OnBase®

Foundation EP5

# Document Distribution

## Reference Guide

*Includes:*

Installation Guide

Administration Guide

User Guide

# Copyright



Document Name ........ Document Distribution

Department/Group ........ Documentation

Revision Number ........ Foundation EP5

# OVERVIEW



# INSTALLATION GUIDE

# INSTALLATION

## *ADMINISTRATION GUIDE*

## CONFIGURATION

## SCHEDULING

## DOCUMENT DISTRIBUTION WORKFLOW

## USER GUIDE

## USAGE

# Overview

The Document Distribution module primarily manages delivery of documents rendered from the Image Statements module. A Document Distribution Process is first configured to direct the delivery of the statements to the intended recipients according to unique keyword criteria or the Recipient ID. Then, based on a recipient's profile, the documents are distributed and can be faxed, emailed, printed, distributed on CD/DVD, or made available for online viewing through the OnBase Web Client or a third-party Web site that is integrated with OnBase. The Document Distribution Process is initiated when a Render Statement request is made for a specific document type. (Remember Statement Rendering identifies a common keyword value between its configured primary and secondary documents.)

Features of this module include a Workflow to automate and manage the distribution process, although the user can distribute "ad-hoc" in any given situation. Also, if any delivery is unsuccessful, the system can attempt to re-send email and faxes for a specified number of times. Documents that are not associated with Image Statements can also be distributed.

## Applications

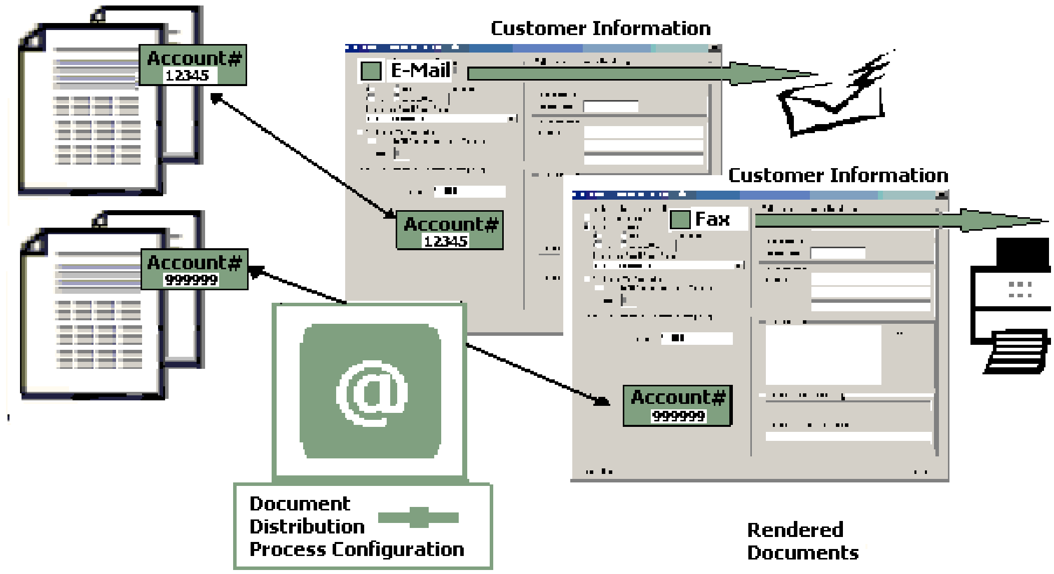
The following are some examples of rendered documents (primary and secondary documents, matched using the Image Statements module) that can be delivered via the Document Distribution module:

- Bank checking statements supported by check images
- Insurance profiles supported by application, policy and claim images
- Police investigation cases supported by crime report, evidence and lab work images
- Construction projects supported by customer profile, job map and service order images
- Hospital patient profiles supported by medical records, charts and x-ray images
- Manufacturing and service bureau invoices supported by packing slip and proof of delivery images

### Distribution Methods

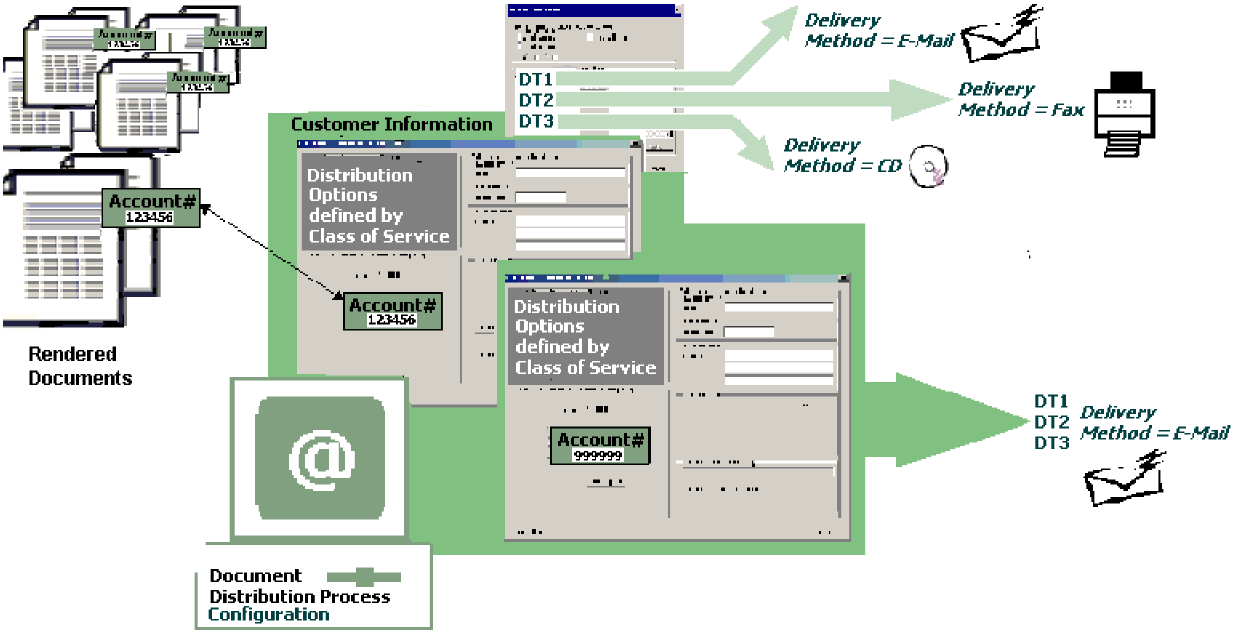
Distribution Processes can use either of two methods for distributing documents, depending on whether a Class of Service is defined for the process or not.

For Document Distribution processes that do not use the Class of Service feature, the method of distribution is determined by the settings defined at the **Customer Information** dialog box. If the keywords defined at the **Customer Information** dialog box match Customer ID keywords configured for a Distribution Process, the rendered documents are delivered to that customer. The delivery method, therefore, can be configured on a customer-by-customer basis.




For Document Distribution processes that use Class of Service control, the distribution method is defined for a group of recipients, or “class.” Class of Service processes allow for configuration of the distribution method at the document type level for each recipient in the class.

Since a Class of Service is configured with a single distribution scheme, the **Distribution Options** portion of the **Customer Information** dialog box for any recipient associated with a Class of Service distribution is insensitive, and cannot be modified. These options are defined at the class level, and then recipients are assigned to the desired class.




# Example

A bank offers three types of Checking Accounts: Basic, Checking Plus, and Premiere Checking. All three types provide for monthly statements, account notices, and advertisements.

## Basic Document Distribution

Using basic Document Distribution settings, all the document types associated with the checking account (statement, notices, advertisements) are distributed per the specified matching keyword; usually, Account Number. Different distribution methods can be varied at the recipient level, based on the matched keyword.

| Account Number | Account Type | Documents Delivered | Delivery Method |
|---|---|---|---|
| 1234567890 | Checking | Statements | Email |
| | | Notices | Email |
| | | Advertisements | Email |
| 45645456 | Checking | Statements | Fax |
| | | Notices | Fax |
| | | Advertisements | Fax |

### Class of Service

If a Class of Service is assigned to the distribution process, specific settings can be made at a document type level to direct the distribution method. Each document matched can be delivered via a separate distribution method, using the same recipient information.

| Account Number | Account Type | Documents Delivered | Delivery Method |
|---|---|---|---|
| 1234567890 | Checking Plus | Statements | Web Posting |
| | | Notices | Email |
| | | Advertisements | Email |
| 45645456 | Premiere Checking | Statements | CD |
| | | Notices | Web Posting |
| | | Advertisements | Email |

# Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Document Distribution 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 4.
- If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, or if you require the use of functionality provided by the Electronic Invoice Distribution, CD Authoring, DVD Authoring, Automated CD Authoring, or Automated DVD Authoring licenses, see Legacy Licensing on page 5.

## Simplified Licensing

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

### Additional Licensing

Additional licensing may be required to use the following products in conjunction with Document Distribution:

- Workflow
- E-Forms

For the licensing requirements of a specific product, see that product’s documentation.

# Legacy Licensing

Document Distribution dialog boxes requires the following licenses to render statements and distribute those documents:

- Document Distribution
- Image Statements

Optional licenses include:

- Workflow User
- Electronic Invoice Distribution
- CD Authoring
- DVD Authoring
- Automated CD Authoring
- Automated DVD Authoring

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

**Note:** An E-Forms Institution License is required to use the E-Forms included with the Document Distribution Workflow. E-Forms can be configured for the Document Types associated with the Document Distribution Workflow only.

**Note:** It is possible to render primary statements ONLY and distribute them without an Image Statements license.

OnBase®
Foundation EP5

# Document Distribution

## Installation Guide

Foundation EP5

# Requirements

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

## General Requirements

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

- Database Requirements
- Supported Desktop Operating Systems
- Microsoft .NET Framework Requirements
- Microsoft Visual C++ Requirements
- Web Browser Requirements
- Processing Workstation Minimum Hardware Requirements
- CD/DVD/Blu-ray Authoring Workstation Requirements
- Web Client Hardware Requirements (when using Document Distribution with the Web Client)
- Unity Client Platform Hardware Requirements (when using Document Distribution with the Unity Client)
- Miscellaneous Requirements

## Licensing

See Licensing on page 4 for licensing requirements.

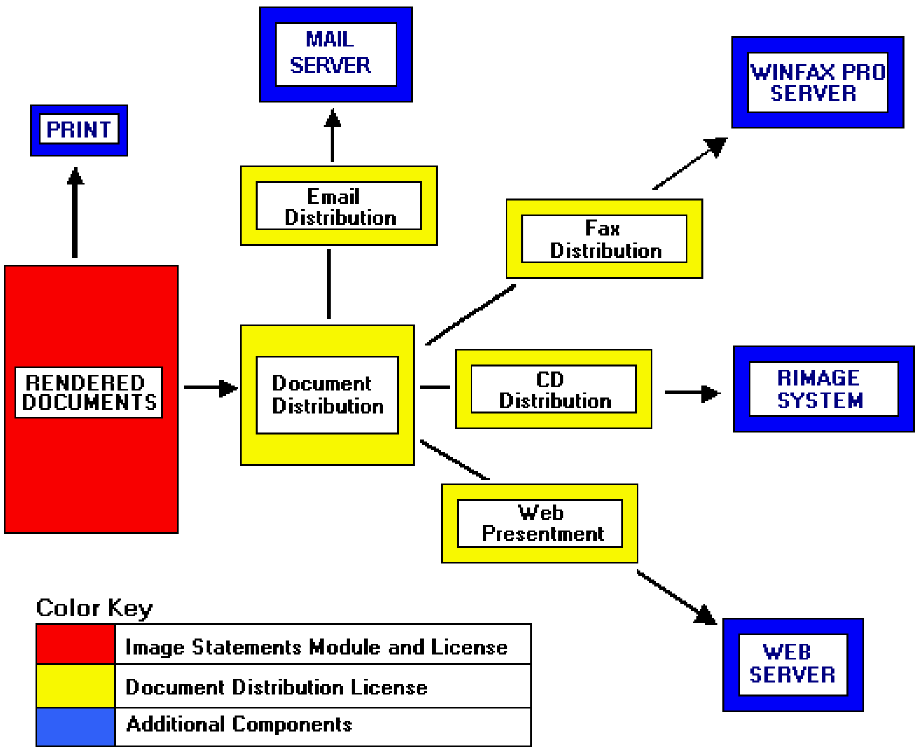
# Upgrade Considerations

There are no additional upgrade considerations for this module.

# Pre-Installation

Ensure that the necessary third-party software has been installed. The following Document Distribution matrix displays the components of Document Distribution required for specific distribution methods.




- For fax distribution, install WinFax Pro (version 8.0 or greater)
  See Install Client at a Fax Server Workstation on page 11..
- For email distribution, install the desired mail service/server.
  See Install Email Distribution Server at a Client Workstation on page 9..
- For CD Distribution, install the Rimage software.
  See “Integrating Automated CD/DVD Creation and OnBase.”
- For sending notifications with a URL back to a web site, install Web Server (WTMPW1) and the desired mail service/server.
- Sybase™ SQL Anywhere restricted run-time database license (sold separately).
- Sybase™ SQL Anywhere standalone database (sold separately).

For distributing to CD/DVD, you will need any of the following units:

- CD or DVD unit (sold separately).
- Rimage System (sold separately).

# Install Email Distribution Server at a Client Workstation

When installed, the Email Distribution Server operates within the OnBase Client to queue up and order mail messages, based on the priority of the message.

Upon startup of the OnBase Client, the mail server is created. During this creation process, the server identifies the mail system to connect to, checks for the existence of the dmMailServices.dll, and checks for compatibility with the installed mail system.

The mail system is logged into once a message is sent outside of OnBase. (Sending internal mail within the OnBase system will not trigger a logon event.) Once a session with the mail system has been created, the connection is kept active until the OnBase Client has been shut down, at which point the mail system is logged out.

## To Install Email Distribution Service:

1. Copy the dmMailServices.dll provided with the software to the OnBase Client workstation, into the same directory where the OnBase executables are located.
2. Obtain a command prompt, and type the following command to register the dll:

   **regsvr32 dmMailServices.dll**

**Note:** For file registration in a 64 bit environment, regsvr32 should be launched from C:\Windows\SysWow64.

3. Setup the OnBase Client to run using the **–STMTMAILSRVR** command line switch.
4. Install the desired mail service at the OnBase Client workstation. Follow the standard installation instructions provided by the vendor.

   The default user profile defined in the mail service is always used when sending mail via Document Distribution, unless there is an SMTP Mail Account configured in the OnBase Client for the currently logged in user. To define an SMTP mail account for an OnBase user, refer to “Configuring an SMTP Account” in the following text.

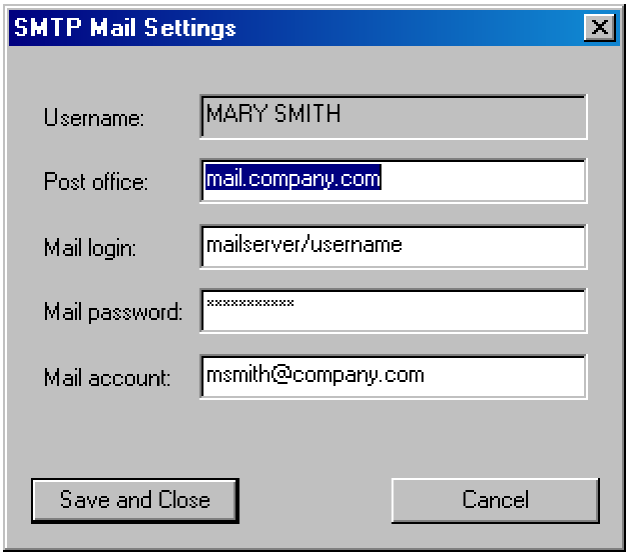
**Note:** The OnBase SMTP Mail Account is only used if the mail service is set up to use SMTP.

The **-STMTRESENDTIME="#"** switch can be used in addition to the **–STMTMAILSRVR** switch to specify the amount of time between scans for undelivered emails in a user’s inbox. The # is the number of minutes between undelivered scanning. The distribution queue will still be scanned every 15 seconds for mail to be sent.

## Configuring an SMTP Account

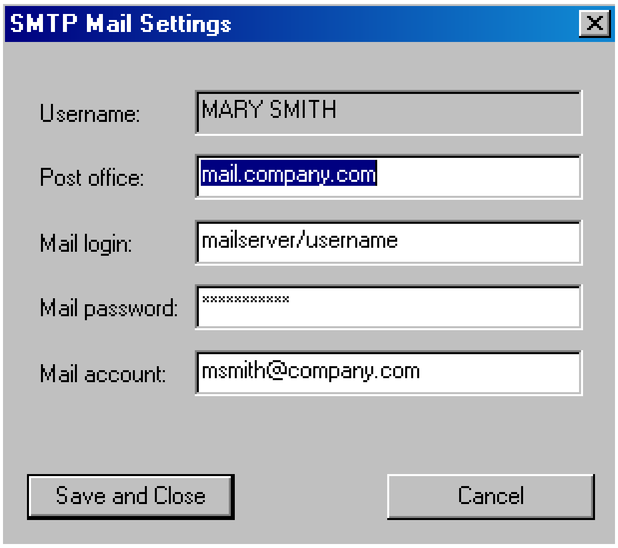
To define an account in the external SMTP mail service for use when sending mail via Document Distribution.

1. In the Configuration program, select **Users** at the main menu bar, then select **User Names/Passwords**.
2. At the **User Names & Passwords** dialog box, highlight the user whose mail account will be configured, then click **SMTP Mail** to access the **SMTP Mail Settings** dialog box.




3. At the **SMTP Mail Settings** dialog box, provide values for the following mail settings:
   - **Post office** – the URL of the Mail Server
   - **Mail login** – the username for the SMTP account in the format ***<mailserver>/<username>***
   - **Mail password** – the password for the SMTP account

- **Mail account** – the mail address of the user
- When all settings are complete, click **Save and Close**.




# Install Client at a Fax Server Workstation

**Note:** As of June 2006, WinFax Pro has been discontinued. WinFax Pro will still be supported as the default for an OnBase system. For customers who cannot obtain WinFax Pro, however, Captaris RightFax is also supported.

## WinFax Pro

1. Install WinFax Pro at the fax server workstation. Follow the WinFax installation procedures and make choices that are appropriate for this location.
2. Install the OnBase Client at the fax server workstation.
3. Setup the OnBase Client to run using the **–STMTFAXSRVR** command line switch.

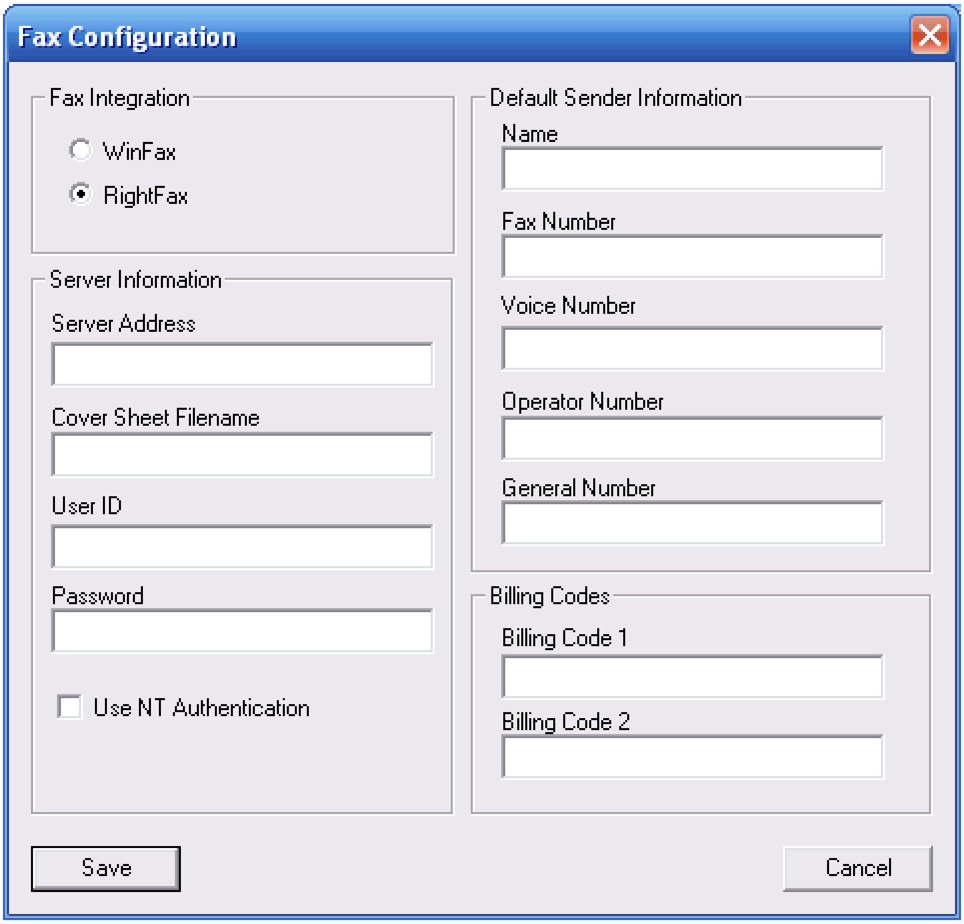
   Multiple fax servers can be set up. The fax server will look for new jobs every 10 seconds. The first fax server to find the available job will try to send it. There is no priority or load balancing setup for fax servers. The fax server will check every 50 seconds for jobs that need to be resubmitted.

## RightFax

**Note:** A RightFax server must be installed and available.

1. Install the OnBase Client at the fax server workstation.
2. Set up the OnBase Client to use the **-STMTFAXSRVR** switch.

3. In the Configuration module, select **Printing | Document Distribution | Fax Configuration**. The **Fax Configuration** dialog box is displayed.




4. Select the **RightFax** radio button.

**Note:** The **WinFax** radio button is selected by default. No configuration in this dialog box applies to WinFax. To configure WinFax Pro for use with Document Distribution, see WinFax Pro on page 11.

