Allows you to configure a process to run on a certain day of the year (i.e., June 30).
- **Full Calendar**. Allows you to configure a process to run on specified days of specified years (e.g., August 10, 2011 and/or July 17, 2012).

To select days that you would like to run a scheduled process, double-click the day on the calendar. The selected day is circled.

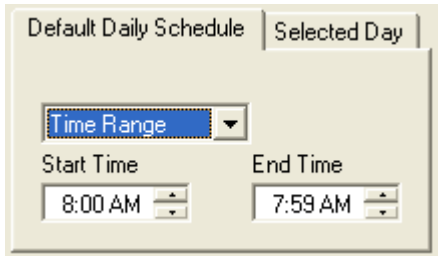


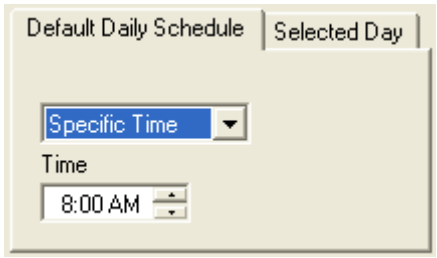
Note: In the example above, two days are selected but **Sunday** is the currently-selected day.

To deselect a day, double-click it.

Default Daily Schedule

The **Default Daily Schedule** tab allows you to configure the processing configuration for all days that do not have a **Selected Day** tab configuration.



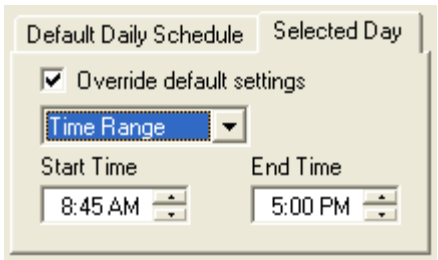


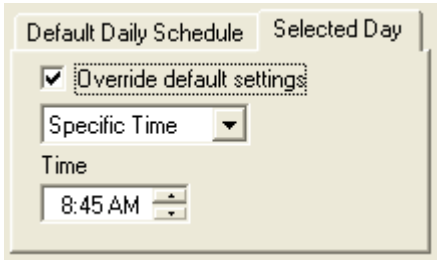
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Selected Day

The **Selected Day** tab allows you to specify settings for the selected day that differ from the settings specified in the **Default Daily Schedule** tab. In order for the **Selected Day** tab to be enabled, you must click a day to select it and you must select the **Override default settings** check box.



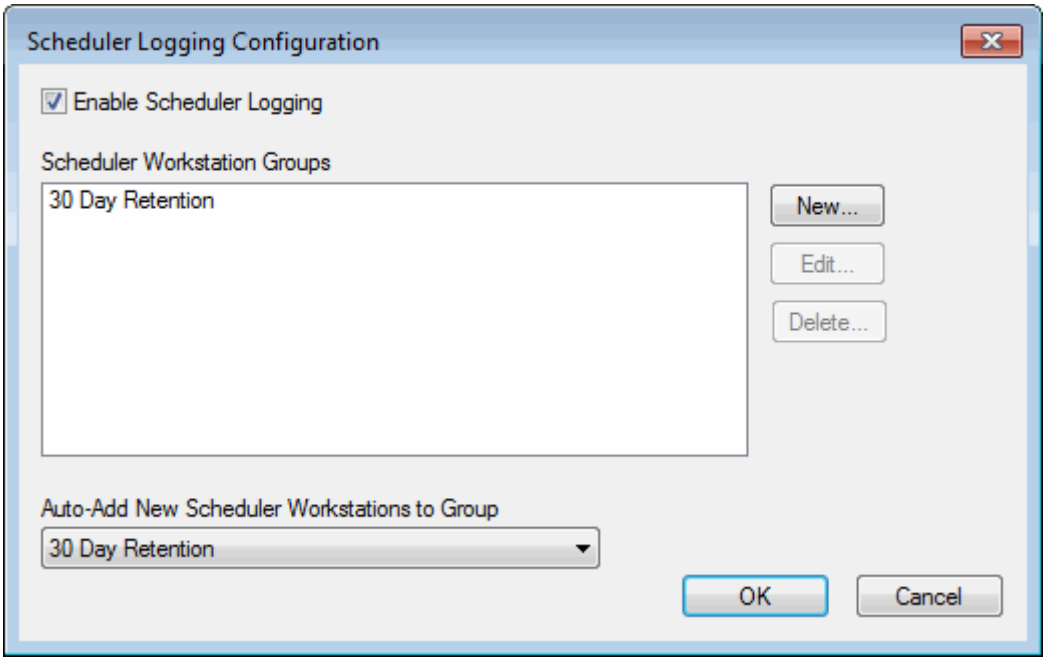


The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Configuring Schedule Logging

Schedule logging is controlled at the workstation group level. Each workstation used to perform scheduled processing can only be a member of a single workstation group, and the settings defined for a workstation group are applied to all workstations within that group. Scheduler logging is configured from the **Scheduler Logging Configuration** dialog box, available from the OnBase Client under **Processing | Scheduler | Logging Configuration**.



Note: This dialog box is only available for selection if your user account has been assigned the required product right. See the User Group Configuration for Product Rights section of the **System Administration** documentation for information on product rights.

Select the **Enable Scheduler Logging** option to perform scheduler logging for all scheduler workstation group that have enabled the **Enable Logging for Group** option. If this option is not selected, no scheduler logging is performed for any scheduler workstation group.

By default, there is a single group named **30 Day Retention**. Other groups can be created as needed, depending on the logging requirements of different types of processing workstations. See the following topics for more information on creating, editing, and deleting scheduler workstation groups:

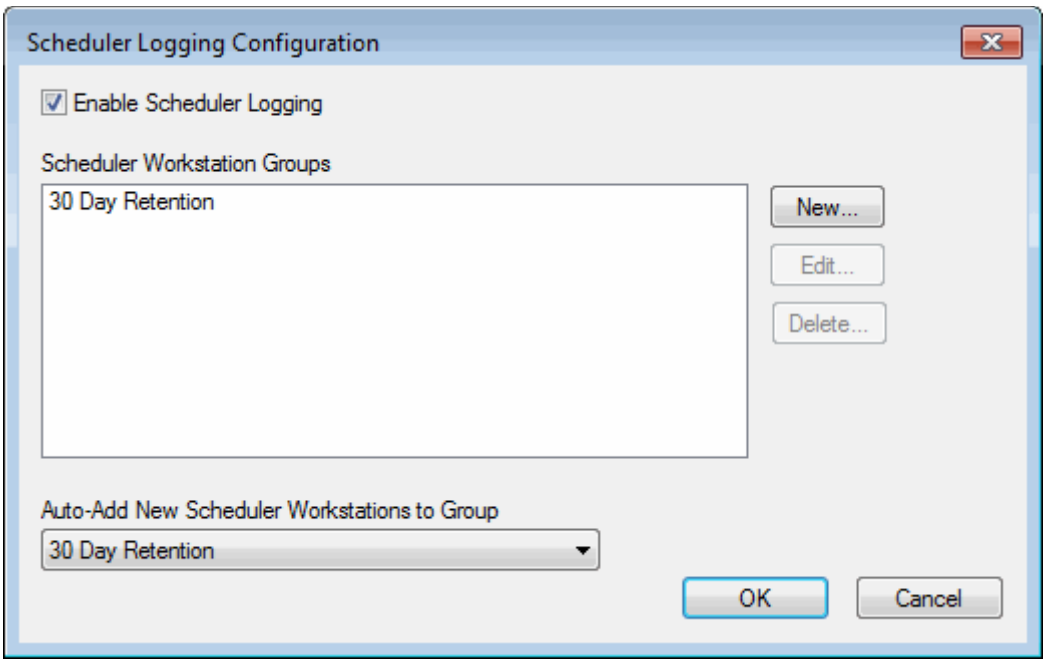
- See Creating a Scheduler Workstation Group on page 132 for more information on creating a new scheduler workstation group.
- See Editing a Scheduler Workstation Group on page 135 for more information on editing a scheduler workstation group.
- See Deleting a Scheduler Workstation Group on page 138 for more information on deleting a scheduler workstation group.

The **Auto-Add New Scheduler Workstations to Group** setting controls whether or not new scheduler workstations will automatically add themselves to a scheduler workstation group. Select a scheduler workstation group from the drop-down list to automatically add new processing workstation to that group, or select <none> to disable automatic addition. By default, this is set to the **30 Day Retention** group.

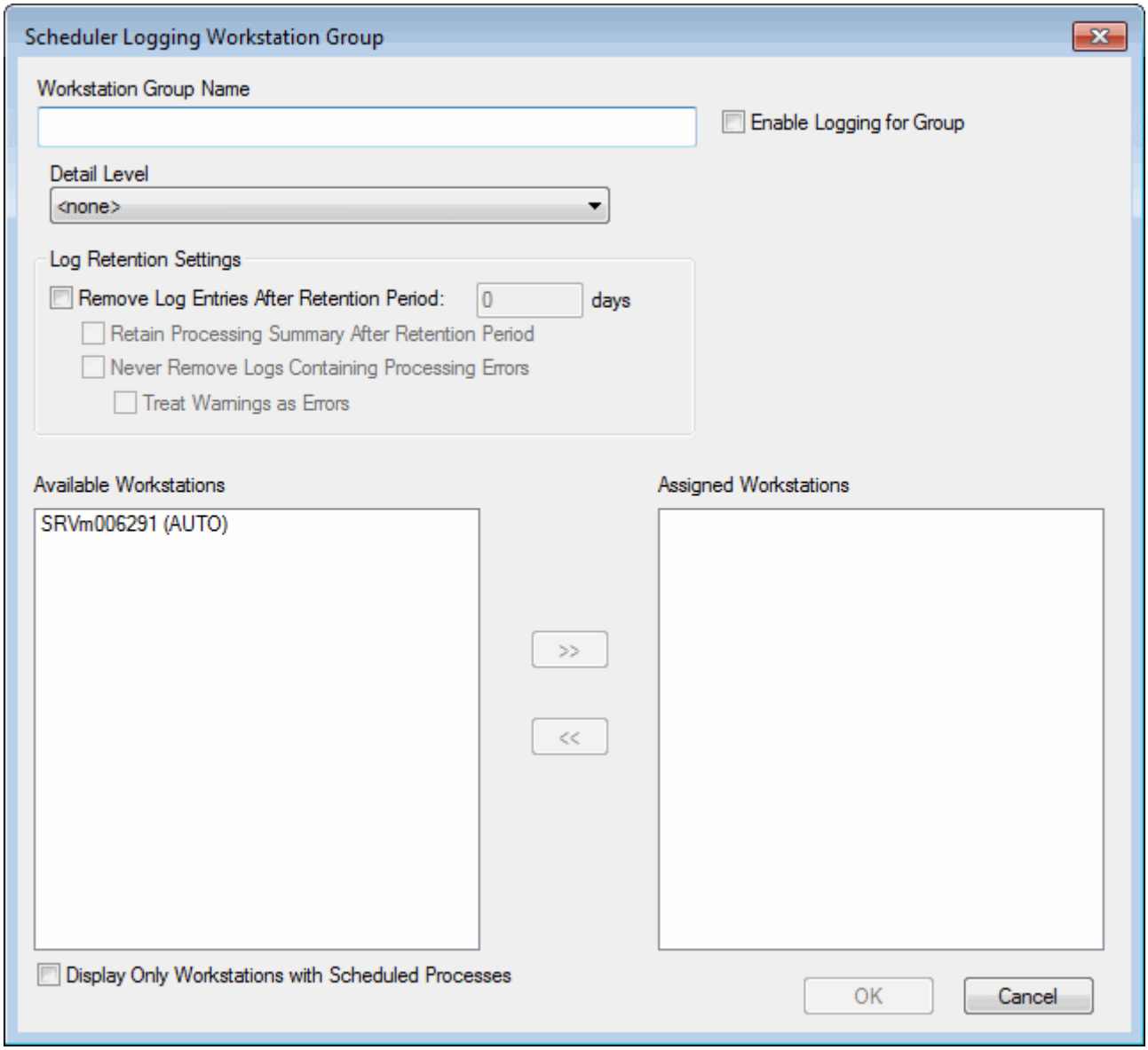
Creating a Scheduler Workstation Group

Scheduler workstation groups control how schedule logging is performed by the assigned workstations. To create a new scheduler workstation group, follow these steps:

1. From the OnBase Client, click **Processing | Scheduler | Logging Configuration**. The **Scheduler Logging Configuration** dialog box is displayed.



2. Click **New**. The **Scheduler Logging Workstation Group** dialog box is displayed.



3. Type a name for the scheduler workstation group in the **Workstation Group Name** field.
4. Select the **Enable Logging for Group** option so that logging is performed for workstations in the group. If this option is not selected, logging is not performed for this scheduler workstation group.
5. Select the desired amount of data to be logged from the **Detail Level** drop-down list. The higher levels of detail are most useful for new processes or processes that are experiencing issues.

6. If desired, you can configure a retention period for log entries. The following options are available:

Option	Description
Remove Log Entries After Retention Period: _ days	Select this option and enter a number in the available field to remove log entries from the scheduler log after the specified number of days.
Retain Processing Summary After Retention Period	Select this option to retain the processing instance record after the retention period has passed and all of the record's log entries have been removed.
Never Remove Logs Containing Processing Errors	Select this option to prevent the retention period from being applied to any processing logs that reported an error. This can provide an administrator more time to analyze any recorded issues.
Treat Warnings as Errors	Select this option to treat warnings as errors for the purpose of log retention. When this option is selected, the retention period is not applied to any processing logs that reported a warning. **Note:** This option is only available if the **Never Remove Logs Containing Processing Errors** option is selected.

7. Select all workstations you want to assign to this scheduler workstation group from the **Available Workstations** list, then click the **>>** button. The selected workstations are added to the **Assigned Workstations** list.

   Because workstations can only be assigned to a single scheduler workstation group, the list of workstations in the **Available Workstations** list does not include any workstations that are already assigned to another scheduler workstation group.

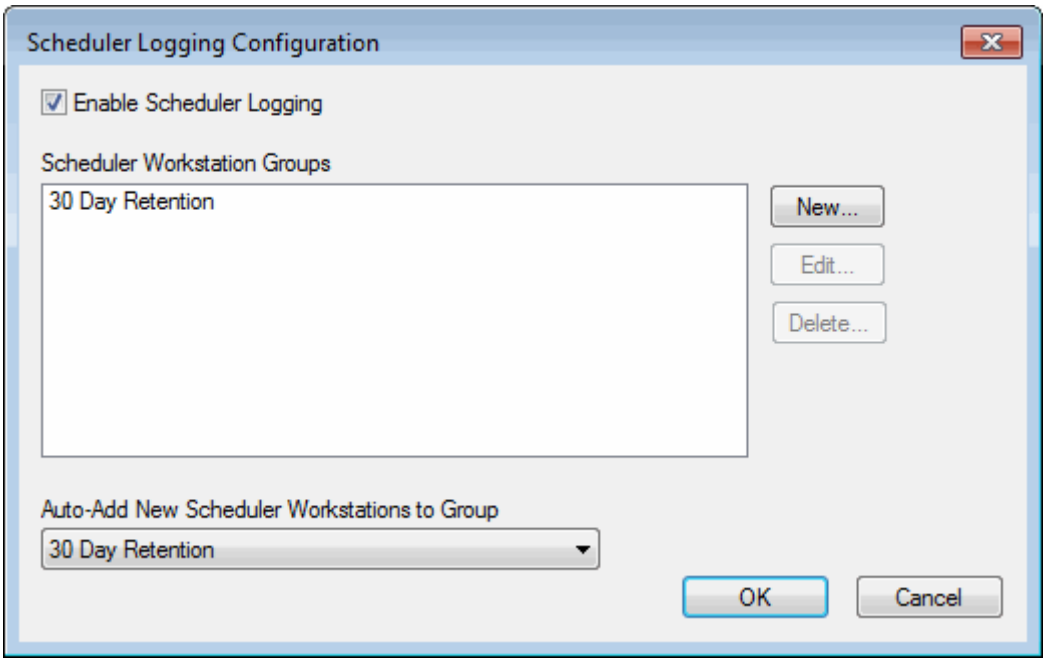
Tip: You can select the **Display Only Workstations with Scheduled Processes** option to limit the list of **Available Workstations** to those workstations that have scheduled processes assigned to them.

