OnBase®
Foundation EP5

Report Capture

Reference Guide

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Foundation EP5

Copyright

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Department/Group ..... Documentation

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Overview

The OnBase Report Capture module allows customers to use OnBase as a long-term repository for Meditech reports, as well as helping reduce the manual effort required when compiling reports that exist in Meditech.

Report Capture allows Meditech users to print Medical Record Forms and Non-Procedural Reports directly into OnBase from their Meditech system. OnBase users can also submit an E-Form or Unity Form to initiate a Report Capture process. Documents printed to OnBase are automatically indexed with the relevant **Medical Record Number** and **Account Number**, and can be configured to use these values to trigger an AutoFill Keyword Set to automatically index the document with additional related Keyword Values. In environments with multiple medical facilities or Meditech systems, facilities can be mapped to specific Meditech systems to ensure that the correct settings are used for a specific system.

Meditech Systems

The Report Capture module works in conjunction with both Meditech Magic and Meditech 6.0 systems.

For information that applies to Meditech Magic, see the following topics:

- Installation With Meditech Magic on page 27
- Configuration With Meditech Magic on page 51
- Usage With Meditech Magic on page 94

For information that applies to Meditech 6.0, see the following topics:

- Installation With Meditech 6.0 on page 106
- Configuration With Meditech 6.0 on page 154
- Usage With Meditech 6.0 on page 193

Licensing

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

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 2.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 2.

Simplified Licensing

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

Legacy Licensing

In order to use the Report Capture solution, the **Report Capture** license is required.

E-Forms/Unity Forms

If your system is licensed for E-Forms or Unity Forms, you can create a form to submit and track Report Capture requests using Workflow. The created form should include the **Account Number** and **Medical Record Number** Keyword Types so that Workflow can use these values to correctly route the document. For more information on creating forms, see the E-Forms or Unity Forms documentation.

Workflow

If your system is licensed for Workflow, you can make use of the Workflow interface within OnBase Studio to submit a Report Capture request directly from OnBase. The following sections cover the Workflow rules and actions specific to Report Capture - for more general information on configuring your Workflow solution, see the **Workflow** module reference guide.

Submit Report Capture Request Action

The Submit Report Capture Batch Workflow action allows you to submit a Report Capture request for a single account number based on an associated Workflow document.

Option: Report Capture Properties

In the **Report Capture Properties** section, you must specify the OnBase Keyword Types that contain the values needed to execute the Report Capture request:

Report Capture Properties	Description
Account Number	Select the Keyword Type you have configured to store Meditech **Account Numbers**. See the OnBase for Meditech documentation for more information on the configuration of this Keyword Type.
Medical Record Number	Select the Keyword Type you have configured to store **Medical Record Numbers**. See the OnBase for Meditech documentation for more information on the configuration of this Keyword Type.

Report Capture Properties	Description
Facility Name	If you want to ensure that requests are submitted for only a certain facility, select the Keyword Type you have configured to store facility names. **Note:** Configuring a Facility Name Keyword Type is not required; however, when the Facility Name Keyword Type is configured, the Facility Name Keyword Type is a required Keyword for any requests using this action.
Batch ID	Select the Keyword Type you have configured to store the Batch ID or Batch Number of your form. The Batch ID is used to identify and track the form within OnBase as it passes through Workflow.

Option: Report Capture Document Types

In the **Report Capture Document Types** section, select the OnBase Document Type(s) that are mapped to the Meditech Form Type(s) you want to print to OnBase, then **Add** them to the **Selected Document list**.

Submit Report Capture Batch for Inpatients Action

This action allows for the creation of a new Report Capture batch for inpatients with various admission types. It allows you to specify the admit type for the inpatients as well as the corresponding Document Types for the batch.

Note: This action is not supported in the OnBase Client Classic Workflow interface.

Option: Report Capture Properties

Configure the following Keyword Types:

- **Inpatient Admit Type Keyword Type -** From the drop-down list, choose the Keyword Type that stores the admission type of the patient. They Keyword Type can contain and admission type name or ID.
- **Printer Name Keyword Type** - From the drop-down list, choose the Keyword Type that stores the printer name. This setting is optional. When this setting is configured, the **Facility Name Keyword Type** setting is also required.
- **Facility Name Keyword Type** - If your solution includes multiple facilities, select the Keyword Type that stores the facility name or facility ID number. This setting is optional unless the **Printer Name Keyword Type** setting is configured.
- **Batch ID Keyword Type** - From the drop-down list, choose the Keyword Type that stores the batch ID number.

Option: Report Capture Document Types

From the **Available Document Types** drop-down list, choose a Document Type that has the configured Keyword Types assigned to it, then click **Add**. As a Document Type is added, it appears in the **Selected Document Types** list. To remove a Document Type from this list, select it, then click **Remove**.

Document Types must be mapped to the report types you want to include in the batch.

Cancel Report Capture Batch Action

This action cancels Report Capture requests.

Option: Batch ID

From the **Batch ID** drop-down list, select the Keyword in which the batch ID is stored on requests.

Check External Report Capture Status Rule

The Check External Report Capture Status rule allows you to verify the success or failure of a submitted Report Capture request.

Option: Batch ID

Select the Keyword Type you have configured to store the Batch ID or Batch Number of your form. The Batch ID is used to identify and track the form within OnBase as it passes through Workflow.

Option: Report Capture Batch Status to Check

Select the status value you will be checking for:

- **InProcess** - select this status to check if the selected Report Capture request in currently in progress
- **Failed** - select this status to check if the selected Report Capture request has failed
- **Canceled** - select this status to check if the selected Report Capture request has been canceled
- **Complete** - select this status to check if the selected Report Capture request was successfully completed

Release of Information

If your system is licensed for Release of Information (ROI), from an open request, you can retrieve documents from Meditech through your Report Capture external system configuration. The documents are then attached to the request. For more information on the ROI settings that control this functionality, see the Release of Information documentation.

Note: This information pertains to the Release of Information module, which is used in conjunction with the Medical Records Unity Client. It does not apply to Medical Records Release of Information or Medical Records Release of Information (Standalone).

Reporting Dashboards

Note: The **Reporting Dashboards** database license is required.

Report Capture can be used with Reporting Dashboards for OnBase. Reporting Dashboards allows you to graphically display data returned from a data provider. Report Capture can be configured as one such data provider. The below sections cover how to configure Reporting Dashboards for use with Report Capture. For more information on additional Reporting Dashboards functionality, refer to the Reporting Dashboards module reference guide or help files.

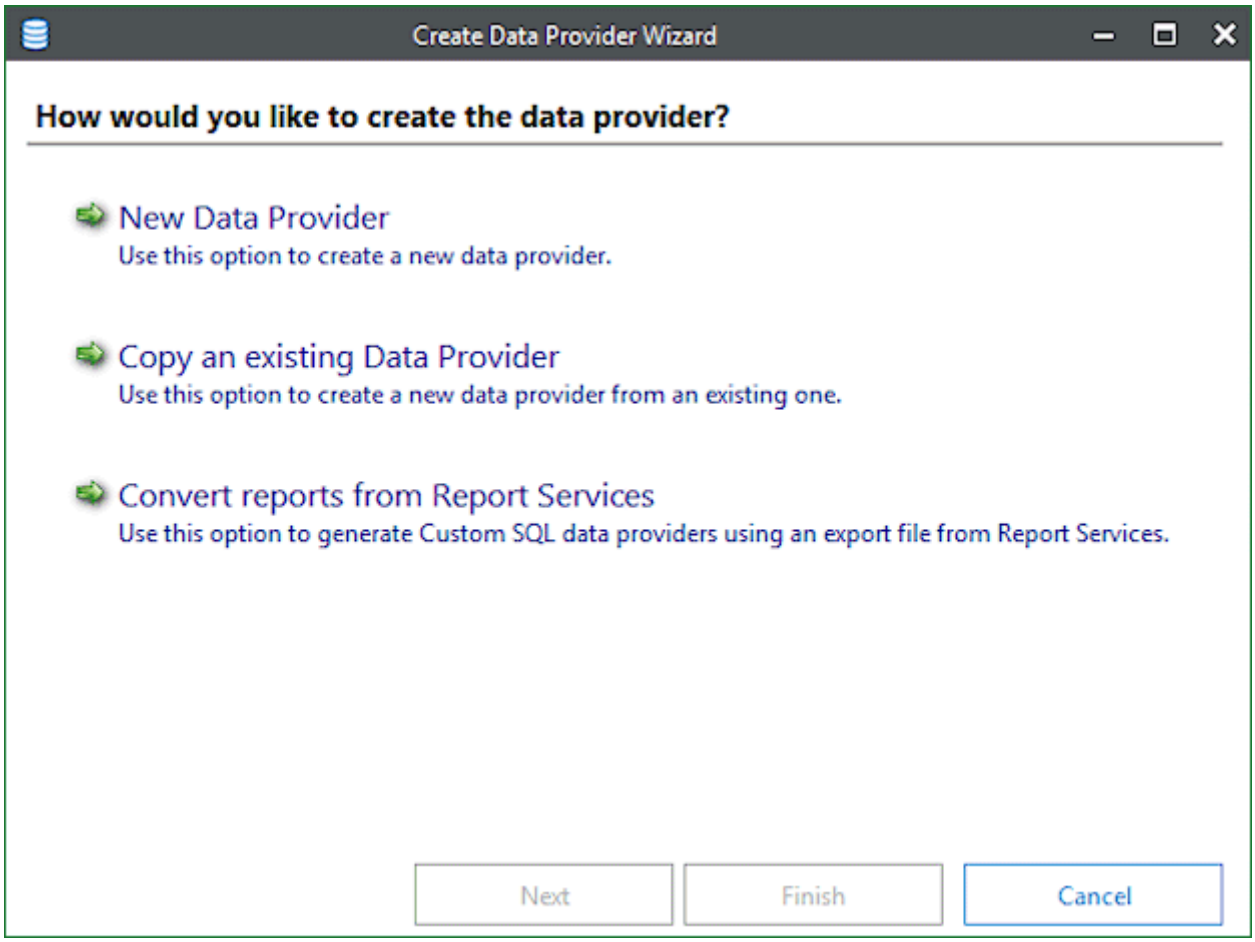
Report Capture Administration Data Provider

The **Report Capture Administration** data provider returns data on Report Capture errors, purged documents, and auditing.

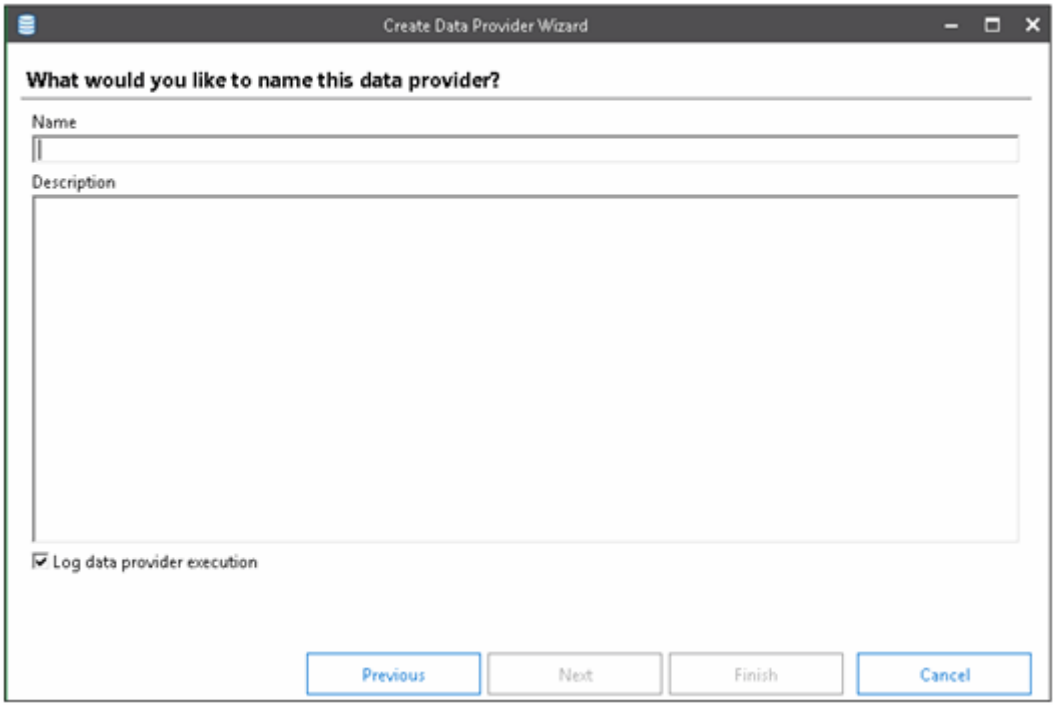
The **Create Data Provider Wizard** is used to create new data providers. To create a new data provider:

1. From the Dashboard Viewer, click **Administration** from the bottom of the Dashboard Gallery screen, and then click the **Create new Data Provider** button from the **Data Provider Administration** ribbon of the Unity Client:

2. At the **How would you like to create the data provider?** page:
   - Click **Create new Data Provider** to create a completely new data provider.
   - Click **Copy an existing Data Provider** to use an existing data provider as the template for a new data provider. The process is the same as creating a completely new data provider except the options are pre-configured with the information from the data provider that was copied. The pre-configured options can be changed or edited to reflect the requirements of the new data provider, unless otherwise noted.
   - Click **Convert reports from Report Services** to use an export file from Report Services to create a custom SQL data provider.



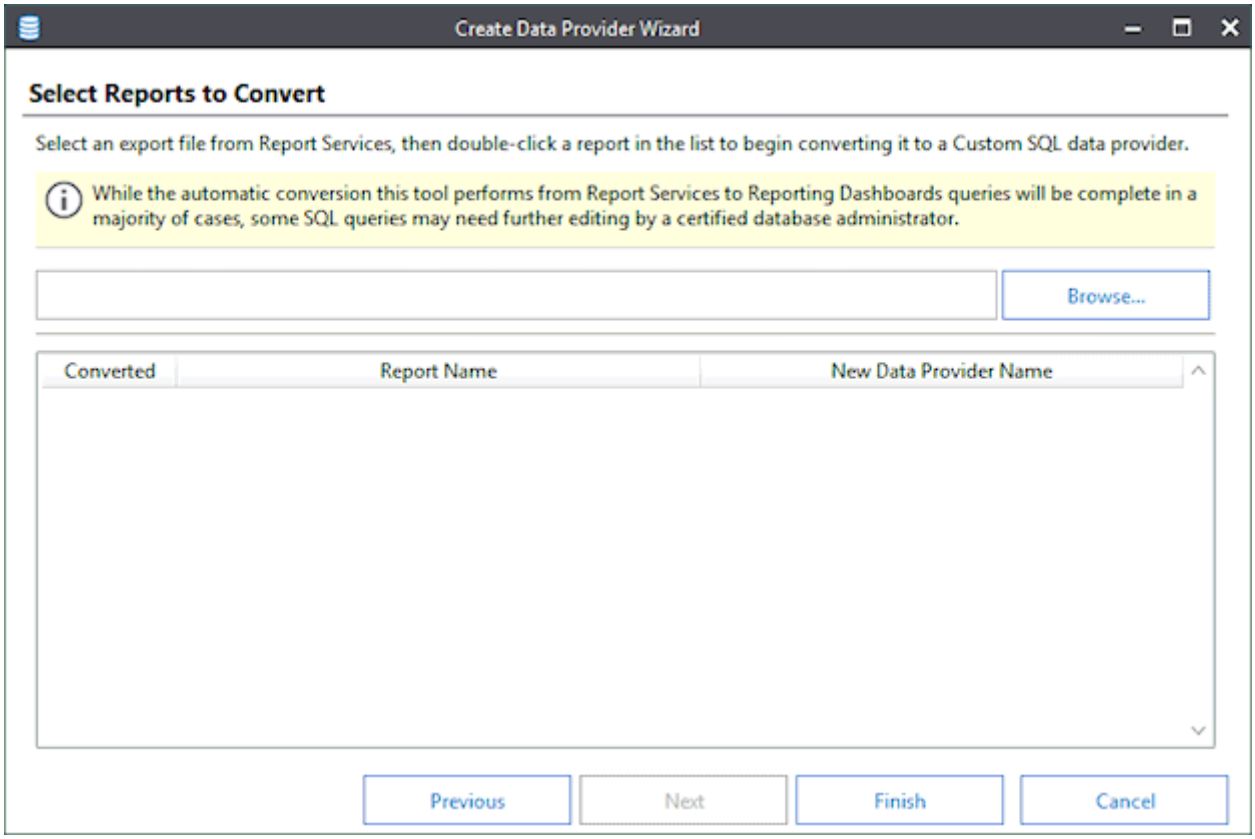
3. If you clicked **Create new Data Provider**, the **What would you like to name this data provider?** page is displayed.



If you clicked **Copy an existing Data Provider**, the **Select the data provider to copy from** page is displayed. You can search for a data provider to copy by typing the name of the data provider into the **Search** bar in this page. Select the data provider to copy, then click **Next**. The **What would you like to name this data provider?** page is displayed.

Note: When a data provider is copied, the options in the remaining pages are pre-configured with the information from the data provider that was copied. Unless otherwise noted, the pre-configured options can be changed or edited to reflect the requirements of the new data provider.

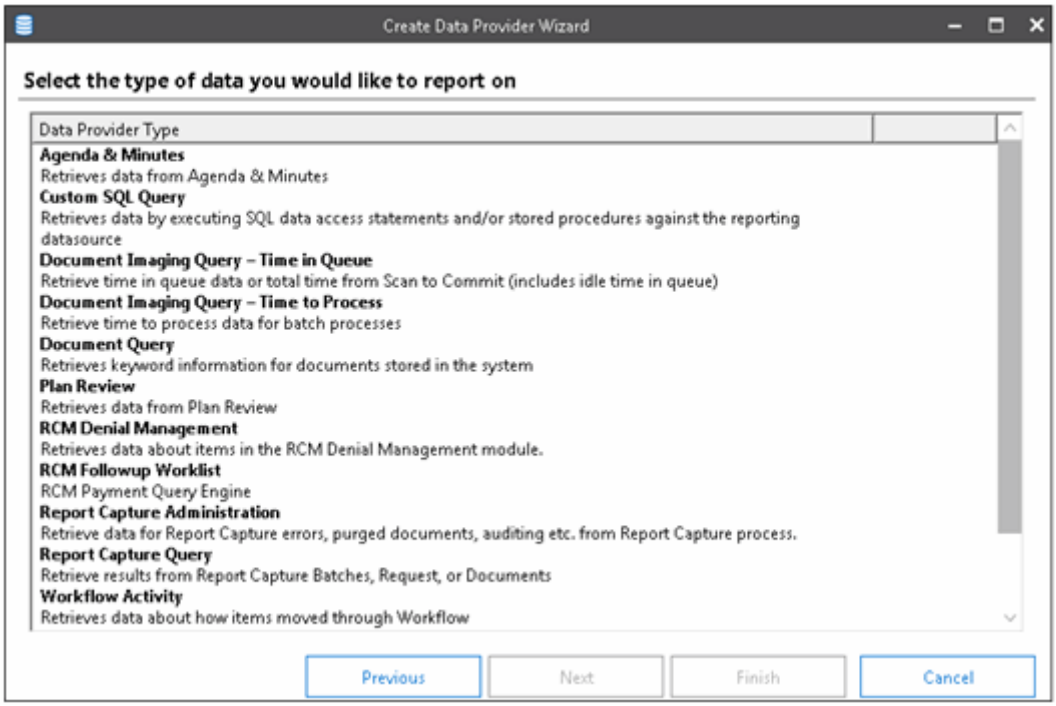
if you clicked **Convert reports from Report Services**, the **Select Reports to Convert** page is displayed. Click **Browse** to select a Report Services export file (**.xml**) to import. The file is imported as a Custom SQL data provider. Multiple Report Services export files can be added on this screen.



To edit the details of each individual import, double-click on the file in the list. The **What would you like to name this data provider?** page is displayed.

4. Type a name for the data provider in the **Name** field. The name should be unique and allow the data provider to be easily distinguished from other data providers.
5. Type a brief description of the data provider in the **Description** field. The description should briefly explain what the data provider is and what type of data a user can expect to retrieve from it.
6. Select **Log data provider execution** to include the elapsed time of data retrieval and runtime parameter information for this data provider in the **History** log. Data requests for the data provider are always logged in the history even if this option is deselected.
7. Click **Next**. Unless you are converting data from Report Services, the **Select the type of data you would like to report on** page is displayed. If you are converting data from Report Services, the **Edit SQL query** page is displayed.

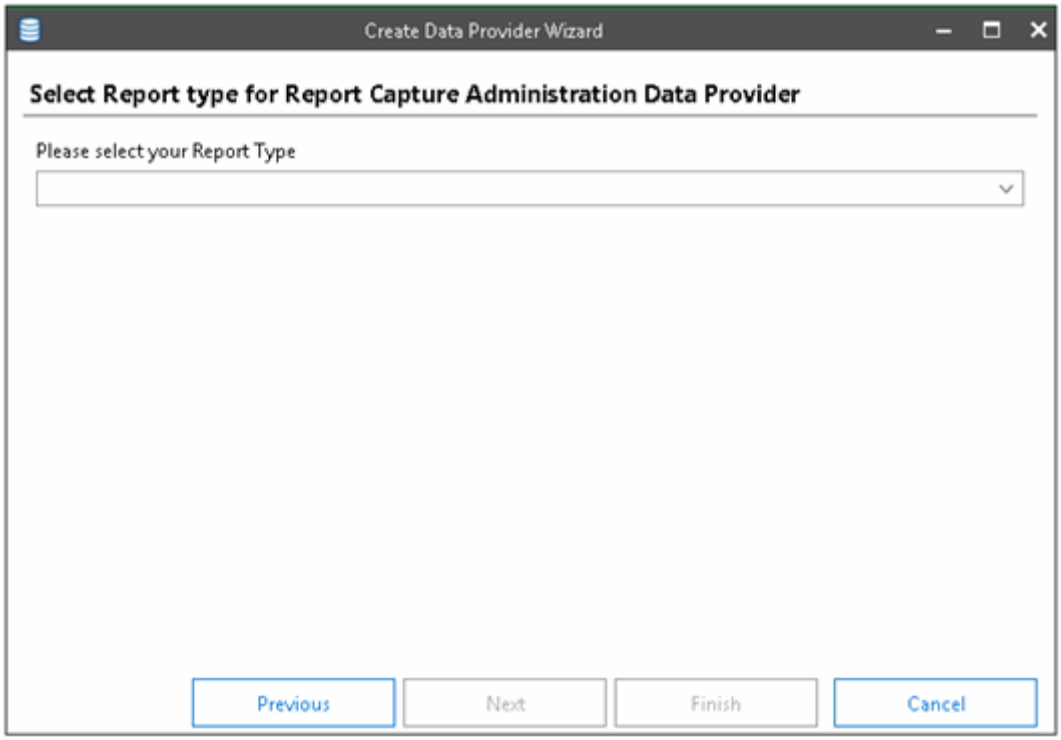
Note: If you copied an existing data provider this page is not displayed. You cannot change the data provider type for copied data providers.



Note: The data providers available depend on the modules licensed for your system. The **Custom SQL Query** and **Document Query** data provider types are available to all systems with Reporting Dashboards.

8. Select **Report Capture Administration**.

9. Click **Next**. The **Select Report type for Report Capture Administration data provide**r dialog box is displayed.



Select the Report Type you would like to generate. Select either **Report of Errors** or **Report of Purged Batches**.

10. Click **Next**. Depending on your selection, either the **Provide values for Report Of Errors Configuration** or the **Provide vales for Report of Purged Batches configuration** dialog is displayed.

If you selected Report of Errors:

- Select **Prompt users to enter batch number at runtime** to require users to enter a specific batch number to report upon.
- Select **All Errors** to report on all errors.
  - Select **Get Errors by Date Range** to retrieve errors that occurred during a specific date range.

Note: Click **Next** to specify the date range.

  - Select **Prompt users to select date range at runtime** if you would like to allow users to input their own date range to report upon.

If you selected Report of Purged Documents:

- Select **Prompt users to enter batch number to get Purged Info** to require users to enter a specific batch number to report upon.

- Select **All Purged Batches** to report on all batches.
  - Select Include Purged Requests to include purged requests in the report.
  - Select Include Purged Documents to included purged documents in the report.
  - Select **Get Purged Info By Date Range** to specify a date range to report upon. Select **By Modified Date** or **By Created Date**.

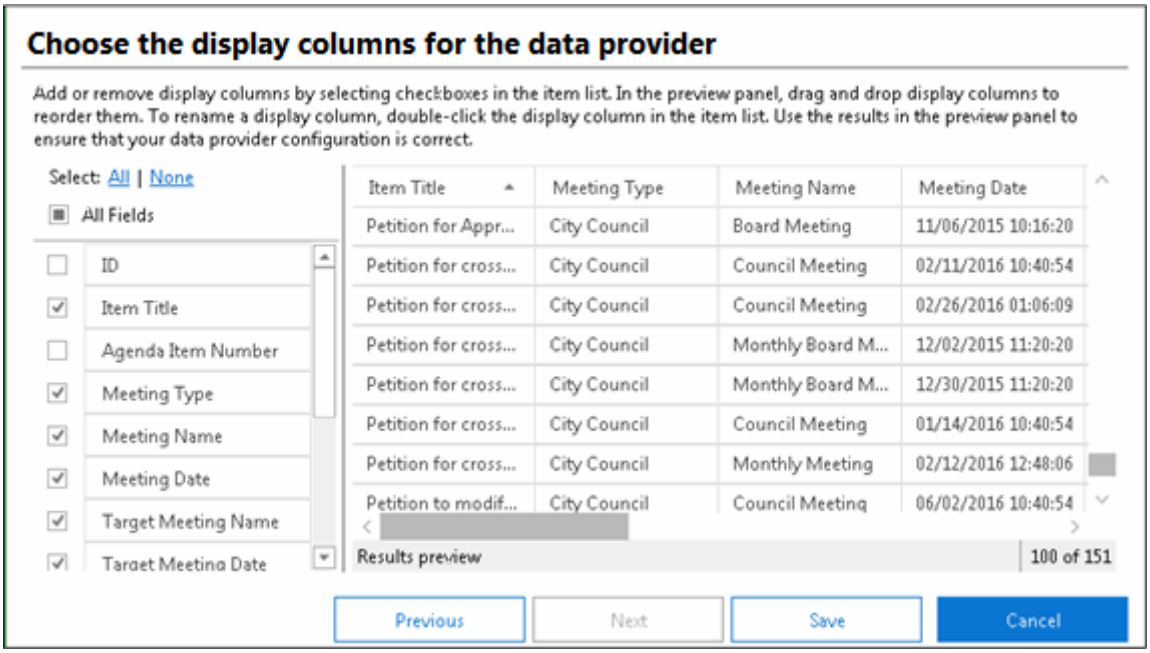
Note: Click **Next** to specify the date range.

  - Select **Prompt users to select date range at runtime** if you would like to allow users to input their own date range to report upon.

11. Click **Next**. The **Choose the display columns for the data provider** dialog box is displayed.

Note: If the **Restrict user input to select list values** option was selected in the **Edit SQL Parameter** dialog box, you are required to select a default value for the select list prior to selecting display columns for the data provider. Select a value from the drop-down select menu and click **Next**. The **Choose the display columns for the data provider** dialog box is displayed.

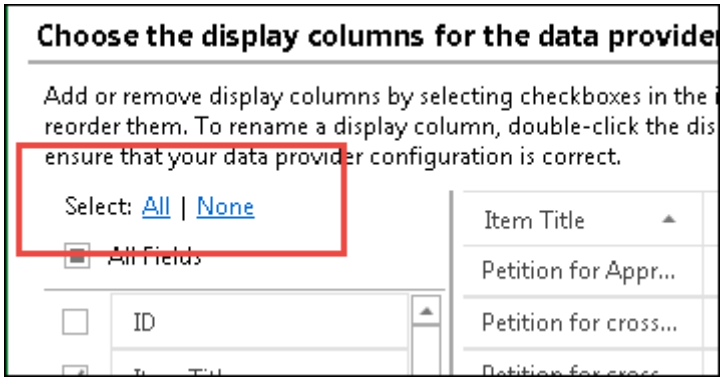
The display columns available depend on the data provider type being configured. If the data provider being configured allowed you to pre-select the display columns available, only the display columns selected earlier in the configuration process are available.



12. Select a display column to include it in the results, or deselect it to hide it.

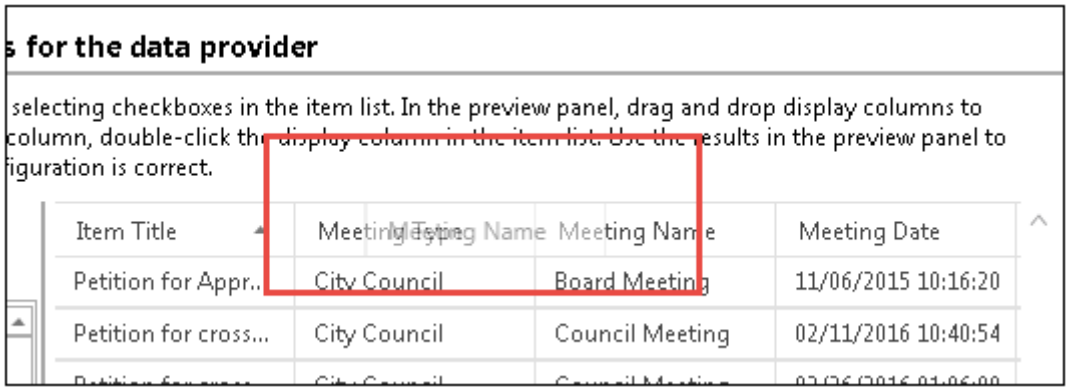
Note: In order for users to be able to open a document directly from a dashboard, the system Keyword Type **Document ID** must be included as a display column.

Click **None** to deselect all display columns or click **All** to select all display columns.



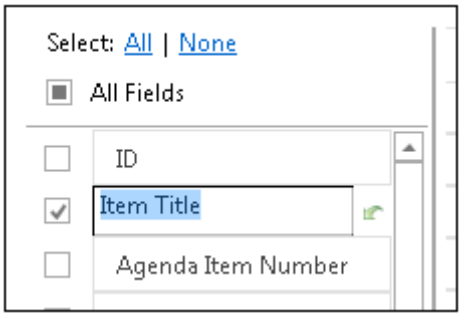
Tip: A preview of the type of data that is returned with the display columns selected is displayed in the preview pane at the right of the list of display columns. If the data returned is not acceptable, select different display columns or click **Previous** to reconfigure previous aspects of the data provider.

13. To reorder the display columns, drag-and-drop the column headings in the preview pane to put them in the desired order.

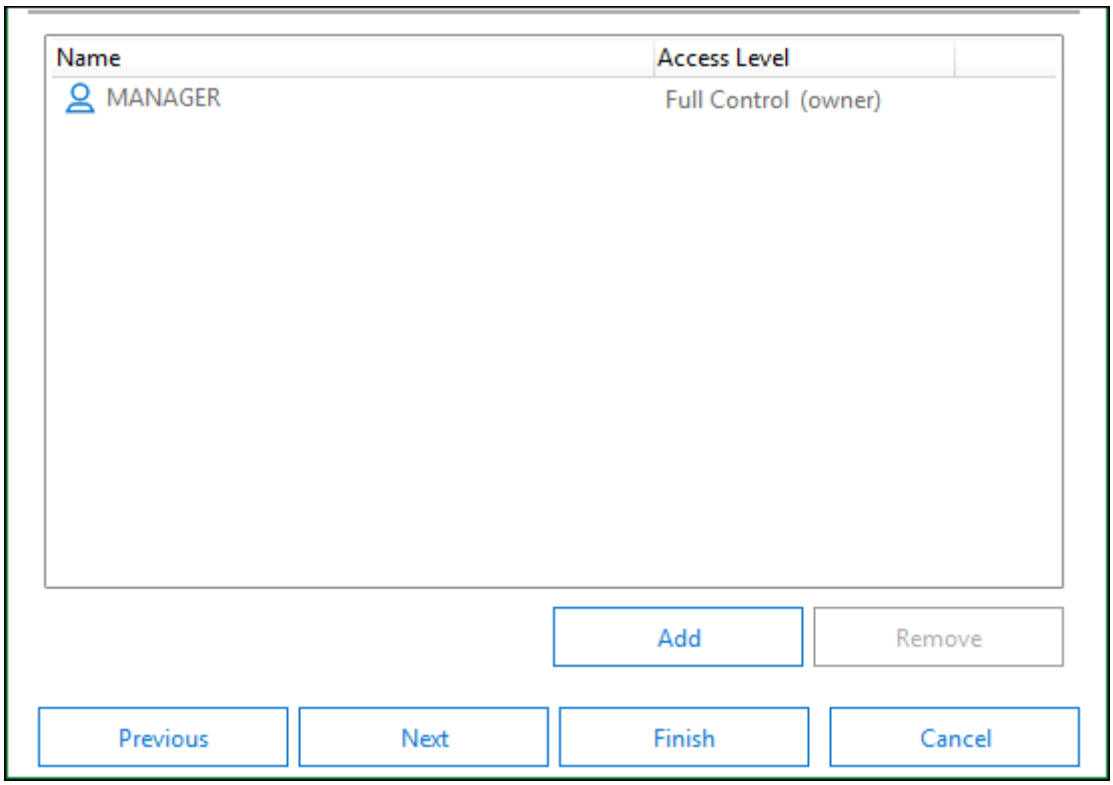


14. To rename a display column, double-click the name in the list, and type the new name in the field provided. Click anywhere outside the field to save the changes.

Note: Display column names must not be blank or end with a space.



15. Click **Next**. The **Who should have access to the data provider?** dialog box is displayed.



16. To grant access to a new user, click **Add**. The **Select Users** dialog box is displayed. Only users and users groups with access to Report Capture are listed.
17. Click **Next**. The **Summary** dialog box is displayed. Review the information in the main pane to confirm that the data provider is correctly configured. If not, click **Previous** to return to the various configuration dialog boxes so that changes can be made.
18. Click **Finish**. The data provider is saved and is available for use with dashboards.

Report Capture Query Data Provider

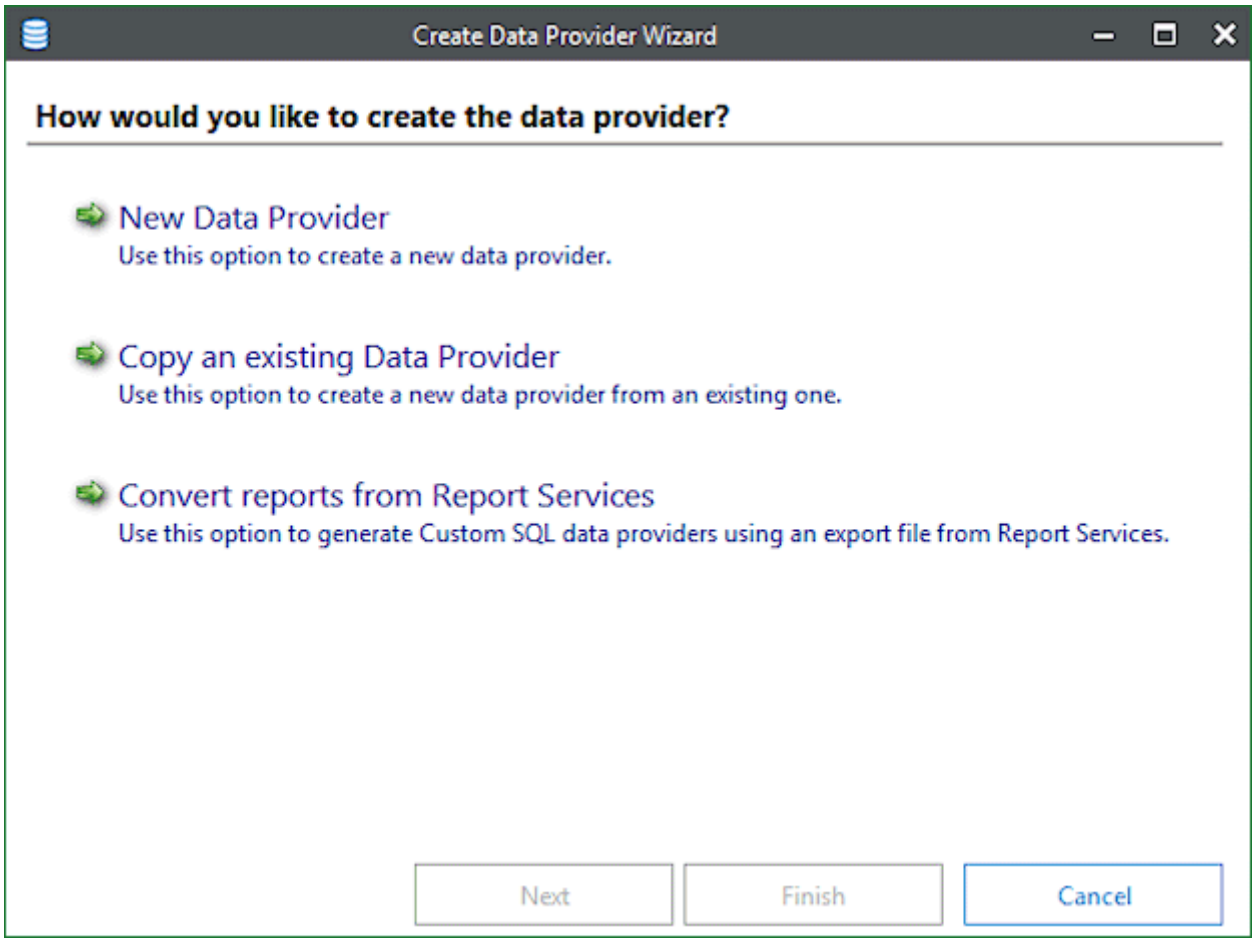
The **Report Capture Query** data provider returns data on the results of Report Capture batches, requests, and documents.

The **Create Data Provider Wizard** is used to create new data providers. To create a new data provider:

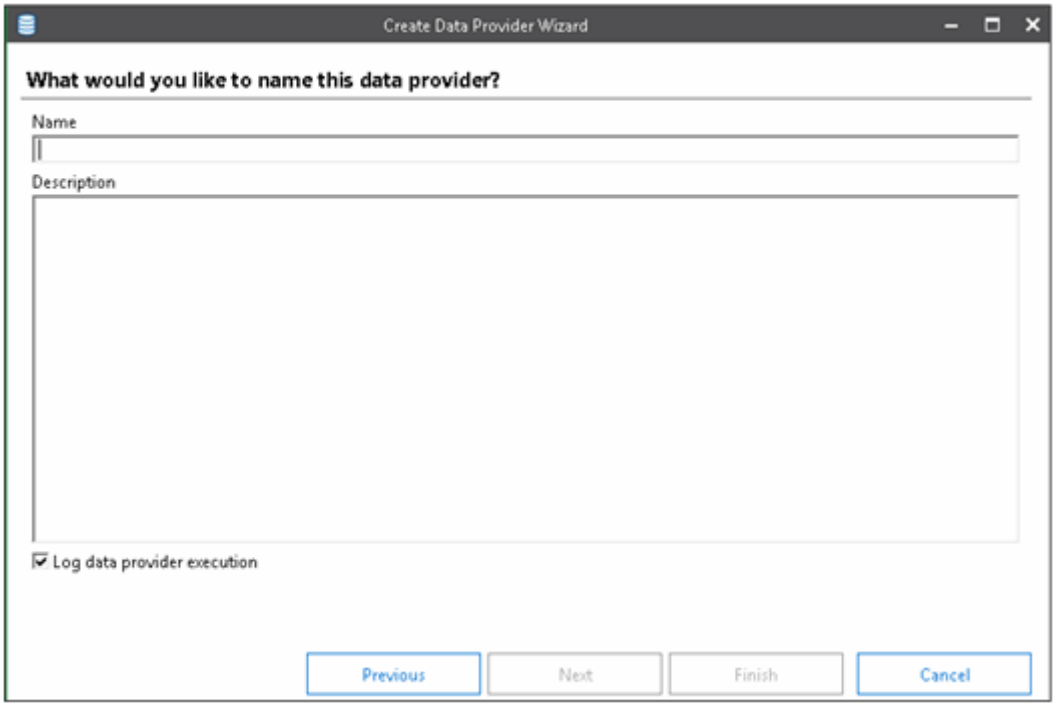
1. From the Dashboard Viewer, click **Administration** from the bottom of the Dashboard Gallery screen, and then click the **Create new Data Provider** button from the **Data Provider Administration** ribbon of the Unity Client:

2. At the **How would you like to create the data provider?** page:
   - Click **Create new Data Provider** to create a completely new data provider.
   - Click **Copy an existing Data Provider** to use an existing data provider as the template for a new data provider. The process is the same as creating a completely new data provider except the options are pre-configured with the information from the data provider that was copied. The pre-configured options can be changed or edited to reflect the requirements of the new data provider, unless otherwise noted.

- Click **Convert reports from Report Services** to use an export file from Report Services to create a custom SQL data provider.



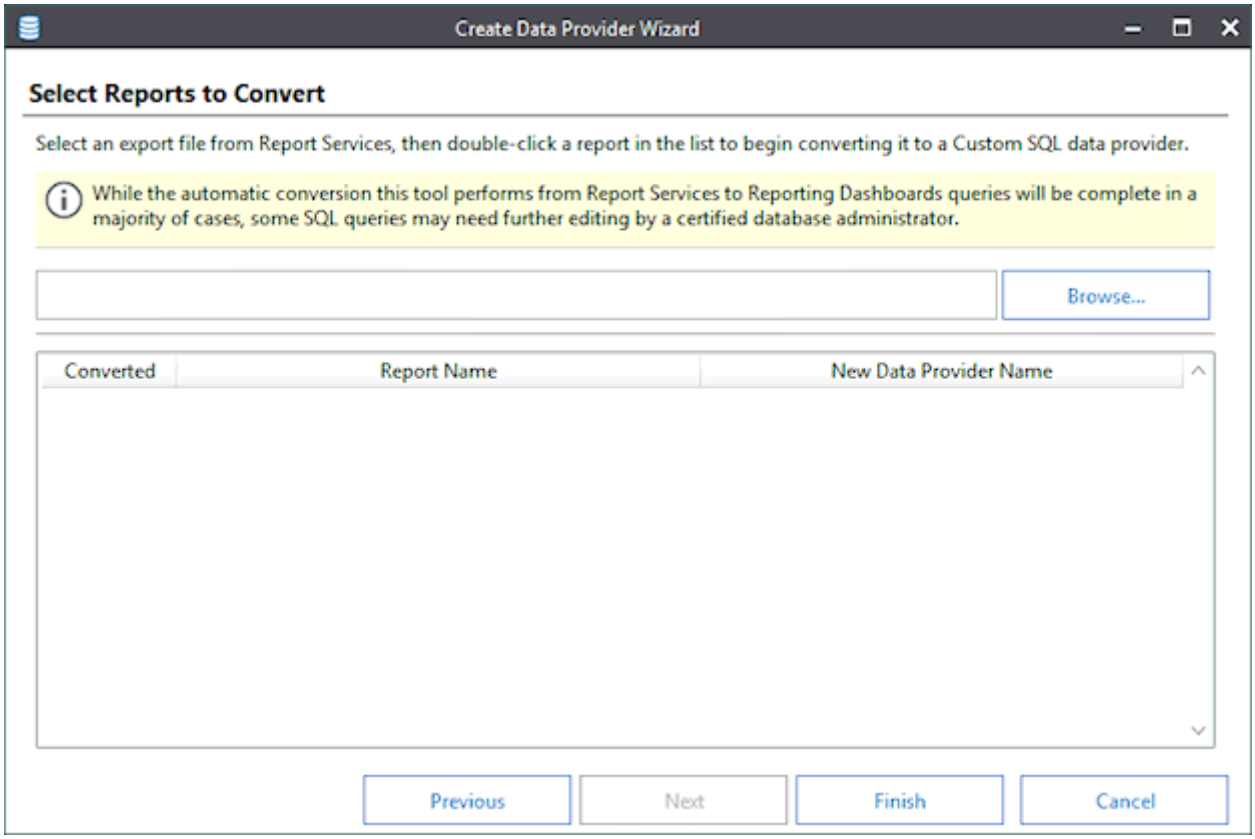
3. If you clicked **Create new Data Provider**, the **What would you like to name this data provider?** page is displayed.



If you clicked **Copy an existing Data Provider**, the **Select the data provider to copy from** page is displayed. You can search for a data provider to copy by typing the name of the data provider into the **Search** bar in this page. Select the data provider to copy, then click **Next**. The **What would you like to name this data provider?** page is displayed.

Note: When a data provider is copied, the options in the remaining pages are pre-configured with the information from the data provider that was copied. Unless otherwise noted, the pre-configured options can be changed or edited to reflect the requirements of the new data provider.

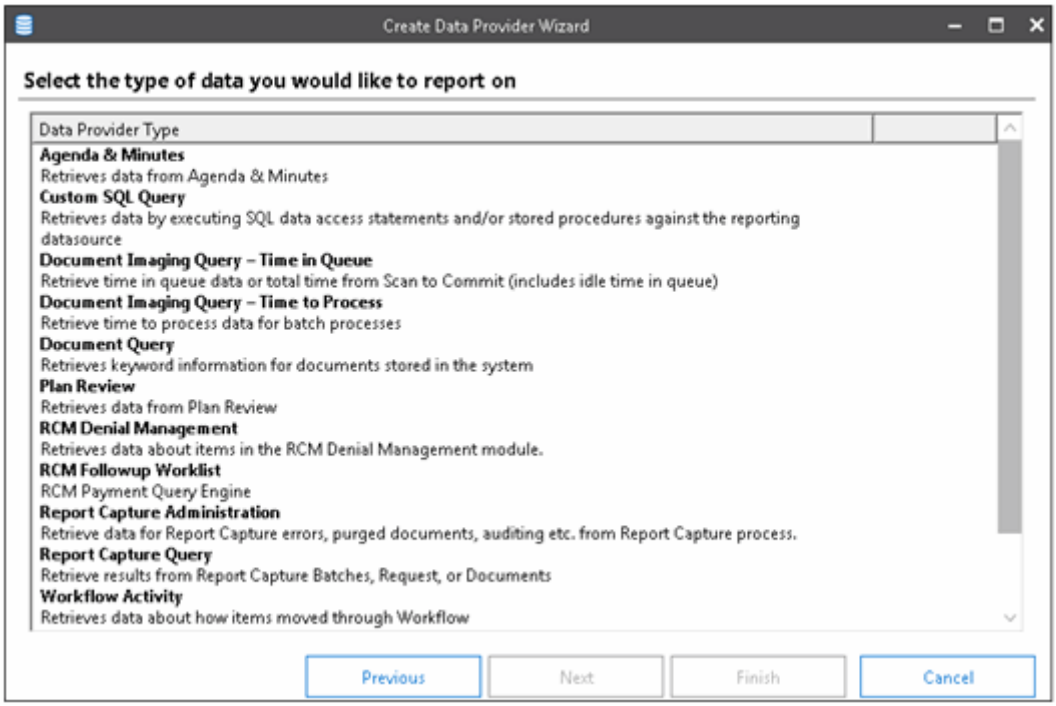
if you clicked **Convert reports from Report Services**, the **Select Reports to Convert** page is displayed. Click **Browse** to select a Report Services export file (**.xml**) to import. The file is imported as a Custom SQL data provider. Multiple Report Services export files can be added on this screen.



To edit the details of each individual import, double-click on the file in the list. The **What would you like to name this data provider?** page is displayed.

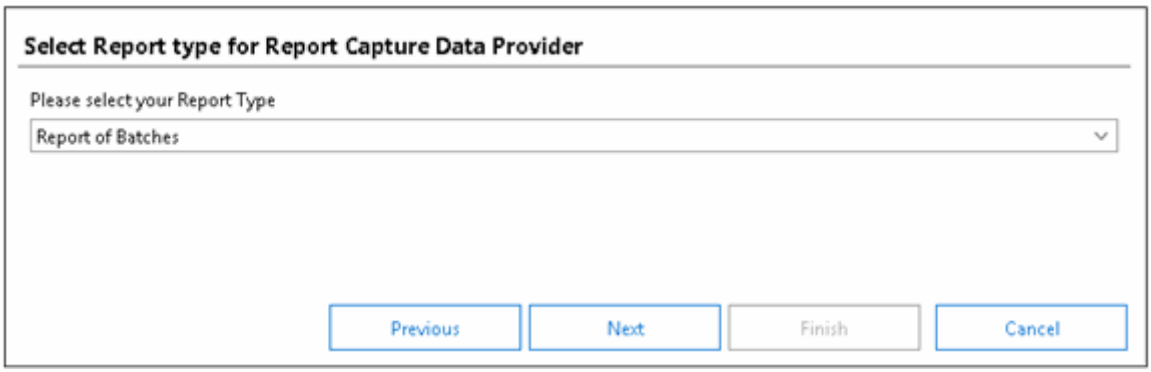
4. Type a name for the data provider in the **Name** field. The name should be unique and allow the data provider to be easily distinguished from other data providers.
5. Type a brief description of the data provider in the **Description** field. The description should briefly explain what the data provider is and what type of data a user can expect to retrieve from it.
6. Select **Log data provider execution** to include the elapsed time of data retrieval and runtime parameter information for this data provider in the **History** log. Data requests for the data provider are always logged in the history even if this option is deselected.
7. Click **Next**. Unless you are converting data from Report Services, the **Select the type of data you would like to report on** page is displayed. If you are converting data from Report Services, the **Edit SQL query** page is displayed.

Note: If you copied an existing data provider this page is not displayed. You cannot change the data provider type for copied data providers.



Note: The data providers available depend on the modules licensed for your system. The **Custom SQL Query** and **Document Query** data provider types are available to all systems with Reporting Dashboards.

8. Select **Report Capture Query**.
9. Click **Next**. The **Select Report type for Report** dialog box is displayed.



Select either **Report of Batches**, **Report of Requests**, **Report of Documents Uploaded**, or **Report of Duplicate Documents**.

10. Click **Next**. Depending on your selection, either the **Provide values for Report Of Batches configuration**, **Provide values for Report Of Requests configuration**, **Provide values for Report Of Documents Uploaded configuration**, or the **Provide vales for Report of Duplicate Documents configuration** dialog is displayed.

If you selected Report of Batches:

Note: Leave all options unselected to report on all batches.

- Select **Get Batches By State** to report on batches in a specific state.

Note: The **State** is specified on the next screen if this option is selected.

  - Select **Prompt users to select state at runtime** to allow users to report on the state of their choice.
- Select **Get Batches By Status** to report on batches with a specific status.

Note: The **Status** is specified on the next screen if this option is selected.

  - Select **Prompt users to select status at runtime** to allow users to report on the status of their choice.
- Select **Get Batches by Date Range** to report on batches generated during a specific date range. Select either **By Modified Date** or **By Creation Date**.

Note: The **Date Range** is specified on the next screen if this option is selected.

  - Select **Prompt users to select date range at runtime** to allow users to report on the date range of their choice.

If you selected Report of Requests:

- Select **Prompt users to enter batch ID number to get requests for the batch** to allow users to enter a specific batch ID number to report upon.

- Select **Get all requests with the following options** to report on requests for all batches adhering to the below selected options.
  - Select Get Requests by State to report on requests in a specific state.

Note: The **State** is specified on the next screen if this option is selected.

  - Select **Prompt users to select state at runtime** to allow users to report on the state of their choice.
  - Select **Get Requests By Status** to report on requests with a specific status.