5. Fill in the appropriate options. Each option is described in the table below:

| Option | Description |
|---|---|
| **Server Information options** | These options contain configuration information for the RightFax server. |
| **Server Address** | Enter the IP or DNS address of the fax server that will be used. |
| **Cover Sheet Filename** | Enter the file name for a specific cover sheet to be used in the distribution. If a file name is not specified, the RightFax default cover sheet for the user account will be used. |

| Option | Description |
|---|---|
| **User ID** | Enter a user ID to log in to the RightFax server with. |
| **Password** | Enter the password that corresponds to the User Name for logging in to the RightFax server. |
| **Use NT Authentication** | Check this box to use Active Directory Authentication. This is only functional if the RightFax server supports Active Directory Authentication.<br>**Note:** When **Use NT Authentication** is selected, the **Password** field is disabled. |
| | |
| **Default Sender Information options** | These options will display on the fax cover sheet. If any option is not specified, the user account defaults (configured on the RightFax server) will be used. |
| **Name** | The name of the sender. |
| **Fax Number** | The fax number the sender can be reached at. |
| **Voice Number** | A specific phone number the sender can be reached at. |
| **Operator Number** | A number for the operator of the company switchboard |
| **General Number** | A general number the sender can be reached at |
| | |
| **Billing Codes options** | These optional fields specify billing codes for what is being faxed. |
| **Billing Code 1** | Enter the first billing code. |
| **Billing Code 2** | Enter the second billing code. |

6. When finished, click **Save**.

All RightFax jobs generated by Document Distribution are configured for high priority sending. Fax recipient information is stored in Customer Information.

# Integrating Automated CD/DVD Creation and OnBase

The Rimage Unit is capable of producing CDs and DVDs from files stored on a network. Rimage is installed to its own workstation that runs the Rimage software. It is required that this workstation be attached to the network with rights to read the document files that are to be written to disc.

It is recommended that this workstation use only a single logon to the network, as the Rimage software stores its configuration in the registry by user. If multiple users log on to the Rimage workstation, then each user must configure the Rimage software in order for the system to operate properly.

To perform automated CD/DVD creation, it is recommended that the OnBase Client is installed on the Rimage workstation. Although the Client that generates the Rimage requests does not have to reside on the Rimage workstation, it greatly simplifies the integration.

## Rimage Unit

Prior to installing the components specific to your automated processes, the Rimage Unit must be installed and functioning to specification.

## Rimage Workstation

The Rimage software and OnBase must be installed and properly configured to communicate in order for your automated processes to function correctly. All Rimage installation files are available from your service provider.

## Configuring the Rimage Software on the Rimage Workstation

Rimage provides three programs that complete your automated solution. These are the Image Order Server, Production Order Server, and the CD label designer software. The Image Order Server software produces a CD image and verifies the existence of the files to be placed on a CD. The Production Order Server software controls the robotics of the Rimage CD Producer. The CD label designer software can be used to customize the default label files that are supplied with the Document Distribution software.

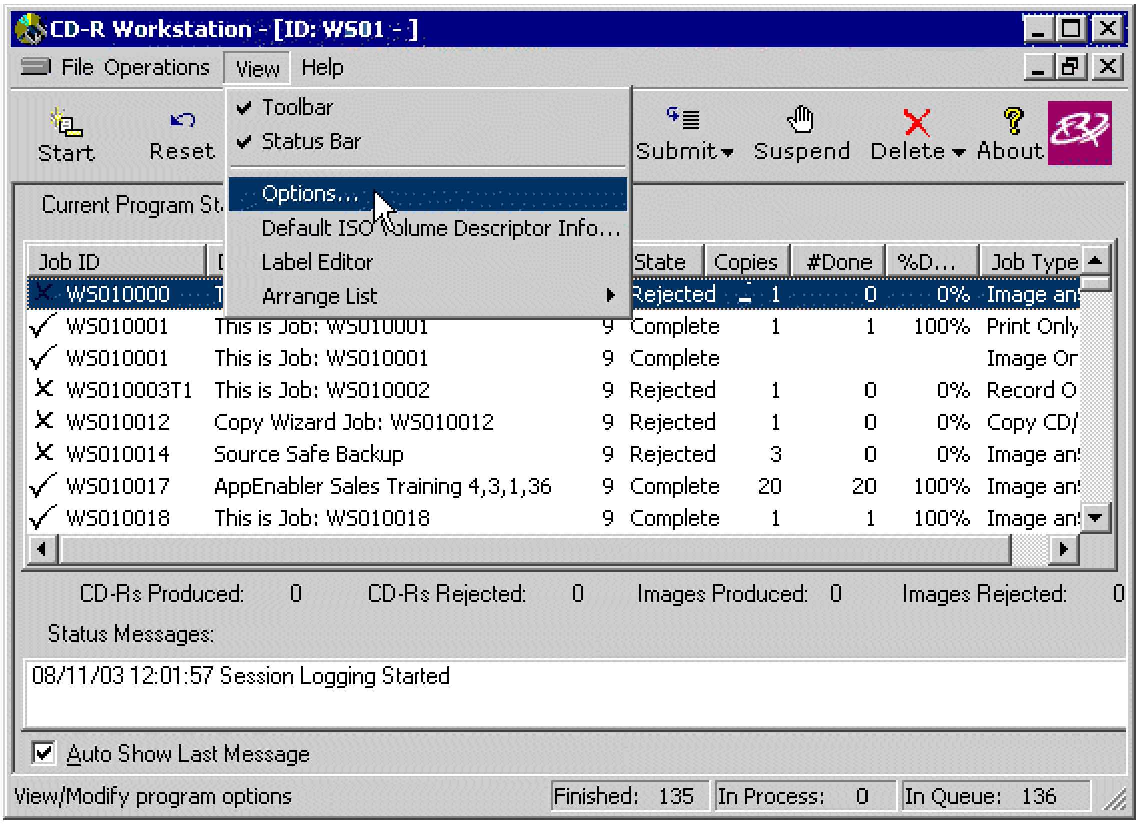
1. Install the Rimage server per instructions supplied by Rimage. If the system was purchased from Rimage as a complete hardware/software solution, then this software should already be installed on the Rimage workstation that came with your purchase.
2. Create a folder on the Rimage workstation for the Image and Production Order Files.
3. Create a shared directory for temporary files (most of which are under 2K). The **RimTemp** folder, usually located at **C:\RimTemp**, is intended for this purpose.

**Note:** The temporary folder must be shared on the network.

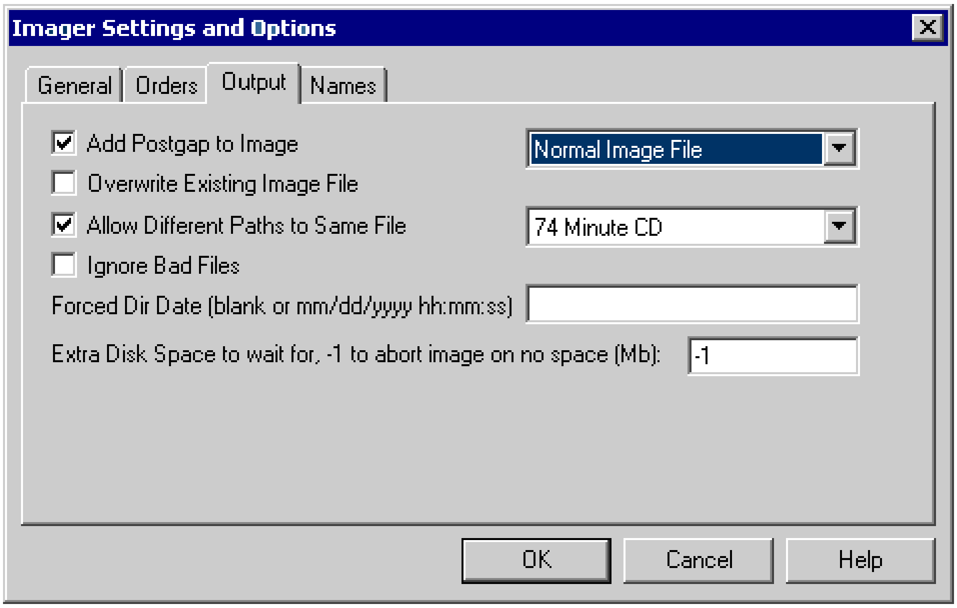
4. Set up privileges to allow the Rimage server to have network access to the OnBase file server. Without this access, it will not be capable of creating back-up or export discs.

   It is a best practice to use a single network logon for the Rimage workstation to ensure that the same icons and network access privileges are always available when a disc needs to be produced.

5. Start the Image Order Server and select **View** from the main menu bar, followed by **Options**.



6. Configure the options on the **Output** tab as indicated below.

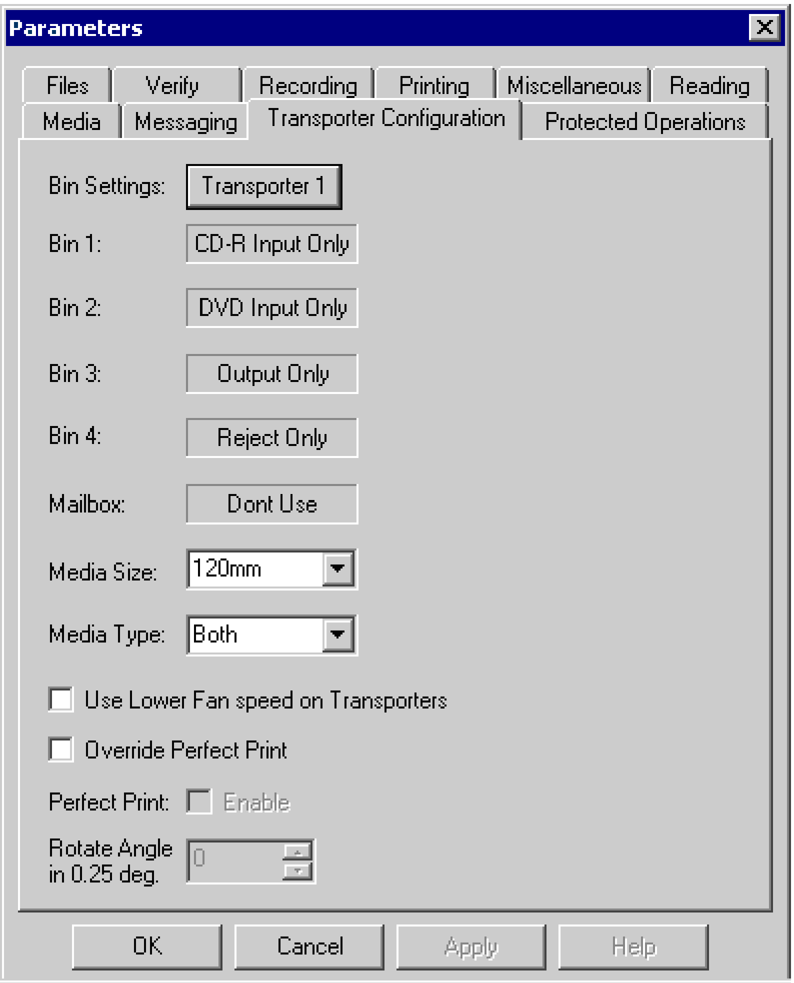



- **Normal Image File** must be selected at the first drop-down menu.
- The options on the remaining tabs of the **Imager Settings and Options** dialog box should remain unchanged.

7. Start the Production Order Server and confirm proper configuration of the values at the **Parameters** dialog box.

   If you are writing to both CD and DVD media, the **Media Type** drop-down should be set to **Both** for proper operation.

   All other parameters should remain at their default settings.



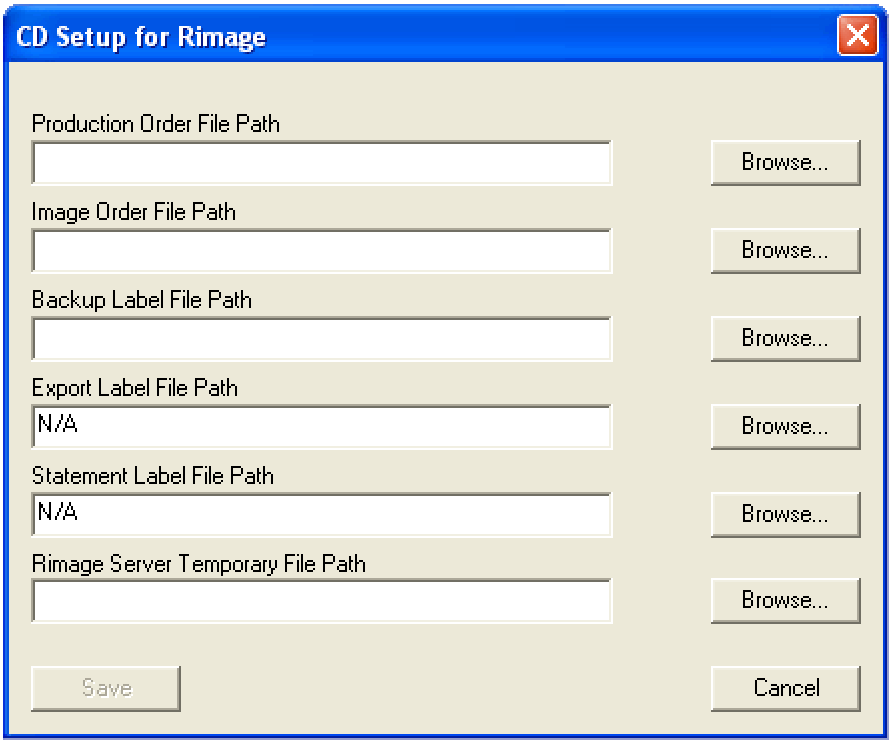

## Configuring the OnBase Client on the Rimage Workstation

The OnBase software necessary to automate disc creation for Document Distribution consists of the OnBase Client and its regularly required DLLs, as well as its configuration to communicate with Rimage.

The OnBase Client software communicates with Rimage through a pair of Rimage files, the Image Order File and Production Order File. These files must be configured for both the Rimage software and the OnBase Client. To configure the OnBase Client for use with Rimage, complete the following steps.

**Note:** The settings in the **CD Setup for Rimage** dialog box are specific to the current Windows user.

1. In the Client go to **File | Rimage Setup** and populate all of the path fields in the **CD Setup for Rimage** dialog box:




2. Enter the paths to the **Production Order File Path** and the **Image Order File Path**. It is mandatory that these paths are identical to the paths configured for Rimage when the Rimage software was installed.

3. Enter the path to appropriate label file in the **Backup Label File Path**, **Export Label File Path**, or **Statement Label File Path** fields. A path can be entered in one or all of these fields, depending on how your system is being used. If a label type is not going to be used, leave that field populated with the default of **N/A**.

**Note:** If no label is assigned for an automated export or automated publishing job, or if the label assigned is invalid, the job is canceled and removed from Rimage. This error is written to the **SYS - Automated CD Reports** log file, archived in OnBase and accessible through the OnBase Client.

Four label files are provided with the OnBase installation: A back-up label file (**backup.btw**), an export label file (**export.btw**) and two statement label files (**statement.btw** and **statement2.btw**). Create a folder to store these labels. This folder can be created at any network location, but it is a best practice to use the same folder where the Client software is installed, in order to limit the locations of required files and simplify file maintenance.

You can customize any of the label files with the CD label designer software provided with the Rimage Unit, to add a company logo or other plain text, but the label will only supply the merge fields described in this section. No additional values can be merged into the label.

**Caution:** When you customize these labels, do not remove any fields that exist already on the label, and do not change the field data sources from their original specifications. It is important that any changes you make do not eliminate or alter the meanings of the supplied merge fields. They must remain with the same field number order for the labeling to function properly.

- The **backup.btw** file is intended for use with disk group back-ups using Document Distribution. It contains the following predefined merge fields, in this order:

| Merge Field | Description |
|---|---|
| 1 | Disk Group Number |
| 2 | Disk Group Name |
| 3 | Logical Volume Number |
| 4 | Copy Number |
| 5 | Produced On |
| 6 | Volume Created |
| 7 | Volume Promoted |
| 8 | Disposition Date |

- The **export.btw** file is intended for exporting disk group platters and requires Document Distribution and Export. It contains the following predefined merge fields, in this order:

| Merge Field | Description |
|---|---|
| 1 | Disk Group number |
| 2 | Disk Group name |
| 3 | Logical Volume number |
| 4 | Job Date |
| 5 | Creation date and time of the exported volume |
| 6 | Promotion date and time of the exported volume |
| 7 | The Institution Name of the Institution whose default Disk Group is the Disk Group associated with the exported volume.<br>**Note:** This field is left blank if the associated Disk Group is not the default Disk Group of any Institution. |

- The **statement.btw** and **statement2.btw** files are intended for use with document distribution modules, such as Document Distribution. They contain the following predefined merge fields, in this order:

| Merge Field | Description |
|---|---|
| 1 | Date the distribution job was sent to Rimage |
| 2 | Recipient name |
| 3 | Recipient address line 1 |
| 4 | Recipient address line 2 |
| 5 | Recipient address line 3 |
| 6 | CD # x of y (where **x** is the current disc and **y** is the total number of discs in the distribution) |
| 7 | Account number (available in **statement2.btw** only) |
| 8 | Document date (available in **statement2.btw** only) |
| 9 | Recipient address line 4 |

4. In the **Rimage Server Temporary File Path** field, enter the path of the temporary folder that you created when the Rimage software was installed.
5. Click **Save**. The appropriate entries for the Rimage integration are made in the registry on the workstation.
6. In order to poll the OnBase database, the OnBase Client configured for use with Rimage must be launched under the **-AUTOWRITECD** switch.

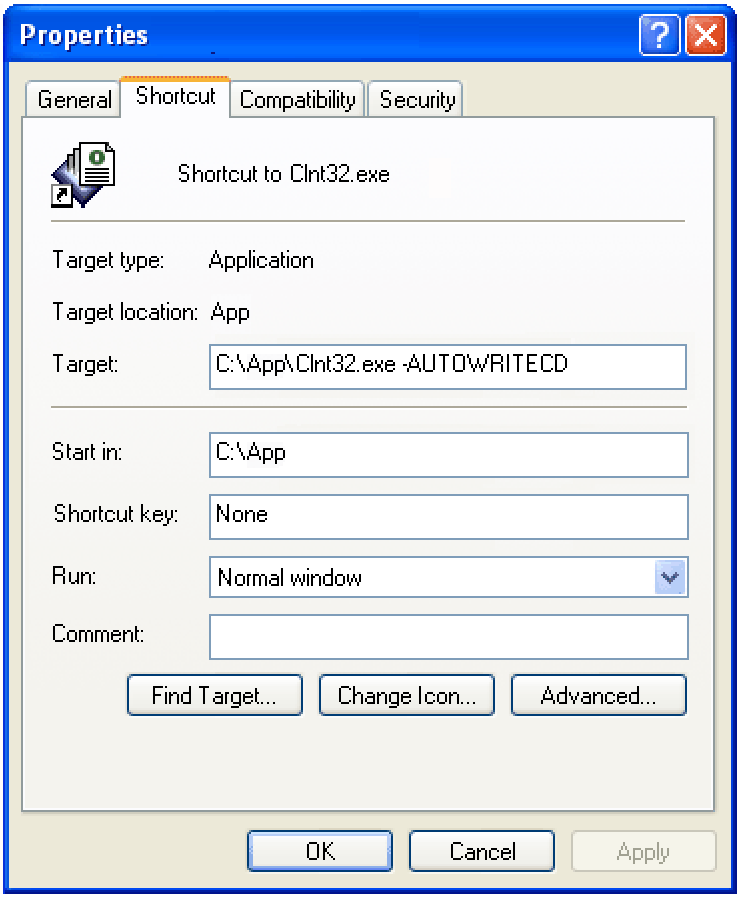
   This switch initiates workstation polling of the database for Document Distribution and for user requests. The polling rate is established by the OnBase user account logged on to the workstation. The **Document List Refresh Rate** set on the **General** tab of the **User Options** dialog box is used as the polling rate. The document refresh rate is configurable from 100 to 1,000 seconds.

**Note:** The service will not start if the client has been running for longer than 24 hours. In order for the service to be executed daily, the client must be restarted each day after the configured time window has elapsed.

To apply the **-AUTOWRITECD** switch:

a. Select the icon used to launch OnBase and select **Properties** from the right-click menu.

b. In the **Target:** field, type **-AUTOWRITECD** (prefaced by a space) at the end of the target path. Select **Apply** then **OK** to exit the dialog.