8. Click **OK**.

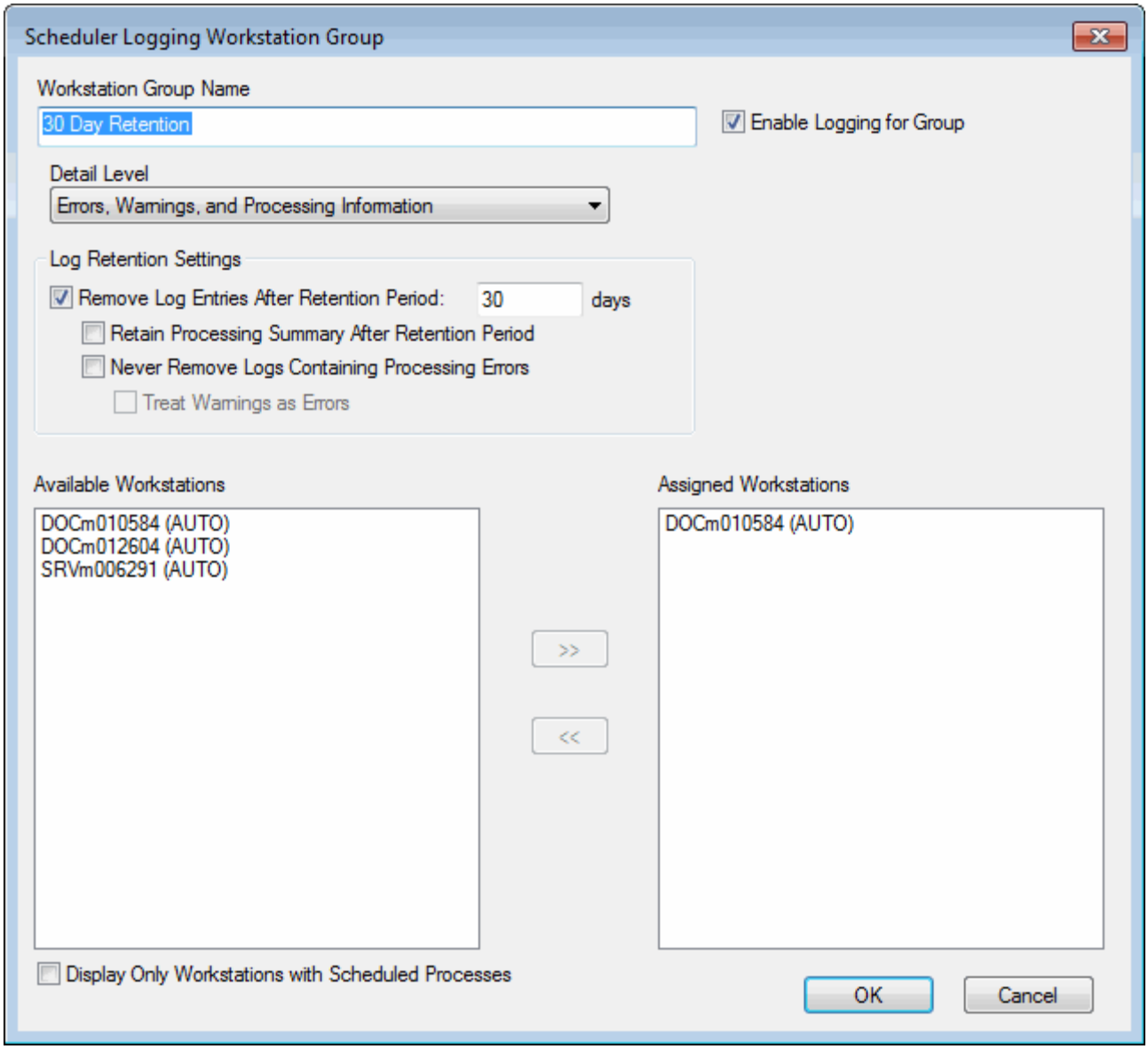
Editing a Scheduler Workstation Group

Scheduler workstation groups control how logging is performed by the assigned workstations. To edit an existing scheduler workstation group, follow these steps:

1. From the OnBase Client, click **Processing | Scheduler | Logging Configuration**. The **Scheduler Logging Configuration** dialog box is displayed.



2. Select a scheduler workstation group and click **Edit**, or double-click on a scheduler workstation group. The **Scheduler Logging Workstation Group** dialog box is displayed.



3. Modify the scheduler workstation group's settings as desired. The following settings are available:

Option	Description
Workstation Group Name	The name of the scheduler workstation group.
Enable Logging for Group	The **Enable Logging for Group** option controls whether or not logging is performed for workstations in the group. Logging is only performed if this option is selected.
Detail Level	The **Detail Level** drop-down list controls the amount of data that is logged. Higher levels of detail are most useful for new processes or processes that are experiencing issues.
Remove Log Entries After Retention Period: _ days	When this option is selected, log entries are removed from the scheduler log after the specified number of days.
Retain Processing Summary After Retention Period	When this option is selected, the processing instance record is retained after the retention period has passed and all of the record's log entries have been removed.
Never Remove Logs Containing Processing Errors	When this option is selected, the retention period is not applied to any processing logs that have reported an error. This can provide an administrator more time to analyze any recorded issues.
Treat Warnings as Errors	When this option is selected, warnings are treated as errors for the purpose of log retention. The retention period is not applied to any processing logs that have reported a warning. **Note:** This option is only available if the **Never Remove Logs Containing Processing Errors** option is selected.
Available Workstations/ Assigned Workstations	The **Available Workstations** list contains all workstations that are available to be assigned to this scheduler workstation group. Because workstations can only be assigned to a single scheduler workstation group, the list of workstations in the **Available Workstations** list does not include any workstations that are already assigned to another scheduler workstation group. The **Assigned Workstations** list contains all workstations that have been assigned to this scheduler workstation group.

Option	Description
Display Only Workstations with Scheduled Processes	When this option is selected, the list of **Available Workstations** is limited to those workstations that have scheduled processes assigned to them.

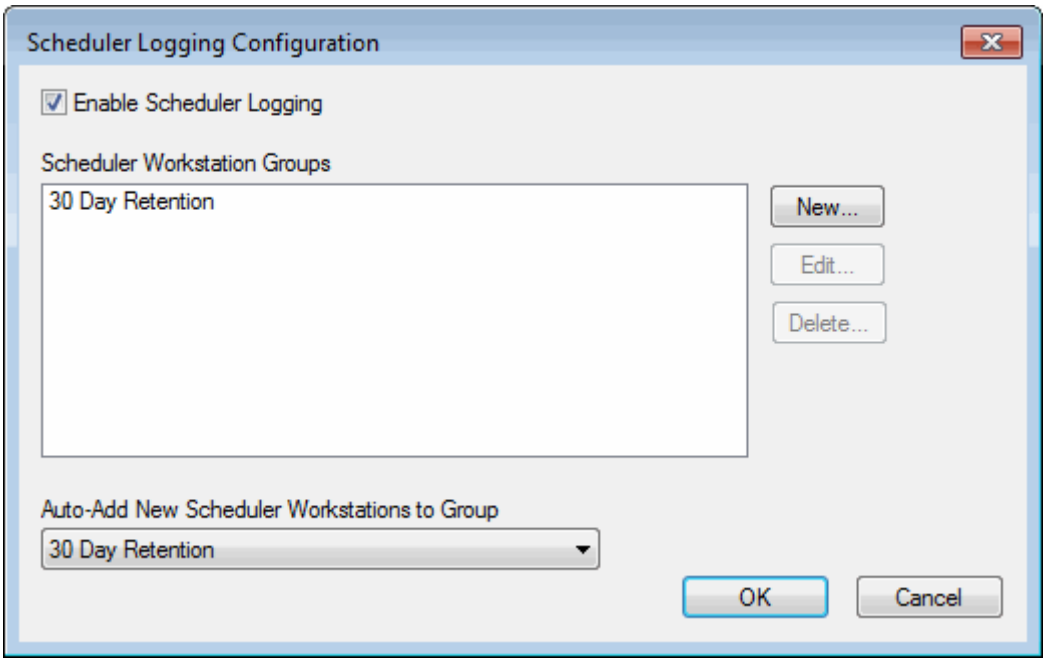
Note: After making a change to any of the options under **Log Retention Settings**, previously retained logs are rechecked to verify that they conform with the new settings. Logs which do not will be removed. For example, if you had previously configured the scheduler workstation group to **Retain Processing Summary After Retention Period** and then deselect that option, existing processing summaries older than the retention period will be removed.

4. Click **OK**.

Deleting a Scheduler Workstation Group

Scheduler workstation groups control how logging is performed by the assigned workstations. To delete a scheduler workstation group, follow these steps:

1. From the OnBase Client, click **Processing | Scheduler | Logging Configuration**. The **Scheduler Logging Configuration** dialog box is displayed.



2. Select a scheduler workstation group and click **Delete**. A confirmation dialog box is displayed.
3. Click **Yes**. The selected scheduler workstation group is deleted, and any workstations that were assigned to that group are available to be added to another scheduler workstation group.

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.

Usage

Using a Dedicated Processing Workstation

It is considered a best practice to use a dedicated processing workstation or server to run your EDI 835 processes. No processes, EDI 835 or otherwise, should ever be run from your OnBase database server.

In addition, all EDI 835 processes should be run on a local installation of OnBase on the local processing workstation, not an installation of OnBase accessed via a UNC path.

Running OnBase as a Service

It is considered a best practice to run OnBase as a service when performing scheduled EDI 835 processes instead of only running an instance of the OnBase Client with the **-SCHED** command line switch.

System Administration & Maintenance

Committing Batches

It is considered a best practice to regularly commit batches. Uncommitted batches are stored only in the first mass storage copy of the Disk Group; if this disk was to fail, these batches would be lost.

When batches are committed, documents in the batches are copied to the secondary and tertiary copies of the Disk Group. If one of these Disk Groups was to fail, the data could be recovered from another copy of the Disk Group.

Purge Incomplete Process and Incomplete Commit Queues

It is considered a best practice to purge batches residing in the **Incomplete Process** and **Incomplete Commit** queues and re-process these batches to prevent batches containing errors from residing in your OnBase solution.

Run Configuration Reports

It is considered a best practice to run Configuration Reports after any new OnBase configuration elements (e.g., Disk Groups, Document Type Groups, Document Types or Keyword Types) are added to an EDI 835 process format.

Configuration Reports detail the exact setup of these elements of OnBase, improving your ability to troubleshoot your solution and communicate with Technical Support. Additionally, these reports are stored in OnBase, providing you with a historical record of your OnBase solution's design.

Periodically Check to Ensure Processes are Accurate

It is considered a best practice to periodically check documents that have been processed by EDI 835 to make sure the process formats are accurate and to ensure that there are no issues preventing new documents from being processed correctly. Examine the processed documents to ensure all pages are present and to review their Keyword Values.

View Verification Reports

It is considered a best practice to review the Verification Report after a process is run to ensure that it finished without any errors being reported. If there are multiple processes running on a daily basis, it may be beneficial to configure the process to use the **Accumulate Processing Information** option. This combines all Verification Reports configured to use this option into a single daily report, allowing administrators to view one report in a single location to check all processed batches for the day.

Review SYS-Unidentified Items Document Type

It is considered a best practice to review the **SYS-Unidentified Items** Document Types periodically to ensure that your EDI 835 processes are correctly configured.

Ideally, there should not be any items present; however, occasionally an unidentified item may be processed. It is possible that the unidentified document may have been created by an extra form feed or an extraneous character, but it is also possible the unidentified items may be vital documents.

If the unidentified item is an actual document, the process must be corrected. It is vital to determine the cause of any errors and correct it.

Ensure Temporary Disk Space is Sufficient

When EDI import files are processed, they are copied to a temporary storage location.

If there is insufficient space, a process will be unable to complete. Using Windows Explorer or another file management utility, check to make sure enough space is available. It is considered a best practice to keep at least enough space for the largest file to be processed.

Monitor Disk Group Space and Database Size

It is considered a best practice to monitor both the amount of free space available in your Disk Groups and the size of your OnBase database.

As more documents are added to your OnBase solution, the available space in your Disk Groups is decreased and the size of your OnBase database is increased. It is important to monitor the Disk Groups to ensure that the mass storage copy has enough space to maintain the required volumes. It is important to ensure that the growth of the OnBase database is monitored so it can be managed as needed.

Maintain Processing Queues

It is considered a best practice to perform the following maintenance activities on your EDI 835 processing queues:

- Delete any processes that are no longer being used.
- Delete any jobs that are not used.
- Purge items from the **Incomplete Process** and **Incomplete Commit** queues.
- Regularly commit batches.

Maintain Backup Locations

If the EDI 835 process format is configured to backup the data prior to running the EDI 835 process, or if a manual process is performed to copy data before running the EDI 835 process, it is considered a best practice to verify that the backup storage area is monitored and regularly purged and has plenty of disk space.

Configuration

The following best practices should be considered when configuring an EDI 835 process format:

XML Style Sheet Configuration

It is recommended that the following line be placed below the XML declaration in the style sheet to ensure proper viewing:

```
<!DOCTYPE xsl:stylesheet [ <!ENTITY nbsp " "> ]>
```

An example of an XML declaration is:

```
<?xml version="1.0" encoding="UTF-8" ?>
```

Settings

The following best practices refer to the settings displayed on the **Process Settings For: <Process Format Name>** dialog box:

Processing Tab

Download and Process Section

- For performance reasons, it is considered a best practice to limit the number of import files processed per EDI 835 process; if possible, it is recommended that one import file be processed per EDI 835 process, even if the import file is quite large.

  Limiting the number of files processed per EDI 835 process increases the performance of your solution due to the reduced disk I/O required to access fewer files.
- If possible, it is considered a best practice to identify the import file to be processed by its exact file name in the **Default File Name** field to ensure the EDI 835 processor does not attempt to process any files in the Default Directory that are not EDI 835 import files.

Download Protocol Section

For performance or character length reasons, it is recommended that you replace the server name with its IP address. Try some benchmarks, and if name resolution causes a performance degradation, then make the corresponding change in the Configuration module, under **Disk Groups** | **Volume Information**.

Preprocess Options Section

- If you are going to be using a preprocessor with an EDI 835 process format, it is considered a best practice to run the preprocessor over your sample import file prior to configuring the EDI 835 process format.
- It is considered a best practice to always select the **Backup Path** check box to backup your import file prior to processing.

Options Tab

Add Documents to Workflow Option

- When using the Core-based OnBase Client interface, it is recommended that you always select **On Commit**.
- When using the Core-based OnBase Client interface, it is required that you select **On Commit** if your Workflow is configured to perform any System Work.

Field Order

The following best practice refers to the settings displayed on the **Field Configuration** dialog box:

Mapping OnBase Keyword Types to EDI Field Names

It is recommended that you name your OnBase Keyword Types to easily associate them with the standard EDI Field Names. For example, if a Field Name is **Claim Number**, name the Keyword Type **EDI Claim Number**.