Note: The **Status** is specified on the next screen if this option is selected.

  - Select **Prompt users to select status at runtime** to allow users to report on the status of their choice.
  - Select **Get Requests by Date Range** to report on requests generated during a specific date range. Select either **By Modified Date** or **By Creation Date**.

Note: The **Date Range** is specified on the next screen if this option is selected.

  - Select **Prompt users to select date range at runtime** to allow users to report on the date range of their choice.

If you selected Report of Documents Uploaded:

- Select **Prompt users to enter batch ID number to get documents for the batch** to allow users to specify a batch at runtime.
- Select **Prompt users to enter request ID number to get documents for the request** to allow users to specify a request at runtime.
- Select **Get all documents uploaded with the following options to report on all documents** uploaded adhering to the below selected options.
  - Select **Get Documents by Date Range** to report on documents uploaded during a specific date range. Select either **By Modified Date** or **By Creation Date**.

Note: The **Date Range** is specified on the next screen if this option is selected.

  - Select **Prompt users to select date range at runtime** to allow users to report on the date range of their choice.

If you selected Report of Duplicate Documents:

- Select **Get Duplicate Documents by Date Range** to report on duplicate documents generated during a specific date range. Select either **By Modified Date** or **By Creation Date**.

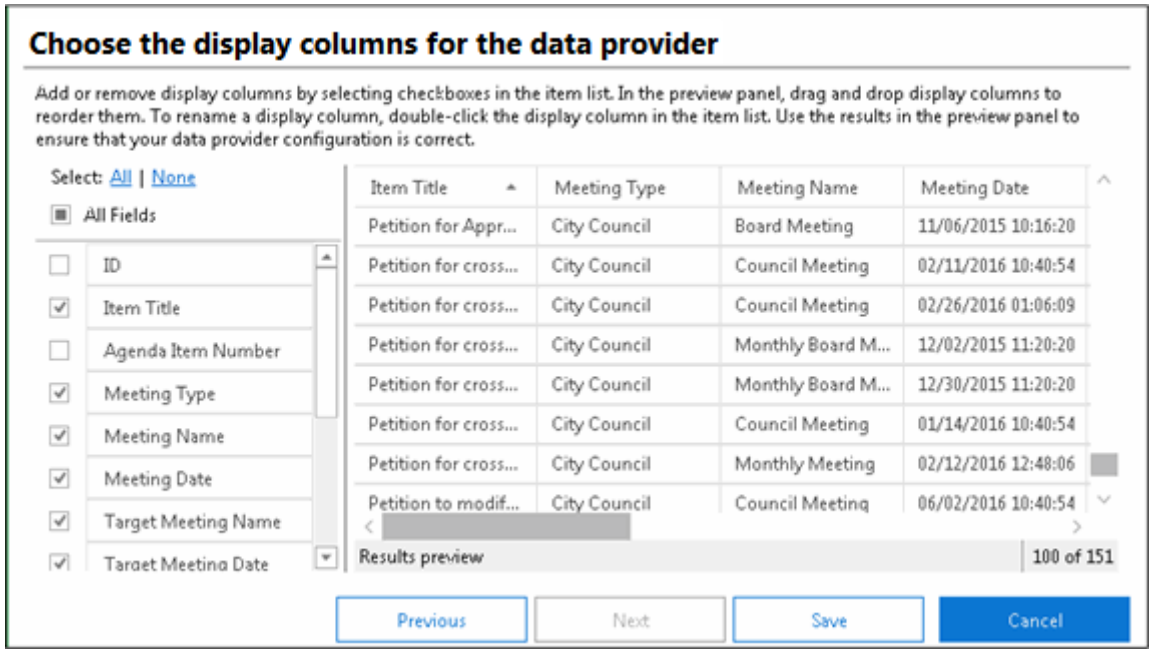
Note: The **Date Range** is specified on the next screen if this option is selected.

- Select **Prompt users to select date range at runtime** to allow users to report on the date range of their choice.

11. Click **Next**. The **Choose the display columns for the data provider** dialog box is displayed.

Note: If the **Restrict user input to select list values** option was selected in the **Edit SQL Parameter** dialog box, you are required to select a default value for the select list prior to selecting display columns for the data provider. Select a value from the drop-down select menu and click **Next**. The **Choose the display columns for the data provider** dialog box is displayed.

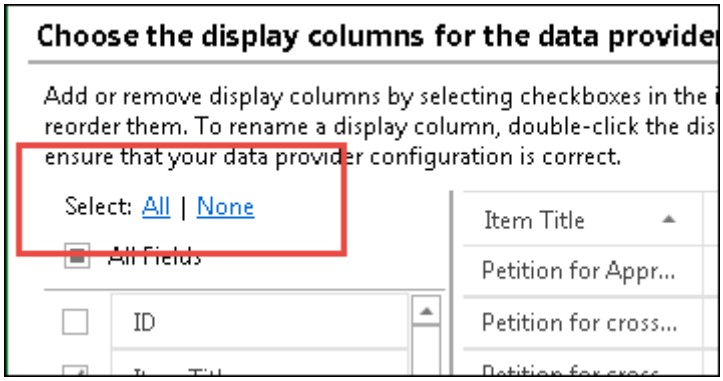
The display columns available depend on the data provider type being configured. If the data provider being configured allowed you to pre-select the display columns available, only the display columns selected earlier in the configuration process are available.



12. Select a display column to include it in the results, or deselect it to hide it.

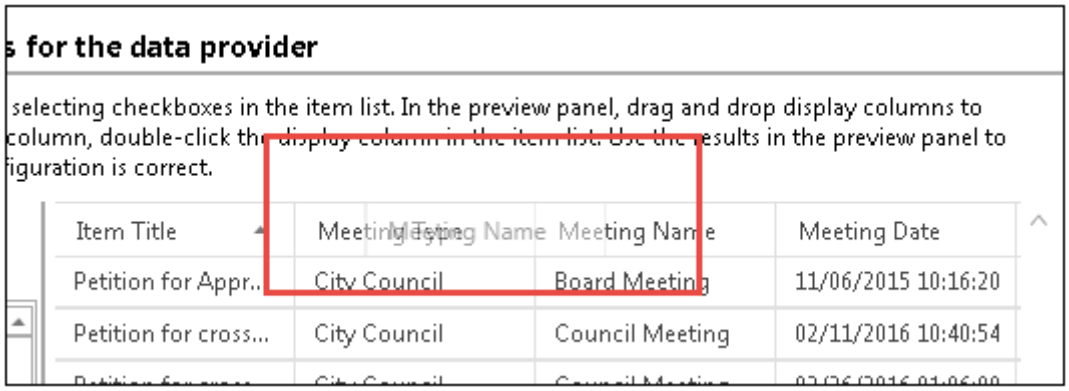
Note: In order for users to be able to open a document directly from a dashboard, the system Keyword Type **Document ID** must be included as a display column.

Click **None** to deselect all display columns or click **All** to select all display columns.



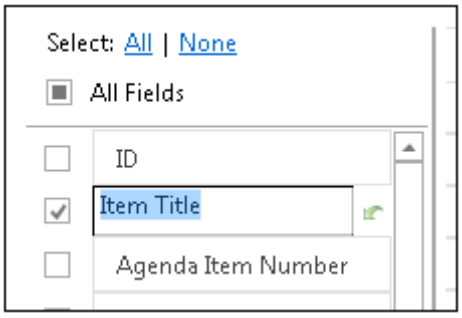
Tip: A preview of the type of data that is returned with the display columns selected is displayed in the preview pane at the right of the list of display columns. If the data returned is not acceptable, select different display columns or click **Previous** to reconfigure previous aspects of the data provider.

13. To reorder the display columns, drag-and-drop the column headings in the preview pane to put them in the desired order.

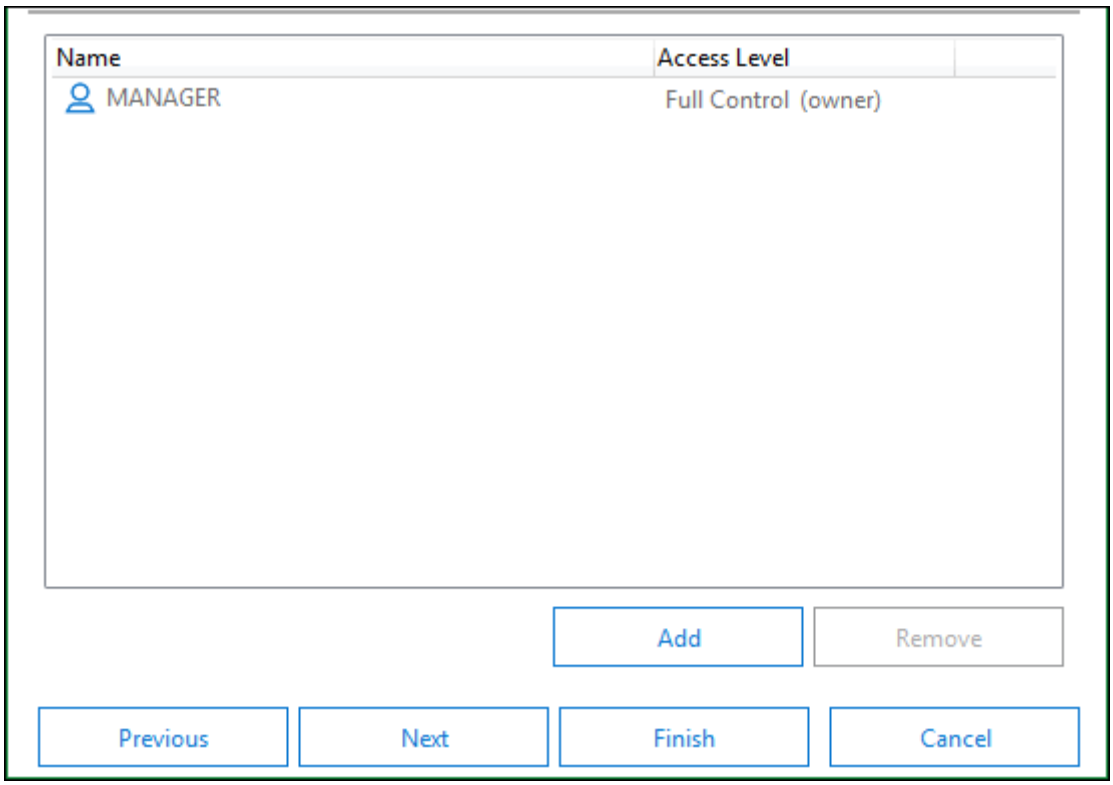


14. To rename a display column, double-click the name in the list, and type the new name in the field provided. Click anywhere outside the field to save the changes.

Note: Display column names must not be blank or end with a space.



15. Click **Next**. The **Who should have access to the data provider?** dialog box is displayed.



16. To grant access to a new user, click **Add**. The **Select Users** dialog box is displayed. Only users and users groups with access to Report Capture are listed.
17. Click **Next**. The **Summary** dialog box is displayed. Review the information in the main pane to confirm that the data provider is correctly configured. If not, click **Previous** to return to the various configuration dialog boxes so that changes can be made.
18. Click **Finish**. The data provider is saved and is available for use with dashboards.

OnBase®
Foundation EP5

Report Capture

Installation Guide

Foundation EP5

Requirements

The following sections outline requirement information specific to Report Capture in OnBase Foundation EP5.

General Requirements

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

- Supported Desktop Operating Systems, see the **OnBase Client** and the **Web/ Application Server** table columns
- Client Retrieval Workstation Hardware Requirements
- Databases Supported, see **Microsoft SQL Server**

Note: Oracle databases are not supported for Report Capture with Meditech Magic.

- Database/File Servers
- Microsoft .NET Framework Requirements

Microsoft Visual C++ Requirements

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

Workstations running Report Capture require the following:

- Microsoft Visual C++ 2012 Redistributable Package (x86)
- Microsoft Visual C++ 2013 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)

Licensing

See Licensing on page 1 for licensing requirements.

Pre-Installation

Prior to installing the Report Capture module, you must ensure that your OnBase Application Server has been installed and configured properly.

For more information on installing the Application Server, see the Application Server module reference guide.

Installation

The Report Capture module is installed via the Hyland Report Capture installer.

Overview

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

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

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

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

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

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

ClickOnce deployments also have the following advantages:

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

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

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

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

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

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

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

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

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

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

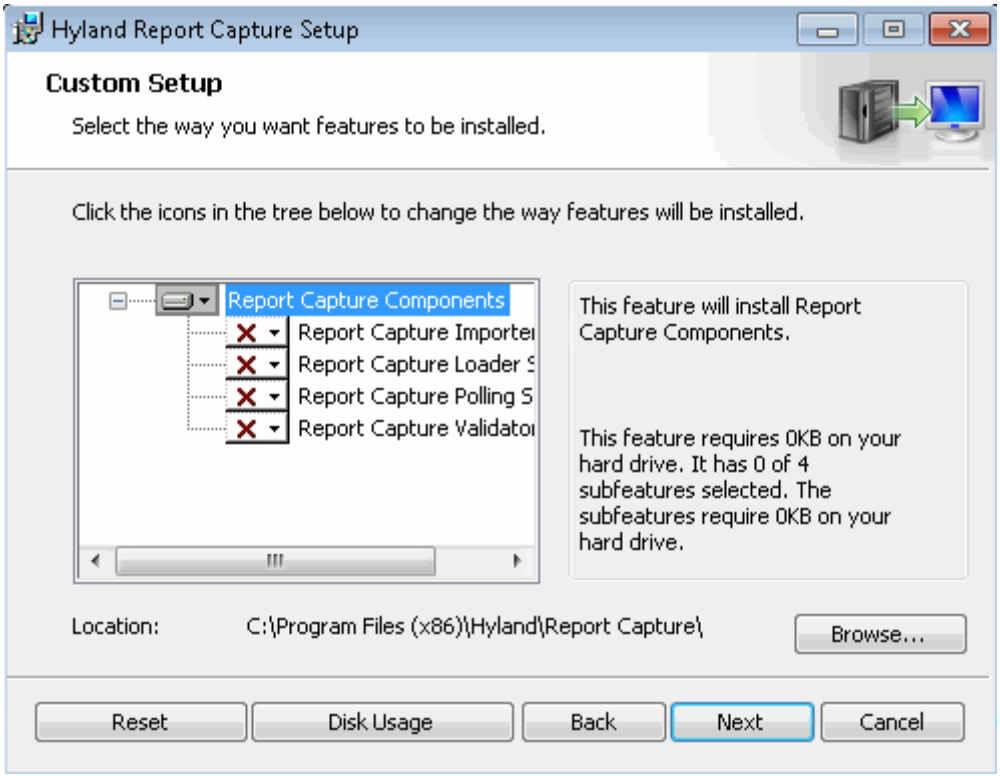
Running the Installer

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

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

The Hyland Report Capture installation welcome dialog is displayed.

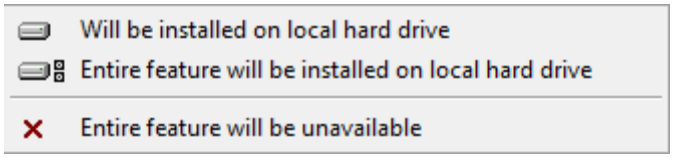
1. Click **Next**. The **Custom Setup** dialog box is displayed.



The following components can be installed using the Hyland Report Capture installer:

Component	Description
Report Capture Importer Service	The Report Capture Importer Service serves as an LPR printing device for Meditech and prints reports as PCL files.
Report Capture Loader Service	The Report Capture Loader Service loads Report Capture PCL files into your OnBase system.
Report Capture Polling Service	The Report Capture Polling Service polls your hosted OnBase system for Report Capture requests and sends them to Meditech.
Report Capture Validator Service	The Report Capture Validator Service parses Meditech reports and uploads the data into your OnBase system.

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



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

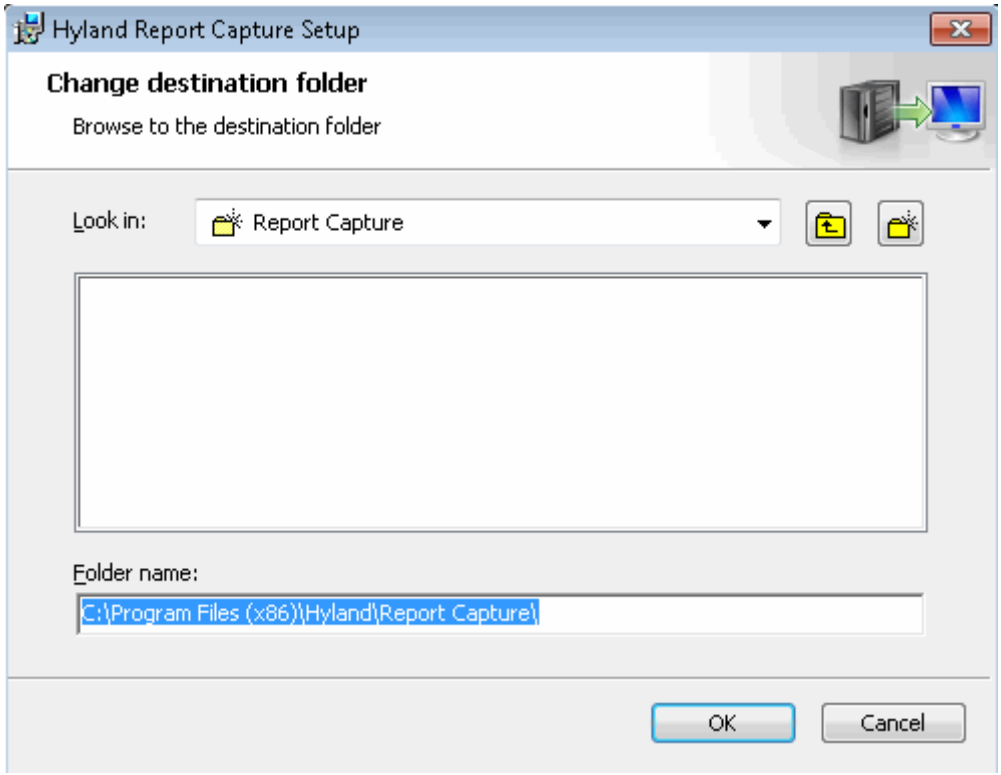
3. Select **This feature will be installed on local hard drive** for each component you want to install.

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

Note: Depending on which components you choose to install, one or more of the following steps may not apply to your installation.

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

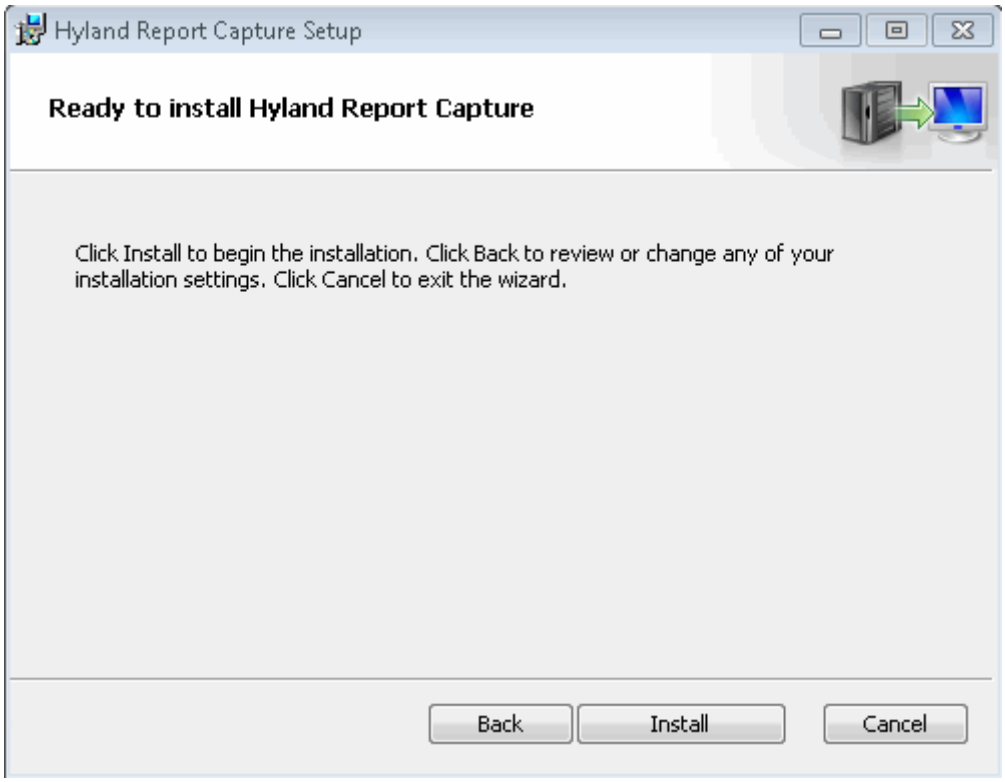
5. To change the installation location of a component, select it and click **Browse**. The **Change destination folder** dialog is displayed.



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

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

6. Click **Next**. The **Ready to install Hyland Report Capture** dialog is displayed.



7. Click **Install** to install the selected components.

   Click **Back** to return to the previous dialog to change configuration options, or click **Cancel** to close the installer without installing any of the selected components.
8. When the **Completed the Hyland Report Capture Setup Wizard** dialog is displayed, click **Finish** to complete the installation.

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

9. If you installed the Report Capture Scripting Tray, you must manually launch the Scripting Tray application to start the scripting engine. Once launched, the Scripting Tray icon is displayed in the Windows taskbar.

   You can stop or restart the scripting engine by clicking on the icon and selecting **Stop Scripting** or **Restart Scripting**, respectively.

Change, Repair, or Remove an Installation

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

Select the option for the actions you wish to perform:

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

Running the Installer From the Command Line

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

Feature Names

You can control the installation of components from the command line using the **ADDLOCAL** property. To install a component, pass its feature name to the installer using the **ADDLOCAL** property. The table below lists the feature names for each component in the Hyland Report Capture installer.

The **ADDLOCAL** property is appended to the end of the install command line, as shown here:
msiexec /i "Hyland Report Capture.msi" ADDLOCAL=ReportCapture

This example installs the Report Capture.

Note: Feature names are case sensitive and must be added to the command line exactly as they appear in this table. For details on the associated properties, see Property Names on page 35.

Component	Feature Name
Report Capture Importer Service	**ReportCaptureImporter**
Report Capture Loader Service	**ReportCaptureLoader**
Report Capture Polling Service	**ReportCapturePolling**
Report Capture Validator Service	**ReportCaptureValidator**
Report Capture Scripting Tray	**ReportCaptureScripting**

Property Names

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

Property	Description
NTSERVICE_USE_DOMAIN_ACCOUNT	Specifies whether a domain account is used to run the installed services. Enter **1** to run the services under a specified domain account. To disable this option, set this property to **0**. By default, this property is set to **0**. For example: **NTSERVICE_USE_DOMAIN_ACCOUNT="1"**
NTSERVICE_USER	The domain user account to use if NTSERVICE_USE_DOMAIN_ACCOUNT is set to **1**. For example: **NTSERVICE_USER="domain\username"**

Property	Description
NTSERVICE_PASS	The password for the NTSERVICE_USER account. For example: **NTSERVICE_PASS="MyPassword"**

Configuration Files

During installation, a configuration file and a configuration application shortcut that corresponds to each of the Report Capture components being installed (for example, the Importer Service, Loader Service, Polling Service, Validator Service, and Scripting Tray) is created and placed in the location where Report Capture is being installed. For example:

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

While many of the configuration settings are set during the installation, you can change these and other settings in the appropriate configuration file after the installation to modify the setup and behavior of your Report Capture solution.

The configuration application is used to modify Application Server connection settings that require encryption within the corresponding component's configuration file. For more information on modifying settings for each corresponding Report Capture component, see the following sections:

- Modifying the Importer Service's Configuration File on page 36
- Modifying the Loader Service's Configuration File on page 38
- Modifying the Polling Service's Configuration File on page 39
- Modifying the Validator Service's Configuration File on page 40
- Modifying the Scripting Tray's Configuration File on page 43
- Modifying the Service's Application Server Settings on page 48

Modifying the Importer Service's Configuration File

To modify settings that correspond to the Report Capture Importer Service, open the **Hyland.Applications.ReportCapture.RCImporterSvc.exe.config** file.

Application Settings	Description
LpdIP	Set this option equal to the IP address of the machine that is running the LPD Server.
LpdPort	Set this option equal to the port to which the LPD Server is connected.

Application Settings	Description
ProcessInterval	Set this option equal to the number of milliseconds you would like the Importer Service to wait before making another attempt to connect to the LPD Server's assigned port. Because other services may be assigned to the same port, but only one service can use the port at a time, the Importer Service may have to make multiple attempts to connect. By default, the **ProcessInterval** setting is set to **6000**, meaning that the Importer Service attempts to connect to the LPD Server's port every six seconds.
BackupArea	Set this option to the location of your **backup** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. By default, the Report Capture installation creates your **backup** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\backup** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\backup** (in a 64-bit environment)
PrimaryArea	Set this option to the location of your **primary** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. By default, the Report Capture installation creates your **primary** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\primary** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\primary** (in a 64-bit environment)
TimeoutInMs	Set this option equal to the number of milliseconds you would like the Importer Service to wait before making another attempt to connect to Meditech after a failed attempt. By default, the **TimeoutInMs** setting is set to **10**, meaning that the Importer Service attempts to connect to Meditech every 0.01 seconds.
ImporterID	This option prepends a unique ID to the file name of files handled by this specific importer service so that the importer service used to handle certain files can be identified. Set this option to an alphanumeric value. The value cannot exceed 30 characters. The ampersand (&) is not supported in this value.

Application Settings	Description
EnableEncryption	This option controls whether the PCL files of Meditech reports created by the Importer Service are encrypted in the **backup** and **Staging** folders. Encrypting these files helps to protect data and ensure compliance with HIPAA standards. By default, the **EnableEncryption** setting is set to **true**, meaning that the PCL files will be encrypted. To disable encryption, set this option to **false**.

Modifying the Loader Service's Configuration File

To modify settings that correspond to the Report Capture Loader Service, open the **Hyland.Applications.ReportCapture.RCLoaderSvc.exe.config** file.

Application Settings	Description
BackupArea	Set this option to the location of your **backup** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. The Loader Service removes the files from this folder once it finishes uploading them into OnBase. By default, the Report Capture installation creates your **backup** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\backup** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\backup** (in a 64-bit environment)
Interval	Set this option equal to the number of milliseconds you would like the main service thread to wait before checking for new work to be performed by the Loader Service. By default, the **Interval** setting is set to **6000**, meaning that the main service thread checks for new work to be performed by the Loader Service every six seconds.
ExternalSystemIDs	Set this option to the system IDs for your hosted OnBase system. By default, the **ExternalSystemIDs** setting is set to **2,9,10**. This comma-separated value contains three external system ID numbers for the three default external Meditech systems: Meditech system (**2**), your Meditech Client/Server system (**9**), and your Meditech MAT system (**10**). The loader service only processes requests for systems configured in this setting.

Modifying the Polling Service's Configuration File

To modify settings that correspond to the Report Capture Polling Service, open the **Hyland.Applications.ReportCapture.RCPollingSvc.exe.config** file.

Application Settings	Description
RetryCount	Set this option to the number of times the polling service tries to reconnect to the Application Server when it has lost connection.
DelayBetweenRetries	Set this option to the number of milliseconds the polling service delays retrying to reconnect to the Application Server after a lost connection.
ExternalSystemIDs	Set this option to the system IDs for your hosted OnBase system. By default, the **ExternalSystemIDs** setting is set to **2,9,10**. This comma-separated value contains three external system ID numbers that allow the Polling Service to send Report Capture requests from your OnBase system to your Meditech system (**2**), your Meditech Client/Server system (**9**), and your Meditech MAT system (**10**), respectively. The polling service only picks up batch requests for systems configured in this setting.
Interval	Set this option equal to the number of milliseconds you would like the main service thread to wait before checking for new work to be performed by the Polling Service. By default, the **Interval** setting is set to **15000**, meaning that the main service thread checks for new work to be performed by the Polling Service every 15 seconds.

By default, the code below is not included in the **Hyland.Applications.ReportCapture.RCPollingSvc.exe.config** file. However, it is considered a best practice to manually add this code to the configuration file to enable error tracing for the Report Capture Polling Service, adjusting the level of tracing detail as appropriate.

```
<system.diagnostics>
<switches>
<add name="hylandTracing" value="3"/>
</switches>
```

```
</system.diagnostics>
```

<System.diagnostics> Settings	Description
hylandTracing	This switch controls error tracing through the Diagnostics Console. Set this switch equal to the number representing the desired level of tracing detail. • **0:** no error tracing • **1:** minimal • **2:** normal • **3:** detailed • **4:** verbose By default, the **hylandTracing** setting is set to **3**, meaning that detailed error messages will be logged in the Diagnostics Console.

Modifying the Validator Service's Configuration File

To modify settings that correspond to the Report Capture Validator Service, open the **Hyland.Applications.ReportCapture.RCValidatorSvc.exe.config** file.

Application Settings	Description
BackupArea	Set this option to the location of your **backup** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. The Validator Service parses the files in this folder and uploads the data into OnBase. By default, the Report Capture installation creates your **backup** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\backup** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\backup** (in a 64-bit environment)
PrimaryArea	Set this option to the location of your **primary** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. The Validator Service parses the files in this folder and uploads the data into OnBase. By default, the Report Capture installation creates your **primary** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\primary** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\primary** (in a 64-bit environment)

Application Settings	Description
StagingArea	Set this option to the location of your **Staging** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files after the Validator Service has parsed their data. The Loader Service removes the files from this folder once it finishes uploading them into OnBase. By default, the Report Capture installation creates your **Staging** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Staging** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Staging** (in a 64-bit environment)
BackEnd	Set this option to the location you would like the Validator Service to store the data it parses from the PCL files. By default, the **BackEnd** setting is set to **OnBase**, meaning that the parsed data is stored in your OnBase database. To have the parsed data stored in XML files instead, set this option to **XML**.
AnalysisArea	Set this option to the location of your **Analysis** folder, which stores the PCL files that could not be processed, for troubleshooting purposes. By default, the Report Capture installation creates your **Analysis** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Analysis** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Analysis** (in a 64-bit environment)
RemoveHeaderTrailerFile	This option controls whether the Validator Service deletes the **Header** and **Trailer** components of reports after processing them. By default, the **RemoveHeaderTrailerFile** setting is set to **true**, meaning that the Validator Service removes reports' **Header** and **Trailer** files after parsing their data. To prevent the Validator Service from deleting these files, set this option to **false**.
RetryTimeInterval	Set this option equal to the number of seconds you would like the Validator Service to wait before attempting to parse data from the PCL files. The value may need to be adjusted to allow the Importer Service more time to finish printing the PCL files. By default, the **RetryTimeInterval** setting is set to **1**, meaning that the Validator Service will wait one second before attempting to parse data from the PCL files.

Application Settings	Description
AnalysisFileSize	Set this option equal to the minimum file size (in bytes) a PCL file must be before the Validator Service parses its data. If a PCL file does not meet this minimum size, it is automatically sent to the **Analysis** folder. This option prevents blank files from being processed. By default, the **AnalysisFileSize** setting is set to **1024**, meaning that a PCL file must be at least 1024 bytes (1 KB) in order to be processed by the Validator Service.
PCLFileType	Set this option equal to the OnBase file type number of documents imported to OnBase by Report Capture. This value can be set to any OnBase file type. By default, the **PCLFileType** setting is set to **46**. This is the recommended setting.
Interval	Set this option equal to the number of milliseconds you would like the main service thread to wait before checking for new work to be performed by the Validator Service. By default, the **Interval** setting is set to **6000**, meaning that the main service thread checks for new work to be performed by the Validator Service every six seconds.
RemoveBlankFile	This option controls whether blank PCL files of Meditech reports are stored in the **backup** folder or discarded. By default, the **RemoveBlankFile** setting is set to **true**, meaning that blank PCL files will be removed from both the **backup** and **primary** folders. To have blank PCL files stored in the **backup** folder (but still removed from the **primary** folder), set this option to **false**.
EnableEncryption	This option controls whether the PCL files of Meditech reports created by the Importer Service are encrypted in the **backup** and **Staging** folders. Encrypting these files helps to protect data and ensure compliance with HIPAA standards. By default, the **EnableEncryption** setting is set to **true**, meaning that the PCL files will be encrypted. To disable encryption, set this option to **false**.
ExternalSystemID	Set this value to the ID of the external Meditech system the Validator serves. The default value of this setting is **2**, which corresponds with the default Meditech system

Modifying the Scripting Tray's Configuration File

To modify settings that correspond to the Report Capture Scripting Tray, open the **Hyland.Applications.ReportCapture.RCScriptingTray.exe.config** file.

Application Settings	Description
AppServerUrl	Set this option to the URL of your OnBase Application Server. For example: **http://ServerName/ApplicationServer/service.asmx**
DataSource	Set this option to the name of the ODBC connection to your OnBase database.
UserName	Set this option to the user name of the service account used to run Report Capture.
Password	Set this option to the password of the service account used to run Report Capture.
Interval	Set this option equal to the number of milliseconds you would like the main service thread to wait before checking for new work to be performed by the Scripting Tray. By default, the **Interval** setting is set to **15000**, meaning that the main service thread checks for new work to be performed by the Scripting Tray every 15 seconds.
ReportDefsFile	Set this option to the fully qualified name of your **ReportDefs.xml** file, which contains the script schema that defines the scripting activities for your solution. By default, the Report Capture installation sets this fully qualified name in the location where Report Capture was installed and points to the **ReportDefs.xml** file, which you must create manually and place in this same location. The following are examples of the default fully qualified names set during installation: • **C:\Program Files\Hyland\Report Capture\ReportDefs\ ReportDefs.xml** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\ReportDefs\ ReportDefs.xml** (in a 64-bit environment)

Application Settings	Description
ReportsPath	Set this option to the location of your **Reports** folder, which is the parent folder of the child folders (i.e., **Failed** and **Success**) that store failed and successful request files. By default, the Report Capture installation creates your **Reports** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Reports** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Reports** (in a 64-bit environment)
FailedPath	Set this option to the location of your **Failed** folder, which stores failed request files. **Note:** The filenames of the failed request files are altered to include timestamps. By default, the Report Capture installation creates your **Failed** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Reports\Failed** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Reports\ Failed** (in a 64-bit environment)
SuccessPath	Set this option to the location of your **Success** folder, which stores successful request files if the **DeleteRequestFiles** setting is set to **false**. If the **DeleteRequestFiles** setting is set to **true**, no files are stored in the **Success** folder. **Note:** The filenames of the successful request files are altered to include timestamps. By default, the Report Capture installation creates your **Success** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Reports\Success** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Reports\ Success** (in a 64-bit environment)

Application Settings	Description
ScriptingPrinterName	Set this option to the name of the printer configured to use the Importer Service (e.g., a printer using the PCL 5 print driver).
ScriptingPort	Set this option equal to the port on which the Scripting Tray will receive requests from the Polling Service.
DeleteRequestFiles	This option controls whether successful request files are deleted after processing. By default, the **DeleteRequestFiles** setting is set to **false**, meaning that successful request files are not deleted after processing (and thus are stored in the **Success** folder). To delete these files after processing so that nothing is stored in the **Success** folder, set this option to **true**.
MeditechPrinterName	Set this option to the name of the printer configured to use the Importer Service in your Meditech system (e.g., a printer using the HP Laserjet 4 print driver).
PrinterTimeout	Set this option equal to the number of milliseconds you would like the Scripting Tray to wait for the print queue to become empty before proceeding. If the print queue is not empty when the service checks it, an exception is thrown and the batch stops processing. By default, the **PrinterTimeout** setting is set to **60000**, meaning that the Scripting Tray checks to ensure that the print queue is empty every 60 seconds.
HooksPort	Set this option equal to the port on which the Scripting Tray listens for evidence from the Hooks component.

Application Settings	Description
DefaultEvidenceTimeout	Set this option equal to the default number of milliseconds you would like to give ReportDef actions to complete before throwing an exception. **Note:** If a ReportDef action has an individual timeout defined in the **ReportDefs.xml** file, the individual timeout overrides the **DefaultEvidenceTimeout** setting. By default, the **DefaultEvidenceTimeout** setting is set to **10000**, meaning that ReportDef actions without individual timeout settings have 10 seconds to complete.
UsePlaceholders	This option controls whether placeholders should be used to test the Scripting Tray when reports cannot be scripted from an external system. By default, the **UsePlaceholders** setting is set to **false**, meaning that placeholders will not be used to test the Scripting Tray. To set placeholders to be used for testing, set this option to **true**.
CleanupTimeout	Set this option equal to the number of milliseconds you would like to allow the **Cleanup** report type (i.e., from the **ReportDefs.xml** configuration file) to stop and close the specified applications and services once the Scripting Tray has finished processing the script. If these applications and services have not been closed within the allotted time, an exception is thrown and all scripting activity is stopped. By default, the **CleanupTimeout** setting is set to **5000**, meaning that the **Cleanup** report type has five seconds to complete its work. For more information on the **Cleanup** report type, see The RCReportDef Parent Element on page 179.
ScreenWriteTimeout	Set this value to the number of milliseconds you want the Scripting Tray to wait for Hook Server calls to stop being processed before continuing with the next step. By default, this value is set to **30** milliseconds.

Application Settings	Description
FileSystemWatcherResetInterations	Set this option to the number of six-second intervals the file system watcher should wait before resetting itself when no files are found within the location configured in the **ReportsPath** setting. By default, this value is set to **100** six-second intervals.
FileReadRetryMilliseconds	Set this option to the number of milliseconds to wait before the file system watcher checks for new reports in the location configured in the **ReportsPath** setting. By default, this value is set to **1000** milliseconds.

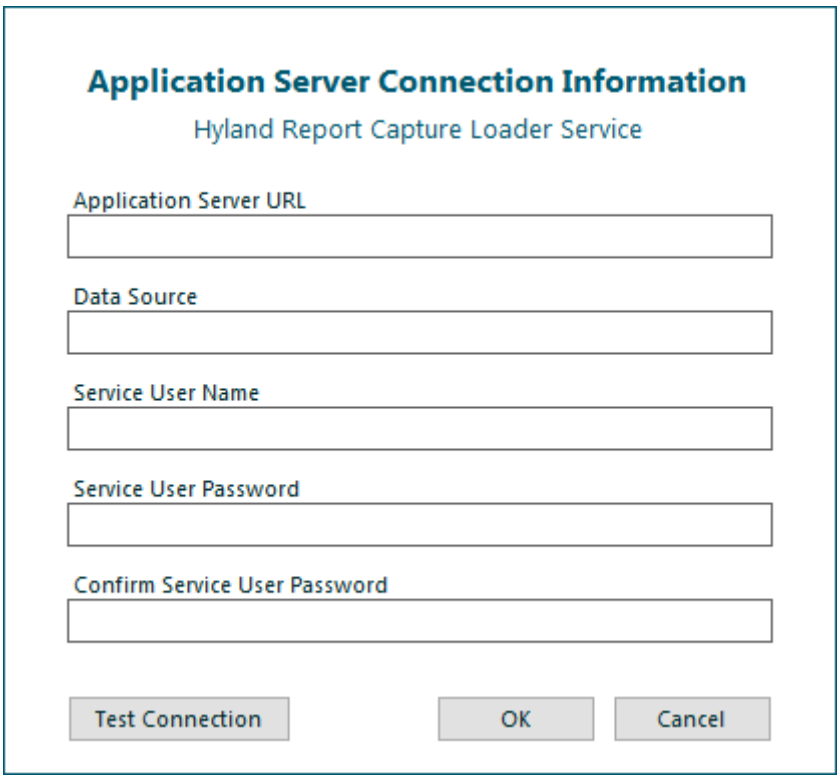
<System.diagnostics> Settings	Description
hylandTracing	This switch controls error tracing through the Diagnostics Console. Set this switch equal to the number representing the desired level of tracing detail. • **0:** no error tracing • **1:** minimal • **2:** normal • **3:** detailed • **4:** verbose By default, the **hylandTracing** setting is set to **3**, meaning that detailed error messages will be logged in the Diagnostics Console.

Modifying the Service's Application Server Settings

To modify Application Server settings requiring encryption that correspond to each Report Capture component:

1. Open the **Report Capture <Report Capture component> Service Configuration** shortcut. The **Application Server Connection Information** dialog box is displayed.

Note: The screen shot used in this section is for illustrative purposes only and reflect the Hyland Report Capture Loader Service **Application Server Connection Information** dialog box. The configuration application shortcut you open will reflect the name of the component you selected.



2. Edit the following Application Server settings.

Setting	Description
Application Server URL	The URL of your OnBase Application Server. For example: **http://ServerName/ApplicationServer/service.asmx**
Data Source	The data source name configured for your Application Server.
Service User Name	The OnBase Service Account user name used to run Report Capture.
Service User Password	The OnBase Service Account password used to run Report Capture.

Setting	Description
Confirm Service User Password	The OnBase Service Account password used to run Report Capture entered again for confirmation.

3. Click **Test Connection** to test your connection to the Application Server using the information you entered.
4. Click **OK**. The Application Server connection information is added to the component's configuration file as encrypted text.

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.

OnBase®
Foundation EP5

Report Capture

Administration Guide

Foundation EP5

OnBase Configuration

To configure your OnBase Report Capture solution, you must use the OnBase Configuration module to create and configure specific Keyword Types and Document Types, and set several required settings. Once you finish using OnBase Configuration to set up your Report Capture solution, you can use the **Report Capture System Main Menu** within Meditech to configure and manage your solution.

Configuring Required Keyword Types

Configure the following Keyword Types:

Keyword Type	Description
Account Number	This Keyword Type will be used to store account numbers, and should already exist in your OnBase system for use with the OnBase for Meditech solution. See your OnBase for Meditech documentation for more information on configuring this Keyword Type.
Medical Record Number	This Keyword Type will be used to store the user's Meditech MRN, and should already exist in your OnBase system for use with the OnBase for Meditech solution. See your OnBase for Meditech documentation for more information on configuring this Keyword Type.
Report URN	This Keyword Type should be configured as an Alphanumeric Keyword Type at least 50 characters long. It will be used to identify unique report names for individual accounts.
Report Mnemonic	This Keyword Type should be configured as an Alphanumeric Keyword Type at least 45 characters long. It will be used to differentiate between different reports of the same report name and account.

Note: All Keyword Type Names are suggestions. If desired, you can use different names when creating these Keyword Types.

For more information on the configuration of Keyword Types, see the System Administration documentation.

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

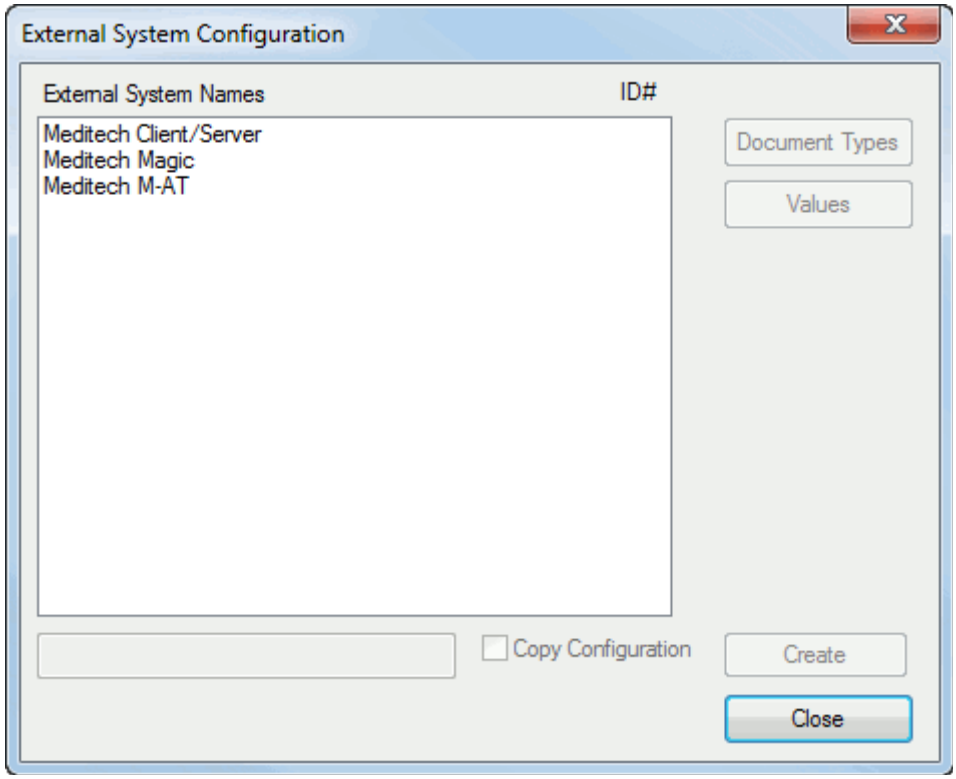
Keyword Type Name	Description	Configuration
Facility Name	The name of the facility in which the patient encounter took place. This Keyword Type must either be mapped to an external Meditech system, to specific Document Types in an external Meditech system, or to Chart Data Fields. See the **OnBase for Meditech with ODA** module reference guide for more information about mapping this Keyword Type to Meditech.	**Data Type**: Alphanumeric **Length**: Varies, depending on configured medical facility names.

Configuring Keyword Types for the Unmapped Form Document Type

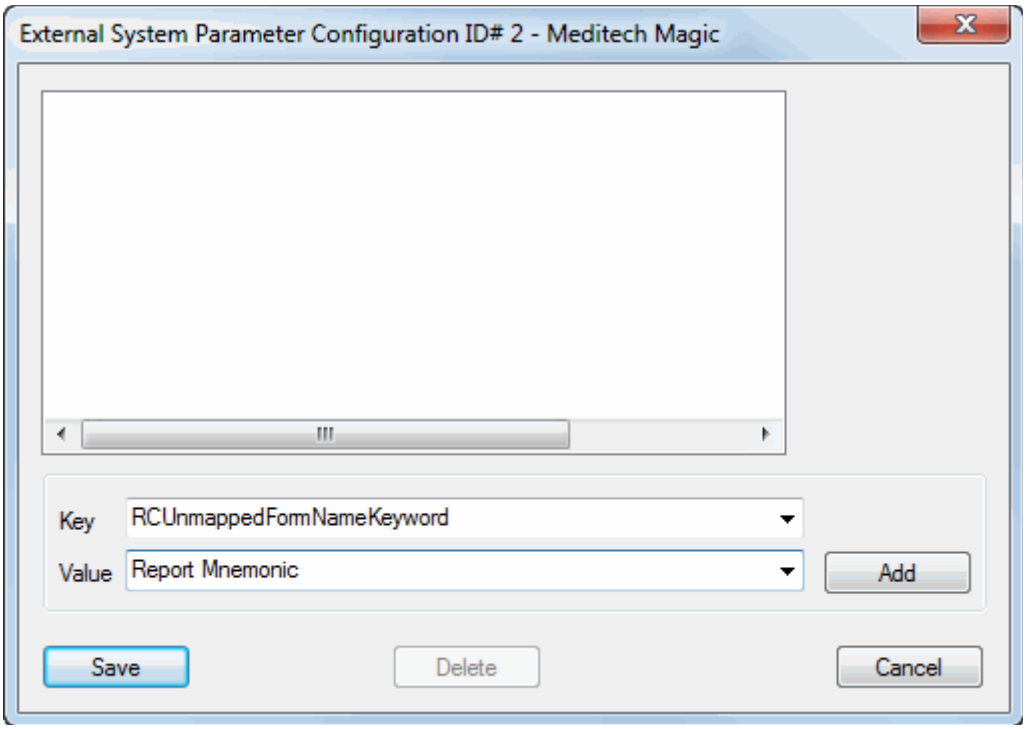
When configuring a Document Type that will be used to store documents that have not been mapped to any specific Document Type (see Configuring the Unmapped Report Document Type on page 55), it is considered a best practice to also configure a Keyword Type that will be used to identify the Meditech form to which the unmapped documents belong, and to assign this Keyword Type to the unmapped Document Type. Once this Keyword Type has been created and properly configured, the appropriate Meditech form will be automatically indexed for this Keyword Type when documents are uploaded into OnBase, thus simplifying the re-indexing process for unmapped documents.

To configure a Keyword Type for the unmapped form Document Type:

1. In OnBase Configuration, create a Document Type that will be used to store documents that have not been mapped to any specific Document Type, and assign the **Report Mnemonic** Keyword to it.
2. Select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



3. Select **Meditech Magic** and click **Values**. The **External System Parameter Configuration ID# 2 - Meditech Magic** dialog is displayed.



4. Type **RCUnmappedFormNameKeyword** in the **Key** field.
5. Type **Report Mnemonic** in the **Value** field.
6. Click **Add**.
7. Click **Save** to return to the **External System Configuration** dialog.
8. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 5 to 8.

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

Configuring Required Document Types

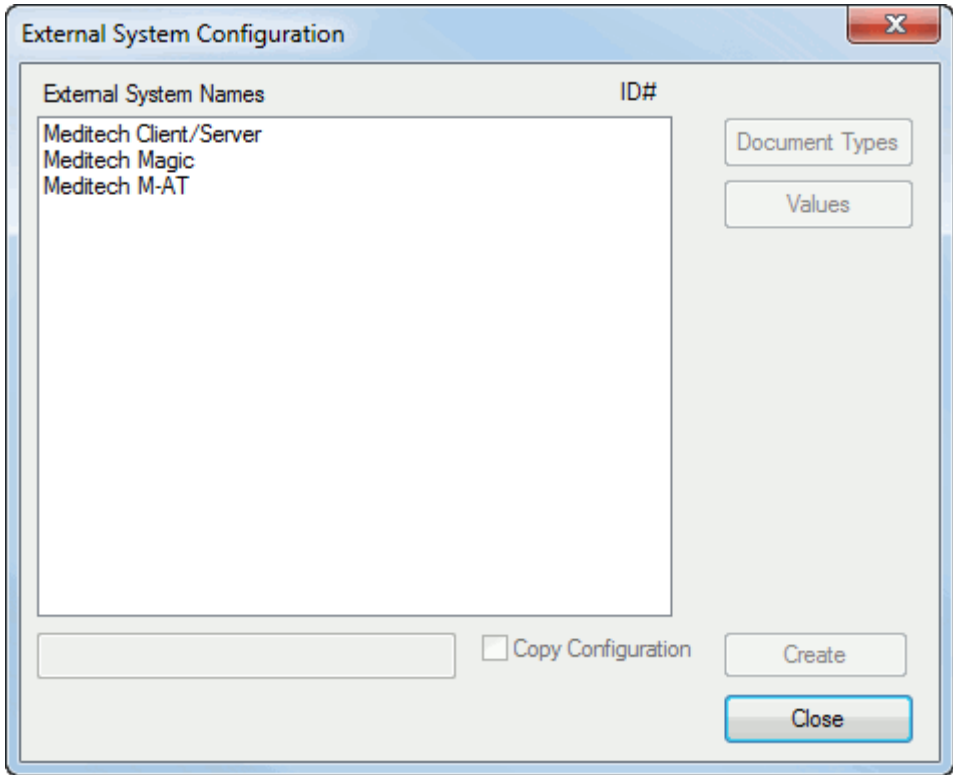
Configure Document Types for the Meditech report types that will be sent to OnBase via Report Capture, as appropriate. Each Document Type must be associated with the **Report URN**, **Medical Record Number**, **Account Number**, and **Report Mnemonic** Keyword Types.

For more information on the configuration of Document Types, see the System Administration documentation.