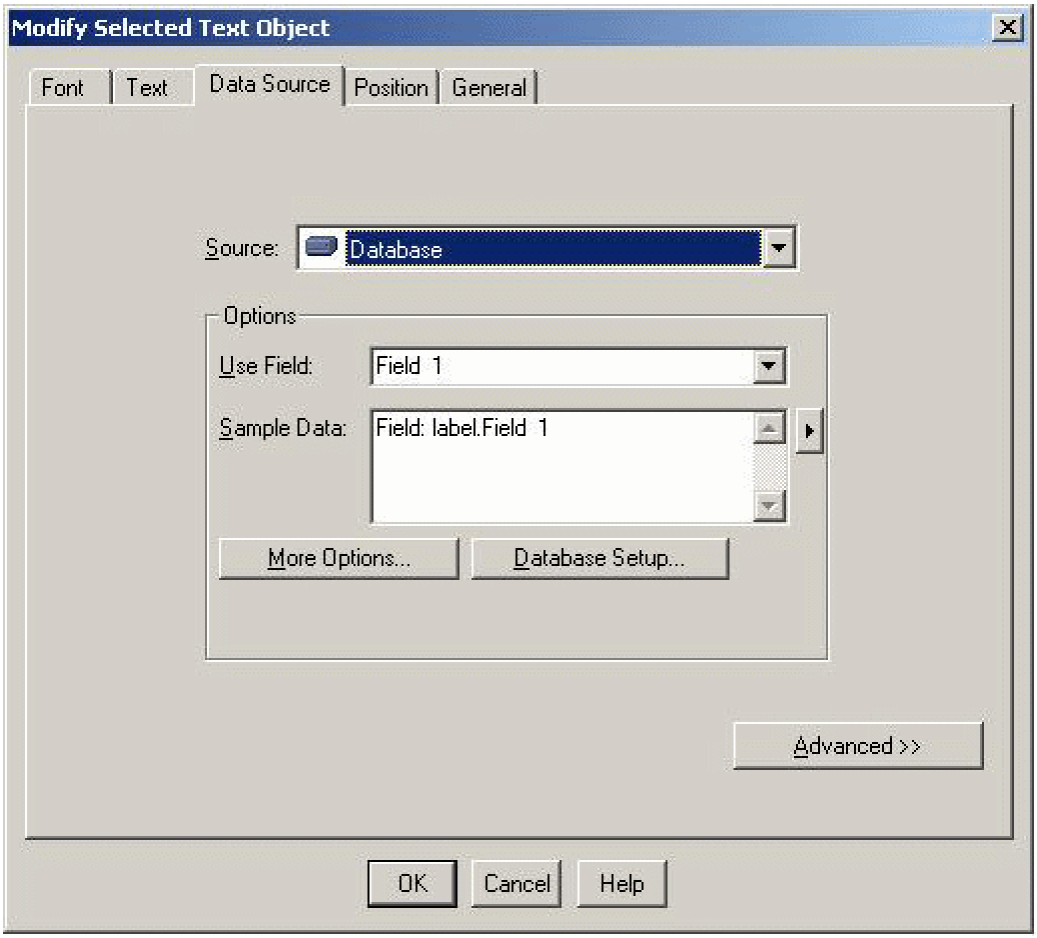

## Configuring a Rimage Label with Merge Fields

**Note:** This section is intended only as a guide to illustrate how merge fields generated by the OnBase Client can be used with the CD Designer software provided by Rimage. It may not be a current or accurate representation of the Rimage CD Designer software. Please consult the documentation from Rimage for details on using the Rimage CD Designer software.

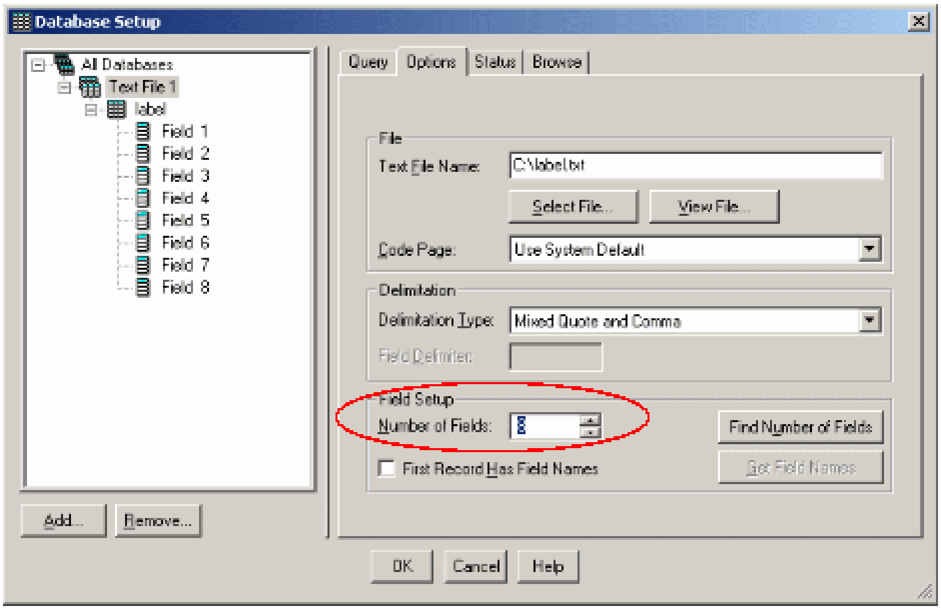
To add OnBase merge fields to the Rimage CD/DVD label:

1. In the label creation window of the Rimage CD Designer software, open the OnBase label file you wish to edit (e.g., **backup.btw**, **export.btw**, or **statement.btw**).
2. Add a text block to the label and double-click on it in order to access the **Modify Selected Text Object** window.

3. In the **Modify Selected Text Object** window, select the **Data Source** tab.
4. From the **Source** drop-down list, select **Database** or **Database Field** (depending on the software version). This activates the **Use Field** or **Field Name** drop-down list.



5. Before adding a new field, you must first click **Database Setup** or **Database Connection Setup** to allow for the additional fields. This opens the **Database Setup** window:




6. Under the **Options** tab, increase the value of the **Number of Fields** field to represent the total number of merge fields you plan to use on the label, then click **OK**. You return to the **Modify Selected Text Object** window.
7. From the **Use Field** drop-down list, select the merge field the text block should represent. You do not have to use all of the merge fields that are defined by OnBase for the selected label type.
8. Click **OK** to close the window.
9. Repeat steps 1-8 for each merge field you wish to add.
10. Once your label is configured with the correct merge fields, save it to a location accessible by Rimage and add the path to it in OnBase.

**Caution:** Each of the these label files has specific merge fields, defined in a specific order, to allow data from the Client to be added to the Rimage label. You may customize any of the label files with the CD Designer software provided with Rimage, to add a company logo or other plain text. However, when you customize a label, do not remove any fields that exist already and do not change the field data sources from their original specifications.

## Configuring Rimage Labels for Use with Institutional Databases

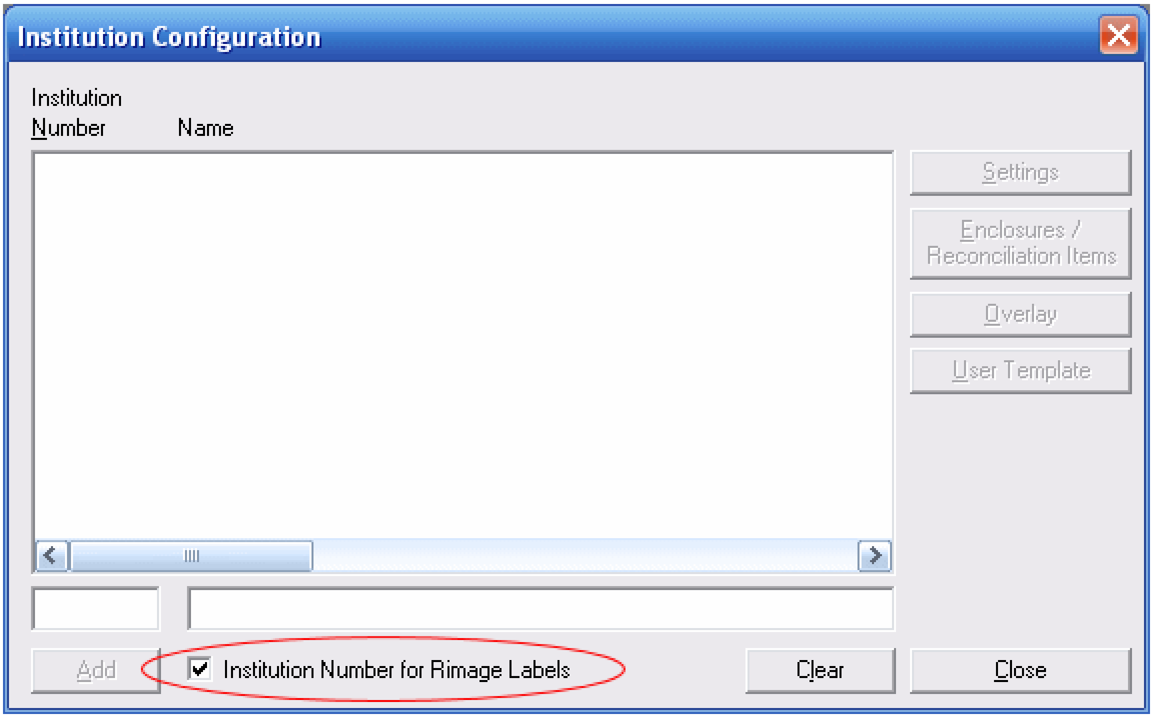
Institutional-specific label files can be created for use with CDs or DVDs produced in an institutional database environment. To create these labels:

1. Locate the label file to be used with Rimage and make a copy of it in the same folder.

   For example, if you need an institutional label for the export label, make a copy of the **export.btw** file.
2. Rename the copy of the label using this format: **<label>n.btw**, where **<label>** represents the type of label (**backup**, **export**, or **statement**) and **n** represents the institution number.

   For example, to create separate labels for all export volumes produced across institutions 101, 102, 103, 104, and 105, copy the **export.btw** label file five times and rename the copies **export101.btw**, **export102.btw**, **export103.btw**, **export104.btw**, and **export105.btw**.
3. Edit the new institutional label file as you would a standard label file.
4. In the OnBase Configuration module, select **Utils | Institution Names**. The **Institution Configuration** dialog box is displayed.

5. Select **Institution Number for Rimage Labels** and click **Close**.




Selecting this option configures OnBase to automatically append the institution number to the label file name entered in the **CD Setup for Rimage** dialog box.

**Note:** In the **CD Setup for Rimage** dialog box you still enter the path to the standard label file, without an institution number appended (e.g., **export.btw**). With the **Institution Number for Rimage Labels** option selected, OnBase is configured to automatically append the institution number to the label path entered. In this way, **export.btw** actually points to **export00.btw**, where **00** corresponds to the institution number creating the disc.

# Prepare Distributions for Export to CD

Assign the primary document type and secondary document type(s) to the user group assigned to the export format. If this is not done then the recipient will not be capable of doing research against all of the images that comprise the statement.

Assign the **Complete Rendered Statement** Document Type to the user group assigned to the export format. This will allow the recipient to reprint the statement as if it was sent to them through the mail.

Configure the rendering workstation for export. In order to get the best performance at rendering time it is best to set the export folder on this machine locally so it does not pull the template files across the network.

Choose **Auto CD-R** in the export format that you created for CD distributions. The folder that you assign here should be in **UNC** format, on this same workstation, and accessible by the Rimage workstation. This folder will be a temporary holding location of the export. All of the required transient files for export will be copied to this location. It is important that this folder be on a drive that has enough free space to support the export requirements of all simultaneous CDs to be distributed.

When the Rimage Client identifies a job to be burned to CD it will pull these files from this location and compose the CD. When the CD has been completed successfully the Rimage workstation will remove the files from this folder. If you remove a CD distribution from the queue then these files will be left behind and will need to be manually removed.

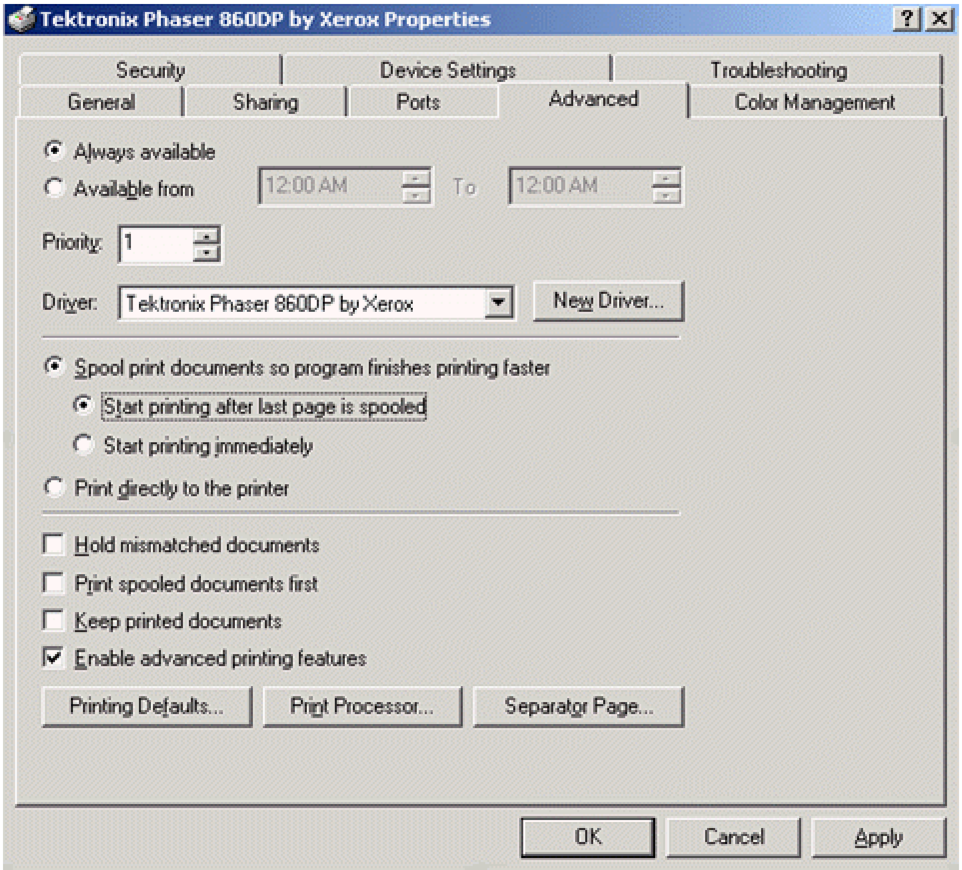
Assign this export format to an export manager. It is best to not override any export warnings until you are certain that the format is configured correctly. This export manager is assigned to the statement type.

If the distribution spans multiple CDs then they will be labeled appropriately.

## Default Printer Configuration

A default printer must be set up on this workstation for Document Distribution to function. The default printer is required because a job is spooled as a print job and is then canceled before it is faxed.

This printer must be defined to the operating system as **Start printing after last page is spooled** otherwise the job may begin printing on the printer even though it is configured to be distributed electronically.




# Installation

Document Distribution uses the parameters configured in a Distribution Process to direct the way in which rendered statements are delivered to customers. Certain configuration parameters require certain setup procedures before they can be specified for use in the Distribution Process. These include:

- License Distribution Recipients
- Document Distribution Workflow
- Document Distribution Delivery Templates
- Document Distribution Server

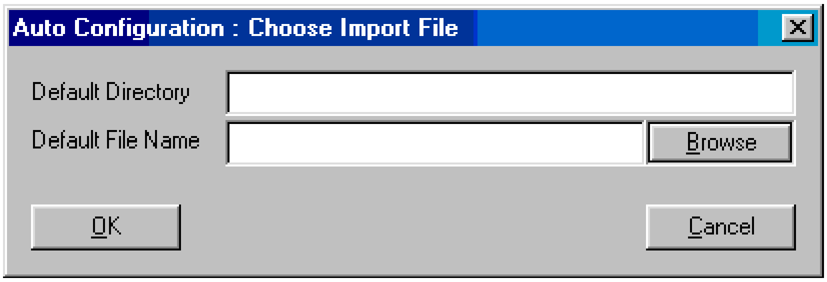
## License Distribution Recipients

Install Distribution Recipients via Configuration licensing. These licenses are sold in blocks of 250 recipients. As you create recipient records they will be subtracted from this total until all are defined. When the quantity you licensed are created you would need to increase your number of recipients by licensing more before being able to create more recipient records.

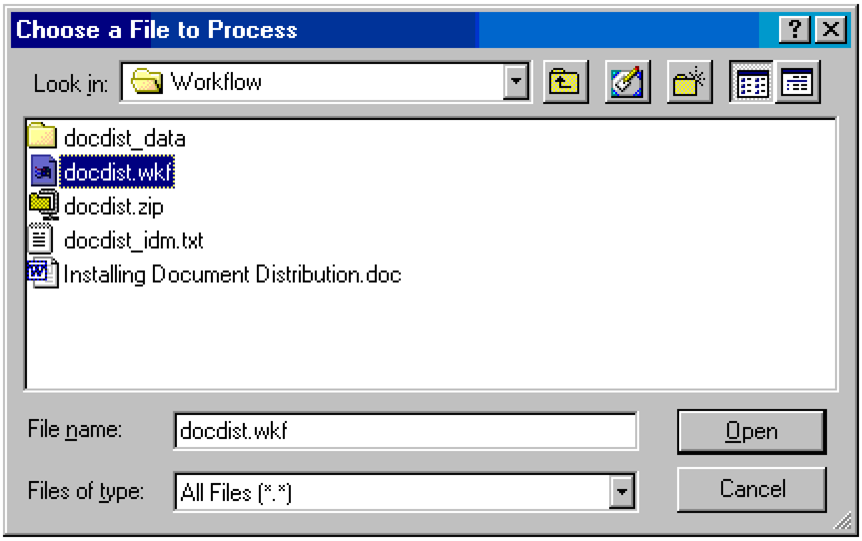
## Import the Pre-Configured Workflow File Provided with the Build

Extract the Document Distribution Workflow zip file into a temporary folder. This zip file contains the Workflow file **DOCDIST.WKF** that will be imported along with these instructions and all bitmap, icon and HTML documents that support the Workflow. It is important that these files are kept in their relative folders and that the **DOCDIST.WKF** file be imported from this temporary location. When the Workflow has been imported these files can be removed from the system.

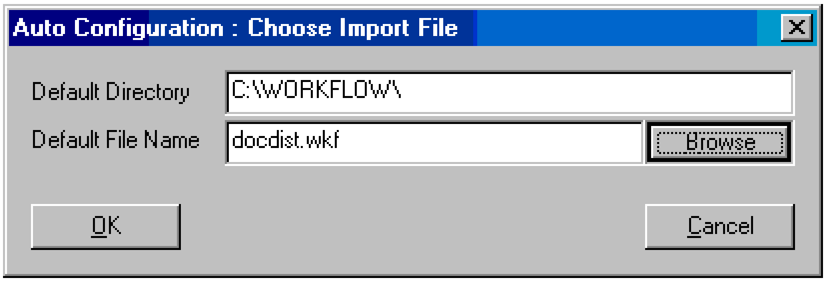
1. Log in to the Configuration module and choose **Utils | Configuration Exporter | Import** at the menu bar. The **Auto Configuration: Choose Import File** dialog box is displayed.




2. Select **Browse** and the **Choose a File to Process** dialog box will appear. Locate the **DOCDIST.WKF** file that you extracted from the zip file.



3. Double-click the **DOCDIST.WKF** file and the **Auto Configuration: Choose Import File** dialog box appears populated with the directory and file name.




4. Select **OK** and the **Auto Configuration** dialog box appears displaying a message that records are going to be imported into the database.

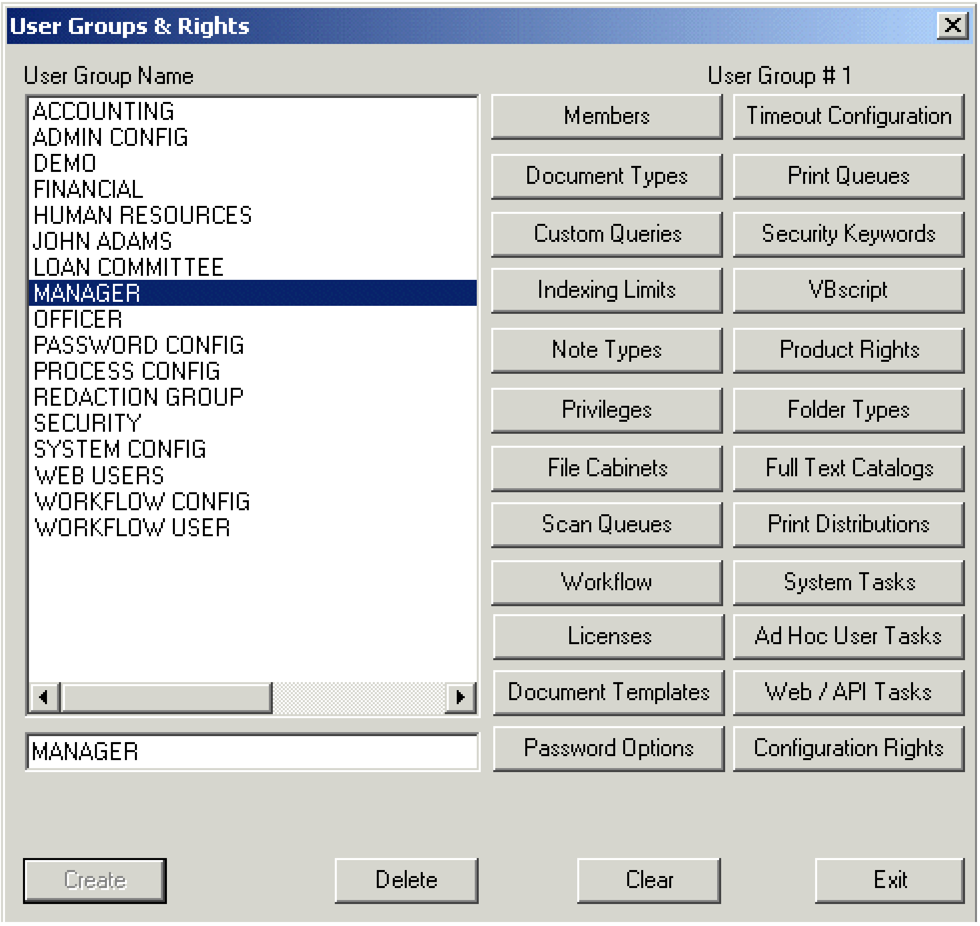

5. Select **Yes** to import the file. When the **Auto Configuration** dialog box disappears, the import is completed.

   Workflow importing is capable of overwriting and updating previous versions of the workflow. When this occurs, you will receive warnings about the records being imported already existing. If you see these messages and you know you are overwriting or updating a prior version of the workflow, then choose to ignore them.