Testing a New EDI 835 Process Format

After configuring a EDI 835 process format, you should manually run the process with the **Test Only** check box selected to ensure the process format was configured correctly and that no errors were identified. This will ensure that no incorrectly-configured documents are accidentally imported into your OnBase solution.

Installation

Licensing

- It is considered a best practice to register a processing workstation as a Named Client rather than a Concurrent Client. This ensures that the processing workstation always has access to the processing module; a workstation registered as a Concurrent Client cannot access the processing module if another workstation is currently registered for it.
- It is considered a best practice to migrate any existing **EDI 835 EOB Processor** licenses to **EDI 835 EOB Processor (HIPAA 5010)** licenses. For more information, contact your solution provider.

OnBase®
Foundation EP5

EDI 835 EOB Processor

User Guide

Foundation EP5

EDI 835 processes, like other import processes, are performed in the OnBase Client.

Getting Started

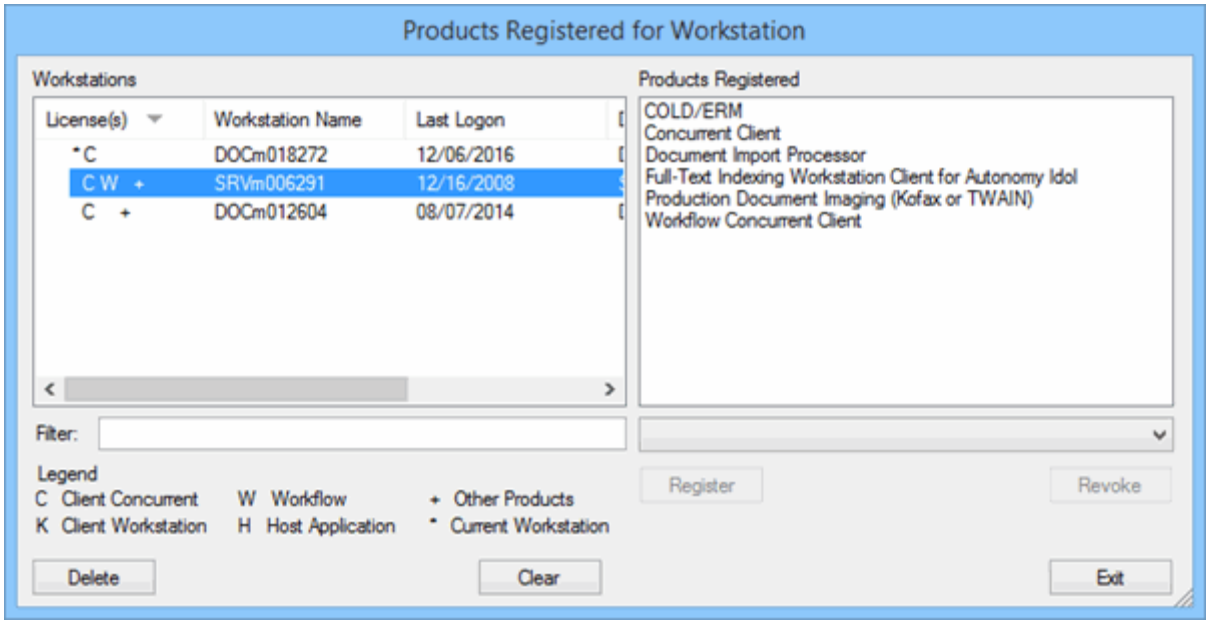
The first step when running an EDI 835 process is to log onto the OnBase Client as a member of a User Group that can perform EDI 835 processing and register the processing workstation for EDI 835.

Registering a Workstation

Tip: It is considered a best practice to register a processing workstation as a Named Client rather than a Concurrent Client. This ensures that the processing workstation always has access to the processing module. A workstation registered as a Concurrent Client cannot access the processing module if another workstation is currently registered for it.

To register a workstation to use licensed products:

1. In the OnBase Client, select **Workstation Registration** from the **Admin** | **User Management** menu. The **Products Registered for Workstation** dialog box is displayed.



The left pane of the dialog box displays a list of the workstations that have, at any time, been logged in to OnBase. The columns in the left pane contain the following information:

- **License(s):** Displays the symbols of the products registered for that workstation. The legend for the symbols is located below the list of workstations.
- **Registered:** Displays the name of each workstation that has ever been logged in to OnBase.
- **Last Logon:** Displays the date that the workstation was last logged on.
- **Description:** Displays a short description of the individual workstation.

2. Select the workstation to register products for in the left **Workstations** pane. The current workstation is shown at the top of the list and is marked with an asterisk (*****).

Tip: To filter the workstations displayed in the left **Workstations** pane, type the first few letters of the **Workstation Name** in the **Filter** field. The list is filtered to show only those workstations with a name that begins with the letters typed.

3. Select the license to register from the **Products Registered** drop-down list.

   If you are properly licensed for a product and it is not available from the drop-down list, it may be registered on another workstation.

   To view the products registered for other workstations and revoke those licenses:

   a. In the left pane, select the workstation to view the products registered for. A workstation with a **+** in the **License(s)** column is registered for one or more products.

      The right **Products Registered** pane displays all products registered for the selected workstation.

   b. Select the product registration to revoke in the right **Products Registered** pane.

   c. Click **Revoke**.

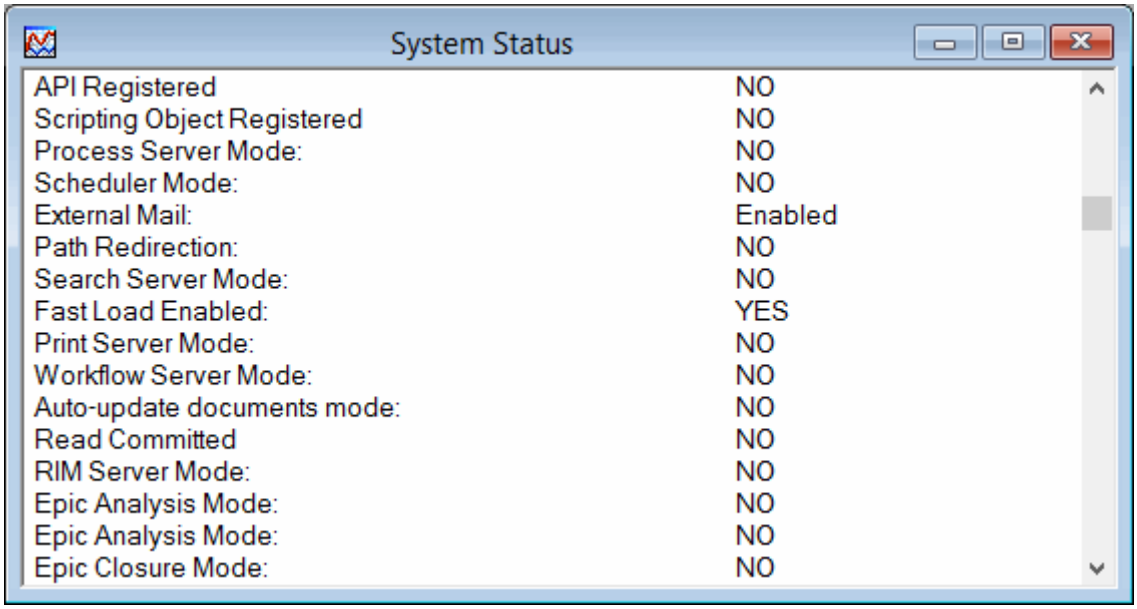
   If the license is not available in the drop-down list and it is not registered to any other workstation, it is possible that the module may not be licensed. Contact your system administrator to help determine the licenses that should be available.

4. After selecting the license to register the selected workstation for, click **Register**.
5. When you have finished registering workstations, click **Exit**.

Verifying and Revoking Workstation Registrations

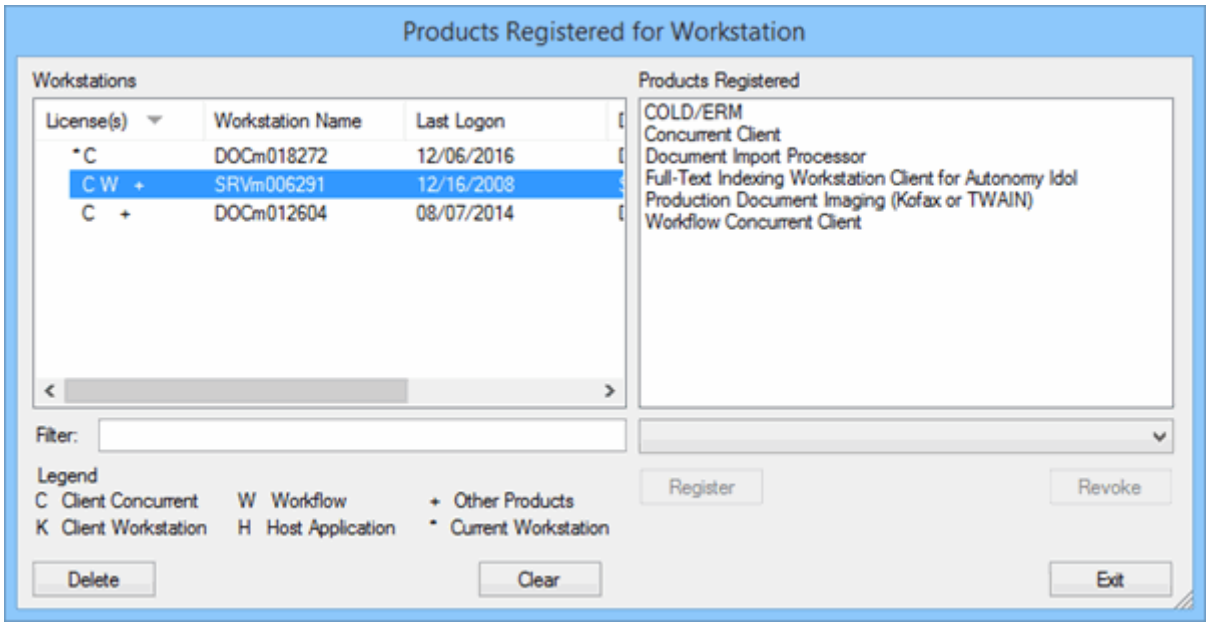
To view the products registered for the current workstation only, maximize the **System Status** dialog box. The **System Status** dialog box is always available in the main Client window. If it is minimized, it is displayed in the lower left corner of the main Client window.

At the bottom of the **System Status** window is a list of all products registered on the workstation and a status message for each.



To view the products registered for any workstations that have logged in to OnBase and revoke product registrations:

1. In the OnBase Client, select **Workstation Registration** from the **Admin | User Management** menu. The **Products Registered for Workstation** dialog box is displayed.



   The left pane of the screen displays a list of the workstations that have, at any time, been logged on to OnBase. The current workstation is shown at the top of the list and marked with an asterisk (*).
2. In the left pane, select the workstation to view the products registered for.

Tip: To filter the workstations displayed in the left pane, type the first few letters of the **Workstation Name** in the **Filter** field. The list is filtered to show only those workstations with a name that begins with the letters typed.

   The right **Products Registered** pane displays all products registered for the selected workstation.
3. To revoke a product registration, select the product registration to revoke in the right **Products Registered** pane and click **Revoke**.
4. To re-register a workstation, delete the old workstation by selecting it in the left **Workstations** pane and clicking **Delete**. All product rights held by the deleted workstation are returned to the list of available licenses found in the **Products Registered** drop-down list. This forces the user logging on from that workstation to register the workstation the next time they attempt to log on.

Clearing Excess Workstation Registrations

The number of workstations you can register for a given module is dependent upon the number of licenses you have purchased for that module. If you attempt to register a specific module on more workstations than you have licenses for, the excess workstations will be unable to use the module. When a user logs on to a workstation with one or more excess product registrations, a warning will be displayed to inform them what modules will not work on that workstation.

You can remove excess product registrations the same way you would remove a functional product registration. From the **Workstation Registration** dialog box, select the workstation that has excess product registrations.

To filter the workstations displayed in the left pane of the **Workstation Registration** dialog box, type the first few letters of the **Workstation Name** in the **Filter** field. The list is filtered to show only those workstations with a name that begins with the letters typed.

Any products that are registered in excess of the licensing limit will contain the **[Excess Registration]** string. Select the necessary products and click **Revoke** to remove the excess registration from the workstation.

To re-register a workstation, delete the old workstation by selecting it in the left **Workstations** pane and clicking **Delete**. All product rights held by the deleted workstation are returned to the list of available licenses found in the **Products Registered** drop-down list. This forces the user logging on from that workstation to register the workstation the next time they attempt to log on.

Workstation Cleanup

At some point, it may be necessary to delete workstations from the list in the **Products Registered for Workstation** dialog box. This may be necessary if there are many workstations on the list that are no longer accessing OnBase. One method of cleanup is to delete all of them and allow the list to regenerate as workstations are logged back on to OnBase. Alternatively, you can select the desired workstations and delete them in groups. If workstations are deleted inadvertently, they will be added back when the workstation is logged onto OnBase. If the current workstation is selected, an error message is displayed and it is not removed from the list.

To delete a workstation from the **Products Registered for Workstation**:

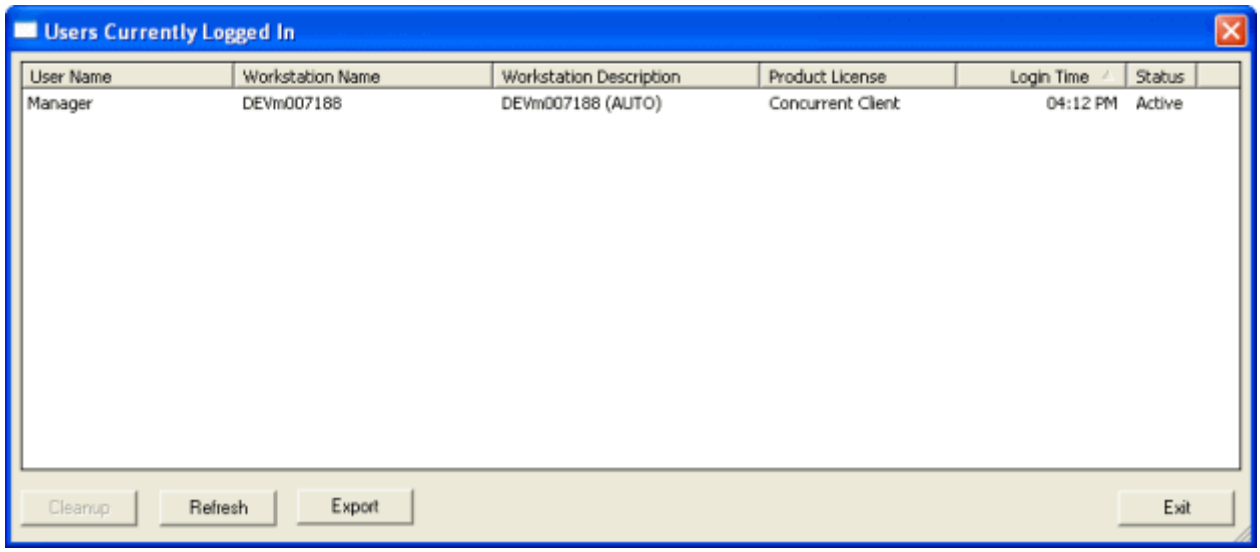
1. From the OnBase Client, click **Admin** | **User Management** | **Workstation Registration**. The **Products Registered for Workstation** dialog box is displayed.
2. The left side of the dialog box contains four sortable columns. The **Last Logon** column allows the user to delete all workstations that have not been logged on to OnBase during a specified period of time.
3. Select the desired workstations and click the **Delete** button.
4. Select **Exit** when finished.