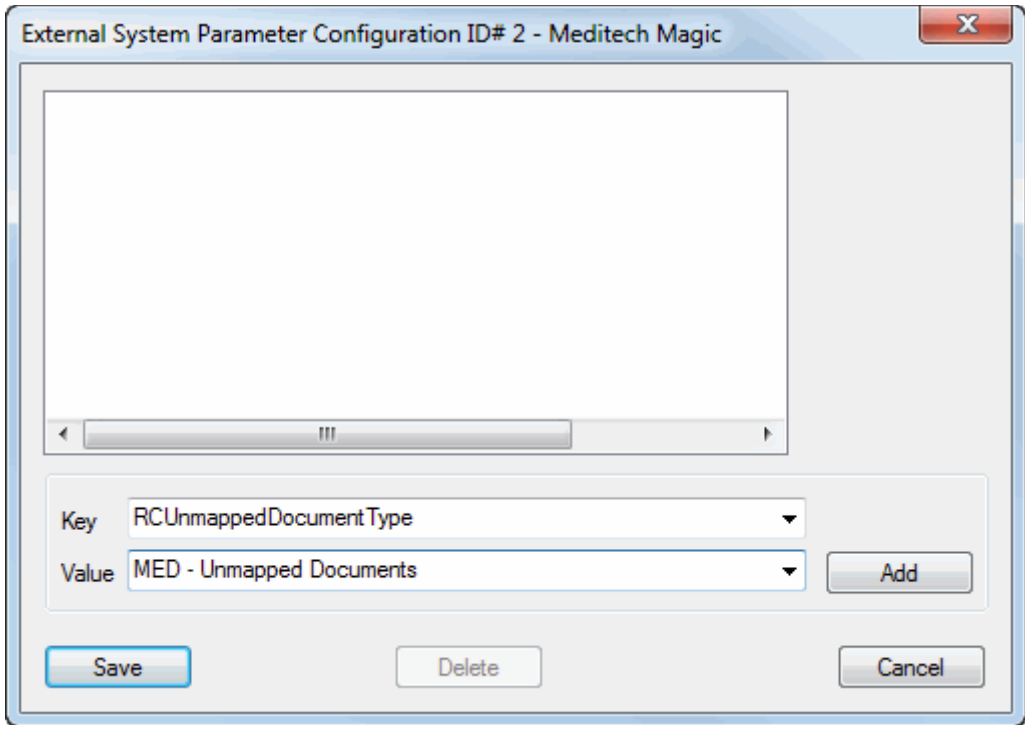
Configuring the Unmapped Report Document Type

You must also configure a Document Type that will be used to store documents that have not been mapped to any specific Document Type. This Document Type must be configured with the **Non Revisable** option, and should be associated with the **Report URN** Keyword Type. Once you have configured this Document Type, you must map it to the appropriate External System Parameter. To do so, follow these steps:

1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



2. Select **Meditech Magic** and click **Values**. The **External System Parameter Configuration ID# 2 - Meditech Magic** dialog is displayed.



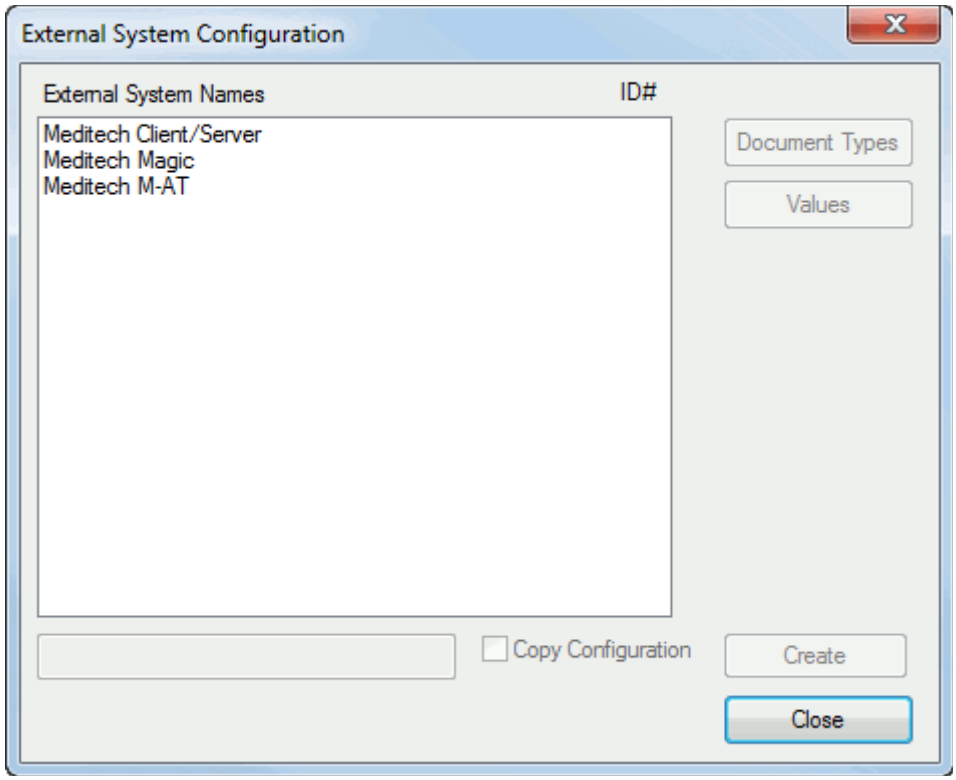
3. Type **RCUnmappedDocumentType** in the **Key** field.
4. Type the exact name of the Document Type you created to store unmapped documents in the **Value** field.
5. Click **Save** to return to the **External System Configuration** dialog.
6. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 3 to 5.

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

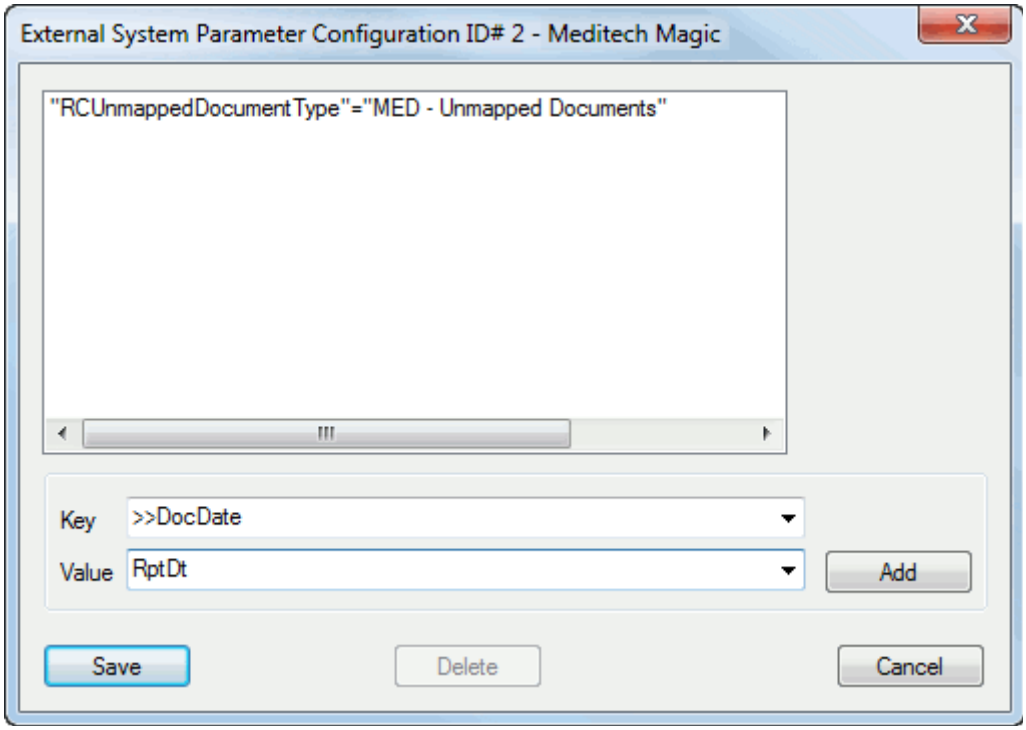
Configuring the Default Document Date

By default, the **Document Date** for documents printed into OnBase is set to the date the document is imported into OnBase. If desired, you can configure your Report Capture solution so that the **Document Date** is automatically set to the date the document was created in Meditech. To do so, follow these steps:

1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



2. Select **Meditech Magic** and click **Values**. The **External System Parameter Configuration ID# 2 - Meditech Magic** dialog is displayed.



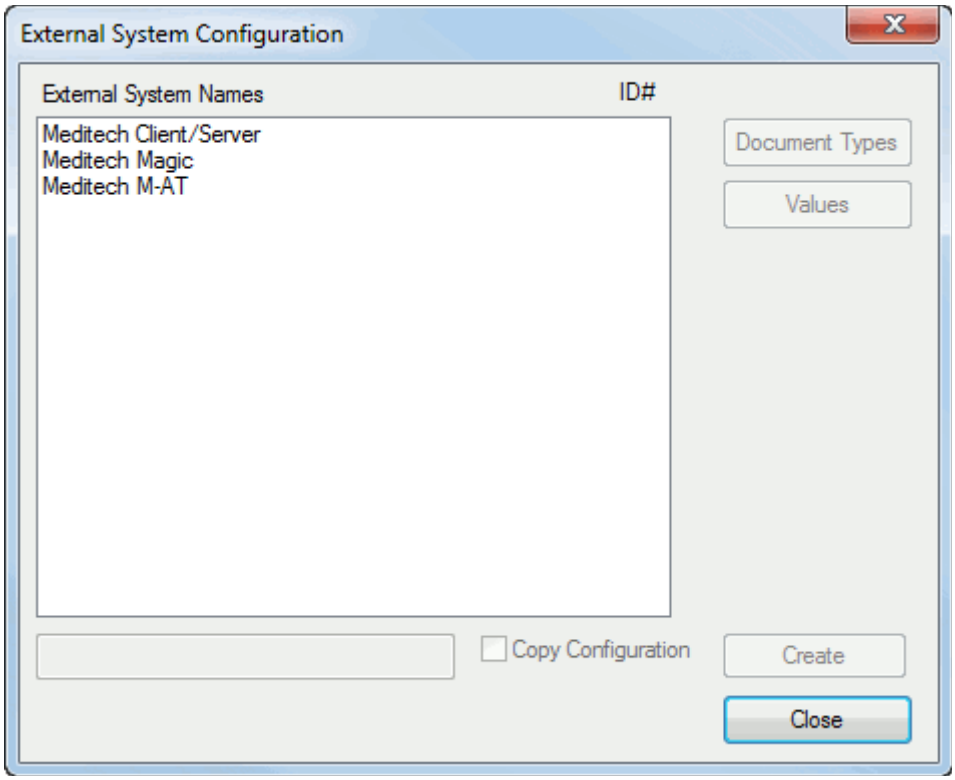
3. Type **>>DocDate** in the **Key** field.
4. Type **RptDt** in the **Value** field.
5. Click **Save** to return to the **External System Configuration** dialog.
6. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 3 to 5.

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

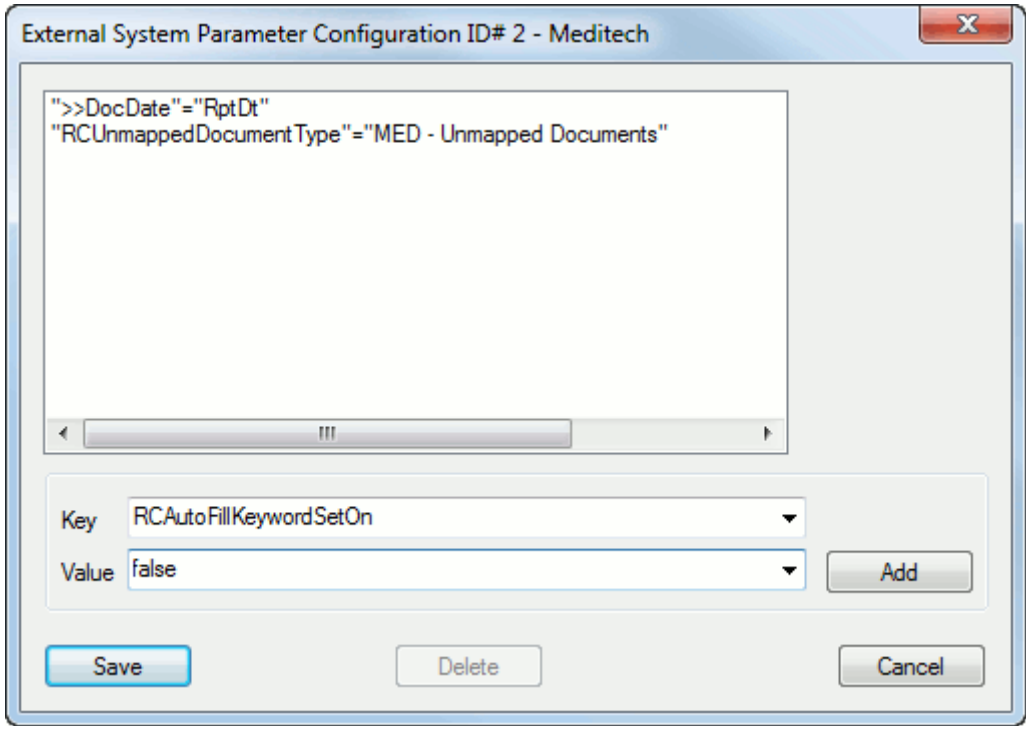
Disabling Indexing Using AutoFill Keyword Sets

By default, your Report Capture solution is configured to automatically index documents using any AutoFill Keyword Set(s) that use any of the required Meditech Keyword Types as the Primary Keyword Value. If you do not want these AutoFill Keyword Sets to be automatically expanded, follow these steps:

1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



2. Select **Meditech Magic** and click **Values**. The **External System Parameter Configuration ID# 2 - Meditech Magic** dialog is displayed.



3. Type **RCAutoFillKeywordSetOn** in the **Key** field.
4. Type **false** in the **Value** field.
5. Click **Save** to return to the **External System Configuration** dialog.
6. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 3 to 5.

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

Configuring Facilities for Meditech Systems

If your solution includes multiple Meditech systems, individual facilities can be configured to allow Report Capture requests from specific Meditech systems. Report Capture requests are processed against the facility with which the patient is associated, and the Meditech external system mappings for that facility are used to determine which Meditech system is associated with that facility.

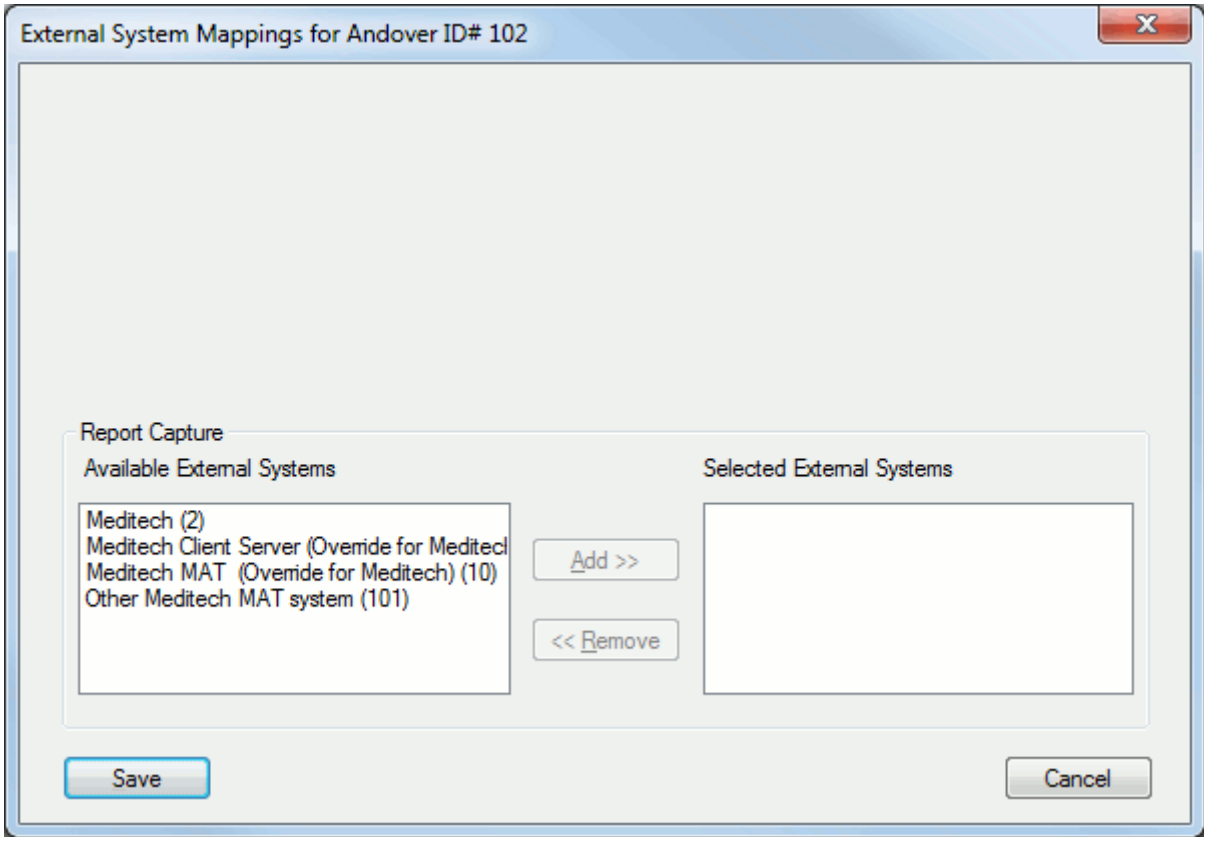
Note: See the **OnBase for Meditech with ODA** module reference guide for more information about configuring facilities for systems of record.

To configure facilities for Meditech systems, complete the following steps:

1. In the Configuration module, select **Medical** | **Facilities** | **Facility Configuration**.

Note: See the **HL7** module reference guide for more information on creating facilities.

2. Select a facility in the **Medical Facility** list, then click **External System**.
   The **External System Mapping for [Facility Name] ID# [Facility ID]** dialog box is displayed.



3. The **Report Capture** section determines which Meditech systems can make Report Capture requests. Add Meditech systems to the **Selected External Systems** list by selecting a Meditech system in the **Available External Systems** list and clicking **Add**.

   Meditech systems can be removed from the **Selected External Systems** list by selecting a Meditech system and clicking **Remove**.

Note: If no external systems are selected in the **Report Capture** section, the default Meditech external systems are used.

4. Click **Save** to finish.

Mapping Reports to Document Types

Each configured Document Type must be mapped to its corresponding Meditech report. Typically, this is performed during the configuration of your OnBase for Meditech solution. For more information, see the OnBase for Meditech documentation.

Also note that, when mapping Document Types to the Meditech report types listed below, you must create and use the appropriate Meditech mnemonics as the External Document Types (i.e., in the **External Document Types Mapping** dialog box).

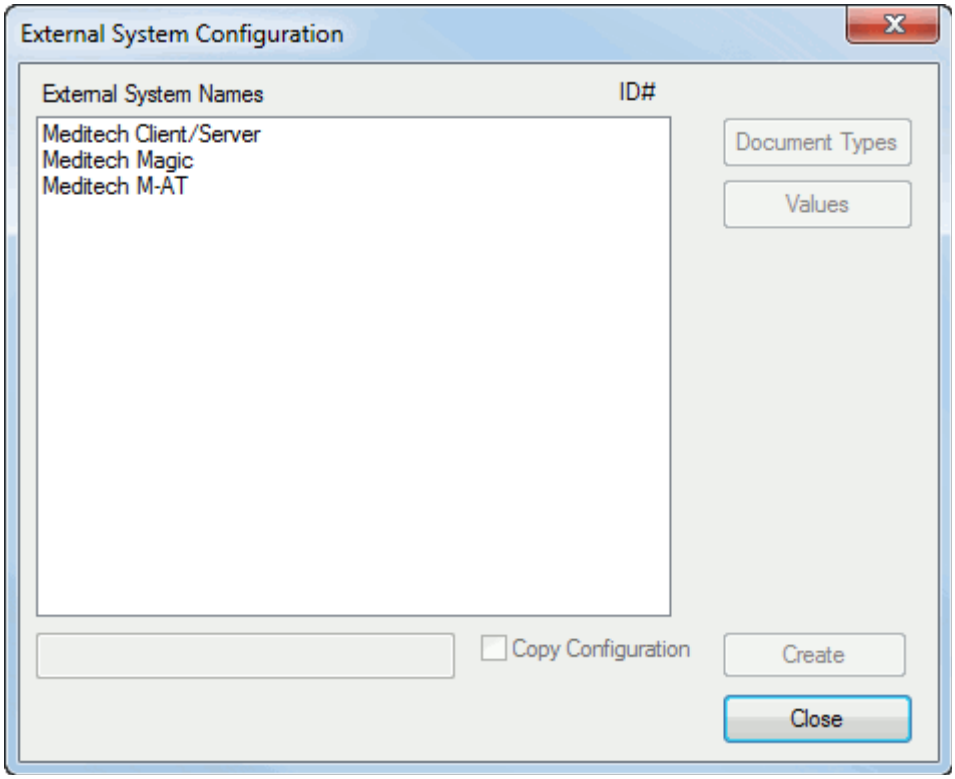
Meditech Report Type (configure an appropriate OnBase Document Type)	Meditech Mnemonic (set as External Document Type)
OE Inpatient Orders Summary Report	**MAPTONPRREPORT-ADMINORDS**
RAD Exam Report	**MAPTONPRREPORT-RADEXAM**
LAB Lab Specimen Inquiry Report	**MAPTONPRREPORT-LABSPEC**
BBK Lab Specimen Inquiry Report	**MAPTONPRREPORT-BBKSPEC**
MIC Lab Specimen Inquiry Report	**MAPTONPRREPORT-MICSPEC**
PATH Lab Specimen Inquiry Report	**MAPTONPRREPORT-PTHSPEC**

Mapping Keyword Types to Meditech Values

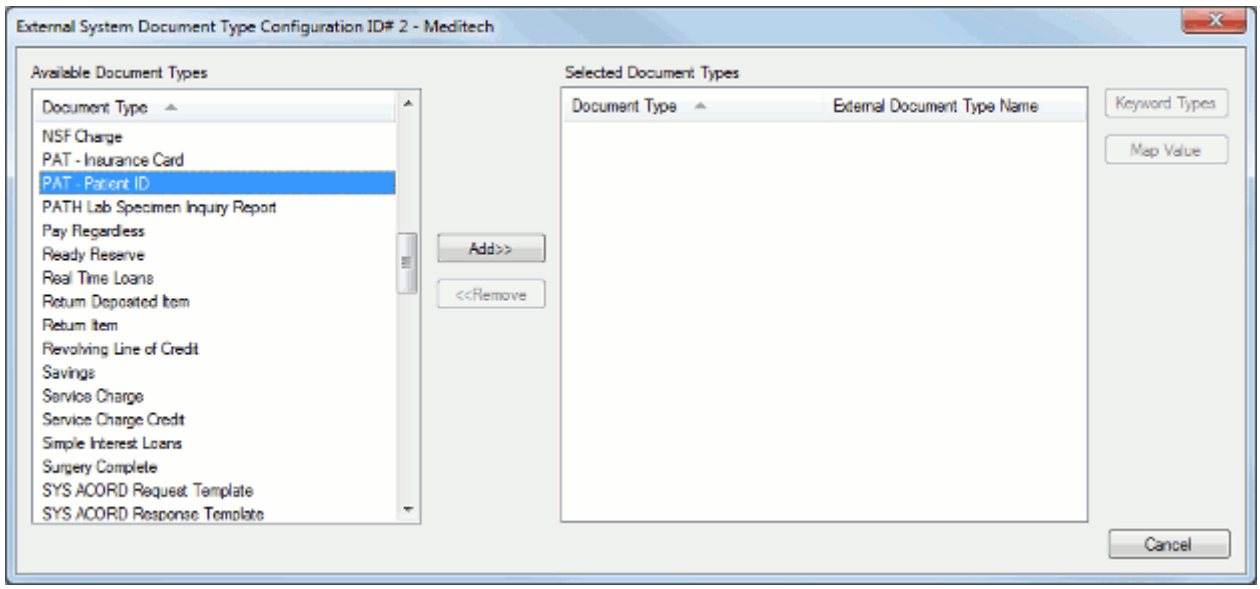
All required Meditech Keyword Types must be assigned to each Document Type configured for use with your Report Capture solution, and mapped to the appropriate Meditech value. The **Account Number** and **Medical Record Number** Keyword Types should already be assigned to the appropriate Document Types and mapped to the appropriate Meditech value. For more information on mapping these Keyword Types, see the OnBase for Meditech documentation.

To map the **Report URN** and **Report Mnemonic** Keyword Types to the correct Meditech values, follow these steps:

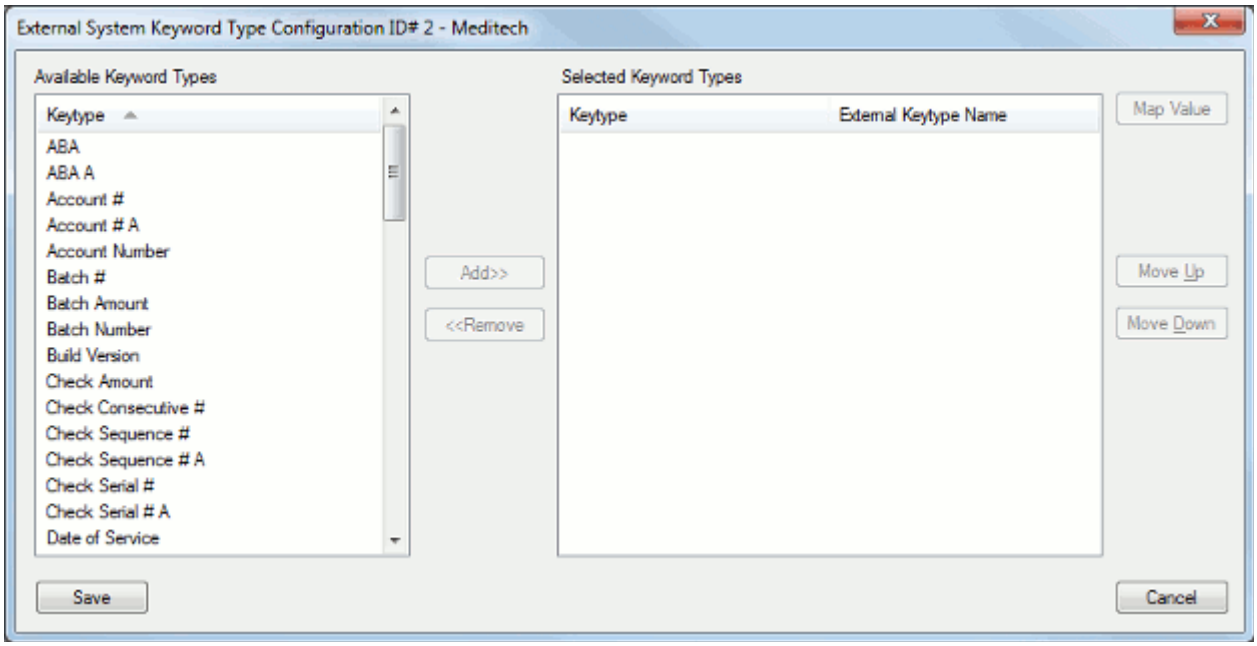
1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



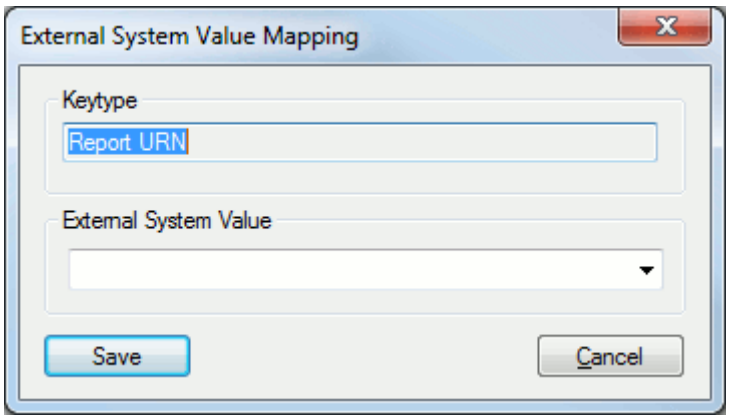
2. Select **Meditech Magic** and click **Document Types**. The **External System Document Type Configuration ID# 2 - Meditech Magic** dialog is displayed.



3. Select a Document Type from the **Selected Document Types** list, then click **Keyword Types**. The **External System Keyword Type Configuration ID# 2 - Meditech Magic** dialog box is displayed.



4. Select the required Keyword Type (i.e., **Report URN** or **Report Mnemonic**) from the **Available Keyword Types** list, then click **Add>>** to move it to the **Selected Keyword Types** list.
5. Select the required Keyword Type (i.e., the Keyword Type you selected in the previous step) from the **Selected Document Types** list, then click **Map Value**. The **External System Value Mapping** dialog box is displayed.



6. Type the appropriate value into the **External System Value** field, then click **Save**.
   - For a **Keytype** of **Report URN**, type **RptUrn**.
   - For a **Keytype** of **Report Mnemonic**, type **RptMnemonic**.
7. Click **Save** to return to the **External System Configuration** dialog.

8. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT,** as appropriate, and click **Document Types**. Then repeat steps 3 to 7.

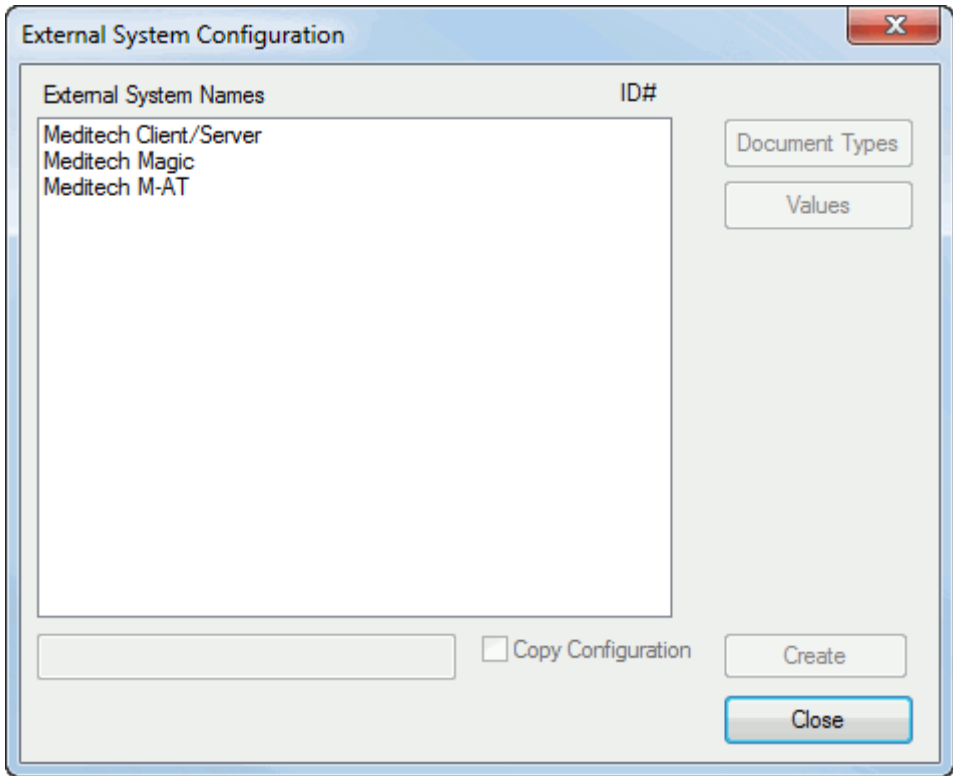
Note: While the **Meditech Client/Server** and **Meditech M-AT** options inherit the **Key**-**Value** pair settings of the **Meditech Magic** option by default, they do not inherit the Document Type mappings of the **Meditech Magic** option. You must manually map the Document Types for each override option you wish to use (as outlined in steps 3 to 7 above), even if you wish to maintain the same Document Type mappings you configured for the **Meditech Magic** option.

Configuring Multiple External System Parameters

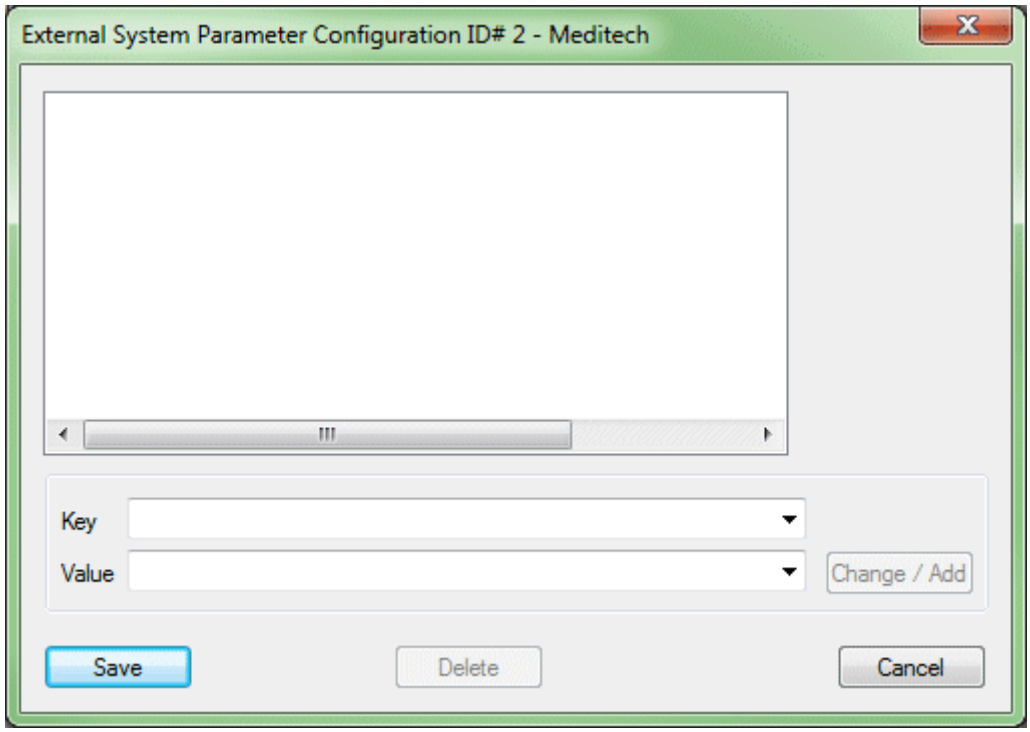
The sections above outline the procedures for configuring individual settings for your Report Capture for Meditech solution. Once you are familiar with these settings and how they impact your solution, you may wish to configure many or all of these settings at the same time.

To configure multiple settings at once, follow these steps:

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

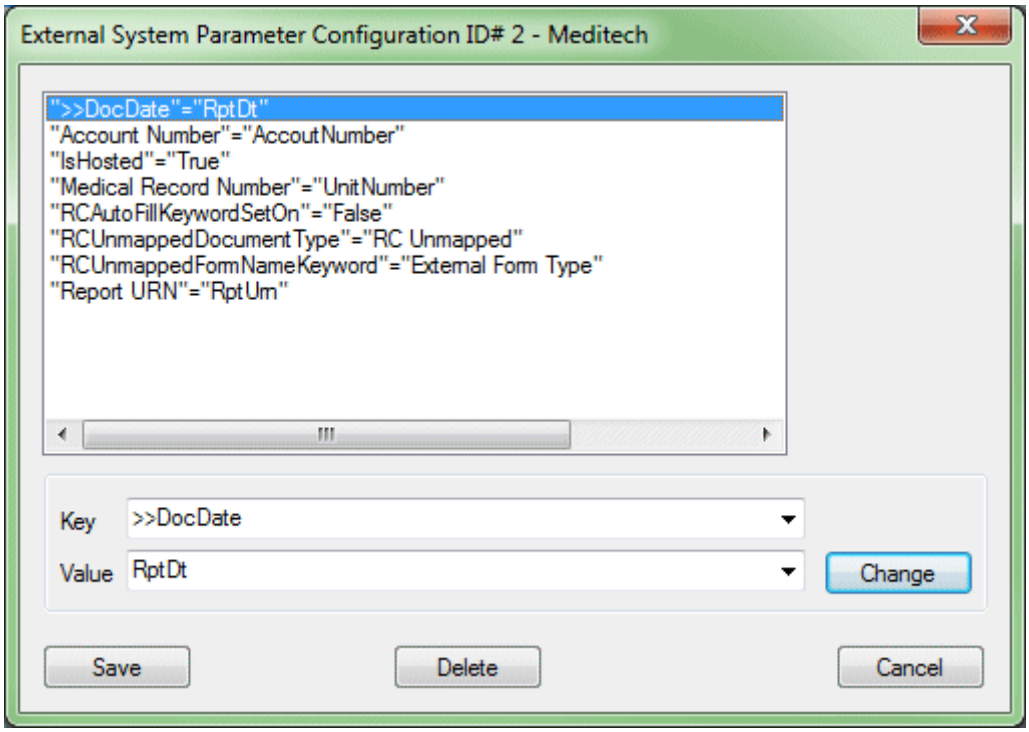


2. Select the **Meditech Magic** external system entry, then click **Values**. The **External System Parameter Configuration <External System ID> - <External System Name>** dialog box is displayed.



3. Type an appropriate OnBase-related value (e.g., an OnBase Document Type or Keyword Type) in the **Key** field.
4. Type the corresponding external system-related value (e.g., a Meditech Document Type or Keyword Type) in the **Value** field.
5. Click **Add**. The **Key**-**Value** pair is displayed in the top field of the dialog box.

6. Repeat steps 3 to 5 until you have added all desired **Key**-**Value** pairs.



7. Click **Save** to return to the **External System Configuration** dialog box.
8. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 3 to 7.

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

Configuring User Privileges

To grant a user group permission to access the **Report Capture Administration** window in the Unity Client, follow these steps:

1. Open the OnBase Configuration module.
2. Select **Users | User Groups / Rights**.
3. Click **Product Rights**.
4. Select the **Report Capture** option in the **Administrative Privileges** section.
5. Click **Save**.

Configuring File Encryption

By default, your Report Capture solution is configured to encrypt and decrypt files during the printing process for additional file security. Printed files are encrypted when they leave Meditech and enter the temporary storage directory, and are decrypted once they are imported into OnBase.

If you want to disable file encryption, follow these steps:

1. Open the **Hyland.Applications.ReportCapture.RCImporterSvc.exe.config** file using a text editor such as Notepad.
2. Set the value of the **EnableEncryption** setting to **false**.
3. Save and close the **Hyland.Applications.ReportCapture.RCImporterSvc.exe.config** file.

Note: In order for your changes to take effect, you must restart the Report Capture Importer service.

Accessing the Report Capture Files

To access the Report Capture files generated during the printing process, you must locate the temporary storage directory for these files. By default, the files are deposited in the **backup** and **primary** folders in one of the following locations:

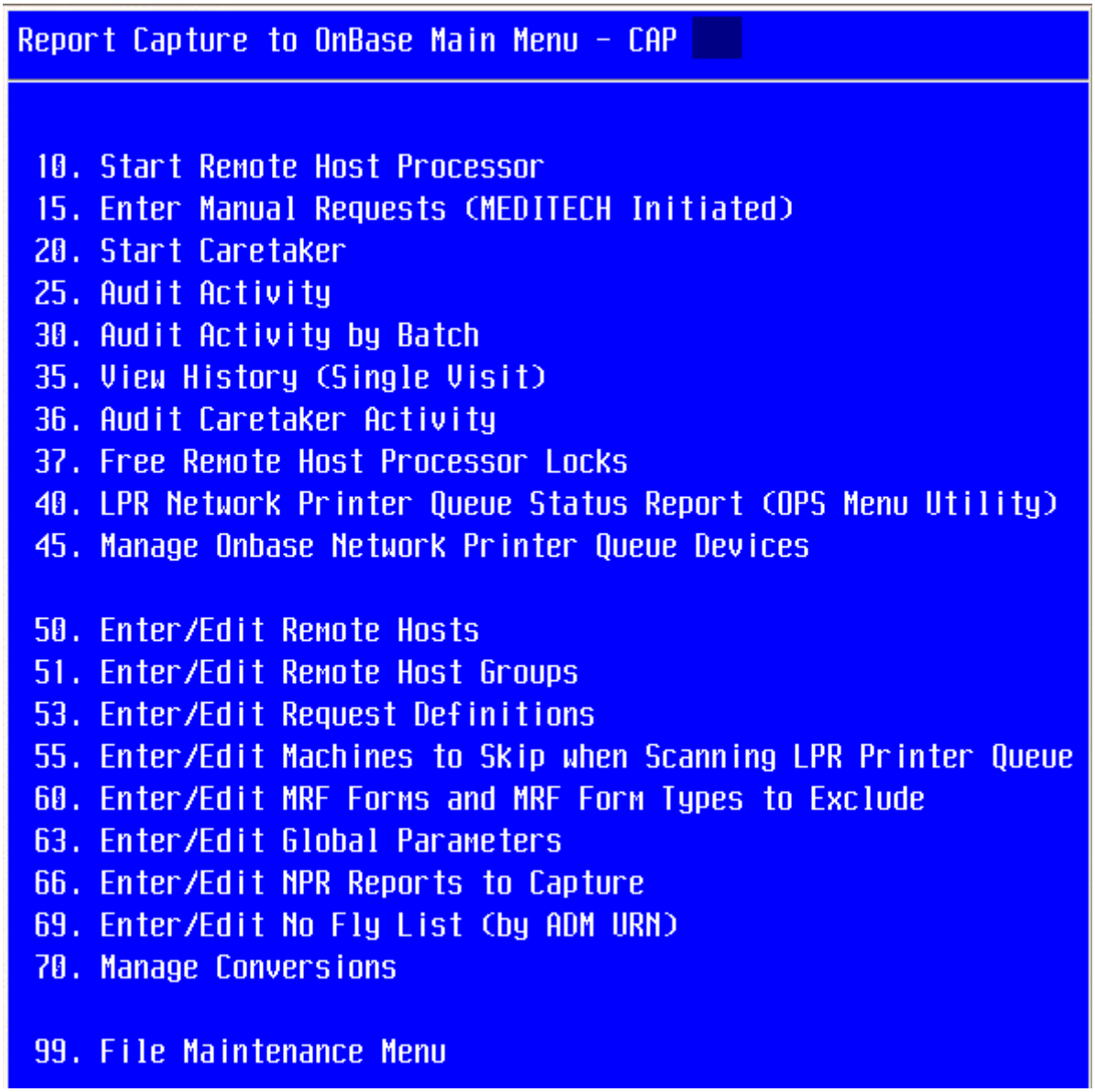
- **C:\Program Files\Hyland\Report Capture** (in a 32-bit environment)
- **C:\Program Files (x86)\Hyland\Report Capture** (in a 64-bit environment)

In addition to the printed Meditech reports, metadata files can also be found in these temporary storage folders. The different types of files can be easily identified by the following extensions:

- **.pcl:** Printed content file
- .**rcbh:** Report Capture batch header (metadata file)
- **.rcbt:** Report Capture batch trailer (metadata file)
- **.rcrh:** Report Capture request header (metadata file)
- **.rcrt:** Report Capture request trailer (metadata file)

Meditech Magic Configuration

To manage your Report Capture solution from your Meditech Magic system, log on to Meditech and bring up the main menu. From there, select the **Report Capture System Main Menu** option. The **Report Capture to OnBase Main Menu - CAP** will be displayed:



From this menu, you will be able to audit your system and perform some basic troubleshooting.

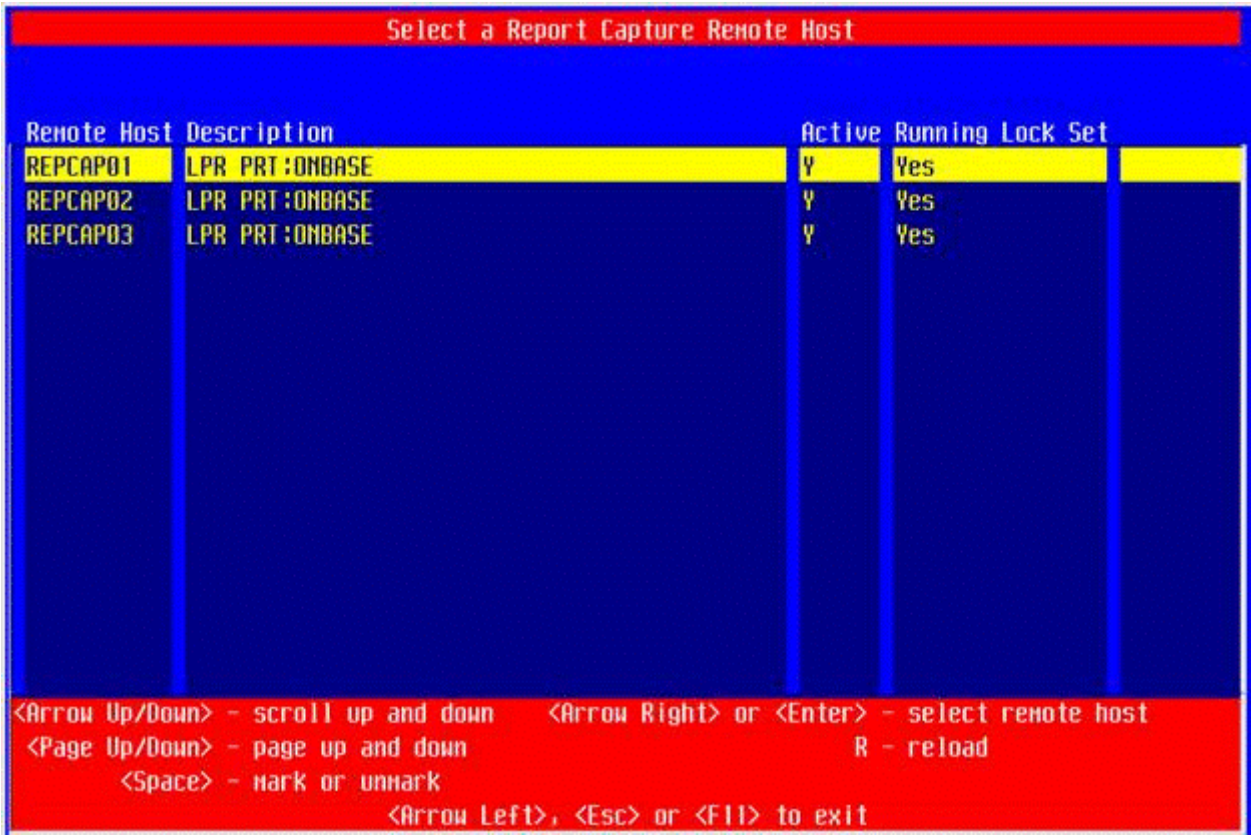
See the following sections for information on each available option:

- **Start Remote Host Processor** - see Starting a Remote Host Processor on page 71.
- **Enter Manual Requests (MEDITECH Initiated)** - see Printing Documents to OnBase on page 96.

- **Start Caretaker** - See The Remote Host Caretaker on page 71.
- **Audit Activity** - see Viewing Audit Logs on page 74.
- **Audit Activity by Batch** - see Viewing Audit Logs by Batch on page 75.
- **View History (Single Visit)** - see Viewing Audit Logs for Patient Visits on page 77.
- **Audit Caretaker Activity -** see Viewing Caretaker Audit Logs on page 79.
- **Free Remote Host Processor Locks** - see Removing Processor Locks on page 79.
- **LPR Network Printer Queue Status Report (OPS Menu Utility)** - see Viewing the Printer Queue on page 81.
- **Manage Onbase Network Printer Queue Devices** - see Managing Printer Queues on page 82.
- **Enter/Edit Remote Hosts** - see Configuring Remote Hosts on page 83.
- **Enter/Edit Remote Host Groups** - see Configuring Remote Host Groups on page 84.
- **Enter/Edit Request Definitions** - see Defining a Group of Reports to be Processed on page 85.
- **Enter/Edit Machines to Skip when Scanning LPR Printer Queue** - see Skipping Machines When Scanning LPR Queues on page 87.
- **Enter/Edit MRF Forms and MRF Types to Exclude** - see Excluding Specific Documents on page 87.
- **Enter/Edit Global Parameters** - see Purging Audit Logs on page 90.
- **Enter/Edit NPR Reports to Capture** - see Configuring NPR Reports on page 89.
- **Enter/Edit No Fly List (by ADM URN)** - for more information about using the No Fly list for conversions, contact your solution provider.
- **Manage Conversions** - for information on managing conversions, contact your solution provider.
- **File Maintenance Menu** - see Purging Audit Logs on page 90.

Starting a Remote Host Processor

You can view and start previously configured remote host processors by selecting **Start Remote Host Processor**. The **Select a Report Capture Remote Host** window is displayed:



For more information on configuring new and existing remote hosts, see Configuring Remote Hosts on page 83.

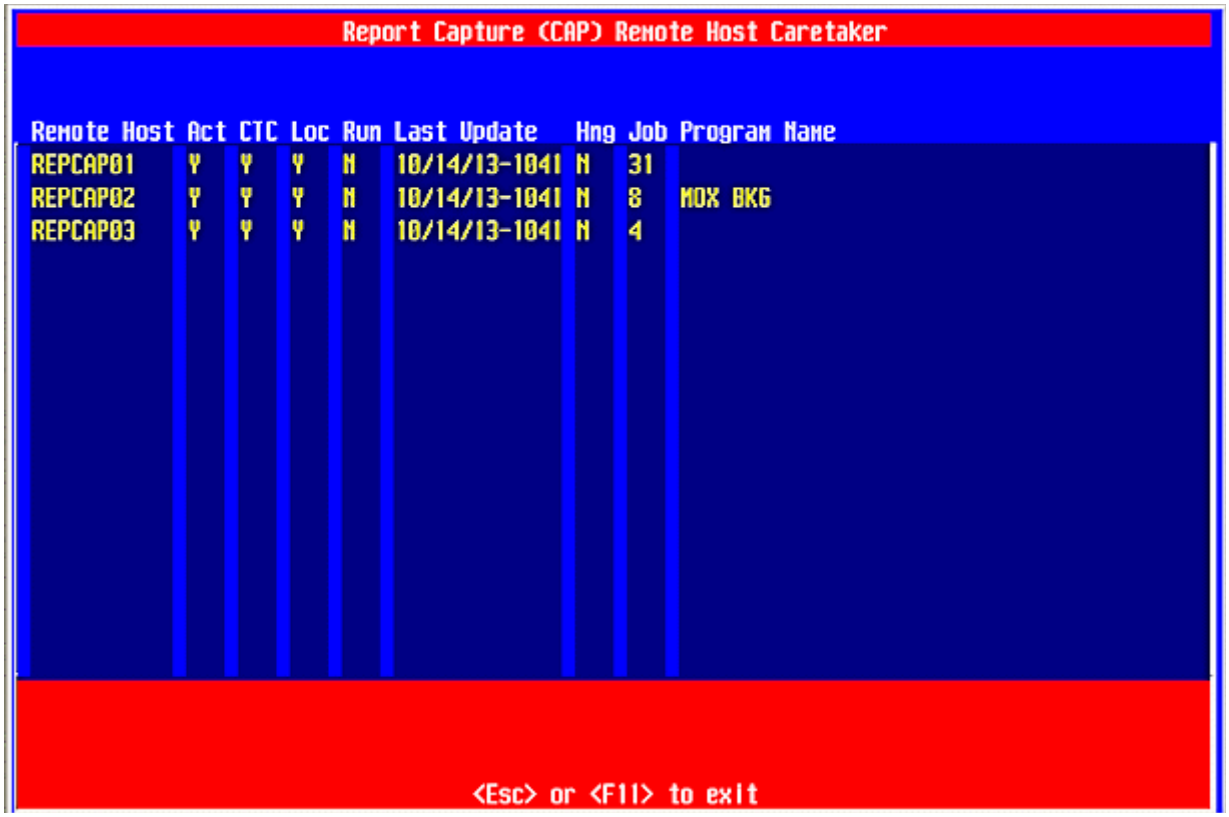
The Remote Host Caretaker

The Remote Host Caretaker utility can monitor remote hosts, ensure that remote hosts are running, and restart remote hosts automatically if they close or become hung.