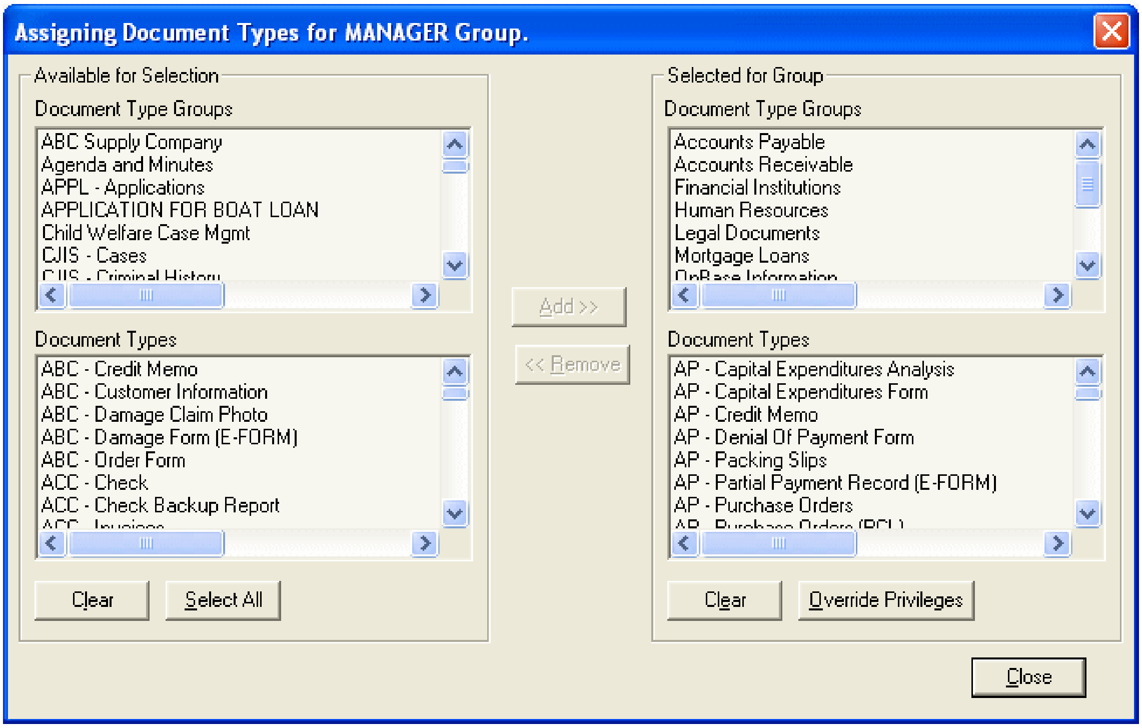
When the import is completed, exit out of the Configuration module before completing the installation steps.

# Configure User Group Rights for Imported Workflow Document Types

1. In the Configuration module, choose **Users | User Groups / Rights** at the menu bar to display the **User Groups & Rights** dialog box.



2. Highlight the User Group Name(s) for customer service users that will utilize the workflow and click the **Document Types** button. The **Assigning Document Types for User Group Name Group** dialog will appear.



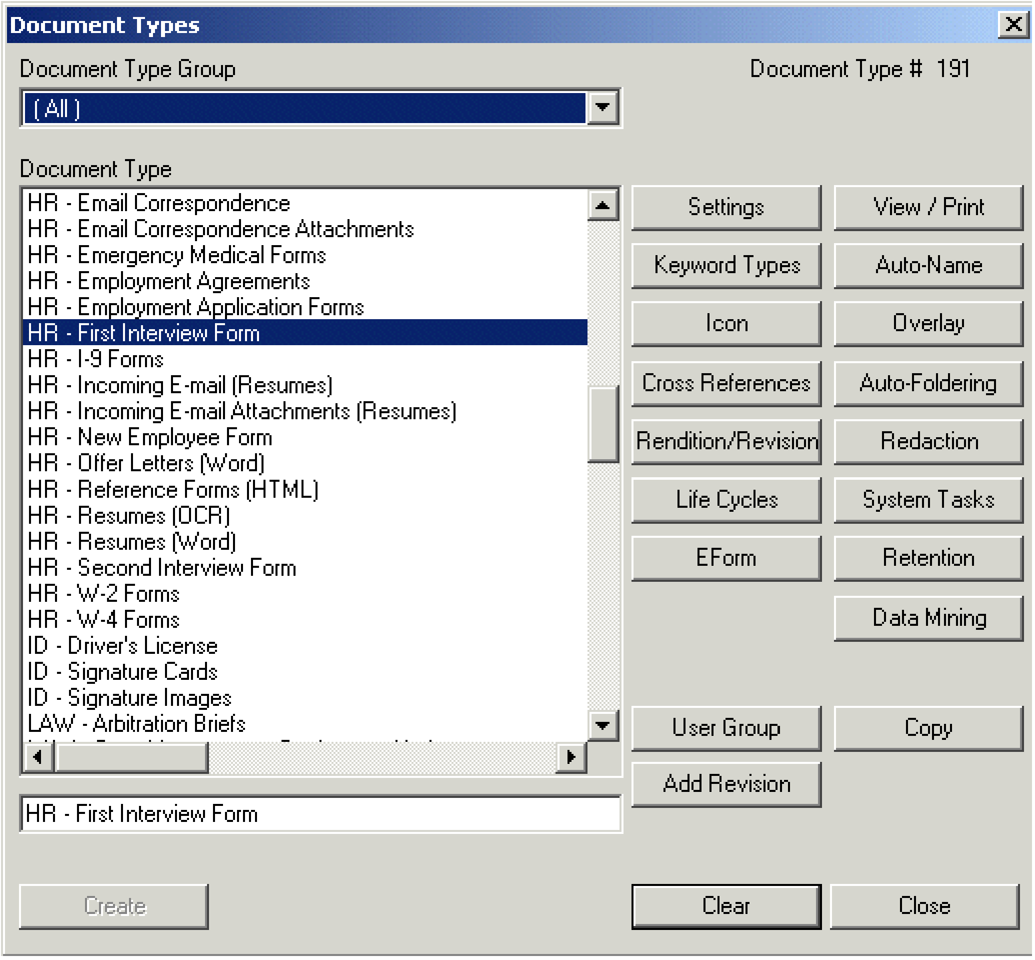

3. In the **Available for Selection** section of the dialog box, choose Document Distribution **Group** under the **Document Type Groups** heading and click the **Select** button.

   When the **Document Distribution Group** is chosen all the document types (**Distribution Record**, **Notification Not Yet Viewed Record**, and **Produced CD Record**) used within the Document Distribution Workflow will automatically be chosen.

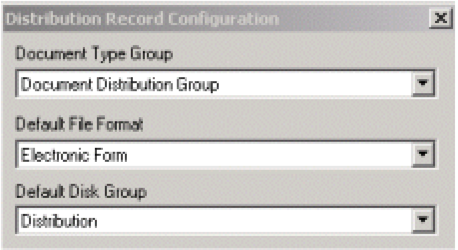
4. Select **Close**, then **Exit**.

# Configure Default Disk Groups for Imported Document Types

In the Configuration module, choose **Document | Document Types** at the menu bar. The **Document Types** dialog box is displayed.

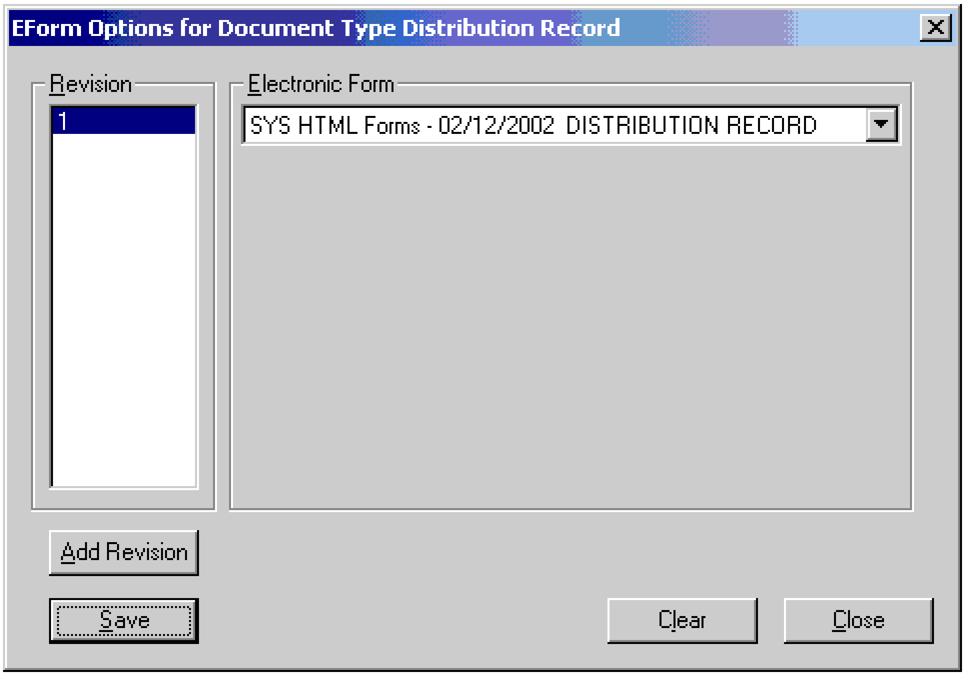



1. Choose **Distribution Record** from the **Document Type** list. Select the **Settings** button and the **Distribution Record Configuration** dialog box will appear.

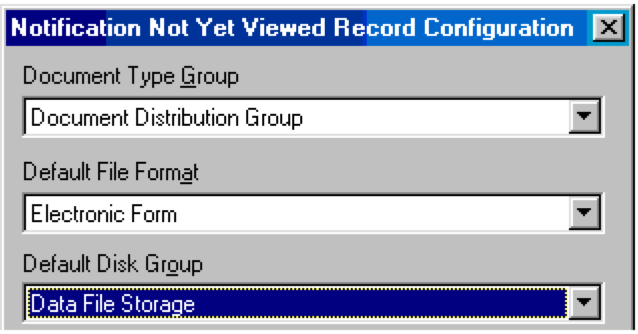



2. Choose a default disk group from the **Default Disk Group** list. Select **Save & Close**.

3. Click the **E-Form** button for the **Distribution Record** document type.

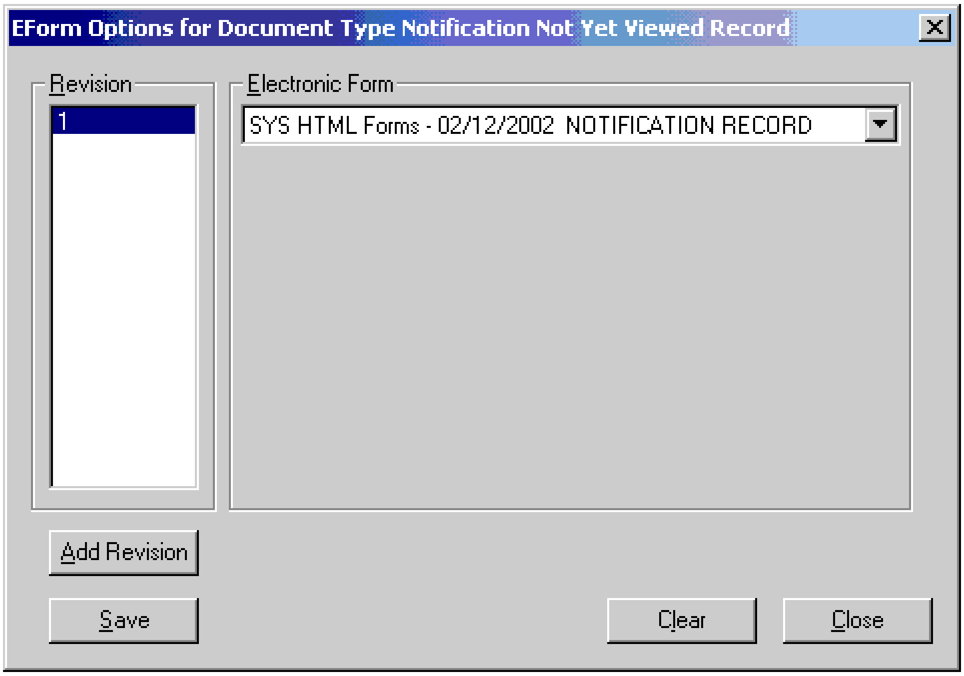



4. At the **Electronic Form** drop-down list, select the form named **SYS – HTML Forms Distribution Record**. Choose **Save**, then **Close**.
5. Select the **Notification Not Yet Viewed Record** document type in the **Document Types** dialog box. Click **Settings** and the **Notification Not Yet Viewed Record Configuration** dialog box will appear.



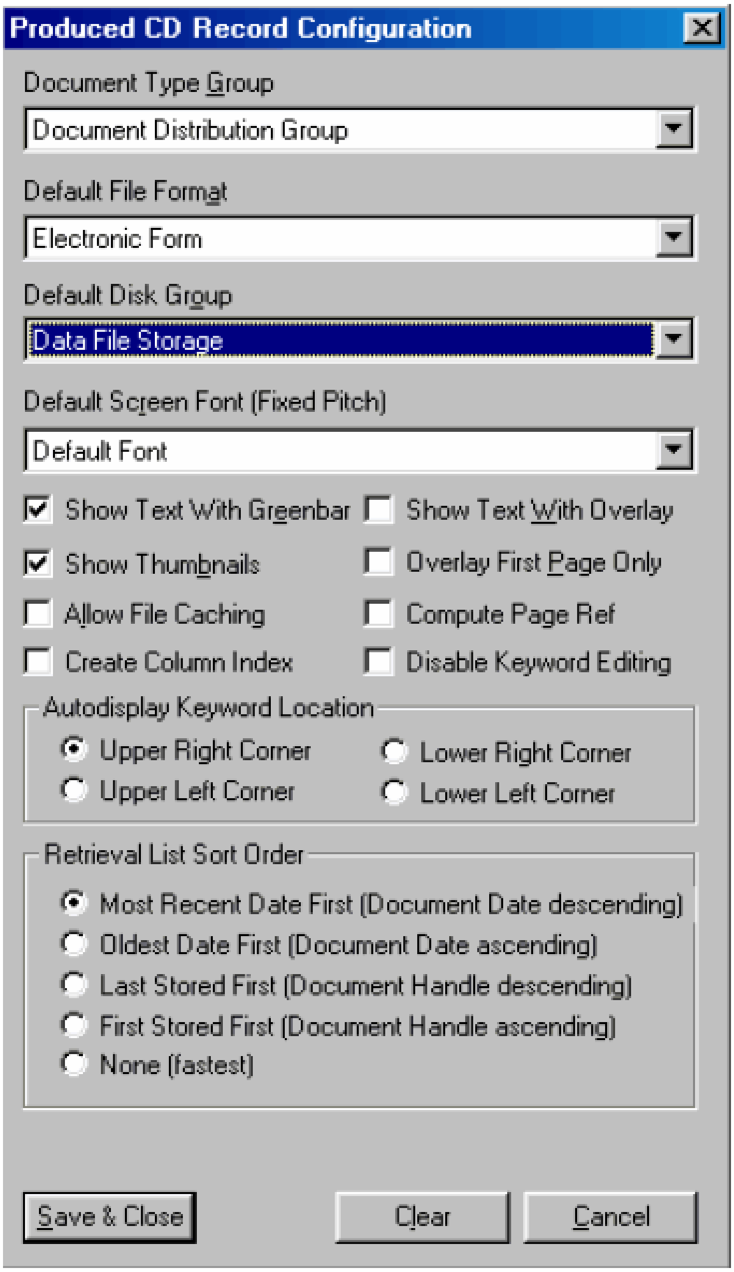

6. Choose a default disk group from the **Default Disk Group** list. Select **Save**, then **Close**.

7. Select the **E-Form** option for the **Notification Not Yet Viewed Record** document type.



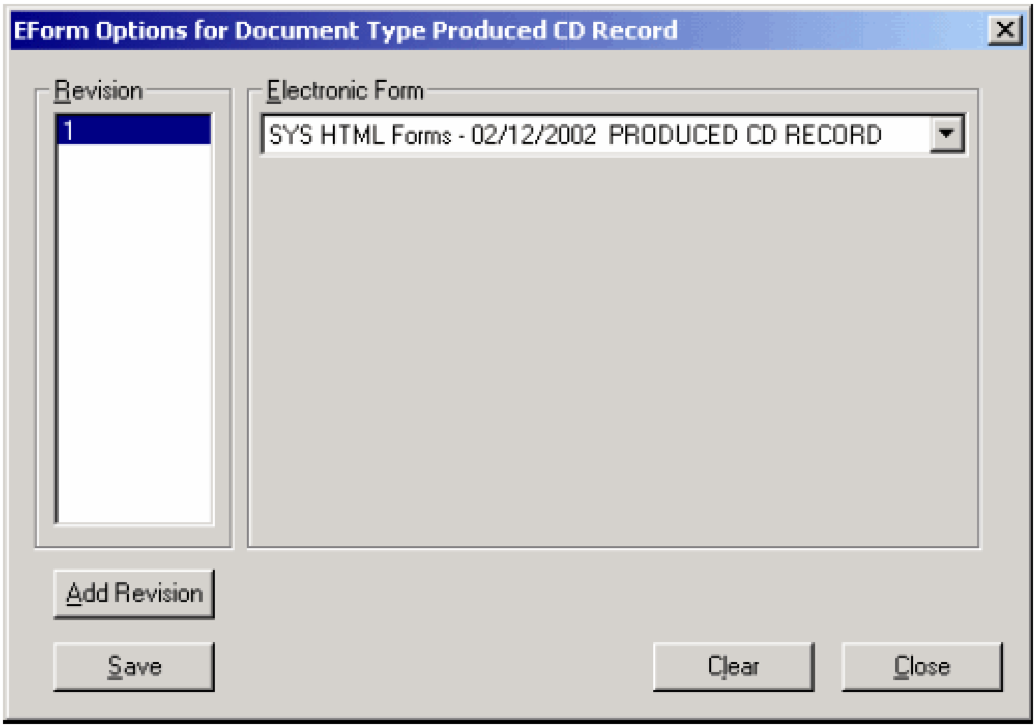

8. At the **Electronic Form** drop-down list, select the form named **SYS – HTML Forms Notification Not Yet Viewed Record**. Choose **Save**, then **Close**.

9. Choose the **Produced CD Record** document type in the **Document Types** dialog box. Click the **Settings** button. The **Produced CD Record Configuration** dialog box will appear.



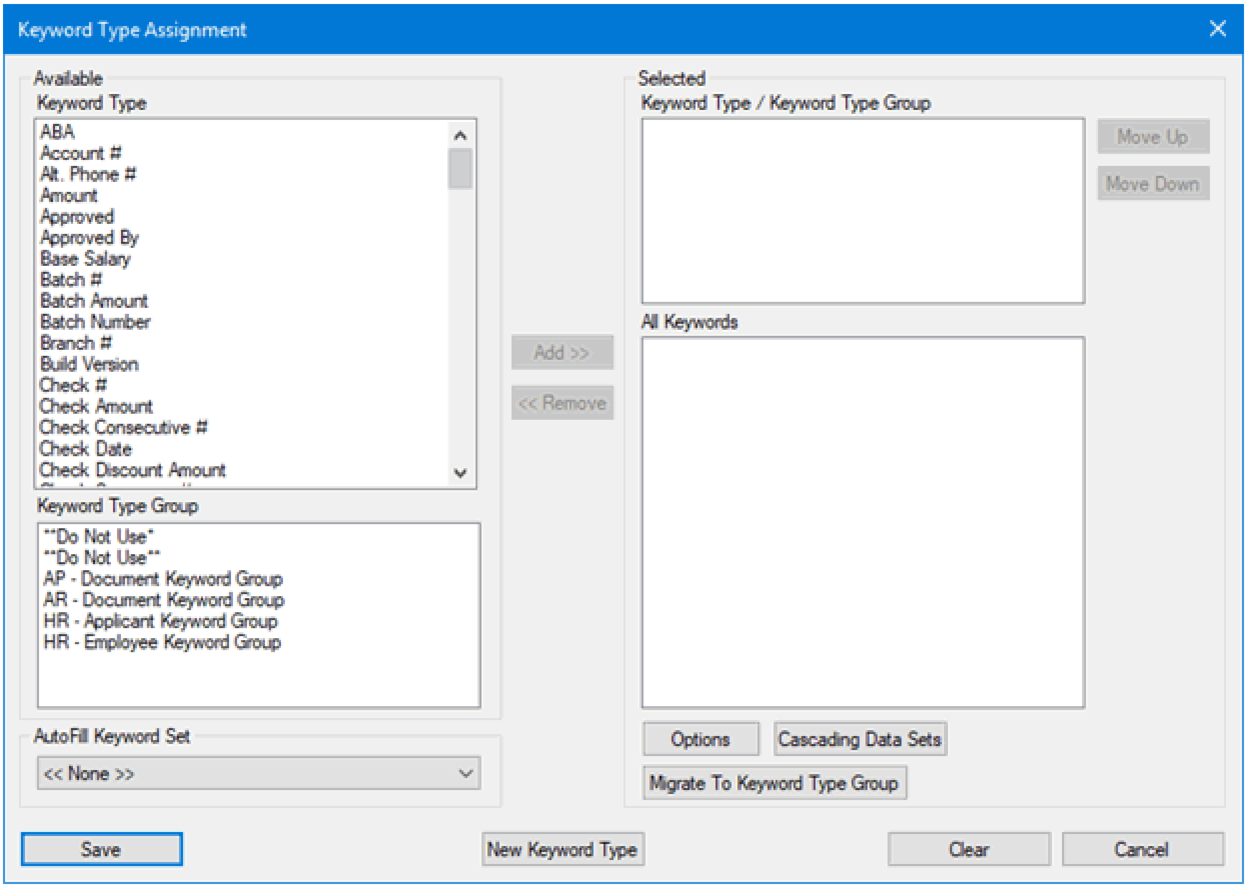

10. Choose a default disk group from the **Default Disk Group** list. Click **Save & Close**.

11. Select the **E-Form** option for the **Produced CD Record**.



12. At the **Electronic Form** drop-down list, select the form named **SYS – HTML Forms Produced CD Record**. Choose **Save**, then **Close**.