View Current Users

View Current Users allows a user to view information about other OnBase users, including the time a user logged onto the system and the type of license being consumed by that user's workstation.

User entries can be removed, or cleaned up, from the **Users Currently Logged In** dialog box provided that the user is not trying to remove his or her own session and the session being cleaned up is not displaying an **Active** status.

To view current user information, select **Admin** | **User Management** | **View Current Users**. The **Users Currently Logged In** dialog box is displayed.



Performing EDI 835 Processing

EDI 835 processes are initiated and performed in the OnBase Client.

Initiate Processing (Client Module)

EDI 835 data files can be brought into OnBase using any of the following methods:

- Initiating the EDI 835 Process Format (**EDI Process** queue)
- Initiating a Process Job (**Process Job** queue)
- Ad-hoc import (**File Import** dialog box)

Note: The Windows® operating system architecture allows for a maximum number of items to be viewed in a list. Therefore, OnBase users will be able to view only the first 65,543 documents in a list generated by a process or retrieval.

File Formats According to Process

Process	File Format
EDI 130, 810, 835 or 837	XML

EDI 835 Process Formats

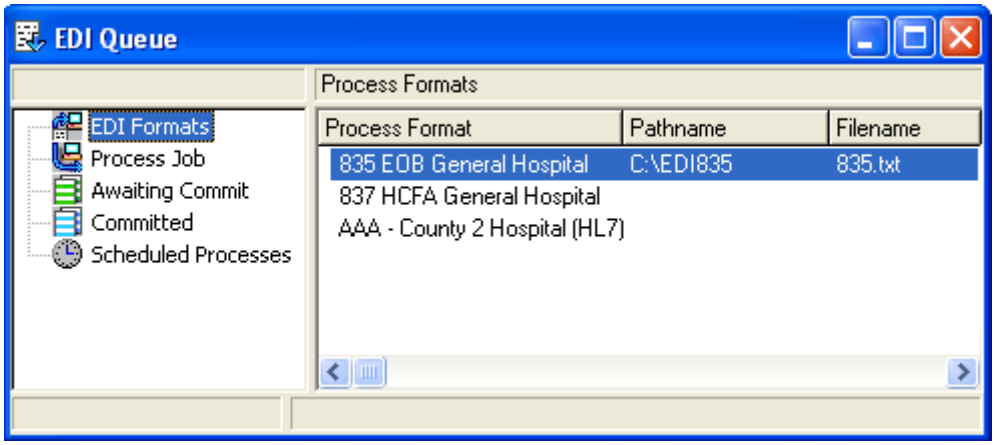
One method for importing EDI 835 data uses EDI 835 process formats to process the EDI 835 data file into individual documents that are imported into OnBase. EDI 835 process formats should be used when processing an EDI 835 data file into multiple documents and/or when there is more than an occasional file to import.

Processing via EDI 835 process formats can be initiated in any of these ways:

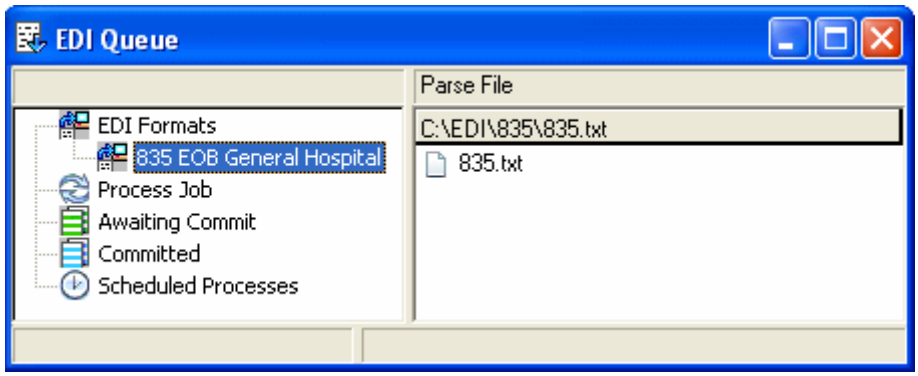
- Manual Initiation of an EDI 835 process format
- Manual Initiation of an EDI 835 process job
- Scheduling of an EDI 835 process format or job

To Initiate an EDI 835 Process Format Manually:

1. Open the EDI 835 Queue.
   a. From the OnBase Client, click **Processing** | **EDI**.
   b. With the **EDI Queue** window open, select the **EDI Formats** queue.



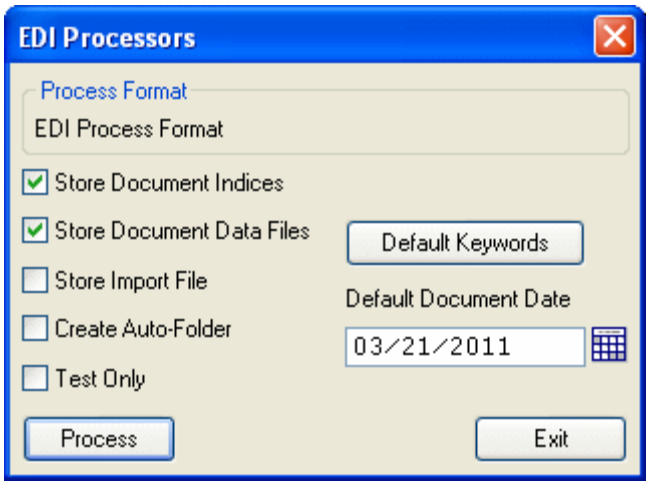
Note: If you double click the Process Format, the **Parse File** pane will display the import file(s) to be processed. The **Parse File** pane displays all files that will be processed. It will vary based on the process setup and the files that exist in the process directory. If the file(s) to process are not in the directory, nothing will be displayed. (Multiple parse files appear if a wildcard was used to identify the data in the EDI 835 Processor.)



   c. Highlight the Process Format to be used for processing and right-click to obtain the EDI 835 processing menu.

2. To schedule the EDI 835 process to run at another time, select **Schedule Format**. For more information on scheduling a process, see Scheduling on page 92.

   To initiate processing immediately, select **EDI Processor**. The **EDI Processors** dialog box. is displayed.



Process Format Option	Description
Store Document Indices	Stores the processed documents in the database, along with their keywords and document name. This option is selected by default.
Store Document Data Files	Moves the data file to the configured disk group at the completion of processing. This option is selected by default. This check box must be enabled for EDI 835 processing to occur.
Store Import File	Stores a copy of the EDI 835 import file in OnBase for archival purposes.
Create Auto Folder	As files are processed, they are stored in the auto folder currently assigned to the Document Type. **Note:** This option is only functional when foldering has been configured.
Test Only	Selecting this option will allow the process to run without actually creating any documents. A Verification Report is displayed, but the process occurs only in memory. **Note:** This option will not create EDI 835 documents in OnBase.
Default Document Date	Allows you to enter a date to be used as the Document Date for the documents that are imported via this process. Selecting this option will override any other configured Document Date, unless it is pulling the date from the file.

Process Format Option	Description
Default Keywords	Allows for the selection of Keyword Types and Values to be added to the batch name.
Process	Initiates the selected EDI 835 process.

3. Set the desired processing options and click **Process**.

   When complete, the batch will appear in the **Awaiting Commit** queue. Each batch is given a batch number, starting at 101. The batch number is available when viewing a document's properties.
4. Once processed, the batch is routed to one of several queues, depending upon the success of the process and if the batch has been committed:
   - **Incomplete Process**
   - **Awaiting Commit**
   - **Incomplete Commit**
   - **Committed**

Queue	Description
EDI Formats	Displays the currently configured EDI 835 Process Formats for selection. EDI 835 processing is initiated from this queue.
Process Jobs	Displays the currently configured Process Jobs (configured in any of the import processors). Process jobs are initiated from this queue.
Incomplete Process	Displays the batches that were not successfully processed. This queue is displayed only when a batch resides in it. Batches are routed to this queue if an error occurred during processing. Batches in this queue should be purged from OnBase.
Awaiting Commit	Displays the batches that have been processed and are waiting to be committed. This queue is displayed only when a batch resides in it. Batches in this queue can be committed or purged from OnBase.
Incomplete Commit	Displays the batches that were not successfully committed. This queue is displayed only when a batch resides in it. Batches are displayed in this queue if an error occurred during commit.
Committed	Displays the batches that were successfully processed and committed. Batches in this queue cannot be purged from OnBase.
In Progress	Displays batches that need to have additional external processing performed. Batches can only be routed to this queue from the **Committed** queue. Batches in the **In Progress** queue are locked, and are only available to the user who routed them to this queue.

To Initiate a Process Job Manually:

A Process Job is one or more Process Formats that have been configured to run sequentially at a specific time. A Process Job does not have to consist exclusively of a single type of Process Format. For example, one process job can be made up of a COLD Process Format and a DIP Process Format, or multiple COLD Process Formats.

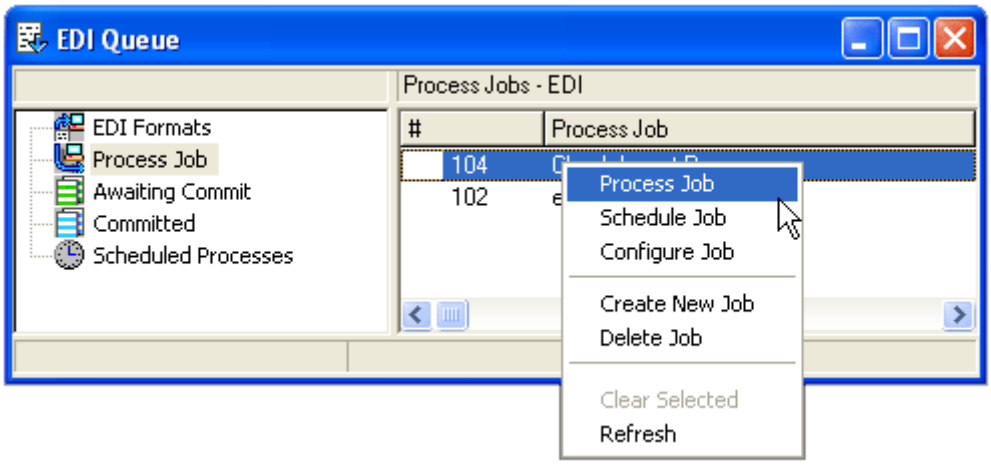
For information on creating and configuring a process job, see Configuring a Process Job on page 167.

Any currently configured Process Job can be initiated manually, or scheduled for processing. See Scheduling on page 92.

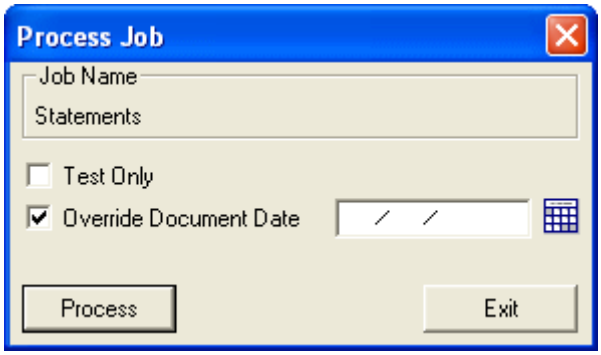
To manually initiate a Process Job:

1. Select the **Process Job** queue. The Process Jobs available for selection are displayed. Double-clicking on any Process Format displays the **Processes in Job** window.
2. The **Processes in Job** window displays all currently configured processors. Double-click on a processor to view the files currently defined for processing. Each varies based on the process setup and the files that exist in the process directory. If the file(s) to process aren't in the directory, nothing will be displayed. (For example, multiple jobs appear if a wildcard was used to identify the data for processing.)

3. From the **EDI Queue** window, highlight the **Process Job** queue. Then, highlight the Process Job to be used for processing, and select **Process Job** from the right-click menu.



The **Process Job** dialog box is displayed.



4. To perform a test run of the process job (no documents are actually imported into OnBase), select the **Test Only** check box.

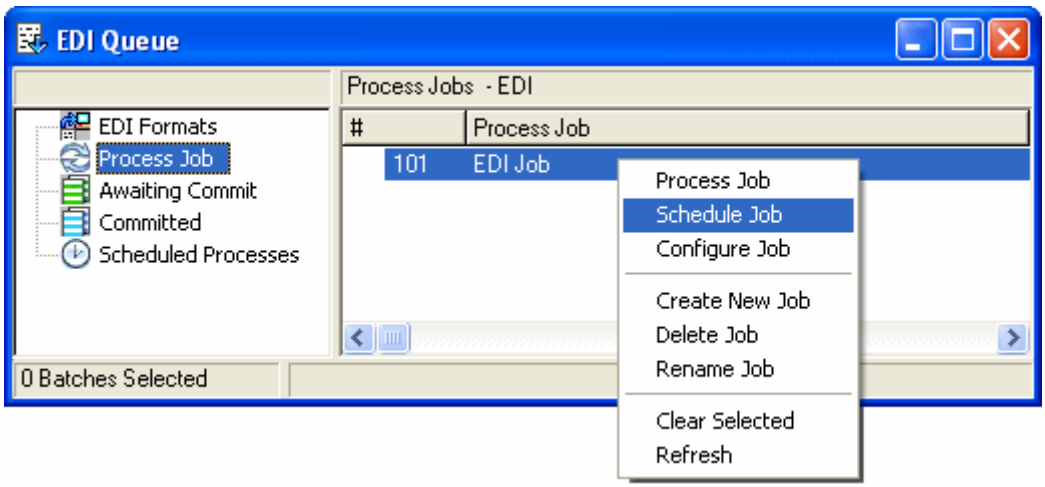
   To enter a document date other than the current date, select the **Override Document Date** check box and enter the desired **mm/dd/yyyy** in the **Override Document Date** field or click the **Calendar** icon to select the date from the calendar.

5. Click **Process**.

   When complete, the batch is displayed in the **Awaiting Commit** queue. Each batch is given a batch number, starting at 101. The batch number is available when viewing a document's properties.

To Schedule a Process Format/Process Job:

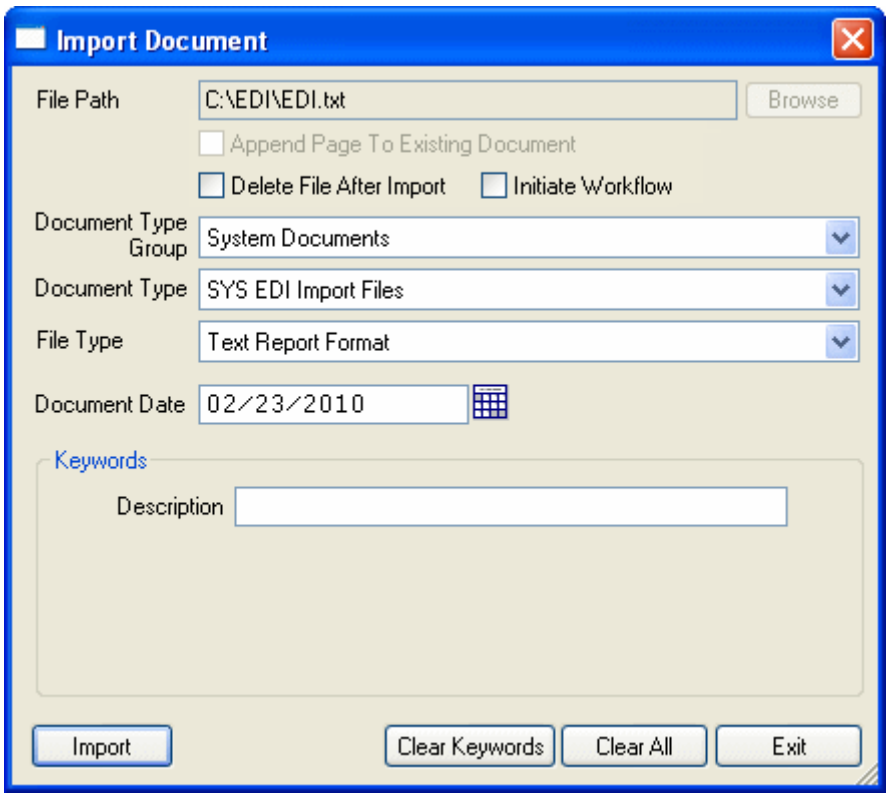
1. From the **EDI Queue** window, select the **Process Job** queue.
2. Select the Process Job to be used for processing, and select **Schedule Job** from the right-click menu. See Scheduling on page 92 for more information.