To allow the Remote Host Caretaker utility to manage a remote host, make sure that the remote host is active and that it is configured with the **Can be Controlled by the Remote Host Caretaker** option enabled. See Configuring Remote Hosts on page 83 for more information about configuring remote hosts.

Monitoring the Status of Remote Hosts

The Remote Host Caretaker displays status information about the remote hosts it manages. To launch the Remote Host Caretaker, go to the **Report Capture to OnBase Main Menu - CAP** and select the **Start Caretaker** option. The Remote Host Caretaker is displayed.



The following information is displayed by the Remote Host Caretaker:

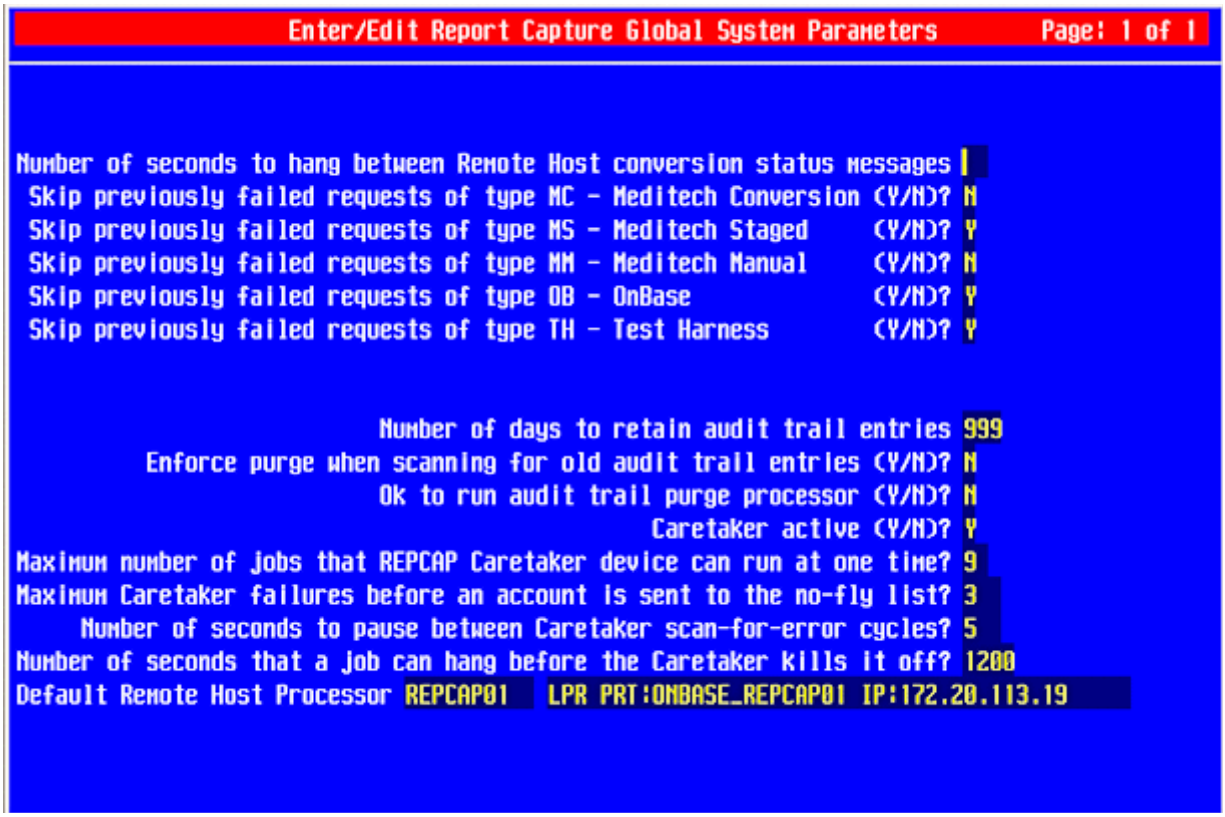
- **ACT** - indicates whether or not the remote host is configured as active.
- **CTC** - indicates whether or not the remote host is configured with the Can be Controlled by the Remote Host Caretaker option enabled.
- **Loc** - indicates whether or not the remote host is locked.
- **Run** - indicates whether or not the remote host is running.
- **Last Update** - displays the last time the Remote Host Caretaker successfully received a response from the remote host.
- **Hng** - indicates whether or not the remote host is hanging.
- **Job** - displays the Meditech job number.
- **Program Name** - displays the Meditech program name.

Note: To allow a remote host to be controlled by the Remote Host Caretaker, it must be configured as active and it must have the **Can be Controlled by the Remote Host Caretaker** option enabled.

Configuring Global Parameters for the Remote Host Caretaker

Several global parameters related to the Remote Host Caretaker can be configured in the **Enter/Edit Report Capture Global System Parameters** dialog box. To configure these parameters, complete the following steps:

1. From the **Report Capture to OnBase Main Menu - CAP**, select the **Enter/Edit Global Parameters** option. The **Enter/Edit Report Capture Global Parameters** dialog box is displayed.



2. Set the **Caretaker** active option to **Y** to activate the Remote Host Caretaker.
3. Set the **Maximum number of jobs that REPCAP Caretaker device can run at one time** to the maximum number of remote hosts that the Caretaker can run.
4. Set the **Number of seconds to pause between Caretaker scan-for-error cycles** option to the number of seconds the Caretaker should wait between pinging remote hosts to check their status.
5. Set the **Number of seconds that a job can hang before the Caretaker kills it off** option to the number of seconds the Caretaker should wait to restart a remote host if the Caretaker determines the remote host is hung.

Configuring the Remote Host Caretaker as a Scheduled Task

In order for the Remote Host Caretaker to run automatically, it must be configured as a scheduled task in the Windows Task Scheduler.

To create a scheduled task, click **Start** on the Windows desktop, then select **All Programs** | **Accessories** | **System Tools** | **Task Scheduler**. Click **Create Task...** to create a new scheduled task, then configure the task as necessary.

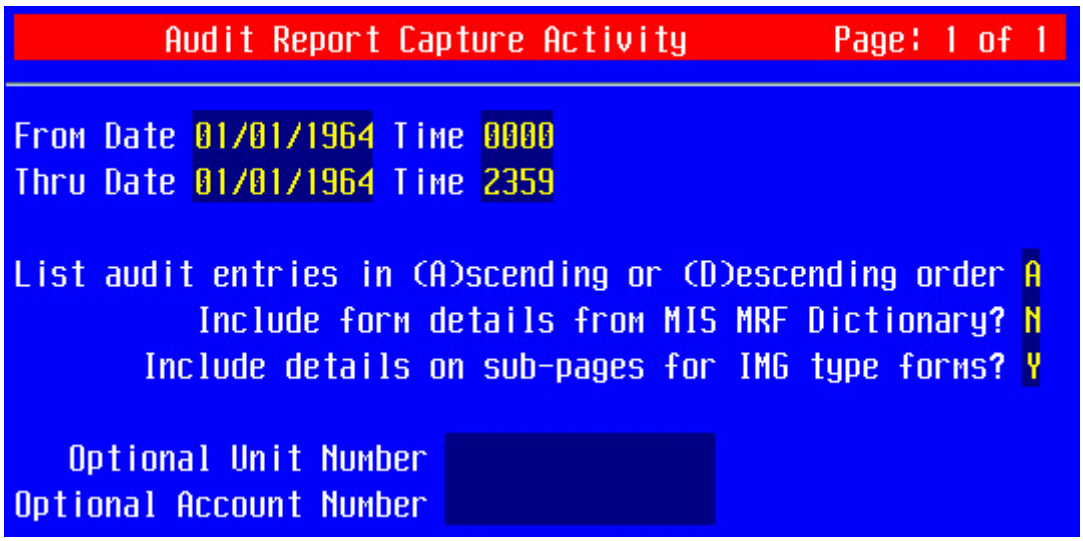
When creating the action that will occur when the task starts, you must enter or browse to the location of your Meditech Magic executable file in the **Program/script** field. After entering the executable location, enter a space, then add the word **CARETAKER** to the end of the field. This will start the Remote Host Caretaker utility when the task executes.

It is recommended that you configure the task to be triggered daily and that it is repeated every minute for 24 hours.

Tip: Consult the Windows Help files or contact your first line of support for assistance with using the Task Scheduler to create a scheduled task.

Viewing Audit Logs

Select the **Audit Activity** option to view an audit trail of all documents that have been sent to OnBase. The **Audit Report Capture Activity** window will be displayed:

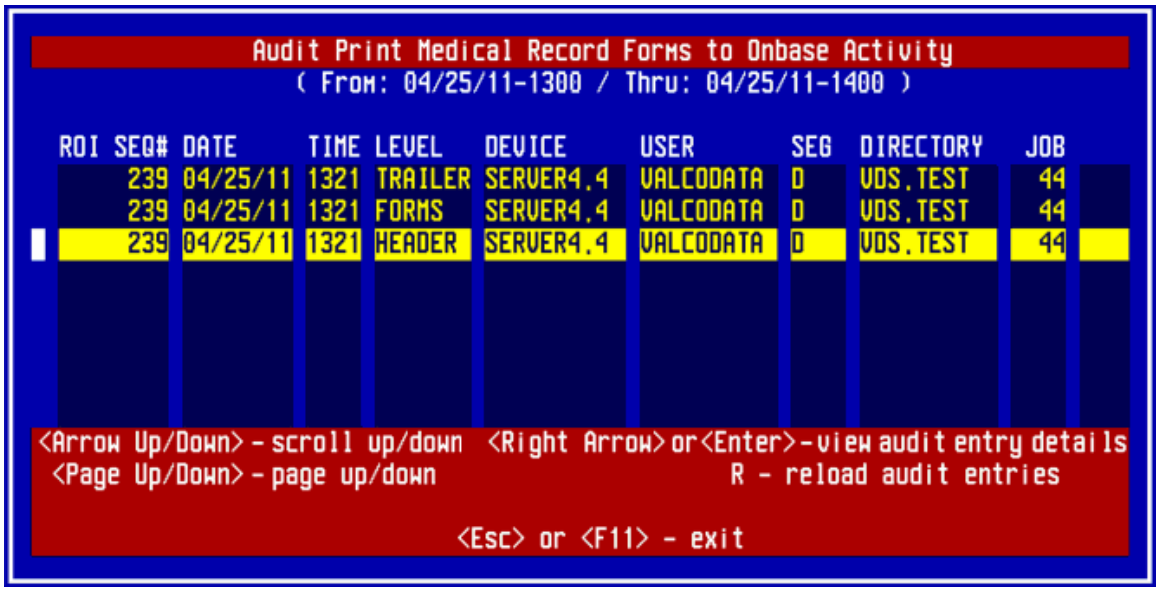


Select a date range and all necessary options:

- **List audit entries in (A)scending or (D)escending order** - enter **D** in this field to sort the audit log by descending order (i.e., the most recent document will be listed first), or enter **A** in this field to sort the audit log by ascending order (i.e., the oldest document will be listed first).
- **Include form details from MIS MRF Dictionary** - if you enter **Y** in this field, additional information on the Meditech Forms will be displayed on the audit form report.
- **Include details on sub-pages for IMG type forms** - this option is only maintained for legacy purposes. You should not change this option unless directed to do so by your solution provider.

- **Optional Unit Number -** Enter a patient's MRN in this field to only locate entries related to that patient. If you do not know the patient's MRN, you can press **F9** to perform a lookup.
- **Optional Account Number -** Enter a specific visit number in this field to only locate entries related to that patient. If you do not know the visit number you are looking for, you can press **F9** to perform a lookup.

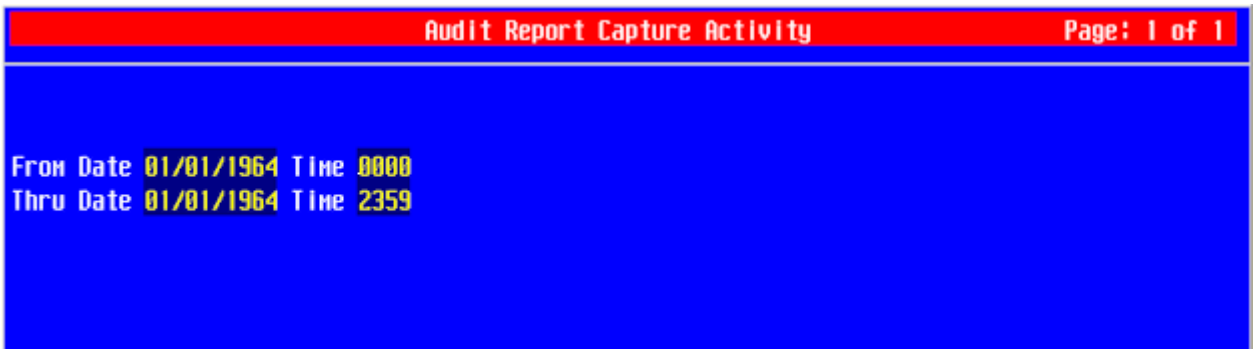
After specifying all desired options, press the **F12** key to create and view your audit report.



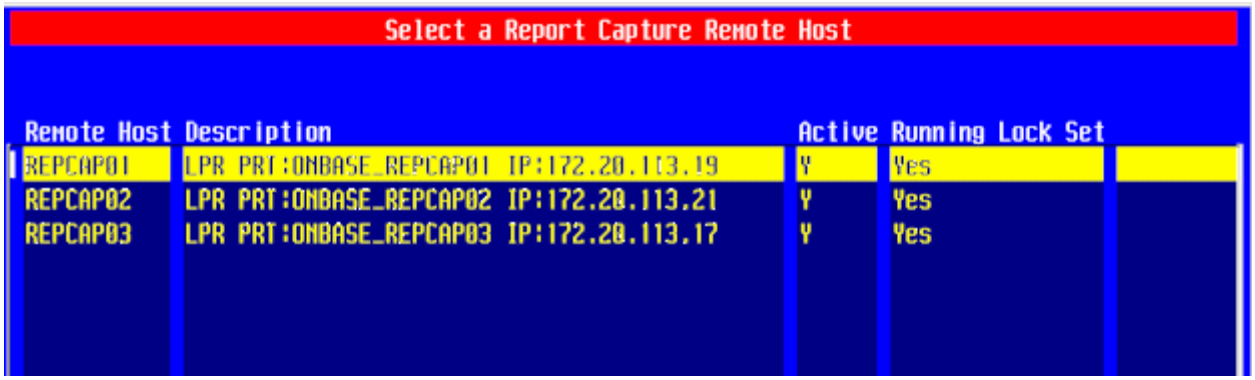
The audit report will contain three components for each document that has been sent to OnBase - the **Header**, **Forms**, and **Trailer**. The **Header** and **Trailer** components help identify and separate the printed document, while the **Forms** component contains the actual document information itself. Components with the same **ROI Sequence #** are related to each other. If you wish to view additional details for a specific entry, select that entry and press **Enter**.

Viewing Audit Logs by Batch

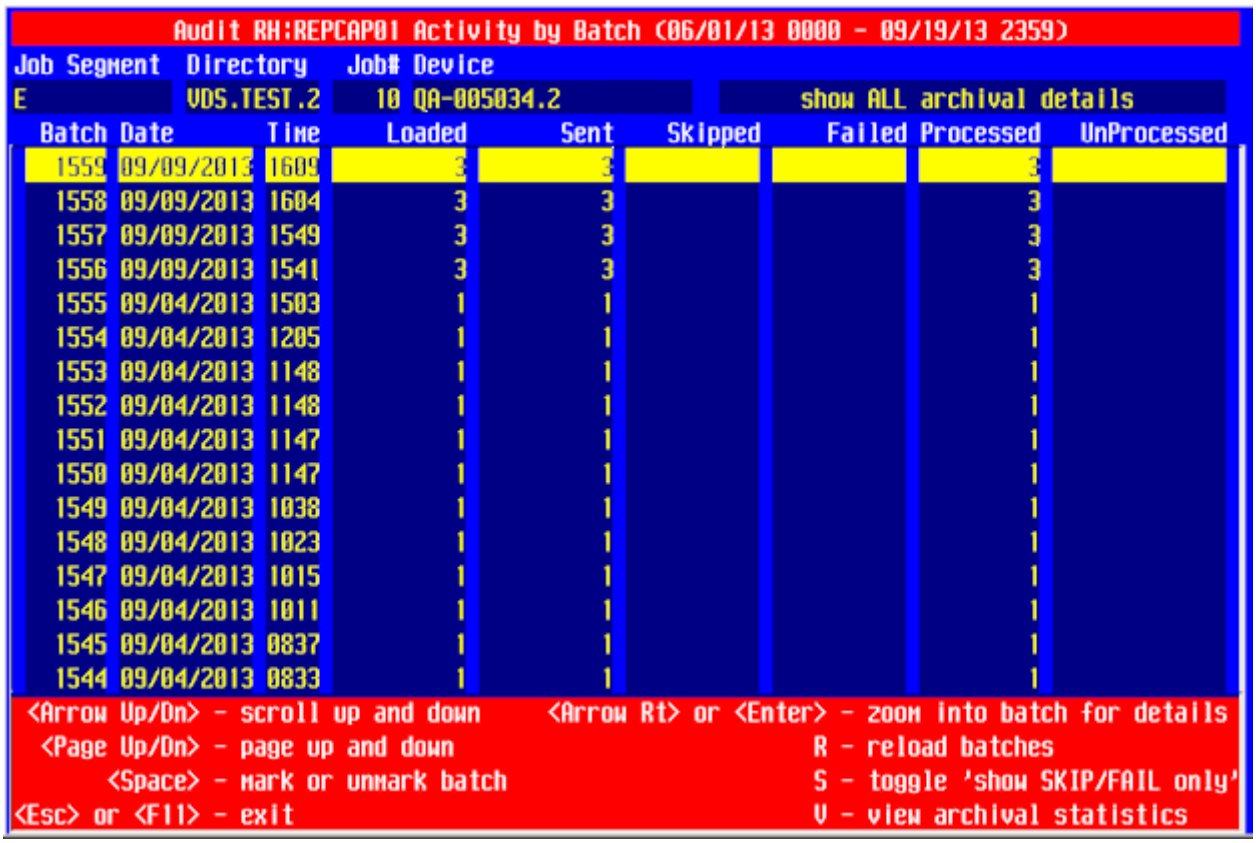
Select the **Audit Activity by Batch** option to view an audit trail of batches that have been sent to OnBase. The **Audit Report Capture Activity** window will be displayed:



Enter a date range for the batches you wish to view in the audit trail, and then press the **F12** key to file the information. The **Select a Report Capture Remote Host** window will be displayed:



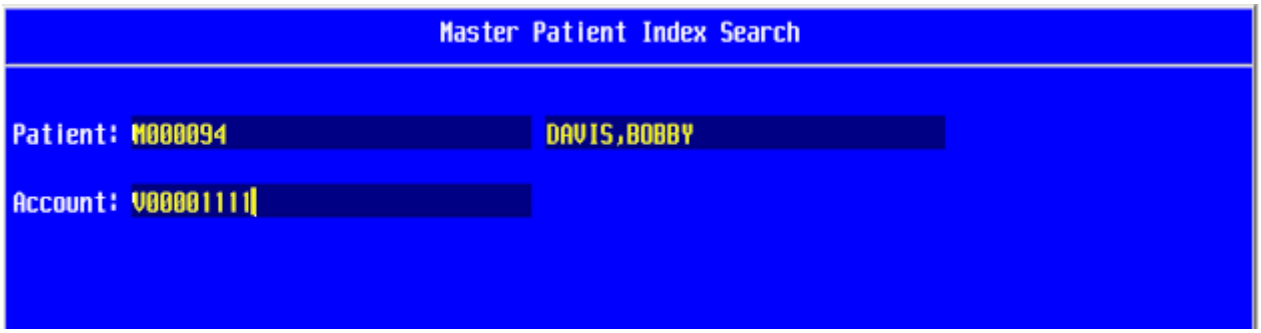
Select the desired remote host from the list and press **Enter** to create and view your audit report.



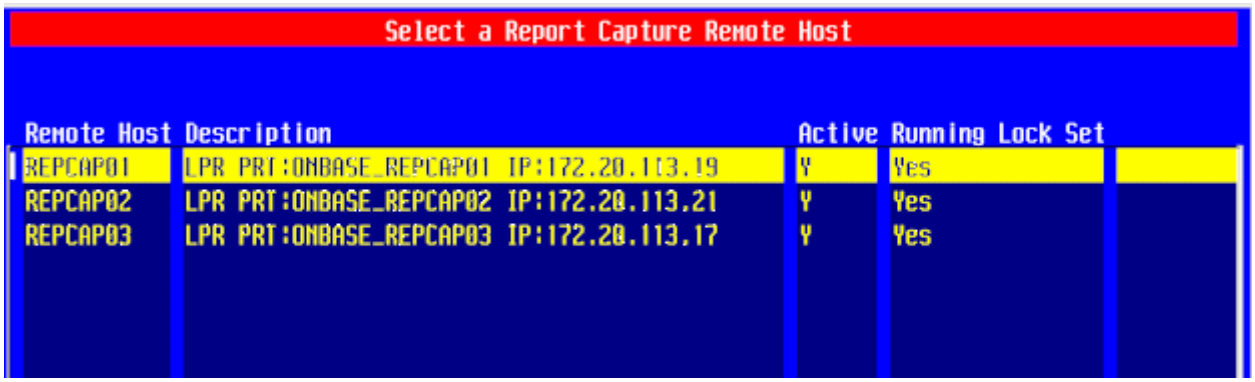
The audit report will show each batch in the specified date range for the selected remote host. If you wish to view additional details for a specific batch, select that batch and press **Enter**.

Viewing Audit Logs for Patient Visits

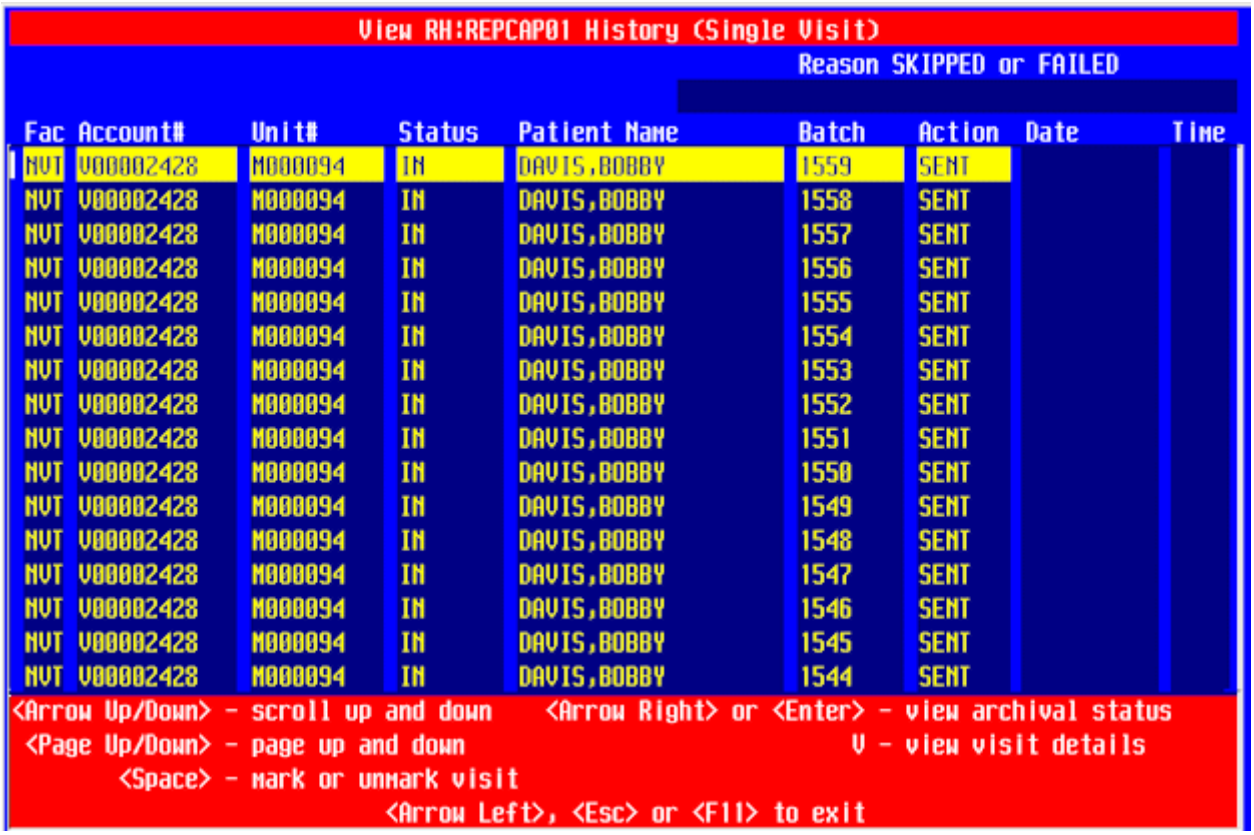
Select the **View History (Single Visit)** option to view an audit trail of individual patient visits that have been sent to OnBase. The **Master Patient Index Search** window will be displayed:



Enter the appropriate identification information for the patient whose visits you wish to view in the audit trail, and then press the **F12** key to file the information. The **Select a Report Capture Remote Host** window will be displayed:



Select the desired remote host from the list and press **Enter** to create and view your audit report.

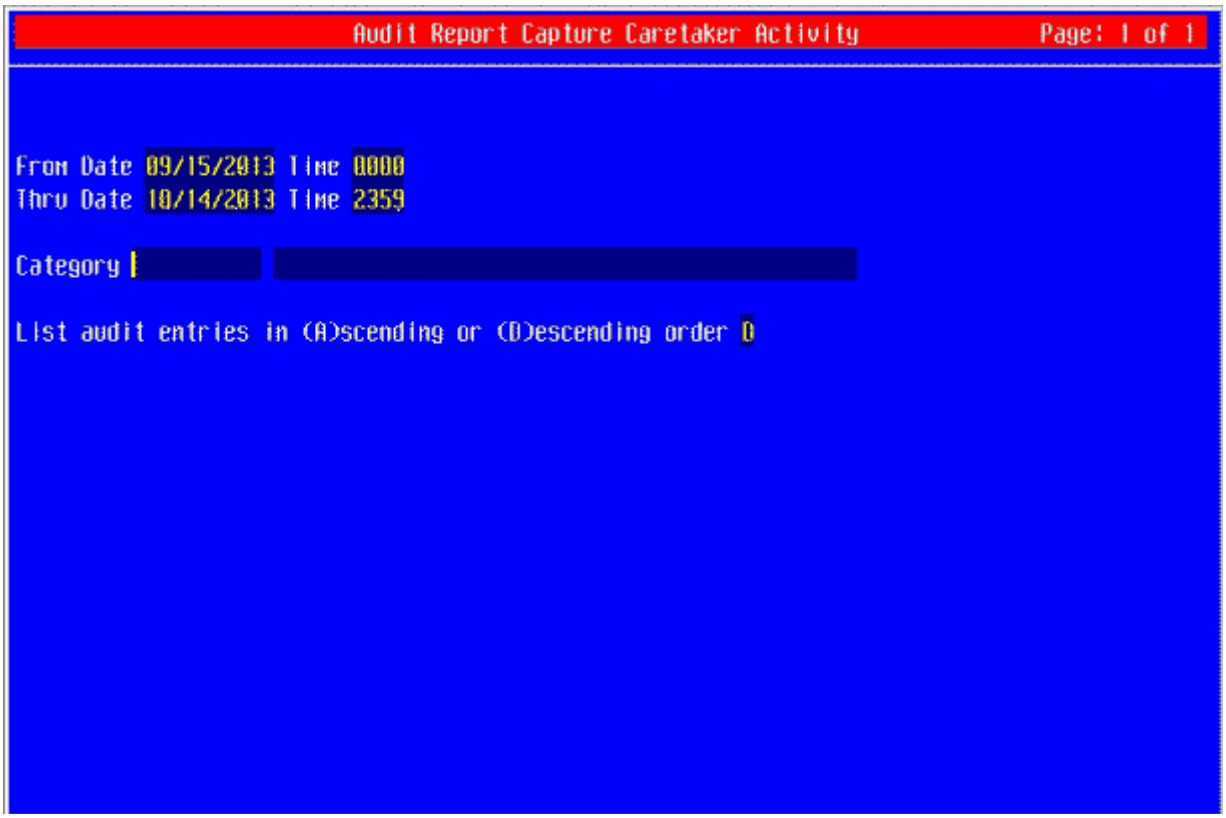


The audit report will show each individual visit for the specified patient and the selected remote host. If you wish to view additional details for a specific visit, select that visit and press **Enter**.

Viewing Caretaker Audit Logs

To view log information for the Remote Host Caretaker, follow these steps:

1. Navigate to the **Report Capture to OnBase Main Menu - CAP** and select the **Audit Caretaker Activity** option. The **Audit Report Capture Caretaker Activity** dialog box is displayed.



2. Enter a date and time range to view Caretaker activity within the specified range.
3. Choose a category to narrow the message types displayed in the log. Press F9 to perform a lookup of available categories.

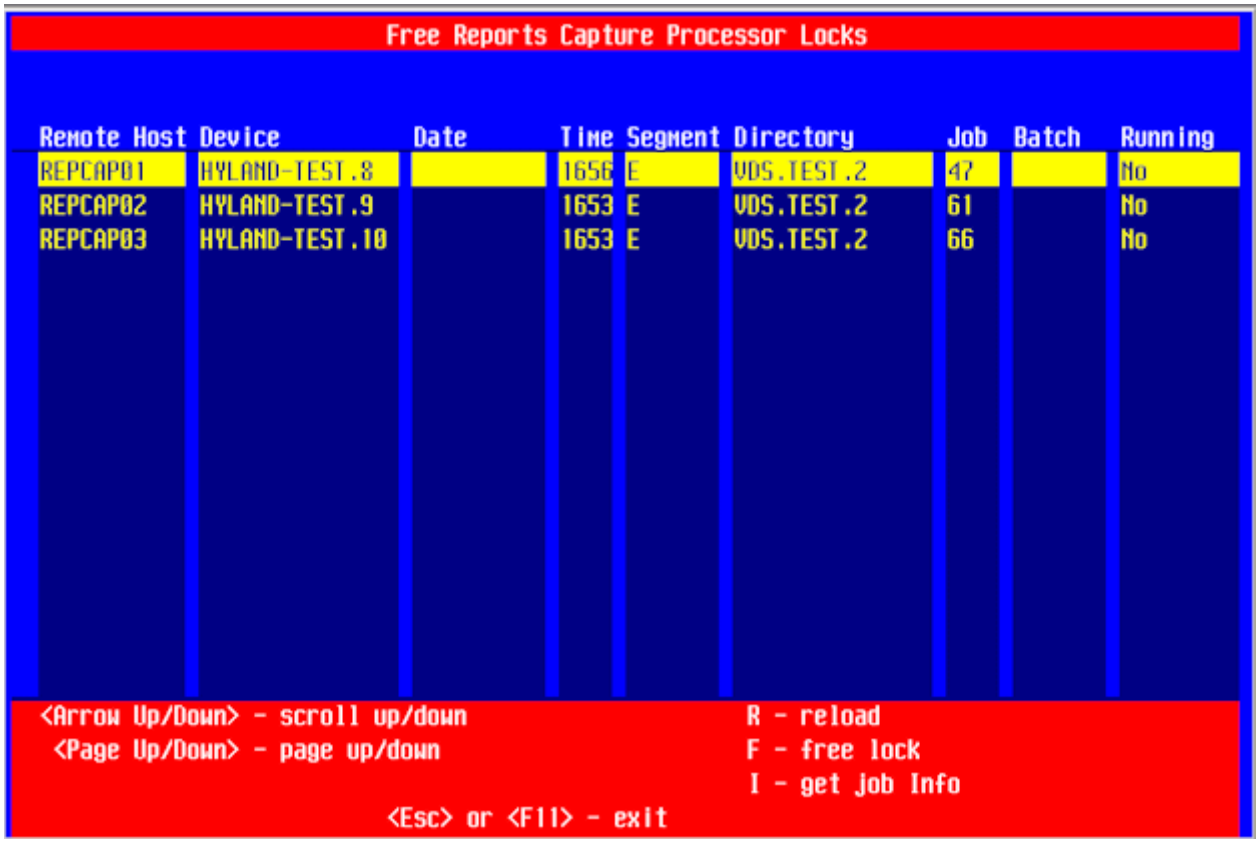
   If no category is selected, all message types are displayed in the log.
4. In the **List audit entries in (A)scending or (D)escending order** field, enter **A** to list entries in ascending order (i.e., the oldest entry will be listed first), or enter **D** to list audit entries in descending order (i.e., the most recent entry will be listed first).
5. To view a log based on the specified parameters, press **F12**. The audit log is displayed.

Removing Processor Locks

When a workstation is processing a document for OnBase, a processor lock will be created to ensure the security and accuracy of the processed document.

If a user's workstation crashes while it is processing documents for OnBase, that workstation's processor lock may not be properly released. As long as the processor lock exists, other users will be unable to process documents for OnBase.

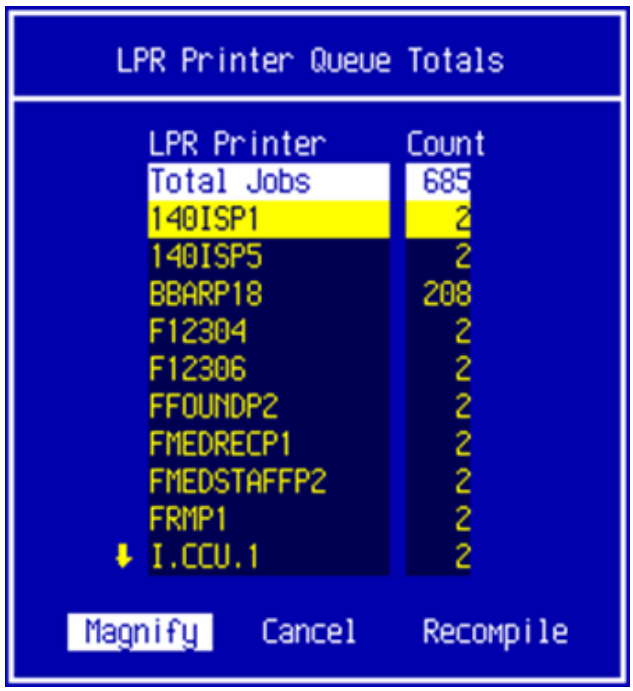
To resolve this problem, you should navigate to the **Report Capture to OnBase Main Menu - CAP** and select the **Free Remote Host Processor Locks** option.



Any current and pending processor locks will be displayed on this screen. The processor lock that is currently in effect is displayed at the top of the list. To remove a processor lock, select the lock and press **F**.

Viewing the Printer Queue

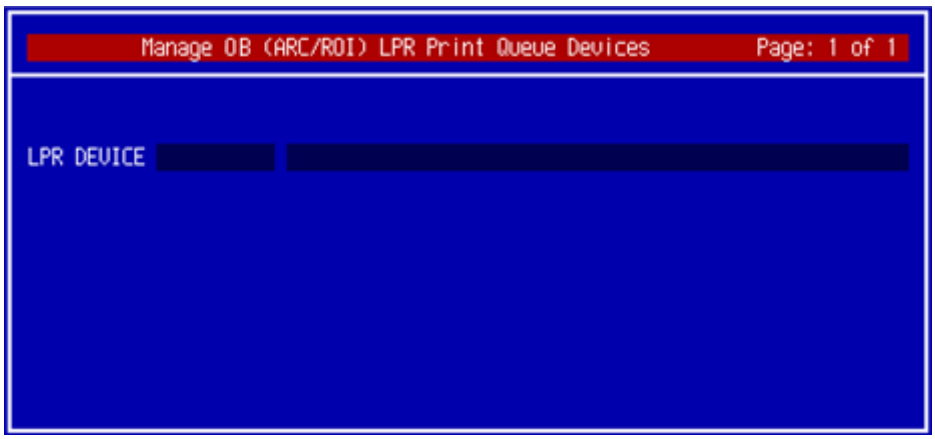
You can view the status of all printer queues that are currently in use by selecting the **LPR Network Printer Queue Status Report (OPS Menu Utility)** option. The **LPR Printer Queue Totals** window is displayed:



The **LPR Printer** column displays the name of each LPR device in the network which is currently being used, and the **Count** column contains the number of documents that are currently in the queue for each of those devices. The Hyland LPR Print device is typically named **ONBASE_RPT_CAP**.

Managing Printer Queues

You can also clear the **ONBASE_RPT_CAP** printer queue if any the queue contains any orphaned files. To do so, select the **Manage Onbase Network Printer Queue Devices** option. The **Manage Onbase Network Printer Queue Devices** window is displayed:



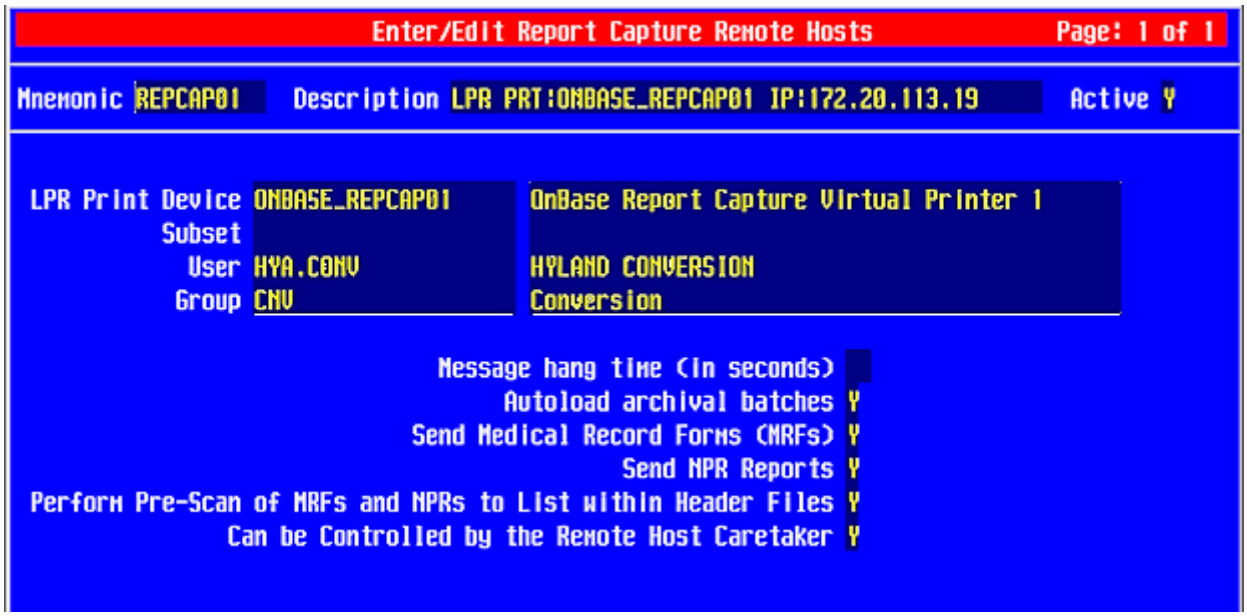
To check current status of the **ONBASE_RPT_CAP** printer queue, follow these steps:

1. Press **F9** to perform a lookup of LPR print devices.
2. Select the LPR Device that is associated with your Report Capture system.
3. Press **F12**. The **File** prompt will be displayed.
4. Enter **Y**. All orphaned files will be displayed on this screen.
5. You can clear any orphaned files by pressing the **F** key and following the on-screen prompts.

Configuring Remote Hosts

You can configure multiple hosts for use with your Report Capture solution. To configure a remote host, follow these steps:

1. Select the **Enter/Edit Remote Hosts** option. The **Enter/Edit Report Capture Remote Hosts** window is displayed:



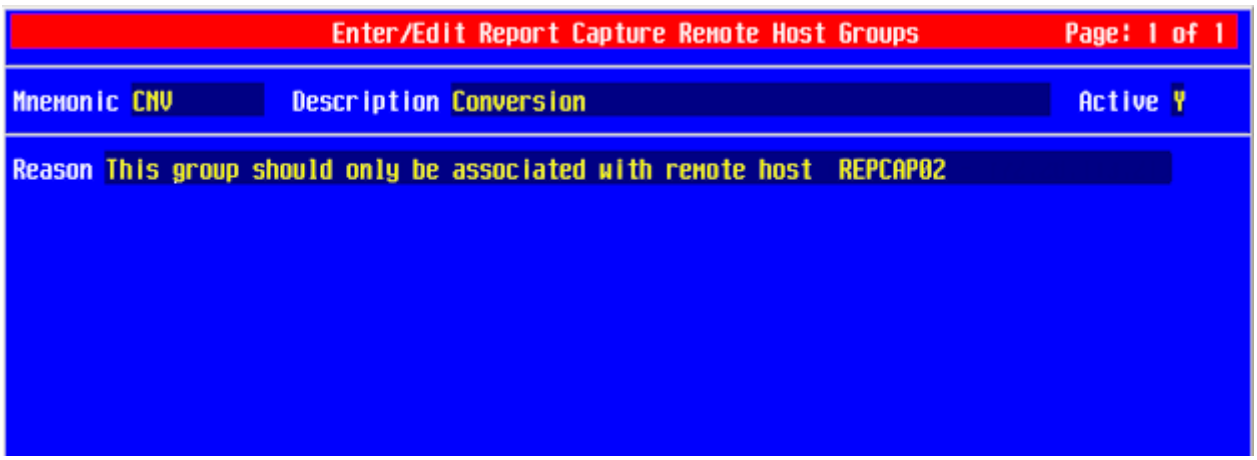
2. Enter a descriptive mnemonic for your Report Capture remote host in the **Mnemonic** field.
3. Enter a description for your Report Capture remote host in the **Description** field.
4. Enter **Y** in the **Active** field.
5. Enter a LPR printer in the **LPR Print Device** field. If you don't know the name of the printer you are searching for, you can press **F9** to perform a lookup to select from a list of available host machines.
6. Enter the code associated with the subset of reports that you would like to be printed in the **Subset** field. If you don't know the code for the subset you want to use, you can press **F9** to perform a lookup to select from a list of active subsets.
7. Enter the name of the user being used by the remote host in the **User** field. If you don't know the name of the user are searching for, you can press **F9** to perform a lookup to select from a list of available users.
8. Enter the name of the remote host group you wish to assign the remote host to in the **Group** field. For more information on creating remote host groups, see Configuring Remote Host Groups on page 84.
9. Enter a hang time in the **Message hang time (in seconds)** field. Any system messages that occur during a Report Capture process will be displayed for the configured amount of seconds.
10. Enter **Y** in the **Autoload archival batches** field.

11. Enter **Y** in the **Send Medical Record Forms (MRFs)** field if you want to send MRFs to be processed by this remote host.
12. Enter **Y** in the **Send NPR Reports** field if you want to send NPRs to be processed by this Remote Host.
13. Enter **Y** in the **Perform Pre-Scan of MRFs and NPRs to List within Header Files** field if you want to include a list of all documents being printed in the header files included with the Report Capture request.
14. Enter **Y** in the **Can be Controlled by the Remote Host Caretaker** field if you want this remote host to be managed by the Remote Host Caretaker. In order for the remote host to be managed by the Remote Host Caretaker, the remote host must also be configured as active.
15. Press the **F12** key, then enter **Y** to the prompts that are displayed. Your remote host configuration is saved and can be used by the Report Capture processor.

Configuring Remote Host Groups

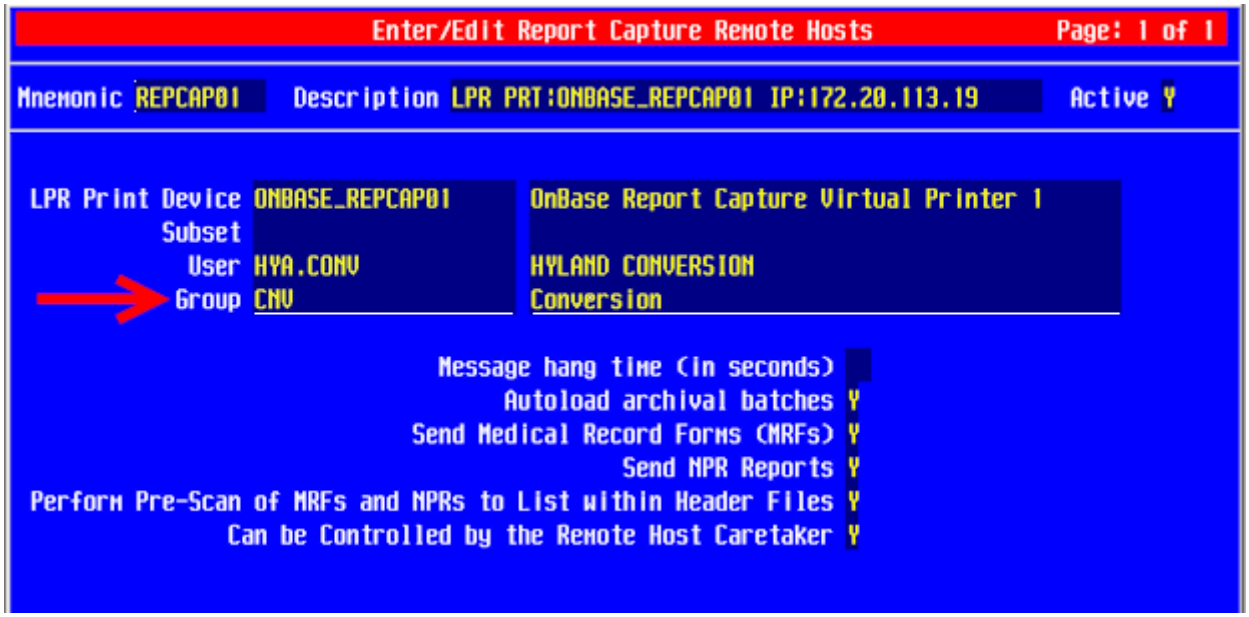
You can group multiple remote host processors together to handle specific tasks by first creating a remote host group and then assigning this group to individual remote hosts during remote host configuration.

To create a remote host group, select the **Enter/Edit Remote Host Groups** option. The **Enter/Edit Report Capture Remote Host Groups** window is displayed:



Enter a name for the remote host group in the **Mnemonic** field, and then enter any additional desired information in the remaining fields.

Once you have created a remote host group, return to the **Report Capture to OnBase Main Menu - CAP**. Then, to assign the remote host group to individual remote hosts, select the **Enter/Edit Remote Hosts** option. The **Enter/Edit Report Capture Remote Hosts** window is displayed:



In the **Group** field, enter the name of the desired remote host group. The remote host will be assigned to the specified remote host group.

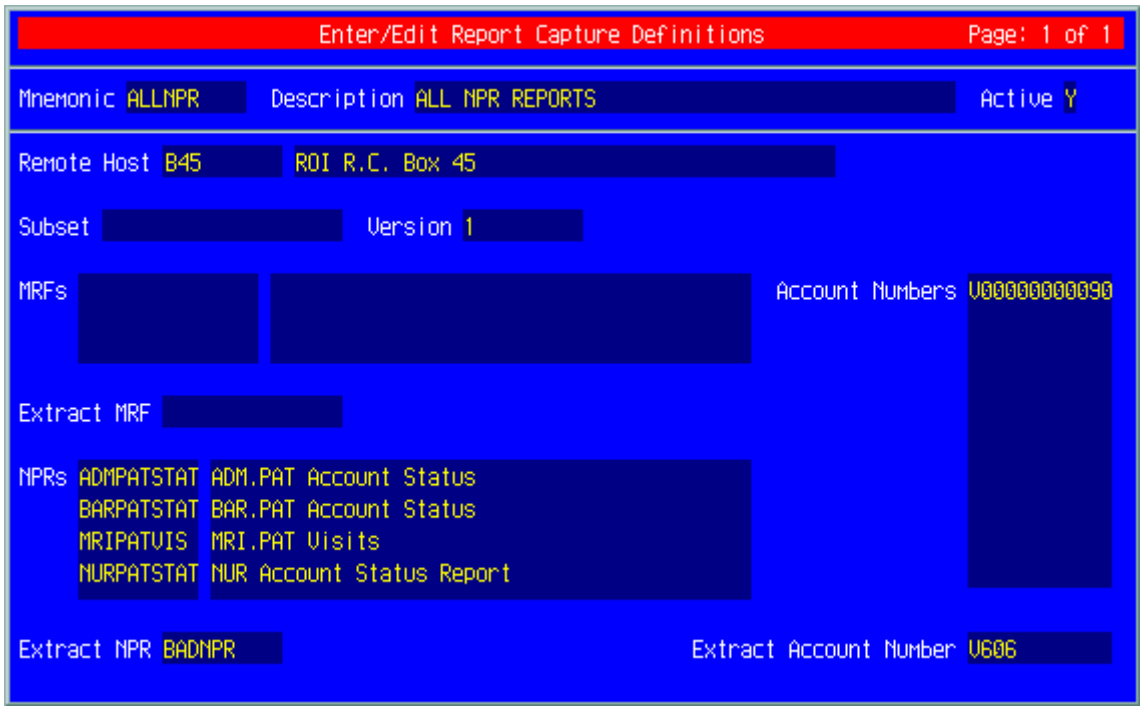
For more information on creating remote hosts, see Configuring Remote Hosts on page 83.

Defining a Group of Reports to be Processed

You can configure a set of NPR or MRF forms together into a Report Capture Definition. Once a definition has been configured, Report Capture users will be able to quickly and efficiently run the Report Capture processor across the configured forms.

To configure a Report Capture Definition, follow these steps:

1. Select the **Enter/Edit Request Definitions** option. The **Enter/Edit Request Definitions** window is displayed:



2. Enter a descriptive mnemonic for your Report Capture Definition in the **Mnemonic** field.
3. Enter a description for your Report Capture Definition in the **Description** field.
4. Enter **Y** in the **Active** field.
5. Enter the name of a machine running your Report Capture Importer Service in the **Remote Host** field. If you don't know the name of the host machine you are searching for, you can press **F9** to perform a lookup to select from a list of available host machines.
6. Enter the code associated with the subset of reports that you would like to be printed in the **Subset** field. If you don't know the code for the subset you want to use, you can perform a lookup to select from a list of active subsets.
7. Enter **1** into the **Version** field.
8. Add any additional MRF reports you want to be printed to the **MRFs** field. If you don't know the name of the specific report you need, you can press **F9** to perform a lookup to select from a list of available reports.
9. Enter one or more visit numbers in the **Account Numbers** field. If you don't know the number of a visit you are searching for, you can press **F9** to perform a lookup to select from a list of available visits.
10. Add any additional NPR reports you want to be printed to the **NPRs** field. If you don't know the name of the specific report you need, you can press **F9** to perform a lookup to select from a list of available reports.

11. Press the **F12** key, then enter **Y** to the prompts that are displayed. Your Report Capture Definition is saved and can be processed the next time the Report Capture processor is run.