    If you will be distributing notifications to inform customers that their statements are ready for download from a designated area, such as a web site, you have the option to track whether or not the document has been viewed or not. The **View Status** Keyword Type can be added to the document type that you have defined for the completed rendered statement.
13. Choose the Document Type that you have defined for the completed rendered statement in the **Document Types** dialog box.
14. Select the **Keyword Types** button to display the **Keyword Type Assignment** dialog box.



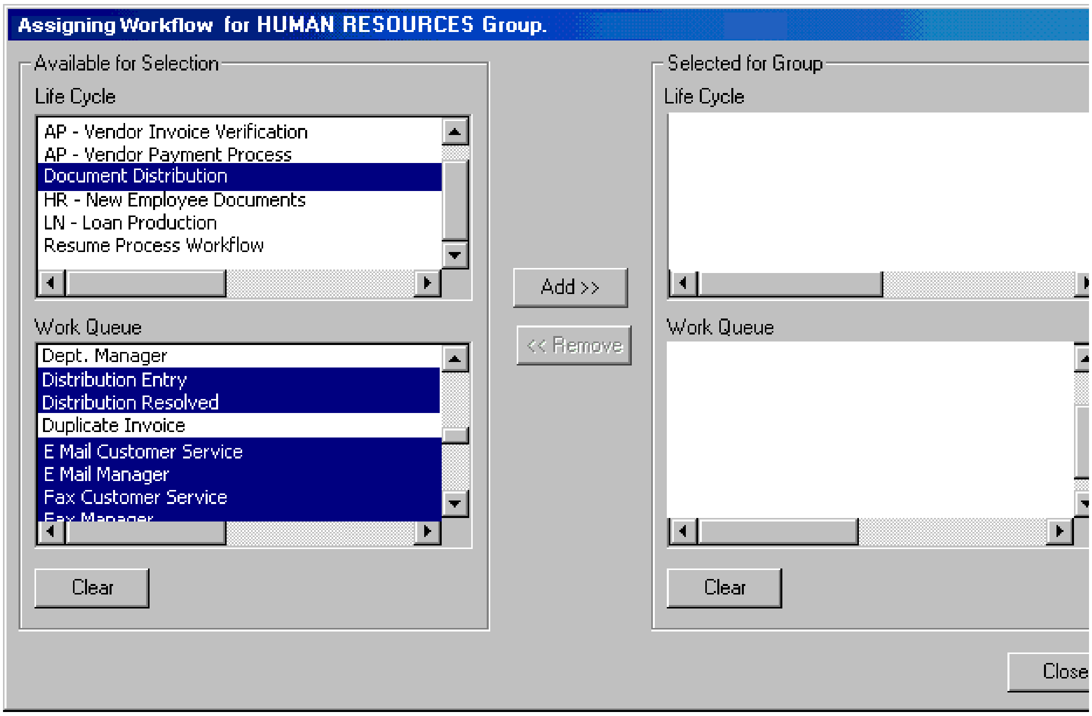

15. In the **Available** section of the dialog box, select the **View Status** Keyword Type.
16. Click **Add >>** to add the **View Status** Keyword Type to the **Selected** section of the dialog box.

17. Select **Save**.

**Note:** When implementing your method for setting this keyword to indicate that the rendered statement is viewed (API or VB Script) set the keyword value to **1**. This indicates to the system that the rendered statement has been viewed. If a value is not set or is set to **0** then it indicates that the document has not yet been viewed. The Email distribution server will set the value to **0** if no value has been set on the document and the first iteration of Notification checking has occurred on the document.

# Grant Rights to the Document Distribution Life Cycle and Work Queues

1. In the Configuration module, choose **Users | User Groups & Rights** at the menu bar, The **User Groups & Rights** dialog box is displayed.
2. Highlight the user group and select **Workflow**.




3. Select **Document Distribution** from the **Life Cycle** list that in the **Available for Selection** section. The associated work queues becomes highlighted in the **Work Queue** list.
4. Click **Add** to assign the Document Distribution life cycle and the associated work queues to the user group.
5. Click **Save & Close**.

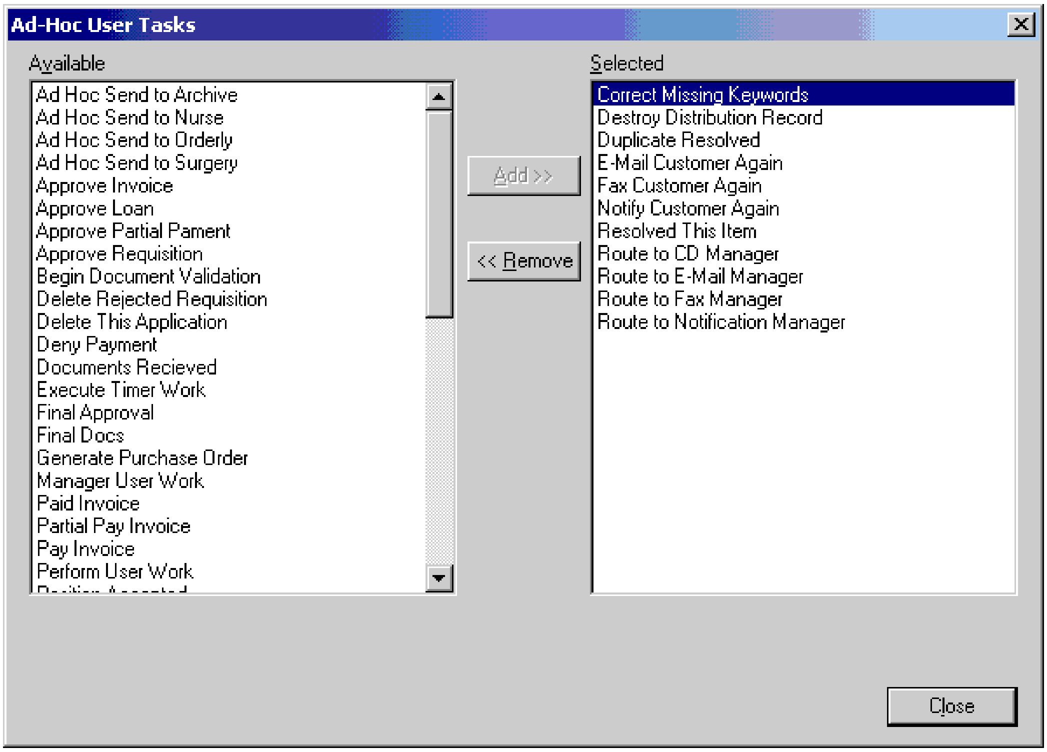
   Specifically, the following work queues are assigned as part of the Document Distribution life cycle:

   - **CD Customer Service**
   - **Distribution Entry**

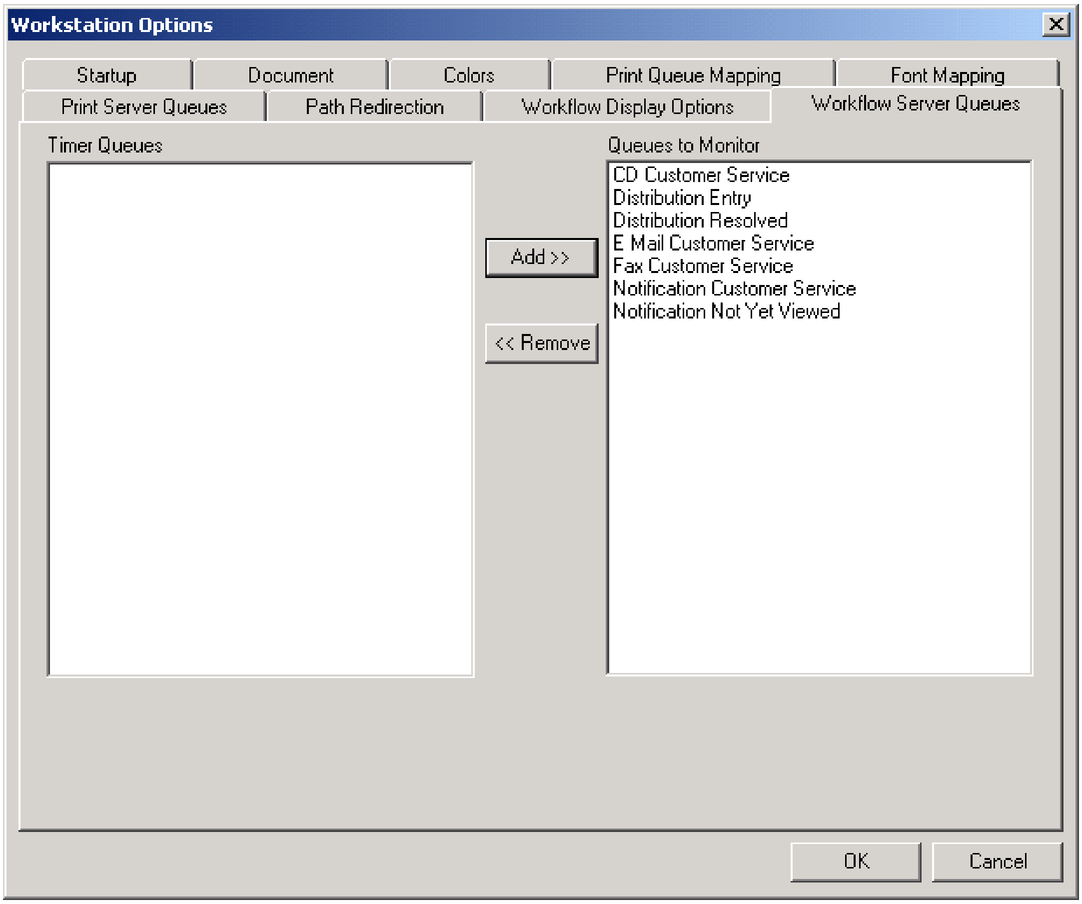
- **Distribution Resolved**
- **Email Customer Service**
- **Fax Customer Service**
- **Notification Customer Service**
- **Notification Not Yet Viewed**
- **Notification Manager**
- **Email Manager**
- **Fax Manager**
- **CD Manager**
- **Resubmitted For Distribution**

6. In the Configuration module, choose **Users | User Groups & Rights** at the menu bar. The **User Groups & Rights** dialog box is displayed.
7. Highlight the user group and select **Ad-Hoc User Tasks**.
8. Select the following tasks, click **Add**, then **Save & Close**.
    - **Correct Missing Keywords**
    - **Destroy Distribution Record**
    - **Duplicate Resolved**
    - **Email Customer Again**
    - **Fax Customer Again**
    - **Notify Customer Again**
    - **Resolved This Item**
    - **Route to CD Manager**
    - **Route to Email Manager**

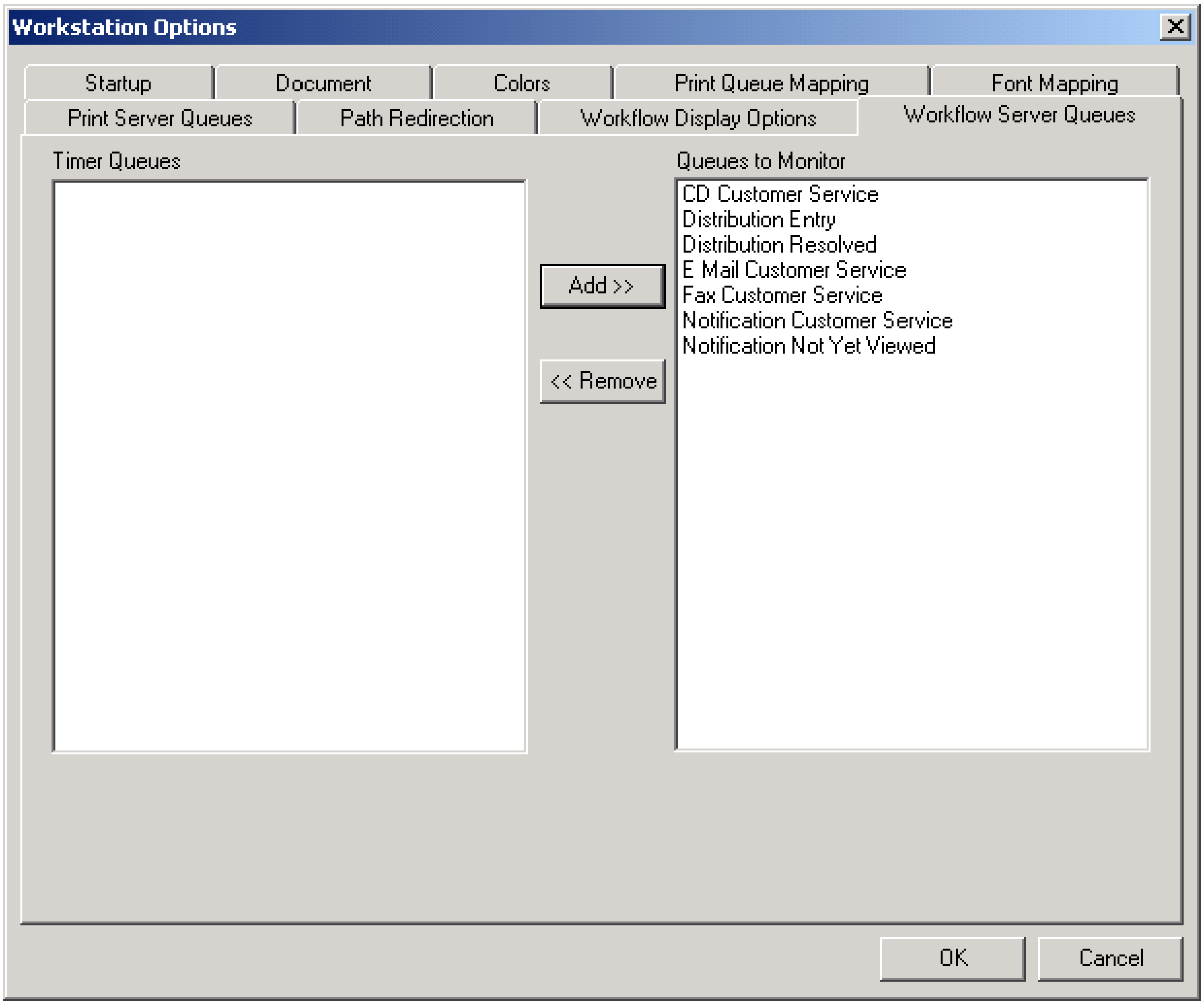
- **Route to Fax Manager**
- **Route to Notification Manager**



9. In the OnBase Client on the workstation that will service the Workflow timers, choose **User | Workstations Options** at the menu bar. The **Workstation Options** dialog box is displayed.



10. Select the **Workflow Server Queues** tab.




11. Choose the following from the **Timer Queues** select list, (choosing **<<Add** after each):
    - **CD Customer Service**
    - **Distribution Entry**
    - **Distribution Resolved**
    - **E Mail Customer Service**
    - **Fax Customer Service**

- **Notification Customer Service**
- **Notification Not Yet Viewed**

These timers control:

- The migration of documents from the Entry Queue.
- The movement of documents from the Customer Service Queues to the Manager Queues after 4 hours.
- The removal of documents from the Workflow after 7 days.

12. Select **OK**.

# Command Line and .ini Switches

Depending on the distribution method being used, the following switches must be applied to the OnBase Client desktop icon, in order to enable the workstation as a distribution server:

- **-STMTMAILSRVR** (email distribution)
- **-STMTFAXSRVR** (fax distribution)
- **-AUTOWRITECD** (CD distribution)

## INI File

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

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

### Location

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

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

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

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

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

### INI Considerations in a Citrix and Microsoft Windows Remote Desktop Environment

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

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

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

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

### Editing the INI File

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

## Backup/Recovery

All configuration for Document Distribution is stored in the Database. A complete restore of a current backup will recover all Document Distribution Settings.

Document Distribution Workstations will need to have the proper 3$^{rd}$ Party Applications restored if the WorkStation is destroyed and/or replaced.

- If using Document Distribution CD Publishing, reinstall Publishing files.
- If using Document Distribution Fax Server, reinstall WinFaxPro Integration files.

# Troubleshooting

**Issue**

The following error is received when launching the OnBase Client with the **-STMTMAILSRVR** switch is applied: **The profile name you have entered is not valid or contains characters which are not supported in your current Windows system codepage. Please enter a different profile name.**

**Resolution**

Complete the following steps:

1. In the Configuration module, select **User Names / Passwords**.
2. Select the user that you are having problems with.
3. Click **SMTP Mail**. The **SMTP Mail Settings** dialog box is displayed.
4. If there is data in the fields within the dialog box, clear out the data.
5. Click **Save**.

**Issue**

When using multiple clients to distribute documents, job numbers may become out of sync.

**Resolution**

Complete the following steps:

1. In the Configuration module, click **Utils | Update Distribution Max Num Keys**.
2. A **Success** dialog will be shown stating that the **Distribution History Max Num Key has been updated**. Click **OK**.

This problem is often caused due to using multiple versions of OnBase to distribute documents.

**Issue**

Some items in the Document Distribution Queue are not shown despite having Document Distribution administrative privileges.

**Resolution**

If security keywords are configured on documents, ensure that the database settings are correct. The **Perform security keyword checking during database query** option should be selected in the Configuration module. Leaving this option unchecked may hide documents with security keywords from view.

**Issue**

The OnBase Client stops working when customer information is imported through the Customer Import Processor.

**Resolution**

When importing customers, ensure you configured at least one action (for example, **>>Add Customer** or **>>Modify Customer**) in the **Customer Importer Field Configuration** dialog box that corresponds to the correct field order in the index file.

For example, the following information is included in the index file to be imported: "**Cindy Smith","1234","123 Main Street","Anytown OH 11111","Add","CD","CD Copies**"

In this index file example, the field "**Add**" indicates the **>>Add Customer** action must be added to the field configuration and in the order in which it is organized in the index file.

**Note:** You do not need to use the term "**Add**" in the index file to indicate the **>>Add Customer** action. Any term or number can be used to indicate any action field.

Following this example index file, the **Customer Importer Field Configuration** dialog box contains the fields in the following order:

| Order | Keyword Type |
|---|---|
| **1** | >>Customer Name |
| **2** | >>Customer Unique ID |
| **3** | >>Address 1 |
| **4** | >>Address 2 |
| **5** | >>Add Customer |
| **6** | >>Distribute as CD |
| **7** | >>Number of CD Copies |

For more information on configuring a customer information import process, see Customer Importer Processor on page 97.

# 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.

# Document Distribution

## Administration Guide

Foundation EP5

# Configuration

## Overview

The Document Distribution module manages delivery of statements rendered through the Image Statements module or the ad hoc distribution of document not associated with image statements. A Document Distribution process is configured to direct the delivery of the statements/documents to the intended recipients.

When using Image Statements in conjunction with Document Distribution, the following configuration information assumes that the Image Statements have been correctly configured for the Document Distribution process. For more information on Image Statements, please consult the Image Statements Module Reference Guide or Help file.

## User Groups and Rights

Performing Document Distribution requires product rights, configuration rights, and privileges granted through the **User Groups & Rights** dialog box. Special rights are required for documents distributed via CD and DVD.

### Configuration Rights

In order to be able to configure fax configuration, the user group, to which the user belongs, must be granted to **Output Configuration** right. For more information, see the User Group Configuration for Configuration Rights topic in the Configuration module's documentation.

To assign product rights:

1. Within the Configuration module, select **User | User Groups & Rights** to display the **User Groups & Rights** dialog box.
2. Type the new user group name in the field or highlight an existing one from the User Group Name list and click the **Product Rights** button.
3. On the **Assigning Product Rights for [group name] Group** dialog box, select **Document Distribution** option in the **Administrative Privileges** section of the dialog box. This allows for all Document Distribution dialog windows (Delivery Template, etc.) to be available for the user in the OnBase Client. This also enables access to the Customer Information dialog box from the **Admin** menu in the OnBase Client or from within **Administration** in the Unity Client **File** menu.
4. Click **Save**.

To assign privileges:

1. Within the Configuration module, select **User | User Groups & Rights** to display the **User Groups & Rights** dialog box.
2. Type the new user group name in the field or highlight an existing one from the User Group Name list and click the **Privileges** button to display the **Assigning User Group Privileges for [user group]** dialog box.
3. Select the **Customer Information** option in the **Client Based Products** section of the dialog box. This allows for a user to have access to all Customer Information for Document Distribution.

**Note:** In order to create Distribution Recipients in the Web Client, the **Customer Information** privilege must be granted. Granting the **Document Distribution** Administrative privilege will not grant access to this in the Web Client.

4. Click **Save**.

### Privilege for Ad Hoc Document Distribution

If you want to grant a user rights to run distribution process on documents that are not associated with the Image Statements module, you must grant the **Document Distribution** Client Based Products privilege. To grant this privilege:

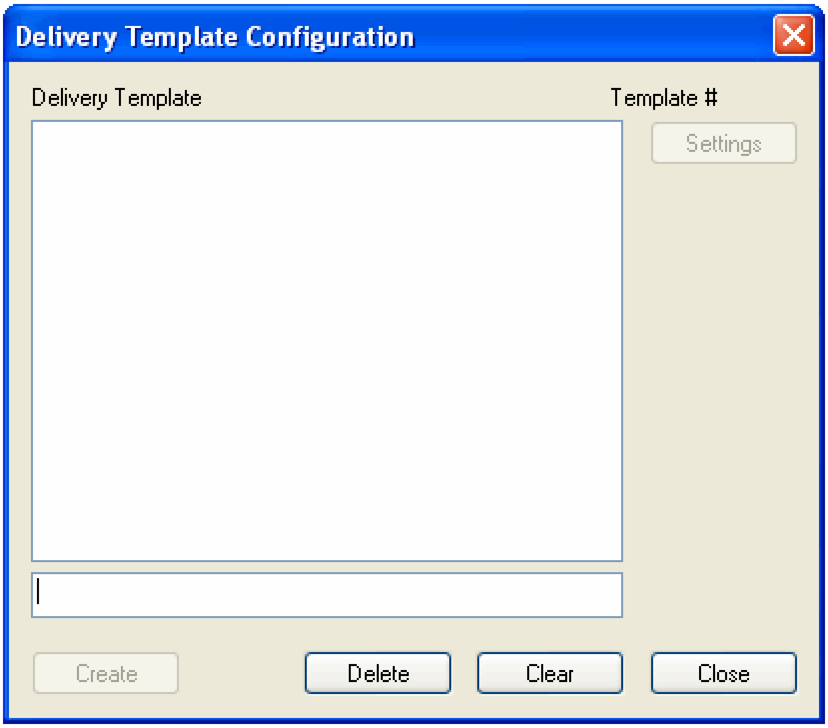
1. Within the Configuration module, select **User | User Groups & Rights** to display the **User Groups & Rights** dialog box.
2. Type the new user group name in the field or highlight an existing one from the User Group Name list and click the **Privileges** button to display the **Assigning User Group Privileges for [user group]** dialog box.
3. Select the **Document Distribution** option in the **Client Based Products** section of the dialog box.