Import by File Import

Performing an ad-hoc import of an EDI 835 file allows you to import the entire file into OnBase as a single document.

1. From the OnBase Client, click **File | Import**. The **Import Document** dialog box is displayed.



2. Click **Browse** to browse to the location of the EDI 835 file to be imported.
3. Select all desired import options:
   - **Append Page To Existing Document** - select this option if you are importing an image file and want to append this file to an existing document in the same Document Type with the same File Type and Keyword Values.
   - **Delete File After Import** - select this option to delete the document from its original location after it is imported into OnBase
   - **Initiate Workflow** - select this option to add the imported document to a Workflow queue. For more information on this option, see the **Workflow** documentation.
4. Use the Document Type Group and Document Type drop-downs to select a Document Type Group and Document Type for the EDI 835 file being imported.
5. Use the **File Type** drop-down to select the file format for the file being imported. This field may be set by default.
6. Click **Import** to import the file into OnBase.

Processing Batches

When any of the processed data queues in the queue window are selected (**Incomplete Process**, **Awaiting Commit**, **Incomplete Commit**, and **Committed**), the batches associated with those queues are displayed. The following information fields are also displayed for each batch:

- **Batch #** - numeric label associating the batch with its column in the database
- **Batch Name -** name of the associated Process Format
- **Parse Date - Time** - date and time the data was processed
- **Item Date -** default Document Date specified by the user Commit Queues, as well as the Verification Report.

A variety of processing functions can be performed for a batch as it typically moves from an **Awaiting Commit** to **Committed** state. These functions are accessed from a right-click menu at the batch level. The same right-click menu is displayed for a batch in each of these queues, although the availability of each function may vary depending on the queue or type of data in the batch.

Note: The options available at the right-click menu are dependent on your configuration, user group rights, and licensed products.

Performing Batch Processing Functions from the Batch Level

Tip: You can click on any of the headings in the queue (**Incomplete Process**, **Awaiting Commit**, **Incomplete Commit**, and **Committed**) to sort by that heading. For example, click the **Batch #** to sort by ascending numbers. Click again to sort by descending number.

Tip: Default Keyword Types are automatically incorporated in the batch name. They can be used to aid in the identification of the batch in the **Awaiting Commit** and **Commit** queues, as well as the Verification Report.

Functions that apply to the entire batch are available from a right-click menu.

1. Select the queue that contains the batch to be processed. Batch processing functions are available in the **Incomplete Process**, **Awaiting Commit**, **Incomplete Commit**, and **Committed** queues.

   Select the batch to be processed and right-click to obtain a list of options.
2. Available options vary depending on your system setup. Select an option to initiate its function.

Perform Batch Processing Functions from the Document Level

You can also perform functions across all of the documents in a batch.

1. Select the queue that contains the batch to be processed. Batch processing functions are available in the **Incomplete Process**, **Awaiting Commit**, **Incomplete Commit**, and **Committed** queues.
2. Select the batch to be processed and double-click to display a list of the documents contained in the batch.
3. Select a document or documents and right-click to obtain a list of options.
4. Available options vary depending on your system setup. Select an option to initiate its function.

Batch Processing Options

A variety of processing functions can be performed for a batch as it typically moves from an **Awaiting Commit** to a **Committed** state.

These functions are accessed via a right-click menu at the batch level. The same right-click menu is displayed for a batch in each of these queues, although the availability of each function may vary depending on the queue, or the type of data in the batch.

This list contains all common right-click processing functions. You may have additional options depending on your processing module.

Note: The options available at the right-click menu are dependent on your configuration, user group rights, and licensed products.

	Availability			
Menu Item	**Awaiting Commit**	**Commit**	**Incomplete**	**Description**
Commit Selected	**X**			Initiates the committing of data. Committing copies the documents from the batch into the assigned Disk Group's second (redundant) copy. Once committed, the batch cannot be purged from the Disk Group.

	Availability			
Menu Item	**Awaiting Commit**	**Commit**	**Incomplete**	**Description**
Begin Processing		**X**		Sends the batch to the **In Progress** queue. The batch in the queue is not available to any other user, and the batch can only be in one user's **In Progress** queue at a time. The batch will still be available from its original queue and all queue functions will still be available, except the function to move the batch into an **In Progress** queue.
Complete Processing				Returns the batch to the **Committed** queue and releases the batch lock. This option is only available for batches in the **In Progress** queue.
Allow Scheduled Commit	**X**			Allows the selected batch that contained processing errors to be committed during the next scheduled commit.
View Verification Report	**X**	**X**	**X**	Displays the Verification Report associated with the batch in a separate viewing window.
View Unidentified Items	**X**	**X**	**X**	Displays the documents in the batch that were not identified by any Document Type in a separate viewing window.
Print Selected	**X**	**X**	**X**	Prints all items associated with the batch (e.g., documents, unidentified items and the Verification Report) using the specified printer.
Export Selected	**X**	**X**	**X**	Displays the Export Manager for export of the batch.
Perform Custom Process	**X**			Executes a user-defined DLL for the selected batch. The DLL must be named **mzbatchprocess.dll** and it must exist somewhere in the DOS path (the operating system directory is recommended).

	Availability			
Menu Item	**Awaiting Commit**	**Commit**	**Incomplete**	**Description**
Create List Report	**X**	**X**	**X**	Generates a list report of processing statistics for the batch. The report is stored in the **SYS List Contents Reports** Document Type.
Create Keyword List	**X**	**X**	**X**	Generates a text file that contains the values of user-specified Keyword Values from selected documents. The text file produced is an ordered file that can be viewed/manipulated by other programs or processed via an AutoFill Keyword Set Processor.
Run Script	**X**	**X**	**X**	Executes a predefined script (created in the Configuration module) on the batch.
View Batch Printing Reports	**X**	**X**	**X**	Generates a report detailing the processing and batch rendering of the statements. Depending on the settings, this report will contain information for every statement that was printed, or it will only contain errors encountered in the rendering process. These reports are stored in the **SYS Batch Printing Reports** Document Type.
Extract Index Information	**X**	**X**	**X**	Stores all Keyword Values identified during processing in an index extraction file. (An Index Extraction Format must be pre-configured for use with the file.) An index extraction file (.txt) is generated in the directory location indicated in the Index Extraction Format when the EDI 835 processor is run. The file produced can be used for viewing or used as ordered field values in an Ordered DIP process. **Note:** If there are multiple Keyword Values associated with one Keyword Type, only the first Keyword Value listed will be extracted.

	Availability			
Menu Item	**Awaiting Commit**	**Commit**	**Incomplete**	**Description**
Re-Date Batch	**X**	**X**	**X**	Changes the default Document Date stored for the batch and for all documents that reside in the batch. The new date is used as the Document Date (**%D2**) in the auto-name string.
Clear Selected	**X**	**X**	**X**	Deselects the currently-selected batch.
Select Batch Range	**X**	**X**	**X**	Allows for selective highlighting of multiple batches within the **Batch#** range of the queue.
Locate Batch	**X**	**X**	**X**	Allows you to search for a batch within the queue. The first batch containing the search string is selected.
Purge Selected	**X**		**X**	Removes the batch and all documents, unidentified items and the Verification Report associated with it from OnBase.
Refresh	**X**	**X**	**X**	Redisplays the queue and its contents.

Verifying the Process

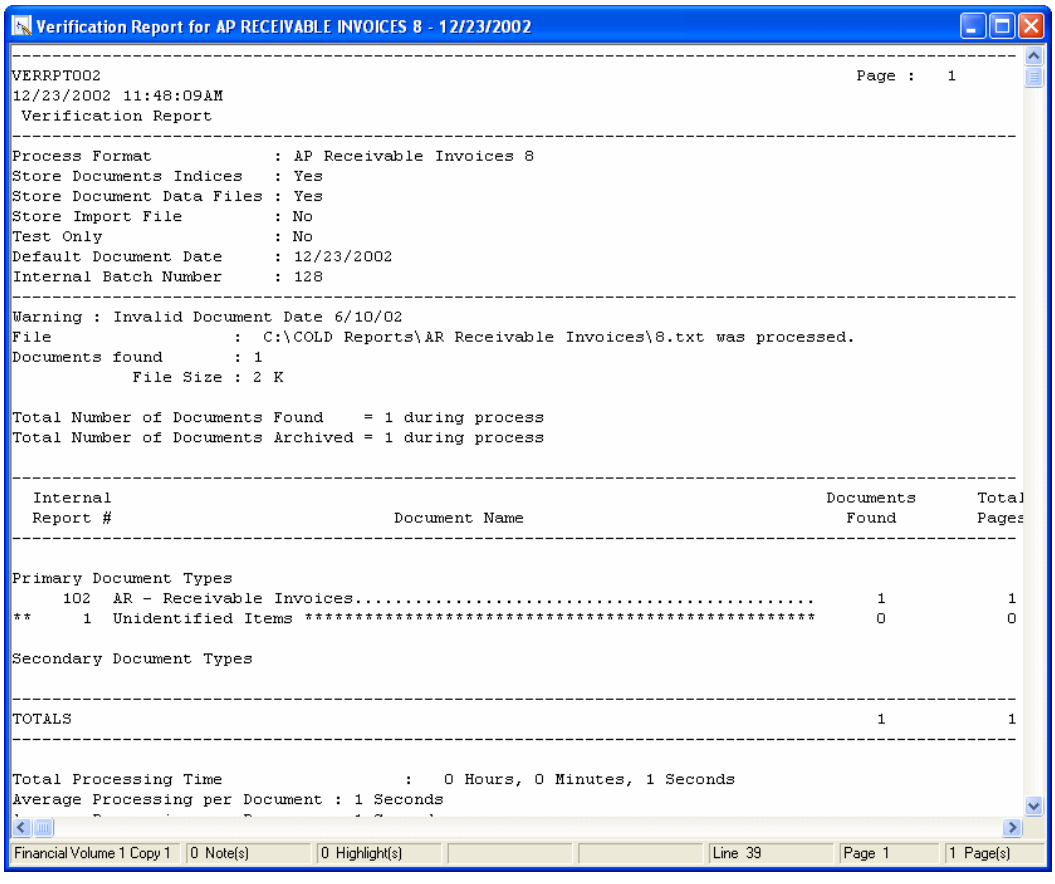
After the process has run, a new batch is displayed in the **Awaiting Commit** queue. This batch must be verified to ensure that the process ran successfully and that no errors were generated. To verify the batch:

1. Select the **Awaiting Commit** queue on the left side. On the right side, select the newly created batch. Right-click and select **View Verification Report**.

Note: When viewing the batch from the **Awaiting Commit** queue, all documents contained in the batch are listed, even those that the user does not have rights to view. However, a user may only work with (i.e., view, view Keyword Values, print, delete, etc.) the documents in the batch that he/she has rights to.

The Verification Report displays information on the process, including what was processed, the length of time, the format run, the documents found, any errors generated, and the total number of pages and documents processed.

It is important to look for any errors that have occurred. Additionally, the number of unidentified documents should be zero. If this is not the case, the unidentified items must be viewed. The process may need to be modified to accommodate these items.



2. Examine the documents.

   Once the Verification Report has been viewed, the documents in the batch can also be examined. Double-clicking on the batch will display all the documents in the batch, and double-clicking on a document opens it in the Document Viewer.

Note: In any process that includes a date, Windows Regional Settings can affect date formatting. If the date or date and time Keyword Types are not being populated correctly, the Keyword Type may be configured incorrectly for your Regional Settings. The correct format is YYYY-MM-DD HH:MM:SS. This format will work regardless of what the Regional Settings are.

3. View the Keyword Values associated with the documents in the batch.

   To verify the Keyword Values associated with a document in the batch, right-click on the document and select **Keywords**. The **Add/Modify Keywords** dialog box is displayed; view the Keyword Values displayed in this dialog box to ensure that they match the document.

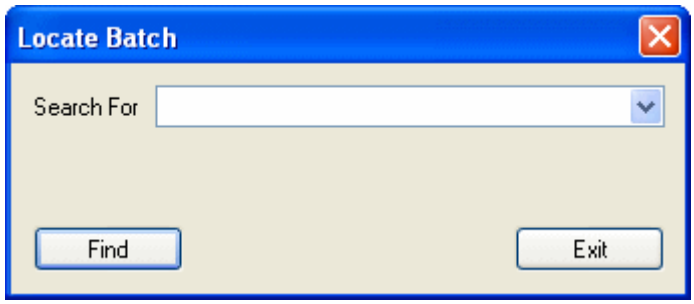
   Additionally, depending on the Document Type's configuration, the auto-name string, or the name of the document displayed in the results list, may contain one or more of the Keyword Values associated with the document. If these Keyword Values are missing or are displayed incorrectly, the process may need to be reconfigured.

Locating a Batch

It may be necessary to quickly and easily locate a specific batch in a queue (such as to commit or purge it), and this may be difficult if there is a large number of batches in the queue.

To search for a batch within a queue:

1. Select the queue that the batch resides in (e.g., **Awaiting Commit**, **Committed**, **Incomplete Commit**).
2. Right-click in the **Processed Batches** window and select **Locate Batch**. The **Locate Batch** dialog box is displayed.



3. Enter the text string you wish to search for in the **Search For** field. You can repeat a previous search by selecting a previously-used search string using the **Search For** drop-down.
4. Click **Find**. The first batch in the queue containing the search string in its Batch #, Batch Name, Parse Date or Item Date is selected.

Committing a Batch

Once a batch has been examined and determined to be acceptable, it should be committed.

To commit a batch:

1. Select the **Awaiting Commit** queue.
2. Select the desired batch.
3. Right-click and select **Commit Selected**.

When a batch is committed, it will move to the **Committed** queue. This queue maintains all batches that are in OnBase. Once a batch is committed, it can no longer be purged. Individual documents can be deleted by right-clicking on them in the results list and selecting **Delete**.

Note: Although all documents in the batch are listed, even those that you may not have rights to, you may only delete documents belonging to a Document Type that you have rights to.

Batches in **Awaiting Commit** must be committed or purged; a failure to do so may compromise the integrity of your OnBase solution because uncommitted documents are only stored in the first, mass storage copy of the Disk Group. When a batch is committed, the documents are copied to other copies of the Disk Group copies.

Tip: Prior to upgrading to a later version of OnBase, all batches must be committed.

For more information about purging a batch, see Purging a Batch on page 166.

Purging a Batch

If the process was unsuccessful, the configuration of the process format should be modified and the process run again. Batches that were unsuccessfully processed should be purged. To purge a batch:

1. Select the **Awaiting Commit** queue.
2. Select the desired batch.
3. Right click and select **Purge | Purge Selected**.

All items associated with the batch (e.g., documents, unidentified items and the Verification Report) are permanently deleted from the Disk Group and all database entries for the documents in the batch are removed.

Processing and the Verification Report

Regardless of how EDI 835 processing was initiated, the **Processor Status** bar is displayed, indicating each of the following stages of data processing:

- **Copying File**. When a process is initiated, OnBase takes a “snapshot” of the directory indicated in the **Default Directory** field. Only those files that were in the directory at that time will be processed. OnBase then copies the first data file to the OnBase temporary directory. That file is then removed from the original location.