Note: The **Extract MRF**, **Extract NPR**, and **Extract Account Numbers** fields are used only for troubleshooting purposes, and should be left blank unless you have been directed otherwise by your first line of support.

Skipping Machines When Scanning LPR Queues

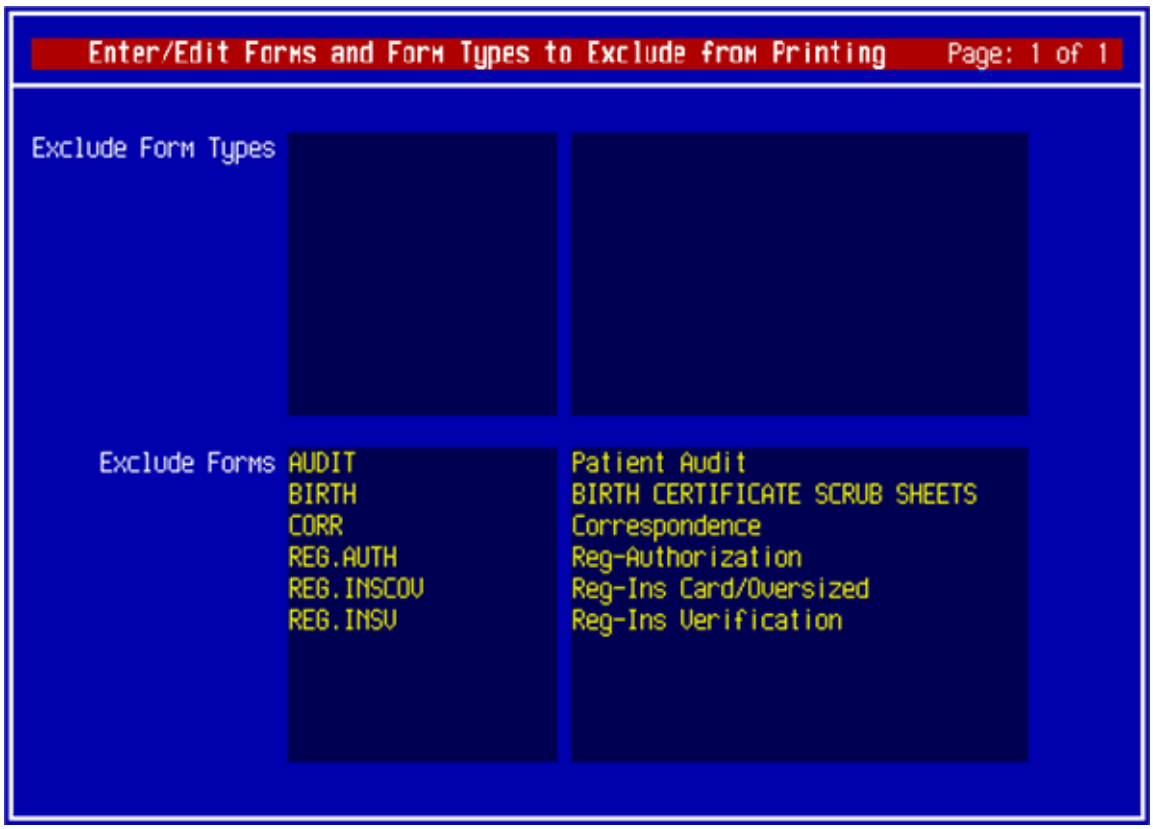
In some cases, you may have machines that are connected to Meditech but do not need to use Report Capture to print reports. In these situations, you should configure your system to skip these machines when scanning the LPR queues. To do so, select the **Enter/Edit Machines to Skip when Scanning LPR Printer Queue** option and add the names of all machines you want to skip. The next time you view or manage the LPR printer queue, the excluded machine names will not be displayed.

Excluding Specific Documents

You can specify certain forms and form types to be automatically excluded from all **Send to OnBase** operations. When a user attempts to send an excluded document to OnBase, a warning message will be displayed and the excluded document(s) will not be sent to OnBase.

To configure your system to exclude one or more forms or form types, follow these steps:

1. Select the **Enter/Edit MRF Forms and MRF Types to Exclude** option. The **Enter/Edit Forms and Form Types to Exclude from Printing** window is displayed:



2. Press **F9** to perform a lookup, and select the specific forms and form types you want to exclude.
3. After all of the desired exclusions have been identified, press **F12** to save the exclusion list.
4. To exit, press the **Esc** or **F11** key. A prompt will be displayed to verify that you want to exit - enter **Y** and press **Enter** to exit.

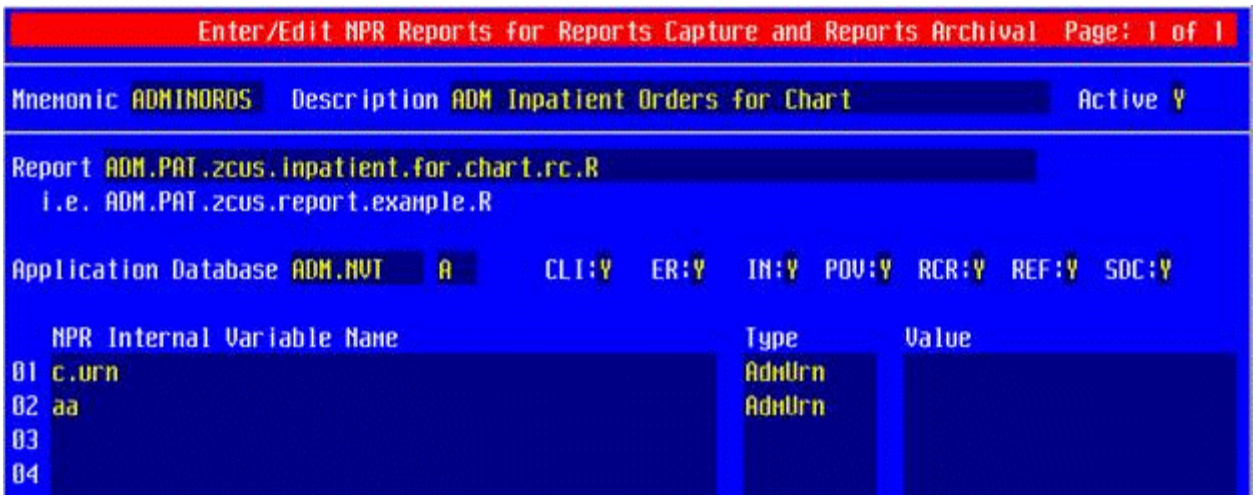
Configuring Message Hang Time

When you set up one or more excluded forms or form types and a user attempts to print those forms or form types, a notification message will be displayed to inform the user that the form or form type will not be printed.

You can configure the length of time this message will be displayed by navigating to the **Report Capture to OnBase Main Menu - CAP** and selecting the **Enter/Edit Remote Hosts** option and modifying the **Message hang time (in seconds)** setting.

Configuring NPR Reports

You can configure new and existing NPR Reports by selecting **Enter/Edit NPR Reports to Capture**. The **Enter/Edit NPR Reports for Reports Capture and Reports Archival** window is displayed:

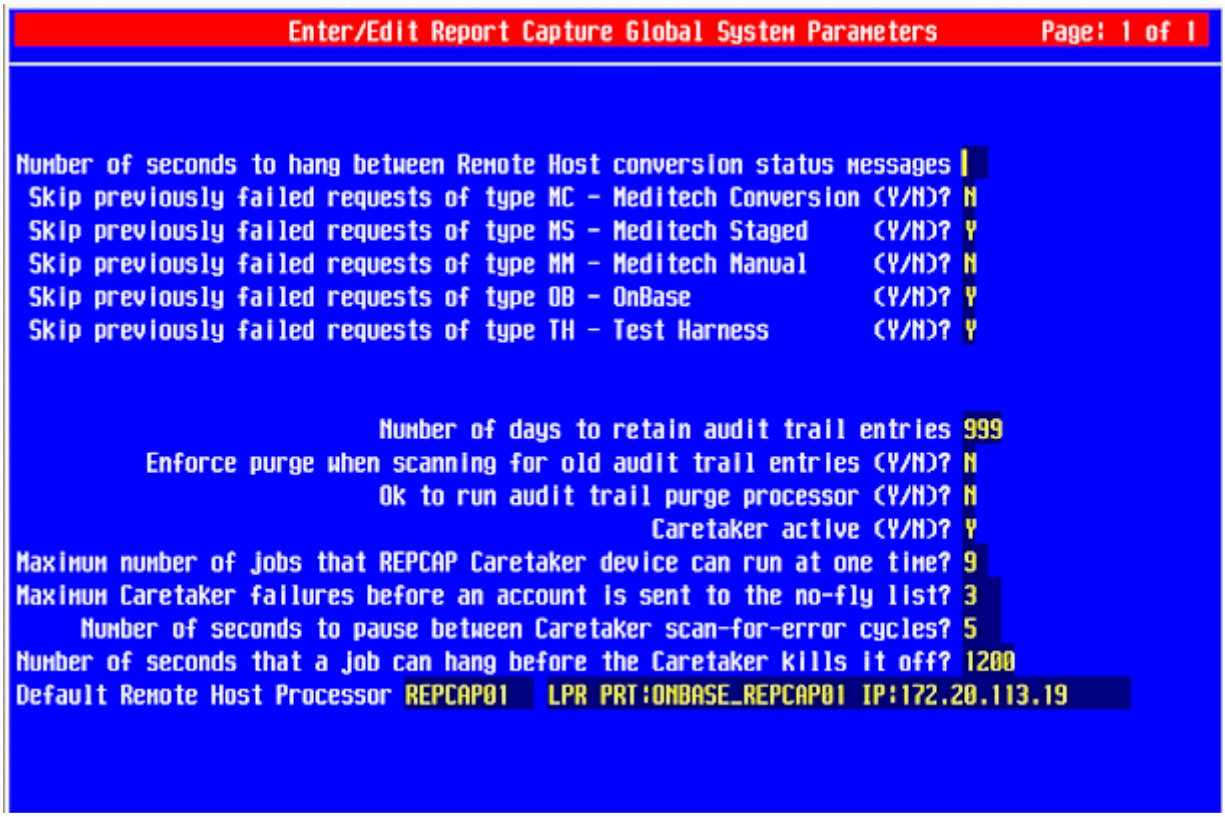


Enter the appropriate information in all desired fields for the NPR Reports you wish to configure. For more information on configuring NPR Reports, contact your solution provider.

Purging Audit Logs

To purge unneeded audit logs from your Report Capture system, follow these steps:

1. Select the **File Maintenance Menu** option.
2. Select **Enter/Edit Global Parameters**. The **Enter/Edit Report Capture Global System Parameters** dialog box is displayed.



3. Enter the name of the machine you want to use to run the audit log purge process in the **Default Remote Host Processor** field. If you do not know the name of the host machine you are searching for, you can press **F9** to perform a lookup to select from a list of available host machines.
4. Specify a value for each **Skip previously failed requests of type _** option. See the following table for a description of each available option:

Value	Description
Y	When this value is specified, any failed Report Capture requests of the specified type will be skipped when the processor is run again. This can be useful if you want to re-run an entire request with some additional information, and you do not want to keep items imported via the previous unsuccessful request.

Value	Description
N	When this value is specified, any failed Report Capture requests of the specified type will not be skipped. In other words, these requests will continue to be processed from the point at which they failed once the processor is run again.

5. Leave the **Number of seconds to hang between Remote Host conversion status messages** option blank.
6. Enter the number of days you want to retain entries in your audit log in the **Number of days to retain audit trail entries** field.
7. Set the **Enforce purge when scanning for old audit trail entries** option to **Y** to run the process. If this setting is set to **N**, the process will execute a test run across your audit logs.
8. Set the **OK to run audit trail purge processor** option to **Y** to run the process.
9. Enter the maximum number of jobs to be run simultaneously in the **Maximum number of jobs that REPCAP Caretaker device can run at one time** field.
10. Once all parameters have been set, return to the **File Maintenance Menu** and select **Start Audit Trail Purge Processor**. The audit logs are purged according to the settings you configured in the **Enter/Edit Report Capture Global System Parameters** dialog box.

Report Capture Downtime Solution

When a Meditech line of business application has downtime, whether it's planned or unplanned, it is vital to still be able to view reports. Report Capture can be configured in conjunction with Workflow to allow select reports to be viewed through OnBase so that critical healthcare decisions are not hindered by downtime. Through Workflow, requests can be made to obtain reports based on certain patient Admit Types. For more information on configuring Admit Types, see the Admit Type Configuration topic in the **HL7 Module** documentation.

To configure Workflow to request these reports, use the Submit Report Capture Batch for Inpatients action.

Submit Report Capture Batch for Inpatients

This action allows for the creation of a new Report Capture batch for inpatients with various admission types. It allows you to specify the admit type for the inpatients as well as the corresponding Document Types for the batch.

Note: This action is not supported in the OnBase Client Classic Workflow interface.

Option: Report Capture Properties

Configure the following Keyword Types:

- **Inpatient Admit Type Keyword Type -** From the drop-down list, choose the Keyword Type that stores the admission type of the patient. They Keyword Type can contain and admission type name or ID.
- **Printer Name Keyword Type** - From the drop-down list, choose the Keyword Type that stores the printer name. This setting is optional. When this setting is configured, the **Facility Name Keyword Type** setting is also required.
- **Facility Name Keyword Type** - If your solution includes multiple facilities, select the Keyword Type that stores the facility name or facility ID number. This setting is optional unless the **Printer Name Keyword Type** setting is configured.
- **Batch ID Keyword Type** - From the drop-down list, choose the Keyword Type that stores the batch ID number.

Option: Report Capture Document Types

From the **Available Document Types** drop-down list, choose a Document Type that has the configured Keyword Types assigned to it, then click **Add**. As a Document Type is added, it appears in the **Selected Document Types** list. To remove a Document Type from this list, select it, then click **Remove**.

Document Types must be mapped to the report types you want to include in the batch.

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Report Capture

User Guide

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Usage Overview

Depending on your solution, you may be able to use Report Capture to send reports from your Meditech Magic system to your OnBase system in a variety of ways.

With the proper licensing and configuration, you can use the Release of Information module to retrieve documents from Meditech Magic through Report Capture, or you can use Workflow Life Cycles specific to your line-of-business processes to retrieve documents from Meditech Magic through Report Capture automatically. For more information, see the Medical Records Release of Information documentation and the Workflow documentation, respectively.

Alternatively, you can print Medical Record Forms and Non-Procedural Reports on an ad hoc basis directly into OnBase from within your Meditech system. Documents printed to OnBase are automatically indexed with the relevant **Medical Record Number** and **Account Number**. For more information, see Meditech Client Usage on page 94.

Furthermore, depending on your user privileges, you may be able to view or cancel submitted Report Capture batches from the **Report Capture Administration** window in the Unity Client. For more information, see OnBase Usage on page 97.

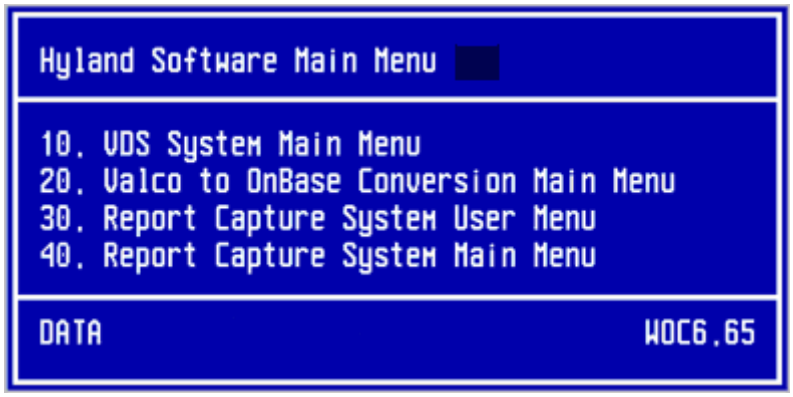
Note: Blank or duplicate documents from your Meditech system are automatically filtered from Report Capture batches and thus are not printed into OnBase.

Meditech Client Usage

Although you can print documents into OnBase from within your Meditech Magic client, it is considered a best practice to use the Release of Information or Workflow modules to automate this process, if available. If you are not licensed for the Release of Information or Workflow modules, or if you need to print Meditech documents into OnBase on an ad hoc basis, see the sections below for information about performing this process from within your Meditech Magic client.

Accessing the Report Capture Menu from Meditech

To access Report Capture functionality from your Meditech system, log on to Meditech and bring up the **MIS Menu**. From there, select the **Hyland Main Menu** option. The **Hyland Software Main Menu** is displayed:



Printing Documents to OnBase

To print documents to OnBase, follow these steps:

1. From the Report Capture menu in Meditech, select the **Report Capture System User Menu** option. The **Reports Capture to OnBase Main Menu** is displayed.
2. Select the **Enter Manual Requests (MEDITECH initiated)** option. The **Send Reports Capture Request to OnBase** window is displayed:

3. To specify what documents you want to print to OnBase, you must define a subset. To do so, press the **Insert** key. The **Master Patient Index Search** window is displayed.
4. Enter a patient's MRN in the **Patient** field to locate a specific record. If you do not know the patient's MRN, you can also perform a lookup by entering the patient's name in the **Patient** field.
5. Enter the desired visit number in the **Account** field. If you don't know the number of the visit you are searching for, you can press **F9** to perform a lookup to select from a list of the patient's visits.
6. Enter the code associated with the subset of reports that you would like to print for the selected patient visit. If you don't know the code for the subset you want to use, you can perform a lookup to select from a list of active subsets.
7. Press **Enter**. The selected patient visit and subset will be displayed as an entry on the **Print Medical Record Forms to ROI** screen.

8. Press the **S** key to send the selected documents to OnBase. You will be prompted to verify that you wish to proceed - enter **Y** and press the **Enter** key to continue.

   Once a subset of documents has been successfully sent to OnBase, it will be removed from the list.

OnBase Usage

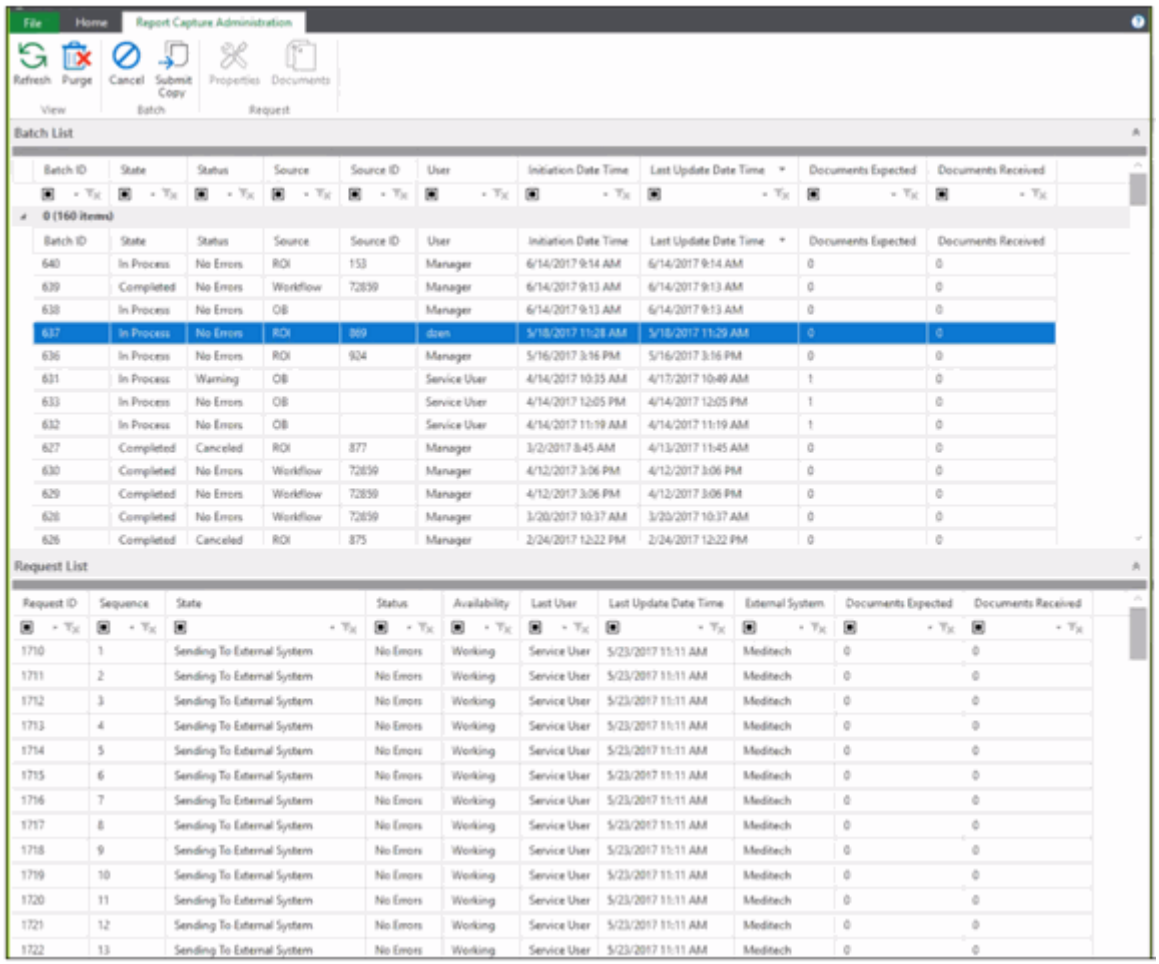
Viewing Report Capture Batch Information

If you have the appropriate user privileges, you may be able to view information on submitted Report Capture batches, from the **Report Capture Administration** window in the Unity Client or Medical Records Unity Client.

To open the Report Capture Administration window in the Unity Client, from the **File** menu, select **Administration | Report Capture Administration**.

To open the Report Capture Administration window in the Medical Records Unity Client, select **Report Capture** in the **Administration** group of the **Home** ribbon.

The **Report Capture Administration** dialog is displayed:



The top portion of this window displays the **Batch List**, where you can view a list of recently submitted Report Capture batches. Additional information is displayed in the columns of each batch's listing, including the batch's status, the source of the batch (e.g., Workflow, Meditech Magic, etc.), the total number of documents processed for all requests in the batch, etc.

Note: The **Batch List** displays only the 2,000 most recent batches.

To view a more comprehensive breakdown of a Report Capture batch, select the batch's listing in the **Batch List**. The lower portion of the window will populate the **Request List** with all requests made for the selected batch, with each request corresponding to a patient visit. The **Request List** provides you with request-specific information for the selected batch, including each requests status, processing sequence, external system, number of documents processed, etc.

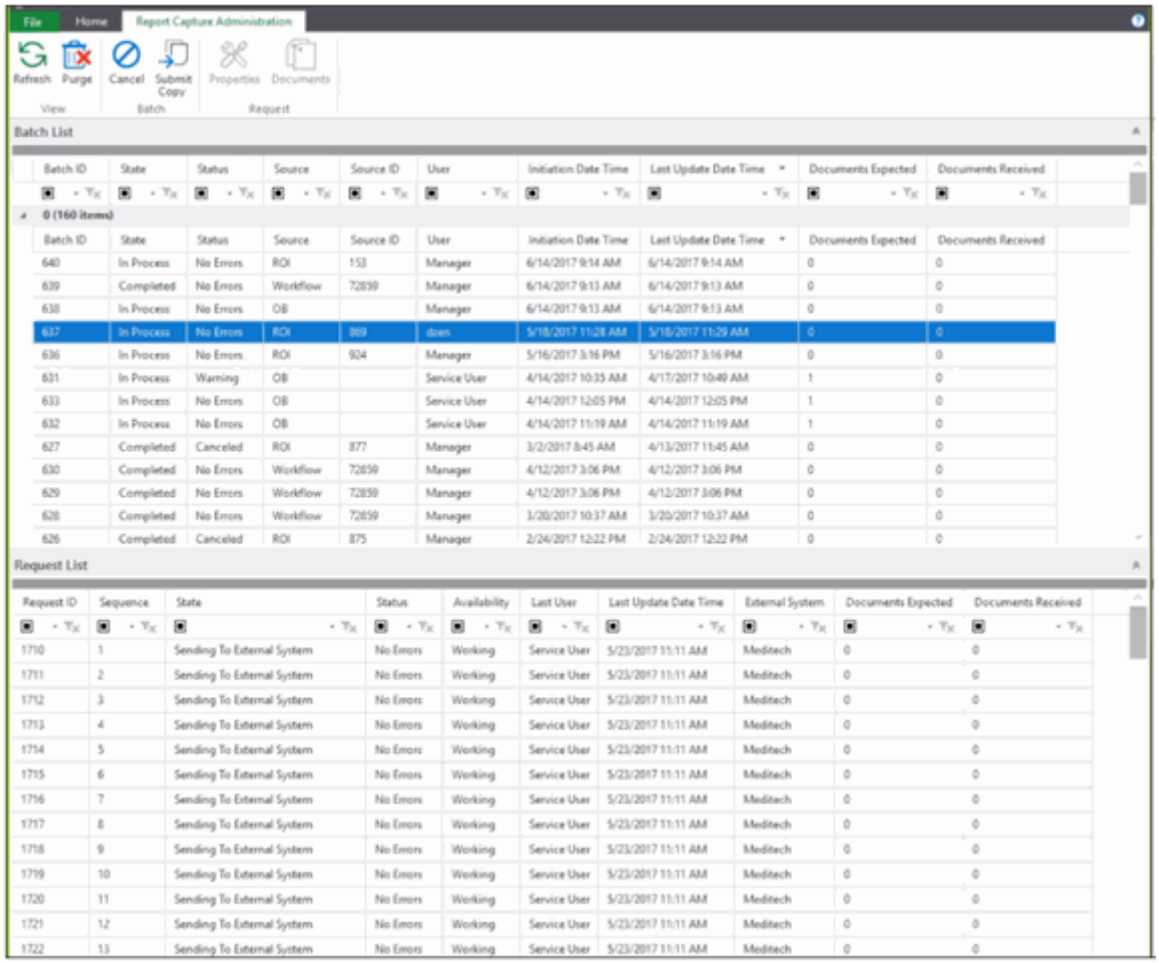
Note: If you are using a Meditech Magic system, each request corresponds to a unique patient visit. If you are using a Meditech 6.0 system, a single patient visit may correspond to separate requests made to the Meditech Client/Server and Meditech M-AT modules.

To update the **Batch List** and **Request List** in the **Report Capture Administration** window, click **Refresh** in the **Actions** ribbon group, or right-click an area in the **Batch List** and select **Refresh**.k

Canceling a Report Capture Batch

In some cases, you may need to cancel a Report Capture batch after it has been submitted. To cancel an in-process Report Capture batch, follow these steps:

1. Open the **Report Capture Administration** window.
2. In the **Batch List**, select the appropriate Report Capture batch.



3. In the **Batch** ribbon group, click **Cancel,** or right-click the selected batch and select **Cancel**. A notification is displayed indicating whether or not the batch was successfully canceled.

Note: The **Cancel** button is disabled if the selected batch has already been canceled, is in the process of being canceled, or is otherwise complete. Only in-process batches can be canceled.

Copying an Existing Report Capture Batch

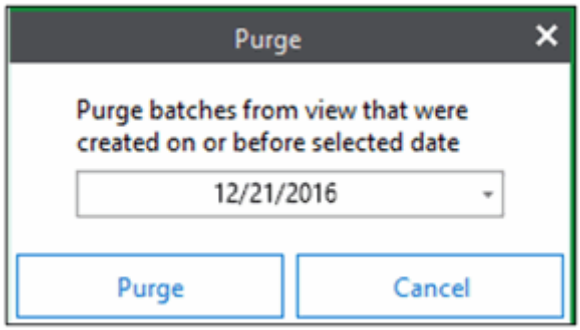
In some cases, you may want to submit a copy of an existing Report Capture batch. To submit a copy of an existing batch, follow these steps:

1. Open the **Report Capture Administration** window.
2. In the **Batch List**, select the batch you want to copy.
3. In the **Actions** ribbon group, click **Submit Copy**, or right-click the selected batch and select **Submit Copy**. A new batch is submitted based on the existing batch definition. A notification is displayed indicating whether or not the copy was successfully submitted.

Purging Report Capture Batches

In the event that your **Report Capture Administration** window becomes cluttered with a high volume of Report Capture batches, you may want to purge completed batches that were last modified on or before a certain date. To purge completed Report Capture batches, follow these steps:

1. Open the **Report Capture Administration** window.
2. In the **Actions** ribbon group, click **Purge**, or right-click an area in the **Batch List** and select **Purge**. The following dialog box is displayed:

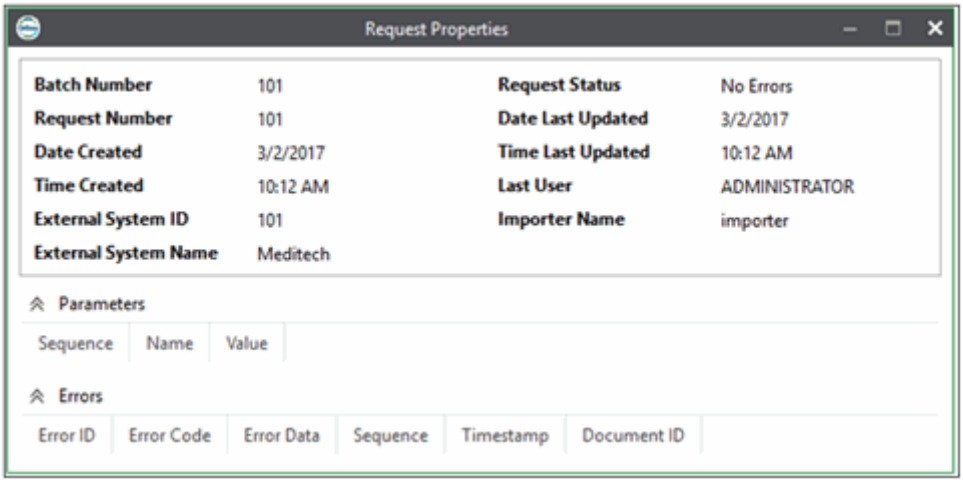


3. Select a valid date. Completed batches that were last modified on or before the selected date will be purged. The date must be in the past. The default date is 90 days before the current date.
4. Click **Purge** to purge the batches, or click **Cancel** to return to the **Report Capture Administration** window.

5. If you clicked **Purge** and the date selected is valid, a confirmation dialog box is displayed.
   - If you are sure you want to purge these batches, click **Yes**. The batches are purged and removed from the **Batch List**.
   - Click **No** to cancel the purge and return to the **Report Capture Administration** window.

Viewing Request Properties

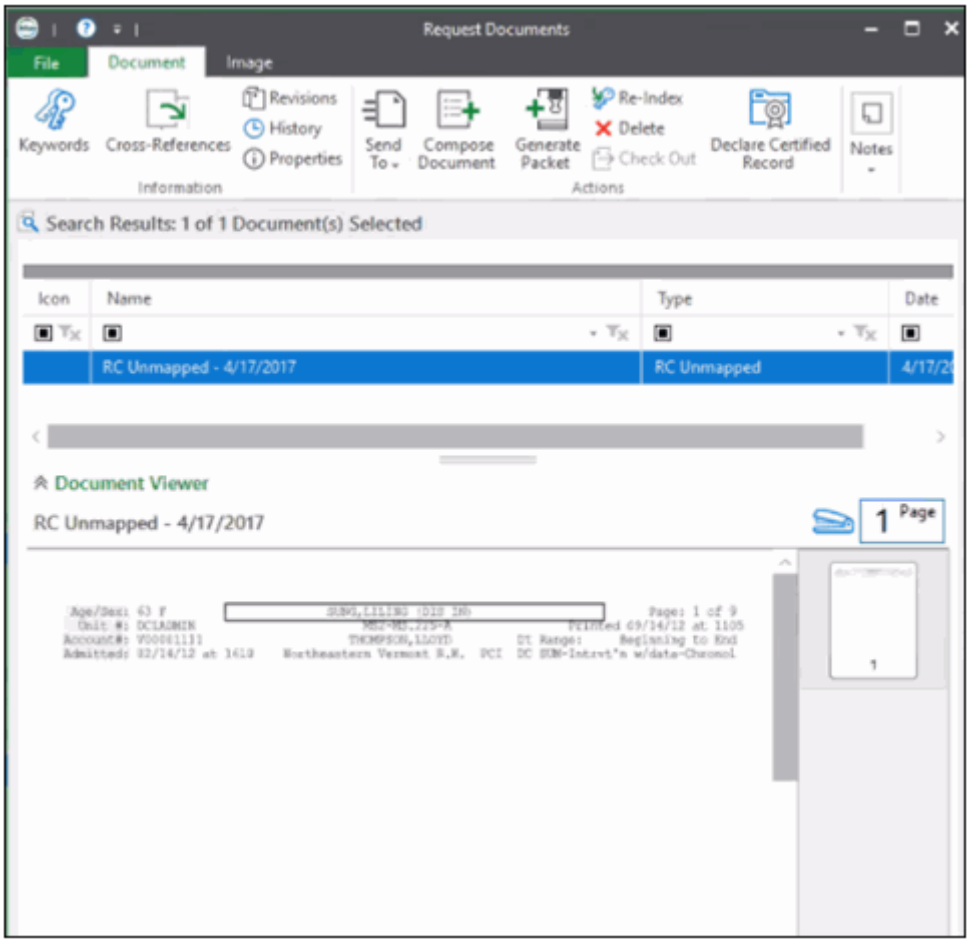
To view request properties and a list of parameters or errors belonging to a request, select a request in the **Request List**, then click **Properties** in the ribbon menu or right-click and select **Properties**. The **Request Properties** dialog box is displayed:



The properties of the request are displayed. To view parameters, ensure that the **Parameters** section is expanded. If the request is in an Error or Warning state, view error details by expanding the **Errors** section.

Viewing Request Documents

To view the documents associated with a request, select a request in the **Request List**, then click **Documents** in the ribbon menu or right-click and select **Documents**. The **Request Documents** dialog box is displayed:



This dialog box allows you to see a list of documents associated with the request. It also provides a document viewer for viewing individual documents associated with the request.

Working With the Report URN Keyword

When properly configured and mapped to the appropriate Meditech value, the **Report URN** Keyword Type can be used to identify unique reports for individual accounts. The Keyword Value that populates the **Report URN** field is actually a composite value consisting of several different Meditech components. When searching for Meditech reports or sorting by the **Report URN** Keyword Type in your OnBase system, note that, depending on the report type, the **Report URN** composite value reflects the individual Meditech components in one of the formats listed in the sections below.

Note: Depending on your configuration, your Meditech reports may not have a Keyword Type named **Report URN**. For more information, contact your system administrator.

LAB / BBK / MIC / PATH Specimen Inquiry Reports

The **Report URN** composite value takes the following format for any of the Lab Specimen Inquiry Reports:

<module>_<collection.date>_<collection.time>_<prefix>_<number.part>_<spec.number>_<spec.urn>

Examples of **Report URN** values that follow this format are listed below:

Meditech Report Type	Sample Report URN Value
LAB Lab Specimen Inquiry Report	**L_20130723_1201_CH_1_0733:CH00005T_1856**
BBK Lab Specimen Inquiry Report	**B_20130723_1302_CH_1_0323:CH00009T_1976**
MIC Lab Specimen Inquiry Report	**M_20130723_1405_CH_1_0723:CH00007T_1775**
PATH Lab Specimen Inquiry Report	**P_20130723_1507_CH_1_0383:CH00003T_1332**

OE Inpatient Orders Summary Reports

The **Report URN** composite value takes the following format for OE Inpatient Orders Summary Reports:

<report.mnemonic>

For example: **ADMINORDS**

RAD Exam Reports

The **Report URN** composite value takes the following format for RAD Exam Reports:

<collection.date>_<number.part>

For example: **20110120_1**

OnBase®
Foundation EP5

Report Capture

Installation Guide

Foundation EP5

Requirements

The following sections outline requirement information specific to Report Capture in OnBase Foundation EP5.

General Requirements

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

- Supported Desktop Operating Systems, see the **OnBase Client** and the **Web/ Application Server** table columns
- Client Retrieval Workstation Hardware Requirements
- Databases Supported, see **Microsoft SQL Server**

Note: Oracle databases are not supported for Report Capture with Meditech 6.0.

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

Microsoft Visual C++ Requirements

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

Workstations running Report Capture require the following:

- Microsoft Visual C++ 2012 Redistributable Package (x86)
- Microsoft Visual C++ 2013 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)

Licensing

See Licensing on page 1 for licensing requirements.

Pre-Installation

The OnBase Application Server

Prior to installing the Report Capture for Meditech module, you must ensure that your OnBase Application Server has been installed and configured properly.

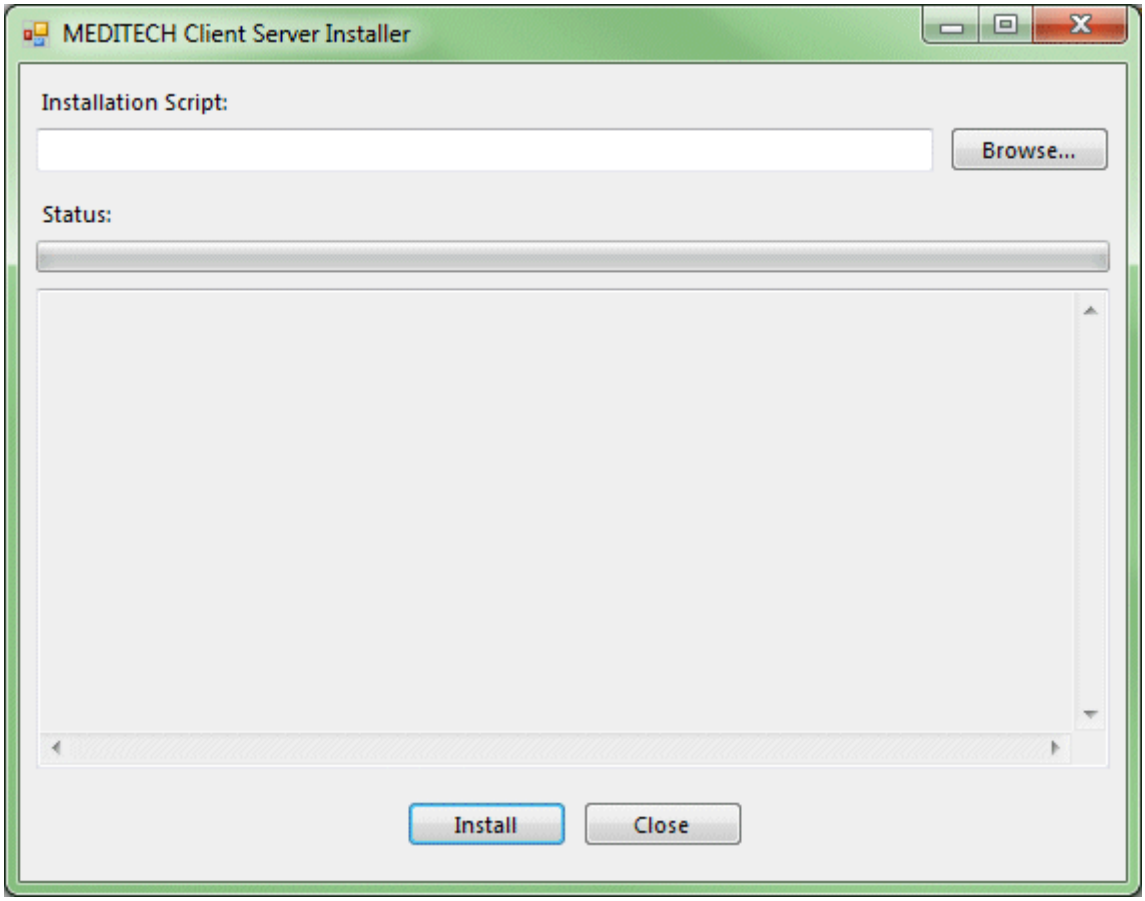
For more information on installing the Application Server, see the Application Server module reference guide.

The Meditech 6.0 Components

Because certain Meditech 6.0 components are run from the workstation, prior to installing Report Capture, you must install a set of files on your workstation to support a Meditech 6.0 environment.

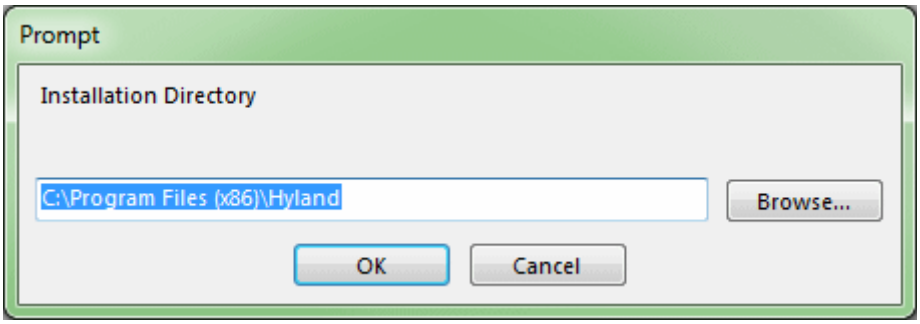
To install these files, first obtain the **ReportCapture.ClientServerInstaller.zip** file from your solution provider and copy it to your workstation. Extract all files from the .zip file, and then follow the procedures below.

1. In the **ReportCapture.ClientServerInstaller** folder, double-click the **Hyland.Integrations.Meditech.ClientServerInstaller.exe** executable to launch the installer. The **MEDITECH Client Server Installer** dialog box is displayed.



2. Browse to the Installation Script file (e.g., **ReportCapture_Complete.xml**) in the **ReportCapture.ClientServerInstaller** folder. Once the full path to it is displayed in the **Installation Script** field, click **Install**.

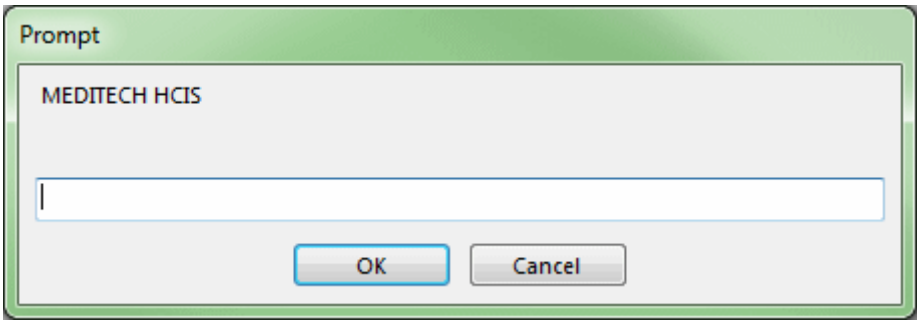
3. As the script is prepared for installation, you are prompted for an installation directory.



By default, this directory is set to one of the following:

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

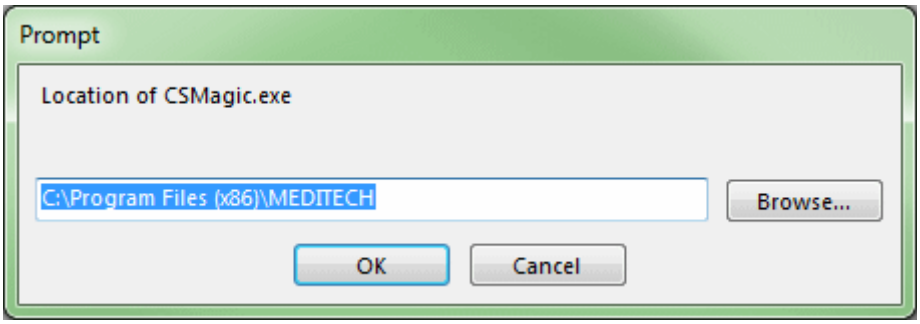
4. Browse to a different installation directory if desired. Once the directory is set, click **OK**. You are prompted for a Meditech HCIS value.



5. Enter the mnemonic of your 6.0 NPR RING in the field.

Tip: To find this value in your Meditech 6.0 client, select **UNIVERSE | DICTIONARIES | HCIS | VIEW**. Locate the NPR version of the ring you are installing the Meditech 6.0 components for; this is signified by an **N** at the end of the ring mnemonic (e.g., **ABC.TEST60N**).

6. Click **OK**. You are prompted for the location of the **CSMagic.exe** executable.



7. Enter or browse to the full path to the **CSMagic.exe** executable in the field. For example:
   - **C:\Program Files\MEDITECH\ABC.Universe\ABC.TEST60N.Ring\NPRClient** (in a 32-bit environment)
   - **C:\Program Files (x86)\MEDITECH\ABC.Universe\ABC.TEST60N.Ring\NPRClient** (in a 64-bit environment)
8. Click **OK**. The script begins to install the files, tracking progress in the status bar and in the progress field.
9. Once the installation is complete, click **Close**.

   The files necessary for supporting your Meditech 6.0 environment now reside in the specified installation directory.

Modifying the repcap.config Configuration File

During the installation of the Meditech 6.0 components, the **repcap.config** configuration file is created and placed in the location where the components are being installed. For example:

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

While many of the configuration settings are set during the installation, you can change these and other settings in the **repcap.config** file after the installation to modify the setup and behavior of your Report Capture solution.

To modify settings that correspond to the Meditech 6.0 components, open the **repcap.config** file.

The Processor Element

The **processor** element defines a single instance of a Report Capture processor. While only a single processor can be run at one time, additional processors can be configured as inactive, if needed.

Application Settings	Description
mnemonic	Set this option equal to a unique ID for the processor instance. When the processor is running, this value is displayed in the processor window's title bar. **Note:** No other configured processor instance can share the same value for this setting.
active	This option controls whether the processor instance can be run. • To allow the processor instance to run, set this option to **true**. • To prevent the processor instance from running, set this option to **false**.
name	Set this option equal to a descriptive or friendly name for the processor instance. When the processor is running, this value is displayed in the processor window's title bar.

Application Settings	Description
logVerbosity	This option sets the level of information (e.g., **OFF**, **LOW**, **MED**, **HIGH**) that is written to the Report Capture log file while the processor is running.
pclPrinter	Set this option equal to the Meditech mnemonic of the printer where PCL-formatted documents should be printed. **Note:** The values for the **pclPrinter** and **textPrinter** settings must be different.
textPrinter	Set this option equal to the Meditech mnemonic of the printer where text-formatted documents should be printed. **Note:** The values for the **pclPrinter** and **textPrinter** settings must be different.
dbRAD	Set this option equal to the Meditech mnemonic of the **Radiology/ ITS** application database where requested reports will be extracted.
dbMRI	Set this option equal to the Meditech mnemonic of the **Medical Records** application database where requested patient unit and account numbers will be verified.
dbLAB	Set this option equal to the Meditech mnemonic of the **Laboratory** application database where requested reports will be extracted.
user	Set this option equal to the Meditech mnemonic of the **User/ Person** that will be used as a proxy to print the requested reports. On some reports, this value is displayed on the header below the user that ran the report.

The Preprocessor Element

The **preprocessor** element defines a single instance of a Report Capture pre-processor. While only a single pre-processor can be run at one time, additional pre-processors can be configured as inactive, if needed.

Application Settings	Description
mnemonic	Set this option equal to a unique ID for the pre-processor instance. When the pre-processor is running, this value is displayed in the pre-processor window's title bar. **Note:** No other configured pre-processor instance can share the same value for this setting.

Application Settings	Description
active	This option controls whether the pre-processor instance can be run. • To allow the pre-processor instance to run, set this option to **true**. • To prevent the pre-processor instance from running, set this option to **false**.
name	Set this option equal to a descriptive or friendly name for the pre-processor instance. When the pre-processor is running, this value is displayed in the pre-processor window's title bar.
dbRAD	Set this option equal to the Meditech mnemonic of the **Radiology/ ITS** application database where requested reports will be extracted.
dbMRI	Set this option equal to the Meditech mnemonic of the **Medical Records** application database where requested patient unit and account numbers will be verified.
dbLAB	Set this option equal to the Meditech mnemonic of the **Laboratory** application database where requested reports will be extracted.

Configuring the Preprocessor Element to Purge Batches

The **preprocessor** element can be configured to allow a Report Capture pre-processor to purge batches after a specific amount of time. To enable purging, add the following **purging** element to a pre-processor in the **repcap.config** file:

```
<purging>
    <status name="waiting" enabled="true" days="30"/>
    <status name="ready" enabled="true" days="30"/>
    <status name="complete" enabled="true" days="30"/>
    <status name="canceled" enabled="true" days="30"/>
    <status name="error" enabled="true" days="30"/>
</purging>
```

By default, the pre-processor will purge all Report Capture batches with any status after they have not been modified for 30 days. To alter the default settings, set the **days** attribute to the preferred number of days after which batches will be purged if they have not been modified. To disable purging for batches of a certain **status name**, set the **enabled** attribute to **false** for that status.

Installation

The Report Capture module is installed via the Hyland Report Capture for Meditech installer.

Overview

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

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

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

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

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

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

ClickOnce deployments also have the following advantages:

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

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

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

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

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

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

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

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

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

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

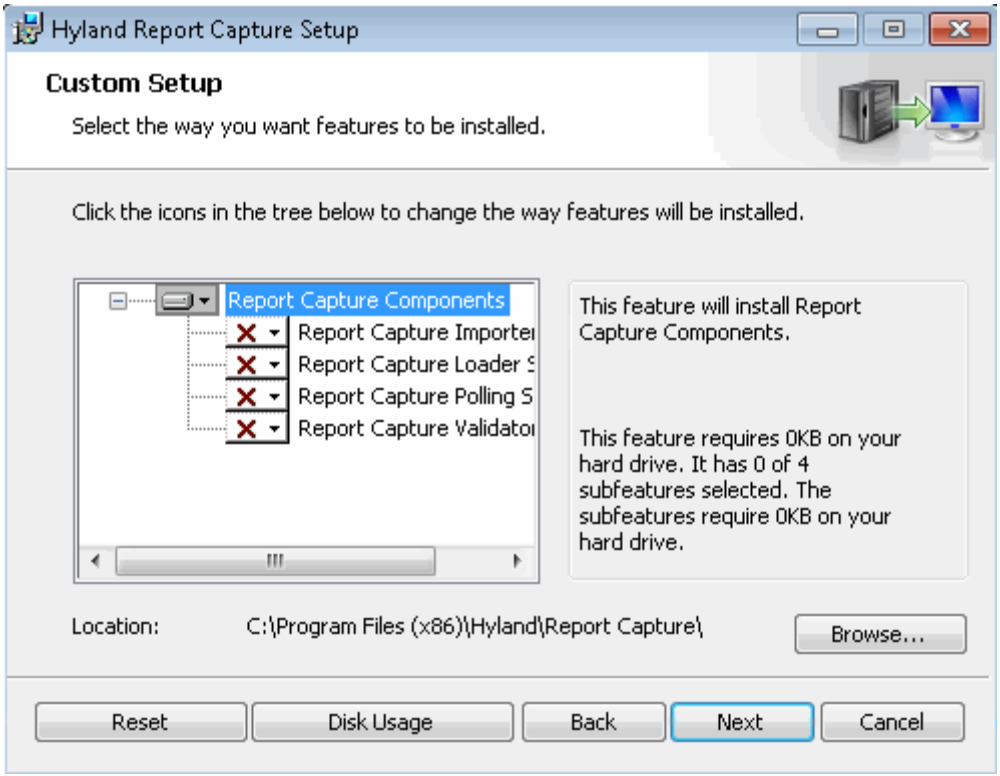
Running the Installer

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

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

The Hyland Report Capture installation welcome dialog is displayed.