## Configuring a Delivery Template

Delivery Templates are the cover pages for faxes or the body of the email for notifications and emails with attachments. Static text as well as variable data fields can be configured for the Delivery Template.

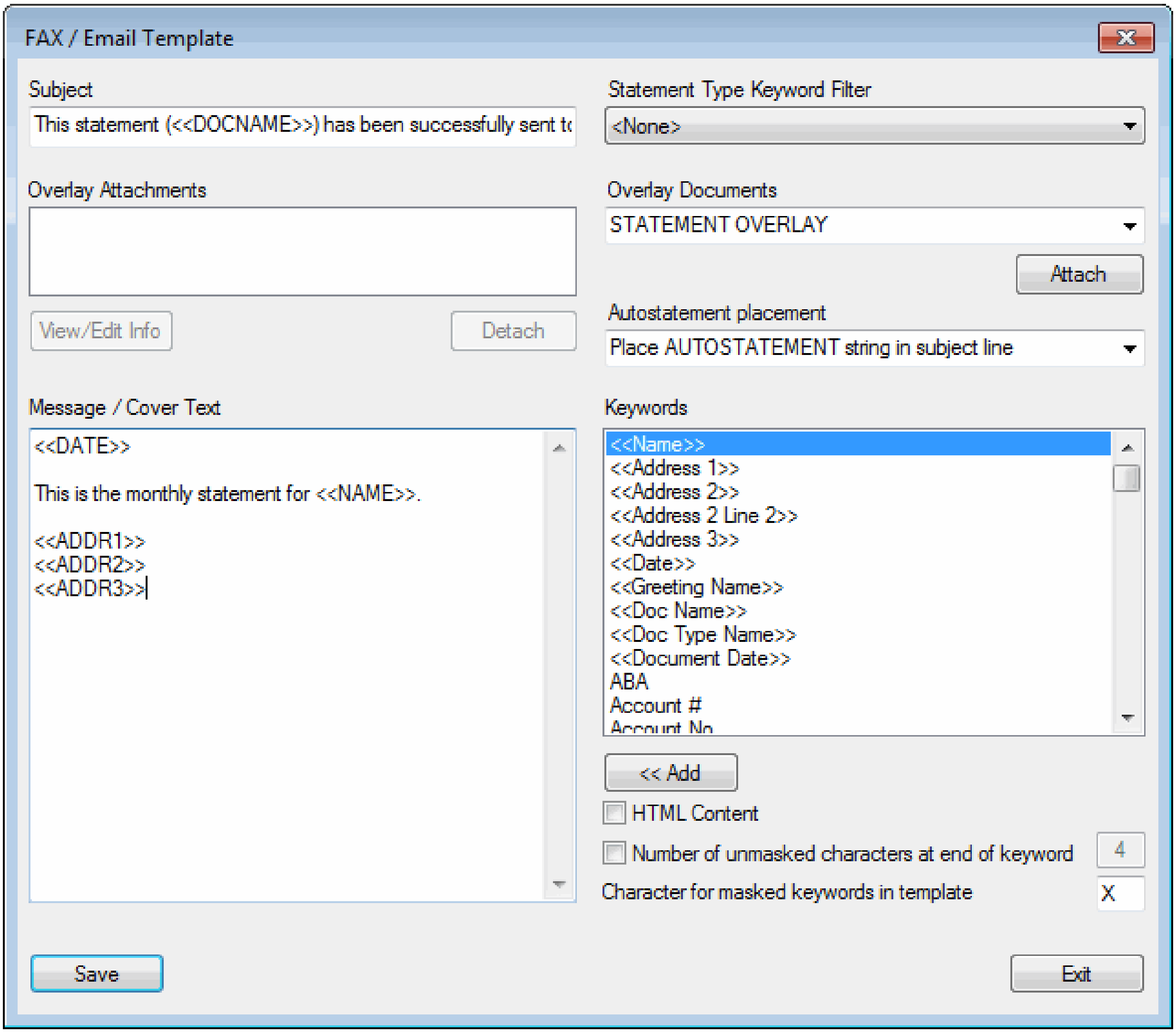
## Delivery Template Settings

1. In the OnBase Client, select **Admin | Document Distribution | Delivery Template** at the menu bar. The **Delivery Template Configuration** dialog box is displayed.




2. Enter a Delivery Template name into the field below the **Delivery Template** list and select **Create,** or highlight an existing Delivery Template.

3. Click **Settings** to access **Fax / Email Template** dialog box.




Any characters entered in the **Subject** field will be reflected in the subject line in the e-mail or fax that is distributed. Any characters entered in the **Message/Cover** text field will appear in the body of the email or fax that is distributed.

To automate and customize the creation of the template, field tags and keyword types can be incorporated on the Delivery Template.

Field tags represent generic data present in all distributed documents that can also be referenced in the cover letter. The following field tags are available for use:

| Field Tag | Description |
|---|---|
| **<<Name>>** | Pulls the entry for **Recipient Name** (**Customer Information** dialog box) and substitutes it in place of this field tag in the cover letter. |

| Field Tag | Description |
|---|---|
| **<<Address 1>>**<br>**<<Address 2>>**<br>**<<Address 2 Line 2>>**<br>**<<Address 3>>** | Pulls the address information supplied for CD Distribution (**Customer Information** dialog box) and substitutes it for these field tags in the cover letter. |
| **<<Date>>** | Substitutes the document creation date of the batch of distributed documents for this field tag in the cover letter. |
| **<<Greeting Name>>** | Pulls the entry from the **Customer Greeting Name** field (**Customer Information** dialog box) and substitutes it in place of this field tag in the cover letter. |
| **<<Doc Name>>** | Pulls the autoname string of the primary document being distributed into the message. |
| **<<Doc Type Name>>** | Pulls the Document Type of the document being distributed into the message. |
| **<<Document Date>>** | Pulls the Document Date of the document being distributed into the message. |

All keyword types configured in the database are available for selection, but only those keywords found on the primary document type will be incorporated into the Delivery Template message. The default keywords display at the top of the list, and all keyword types in the database are then listed in alphabetical order. Multiple keywords types can be selected, as well as multiple instances of the same keyword type (e.g., multiple account numbers).

**Note:** If multiple instances of the same keyword type are configured, but not used in the distribution, they will not appear on the Delivery Template. Likewise, any configured keyword type that is not used in the distribution will not appear on the Delivery Template.

4. If you want to mask keyword values, select the **Number of unmasked characters at end of keyword** option. In order to mask keyword values you must use the tag <KM#_##> where # is the number of characters left unmasked and _## is the Keyword Type number. When a Keyword Type is selected with this option selected, the tag will be automatically formatted when **>>Add** is clicked. The field to enter the number of characters that should be left unmasked is read-only until the check box is selected. Enter the number of characters that should be left unmasked. The default value is 4. The unmasked character(s) will be the specified number of characters from the end of the value (right to left). The characters will be replaced with the X character. For example, if you mask the all but the last 4 characters of a keyword value that is 123456789, the displayed value would be XXXXX6789.

---

**Note:** When using keywords configured with a mask at the Keyword Type level, the following characters will not be masked: static characters, + (plus sign), - (minus sign), * (asterisk), . (period).

---

Specify the character you want to use for masking in the **Character for masked keywords in template** field. The **X** character is specified by default.

---

**Note:** It is recommended that you test the character selected for masking to ensure that delivery results are acceptable before implementation. This is especially true when using a special character for masking.

---

5. In the **Subject** field type the name of the email or fax cover sheet subject. This field can contain up to 254 characters.
6. Select a statement type from the **Statement Type Keyword Filter** drop-down menu to filter the keywords displayed. This will display only the keywords that are assigned to the primary document of the statement type that is selected.
7. You can add up to 3 overlay attachments to the message. To add an overlay attachment, select the overlay from the **Overlay Documents** drop-down list and click **Attach**. Enter the **Attachment Name** in the **Attachment Information**. Select **Use Native File Format** to send the attachment in its native format. If the native format is not selected, the attachment will be in the PDF format.
8. In the **Autostatement placement** drop-down list, you can specify where the **AUTOSTATEMENT** string will be placed. There are four options:
   - **Place AUTOSTATEMENT string in subject line**: Places the AUTOSTATEMENT string in the subject line of the message.
   - **Place AUTOSTATEMENT string in message body**: Places the AUTOSTATEMENT string in the body of the message.
   - **Hide AUTOSTATEMENT string in message body**: This option requires the **HTML Content** option to be selected. This option includes the AUTOSTATEMENT string in the message body, but it is not displayed in the message, using HTML to hide the string.

- **Disable AUTOSTATEMENT string**: Disables the AUTOSTATEMENT string and does not include the string within the subject or body of the message.

**Caution:** If the AUTOSTATEMENT string is disabled, the bounce back settings that are configured in the **Distribution Server Configuration** dialog box will not identify failed messages from Document Distribution using the selected delivery template.

9. In the **Message / Cover Text** field type the email or fax text. The customer name, address lines and date may be encoded by highlighting the corresponding field on the right and selecting the **<<Add** button. You can include URLs and email links in your text. Since this will be the body of the email that is distributed, the text will present itself properly in the recipient's email client software. This field can contain up to 30,000 characters.
10. If you want the message to be sent using HTML, select the **HTML Content** check box. Otherwise, the message will be sent in plain text.
11. Select **Save**.
12. Select **Close**.

# Configuring Distribution Sites

Distribution sites allow the user to create and configure workstation sites. Configured sites can be tied to a class of service or recipient.

To configure a site:

1. In the Configuration module, select **Printing | Document Distribution | Document Distribution Sites**. The **Document Distribution Sites** dialog box is displayed.
2. Enter the name of the site in field at the bottom of the dialog.
3. Click **Create**. The **Auto-Publishing Site** dialog box is displayed.
4. Enter a unique name for the site in the **Site Location** field. This is the user friendly name that is used to configure the sites a workstation processes jobs for and to define a site for a scheduled job.
5. Click **Save**.

## Renaming a Distribution Site

In some cases, you may want to assign a new name to a distribution site. To rename a distribution site:

1. In the **Document Distribution Sites** dialog box, double-click on the site you want to rename. The **Rename Document Distribution Site Dialog** dialog box is displayed.
2. Enter the name in the **New Name** field.
3. Click **Save**.

# Configuring a Document Distribution Process

A distribution process identifies keywords that are available during Document Distribution for matching with rendered documents, as well as any class of service distribution parameters.

To configure a distribution process:

1. In the Configuration module, select **Printing | Document Distribution | Distribution Process** to display the **Distribution Process** dialog box.
2. Enter a Distribution Process name in the field below the **Distribution Process** list and select **Create**, or choose an existing Distribution Process.

## Settings

1. Click **Settings** to display the **Distribution Process Settings** dialog box.

   Select the **Default Process** check box if you are going to have more than one distribution process and you want to set one as the default. The default choice automatically appears in all Client dialogs that require you to enter a Distribution Process.

   If the **Uses Class of Service** check box is selected, a comparison of keyword values is performed between the rendered documents and the Document Types assigned to that class of service. If a match is made between keyword values, documents are sent (on a Document Type basis) to the associated recipient, according to the distribution method configured for the Document Type. When this checkbox is selected, the process will be called a Class of Service. When this checkbox is not selected, the process is known as a Distribution Process.

**Note:** The **Use Doc Type name for Attachment names** option is not supported for use with Document Distribution.

2. Select **OK**.

## Customer ID Keywords

1. Click the **Customer ID Keywords** button to display the **Process Customer ID Keywords** dialog box. Select keywords to match rendered documents to the distribution process at this dialog box. To add a keyword, select the keyword type in the left side of the dialog box and click **Add>>**. The keyword type appears on the right. If multiple keyword types are added, the **Move Up** and **Move Down** buttons can be used to sequence the keywords. Use **<<Remove** to remove the keywords from the distribution process.

**Note:** If more than one Customer ID Keyword is configured, any intended recipients of that Distribution Process/Class of Service must have matching keyword values configured in their Customer Information for all the Customer ID keywords in order to receive rendered documents. Also, if multiple recipients have keyword values matching a rendered statement, each recipient receives a copy of the statement.

2. You can configure a Customer ID Keyword to display in the **Customer Information** dialog box in the OnBase or Unity Client. Click **Display**. Select the Keyword Type from the drop-down list that you would like displayed and click **OK**. The selected Keyword Type will be a display column in the **Customer Information** dialog box.

   When you do not select a Keyword Type in the **Display Keyword** dialog box, if a recipient has multiple customer ID keyword values associated with it, only one instance of a recipient is displayed in the **Customer Information** dialog box. Upon selecting a recipient with multiple customer ID keyword values, the user will be prompted to select the instance of the recipient to access. When a Keyword Type is selected from the **Display Keyword** dialog box, every value for the ID keyword selected will be displayed in the **Customer Information** dialog box. In this case, some recipients will be displayed multiple times if they are associated with multiple ID keyword values.
3. Click **Close**.

## Class of Service

**Note:** If **Use Class of Service** is not selected, **Class of Service** is not available at the **Distribution Process** dialog box.

**Note:** If the distribution process does not have the **Send to Printer** option selected, ensure the user account that will be performing the rendering process has print job deletion rights to avoid printing the statements to a physical printer. This not configured in OnBase. It should be configured at the network level.

1. Click **Class of Service** to access the **Distribution Process Settings (Class of Service)** dialog box. Class of Service allows the distribution method to be specified for a group of recipients.
2. First select the appropriate **Institution Name**, then enter a Class of Service label in the field below the **Class Of Services** list and select **Create**.
3. Click the **Settings** button to display the **Class of Service (Default Distribution Settings)** dialog box.

## Default Distribution Options

| Distribution Option | Description |
|---|---|
| **Email Notification** | Enabling this check box directs the system to send a plain text message to the email address of the recipient identified by the Distribution Process configuration. The message contains a link to a designated web site where the distributed documents can be viewed by the recipient.<br><br>**Note:** Email distribution can use the Hyland Distribution Service by enabling the **Use Email Distribution Service for Document Distribution** option. If the Distribution Service is used, a temporary file cache must be created and a default sender email address must be configured. For more information about the Hyland Distribution Service, see Configuring the Distribution Service on page 152. |

| Distribution Option | Description |
|---|---|
| **Email Distribution** | **Note:** The **Email Distribution** option can use the Hyland Distribution Service by enabling the **Use Email Distribution Service for Document Distribution** option. If the Distribution Service is used, a temporary file cache must be created and a default sender email address must be configured. For more information about the Hyland Distribution Service, see Configuring the Distribution Service on page 152.<br><br>Sends an email attachment of the rendered statements to the email address of the recipient identified by the distribution process configuration. When selected, the statements are sent in one of the following formats:<br>• **RTF**<br><br>**Note:** Selecting **RTF** significantly increases the size of the attachment file as compared to the other options. If the generated attachment is larger than the file size limit configured for your email server, the email message is not sent.<br><br>• **Native Format**<br>• **PDF**<br>• **40 bit RC4 Encrypted PDF**<br>• **128 bit RC4 Encrypted PDF**<br>• **128 bit AES Encrypted PDF (**requires Adobe Acrobat 7 or higher)<br><br>**Note:** Depending on your configuration, you may not see all these options.<br><br>The PDFplug.dll file is required to distribute PDFs as encrypted. Enter a value in the **Password** field when distributing by encrypted PDFs. See the information about the Password field in step 7.<br><br>**Note:** Depending on the file format of a document, the document may not be converted to the specified format when distributed. While image documents are converted to any specified format, text documents are not. PDF documents are converted to any encrypted PDF format but they are not converted to image or RTF formats.<br><br>**Note:** Due to scalability issues, Rich Text statements in Microsoft Word may not render correctly. |

| Distribution Option | Description |
|---|---|
| **Published CD Distribution** | The rendered statement will be distributed to the customer as a published CD.<br>**Include All Deposit Items with Deposit** option is designed for check processing sites. Based on Document Type configuration, deposit slip and deposit check images will be included with secondary documents and the completed rendered statements on the published CD.<br>**Note:** If a recipient does not have an address included with his or her information, a CD will not be created and a form will be sent to the Document Distribution Workflow for manual correction. Also, information pertaining to the failed CD creation will be added to the SYS Verification Report for the job during which CD creation failed.<br>• If you select **Replace User Account Passwords**, for each recipient, you will be able to override the standard password per recipient in the **Password** field during recipient creation. |
| **Send to Printer** | The rendered statement will be printed for distribution to the customer.<br>Select the **Only Print Primary Documents** option to print only the primary documents in a configured statement. Both primary and secondary documents can still be distributed according to the desired distribution process, but only the primary documents will be printed.<br>**Note:** If any reconciliation pages or enclosures have been configured, they will be archived with the secondary documents.<br>**Note:** When OMR marks are configured correctly for a statement type, every statement that prints will contain the OMR marks regardless of whether the statement type uses separate jobs for printing and archiving. If the statement type uses separate jobs for printing and archiving, archived images that are electronically distributed will not contain the OMR marks. |
| **External Distribution** | This option should be selected when the statement is distributed outside of the OnBase system by a third party method. This option allows OnBase to recognize the statement has been distributed through another process. |
| **Fax Distribution** | The rendered statement will be distributed to the customer as a fax. |
| **Fax and/or Email Cover Sheet** | Choose the appropriate cover sheet defined in the **Delivery Template Configuration** dialog. |

| Distribution Option | Description |
|---|---|
| **Alias Statement Type** | This the alternative Statement Type to be used with the Class of Service. |
| **Distribution Site** | Select the site for which you want the class of service to be associated with. |

### Statement Composition Options

| Option | Description |
|---|---|
| **Statement Format** | Links a distribution process to a specific statement layout file configured with the Statement Composition module. |
| **Class of Service Identifier** | Identifies the text string, as found in the process file, from the field identified as the Class of Service indicator. |

### Specific Document Type Distribution Options

1. **Specific Document Type Distribution Options** allows other documents to be distributed to recipients within other Classes of Service.
2. Highlight the appropriate document types from left pane and select **Add**.
3. Select **Settings** to display the Class of Service dialog box. The Default Distribution Options are explained in the table Default Distribution Options.
4. When finished, select **Save & Close**.

## Workflow Configuration for Rendering and Distributing Statements

A Workflow license is required to configure the Workflow action described below.

**Note:** This action can only be configured in Workflow Studio; it cannot be configured in Classic Workflow Configuration.

**Note:** This action is only available if licensed for the Image Statements module. The Distribution Process and Distribution Print Queue options are only available if licensed for the Document Distribution module.

You can configure a Workflow action to create jobs for rendering and distributing statements.

**Note:** This Workflow action only creates the jobs; it does not process them. In order to process jobs for rendering statements and/or distributing statements via a Print Queue, ensure that the OnBase Client is running with the **-PS** command line switch. In order to process jobs for distributing statements via email, ensure that the OnBase Client is running with the **-STMTMAILSRVR** command line switch.

To configure the Workflow action, select **Render Statement** from the **Action Type** drop-down list. You can specify a Print Queue, a Statement Type, and, optionally, a Distribution Process and a Distribution Print Queue.

1. From the **Print Queue** drop-down list, select the Print Queue you would like to use for distribution.

**Note:** Only network Print Queues are available for selection.

2. From the **Statement Type** drop-down list, select the Statement Type you would like to use for rendering statements.
3. If you wish to specify a Distribution Process for the rendered statements, select a process from the **Distribution Process** drop-down list.
4. If you wish to specify a Distribution Print Queue, select one from the **Distribution Print Queue** drop-down list.

**Note:** This drop-down list is only enabled when a **Distribution Process** is selected for a **Statement Type** that has been configured to use separate jobs for printing and archiving.

# Distribution Server Configuration

Document Distribution allows you to control certain parameters associated with the fax and e-mail distribution servers. For example, if a delivery is unsuccessful, the system can attempt to resend emails and faxes for a specified number of times before it sends a notification.

To configure Distribution Server parameters:

1. In the OnBase Client, select **Admin | Document Distribution | Server Configuration** at the menu bar.
2. Set the parameters that apply to the distribution method for the Document Distribution Process.