- **Analyzing File**. OnBase reads the file, looking for the beginning of the page. Once the Document Type is determined for that page, OnBase looks for any configured Keyword Values and pulls them from the page. This data is stored in the OnBase database.

Note: Information is identified on the first line based on Segments and Elements.

If more data files exist in the **Default Directory**, these steps are repeated until all data files have been processed.

After the entire process has been run, the batch will be located in the **Awaiting Commit** queue. Double-clicking on the batch displays all the documents found by the EDI 835 process. While a batch is in the **Awaiting Commit** queue, the data files and index information can be purged from OnBase if any error occurred during the process. Otherwise, it may be committed.

The last document in the batch is the Verification Report. This report should be reviewed for errors and used to determine whether or not the batch should be committed.

The Verification Report provides you with detailed information about the processing, including the total amount of time the batch took to process, the files processed, and the documents found. A Verification Report is generated every time a process is run.

Performing A Custom Process

Custom processes are programs that perform an action or actions on documents in a queue. DLL custom process program files must be named **mzBatchProcess.dll** and must reside in the directory that contains your system files.

Note: Properly configuring a custom process requires that you work closely with your system provider. Contact Technical Support to discuss custom processes.

Run a Process

Custom processes can be associated with documents imported by the EDI 835 Processor. To run a custom process, right-click on a batch in the **Awaiting Commit** queue and select **Perform Custom Process.**

Configuring a Process Job

A Process Job is one or more Process Formats that have been configured to run sequentially. A Process Job does not have to consist exclusively of a single type of Process Format; it can contain any process format for any process that the user creating it has rights to.

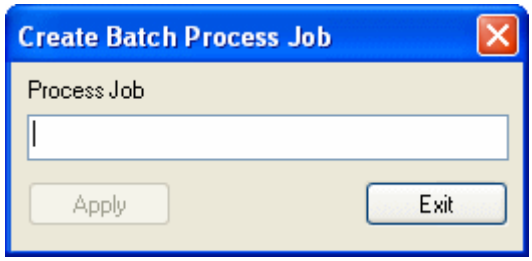
Before creating a process job, you must create one or more process formats to be included in the job.

Creating a Job

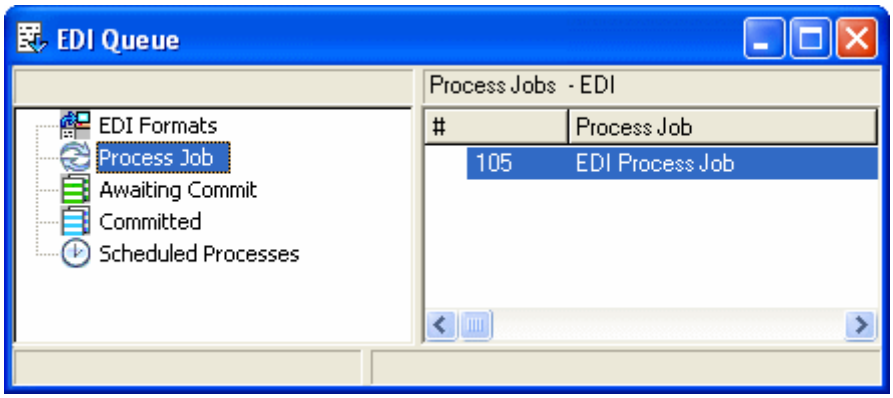
To create a process job:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on the window and select **Create New Job**.

   Or, from the **EDI Queue** window, select **Process Job**, right-click in the **Process Jobs** pane, and select **Create New Job**.
2. The **Create Batch Process Job** dialog box is displayed.



Enter a name for the job in the **Process Job** field and click **Apply**. The job is added to the process queue and is listed in the **Process Jobs** window.



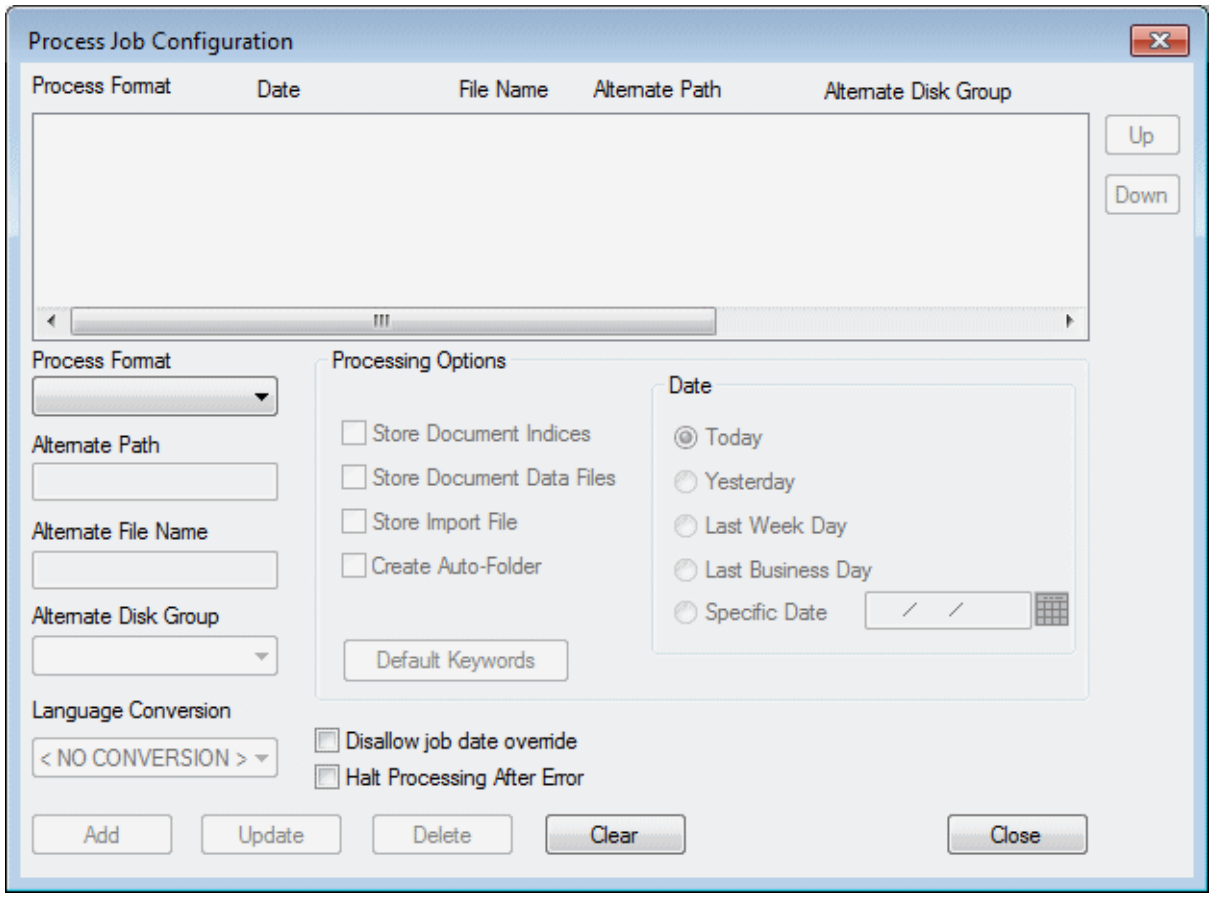
Note: The process name must be fewer than 75 characters long.

Configuring the Process Job

To configure a job:

1. From the **Process Jobs** window or the **EDI Queue** window, select the process job to be configured, right, click and select **Configure Job**.

   The **Process Job Configuration** window is displayed.



2. Using the **Process Format** drop-down, select a process format to be added to the process job.

   The remainder of the options on the **Process Job Configuration** window are enabled.

3. As needed, specify the process job configuration options for the selected process format.

Process Job Parameter	Description
Alternate Path	Enter an alternate path to the data to be processed (i.e., the **Default Directory**) to use instead of the **Default Directory** configured for the selected process format. If an alternate path is not specified, the process format's **Default Directory** is used.
Alternate Filename	Enter an alternate file name for the data to be processed (i.e., the **Default File Name**) to use instead of the **Default File Name** configured for the selected process format. If an alternate file name is not specified, the process format's **Default File Name** is used.
Alternate Disk Group	Enter an alternate Disk Group to store the data being processed instead of the Disk Group configured for the selected process format. If an alternate Disk Group is not specified, the process format's default Disk Group is used.
Language Conversion	Used to specify a language conversion if the source data file was created using a different ASCII code page. If a language conversion is not specified, the process format's **Language Conversion** setting is respected. **Note:** This option is only used for legacy language conversions. For most systems, the default **<NO CONVERSION>** option should be selected. Contact your first line of support before changing this option.
Store Document Indices	Select this option to store the processed documents in the database, along with their Keyword Values and document name. This option is enabled by default.
Store Document Data Files	Select this option to move the data file to the configured Disk Group after the process is complete. This option is enabled by default.
Store Import File	Select to store a copy of the import file used to import documents into OnBase for archival purposes.
Create Auto Folder	Select to provide the ability to Auto-Folder documents upon processing. See the Folders documentation for additional information regarding Auto-Foldering. **Note:** Not all processors offer the ability to Auto-Folder documents upon processing. See each individual processor's documentation for more information.

Process Job Parameter	Description
Default Keywords	Click the **Default Keywords** button to select Keyword Types and Values that are displayed in the Batch Name for that Process Job when it is processed. These Keyword Types and Values are also displayed at the top of the Verification Report for that job. **Note:** Only Keyword Types that have been configured for Document Types used in the Process Job are selectable. **Note:** If a check process format is configured as part of the job, the **Default Keywords** button is disabled when the job is selected.
Disallow job date override	Select this option to prevent users from overriding the specified job date.
Halt Processing After Error	Select this option to halt processing for the process job if the configured process format generates an error. Any other process formats configured for the process job will not be processed.
Date	These settings allow a user-defined **Document Date** to be stored for the processed documents. This date is used as the **%D** parameter that appears in the document's Auto-Name string.

4. Click **Add** to add the process format to the process job.
5. Repeat Steps 2-4 for each process format that you would like to add to the job.
6. When the process job is run, the process formats are run in the order in which they are displayed in the **Process Job Configuration** window.

   To change the order in which process formats are performed as part of a process job, select a process format from the Process Format list and click **Up** or **Down**.
7. Once all process formats have been added to the process job and are listed in the desired order, click **Close**.

Modifying a Process Job

To modify an existing process job:

From the **Process Jobs** window or the **EDI Queue** window, select the process job to be modified, right, click and select **Configure Job**. The **Process Job Configuration** window is displayed.

Modify the process job as needed; for more information about the options available, see Configuring a Process Job above.

Renaming a Job

To rename an existing job:

From the **Process Jobs** window or the **EDI Queue** window, select the process job to be modified, right, click and select **Rename Job**. The **Rename Process Job** dialog box is displayed.

Enter the new name for the job and click **OK**.

Scheduling a Process Job

To schedule a process job to run automatically:

From the **Process Jobs** window or the **EDI Queue** window, select the process job to be scheduled, right, click and select **Schedule Job**.

For more information on scheduling a process job, see the Scheduling chapter.

Deleting a Job

Caution: If you delete a process job that is scheduled, it will be deleted from the list of scheduled jobs.

To delete a process job:

1. From the **Process Jobs** window or the **EDI Queue** window, select the process job to be modified, right, click and select **Delete Job**. A confirmation message is displayed.
2. Click **OK**. The job is deleted.

Retrieving and Viewing Imported Documents

From the OnBase Client, you can retrieve and view documents imported via the EDI 835 processor, just as you can retrieve and view documents that have been imported in any other manner (i.e., ad-hoc imported, scanned, etc).

Depending on the configuration of the process format that was used to import the documents, documents imported via the EDI 835 processor may be available as PCL renditions, in addition to their native XML format.

To select a rendition of a document to view, right-click on the document to be viewed in the Document Search Results list and select **Revisions/Renditions**.

See the OnBase Client documentation for information on retrieving and viewing documents in the Client.

System Administration and Preventive Maintenance

Administration and maintenance of the EDI 835 module consists of the following:

1. Check to make sure batches are being committed on a regular basis.
2. Check to see if there are any incomplete processes or incomplete commits.

3. Run Configuration Reports after any new Disk Groups, Document Type Groups, Document Types or Keyword Types are configured in OnBase for a new EDI 835 process.
4. Periodically, check documents that have been imported via the EDI 835 processor to ensure that the processes are accurate.
5. Check Daily Verification Reports (Accumulate Processing Information).
6. Check Batch History.

Regular Committing of Batches

While documents are in the **Awaiting Commit** queue, they only exist in the first mass storage copy of the Disk Group. If the mass storage copy is stored on a drive that fails and a backup is not available, the documents are lost. Also, every OnBase solution has a limit to the number of batches that can exist in the **Awaiting Commit** queue. Once this limit is met, no new processing is allowed. This limit is set during installation.

When documents are committed, their status is changed to **Committed** in the OnBase database and they are copied to any secondary mass storage and removable copies of the Disk Group.

Tip: It is considered a best practice to commit documents during non-peak hours to avoid a bottleneck when accessing the OnBase database.

After a batch is committed, it is displayed in the **Committed** queue. This queue contains all of the EDI 835 batches processed and committed in OnBase. It will never reach a limit; it simply displays the status of the batches.

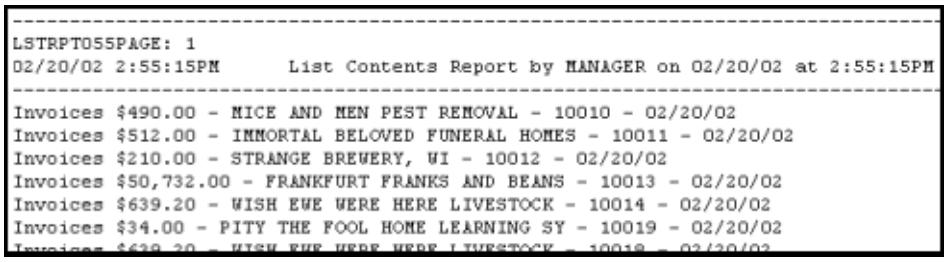
Once the batch has been committed, the batch cannot be purged. In order to delete the documents in the batch, double-click the batch to open it, select the desired documents, right-click and select **Delete Selected**.

When viewing a batch in the **Committed** queue, the following right-click options are available:

- **View Verification Report** - Displays the Verification Report for the batch.
- **View Unidentified Items** - Displays a results list with all unidentified documents in the batch.
- **Print Selected** - Prints the documents in the selected batches.
- **Export Selected** - Exports the documents in the highlighted batches.

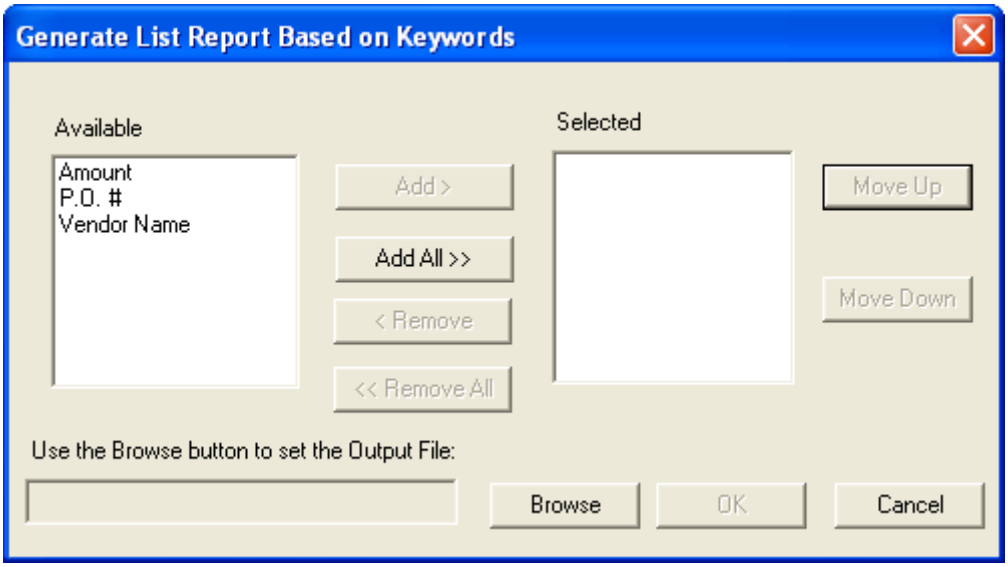
Note: This option is only available if OnBase is licensed for an export and publishing module. For more information, see the **Export & Publishing** module reference guide.