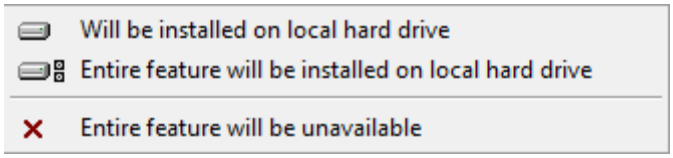
1. Click **Next**. The **Custom Setup** dialog box is displayed.



The following components can be installed using the Hyland Report Capture installer:

Component	Description
Report Capture Importer Service	The Report Capture Importer Service serves as an LPR printing device for Meditech and prints reports as PCL files.
Report Capture Loader Service	The Report Capture Loader Service loads Report Capture PCL files into your OnBase system.
Report Capture Polling Service	The Report Capture Polling Service polls your hosted OnBase system for Report Capture requests and sends them to Meditech.
Report Capture Validator Service	The Report Capture Validator Service parses Meditech reports and uploads the data into your OnBase system.

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



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

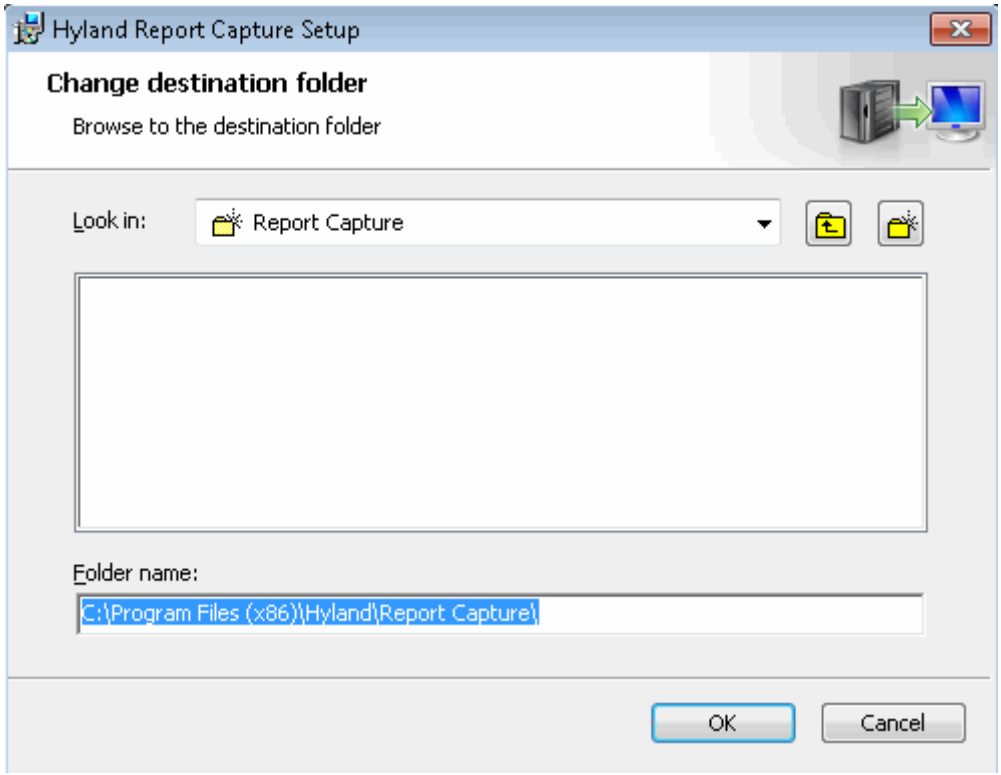
3. Select **This feature will be installed on local hard drive** for each component you want to install.

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

Note: Depending on which components you choose to install, one or more of the following steps may not apply to your installation.

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

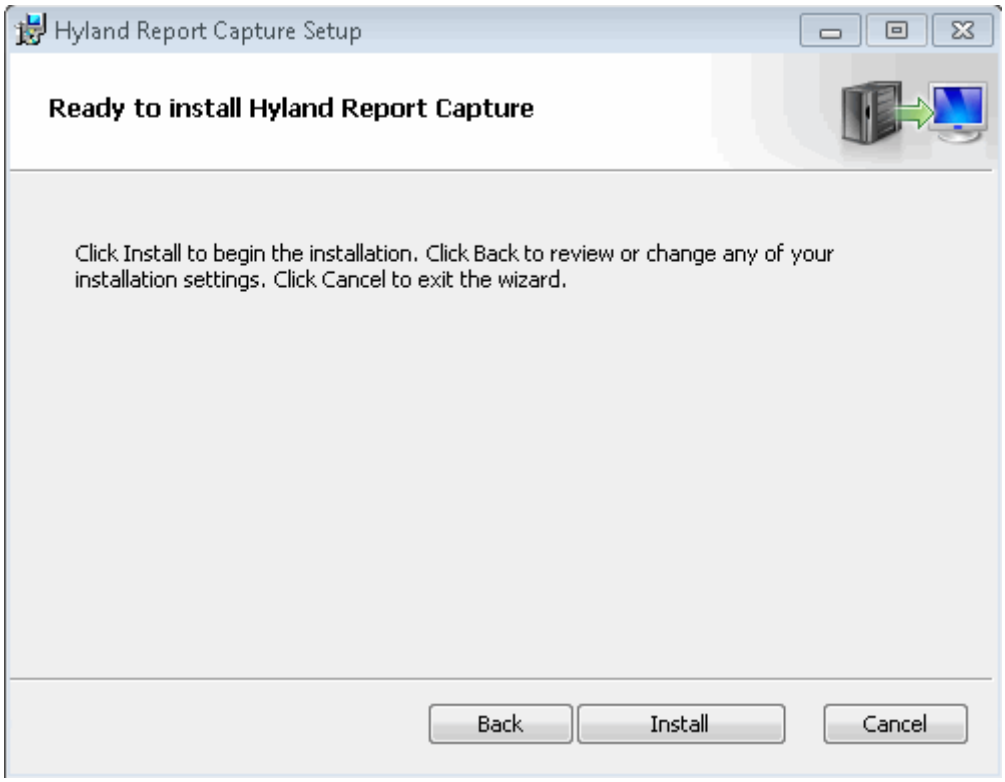
5. To change the installation location of a component, select it and click **Browse**. The **Change destination folder** dialog is displayed.



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

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

6. Click **Next**. The **Ready to install Hyland Report Capture** dialog is displayed.



7. Click **Install** to install the selected components.

   Click **Back** to return to the previous dialog to change configuration options, or click **Cancel** to close the installer without installing any of the selected components.
8. When the **Completed the Hyland Report Capture Setup Wizard** dialog is displayed, click **Finish** to complete the installation.

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

9. If you installed the Report Capture Scripting Tray, you must manually launch the Scripting Tray application to start the scripting engine. Once launched, the Scripting Tray icon is displayed in the Windows taskbar.

   You can stop or restart the scripting engine by clicking on the icon and selecting **Stop Scripting** or **Restart Scripting**, respectively.

Change, Repair, or Remove an Installation

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

Select the option for the actions you wish to perform:

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

Running the Installer From the Command Line

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

Feature Names

You can control the installation of components from the command line using the **ADDLOCAL** property. To install a component, pass its feature name to the installer using the **ADDLOCAL** property. The table below lists the feature names for each component in the Hyland Report Capture installer.

The **ADDLOCAL** property is appended to the end of the install command line, as shown here:
msiexec /i "Hyland Report Capture.msi" ADDLOCAL=ReportCapture

This example installs the Report Capture.

Note: Feature names are case sensitive and must be added to the command line exactly as they appear in this table. For details on the associated properties, see Property Names on page 120.

Component	Feature Name
Report Capture Importer Service	**ReportCaptureImporter**
Report Capture Loader Service	**ReportCaptureLoader**
Report Capture Polling Service	**ReportCapturePolling**
Report Capture Validator Service	**ReportCaptureValidator**
Report Capture Scripting Tray	**ReportCaptureScripting**

Property Names

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

Property	Description
NTSERVICE_USE_DOMAIN_ACCOUNT	Specifies whether a domain account is used to run the installed services. Enter **1** to run the services under a specified domain account. To disable this option, set this property to **0**. By default, this property is set to **0**. For example: **NTSERVICE_USE_DOMAIN_ACCOUNT="1"**
NTSERVICE_USER	The domain user account to use if NTSERVICE_USE_DOMAIN_ACCOUNT is set to **1**. For example: **NTSERVICE_USER="domain\username"**

Property	Description
NTSERVICE_PASS	The password for the NTSERVICE_USER account. For example: **NTSERVICE_PASS="MyPassword"**

Configuration Files

During installation, a configuration file and a configuration application shortcut that corresponds to each of the Report Capture components being installed (for example, the Importer Service, Loader Service, Polling Service, Validator Service, and Scripting Tray) is created and placed in the location where Report Capture is being installed. For example:

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

While many of the configuration settings are set during the installation, you can change these and other settings in the appropriate configuration file after the installation to modify the setup and behavior of your Report Capture solution.

The configuration application is used to modify Application Server connection settings that require encryption within the corresponding component's configuration file. For more information on modifying settings for each corresponding Report Capture component, see the following sections:

- Modifying the Importer Service's Configuration File on page 36
- Modifying the Loader Service's Configuration File on page 38
- Modifying the Polling Service's Configuration File on page 39
- Modifying the Validator Service's Configuration File on page 40
- Modifying the Scripting Tray's Configuration File on page 43
- Modifying the Service's Application Server Settings on page 48

Modifying the Importer Service's Configuration File

To modify settings that correspond to the Report Capture Importer Service, open the **Hyland.Applications.ReportCapture.RCImporterSvc.exe.config** file.

Application Settings	Description
LpdIP	Set this option equal to the IP address of the machine that is running the LPD Server.
LpdPort	Set this option equal to the port to which the LPD Server is connected.

Application Settings	Description
ProcessInterval	Set this option equal to the number of milliseconds you would like the Importer Service to wait before making another attempt to connect to the LPD Server's assigned port. Because other services may be assigned to the same port, but only one service can use the port at a time, the Importer Service may have to make multiple attempts to connect. By default, the **ProcessInterval** setting is set to **6000**, meaning that the Importer Service attempts to connect to the LPD Server's port every six seconds.
BackupArea	Set this option to the location of your **backup** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. By default, the Report Capture installation creates your **backup** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\backup** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\backup** (in a 64-bit environment)
PrimaryArea	Set this option to the location of your **primary** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. By default, the Report Capture installation creates your **primary** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\primary** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\primary** (in a 64-bit environment)
TimeoutInMs	Set this option equal to the number of milliseconds you would like the Importer Service to wait before making another attempt to connect to Meditech after a failed attempt. By default, the **TimeoutInMs** setting is set to **10**, meaning that the Importer Service attempts to connect to Meditech every 0.01 seconds.
ImporterID	This option prepends a unique ID to the file name of files handled by this specific importer service so that the importer service used to handle certain files can be identified. Set this option to an alphanumeric value. The value cannot exceed 30 characters. The ampersand (&) is not supported in this value.

Application Settings	Description
EnableEncryption	This option controls whether the PCL files of Meditech reports created by the Importer Service are encrypted in the **backup** and **Staging** folders. Encrypting these files helps to protect data and ensure compliance with HIPAA standards. By default, the **EnableEncryption** setting is set to **true**, meaning that the PCL files will be encrypted. To disable encryption, set this option to **false**.

Modifying the Loader Service's Configuration File

To modify settings that correspond to the Report Capture Loader Service, open the **Hyland.Applications.ReportCapture.RCLoaderSvc.exe.config** file.

Application Settings	Description
BackupArea	Set this option to the location of your **backup** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. The Loader Service removes the files from this folder once it finishes uploading them into OnBase. By default, the Report Capture installation creates your **backup** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\backup** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\backup** (in a 64-bit environment)
Interval	Set this option equal to the number of milliseconds you would like the main service thread to wait before checking for new work to be performed by the Loader Service. By default, the **Interval** setting is set to **6000**, meaning that the main service thread checks for new work to be performed by the Loader Service every six seconds.
ExternalSystemIDs	Set this option to the system IDs for your hosted OnBase system. By default, the **ExternalSystemIDs** setting is set to **2,9,10**. This comma-separated value contains three external system ID numbers for the three default external Meditech systems: Meditech system (**2**), your Meditech Client/Server system (**9**), and your Meditech MAT system (**10**). The loader service only processes requests for systems configured in this setting.

Modifying the Polling Service's Configuration File

To modify settings that correspond to the Report Capture Polling Service, open the **Hyland.Applications.ReportCapture.RCPollingSvc.exe.config** file.

Application Settings	Description
RetryCount	Set this option to the number of times the polling service tries to reconnect to the Application Server when it has lost connection.
DelayBetweenRetries	Set this option to the number of milliseconds the polling service delays retrying to reconnect to the Application Server after a lost connection.
ExternalSystemIDs	Set this option to the system IDs for your hosted OnBase system. By default, the **ExternalSystemIDs** setting is set to **2,9,10**. This comma-separated value contains three external system ID numbers that allow the Polling Service to send Report Capture requests from your OnBase system to your Meditech system (**2**), your Meditech Client/Server system (**9**), and your Meditech MAT system (**10**), respectively. The polling service only picks up batch requests for systems configured in this setting.
Interval	Set this option equal to the number of milliseconds you would like the main service thread to wait before checking for new work to be performed by the Polling Service. By default, the **Interval** setting is set to **15000**, meaning that the main service thread checks for new work to be performed by the Polling Service every 15 seconds.

By default, the code below is not included in the **Hyland.Applications.ReportCapture.RCPollingSvc.exe.config** file. However, it is considered a best practice to manually add this code to the configuration file to enable error tracing for the Report Capture Polling Service, adjusting the level of tracing detail as appropriate.

```
<system.diagnostics>
<switches>
<add name="hylandTracing" value="3"/>
</switches>
```

```
</system.diagnostics>
```

<System.diagnostics> Settings	Description
hylandTracing	This switch controls error tracing through the Diagnostics Console. Set this switch equal to the number representing the desired level of tracing detail. • **0:** no error tracing • **1:** minimal • **2:** normal • **3:** detailed • **4:** verbose By default, the **hylandTracing** setting is set to **3**, meaning that detailed error messages will be logged in the Diagnostics Console.

Modifying the Validator Service's Configuration File

To modify settings that correspond to the Report Capture Validator Service, open the **Hyland.Applications.ReportCapture.RCValidatorSvc.exe.config** file.

Application Settings	Description
BackupArea	Set this option to the location of your **backup** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. The Validator Service parses the files in this folder and uploads the data into OnBase. By default, the Report Capture installation creates your **backup** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\backup** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\backup** (in a 64-bit environment)
PrimaryArea	Set this option to the location of your **primary** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files before they are uploaded into OnBase. The Validator Service parses the files in this folder and uploads the data into OnBase. By default, the Report Capture installation creates your **primary** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\primary** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\primary** (in a 64-bit environment)

Application Settings	Description
StagingArea	Set this option to the location of your **Staging** folder, which temporarily stores the Meditech reports printed by the Importer Service as PCL files after the Validator Service has parsed their data. The Loader Service removes the files from this folder once it finishes uploading them into OnBase. By default, the Report Capture installation creates your **Staging** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Staging** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Staging** (in a 64-bit environment)
BackEnd	Set this option to the location you would like the Validator Service to store the data it parses from the PCL files. By default, the **BackEnd** setting is set to **OnBase**, meaning that the parsed data is stored in your OnBase database. To have the parsed data stored in XML files instead, set this option to **XML**.
AnalysisArea	Set this option to the location of your **Analysis** folder, which stores the PCL files that could not be processed, for troubleshooting purposes. By default, the Report Capture installation creates your **Analysis** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Analysis** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Analysis** (in a 64-bit environment)
RemoveHeaderTrailerFile	This option controls whether the Validator Service deletes the **Header** and **Trailer** components of reports after processing them. By default, the **RemoveHeaderTrailerFile** setting is set to **true**, meaning that the Validator Service removes reports' **Header** and **Trailer** files after parsing their data. To prevent the Validator Service from deleting these files, set this option to **false**.
RetryTimeInterval	Set this option equal to the number of seconds you would like the Validator Service to wait before attempting to parse data from the PCL files. The value may need to be adjusted to allow the Importer Service more time to finish printing the PCL files. By default, the **RetryTimeInterval** setting is set to **1**, meaning that the Validator Service will wait one second before attempting to parse data from the PCL files.

Application Settings	Description
AnalysisFileSize	Set this option equal to the minimum file size (in bytes) a PCL file must be before the Validator Service parses its data. If a PCL file does not meet this minimum size, it is automatically sent to the **Analysis** folder. This option prevents blank files from being processed. By default, the **AnalysisFileSize** setting is set to **1024**, meaning that a PCL file must be at least 1024 bytes (1 KB) in order to be processed by the Validator Service.
PCLFileType	Set this option equal to the OnBase file type number of documents imported to OnBase by Report Capture. This value can be set to any OnBase file type. By default, the **PCLFileType** setting is set to **46**. This is the recommended setting.
Interval	Set this option equal to the number of milliseconds you would like the main service thread to wait before checking for new work to be performed by the Validator Service. By default, the **Interval** setting is set to **6000**, meaning that the main service thread checks for new work to be performed by the Validator Service every six seconds.
RemoveBlankFile	This option controls whether blank PCL files of Meditech reports are stored in the **backup** folder or discarded. By default, the **RemoveBlankFile** setting is set to **true**, meaning that blank PCL files will be removed from both the **backup** and **primary** folders. To have blank PCL files stored in the **backup** folder (but still removed from the **primary** folder), set this option to **false**.
EnableEncryption	This option controls whether the PCL files of Meditech reports created by the Importer Service are encrypted in the **backup** and **Staging** folders. Encrypting these files helps to protect data and ensure compliance with HIPAA standards. By default, the **EnableEncryption** setting is set to **true**, meaning that the PCL files will be encrypted. To disable encryption, set this option to **false**.
ExternalSystemID	Set this value to the ID of the external Meditech system the Validator serves. The default value of this setting is **2**, which corresponds with the default Meditech system

Modifying the Scripting Tray's Configuration File

To modify settings that correspond to the Report Capture Scripting Tray, open the **Hyland.Applications.ReportCapture.RCScriptingTray.exe.config** file.

Application Settings	Description
AppServerUrl	Set this option to the URL of your OnBase Application Server. For example: **http://ServerName/ApplicationServer/service.asmx**
DataSource	Set this option to the name of the ODBC connection to your OnBase database.
UserName	Set this option to the user name of the service account used to run Report Capture.
Password	Set this option to the password of the service account used to run Report Capture.
Interval	Set this option equal to the number of milliseconds you would like the main service thread to wait before checking for new work to be performed by the Scripting Tray. By default, the **Interval** setting is set to **15000**, meaning that the main service thread checks for new work to be performed by the Scripting Tray every 15 seconds.
ReportDefsFile	Set this option to the fully qualified name of your **ReportDefs.xml** file, which contains the script schema that defines the scripting activities for your solution. By default, the Report Capture installation sets this fully qualified name in the location where Report Capture was installed and points to the **ReportDefs.xml** file, which you must create manually and place in this same location. The following are examples of the default fully qualified names set during installation: • **C:\Program Files\Hyland\Report Capture\ReportDefs\ ReportDefs.xml** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\ReportDefs\ ReportDefs.xml** (in a 64-bit environment)

Application Settings	Description
ReportsPath	Set this option to the location of your **Reports** folder, which is the parent folder of the child folders (i.e., **Failed** and **Success**) that store failed and successful request files. By default, the Report Capture installation creates your **Reports** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Reports** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Reports** (in a 64-bit environment)
FailedPath	Set this option to the location of your **Failed** folder, which stores failed request files. **Note:** The filenames of the failed request files are altered to include timestamps. By default, the Report Capture installation creates your **Failed** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Reports\Failed** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Reports\ Failed** (in a 64-bit environment)
SuccessPath	Set this option to the location of your **Success** folder, which stores successful request files if the **DeleteRequestFiles** setting is set to **false**. If the **DeleteRequestFiles** setting is set to **true**, no files are stored in the **Success** folder. **Note:** The filenames of the successful request files are altered to include timestamps. By default, the Report Capture installation creates your **Success** folder in one of the following locations: • **C:\Program Files\Hyland\Report Capture\Reports\Success** (in a 32-bit environment) • **C:\Program Files (x86)\Hyland\Report Capture\Reports\ Success** (in a 64-bit environment)

Application Settings	Description
ScriptingPrinterName	Set this option to the name of the printer configured to use the Importer Service (e.g., a printer using the PCL 5 print driver).
ScriptingPort	Set this option equal to the port on which the Scripting Tray will receive requests from the Polling Service.
DeleteRequestFiles	This option controls whether successful request files are deleted after processing. By default, the **DeleteRequestFiles** setting is set to **false**, meaning that successful request files are not deleted after processing (and thus are stored in the **Success** folder). To delete these files after processing so that nothing is stored in the **Success** folder, set this option to **true**.
MeditechPrinterName	Set this option to the name of the printer configured to use the Importer Service in your Meditech system (e.g., a printer using the HP Laserjet 4 print driver).
PrinterTimeout	Set this option equal to the number of milliseconds you would like the Scripting Tray to wait for the print queue to become empty before proceeding. If the print queue is not empty when the service checks it, an exception is thrown and the batch stops processing. By default, the **PrinterTimeout** setting is set to **60000**, meaning that the Scripting Tray checks to ensure that the print queue is empty every 60 seconds.
HooksPort	Set this option equal to the port on which the Scripting Tray listens for evidence from the Hooks component.

Application Settings	Description
DefaultEvidenceTimeout	Set this option equal to the default number of milliseconds you would like to give ReportDef actions to complete before throwing an exception. **Note:** If a ReportDef action has an individual timeout defined in the **ReportDefs.xml** file, the individual timeout overrides the **DefaultEvidenceTimeout** setting. By default, the **DefaultEvidenceTimeout** setting is set to **10000**, meaning that ReportDef actions without individual timeout settings have 10 seconds to complete.
UsePlaceholders	This option controls whether placeholders should be used to test the Scripting Tray when reports cannot be scripted from an external system. By default, the **UsePlaceholders** setting is set to **false**, meaning that placeholders will not be used to test the Scripting Tray. To set placeholders to be used for testing, set this option to **true**.
CleanupTimeout	Set this option equal to the number of milliseconds you would like to allow the **Cleanup** report type (i.e., from the **ReportDefs.xml** configuration file) to stop and close the specified applications and services once the Scripting Tray has finished processing the script. If these applications and services have not been closed within the allotted time, an exception is thrown and all scripting activity is stopped. By default, the **CleanupTimeout** setting is set to **5000**, meaning that the **Cleanup** report type has five seconds to complete its work. For more information on the **Cleanup** report type, see The RCReportDef Parent Element on page 179.
ScreenWriteTimeout	Set this value to the number of milliseconds you want the Scripting Tray to wait for Hook Server calls to stop being processed before continuing with the next step. By default, this value is set to **30** milliseconds.

Application Settings	Description
FileSystemWatcherResetInterations	Set this option to the number of six-second intervals the file system watcher should wait before resetting itself when no files are found within the location configured in the **ReportsPath** setting. By default, this value is set to **100** six-second intervals.
FileReadRetryMilliseconds	Set this option to the number of milliseconds to wait before the file system watcher checks for new reports in the location configured in the **ReportsPath** setting. By default, this value is set to **1000** milliseconds.

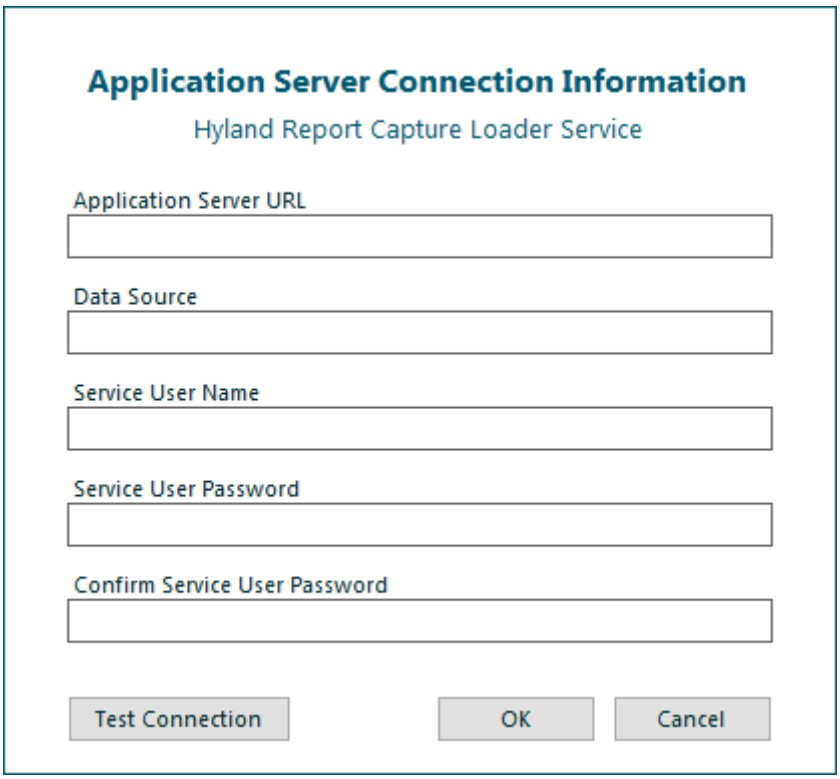
<System.diagnostics> Settings	Description
hylandTracing	This switch controls error tracing through the Diagnostics Console. Set this switch equal to the number representing the desired level of tracing detail. • **0:** no error tracing • **1:** minimal • **2:** normal • **3:** detailed • **4:** verbose By default, the **hylandTracing** setting is set to **3**, meaning that detailed error messages will be logged in the Diagnostics Console.

Modifying the Service's Application Server Settings

To modify Application Server settings requiring encryption that correspond to each Report Capture component:

1. Open the **Report Capture <Report Capture component> Service Configuration** shortcut. The **Application Server Connection Information** dialog box is displayed.

Note: The screen shot used in this section is for illustrative purposes only and reflect the Hyland Report Capture Loader Service **Application Server Connection Information** dialog box. The configuration application shortcut you open will reflect the name of the component you selected.



2. Edit the following Application Server settings.

Setting	Description
Application Server URL	The URL of your OnBase Application Server. For example: **http://ServerName/ApplicationServer/service.asmx**
Data Source	The data source name configured for your Application Server.
Service User Name	The OnBase Service Account user name used to run Report Capture.
Service User Password	The OnBase Service Account password used to run Report Capture.

Setting	Description
Confirm Service User Password	The OnBase Service Account password used to run Report Capture entered again for confirmation.

3. Click **Test Connection** to test your connection to the Application Server using the information you entered.
4. Click **OK**. The Application Server connection information is added to the component's configuration file as encrypted text.

Troubleshooting

Common Issues

Scripting Tray Exceptions

When running the scripting engine through the Report Capture Scripting Tray application, a variety of exceptions may occur. Depending on the type and cause of the exception, the scripting engine may continue processing without disruption or stop processing and require a manual restart of the Scripting Tray application.

When an error causes the scripting engine to stop processing, the Scripting Tray icon in the taskbar is marked with a red error symbol:

A tool tip and descriptive error message are also displayed to help identify the issue. No further requests can be processed until the error is corrected and the Scripting Tray application is restarted. To restart the Scripting Tray, click on its icon in the taskbar and select **Restart Scripting**.

Service-Level Exceptions

When a service-level exception is encountered, a fatal error occurs and stops the scripting engine from processing requests. In this case, an administrator must manually restart the Scripting Tray application by clicking on its icon in the taskbar and selecting **Restart Scripting**.

A batch trailer file containing the error is created and sent to the Validator Service, allowing OnBase to be updated with the error. The batch trailer file can be viewed in the **Analysis** folder of your Report Capture directory. The status of the Report Capture job is also updated in the **Report Capture Administration** window to reflect the error.

Batch-Level Exceptions

Depending on the cause of a batch-level exception, the scripting engine may or may not be stopped. After logging the error in the Diagnostics Console, the scripting engine attempts to run the main cleanup and startup scripts. If either script is missing, the scripting engine is stopped. In this case, an administrator must manually restart the Scripting Tray application by clicking on its icon in the taskbar and selecting **Restart Scripting**.

A batch trailer file containing the error is created and sent to the Validator Service, allowing OnBase to be updated with the error. The batch trailer file can be viewed in the **Analysis** folder of your Report Capture directory. The status of the Report Capture job is also updated in the **Report Capture Administration** window to reflect the error.

Account-Level Exceptions

Depending on the cause of an account-level exception, the scripting engine may or may not be stopped. After logging the error in the Diagnostics Console, the scripting engine attempts to run the cleanup script. If the script is missing, the scripting engine is stopped. In this case, an administrator must manually restart the Scripting Tray application by clicking on its icon in the taskbar and selecting **Restart Scripting**.

The Scripting Tray adds the error to the request header file for the current patient so that the request status can be updated in OnBase. The request header file can be viewed in the **Analysis** folder of your Report Capture directory. The status of the Report Capture job is also updated in the **Report Capture Administration** window to reflect the error.

Report-Level Exceptions

A report-level exception occurs when the scripting engine determines that a report is missing. When this type of exception is thrown, the scripting engine is stopped, and an administrator must manually restart the Scripting Tray application by clicking on its icon in the taskbar and selecting **Restart Scripting**.

After removing the document data from the batch list, the scripting engine attempts to run the cleanup script for the specified report. If the recovery script is run, the scripting engine proceeds to script the next report. If the cleanup report does not exist, however, a report-level exception occurs, the scripting engine is stopped, and the error is logged in the Diagnostic Console.

Error Logging

All diagnostic and error logging information is logged and viewed in the Diagnostics Console.

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.

Overview

The **ReportDefs.xml** configuration file contains the scripting actions and functions that will be used to generate reports from your Meditech 6.0 system and print them into your OnBase system. This file must be manually created and edited by an administrator, and it must be stored in the location where Report Capture was installed. For example:

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

For information on the elements and settings contained within the ReportDefs configuration file, see Elements of the ReportDefs Configuration File on page 177.

Sample ReportDefs Configuration File

The following is a sample ReportDefs configuration file that could be used to define scripting actions in a particular Report Capture solution for Meditech 6.0. Note that this is only a sample for reference; your ReportDefs configuration file must be configured to apply to your specific solution.

```
<RCReportDefs>
  <RCReportDef name="Startup">
    <Action order="5" actionType="StartApplication">
    <StartApplicationData processName="HookSrv" fileName="HookSrv.exe"
workingDirectory="C:\Hooks" millisecondsToWait="15000" errorString="Unable
to start Hook Engine" errorScope="Service" />
  </RCReportDef>


  <RCReportDef name="OLD_FMP_PRINTING">
    <Action order="10" actionType="FindWindow" >
    <FindWindowData windowName="ABC Test M-AT HCIS" errorString="Meditech
is not running." errorScope="Service" />
    </Action>
    <!--<Action order="10" actionType="FindWindow" >
      <FindWindowData windowName="ABC Test M-AT HCIS"
millisecondsToWait="1000"
                      errorString="Meditech is not running."
errorScope="Service"
```

```
                        evidenceTimeoutMS="1000">
          <PositiveEvidence evidence="Clinical" />
        </FindWindowData>
      </Action>-->
      <Action order="20" actionType="SendFunctionKey">
        <SendFunctionKeyData keyToSend="ESC" timesToSend="1"
millisecondsToWait="0" />
      </Action>
      <Action order="30" actionType="SendFunctionKey">
        <SendFunctionKeyData keyToSend="RIGHT" timesToSend="1"
millisecondsToWait="0" />
      </Action>
      <Action order="40" actionType="SendFunctionKey">
        <SendFunctionKeyData keyToSend="DOWN" timesToSend="2"
millisecondsToWait="0" />
      </Action>
      <Action order="50" actionType="SendFunctionKey">
        <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
millisecondsToWait="0" />
      </Action>
      <Action order="55" actionType="WaitForScreen">
        <WaitForScreenData screenName="PCS Status Board" attach="true"
millisecondsToWait="50"
                           errorString="PCS Status Board not found."
errorScope="Service" />
      </Action>
      <Action order="60" actionType="SendFunctionKey">
        <SendFunctionKeyData keyToSend="DOWN" timesToSend="2"
millisecondsToWait="0"/>
      </Action>
      <Action order="70" actionType="SendFunctionKey">
        <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
millisecondsToWait="0"/>
      </Action>
      <Action order="80" actionType="SendFunctionKey">
        <SendFunctionKeyData keyToSend="DOWN" timesToSend="1"
millisecondsToWait="0" />
```

```
    </Action>
    <Action order="90" actionType="SendFormat">
      <SendFormatData stringToSend="Account {0} is ready for processing."
valuesCount="1" hitEnter="0" millisecondsToWait="0" errorString="Account
{0} not found." errorScope="Account">
        <ValueKey sequence="0" name="acct"/>
      </SendFormatData>
    </Action>
    <Action order="110" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F11" timesToSend="1"
millisecondsToWait="50"/>
    </Action>
    <Action order="120" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
millisecondsToWait="250"/>
    </Action>
    <Action order="130" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F8" timesToSend="1"
millisecondsToWait="0"/>
    </Action>
    <Action order="140" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="DOWN" timesToSend="5"
millisecondsToWait="0"/>
    </Action>
    <Action order="150" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
millisecondsToWait="0"/>
    </Action>
    <Action order="160" actionType="ClickButton">
      <ClickButtonData screenArea="MainMenu" buttonName="PATSELECT"
millisecondsToWait="0" />
    </Action>
    <Action order="170" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F8" timesToSend="2"
millisecondsToWait="0" />
    </Action>
    <Action order="180" actionType="SendFunctionKey">
```

```
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
millisecondsToWait="25" />
    </Action>
    <Action order="190" actionType="SendInput">
      <SendInputData stringToSend="PCS Archive Report" hitEnter="1"
millisecondsToWait="250"
                     errorString="PCS Archive Report not found for account."
errorScope="Ignore"/>
    </Action>
    <Action order="200" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F12" timesToSend="1"
millisecondsToWait="0" />
    </Action>
    <Action order="210" actionType="WaitForScreen">
      <WaitForScreenData screenName="Print Destination" attach="true"
millisecondsToWait="0"
                         errorString="Printing Failed" errorScope="Service"/
>
    </Action>
    <Action order="220" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F12" timesToSend="1"
millisecondsToWait="0" />
    </Action>
    <!--Action order="230" actionType="WaitForWindowClose">
      <WaitForWindowCloseData screenName="Print Destination"
millisecondsToWait="0"
                              errorString="Printing Failed To Close"
errorScope="Service"/>
    </Action-->
    <Action order="232" actionType="WaitForScreen">
      <WaitForScreenData screenName=" - HIM Dept:" attach="false"
millisecondsToWait="250"
                              errorString="Print Progress Window not found"
errorScope="Ignore"/>
    </Action>
    <Action order="233" actionType="FindWindow">
      <FindWindowData windowName=" - HIM Dept:" millisecondsToWait="0"
```

```
                          errorString="Print Progress Window not found"
errorScope="Ignore"/>
    </Action>
    <Action order="234" actionType="WaitForWindowClose">
      <WaitForWindowCloseData screenName=" - HIM Dept:"
millisecondsToWait="25"
                          errorString="Printing Failed To Close"
errorScope="Ignore"/>
    </Action>
    <Action order="240" actionType="WaitForScreen">
      <WaitForScreenData screenName="PCS Status Board" attach="true"
millisecondsToWait="250"
                          errorString="PCS Status Board not found after
printing" errorScope="Service"/>
    </Action>
    <Action order="250" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F4" timesToSend="1" modifier="Alt"
millisecondsToWait="0" />
    </Action>
    <Action order="260" actionType="WaitForWindowClose">
      <WaitForWindowCloseData screenName="PCS Status Board"
millisecondsToWait="0"
                          errorString="PCS Status board failed to close"
errorScope="Service"/>
    </Action>
    <Action order="270" actionType="WaitForScreen">
      <WaitForScreenData screenName="ABC Test M-AT HCIS" attach="true"
millisecondsToWait="0"
                         errorString="Meditech is not running."
errorScope="Ignore" />
    </Action>
    <Action order="280" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ESC" timesToSend="2"/>
    </Action>
  </RCReportDef>
  <RCReportDef name="TinyDef">
    <Action order="10" actionType="FindWindow" >
```

```
      <FindWindowData windowName="ABC Test M-AT HCIS" errorString="Meditech
is not running." errorScope="Service" />
    </Action>
    <!--Action order="20" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ESC" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="Clinical I" />
      </SendFunctionKeyData>
    </Action-->
    <Action order="20" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ESC" timesToSend="1">
      </SendFunctionKeyData>
    </Action>
    <Action order="30" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="RIGHT" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="PCS Status Board" />
      </SendFunctionKeyData>
    </Action>
    <Action order="40" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="DOWN" timesToSend="2" />
    </Action>
    <Action order="50" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="7000">
        <PositiveEvidence evidence="Status Board" />
      </SendFunctionKeyData>
    </Action>
    <Action order="55" actionType="WaitForScreen">
      <WaitForScreenData screenName="PCS Status Board" attach="true"
                         errorString="PCS Status Board not found."
errorScope="Service" />
    </Action>
    <Action order="60" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="DOWN" timesToSend="2" />
    </Action>
```

```
    <Action order="70" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="5000" >
        <PositiveEvidence evidence="Account Num" />
      </SendFunctionKeyData>
    </Action>
    <Action order="80" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="DOWN" timesToSend="1"/>
    </Action>
    <Action order="90" actionType="SendFormat">
      <SendFormatData stringToSend="Account {0} is ready for processing."
valuesCount="1" hitEnter="0" errorString="Account {0} not found."
errorScope="Account">
        <ValueKey sequence="0" name="acct"/>
      </SendFormatData>
    </Action>
    <Action order="110" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F11" timesToSend="1"
errorString="Account {0} not found." errorScope="Account"
evidenceTimeoutMS="5000">
        <ValueKey sequence="0" name="acct"/>
        <PositiveEvidence evidence="Account Number matches" />
        <NegativeEvidence evidence="No matches found" hitMessage="Account
not found." />
      </SendFunctionKeyData>
    </Action>
    <Action order="120" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="Patient Reports" />
      </SendFunctionKeyData>
    </Action>
    <Action order="130" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F8" timesToSend="1" />
    </Action>
    <Action order="140" actionType="SendFunctionKey">
```

```
      <SendFunctionKeyData keyToSend="DOWN" timesToSend="5" />
    </Action>
    <Action order="150" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="Report" />
      </SendFunctionKeyData>
    </Action>
    <Action order="160" actionType="ClickButton">
      <ClickButtonData screenArea="MainMenu" buttonName="PATSELECT"
evidenceTimeoutMS="1000">
        <PositiveEvidence evidence="Report" />
      </ClickButtonData>
    </Action>
    <Action order="170" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F8" timesToSend="2" />
    </Action>
    <Action order="180" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="Select Report Parameters" />
      </SendFunctionKeyData>
    </Action>
    <Action order="190" actionType="SendInput">
      <SendInputData stringToSend="PCS Archive Report" hitEnter="1"
millisecondsToWait="250"
                     errorString="PCS Archive Report not found for account."
errorScope="Report" evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="  OK  " />
        <NegativeEvidence evidence="No matches found" hitMessage="PCS
Archive Report not found." />
      </SendInputData>
    </Action>
    <Action order="200" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F12" timesToSend="1"
evidenceTimeoutMS="5000">
```

```
        <PositiveEvidence evidence="Print" />
      </SendFunctionKeyData>
    </Action>
    <!--Remove This-->
    <Action order="210" actionType="WaitForScreen">
      <WaitForScreenData screenName="Print Destination" attach="true"
                         errorString="Printing Failed" errorScope="Service"/
>
    </Action>
    <Action order="220" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F12" timesToSend="1"
evidenceTimeoutMS="20000">
        <PositiveEvidence evidence="Room" />
      </SendFunctionKeyData>
    </Action>
    <!--Action order="232" actionType="WaitForScreen">
      <WaitForScreenData screenName=" - HIM Dept:" attach="false"
millisecondsToWait="250"
                         errorString="Print Progress Window not found"
errorScope="Ignore"/>
    </Action>
    <Action order="233" actionType="FindWindow">
      <FindWindowData windowName=" - HIM Dept:"
                         errorString="Print Progress Window not found"
errorScope="Ignore"/>
    </Action>
    <Action order="234" actionType="WaitForWindowClose">
      <WaitForWindowCloseData screenName=" - HIM Dept:"
millisecondsToWait="25"
                         errorString="Printing Failed To Close"
errorScope="Ignore"/>
    </Action-->
    <!--Remove This-->
    <Action order="240" actionType="WaitForScreen">
      <WaitForScreenData screenName="PCS Status Board" attach="true"
millisecondsToWait="250"
```

```
                          errorString="PCS Status Board not found after
printing" errorScope="Service"/>
    </Action>
    <Action order="250" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F4" timesToSend="1" modifier="Alt"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="PCS Status Board"/>
      </SendFunctionKeyData>
    </Action>
    <!--Remove This-->
    <Action order="260" actionType="WaitForWindowClose">
      <WaitForWindowCloseData screenName="PCS Status Board"
                          errorString="PCS Status board failed to close"
errorScope="Service"/>
    </Action>
    <Action order="270" actionType="WaitForScreen">
      <WaitForScreenData screenName="ABC Test M-AT HCIS" attach="true"
                         errorString="Meditech is not running."
errorScope="Ignore" />
    </Action>
    <Action order="280" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ESC" timesToSend="2"
evidenceTimeoutMS="1">
        <PositiveEvidence evidence="Clinical I" />
      </SendFunctionKeyData>
    </Action>
  </RCReportDef>
  <RCReportDef name="FMP_PRINTING">
    <Action order="10" actionType="FindWindow" >
     <FindWindowData windowName="ABC Test M-AT HCIS" errorString="Meditech
is not running." errorScope="Service" />
    </Action>
    <!--Action order="20" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ESC" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="Clinical I" />
```

```
      </SendFunctionKeyData>
    </Action-->
    <Action order="20" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ESC" timesToSend="1">
      </SendFunctionKeyData>
    </Action>
    <Action order="30" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="RIGHT" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="PCS Status Board" />
      </SendFunctionKeyData>
    </Action>
    <Action order="40" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="DOWN" timesToSend="2" />
    </Action>
    <Action order="50" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="7000">
        <PositiveEvidence evidence="Status Board" />
      </SendFunctionKeyData>
    </Action>
    <Action order="55" actionType="WaitForScreen">
      <WaitForScreenData screenName="PCS Status Board" attach="true"
                         errorString="PCS Status Board not found."
errorScope="Service" />
    </Action>
    <Action order="60" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="DOWN" timesToSend="2"/>
    </Action>
    <Action order="70" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="5000" >
        <PositiveEvidence evidence="Account Num" />
      </SendFunctionKeyData>
    </Action>
```

```
    <Action order="80" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="DOWN" timesToSend="1"/>
    </Action>
    <Action order="90" actionType="SendFormat">
      <SendFormatData stringToSend="Account {0} is ready for processing."
valuesCount="1" hitEnter="0" errorString="Account {0} not found."
errorScope="Account">
        <ValueKey sequence="0" name="acct"/>
      </SendFormatData>
    </Action>
    <Action order="110" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F11" timesToSend="1"
errorString="Account {0} not found." errorScope="Account"
evidenceTimeoutMS="5000">
        <ValueKey sequence="0" name="acct"/>
        <PositiveEvidence evidence="Account Number matches" />
        <NegativeEvidence evidence="No matches found" hitMessage="Account
not found." />
      </SendFunctionKeyData>
    </Action>
    <Action order="120" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="Patient Reports" />
      </SendFunctionKeyData>
    </Action>
    <Action order="130" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F8" timesToSend="1" />
    </Action>
    <Action order="140" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="DOWN" timesToSend="5" />
    </Action>
    <Action order="150" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="Report" />
```

```
      </SendFunctionKeyData>
    </Action>
    <Action order="160" actionType="ClickButton">
      <ClickButtonData screenArea="MainMenu" buttonName="PATSELECT"
evidenceTimeoutMS="1000">
        <PositiveEvidence evidence="Report" />
      </ClickButtonData>
    </Action>
    <Action order="170" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F8" timesToSend="2" />
    </Action>
    <Action order="180" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ENTER" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="Select Report Parameters" />
      </SendFunctionKeyData>
    </Action>
    <Action order="190" actionType="SendInput">
      <SendInputData stringToSend="PCS Archive Report" hitEnter="1"
millisecondsToWait="250"
                     errorString="PCS Archive Report not found for account."
errorScope="Report" evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="  OK  " />
        <NegativeEvidence evidence="No matches found" hitMessage="PCS
Archive Report not found." />
      </SendInputData>
    </Action>
    <Action order="200" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F12" timesToSend="1"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="Print" />
      </SendFunctionKeyData>
    </Action>
    <!--Remove This-->
    <Action order="210" actionType="WaitForScreen">
      <WaitForScreenData screenName="Print Destination" attach="true"
```

```
                        errorString="Printing Failed" errorScope="Service"/
>
    </Action>
    <Action order="220" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F12" timesToSend="1"
evidenceTimeoutMS="20000">
        <PositiveEvidence evidence="Room" />
      </SendFunctionKeyData>
    </Action>
    <!--Action order="232" actionType="WaitForScreen">
      <WaitForScreenData screenName=" - HIM Dept:" attach="false"
millisecondsToWait="250"
                         errorString="Print Progress Window not found"
errorScope="Ignore"/>
    </Action>
    <Action order="233" actionType="FindWindow">
      <FindWindowData windowName=" - HIM Dept:"
                         errorString="Print Progress Window not found"
errorScope="Ignore"/>
    </Action>
    <Action order="234" actionType="WaitForWindowClose">
      <WaitForWindowCloseData screenName=" - HIM Dept:"
millisecondsToWait="25"
                         errorString="Printing Failed To Close"
errorScope="Ignore"/>
    </Action-->
    <!--Remove This-->
    <Action order="240" actionType="WaitForScreen">
      <WaitForScreenData screenName="PCS Status Board" attach="true"
millisecondsToWait="250"
                         errorString="PCS Status Board not found after
printing" errorScope="Service"/>
    </Action>
    <Action order="250" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="F4" timesToSend="1" modifier="Alt"
evidenceTimeoutMS="5000">
        <PositiveEvidence evidence="PCS Status Board"/>
```

```
      </SendFunctionKeyData>
    </Action>
    <Action order="260" actionType="WaitForWindowClose">
      <WaitForWindowCloseData screenName="PCS Status Board"
                          errorString="PCS Status board failed to close"
errorScope="Service"/>
    </Action>
    <Action order="270" actionType="WaitForScreen">
      <WaitForScreenData screenName="ABC Test M-AT HCIS" attach="true"
                         errorString="Meditech is not running."
errorScope="Ignore" />
    </Action>
    <Action order="280" actionType="SendFunctionKey">
      <SendFunctionKeyData keyToSend="ESC" timesToSend="2"
evidenceTimeoutMS="1">
        <PositiveEvidence evidence="Clinical I" />
      </SendFunctionKeyData>
    </Action>
  </RCReportDef>

  <RCReportDef name="Cleanup">
    <Action order="5" actionType="EndApplication">
    <EndApplicationData processName="HookSrv" millisecondsToWait="10000"
errorString="Unable to stop Hook Engine" errorScope="Service" />
    </Action>
  </RCReportDef>
</RCReportDefs>
```

Overview

The **ScreenDefs.xml** configuration file contains the elements and settings that configure the specific areas of the screen in which the scripting actions and functions defined in the **ReportDefs.xml** configuration file will be performed. The ScreenDefs file must be manually created and edited by an administrator, and it must be stored in the location where Report Capture was installed. For example:

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

For information on the elements and settings contained within the ScreenDefs configuration file, see Elements of the ScreenDefs Configuration File on page 190.

Sample ScreenDefs Configuration File

The following is a sample ScreenDefs configuration file that could be used to define the areas of the screen in which configured scripting actions could take place in a particular Report Capture solution for Meditech 6.0. Note that this is only a sample for reference; your ScreenDefs configuration file must be configured to apply to your specific solution.

```
<Screens>
  <Screen name="MainMenu" title="ABC Test M-AT">
    <Field name="SCRID" xCoordinate="0" yCoordinate="0" />
  </Screen>
  <Screen name="MainMenu" title="ABC Test M-AT">
    <Field name="SCRID" xCoordinate="0" yCoordinate="0" />
    <Field name="PatSelect" xCoordinate="29" yCoordinate="165" />
  </Screen>
</Screens>
```

OnBase®
Foundation EP5

Report Capture

Administration Guide

Foundation EP5

OnBase Configuration

To configure your OnBase Report Capture solution, you must use the OnBase Configuration module to create and configure specific Keyword Types and Document Types, and set several required settings. Once you finish using OnBase Configuration to set up your Report Capture solution, you can use appropriate script schemata to configure and manage your solution.

Configuring Required Keyword Types

Configure the following Keyword Types:

Keyword Type	Description
Account Number	This Keyword Type will be used to store account numbers, and should already exist in your OnBase system for use with the OnBase for Meditech solution. See your OnBase for Meditech documentation for more information on configuring this Keyword Type.
Medical Record Number	This Keyword Type will be used to store the user's Meditech MRN, and should already exist in your OnBase system for use with the OnBase for Meditech solution. See your OnBase for Meditech documentation for more information on configuring this Keyword Type.
Report URN	This Keyword Type should be configured as an Alphanumeric Keyword Type at least 50 characters long. It will be used to identify unique report names for individual accounts.
Report Mnemonic	This Keyword Type should be configured as an Alphanumeric Keyword Type at least 45 characters long. It will be used to differentiate between different reports of the same report name and account.

Note: All Keyword Type Names are suggestions. If desired, you can use different names when creating these Keyword Types.

For more information on the configuration of Keyword Types, see the System Administration documentation.

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

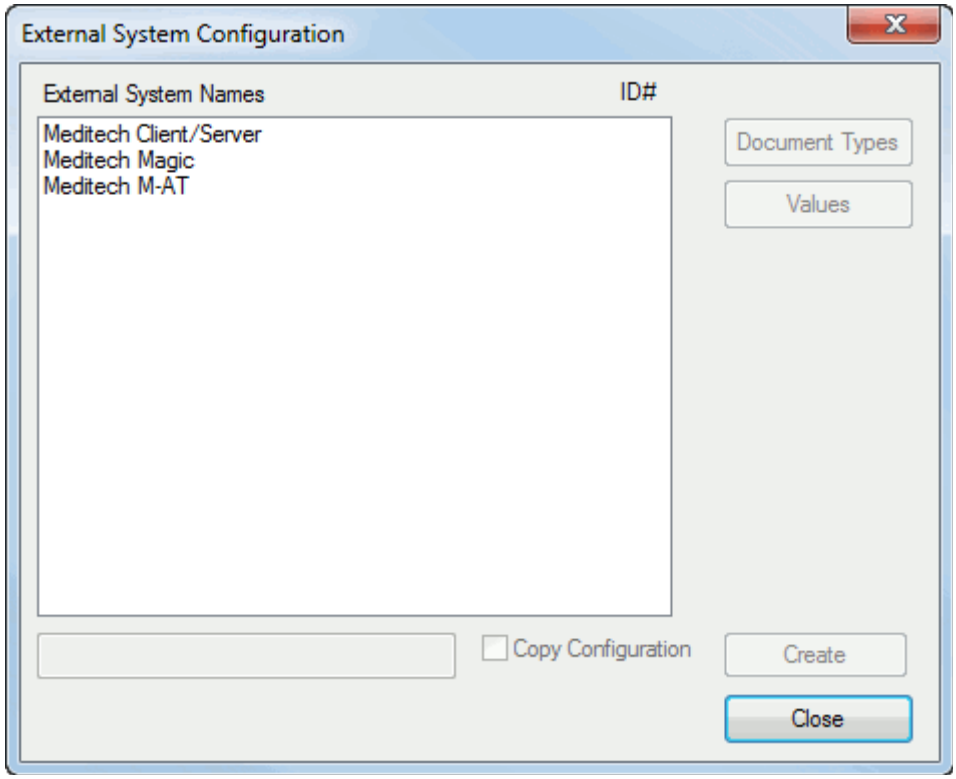
Keyword Type Name	Description	Configuration
Facility Name	The name of the facility in which the patient encounter took place. This Keyword Type must either be mapped to an external Meditech system, to specific Document Types in an external Meditech system, or to Chart Data Fields. See the **OnBase for Meditech with ODA** module reference guide for more information about mapping this Keyword Type to Meditech.	**Data Type**: Alphanumeric **Length**: Varies, depending on configured medical facility names.