3. Select **Save & Close** when complete.

**Note:** Any field which requires a numerical value must have a value input that is not zero or blank.

| **Fax Server** | |
|---|---|
| **Retry Interval** | The period of time (hrs) after which the server attempts to execute a fax distribution process that has failed (i.e., exists in the Distribution Queue in a Failed status). |
| **Retry Duration** | The period of time (hrs) during which fax distribution retry attempts are made. |
| **Fax Timeout** | The period of time (min) after which an error condition is raised if a fax distribution does not occur (i.e., flagged with a Failed status). |
| **Distribution Source Keytype** | Indicates the distribution method for the document type. Select **Distribution Source** keyword type. |
| **Distribution Recipient Number Keytype** | Identifies the recipient associated with each workflow document. Select **Distribution Recipient Number** keyword type. |
| **Auto CD Transfer Doc Keytype** | Indicates the keyword type that is used to determine if a rendered document is transitioned to the **CD Customer Service** queue of the Document Distribution Workflow. Select **Auto CD Transfer Doc Handle** keyword type. |
| **Viewed Status Keytype** | Indicates the keyword type that is parsed to determine the viewed status of the rendered documents, and its routing in the **Notification Not Yet Viewed** queue of the Document Distribution Workflow. Select **View Status** keyword type.<br>If this keyword value is 0 (zero) or blank, the completed statement has a not viewed status. If the values is 1 (one), then the document is in a viewed status. |

| **Email Server Bounce Back** | |
|---|---|
| **Retry Interval** | Number of hours between attempts to reprocess an email distribution that has failed (i.e., exists in the Distribution Queue in a Failed status). |
| **Retry Duration** | Number of hours during which email distribution retry attempts are made. |

| Email Server Bounce Back | |
|---|---|
| **Enable Resend** | When enabled, this option will send a notification using the **Notification Resend Interval** and **Notification Resend Duration** settings until the Keyword Type value of the Keyword Type specified in the **View Status Keytype** drop-down list equals 1 or the duration has passed.<br><br>**Note:** If the **Enable Resend** option is not enabled, a Distribution Record is created for the failed notification(s). |
| **Notification Resend Interval** | Number of days between attempts to send an email notification indicating that the document is waiting to be viewed. |
| **Notification Resend Duration** | Number of days during which attempts will be made to resend an e-mail notification indicating that the document is waiting to be viewed.<br><br>**Note:** In the Distribution Queue, a job will continue to have a status of **In Progress** until the Notification Resend Duration period is complete. This will happen even if all notifications have successfully been sent. |
| **Distribution Record Document Type** | Indicates the document type into which undelivered documents are stored. Depending on the **Distribution Source Keytype** of the undelivered document, it is routed into the appropriate **Fax Customer Service**, **Email Customer Service**, or **Notification Customer Service** queue in the Document Distribution Workflow. Select the **DD – Distribution Record** document type. |
| **Produced CD Document Type** | Indicated the document type into which a produced CD record is saved. Select the **DD – Produced CD Record** document type. |
| **Notification Not Yet Viewed Document Type** | Indicates the document type that is parsed to determine whether or not a rendered document has been viewed by the intended recipient. Select **DD – Notification Not Yet Viewed Record** document type. |
| **Unidentified Email Folder** | Any email with a subject line other than OUT OF OFFICE or AUTOSTATEMENT: will be routed to this folder.<br><br>**Note:** This option is only functional when dmmailservices.dll is used. This option will not function when using SMTP/POP3.<br><br>**Note:** When using Microsoft Outlook, the folder must be on the same level with the Inbox. |

**Note:** When using the **Notification Resend** options in an Institutional system, the checkbox for **Enable Notification Resend** under **Utils | Institution Names | Settings** in the OnBase Client must also be checked.

# Configuring a Recipient

You can enter customer information to create recipients of rendered documents associated with a distribution process. Customer information identifies who receives these rendered documents as well as how and by what means those documents are distributed (for example, email, fax, or CD).

You can configure a recipient in the OnBase Client or the Unity Client. Recipients can be configured by manually entering customer information, or by importing customer information directly into OnBase from a file using the Customer Importer Processor. For more information on using the Customer Importer Processor, see Customer Importer Processor on page 97.

## Configuring a Recipient in the Client

You can configure a recipient by manually entering the recipient's customer information in the OnBase Client.

**Note:** If you are using an Oracle database, you must configure recipients in the OnBase Client.

The number of recipients that can be created is limited to the number of licenses purchased. If the limit is reached and you attempt to add additional recipients, an error message is displayed and the recipients are not added.

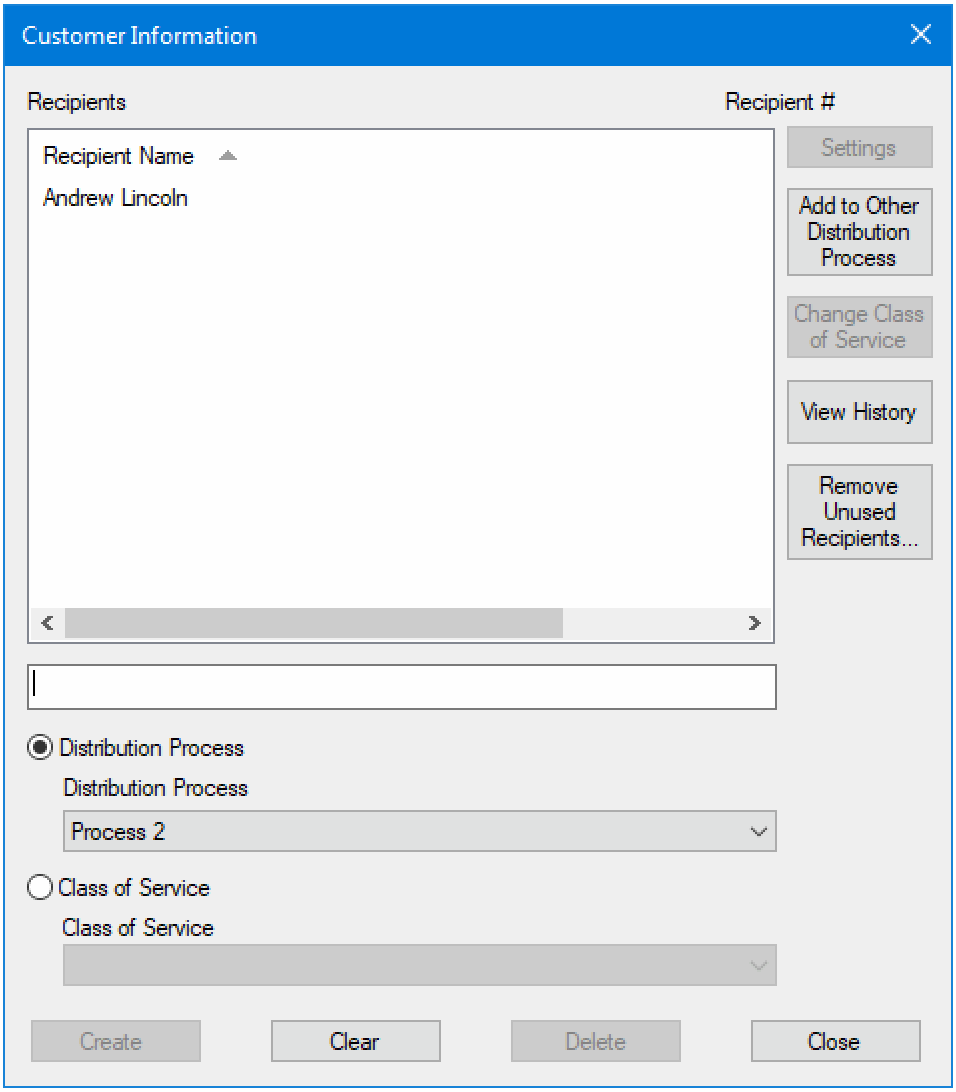
The number of recipients can exceed the number of licenses purchased, but only if the recipients in excess of the total licenses are added through the Dictionary Import Processor module.

Adding these additional recipients generates a warning message in the verification report. Contact your system administrator to resolve any licensing issues.

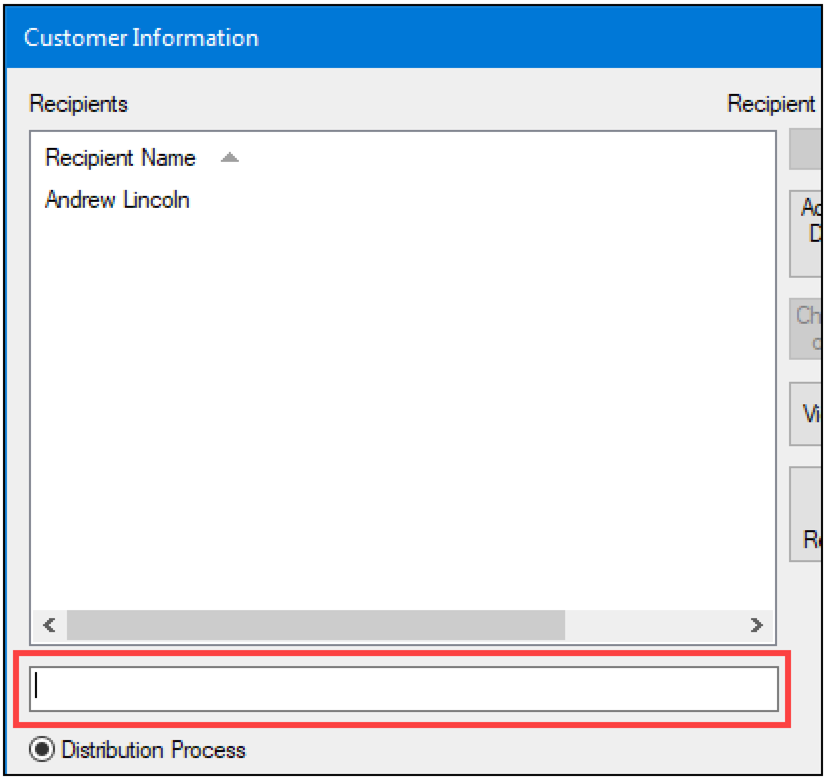
**Note:** See the **Dictionary Import Processor** documentation for more information on configuring and importing an index file.

To manually configure a recipient in the OnBase Client:

1. Select **File | Customer Information**. The **Customer Information** dialog box is displayed.



2. Below the **Recipients** section, enter the name of the new recipient in the field.




3. Select one of the following options for the new recipient:
   - **Distribution Process**
   - **Class of Service**

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**Note:** Depending on your configuration, one or both process options may be displayed. See Configuring a Document Distribution Process on page 56 for more information on configuring these options.

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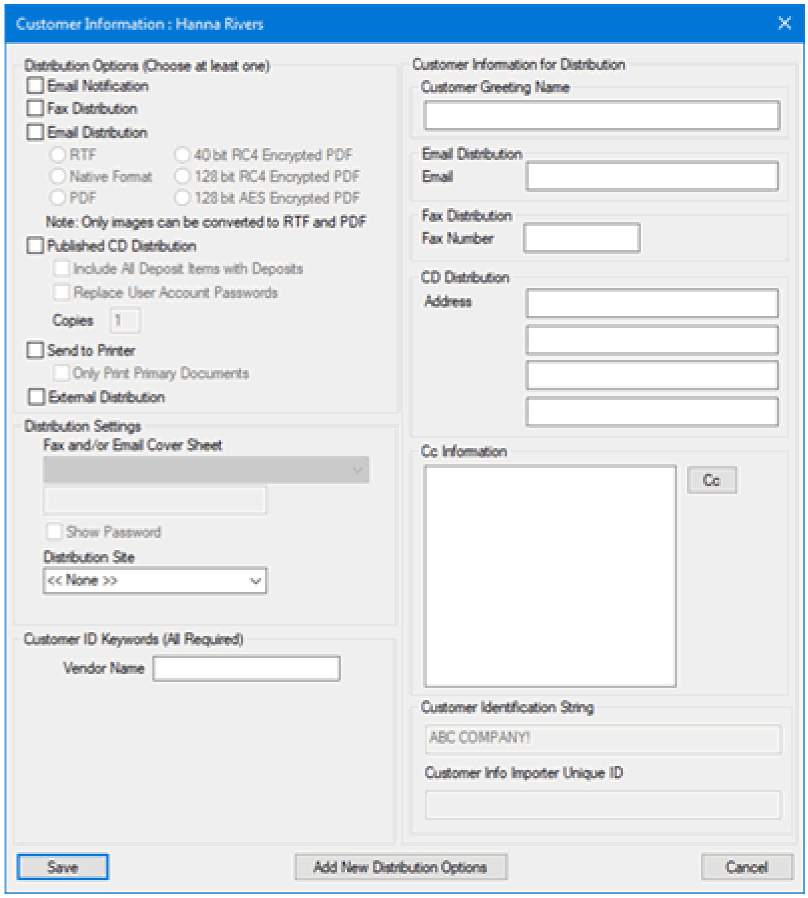
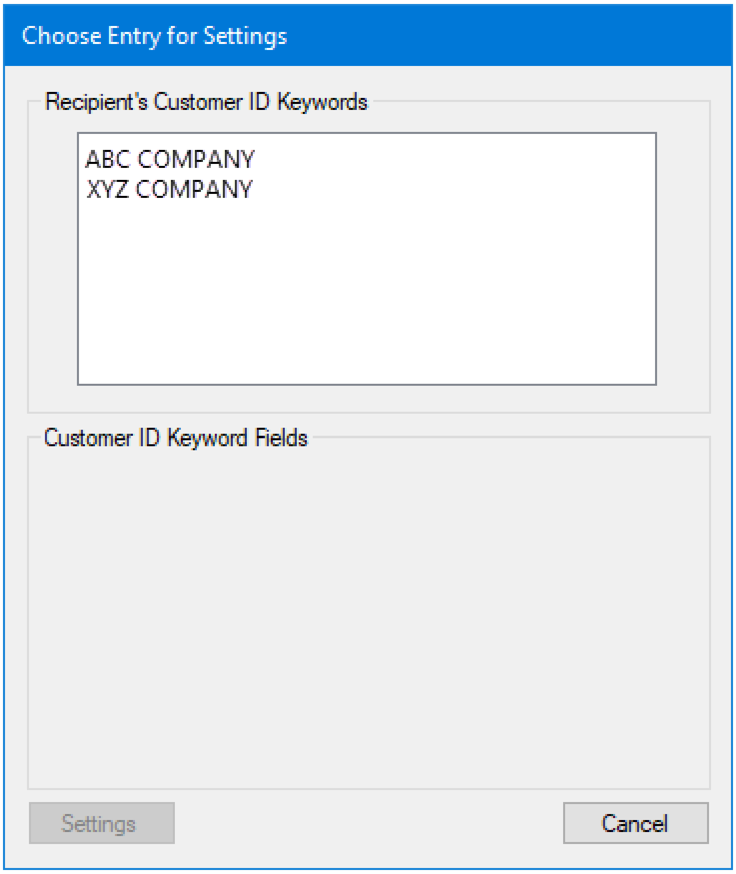
4. Depending on the option you selected, use the **Distribution Process** or **Class of Service** drop-down list to select the process option to associate with the recipient.

5. Click **Create**. Depending on whether the recipient is associated with one or more than one **Customer ID** Keyword Value, one of the following is displayed:
   - If only one **Customer ID** Keyword Value is associated with the recipient, the **Customer Information: [customer name]** dialog box is displayed.




**Note:** If a Customer ID Keyword Value is not configured, it does not appear in the **Customer Information: [customer name]** dialog box and is not available for the configuration of Keyword Values. See Configuring a Document Distribution Process on page 56 for more information on configuring a Customer ID Keyword Value for a distribution process.

   - If more than one **Customer ID** Keyword Value is associated with the recipient, the **Choose Entry for Settings** dialog box is displayed.




Select the customer ID you want to configure and click **Settings**. The **Choose Entry for Settings** dialog box is closed and the **Customer Information: [customer name]** dialog box is displayed.

6. From the **Customer Information: [customer name]** dialog box, specify the distribution options that determine the method for distribution. You must choose at least one distribution option. The following are the available distribution options:

| Distribution Options | Description |
|---|---|
| **Email Notification** | **Note:** The **Email Notification** option can use the Hyland Distribution Service by enabling the **Use Email Distribution Service for Document Distribution** option. If the Distribution Service is used, a temporary file cache must be created. For more information about the Hyland Distribution Service, see Configuring the Distribution Service on page 152.<br><br>Sends a plain text message to the email address of the recipient identified by the distribution process configuration. The message contains a link to a designated website where the distributed documents can be viewed by the recipient. |
| **Fax Distribution** | Sends a copy of the rendered statements to the fax number specified for the recipient identified by the distribution process configuration. |
| **Email Distribution** | **Note:** The **Email Distribution** option can use the Hyland Distribution Service by enabling the **Use Email Distribution Service for Document Distribution** option. If the Distribution Service is used, a temporary file cache must be created. For more information about the Hyland Distribution Service, see Configuring the Distribution Service on page 152.<br><br>Sends an email attachment of the rendered statements to the email address of the recipient identified by the distribution process configuration. When selected, the statements can be sent in one of the following formats:<br>• **RTF**<br>• **Native Format**<br>• **PDF**<br>• **40 bit RC4 Encrypted PDF**<br>• **128 bit RC4 Encrypted PDF**<br>• **128 bit AES Encrypted PDF**<br><br>**Note:** Depending on your configuration, you may not see all these options.<br><br>Enter a value in the **Password** field when distributing by encrypted PDFs. See the information about the Password field in step 7.<br><br>**Note:** Depending on the file format of a document, the document may not be converted to the specified format when distributed. While image documents are converted to any specified format, text documents are not. PDF documents are converted to any encrypted PDF format but they are not converted to image or RTF formats. |

| Distribution Options | Description |
|---|---|
| **Published CD Distribution** | Creates a CD of the rendered statements. When this option is selected, the following options are available:<br>• **Include All Deposit Items with Deposit**: Select this option if deposit items are included in the distribution.<br>• **Replace User Account Passwords**: Select this option to replace user account passwords with a specified password. When selected, the **Password** field in **Distribution Settings** is available and a password must be entered.<br>**Note:** You must enter a password or the CD publishing job does not complete.<br>• **Copies**: Enter the number of copies of the rendered statements you want to distribute to recipients. |
| **Send to Printer** | Prints each statement to the printer configured for the statement type in addition to the electronic delivery method for the statement. When this option is selected, the **Only Print Primary Documents** option is available. Select this option to only print primary documents from the rendered statement.<br>Both primary and secondary documents can still be distributed according to the desired distribution process, but only the primary documents are printed. If any reconciliation pages or enclosures have been configured, they are archived with the secondary documents.<br>**Note:** When OMR marks are configured correctly for a statement type, every printed statement contains the OMR marks regardless of whether the statement type uses separate jobs for printing and archiving. If the statement type uses separate jobs for printing and archiving, archived images that are electronically distributed do not contain the OMR marks. |
| **External Distribution** | Recognizes statements distributed through another process. This option should be selected when the statement is distributed outside of OnBase by a third-party method. |

**Note:** If the **Send to Printer** option is not selected for the distribution process, ensure the user performing the rendering process has print job deletion rights for their Windows user account to avoid printing statements to a physical printer. Print job deletion rights are configured on the network level, not in OnBase.

7. Specify the distribution settings for the selected distribution options:

| Distribution Setting | Description |
|---|---|
| **Fax and/or Email Cover Sheet** | Specify a cover sheet (delivery template) from the drop-down list if either the **Email Distribution** option or the **Fax Distribution** option is selected for the distribution.<br>**Note:** Cover sheets are created in the **Delivery Template Configuration** dialog box. See Configuring a Delivery Template on page 51 for more information on creating a cover sheet. |
| **Password** | Enter a password in the field. This password overrides the PDF Encryption Owner Password.<br>**Note:** See the section on PDF encryption settings in the **External Mail Services** documentation for more information on encrypting PDFs sent using an External Mail Services system.<br>This field is available when one of the following distribution options is selected:<br>• **Replace User Account Passwords** (under the **Published CD Distribution** option)<br>**Note:** If a recipient for a CD Distribution provides CC copies to other recipients for the same document, all recipients must use the same password.<br>• **40 bit RC4 Encrypted PDF** (under the **Email Distribution option**)<br>• **128 bit RC4 Encrypted PDF** (under the **Email Distribution option**)<br>• **128 bit AES Encrypted PDF** (under the **Email Distribution option**)<br>**Note:** When using an encrypted PDF distribution option, a password is required.<br>When this option is available, the **Show Password** option is also available. When this option is selected, the **Password** field value is displayed in plain text. When this option is not selected, the **Password** field value is masked. |
| **Distribution Site** | Select the distribution site to associate with the recipient.<br>**Note:** You must select a configured distribution site from the drop-down list. The OnBase Client does not recognize distribution sites that are typed into the drop-down list field. |

8. From the **Customer ID Keywords (All Required)** section, enter Keyword Values for the configured Keyword Types of the distribution process or associated class of service. The entered Keyword Values are compared to the Keyword Values on the rendered documents to determine whether they are sent to the recipient. If a match is made for all the Keyword Values, the documents are sent.

   The Keyword Values currently configured for the recipient are reflected in the **Customer Identification String** field. If the Keyword Values were assigned from the Customer Information Importer, the Customer Importer Process Name is identified in the **Customer Info Unique ID** field.

**Note:** All recipients that share the same combination of Customer ID Keyword Values that match a rendered statement receive a copy of the statement.