- **Create List Report**. Generates a **SYS List Contents Report** that displays the names of the documents (in other words, the autoname strings) that reside in the selected batches.



```
LSTRPT055PAGE: 1
02/20/02 2:55:15PM      List Contents Report by MANAGER on 02/20/02 at 2:55:15PM
Invoices $490.00 - MICE AND MEN PEST REMOVAL - 10010 - 02/20/02
Invoices $512.00 - IMMORTAL BELOVED FUNERAL HOMES - 10011 - 02/20/02
Invoices $210.00 - STRANGE BREWERY, WI - 10012 - 02/20/02
Invoices $50,732.00 - FRANKFURT FRANKS AND BEANS - 10013 - 02/20/02
Invoices $639.20 - WISH EWE WERE HERE LIVESTOCK - 10014 - 02/20/02
Invoices $34.00 - PITY THE FOOL HOME LEARNING SY - 10019 - 02/20/02
```

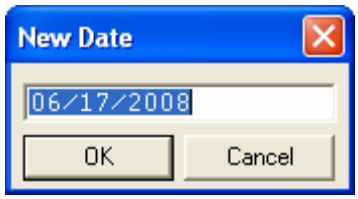
- **Create Keyword List**. Allows a user to export a file listing Keyword Values. To create a Keyword List, select the Keyword Types associated with the values you would like to export in the **Available** list and click **Add**. The Keyword Types are added to the **Selected** list on the right. Select **Browse** to designate the output file, then click **OK**.



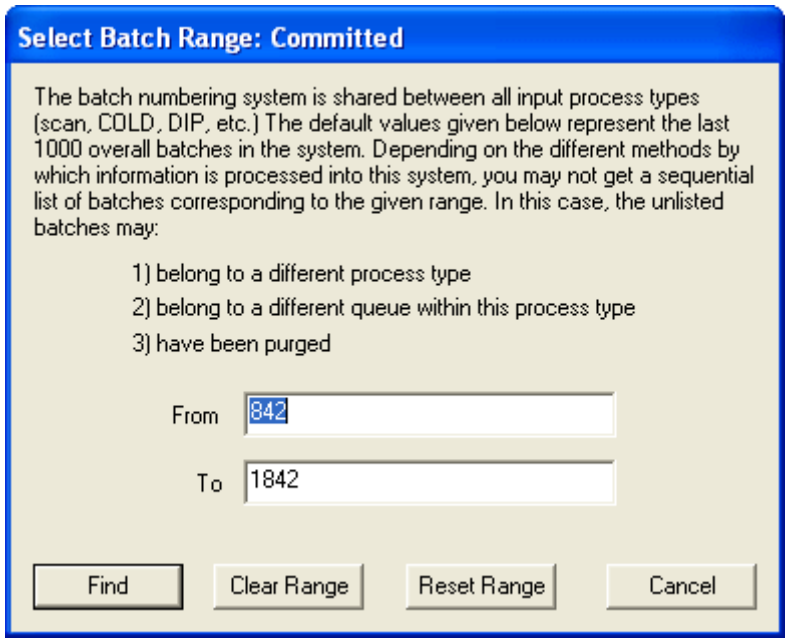
Tip: The **Create Keyword List** option is useful for creating a text file that can be imported into another system for verification or updating another application.

- **Run Script**. Displays a list of all the custom-created VBScripts that the user has access to. This option will run the selected VBScript against the selected documents.
- **Extract Index Information**. Extracts information based on the configuration of the index extraction format. This format is created and defined in the OnBase Configuration module.

- **Re-Date Batch**. Allows you to modify the Document Dates for items in the batch. Since most document auto-name strings contain the Document Date, this option will rename the documents as well. Depending on the number of documents in the batch, this may take some time.



- **Clear Selected**. Removes the focus from the currently-selected batch.
- **Select Batch Range**. Allows users to select a range of batches to view in the queue. This is useful because the **Committed** queue will contain all of the committed EDI 835 batches.



- **Refresh**. Updates the contents of the queue. Selecting this option displays any new items that have been added to the queue and removes any items that have been moved out of the queue.

Incomplete Process and Incomplete Commit Queues

Two additional queues that may be displayed are the **Incomplete Process** queue and **Incomplete Commit** queue. These queues are only displayed if an error occurs during processing.

- **Incomplete Process**. This queue contains batches that did not process completely. Some reasons a batch may end up in the **Incomplete Process** queue:
  - The processing machine encountered an operating system error.
  - Power to the processing workstation was interrupted.
  - The server hosting the OnBase database was shut down or disconnected from the network during processing.

  If you have any batches in this queue, you should first verify the reason the batches did not process correctly. After the cause of the error has been determined and corrected, you should purge all batches in this queue and re-process them.
- **Incomplete Commit** – This queue contains batches that were not committed completely. The following are some reasons a batch may end up in the **Incomplete Commit** queue:
  - The secondary mass storage or removable copies were not available. This could be a network security issue.
  - The processing workstation was shut down prior to completing the commit.

  After the cause of the error has been determined and corrected, these batches should be re-committed.

Run Configuration Reports

Configuration Reports detail the exact configuration of items in OnBase. With this information, troubleshooting and communications with support are greatly improved. Additionally, Configuration Reports are stored in OnBase, so there is a historical record of the structure of your OnBase solution.

To run a Configuration Report:

- From the OnBase Configuration module, click **Report** and select one of the menu options (Document Type Groups, Document Types, Keyword Types, and so on) to generate a report for that item.

  Selecting **Run All Reports** will generate all reports. Reports are stored in OnBase as **SYS - Configuration Reports** documents and can be retrieved and viewed in the OnBase Client.

Whenever new items are created or a process is changed, a Configuration Report should be run. New Configuration Reports should be generated after a process is created or changed, or when any Disk Groups, Document Type Groups, Document Types or Keyword Types are create or modified.

Ensure Processes are Accurate

Documents that have been imported via the EDI 835 processor should be periodically checked to ensure that the processes are configured accurately. It is important to not only review the Verification Reports, but to examine the processed documents, review their Keyword Values and visually inspect all pages.

Tip: It is considered a best practice to randomly review documents and Keyword Values at least every few weeks to ensure that there are no issues preventing new documents from being processed correctly.

To check the documents for accuracy:

1. Open the batch by double-clicking on it in the appropriate queue or the **Document Retrieval** screen. A list of the documents residing in the batch is displayed.
2. Double-click on any document to view it.
3. To review a document's Keyword Values:
   - Right-click on the document in the results list and select **Keywords**.
   - Right-click an open document and select **Keywords**.

   The **Add/Modify Keywords** dialog box is displayed.
4. Examine the Keyword Values. If they do not exist or are not accurate, enter the correct value(s) in the appropriate text field and click **Save**.
5. Review the EDI 835 process format that was used to import the documents to ensure all Keyword Types are configured correctly.

Check Daily Verification Reports

You should periodically review the Daily Verification Report to ensure that your processes are configured correctly and are processing without errors.

To view the Daily Report in the OnBase Client, select **Processing | View Daily Report**.

Note: For more information on using Daily Verification Reports, see Can Multiple Processes be Added to a Single Verification Report? on page 191.

View Batch History

The **Batch History** tab displays information about the batch in which a document was imported into OnBase. From an open document or the **Document Search Results** list, right-click and select **History**. The **Document History** dialog box displays all recorded batch actions in the **Batch History** tab.

Batch History

The following information is available on this tab:

- **Log Date** - the date the information was logged.
- **Log Time** - the time the information was logged.
- **User Name** - the name of the user who performed the interaction.
- **Batch Num** - the numeric label associating the batch with its column in the database.
- **Detail** - the type of interaction performed, such as the committal of the batch.

Note: The creation of a batch is not logged in the **Batch History** tab.

Generating a Document History Report

To generate a document history report, right-click in the **Document History** dialog box and select **Generate Report**. The new report is generated and displayed.

This report is stored in the **SYS - User Reports** Document Type and can be retrieved using this Document Type as a search criterion.

View SYS Unidentified Items

Unidentified items residing in batches imported via the EDI 835 processor should be examined when they are created. It is vital to determine the cause of any errors and correct them because it is possible that the unidentified items may be important documents.

To review all **SYS Unidentified Items** in OnBase:

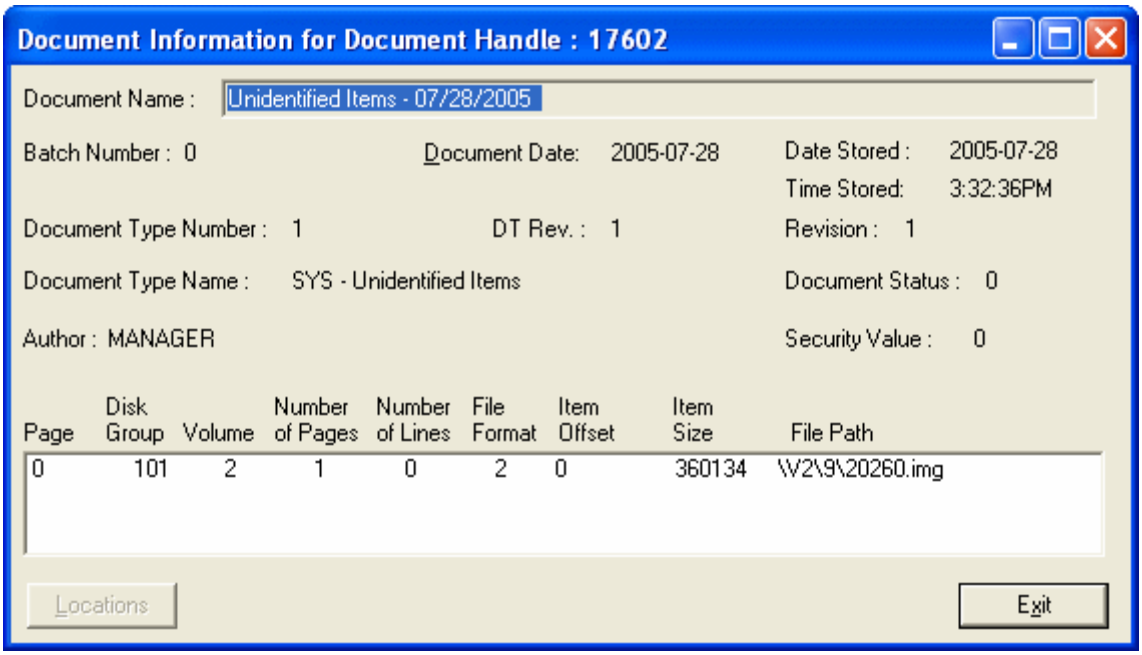
1. From the OnBase Client, click **File | Open | Retrieve Document** or click the **Retrieve Documents** button on the toolbar.

   The **Document Retrieval** window is displayed.
2. Select the **System Documents** Document Type Group and select the **SYS Unidentified Items** Document Type.
3. Click **Find**. Ideally, no documents should exist.

   If documents are found, view them to verify that they are actual documents. Occasionally, extra form feeds or extraneous characters may be separated and stored as unique documents. If the item is an actual unidentified document, the process used may need to be modified.

To determine which batch the document belongs to, right-click the document in the results and select **Properties**, or right-click on the open document and select **Properties**. The **Document Information for Document Handle** dialog box is displayed; the batch number of the document is shown in this dialog box.



Once the Batch Number is determined, the process format used to import the document and the queue in which the batch resides in can be determined.

Ensure Temporary Space is Sufficient

The **Temporary Parse Path** should be on the local processing machine. This location must be of sufficient size to hold the largest file that will be processed. However, over time, as more applications are loaded onto the workstation, this space may be reduced.

If there is insufficient space, a process will be unable to complete. Using Windows Explorer or another file management utility, check to make sure enough space is available. It is considered a best practice to keep at least as much space as the largest file being processed.

Keep in mind, particularly if the **C**: drive is used, that other applications may generate temporary files, and that the operating system will generate a memory file that could reduce the total amount of space available. All of these factors should be taken into account.

In general, if the temporary location is on the same drive as the operating system, 500MB of free space should be maintained at all times. If the machine is a database server as well, or running file services, at least 1 GB should be available.

Monitor Disk Group Space

Processing will reduce the amount of space available in mass storage copies. These hard drive/RAID locations are typically managed via Platter Management in the Client. However, if there are other Disk Groups or applications using the same storage facilities, the space may not be available for the process. It is important to check the storage location using Windows Explorer or another file management application to verify that the mass storage copy has enough space to maintain the required volumes.

Monitor Database Space

As documents are processed into OnBase, the database will grow. Growth depends on the number of documents, the number of Keyword Types and Keyword Values, as well as other processes in OnBase those documents are a part of, such as Workflow. With every OnBase system, the database should be periodically checked. Even if the database has been configured for restricted growth, it is better to anticipate reaching that point rather than encountering it during processing.

There are several ways to verify the size of a database. One is to observe the database files themselves as well as the log file and determine the total amount of space consumed. In addition, databases may have specific size requirements for different database files. The database server software itself will detail the statistics for the files including how much space is currently being used and how much is available. If the database was sized during installation, only the database server software can detail how much is in use.

Clean Up Queues

Make sure batches are being committed within a day or two. Commit any batches that reside in the **Awaiting Commit** queue by right-clicking on them and selecting **Commit Selected**. Delete any processes that are no longer being used. Delete any jobs that are not used. Remove any items from the **Incomplete Process** queue by right-clicking and selecting **Purge Selected** | **Purge Selected** from the right-click menus.

Note: Before purging any batches, you should first verify the reason the batches did not process correctly. After the cause of the error has been determined and corrected, you should purge all batches in the **Incomplete Process** queue and re-process them.

Check Batch Locks

Batches are locked when they enter the **In Progress** queue. When a batch is locked, only the user who routed the batch into in the **In Progress** queue can access or process the batch. In some cases, batch locks may persist even after a batch is removed from the **In Progress** queue (for example, if an unexpected shut-down occurs during processing). Batch locks should be checked regularly to ensure that batches are being processed correctly.

Batch locks can be manually removed in the OnBase Client by selecting **Admin** | **Utilities** | **Batch Lock Administration**.

Maintain/Clean Up Data Backup Areas

If the process format is backing up the data files prior to executing the EDI 835 process or if there is a manual process to copy the data files before running the EDI 835 process, verify that the backup storage area is being cleaned and not running out of space.

System Interaction

Security

There are several levels of security required for EDI 835. The first is network security. The EDI 835 processing workstation must be logged onto the network as a user that has **Write access** to the storage location. If the documents in a batch will be retrieved, **Read access** is necessary. In order to purge a batch, **Delete rights** are required.

Additionally, the processing workstation will need **Read / Write / Delete access** to the temporary parse path and the temporary report path for the process to complete successfully.

OnBase security has several levels, depending on the function of the user. To configure or run a process, or work with batches imported via a process, users must belong to a User Group with the proper rights and privileges.