Configuring Keyword Types for the Unmapped Form Document Type

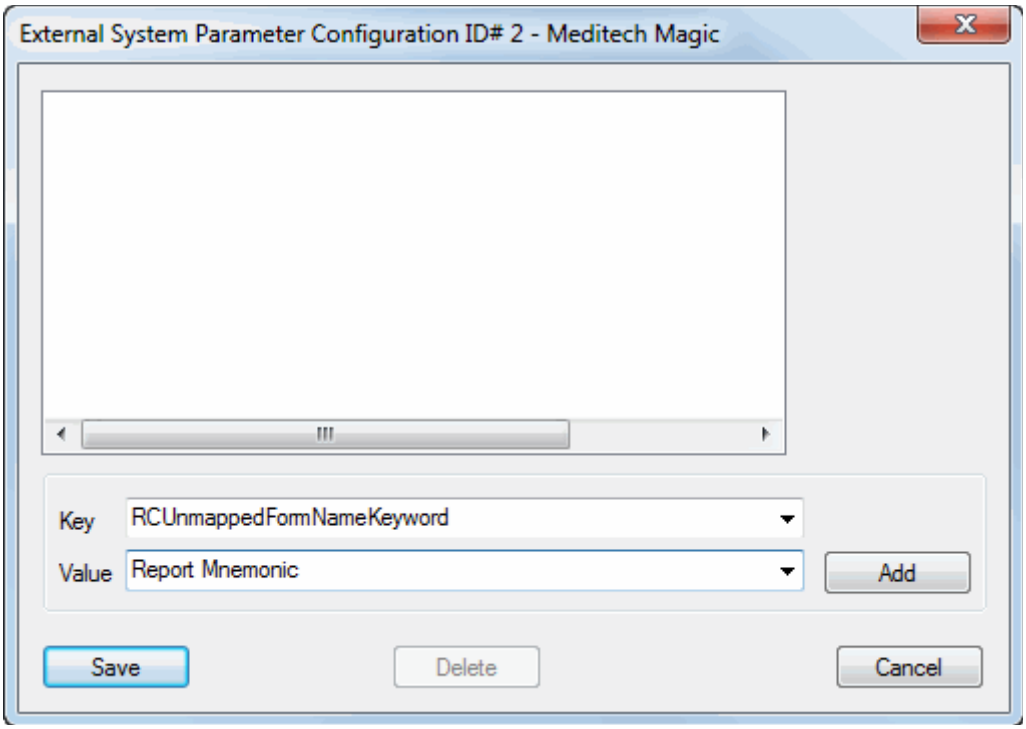
When configuring a Document Type that will be used to store documents that have not been mapped to any specific Document Type (see Configuring the Unmapped Report Document Type on page 158), it is considered a best practice to also configure a Keyword Type that will be used to identify the Meditech form to which the unmapped documents belong, and to assign this Keyword Type to the unmapped Document Type. Once this Keyword Type has been created and properly configured, the appropriate Meditech form will be automatically indexed for this Keyword Type when documents are uploaded into OnBase, thus simplifying the re-indexing process for unmapped documents.

To configure a Keyword Type for the unmapped form Document Type:

1. In OnBase Configuration, create a Document Type that will be used to store documents that have not been mapped to any specific Document Type, and assign the **Report Mnemonic** Keyword to it.
2. Select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



3. Select **Meditech Magic** and click **Values**. The **External System Parameter Configuration ID# 2 - Meditech Magic** dialog is displayed.



4. Type **RCUnmappedFormNameKeyword** in the **Key** field.
5. Type **Report Mnemonic** in the **Value** field.
6. Click **Add**.
7. Click **Save** to return to the **External System Configuration** dialog.
8. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 5 to 8.

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

Configuring Required Document Types

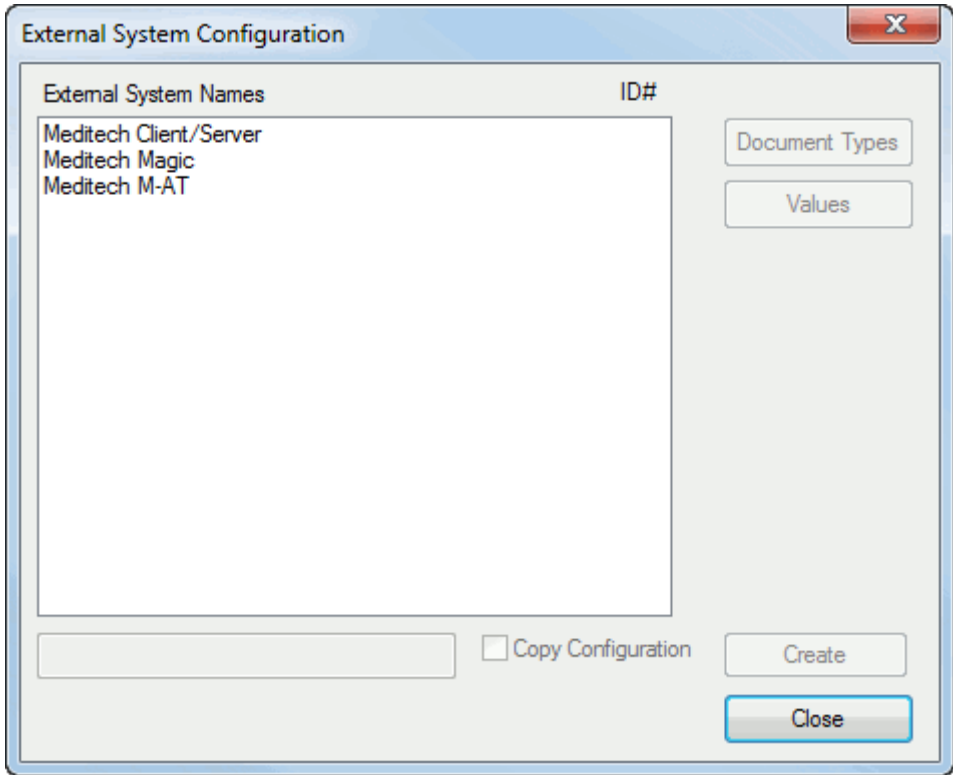
Configure Document Types for the Meditech report types that will be sent to OnBase via Report Capture, as appropriate. Each Document Type must be associated with the **Report URN**, **Medical Record Number**, **Account Number**, and **Report Mnemonic** Keyword Types.

For more information on the configuration of Document Types, see the System Administration documentation.

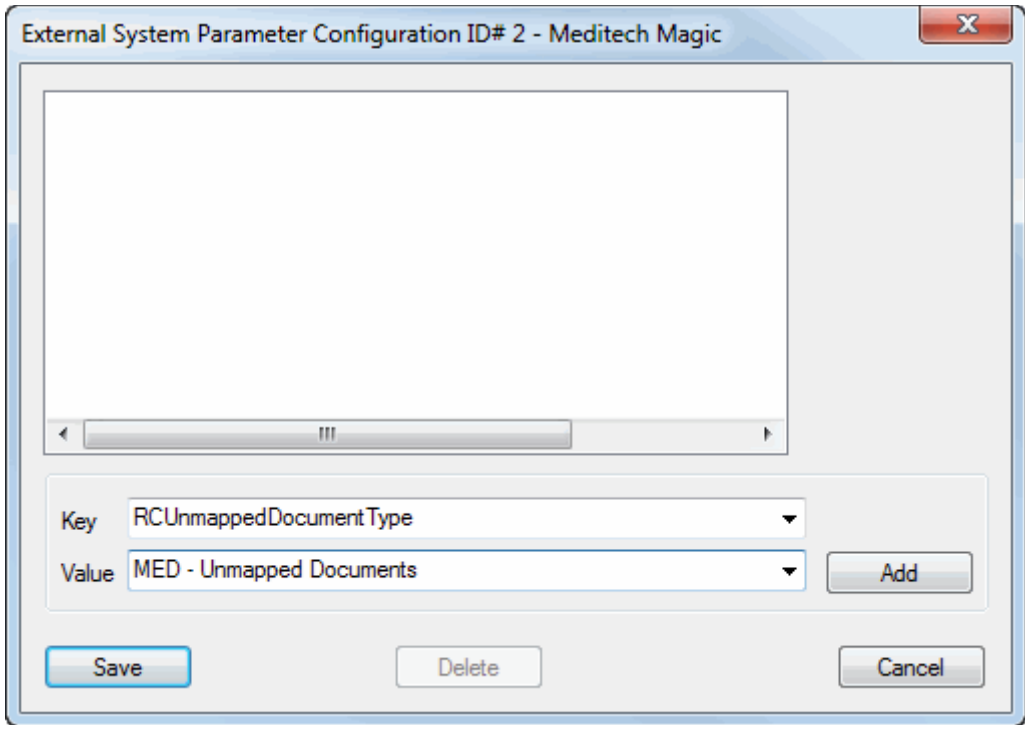
Configuring the Unmapped Report Document Type

You must also configure a Document Type that will be used to store documents that have not been mapped to any specific Document Type. This Document Type must be configured with the **Non Revisable** option, and should be associated with the **Report URN** Keyword Type. Once you have configured this Document Type, you must map it to the appropriate External System Parameter. To do so, follow these steps:

1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



2. Select **Meditech Magic** and click **Values**. The **External System Parameter Configuration ID# 2 - Meditech Magic** dialog is displayed.



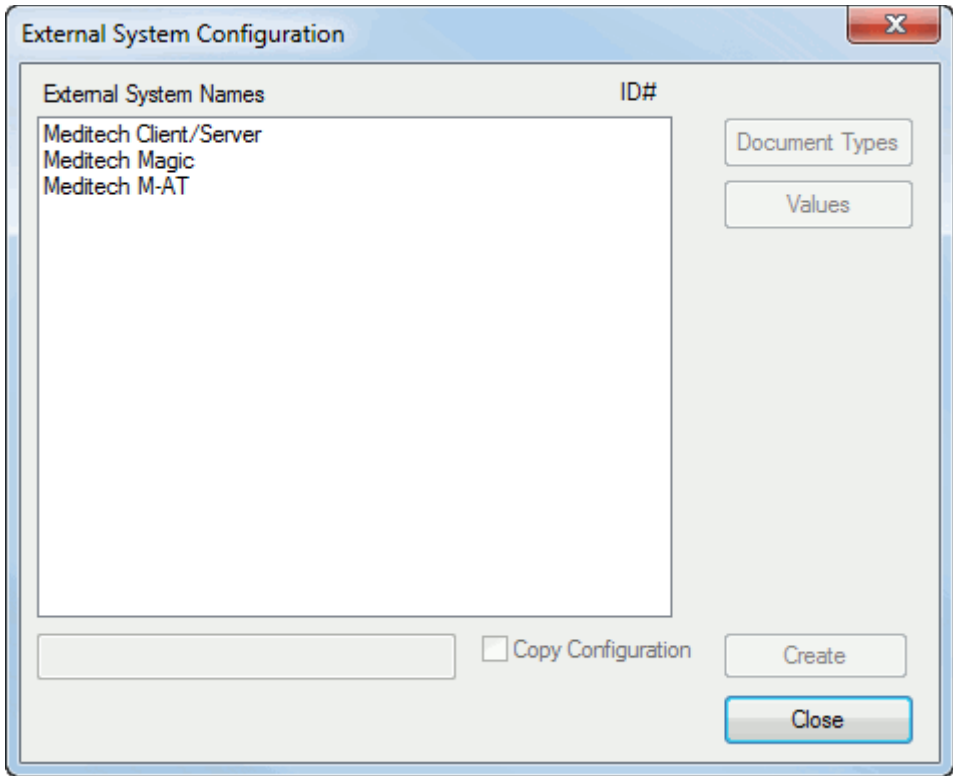
3. Type **RCUnmappedDocumentType** in the **Key** field.
4. Type the exact name of the Document Type you created to store unmapped documents in the **Value** field.
5. Click **Save** to return to the **External System Configuration** dialog.
6. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 3 to 5.

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

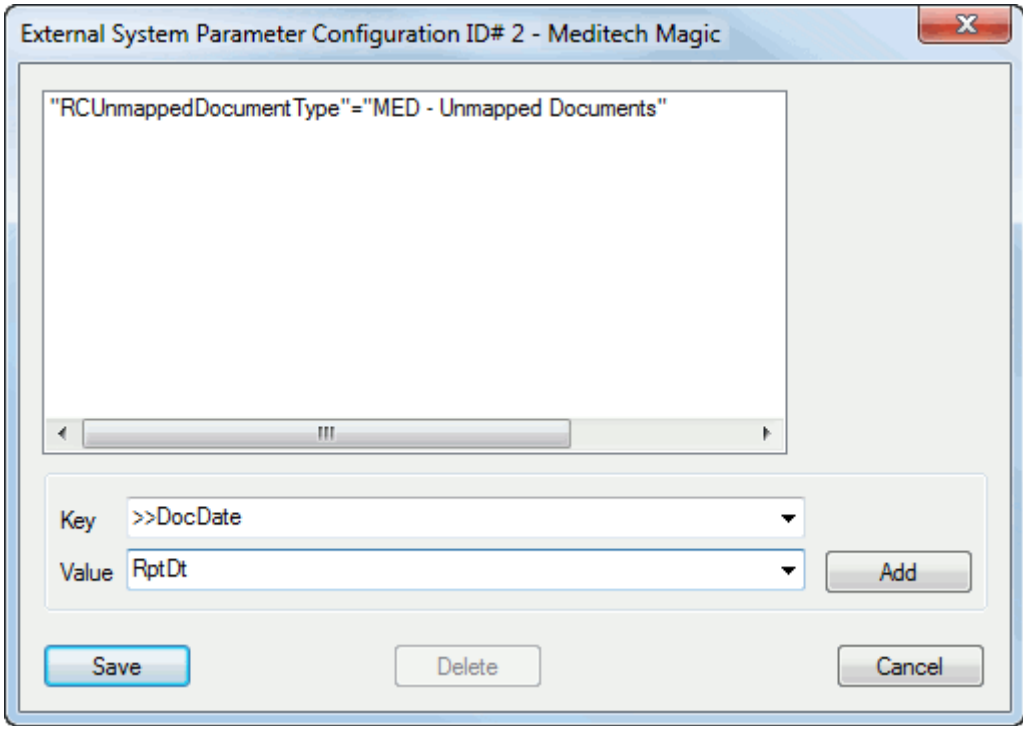
Configuring the Default Document Date

By default, the **Document Date** for documents printed into OnBase is set to the date the document is imported into OnBase. If desired, you can configure your Report Capture solution so that the **Document Date** is automatically set to the date the document was created in Meditech. To do so, follow these steps:

1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



2. Select **Meditech Magic** and click **Values**. The **External System Parameter Configuration ID# 2 - Meditech Magic** dialog is displayed.



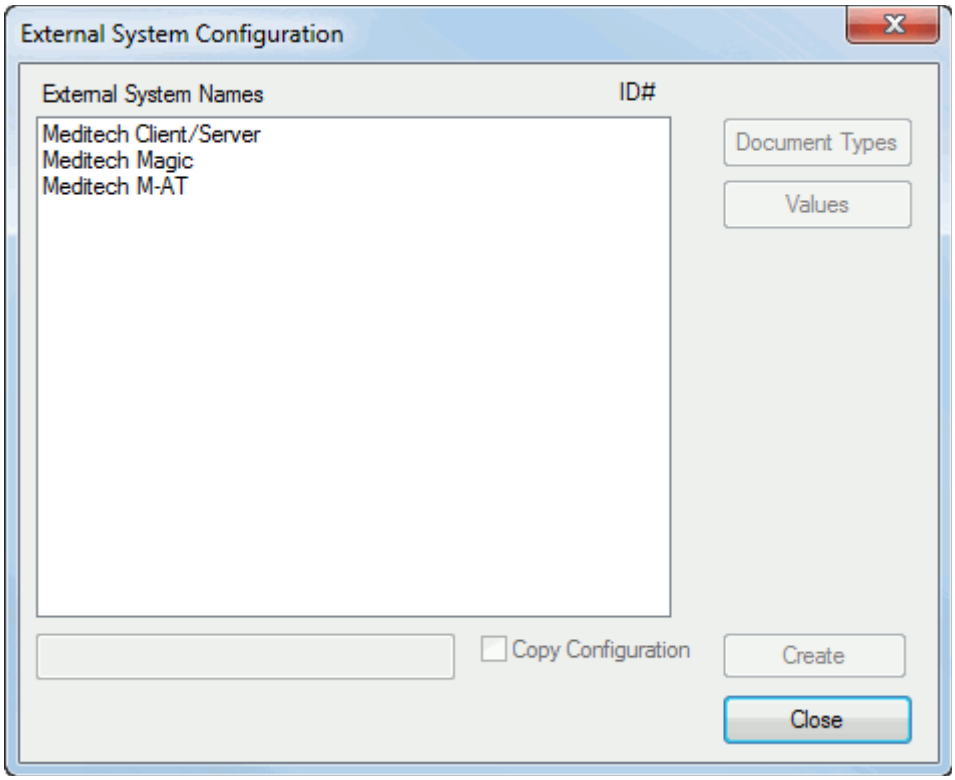
3. Type **>>DocDate** in the **Key** field.
4. Type **RptDt** in the **Value** field.
5. Click **Save** to return to the **External System Configuration** dialog.
6. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 3 to 5.

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

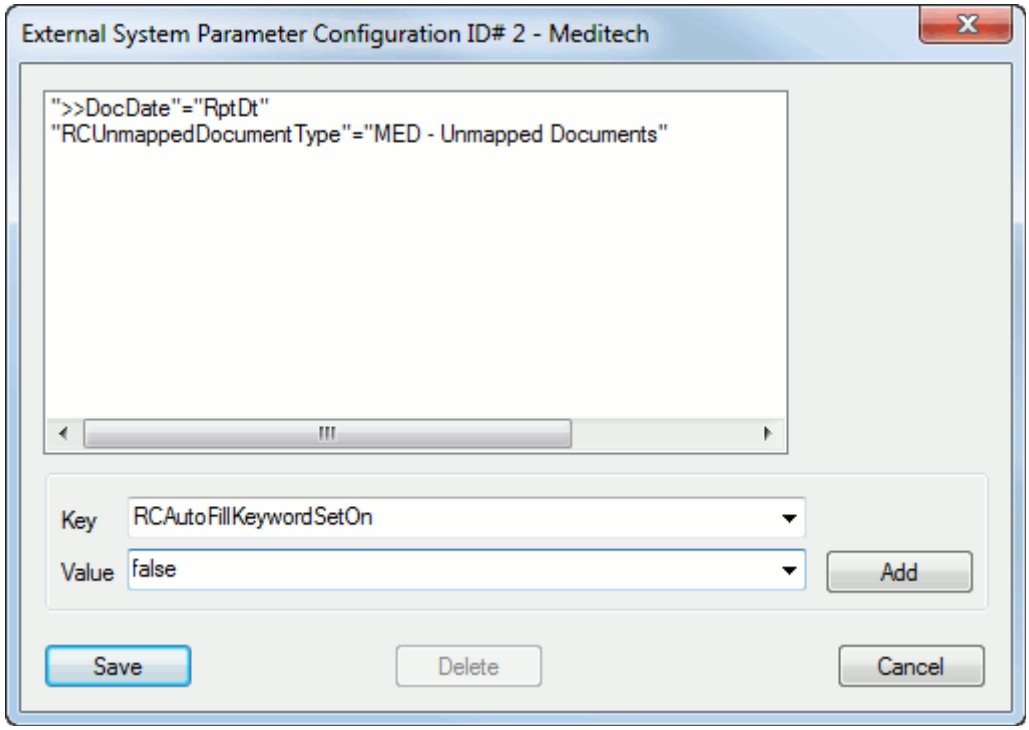
Disabling Indexing Using AutoFill Keyword Sets

By default, your Report Capture solution is configured to automatically index documents using any AutoFill Keyword Set(s) that use any of the required Meditech Keyword Types as the Primary Keyword Value. If you do not want these AutoFill Keyword Sets to be automatically expanded, follow these steps:

1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



2. Select **Meditech Magic** and click **Values**. The **External System Parameter Configuration ID# 2 - Meditech Magic** dialog is displayed.



3. Type **RCAutoFillKeywordSetOn** in the **Key** field.
4. Type **false** in the **Value** field.
5. Click **Save** to return to the **External System Configuration** dialog.
6. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 3 to 5.

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

Configuring Facilities for Meditech Systems

If your solution includes multiple Meditech systems, individual facilities can be configured to allow Report Capture requests from specific Meditech systems. Report Capture requests are processed against the facility with which the patient is associated, and the Meditech external system mappings for that facility are used to determine which Meditech system is associated with that facility.

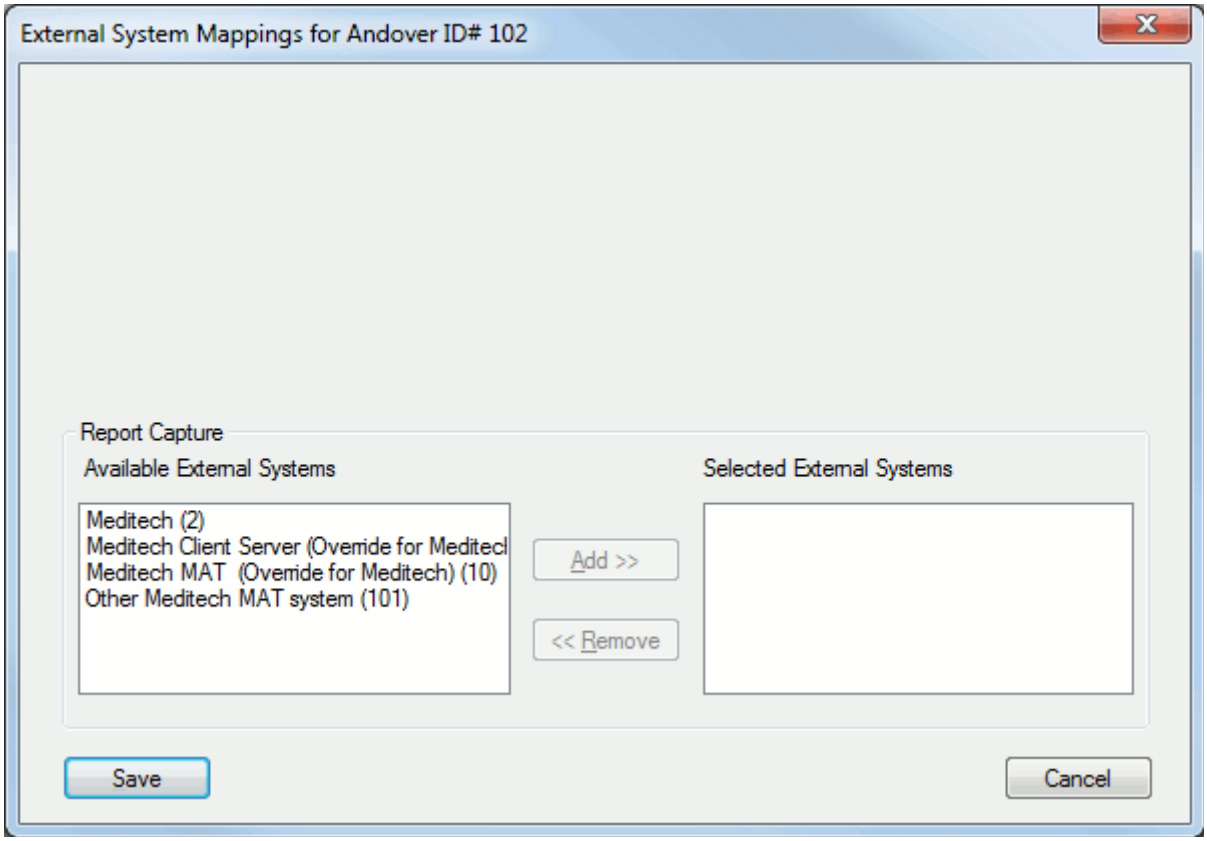
Note: See the **OnBase for Meditech with ODA** module reference guide for more information about configuring facilities for systems of record.

To configure facilities for Meditech systems, complete the following steps:

1. In the Configuration module, select **Medical** | **Facilities** | **Facility Configuration**.

Note: See the **HL7** module reference guide for more information on creating facilities.

2. Select a facility in the **Medical Facility** list, then click **External System**.
   The **External System Mapping for [Facility Name] ID# [Facility ID]** dialog box is displayed.



3. The **Report Capture** section determines which Meditech systems can make Report Capture requests. Add Meditech systems to the **Selected External Systems** list by selecting a Meditech system in the **Available External Systems** list and clicking **Add**.

   Meditech systems can be removed from the **Selected External Systems** list by selecting a Meditech system and clicking **Remove**.

Note: If no external systems are selected in the **Report Capture** section, the default Meditech external systems are used.

4. Click **Save** to finish.

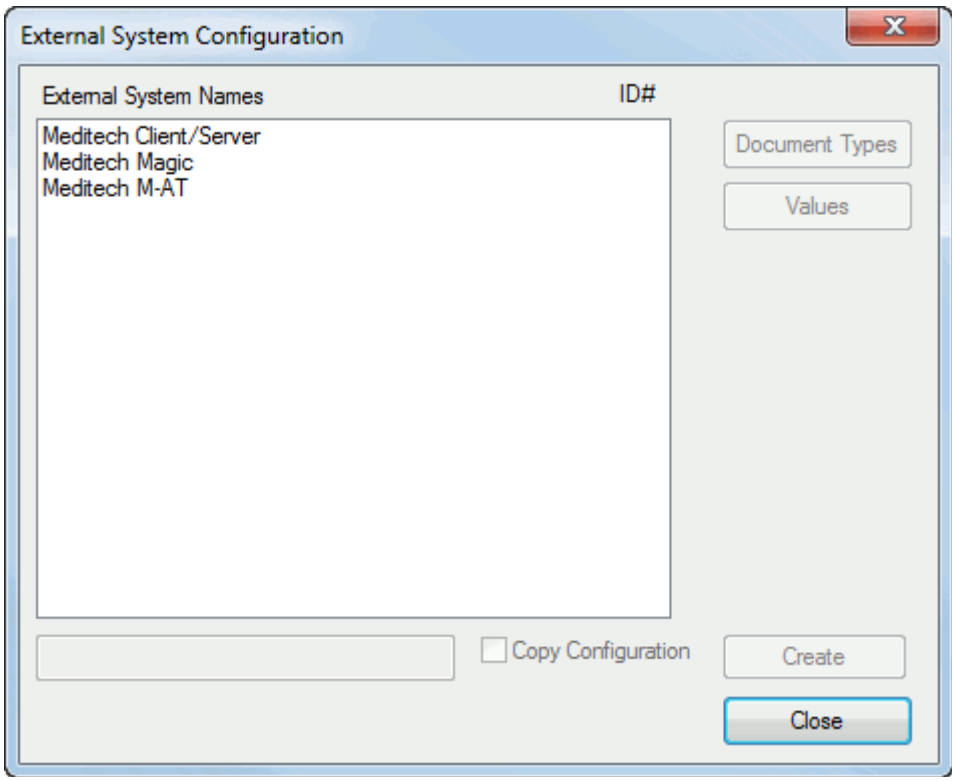
Configuring the IP Address and Port for Scripting

When using scripting in Meditech 6.0, you must configure the appropriate IP address and port for the Report Capture Scripting Tray so that the Report Capture Polling Service can send the relevant batch information needed to script reports.

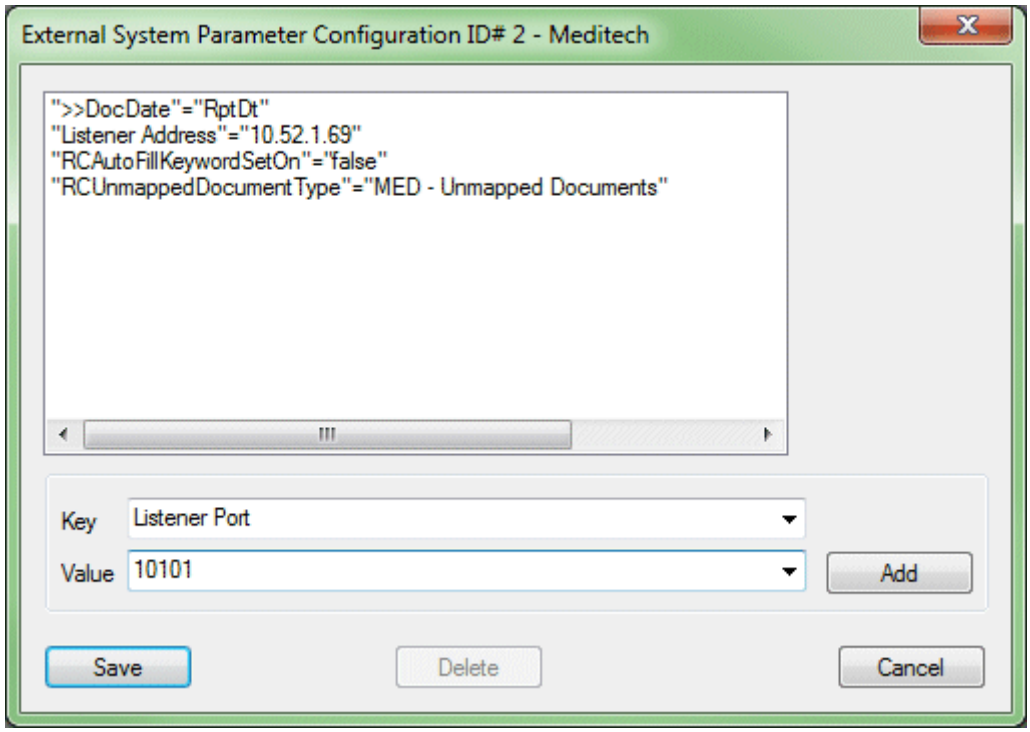
For more information on using scripting in Meditech 6.0, see Scripting Configuration on page 176.

To configure the IP address and port for scripting, follow these steps:

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



2. Select the **Meditech Magic** external system entry, then click **Values**. The **External System Parameter Configuration <External System ID> - <External System Name>** dialog box is displayed.



3. In the **Key** field, type **Listener Address**.
4. In the **Value** field, type the IP address of the host machine on which the Scripting Tray is running.
5. Click **Add**.
6. In the **Key** field, type **Listener Port**.
7. In the **Value** field, type the port on which the Scripting Tray will receive requests from the Polling Service.
8. Click **Add**.
9. Click **Save** to return to the **External System Configuration** dialog.
10. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 3 to 9.

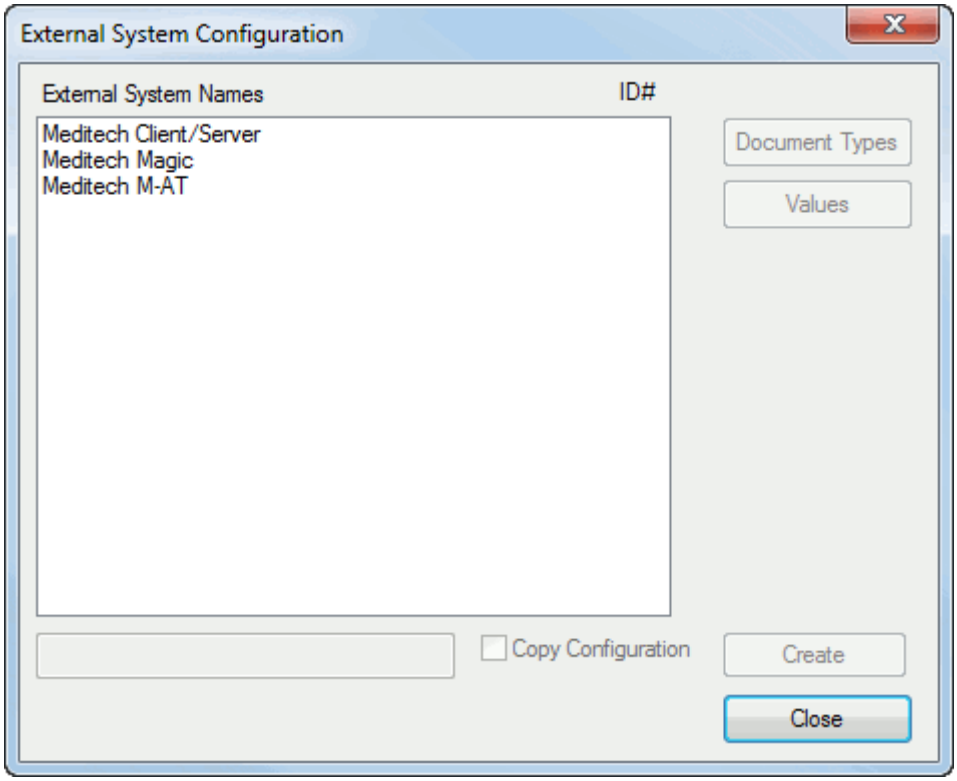
    By default, the **Meditech Client/Server** and **Meditech M-AT** options inherit the settings of the **Meditech Magic** option. If no configuration changes are made to the two override options, they retain the inherited settings. If configuration changes are made, however, they override the inherited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

Mapping Reports to Document Types

Each configured Document Type must be mapped to its corresponding Meditech report. Typically, this is performed during the configuration of your OnBase for Meditech solution. When mapping Document Types to the Meditech report types listed below, you must create and use the appropriate Meditech mnemonics as the External Document Types.

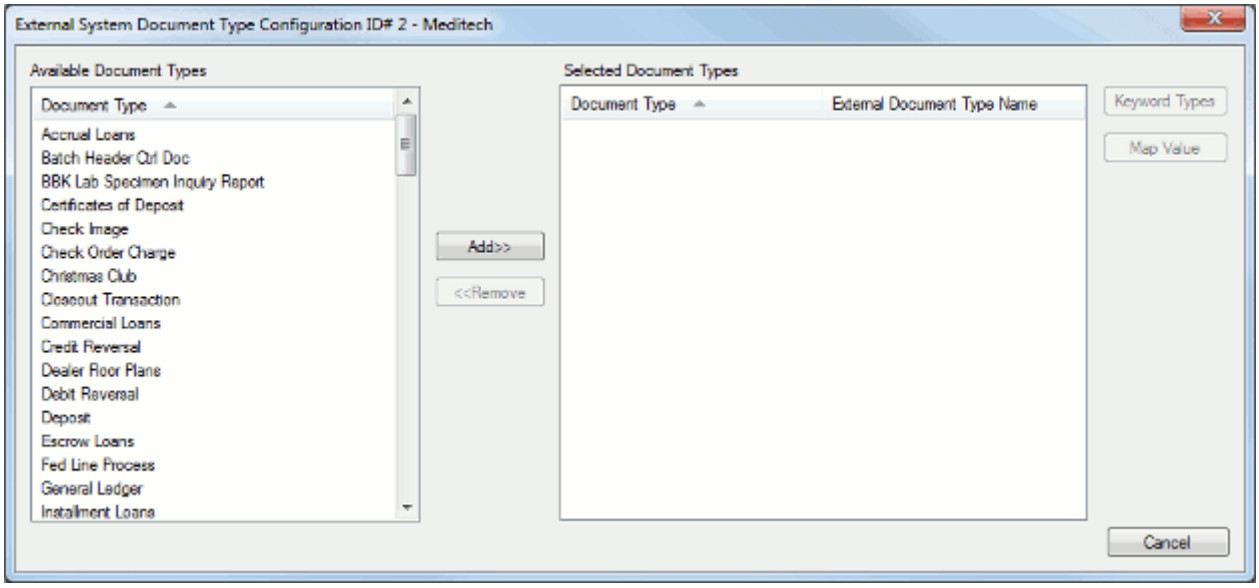
To map reports to Document Types:

1. Navigate to **Utils | External Systems**. The **External System Configuration** dialog box is displayed.

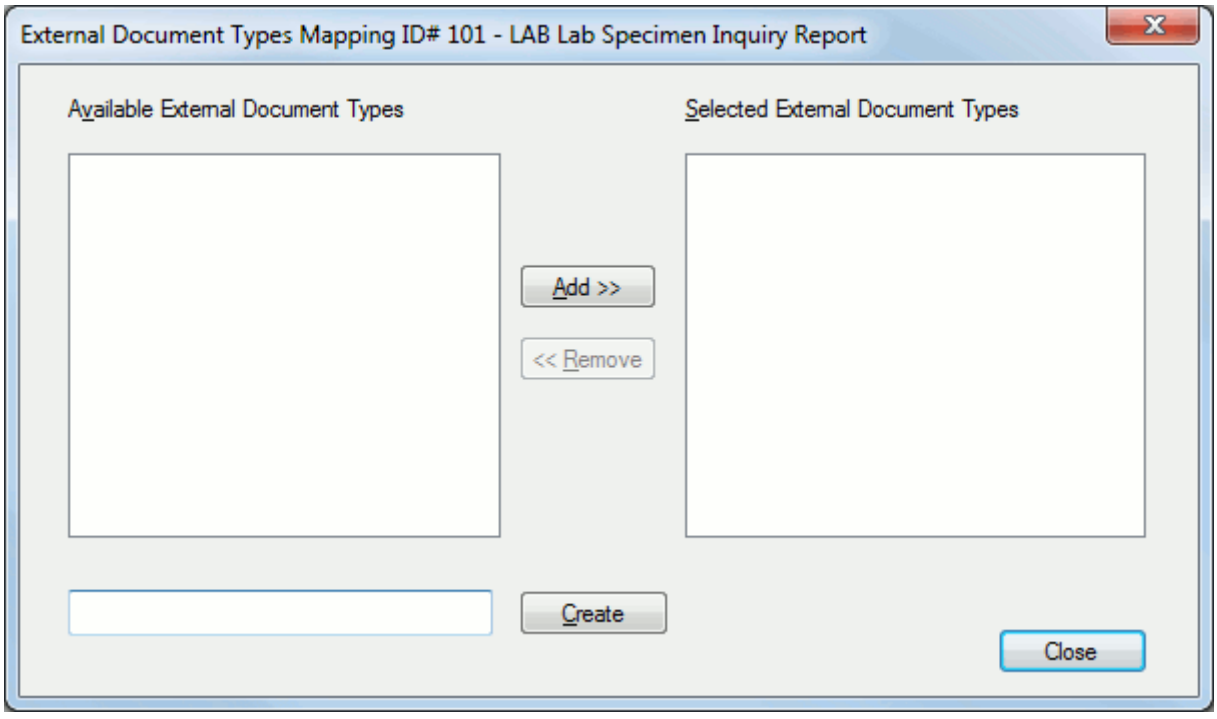


2. Select a Meditech system from the **External System Names** list, then click **Document Types**.

3. The **External System Document Type Configuration** dialog box is displayed.



4. Select the configured OnBase Document Type for the report type in the **Available Document Types** list, then click **Add**.
   The Document Type is added to the **Selected Document Types** list.
5. Select a Document Type from the **Selected Document Types** list, then click **Map Value**.
   The **External Document Types Mapping** dialog box is displayed.



6. Enter the Meditech mnemonic for the report type in the field next to the **Create** button.

   Different report types require different formatting. Use one of the following formats for the Meditech mnemonic:

   - For Laboratory reports, the Meditech mnemonic must use the following format: **L|[module]** where [module] is either LAB, PATH, BBK, or MIC. Use the following table as a guide:

Meditech Report Type (configure an appropriate OnBase Document Type)	Meditech Mnemonic (set as External Document Type)
LAB Lab Specimen Inquiry Report	**L|LAB**
BBK Lab Specimen Inquiry Report	**L|BBK**
MIC Lab Specimen Inquiry Report	**L|MIC**
PATH Lab Specimen Inquiry Report	**L|PATH**

   - For ITS reports, the Meditech mnemonic must use the following format: **I|[dept]|[rpt.mnemonic]** where [dept] is the ITS department name and [rpt.mnemonic] is the report's mnemonic. Use the following example as a guide:

Meditech Report Type (configure an appropriate OnBase Document Type)	Meditech Mnemonic (set as External Document Type)
Care Management Activity Note	**I|CM|ANOTE**

   - For Custom reports, the Meditech mnemonic must use the following format: **Z|[prog.name]** where [prog.name] is the name of the custom Meditech program used to print the report. Use the following example as a guide:

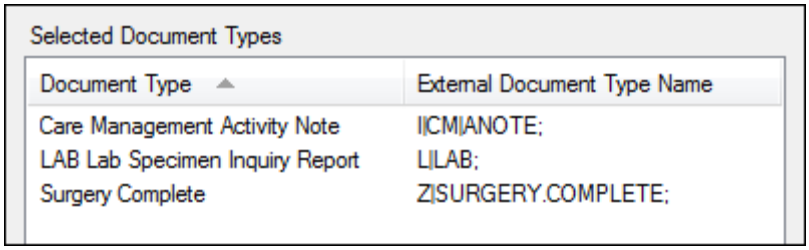
Meditech Report Type (configure an appropriate OnBase Document Type)	Meditech Mnemonic (set as External Document Type)
Surgery Complete	**Z|SURGERY.COMPLETE**

   - For reports from Meditech's Scanning and Archiving solution, the Meditech mnemonic must use the following format: **S|[reportname]** where [reportname] is the name of the report type. Use the following example as a guide:

Meditech Report Type (configure an appropriate OnBase Document Type)	Meditech Mnemonic (set as External Document Type)
Discharge Summary	**S|DISCHARGESUMMARY**

7. Click **Create**.

8. Click **Close**. The configured report type is displayed in the **Selected Document Types** list of the **External System Document Type Configuration** dialog box.



Mapping Keyword Types to Meditech Values

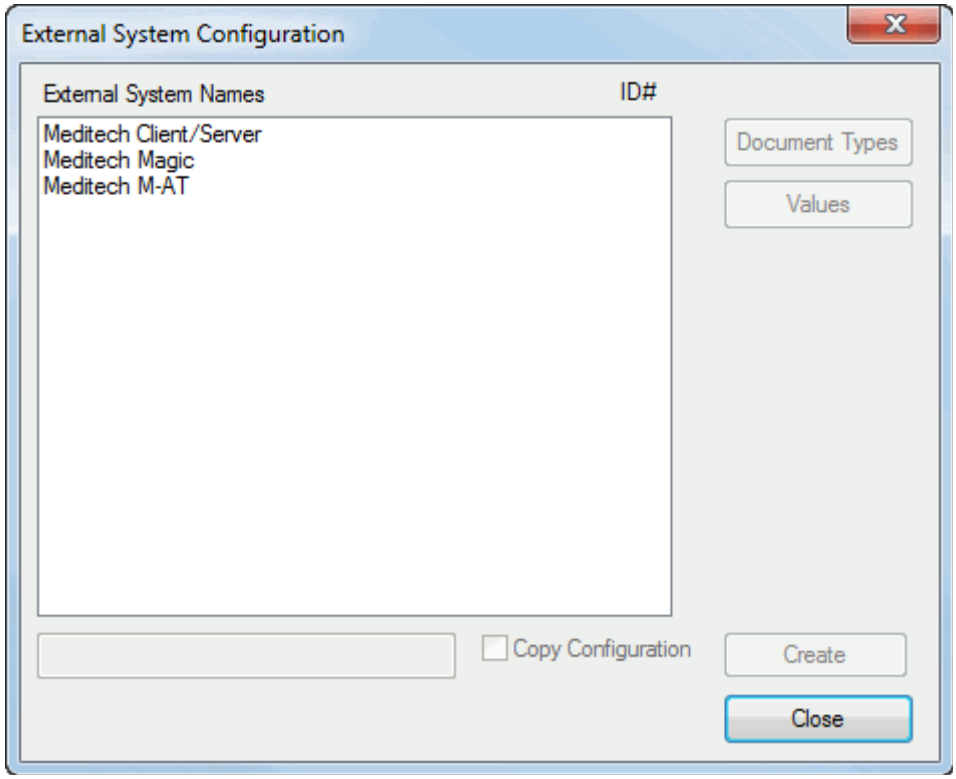
Required Meditech Keyword Types must be assigned to each Document Type configured for use with your Report Capture solution, and mapped to the appropriate Meditech value. The procedure below must be followed for each of the following required Keyword Types:

- **Account Number**
- **Medical Record Number**
- **Report URN**
- **Report Mnemonic**

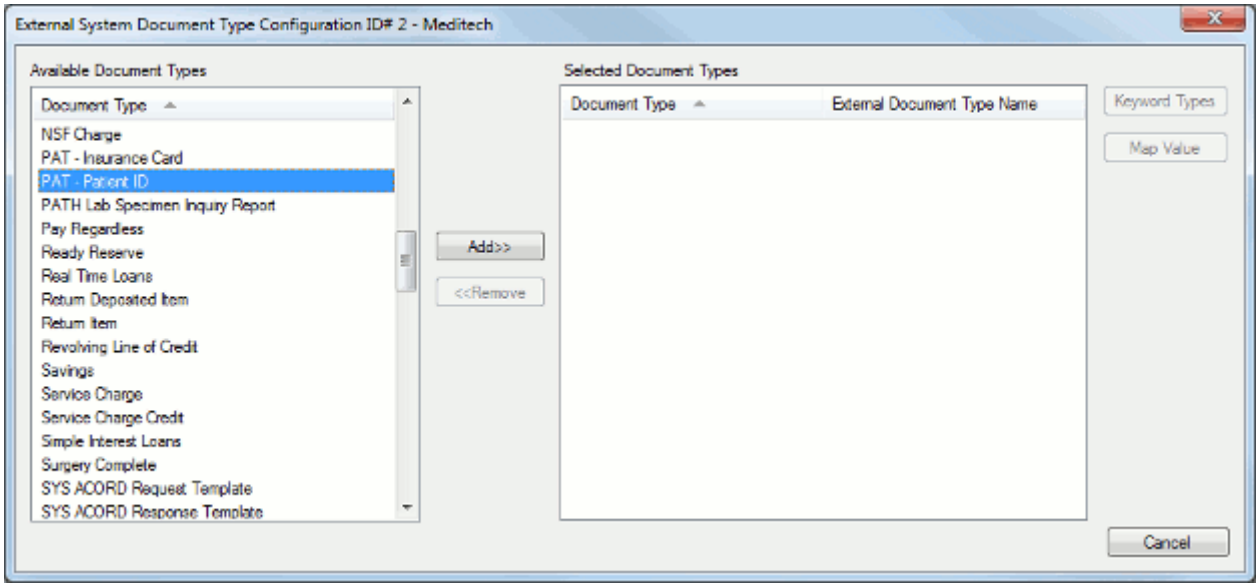
For more information on these required Keyword Types, see Configuring Required Keyword Types on page 154.

To map a required Keyword Type to the correct Meditech value, follow these steps:

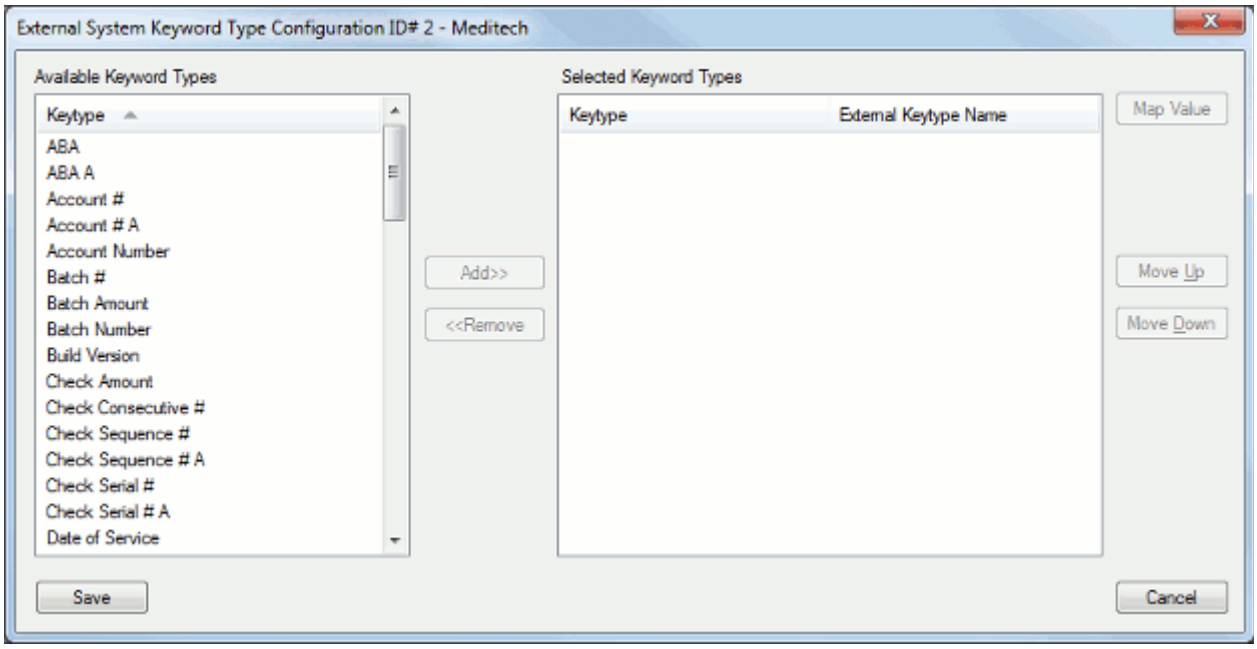
1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog is displayed.



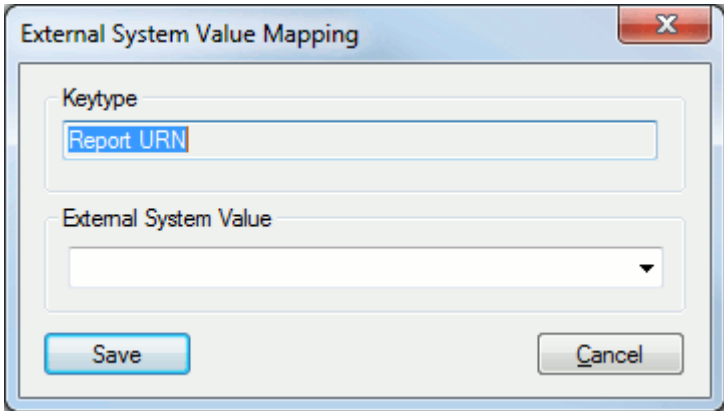
2. Select **Meditech Magic** and click **Document Types**. The **External System Document Type Configuration ID# 2 - Meditech Magic** dialog is displayed.



3. Select a Document Type from the **Selected Document Types** list, then click **Keyword Types**. The **External System Keyword Type Configuration ID# 2 - Meditech Magic** dialog box is displayed.



4. Select the required Keyword Type (i.e., **Account Number**, **Medical Record Number**, **Meditech Retrieval ID**, **Report URN**, or **Report Mnemonic**) from the **Available Keyword Types** list, then click **Add>>** to move it to the **Selected Keyword Types** list.
5. Select the required Keyword Type (i.e., the Keyword Type you selected in the previous step) from the **Selected Document Types** list, then click **Map Value**. The **External System Value Mapping** dialog box is displayed.



6. Type the appropriate value into the **External System Value** field, then click **Save**.
   - For a **Keytype** of **Account Number**, type **AccountNumber**.
   - For a **Keytype** of **Medical Record Number**, type **UnitNumber**.
   - For a **Keytype** of **Report URN**, type **RptUrn**.
   - For a **Keytype** of **Report Mnemonic**, type **RptMnemonic**.

7. Click **Save** to return to the **External System Configuration** dialog.
8. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT,** as appropriate, and click **Document Types**. Then repeat steps 3 to 7.

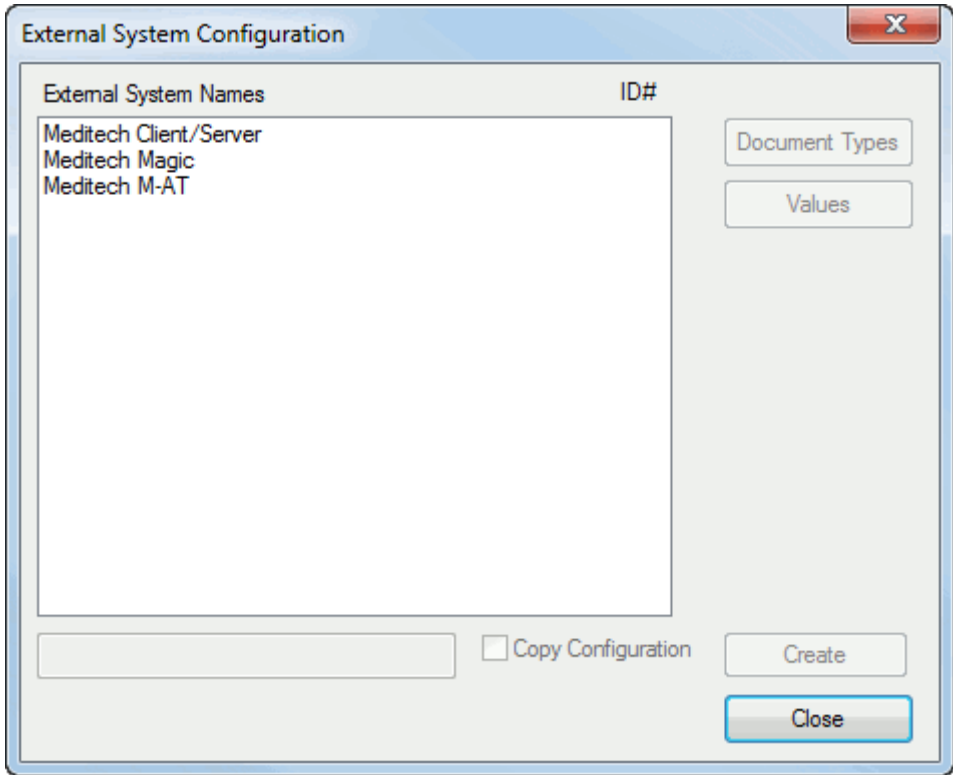
Note: While the **Meditech Client/Server** and **Meditech M-AT** options inherit the **Key**-**Value** pair settings of the **Meditech Magic** option by default, they do not inherit the Document Type mappings of the **Meditech Magic** option. You must manually map the Document Types for each override option you wish to use (as outlined in steps 3 to 7 above), even if you wish to maintain the same Document Type mappings you configured for the **Meditech Magic** option.

Configuring Multiple External System Parameters

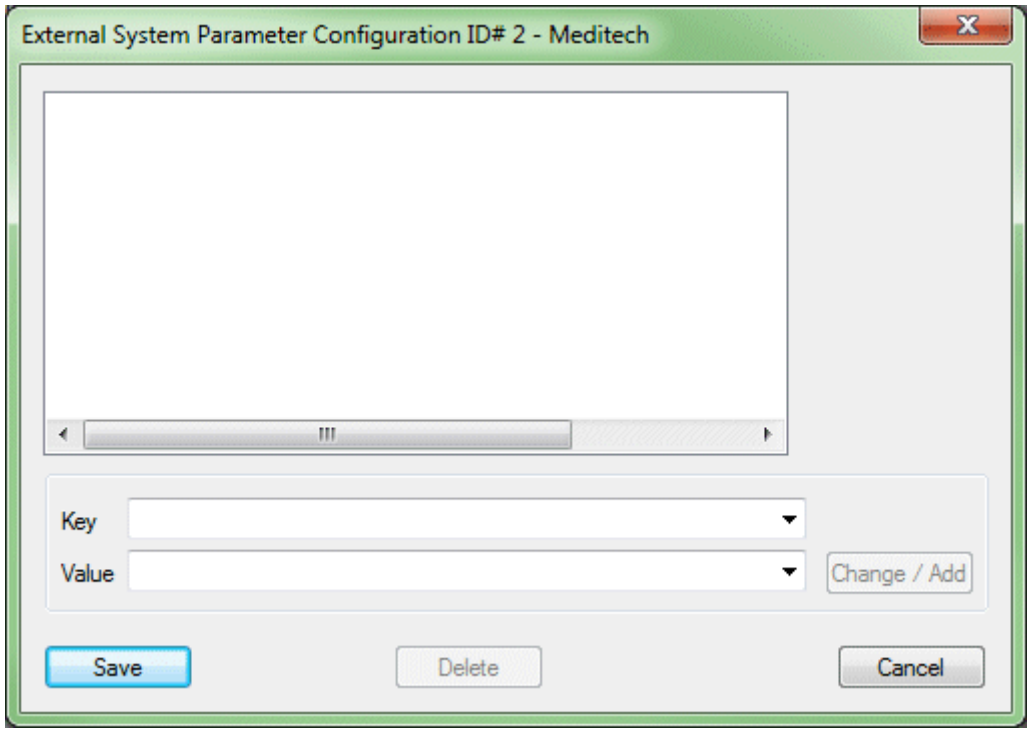
The sections above outline the procedures for configuring individual settings for your Report Capture for Meditech solution. Once you are familiar with these settings and how they impact your solution, you may wish to configure many or all of these settings at the same time.

To configure multiple settings at once, follow these steps:

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

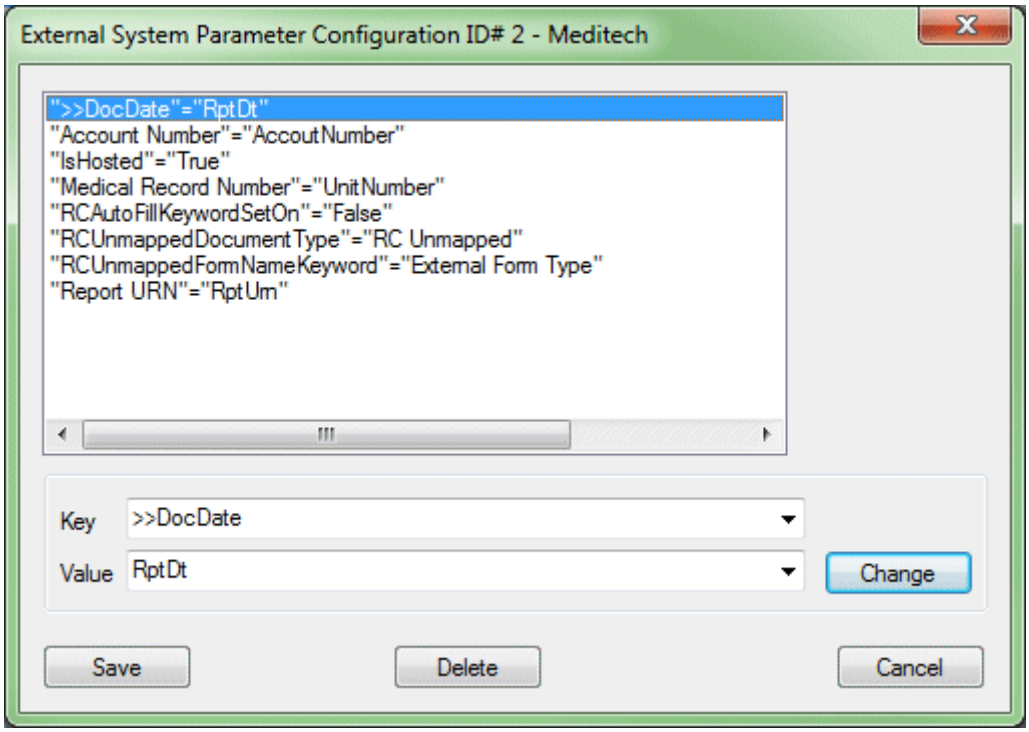


2. Select the **Meditech Magic** external system entry, then click **Values**. The **External System Parameter Configuration <External System ID> - <External System Name>** dialog box is displayed.



3. Type an appropriate OnBase-related value (e.g., an OnBase Document Type or Keyword Type) in the **Key** field.
4. Type the corresponding external system-related value (e.g., a Meditech Document Type or Keyword Type) in the **Value** field.
5. Click **Add**. The **Key**-**Value** pair is displayed in the top field of the dialog box.

6. Repeat steps 3 to 5 until you have added all desired **Key**-**Value** pairs.



7. Click **Save** to return to the **External System Configuration** dialog box.
8. If you have multiple Meditech systems and versions (e.g., Meditech Magic, Meditech Client/Server, Meditech MAT, etc.), and you would like to configure unique settings for each of these systems, select **Meditech Client/Server** or **Meditech M-AT**, as appropriate, and click **Values**. Then repeat steps 3 to 7.

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

Configuring User Privileges

To grant a user group permission to access the **Report Capture Administration** window in the Unity Client, follow these steps:

1. Open the OnBase Configuration module.
2. Select **Users** | **User Groups / Rights**.
3. Click **Product Rights**.
4. Select the **Report Capture** option in the **Administrative Privileges** section.
5. Click **Save**.

Configuring File Encryption

By default, your Report Capture solution is configured to encrypt and decrypt files during the printing process for additional file security. Printed files are encrypted when they leave Meditech and enter the temporary storage directory, and are decrypted once they are imported into OnBase.

If you want to disable file encryption, follow these steps:

1. Open the **Hyland.Applications.ReportCapture.RCImporterSvc.exe.config** file using a text editor such as Notepad.
2. Set the value of the **EnableEncryption** setting to **false**.
3. Save and close the **Hyland.Applications.ReportCapture.RCImporterSvc.exe.config** file.

Note: In order for your changes to take effect, you must restart the Report Capture Importer service.

Accessing the Report Capture Files

To access the Report Capture files generated during the printing process, you must locate the temporary storage directory for these files. By default, the files are deposited in the **backup** and **primary** folders in one of the following locations:

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

In addition to the printed Meditech reports, metadata files can also be found in these temporary storage folders. The different types of files can be easily identified by the following extensions:

- **.pcl:** Printed content file
- .**rcbh:** Report Capture batch header (metadata file)
- **.rcbt:** Report Capture batch trailer (metadata file)
- **.rcrh:** Report Capture request header (metadata file)
- **.rcrt:** Report Capture request trailer (metadata file)

Scripting Configuration

When using Report Capture for Meditech 6.0, certain actions may need to be completed through scripting (e.g., supplying a document and its metadata for import into OnBase). While these scripting needs may vary according to your specific solution, they must be defined in the **ReportDefs.xml** and **ScreenDefs.xml** configuration files. To begin setting up your scripting activities, create the two configuration files with these names and store them in the location where Report Capture was installed. For example:

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

For more information on these configuration files, see the appropriate sections below:

- The ReportDefs Configuration File on page 177
- The ScreenDefs Configuration File on page 190

The ReportDefs Configuration File

The **ReportDefs.xml** configuration file contains the scripting actions and functions that will be used to generate reports and print them into your OnBase system. This file must be manually created and edited by an administrator.

The elements and settings of the ReportDefs configuration file are outlined in the sections below. To view a sample ReportDefs configuration file, see Sample ReportDefs Configuration File on page 137.

Elements of the ReportDefs Configuration File

A ReportDefs configuration file is composed of some or all of the following elements. Not every element is required for each Report Capture solution. Some of these elements have corresponding sub-elements or attributes, not all of which are required for each Report Capture solution.

ReportDefs Configuration File Element	Description
The RCReportDefs Parent Element	The **RCReportDefs** parent element indicates the beginning and end of the ReportDefs configuration file.
The RCReportDef Parent Element	The **RCReportDef** parent element contains the name of the type of report for which the defined scripting actions will run. Multiple **RCReportDef** elements may reside within the **RCReportDefs** parent element. See The RCReportDef Parent Element on page 179 for more information.
The Action Parent Element	The **Action** parent element contains information about the type of action that will be run for the report type, as well as the order in which this action type will be run with respect to the other action types. Multiple **Action** elements may reside within each **RCReportDef** parent element. See The Action Parent Element on page 180 for more information.

ReportDefs Configuration File Element	Description
The <Action Name> Element (Common Settings)	While the various action elements contain settings unique to the type of action being performed, some common settings can be applied to any of these action elements to perform the same function. For more information on the settings unique to the individual action element, see the appropriate action element's section below. For more information on the common settings, see The <Action Name> Element (Common Settings) on page 181.
The Evidence Elements	Evidence consists of conditions that are met before an action has been completed. The **PositiveEvidence** element is used to indicate the successful completion of an attempted action, while the **NegativeEvidence** element is used to indicate the failed execution of an attempted action. These evidence elements and other evidence-related settings may be applied to any of the action elements (e.g., the **SendFunctionKeyData** element) contained within the ReportDefs configuration file. See The Evidence Elements on page 182 for more information.
The ValueKey Element	The **ValueKey** element, which can be applied to any action element, is used to specify the values and the sequence in which they will appear in the string of text sent by the action element. Multiple **ValueKey** elements may reside within each action element. See The ValueKey Element on page 183 for more information.
The StartApplicationData Element	The **StartApplicationData** element is used to define an application or service to be launched when the Scripting Tray is started. See The StartApplicationData Element on page 184 for more information.
The EndApplicationData Element	The **EndApplicationData** element is used to define an application or service to be stopped and closed when the Scripting Tray has finished processing a script. See The EndApplicationData Element on page 184 for more information.
The FindWindowData Element	The **FindWindowData** element is used to locate a window with a specified title and bring it to the foreground. See The FindWindowData Element on page 185 for more information.

ReportDefs Configuration File Element	Description
The SendFunctionKeyData Element	The **SendFunctionKeyData** element is used to send a function key to the current window. See The SendFunctionKeyData Element on page 185 for more information.
The SendInputData Element	The **SendInputData** element is used to send a specified string of text to the screen. See The SendInputData Element on page 186 for more information.
The SendFormatData Element	The **SendFormatData** element is used to send a formatted string of text to the screen using the values specified in the child **ValueKey** elements. Multiple **ValueKey** elements may reside within each **SendFormatData** element. See The SendFormatData Element on page 187 for more information.
The WaitData Element	The **WaitData** element is used to pause the Scripting Tray for a specified period of time before continuing to process the script. See The WaitData Element on page 188 for more information.
The WaitForScreenData Element	The **WaitForScreenData** element is used to pause the Scripting Tray until a screen with a specified title is detected before resuming processing on the script. See The WaitForScreenData Element on page 188 for more information.
The ClickButtonData Element	The **ClickButtonData** element is used to send a mouse click to a specified button in a specified area of the screen. See The ClickButtonData Element on page 189 for more information.
The WaitForWindowCloseData Element	The **WaitForWindowCloseData** element is used to pause the Scripting Tray until a screen with a specified title is closed before resuming processing on the script. See The WaitForWindowCloseData Element on page 189 for more information.

The RCReportDef Parent Element

The **RCReportDef** parent element contains the name of the type of report for which the sequence of scripting actions defined within the sub-elements will run. Multiple **RCReportDef** elements can be created, allowing for different sequences of scripting actions to be run for different types of reports.

```
<RCReportDef name="OLD_FMP_PRINTING">
```

In addition to values that name report types used to print reports into your OnBase system, as in the example above, the following values may also be used for the **name** setting:

- **Startup:** indicates a report type that defines the applications and services that must be launched when the Scripting Tray is started, to ensure successful processing of the script.
- **Cleanup:** indicates a report type that defines the applications and services that must be stopped and closed when the Scripting Tray has finished processing the script.

The Action Parent Element

The **Action** parent element contains information about the type of action that will be run for the report type, as well as the order in which this action type will be run with respect to the other action types. Multiple **Action** elements may reside within each **RCReportDef** parent element; together, these **Action** elements compose the sequence of scripting work that will be performed on the specified report type.

```
<Action order="10" actionType="FindWindow">
```

The following settings are found in the **Action** parent element:

Action Parent Element Settings	Description
order	This setting controls the order in which the specific action will be run with respect to the other actions defined in the ReportDefs configuration file. • The order in which the **Action** parent elements are listed in the ReportDefs configuration file does not affect the actual order in which these actions are executed. For example, even if an **Action** element with an **order** value of **20** is listed before an **Action** element with an **order** value of **10**, the latter action will be executed first. • Gaps between the **order** values specified for different actions are permissible (e.g., **10**, **20**, **35**, **67**, etc.). • If the same **order** value is used for more than one action, these actions are executed in a random order with respect to each other. For example, in a sequence of actions containing **order** values of **1**, **2**, **2**, and **4**, either of the actions configured to have an order of **2** may be executed third in the sequence. **Tip:** Although permissible, setting the same **order** value for more than one action is not recommended, as it gives you less control over scripting behavior.

Action Parent Element Settings	Description
actionType	This setting controls which type of action will be performed. Each **actionType** value has its own associated **Data** child element that must be defined if the action is to be performed (e.g., an **actionType** with a value of **SendFunctionKey** must have the **SendFunctionKeyData** child element defined). For more information on the various **Data** child elements and the types of actions they encompass, see the sections below. The **actionType** setting may be set to any of the following values: • **StartApplication** • **EndApplication** • **FindWindow** • **SendFunctionKey** • **SendInput** • **SendFormat** • **Wait** • **WaitForScreen** • **ClickButton** • **WaitForWindowClose**

The <Action Name> Element (Common Settings)

While the various action elements contain settings unique to the type of action being performed, some common settings can be applied to any of these action elements to perform the same function.

```
<SendInputData stringToSend="PCS Archive Report" hitEnter="1" milli-
secondsToWait="250" errorString="PCS Archive Report not found for
account." errorScope="Ignore"/>
```

The following settings can be found in any of the action elements:

The <Action Name> Element (Common) Settings	Description
millisecondsToWait	This setting controls the number of milliseconds the Scripting Tray will wait before executing the next action on the script.
errorString	This setting controls the message that will be displayed if executing the specified action results in an error.

The <Action Name> Element (Common) Settings	Description
errorScope	This setting controls the scope of any errors that result from executing the specified action. The **errorScope** setting may be set to any of the following values: • **Service:** the scripting engine will stop processing requests, and the Scripting Tray icon in the taskbar will be marked with a red error symbol:  A tool tip and descriptive error message will also be displayed to help identify the issue. No further requests will be processed until the error is corrected and the Scripting Tray application is restarted. To restart the Scripting Tray, click on its icon in the taskbar and select **Restart Scripting**. • **Batch:** the current request will be marked with an error, and the Scripting Tray will begin processing the next request. • **Account:** the current account in the request will be marked with an error, and the Scripting Tray will begin processing the next account. • **Report:** the report will not be processed for the account. • **Ignore:** the Scripting Tray will ignore the error and continue processing as normal.

For more information on the settings unique to the individual action element, see the appropriate action element's section below.

The Evidence Elements

Evidence consists of conditions that are met before an action has been completed. The **PositiveEvidence** element is used to indicate the successful completion of an attempted action, while the **NegativeEvidence** element is used to indicate the failed execution of an attempted action. These evidence elements and other evidence-related settings may be applied to any of the action elements (e.g., the **SendFunctionKeyData** element) contained within the ReportDefs configuration file.

```
<SendFunctionKeyData keyToSend="F11" timesToSend="1" error-
String="Account {0} not found." errorScope="Account" evidenceTime-
outMS="5000">
<ValueKey sequence="0" name="acct"/>
<PositiveEvidence evidence="Account Number matches" />
<NegativeEvidence evidence="No matches found" hitMessage="Account not found." />
</SendFunctionKeyData>
```

The following settings are found in the **PositiveEvidence** element:

PositiveEvidence Element Settings	Description
evidence	This setting controls the string of text that indicates that the attempted action has been successfully completed.

The following settings are found in the **NegativeEvidence** element:

NegativeEvidence Element Settings	Description
evidence	This setting controls the string of text that indicates that the attempted action has failed.
hitMessage	This setting controls the error message that will be displayed on the screen when the attempted action has failed.

The following setting is found in the Action element (e.g., the **SendFunctionKeyData** element) to which the **PositiveEvidence** and **NegativeEvidence** elements have been applied:

<Action Name> Element Settings	Description
evidenceTimeoutMS	This setting controls the maximum length of time (in milliseconds) the Scripting Tray will wait for any evidence condition to be met. If no evidence conditions are met within the allotted time, the Scripting Tray disregards any evidence considerations when performing the action on the script. In order for evidence conditions to be considered for the action, the **evidenceTimeoutMS** setting must be present and set to a value of **1** or greater.

The ValueKey Element

The **ValueKey** element, which can be applied to any action element, is used to specify the values and the sequence in which they will appear in the string of text sent by the action element. Multiple **ValueKey** elements may reside within each action element.

```
<SendFunctionKeyData keyToSend="F11" timesToSend="1" error-
String="Account {0} not found." errorScope="Account" evidenceTime-
outMS="5000">
```

<ValueKey sequence="0" name="acct"/>

<ValueKey sequence="1" name="report"/>

```
<PositiveEvidence evidence="Account Number matches" />
```

```
<NegativeEvidence evidence="No matches found" hitMessage="Account not found." />
</SendFunctionKeyData>
```

The following settings are found in the **ValueKey** element:

ValueKey Element Settings	Description
sequence	This setting controls the order in which the specified segment of the text string will appear in the string with respect to the other segments (as defined by additional instances of the **ValueKey** element within the action element). Unlike the values of the **Action** parent elements' **order** settings, the values of the **sequence** settings within a single action element (e.g., **SendFunctionKeyData**) must start at **0** and be sequential, consecutive, and non-repeating. For example, **(0, 1, 2, 3)** is an acceptable series of values for the sequence settings, while **(5, 10, 10, 34)** is not.
name	This setting controls the text that will appear in the specified segment of the text string.

The StartApplicationData Element

The **StartApplicationData** element is used to define an application or service to be launched when the Scripting Tray is started.

```
<StartApplicationData processName="HookSrv" fileName="HookSrv.exe" workingDirectory="C:\Hooks" millisecondsToWait="15000" error-String="Unable to start Hook Engine" errorScope="Service" />
```

The following settings are found in the **StartApplicationData** element:

StartApplicationData Element Settings	Description
processName	This setting controls the name of the application or service that will be automatically launched when the Scripting Tray is started.
fileName	This setting controls the filename of the specified application or service.
workingDirectory	This setting controls the directory from which the specified application or service will be launched.

The EndApplicationData Element

The **EndApplicationData** element is used to define an application or service to be stopped and closed when the Scripting Tray has finished processing a script.

```
<EndApplicationData processName="HookSrv" millisecondsToWait="10000"
errorString="Unable to stop Hook Engine" errorScope="Service" />
```

The following setting is found in the **EndApplicationData** element:

EndApplicationData Element Settings	Description
processName	This setting controls the name of the application or service that will be automatically stopped and closed when the Scripting Tray has finished processing a script.

The FindWindowData Element

The **FindWindowData** element is used to locate a window with a specified title and bring it to the foreground.

```
<FindWindowData windowName="ABC Test M-AT HCIS" errorString="Meditech
is not running." errorScope="Service" />
```

The following setting is found in the **FindWindowData** element:

FindWindowData Element Settings	Description
windowName	This setting controls the name of the window that the Scripting Tray searches for.

The SendFunctionKeyData Element

The **SendFunctionKeyData** element is used to send a function key to the current window.

```
<SendFunctionKeyData keyToSend="F4" timesToSend="1" modifier="Alt"
millisecondsToWait="0" />
```

The following settings are found in the **SendFunctionKeyData** element:

SendFunctionKeyData Element Settings	Description
keyToSend	This setting controls the function key that will be sent to the current window. The **keyToSend** setting may be set to any of the following values: • **ESC** • **RIGHT** • **LEFT** • **UP** • **DOWN** • **ENTER** • **F1** • **F2** • **F3** • **F4** • **F5** • **F6** • **F7** • **F8** • **F9** • **F10** • **F11** • **F12**
timesToSend	This setting controls the number of times the specified function key will be sent to the current window.
modifier	This setting controls which key must be held down while sending the function key to the current window. The **modifier** setting may be set to any of the following values: • **Unset:** if modifier is set to **Unset**, or if no value is present, then no modifier key must be held down while sending the function key to the current window. • **Control** • **Alt** • **Shift**

The SendInputData Element

The **SendInputData** element is used to send a specified string of text to the screen.

```
<SendInputData stringToSend="PCS Archive Report" hitEnter="1" milli-
secondsToWait="250" errorString="PCS Archive Report not found for
account." errorScope="Ignore"/>
```

The following settings are found in the **SendInputData** element:

SendInputData Element Settings	Description
stringToSend	This setting controls the string of text that will be sent to the screen when the **SendInputData** action is executed.
hitEnter	This setting controls the number of times the **Enter** key will be pressed after the specified string of text is sent to the screen. The **hitEnter** setting may be set to any positive integer value. If no value is present, the setting defaults to **0**.

The SendFormatData Element

The **SendFormatData** element is used to send a formatted string of text to the screen using the values specified in the child **ValueKey** elements. Multiple **ValueKey** elements may reside within each **SendFormatData** element (see The ValueKey Element on page 183 for more information).

```
<SendFormatData stringToSend="Account {0} is ready for processing."
valuesCount="1" hitEnter="0" millisecondsToWait="0" error-
String="Account {0} not found." errorScope="Account">
```

The following settings are found in the **SendFormatData** element:

SendFormatData Element Settings	Description
stringToSend	This setting controls the string of text that will be sent to the screen when the **SendFormatData** action is executed. The **stringToSend** setting may be set to a value consisting of a combination of plain text and string format placeholders. A placeholder must contain a positive integer that matches the value of the **sequence** setting in one of the child **ValueKey** elements, enclosed by braces (e.g., **stringToSend="Account {0} is ready for processing."**).
valuesCount	This setting controls the number of **ValueKey** child elements that reside within the **SendFormatData** element. The **valuesCount** setting must be set to a positive integer value that matches the number of placeholders defined in the **stringToSend** element.

SendFormatData Element Settings	Description
hitEnter	This setting controls the number of times the **Enter** key will be pressed after the specified string of text is sent to the screen. The **hitEnter** setting may be set to any positive integer value. If no value is present, the setting defaults to **0**.
errorString	This setting controls the message that will be displayed if executing the **SendFormatData** action results in an error. When used with the **SendFormatData** element, the **errorString** setting may be set to a value consisting of a combination of plain text and string format placeholders. A placeholder must contain an integer that matches the value of the **sequence** setting in one of the child **ValueKey** elements, enclosed by braces (e.g., **errorString="Account {0} not found."**).

The WaitData Element

The **WaitData** element is used to pause the Scripting Tray for a specified period of time before continuing to process the script.

```
<WaitData millisecondsToWait="5" />
```

No settings are specific to the **WaitData** element. For information about common settings that can be applied to the **WaitData** element, see The <Action Name> Element (Common Settings) on page 181.

The WaitForScreenData Element

The **WaitForScreenData** element is used to pause the Scripting Tray until a screen with a specified title is detected before resuming processing on the script.

```
<WaitForScreenData screenName="ABC Test M-AT HCIS" attach="true"
errorString="Meditech is not running." errorScope="Ignore" />
```

The following settings are found in the **WaitForScreenData** element:

WaitForScreenData Element Settings	Description
screenName	This setting controls the name of the screen (i.e., the name displayed in the screen's title bar) that the Scripting Tray must detect before resuming processing on the script.

WaitForScreenData Element Settings	Description
attach	This setting controls whether the Scripting Tray forces the specified screen, once detected, into foreground. • If **attach** is set to **true**, then the Scripting Tray forces the specified screen into the foreground. • If **attach** is set to **false**, or if no value is present, then the specified screen remains in the background (or wherever it initially appears).

The ClickButtonData Element

The **ClickButtonData** element is used to send a mouse click to a specified button in a specified area of the screen.

```
<ClickButtonData screenArea="MainMenu" buttonName="PATSELECT" milli-
secondsToWait="0" />
```

The following settings are found in the **ClickButtonData** element:

ClickButtonData Element Settings	Description
screenArea	This setting controls the area of the screen where the mouse click action will be performed. The **screenArea** setting must be set to a value that matches the value of a **Screen** element's **name** setting within the ScreenDefs configuration file. For more information, see The Screen Parent Element on page 191.
buttonName	This setting controls the name of the button that will be clicked in the specified **screenArea** when the mouse click action is performed. The **buttonName** setting must be set to a value that matches the value of a **Field** element's **name** setting within the ScreenDefs configuration file. For more information, see The Field Element on page 191.

The WaitForWindowCloseData Element

The **WaitForWindowCloseData** element is used to pause the Scripting Tray until a screen with a specified title is closed before resuming processing on the script.

```
<WaitForWindowCloseData screenName=" - HIM Dept:" millisecond-
sToWait="25" errorString="Printing Failed To Close" error-
Scope="Ignore"/>
```

The following setting is found in the **WaitForWindowCloseData** element:

WaitForWindowCloseData Element Settings	Description
screenName	This setting controls the name of the screen (i.e., the name displayed in the screen's title bar) that the Scripting Tray must detect as being closed before resuming processing on the script.

The ScreenDefs Configuration File

The **ScreenDefs.xml** configuration file contains the elements and settings that configure the specific areas of the screen in which the scripting actions and functions defined in the **ReportDefs.xml** configuration file will be performed. The ScreenDefs file must be manually created and edited by an administrator.

The elements and settings of the ScreenDefs configuration file are outlined in the sections below. To view a sample ScreenDefs configuration file, see Sample ReportDefs Configuration File on page 137.

Elements of the ScreenDefs Configuration File

A ScreenDefs configuration file is composed of the following elements. Currently, all elements and their corresponding settings are required for a Report Capture solution.

ScreenDefs Configuration File Element	Description
The Screens Parent Element	The **Screens** parent element indicates the beginning and end of the ScreenDefs configuration file.
The Screen Parent Element	The **Screen** parent element contains the internal name and external title of the screen in which the configured actions will be performed. Multiple **Screen** elements may reside within the **Screens** parent element. See The Screen Parent Element on page 191 for more information.
The Field Element	The **Field** element contains the internal name of the field affected by the action as well as the horizontal and vertical coordinates where the action will be performed. Multiple **Field** elements may reside within each **Screen** parent element. See The Field Element on page 191 for more information.

The Screen Parent Element

The **Screen** parent element contains the internal name and external title of the screen in which the configured actions will be performed. Multiple **Screen** elements may reside within the **Screens** parent element.

```
<Screen name="MainMenu" title="ABC Test M-AT">
```

The following settings are found in the **Screen** parent element:

Screen Parent Element Settings	Description
name	This setting controls the internal name that is used to reference the particular screen where the configured actions will be performed.
title	This setting controls the beginning of the text displayed in the title bar for the screen where the configured actions will be performed.

The Field Element

The **Field** element contains the internal name of the field affected by the action as well as the horizontal and vertical coordinates where the action will be performed. Multiple **Field** elements may reside within each **Screen** parent element.

```
<Field name="SCRID" xCoordinate="0" yCoordinate="0" />
```

The following settings are found in the **Field** element:

Field Element Settings	Description
name	This setting controls the internal name that is used to reference the field affected by the configured actions.
xCoordinate	This setting controls the horizontal coordinate of the screen where the configuration actions will be performed.
yCoordinate	This setting controls the vertical coordinate of the screen where the configuration actions will be performed.

OnBase®
Foundation EP5

Report Capture

User Guide

Foundation EP5

Usage

Depending on your solution, you can use Report Capture to send reports from your Meditech 6.0 system to your OnBase system in a few different ways.

If you are using Meditech Client/Server modules with your Meditech 6.0 system, and if you have the proper licensing and configuration, you can use the Release of Information module to retrieve documents from Meditech 6.0 through Report Capture, or you can use Workflow Life Cycles specific to your line-of-business processes to retrieve documents from Meditech 6.0 through Report Capture automatically. For more information, see the Medical Records Release of Information documentation and the Workflow documentation, respectively.

If you are using Meditech M-AT modules with your Meditech 6.0 system, you can run pre-configured scripts to print Meditech reports directly into OnBase from within your Meditech system. For more information on the scripts available for your solution, contact your system administrator.

Depending on your user privileges, you may also be able to view or cancel submitted Report Capture batches from the **Report Capture Administration** window in the Unity Client (see the sections below for more information).

Note: Blank or duplicate documents from your Meditech system are automatically filtered from Report Capture batches and thus are not printed into OnBase.

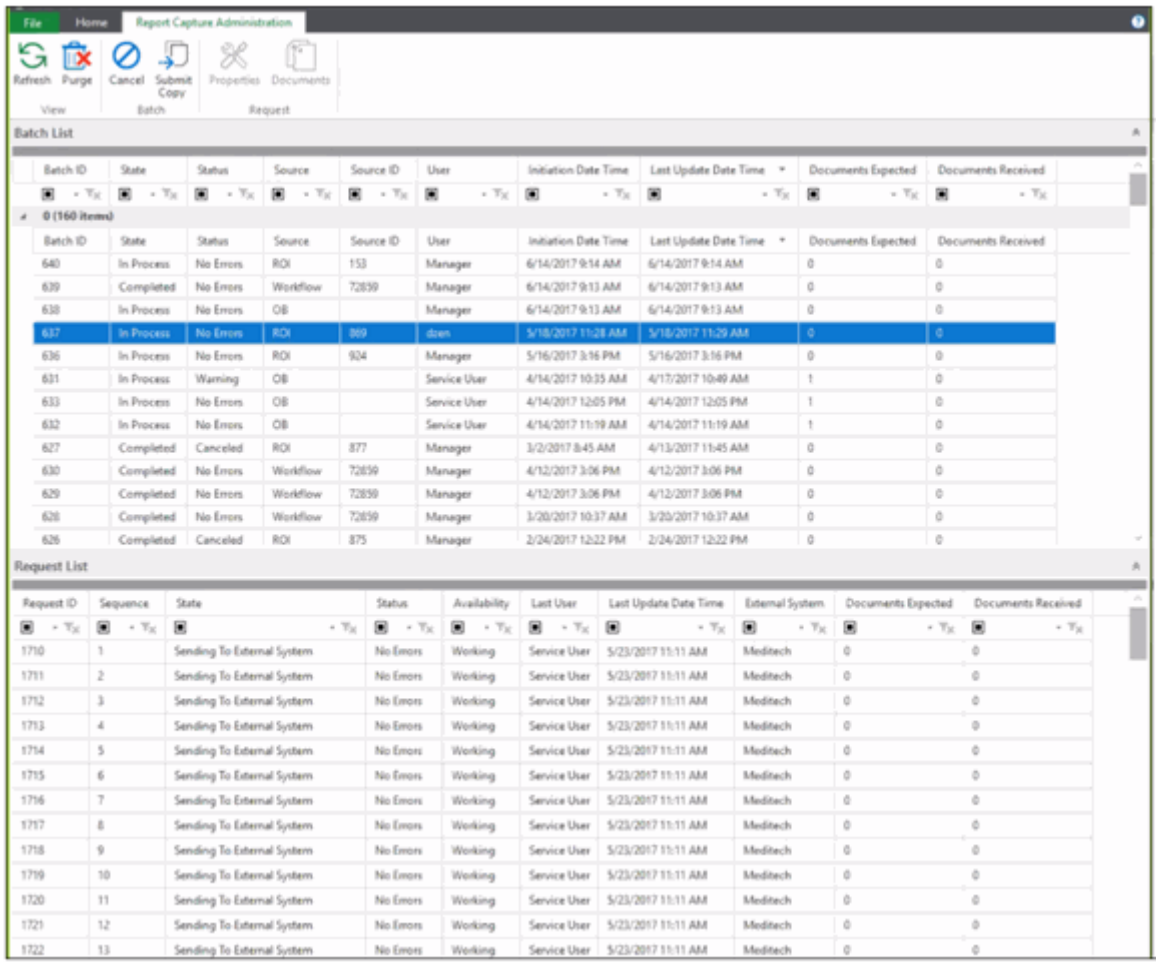
Viewing Report Capture Batch Information

If you have the appropriate user privileges, you may be able to view information on submitted Report Capture batches, from the **Report Capture Administration** window in the Unity Client or Medical Records Unity Client.

To open the Report Capture Administration window in the Unity Client, from the **File** menu, select **Administration | Report Capture Administration**.

To open the Report Capture Administration window in the Medical Records Unity Client, select **Report Capture** in the **Administration** group of the **Home** ribbon.

The **Report Capture Administration** dialog is displayed:



The top portion of this window displays the **Batch List**, where you can view a list of recently submitted Report Capture batches. Additional information is displayed in the columns of each batch's listing, including the batch's status, the source of the batch (e.g., Workflow, Meditech Magic, etc.), the total number of documents processed for all requests in the batch, etc.

Note: The **Batch List** displays only the 2,000 most recent batches.

To view a more comprehensive breakdown of a Report Capture batch, select the batch's listing in the **Batch List**. The lower portion of the window will populate the **Request List** with all requests made for the selected batch, with each request corresponding to a patient visit. The **Request List** provides you with request-specific information for the selected batch, including each requests status, processing sequence, external system, number of documents processed, etc.

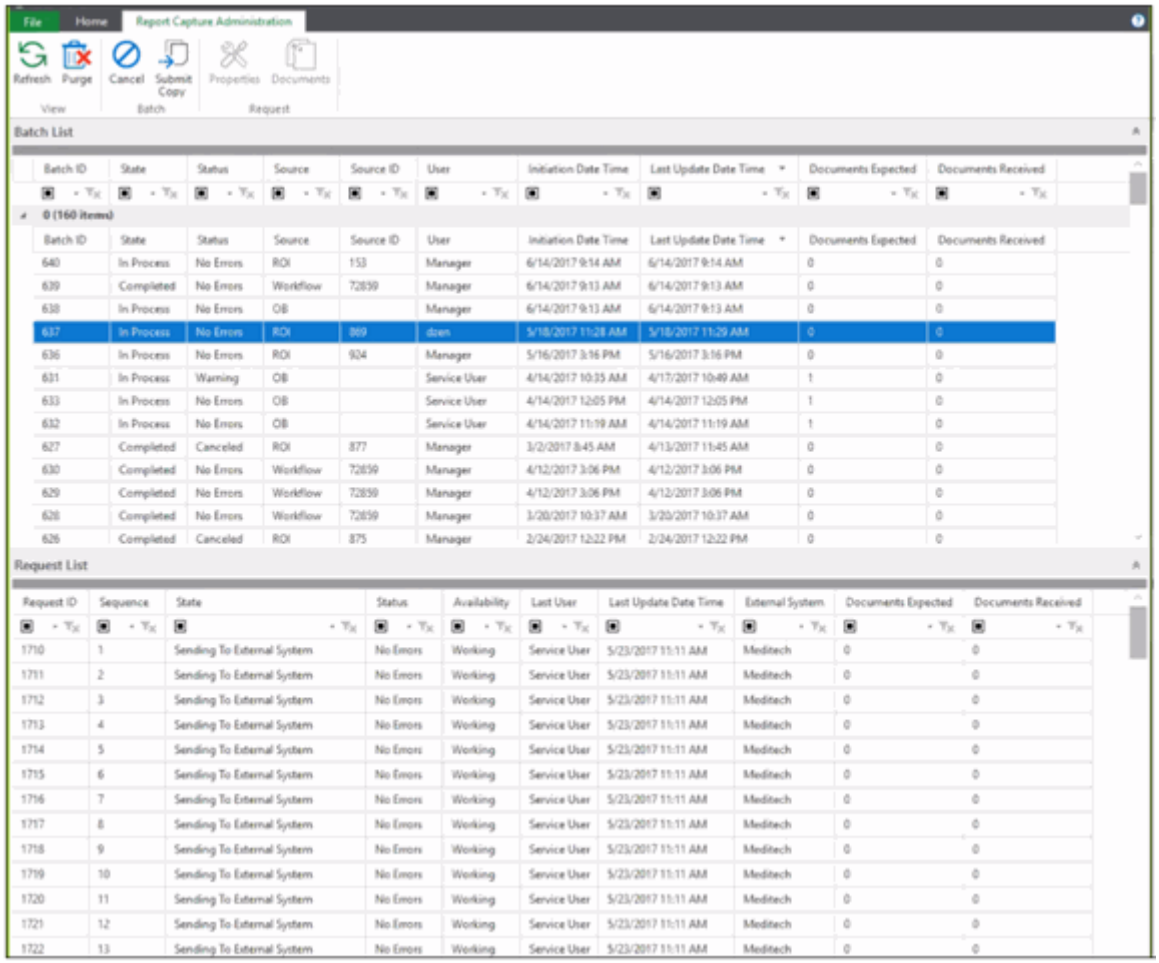
Note: If you are using a Meditech Magic system, each request corresponds to a unique patient visit. If you are using a Meditech 6.0 system, a single patient visit may correspond to separate requests made to the Meditech Client/Server and Meditech M-AT modules.

To update the **Batch List** and **Request List** in the **Report Capture Administration** window, click **Refresh** in the **Actions** ribbon group, or right-click an area in the **Batch List** and select **Refresh**.k

Canceling a Report Capture Batch

In some cases, you may need to cancel a Report Capture batch after it has been submitted. To cancel an in-process Report Capture batch, follow these steps:

1. Open the **Report Capture Administration** window.
2. In the **Batch List**, select the appropriate Report Capture batch.



3. In the **Batch** ribbon group, click **Cancel,** or right-click the selected batch and select **Cancel**. A notification is displayed indicating whether or not the batch was successfully canceled.

Note: The **Cancel** button is disabled if the selected batch has already been canceled, is in the process of being canceled, or is otherwise complete. Only in-process batches can be canceled.

Copying an Existing Report Capture Batch

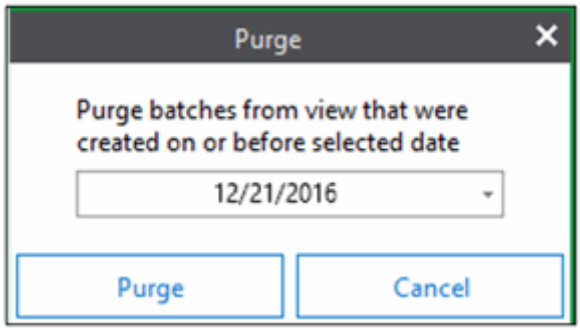
In some cases, you may want to submit a copy of an existing Report Capture batch. To submit a copy of an existing batch, follow these steps:

1. Open the **Report Capture Administration** window.
2. In the **Batch List**, select the batch you want to copy.
3. In the **Actions** ribbon group, click **Submit Copy**, or right-click the selected batch and select **Submit Copy**. A new batch is submitted based on the existing batch definition. A notification is displayed indicating whether or not the copy was successfully submitted.

Purging Report Capture Batches

In the event that your **Report Capture Administration** window becomes cluttered with a high volume of Report Capture batches, you may want to purge completed batches that were last modified on or before a certain date. To purge completed Report Capture batches, follow these steps:

1. Open the **Report Capture Administration** window.
2. In the **Actions** ribbon group, click **Purge**, or right-click an area in the **Batch List** and select **Purge**. The following dialog box is displayed:

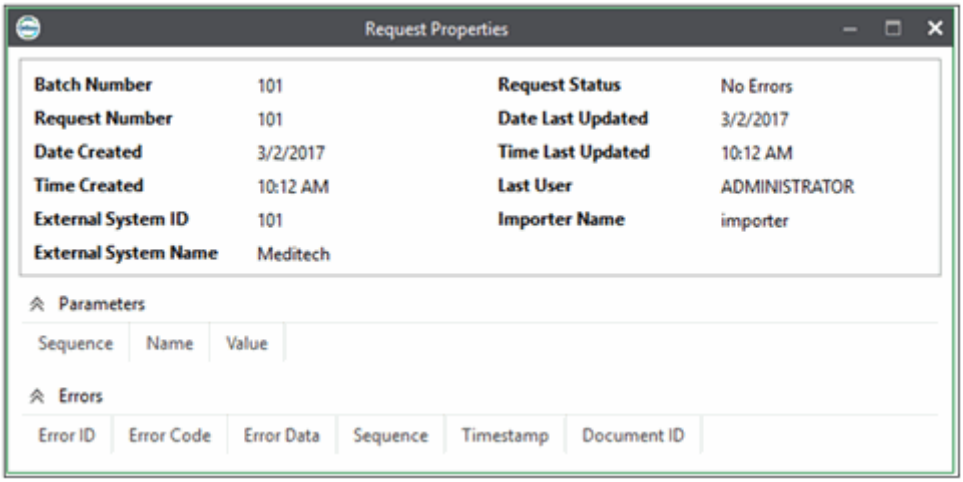


3. Select a valid date. Completed batches that were last modified on or before the selected date will be purged. The date must be in the past. The default date is 90 days before the current date.
4. Click **Purge** to purge the batches, or click **Cancel** to return to the **Report Capture Administration** window.

5. If you clicked **Purge** and the date selected is valid, a confirmation dialog box is displayed.
   - If you are sure you want to purge these batches, click **Yes**. The batches are purged and removed from the **Batch List**.
   - Click **No** to cancel the purge and return to the **Report Capture Administration** window.

Viewing Request Properties

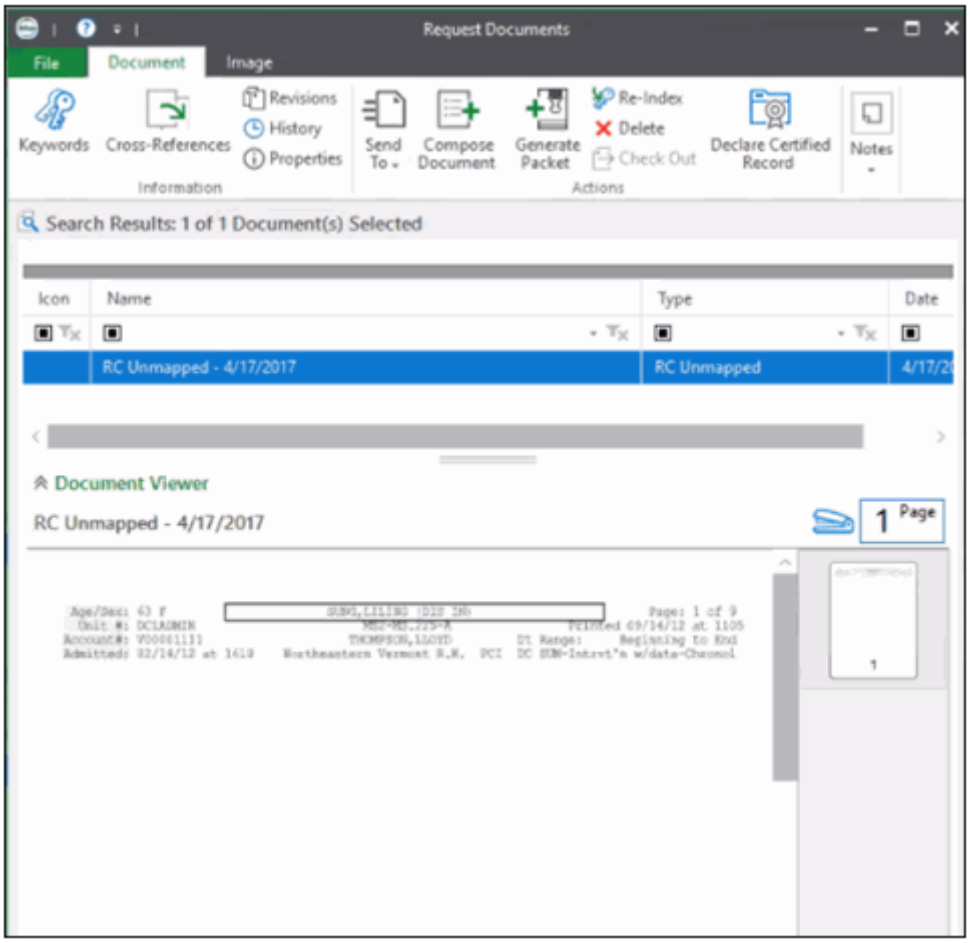
To view request properties and a list of parameters or errors belonging to a request, select a request in the **Request List**, then click **Properties** in the ribbon menu or right-click and select **Properties**. The **Request Properties** dialog box is displayed:



The properties of the request are displayed. To view parameters, ensure that the **Parameters** section is expanded. If the request is in an Error or Warning state, view error details by expanding the **Errors** section.

Viewing Request Documents

To view the documents associated with a request, select a request in the **Request List**, then click **Documents** in the ribbon menu or right-click and select **Documents**. The **Request Documents** dialog box is displayed:



This dialog box allows you to see a list of documents associated with the request. It also provides a document viewer for viewing individual documents associated with the request.

Working With the Report URN Keyword

When properly configured and mapped to the appropriate Meditech value, the **Report URN** Keyword Type can be used to identify unique reports for individual accounts. The Keyword Value that populates the **Report URN** field is actually a composite value consisting of several different Meditech components. When searching for Meditech reports or sorting by the **Report URN** Keyword Type in your OnBase system, note that, depending on the report type, the **Report URN** composite value reflects the individual Meditech components in one of the formats listed in the sections below.

Note: Depending on your configuration, your Meditech reports may not have a Keyword Type named **Report URN**. For more information, contact your system administrator.

LAB / BBK / MIC / PATH Specimen Inquiry Reports

The **Report URN** composite value takes the following format for any of the Specimen Inquiry Reports:

<module>_<collection.date>_<collection.time>_<prefix>_<number.part>_<spec.number>_<spec.urn>

Examples of **Report URN** values that follow this format are listed below:

Meditech Report Type	Sample Report URN Value
LAB Lab Specimen Inquiry Report	**L_20130723_1201_CH_1_0733:CH00005T_1856**
BBK Lab Specimen Inquiry Report	**B_20130723_1302_CH_1_0323:CH00009T_1976**
MIC Lab Specimen Inquiry Report	**M_20130723_1405_CH_1_0723:CH00007T_1775**
PATH Lab Specimen Inquiry Report	**P_20130723_1507_CH_1_0383:CH00003T_1332**

Working With the Document Date

When properly configured and mapped to the appropriate Meditech value, the **Document Date** of a report reflects the date typically considered to be the most meaningful date for the individual report type.

The following report types reflect the more meaningful date values for the **Document Date**. All other report types reflect the date that the report was initially filed in your Meditech system.

Meditech Report Type	Value Used for Document Date
Report Printed Via Scripting	Run Date
LAB Lab Specimen Inquiry Report	Specimen's Collection Date (i.e., **LAB.<module>.SPEC.collection.date**)
ITS Transcribed Report	Initialization Date (i.e., **RAD.RES.init.date**)
OE Report	Order Date (i.e., **OE.ORD.order.date**)