Application Enabler

Application Enabler allows users to access documents imported into OnBase via EDI 835 from a third-party, line-of-business application. For example, from their LOB application, a user can double-click on a customer's account number to retrieve all of the customer's billing statements stored in OnBase.

Digital Signatures

Documents imported into OnBase via EDI 835 can have a digital signature applied to them by a user. This signature is unique to the user applying it and verifies that the document has not been modified since the user applied the digital signature.

Document Distribution

EDI 835 documents can be used as the basis for a Document Distribution process. Because the distribution process functions with Image Statement generation, the Document Distribution module begins in the EDI 835 queue. Statements can then be sent to customers via e-mail, web presentation, fax, or publishing.

Document Retention

Documents imported into OnBase via EDI 835 are treated like all other documents in regards to Document Retention. The removal process deletes all information about the document from OnBase based on static or dynamic criteria. However, due to the nature of EDI 835 processing, files stored in the OnBase Disk Groups may contain multiple documents, not all of which are slated for removal. Because of this, these files cannot be removed from the Disk Group until all documents from the files have also been deleted from OnBase.

Exception Reports

Documents imported into OnBase via EDI 835 can be used with Exception Reports. This process verifies that each document imported into OnBase via EDI 835 belonging to a specific Document Type has a related document belonging to another Document Type. This module can also determine which documents are a match based on Keyword criteria. Documents imported into OnBase via EDI 835 may also be the documents that are sought out based on a primary document.

Exporting / Publishing

Documents imported into OnBase via EDI 835 can be part of an export or publishing process. These documents can be added to the exported or published copies of OnBase, and these documents can then be imported into another OnBase system or retrieved from the RunTime Client.

Host Enabler

Host Enabler allows users to cross-reference information on the host screen with documents imported into OnBase via EDI 835. This allows users to retrieve documents from Keyword Values displayed on the viewed host screen. For example, a user could double-click on an account number from the host screen to retrieve documents stored in OnBase indexed with that account number as a Keyword Value.

Print Distribution

Documents imported into OnBase via EDI 835 can be scheduled to print based upon print distribution criteria, allowing users to print reports on a regular basis.

Web Server

Documents imported into OnBase via EDI 835 can be retrieved via a web browser using OnBase's Web Server and have many of the same options as when retrieved and viewed in the OnBase Client, such as viewing Keyword Values.

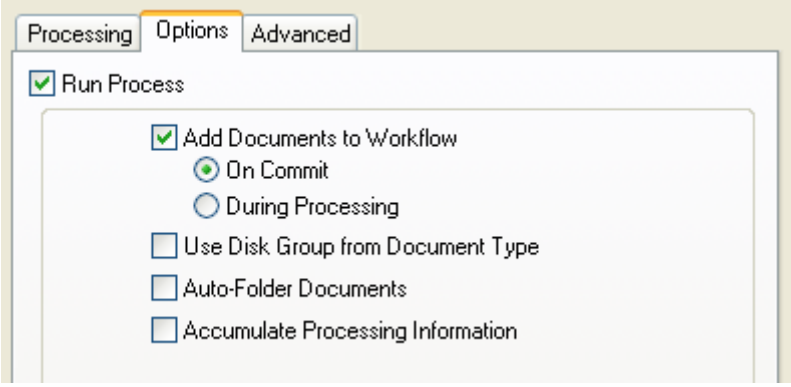
Note: These documents are converted to TIFF format for viewing at the workstation.

Workflow

Documents that are imported via EDI 835 can be added to a Workflow process. The Workflow process that the document enters is determined by the Life Cycle(s) assigned to the Document Type. To add a document to a Life Cycle, from the OnBase Configuration module, select **Document | Document Types**, and then click **Lifecycles**.

Additionally, the EDI 835 process must be configured to either add the documents to Workflow either after processing or when the batch is committed. The point at which documents enter the Workflow is configured on the Options tab of the **Processing Settings for: <Process Name>** dialog box.

Select the **Add Documents to Workflow** check box and the radio button that corresponds to the time when you would like the documents to enter Workflow.



Document Types that are not assigned to a Life Cycle are not affected by this option.

Note: Be aware that if any additional processing or tasks that are configured to occur when the documents are added to the Life Cycle, the processing workstation will take on this workload if the **During Processing** option is selected. If the **On Commit** option is selected, the workstation that commits the batch is responsible for this workload.

The Importance of Verification Reports

What is a Verification Report?

Verification Reports are available for all processing modules. They provide valuable information to users about a process that imports documents into OnBase, including:

- Any errors encountered during processing.
- The number of documents and pages processed into OnBase.
- The names of the file(s) processed.
- The total processing time.
- The average processing time per document.

- The average processing time per page.
- The date and time the process was run.
- The process format used.
- The processing options selected for the process (e.g., **Store Documents Indices**, **Store Document Data Files**, and **Test Only**).
- The process's Default Document Date.
- The process's Internal Batch Number.
- The path to the import file, the number of entries found and the size of the file.
- The number of files processed.

Why Incorporate Verification Reports into the Processing Procedure?

The Verification Report should be viewed as part of the processing procedure. Regardless of whether a process is manually initiated or automatically run and committed, each processed batch should undergo a quality assurance check using the Verification Report. By viewing the Verification Report for each process, problematic configurations can be identified and corrected, and you can ensure that documents are being processed into OnBase accurately and efficiently.

When Verification Reports are reviewed regularly, configuration problems can be identified and resolved before a large number of processes have been performed using the same erroneous configuration.

If Verification Reports are not reviewed consistently, users may assume that documents have been correctly imported into OnBase when they have not. Errors can be easily and quickly detected that may have otherwise not been caught.

What Can a Verification Report Identify?

One of the most valuable reasons to view a Verification Report is to ensure that all documents imported into OnBase via the process were processed correctly.

By comparing the number of documents that were actually imported into OnBase to the number of documents that were expected to have been imported, to ensure that no documents were lost, mishandled or misidentified. If the two numbers do not match, the process format configuration should be examined for accuracy and the import file should be checked for errors, such as scrambled or corrupt data.

The Verification Report also provides information about any errors encountered during processing. These errors could be due to improper or out-of-date configuration information or an incorrect path to the import files.

Errors Concerning Keywords

Verification Reports can help you detect if Keyword Types configured for a process or Keyword Values identified by process are valid.

Warning: Invalid Keyword Amount: '5,123.00'

This error indicates that the currency format for the **Amount** Keyword Type was not configured correctly. To fix this error, modify the process format's configuration so that the currency Keyword Type is correctly formatted.

The following record cannot be archived, errors in required field below.

This error identifies that there is an issue with the process format's configuration and helps you identify the area of the configuration that needs to be reviewed.

Warning: Keyword <Keyword Type> (<Keyword Number>) is too long and will be truncated from <Keyword Value> to <Truncated Keyword Value>.

This error indicates that the Keyword Value identified by the EDI 835 processor exceeds the maximum Keyword Value length of the Keyword Type to which it belongs.

For example, if the **a** Keyword Type was configured to have a maximum length of 3 characters and the Keyword Value identified by the EDI 835 processor was **abcdefg**, then the Keyword Value would be truncated to **abc** when imported into OnBase.

By viewing the Verification Report, this error can be detected and corrected.

Errors Concerning Identifying Documents

Verification Reports can record when documents cannot be identified from an import file.

The process format did not contain any recognizable documents.

This error indicates that the process did not identify any documents; therefore, no documents were imported into OnBase. This is an indication that the process format's configuration needs to be reviewed.

Inaccurate Number of Documents and Pages

The Verification Report lists the number of documents and the number of pages within those documents that were successfully imported into OnBase. By comparing the actual number of documents and pages processed into OnBase with the expected number of documents and pages, users can ensure that the documents are being imported into OnBase accurately.

How Do You Access a Verification Report?

You can view a Verification Report in two ways:

- From its associated in a processing queue.
- From the Document Search Results list.

Opening a Verification Report from a Batch

There are two ways to access a Verification Report from a batch:

Method 1

1. From the OnBase Client, click **Processing | Processor Name**.
2. Select a queue, such as **Awaiting Commit** or **Committed**.

3. Double-click on the appropriate batch to display a list of the items that it contains.
4. Double-click the **SYS Verification Reports** document. The Verification Report is displayed.

Method 2

1. From the OnBase Client, click **Processing | Processor Name**.
2. Select a queue, such as **Awaiting Commit** or **Committed**.
3. Right-click the appropriate batch and select **View Verification Report**. The Verification Report is displayed.

Opening a Verification Report from the Document Search Results List

1. In the Client module, select **File | Open | Retrieve Document**.
2. Select the **System Documents** Document Type Group.
3. Select the **SYS Verification Reports** Document Type.
4. If you know exactly which Verification Report you are looking for, enter a value for the **Description** Keyword Type.

   If you do not know which Verification Report you are looking for, leave the **Description** Keyword Type field empty.
5. Click **Find**. The **Document Search Results** list is displayed.
6. Double-click on the appropriate Verification Report from the **Document Search Results** list. The Verification Report is displayed.

Can a Verification Report be Added to a Workflow Life Cycle?

A Verification Report can be routed through a Workflow Life Cycle.

In order for a Verification Report to be automatically added to a Life Cycle upon its creation, the **SYS - Verification Reports** Document Type needs to be assigned to the appropriate Life Cycle.

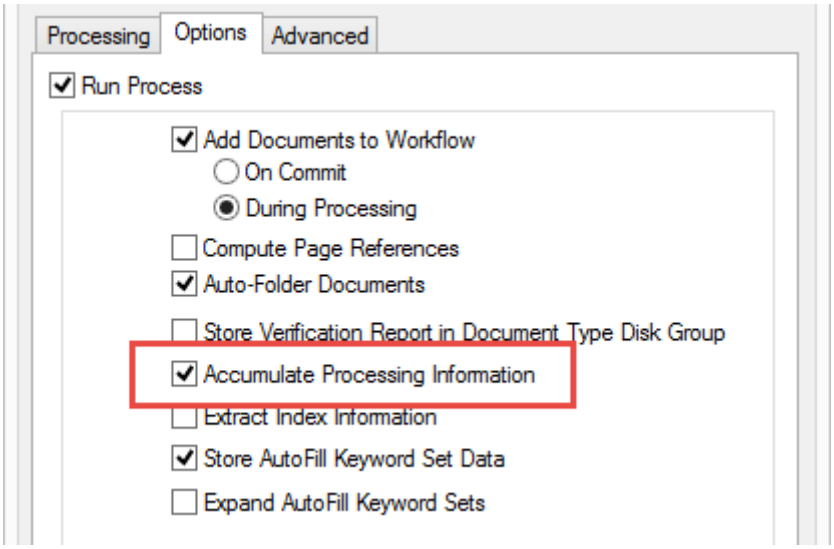
Can Multiple Processes be Added to a Single Verification Report?

You can configure your OnBase solution to generate a Daily Report which consists of Verification Reports from multiple processes. This report combines the Verification Reports all of the processes that are assigned the **Accumulate Processing Information** option and presents them in a single document, allowing administrators to view a single report to check all batches for the day.

Note: In order for this menu option to be displayed, at least one process format must be configured to use the **Accumulate Processing Information** option and at least one Daily Report must exist in your OnBase solution. In addition, you must have the correct Product Rights for the EDI 835 process.

To include a process in the Daily Report:

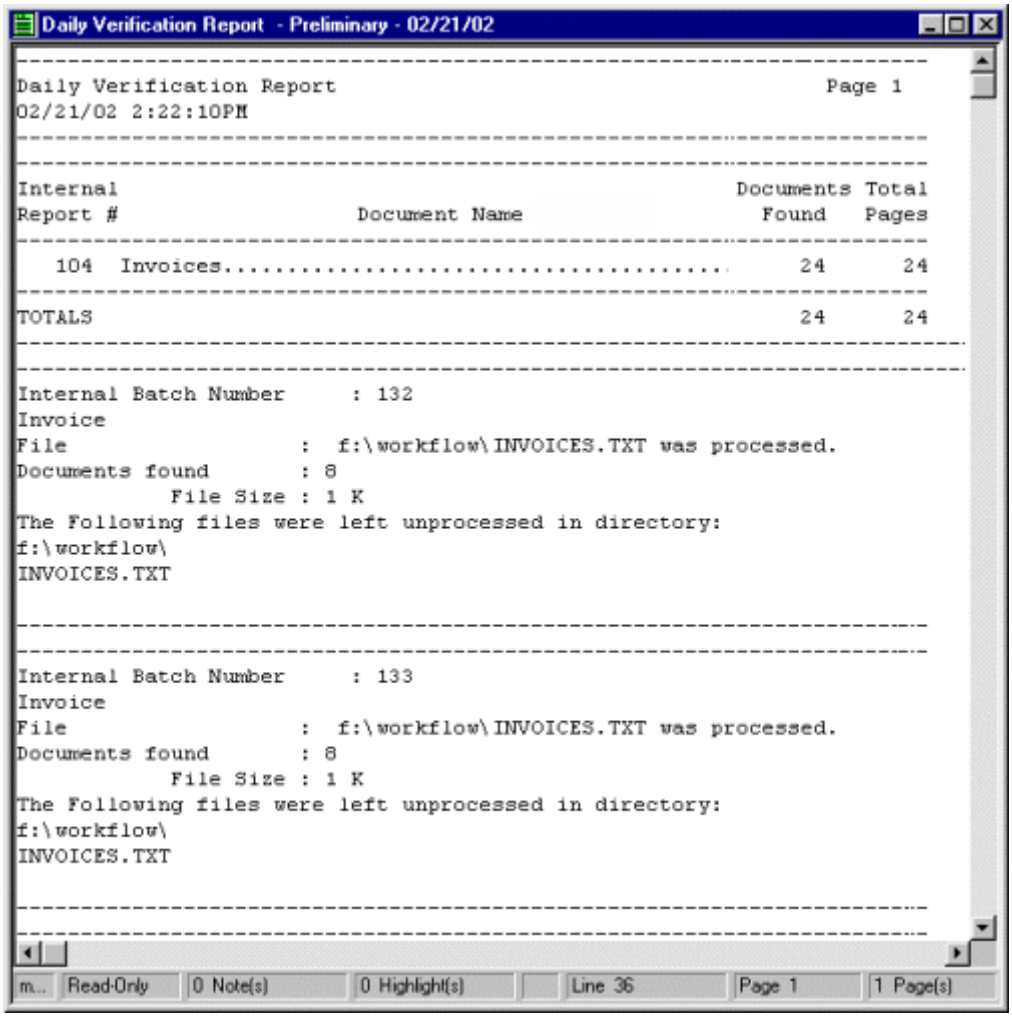
1. In OnBase Configuration, select **Import | COLD/ERM Processor**.
   The **COLD Processor Configuration** dialog box is displayed.
2. Select a process and click **Settings**.
   The **Process Settings** dialog box is displayed.
3. In the **Options** tab, select **Accumulate Processing Information**.



4. Click **Save**.

To view the Daily Report in the OnBase Client, select **Processing | View Daily Report**.

The **Daily Verification Report** window is displayed.



This details all Document Types that were searched for as well as the total number of documents found up to the time when the report was generated. Each batch also gets an entry detailing the files processed and the number of documents residing in each. If an error occurred, it would appear in the batch's section.

The report is marked as preliminary. When the report is purged, it will be saved as a final Verification Report.

1. To purge the Daily Report, select **Processing | Clear Daily Report** from the menu bar in the Client module. The **Clear Daily Verification statistics from the database?** prompt is displayed.
2. Click **Yes**. Any new processing that is performed after the report is cleared is contained in the new Daily Report.

Note: In order for this menu option to be displayed, at least one process format must be configured to use the **Accumulate Processing Information** option and at least one Daily Report must exist in your OnBase solution.