9. Enter customer information in the **Customer Information for Distribution** section. The following options are available:

| Customer Information Options | Description |
|---|---|
| **Customer Greeting Name** | Enter the text to be used as a greeting in the distribution. For example, if the distribution is going to Hanna Rivers, you could enter **Dear Hanna Rivers:** to begin the cover letter or email. Enter any punctuation for the greeting into this field, as punctuation is not automatically added. The entered greeting is used in delivery templates, faxing, or emailing.<br>**Note:** The maximum number of characters allowed is 30. |
| **Email** | Enter the recipient's email address. |
| **Fax Number** | Enter the recipient's fax number. Store the appropriate number (for example, dial-out access) consistent with WinFax configuration. |
| **Address** | Enter the recipient's mailing address. Four fields are provided so the recipient's mailing address can be physically printed on the CD. |
| **Cc Information** | Displays recipients whose **Customer ID** Keyword Values match other recipients configured for the same distribution process. For more information, see Adding a CC Recipient on page 75 to add CC recipients in the OnBase Client.<br>Multiple recipients receive the same distributed documents; however, each one can have their own delivery method.<br>If a password is used, the same password value used for the original recipient must be entered for every recipient included in the **Cc Information** field. |
| **Customer Identification String** | Displays an automatically combined Keyword Value data string created by the system to uniquely identify the recipient. The string is a combination of the configured Keyword Values and the recipient name.<br>Keyword Values are separated by a dash and then a vertical bar followed by the recipient name. |
| **Customer Info Importer Unique ID** | Displays a value that uniquely represents each customer information record in the database. |

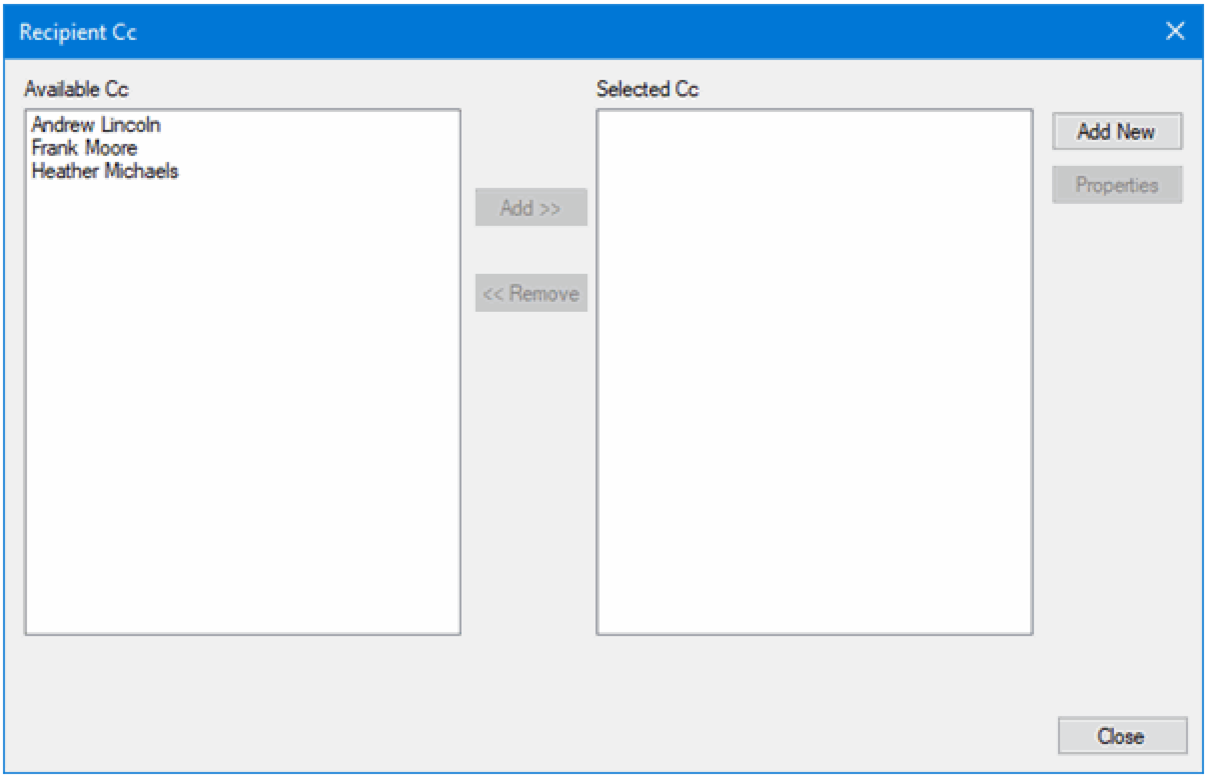
10. Click **Save**.

## Adding a CC Recipient

You can add a CC recipient when configuring a recipient's customer information for a distribution process.

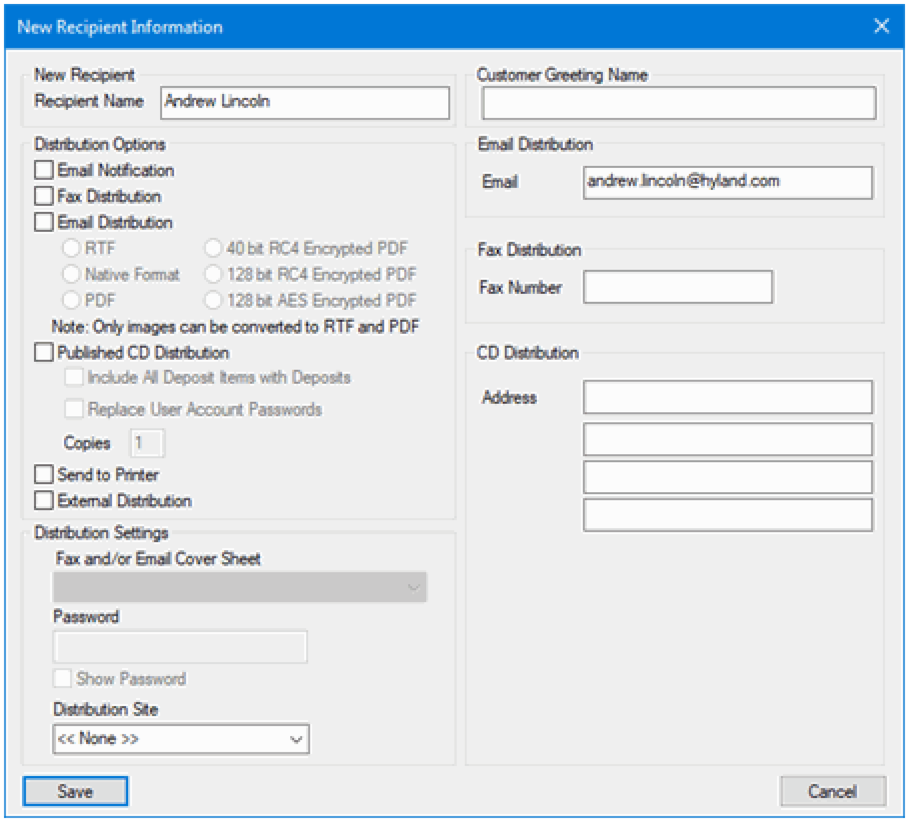
To add a CC recipient:

1. From the **Customer Information: [customer name]** dialog box, in the **Cc Information** section, click the **Cc** button. The **Recipient Cc** dialog box is displayed.



2. To configure a recipient, do one of the following:
   - Select an existing recipient from the **Available Cc** section and click **Add**.
   - Click the **Add New** button to add a new recipient.

   The **New Recipient Information** dialog box is displayed.



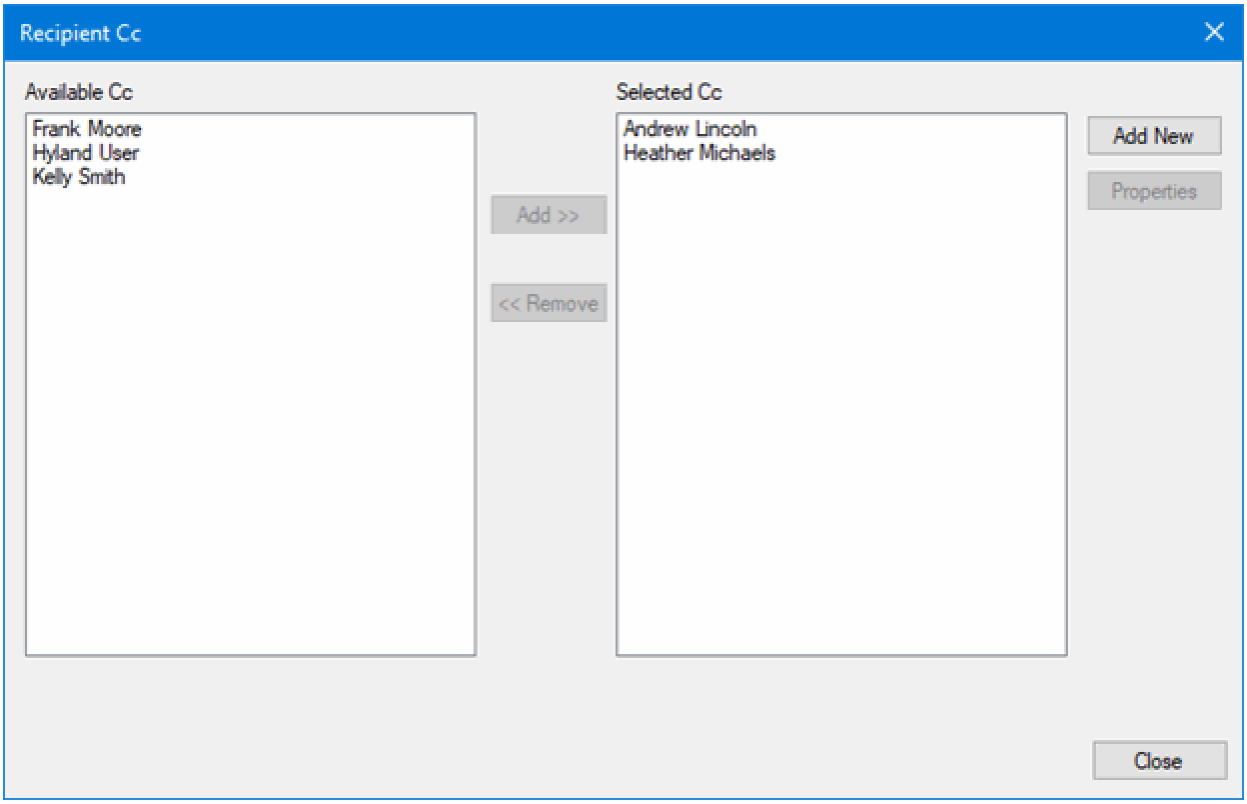

3. Enter or edit the recipient's name in the **Recipient Name** field.
4. Select the appropriate options from the **Distribution Options**, **Distribution Settings**, and **Customer Information** sections. See Configuring a Recipient in the Client on page 66 for information on these settings.
5. Click **Save**. The recipient is added to the **Selected Cc** section.
6. Click **Close**. The **Cc Information** field now contains your selected CC recipients.

## Editing CC Recipient Information

You can edit existing CC recipient information of recipients added to the **Cc Information** field.

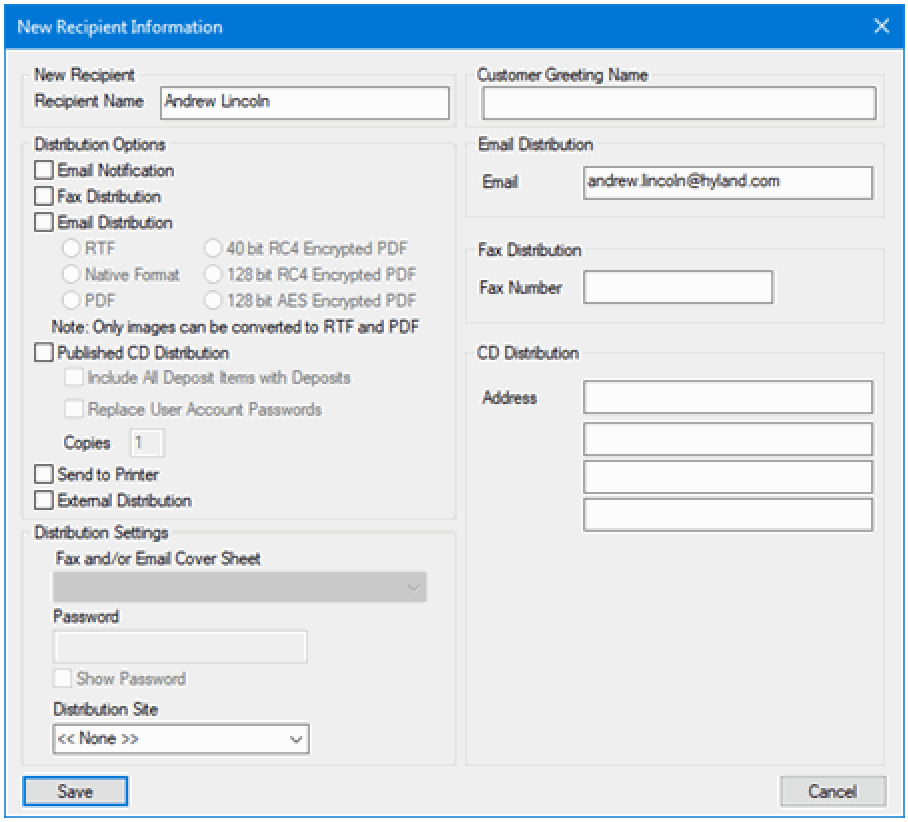
To edit CC recipient information:

1. From the **Customer Information: [customer name]** dialog box, in the **Cc Information** section, click the **Cc** button. The **Recipient Cc** dialog box is displayed.




2. Select a recipient from the **Selected Cc** section.

3. Click the **Properties** button. The **New Recipient Information** dialog box is displayed.



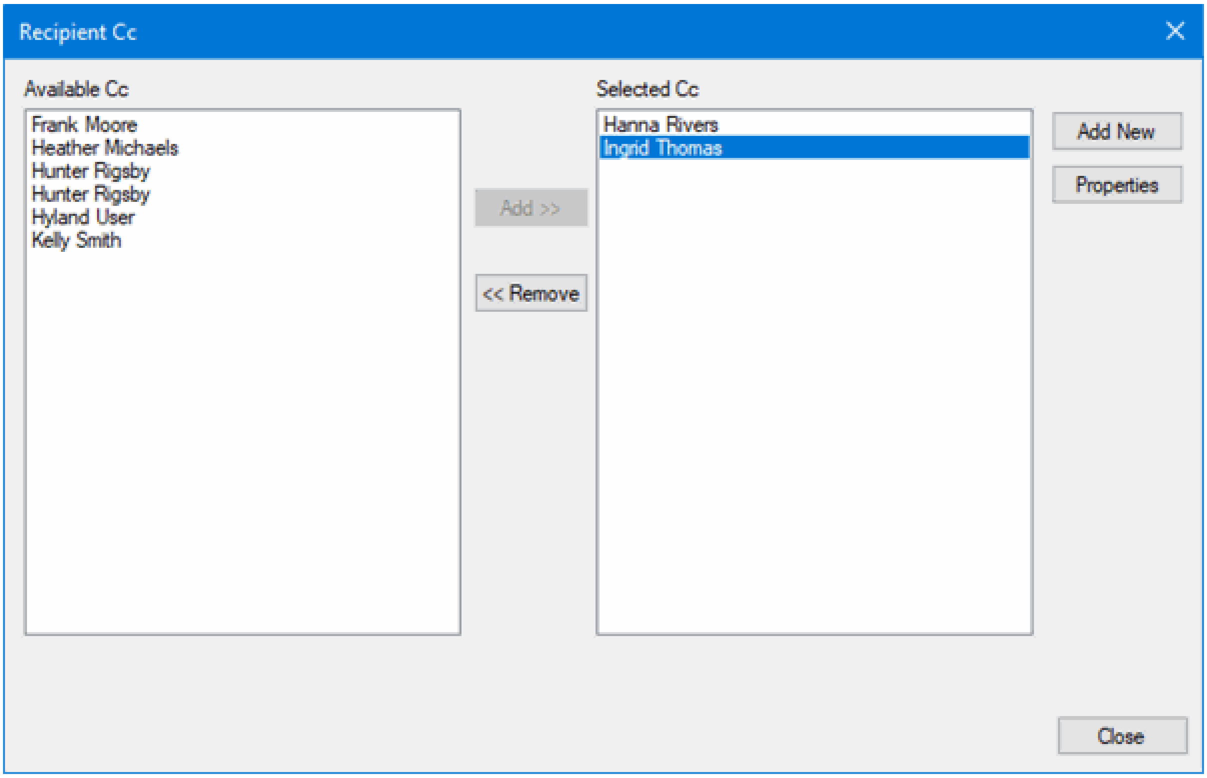

4. Edit options and settings as needed. For more information see Configuring a Recipient in the Client on page 66 on the options and settings in this dialog box.
5. Click **Save**. The CC recipient's information is updated.
6. Click **Close**.

## Removing a CC Recipient

You can remove a CC recipient from the **Cc Information** field.

To remove a CC recipient:

1. From the **Customer Information: [customer name]** dialog box, in the **Cc Information** section, click the **Cc** button. The **Recipient Cc** dialog box is displayed.




2. Select the recipient you want to remove from the **Selected Cc** section.
3. Click the **Remove** button. The selected recipient is removed from the **Selected Cc** list.
4. Click **Close**. The selected recipient is removed from the **Cc Information** field.

## Configuring a Recipient in the Unity Client

You can configure a recipient by manually entering the recipient's customer information in the Unity Client.

**Note:** If you are using an Oracle database, you must configure recipients in the OnBase Client.

To configure recipients in the Unity Client, you must have the **Customer Information** privilege or the **Document Distribution** product right enabled to access the **Customer Information** layout. See User Groups and Rights on page 50 for more information on enabling privileges and product rights for user groups.

The number of recipients that can be created is limited to the number of licenses purchased. If the limit is reached and you attempt to add additional recipients, an error message is displayed and the recipients are not added.

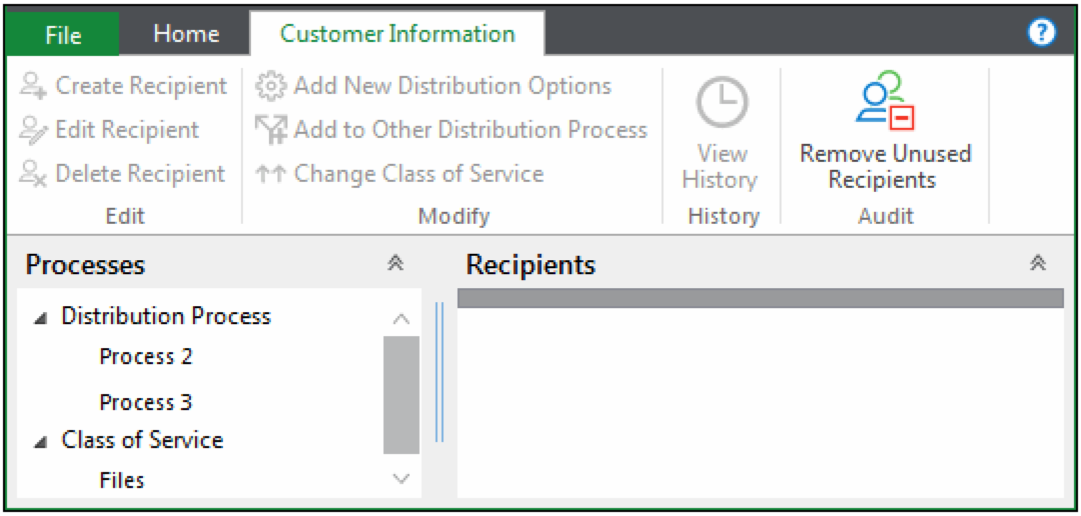
The number of recipients can exceed the number of licenses purchased, but only if the recipients in excess of the total licenses are added through the Dictionary Import Processor module.

Adding these additional recipients generates a warning message in the verification report. Contact your system administrator to resolve any licensing issues.

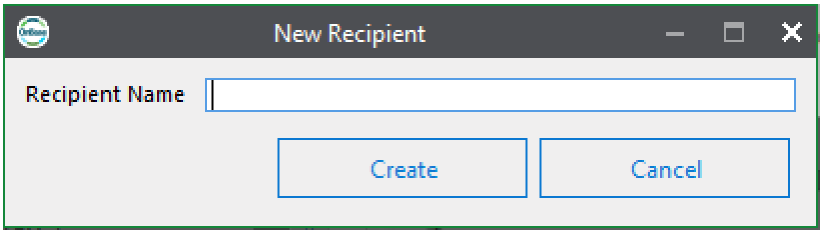
**Note:** See the **Dictionary Import Processor** documentation for more information on configuring and importing an index file.

To manually configure a recipient in the Unity Client:

1. Select **File | Administration | Customer Information**. The **Customer Information** layout is displayed.

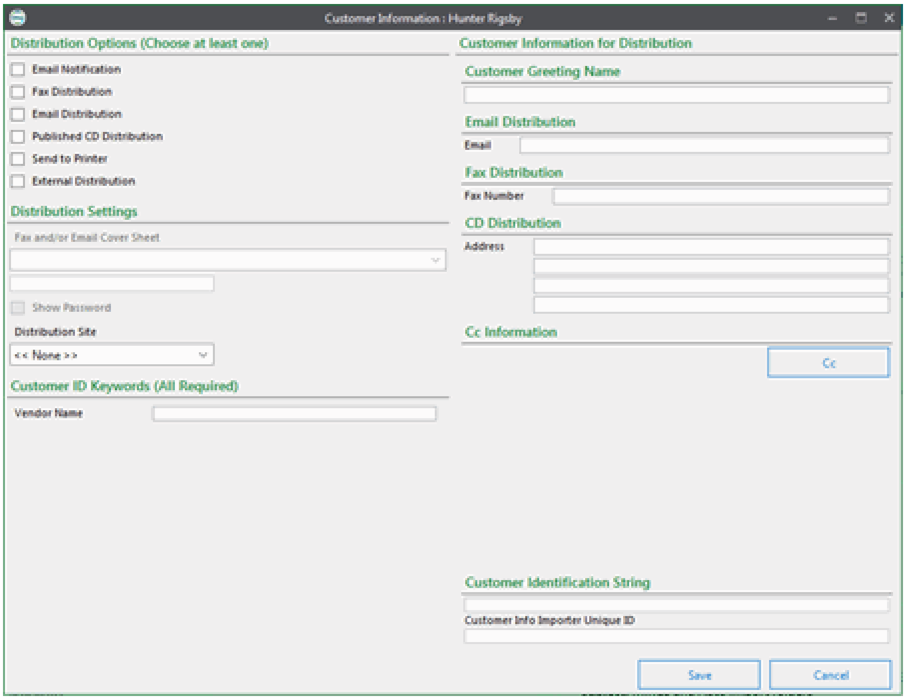



2. Select a distribution process or a class of service from the **Processes** pane. Any existing recipients for the selected process are displayed in the **Recipients** pane.
3. From the **Customer Information** tab, click **Create Recipient**. The **New Recipient** dialog box is displayed.




4. Enter the name of the new recipient in the **Recipient Name** field.

5. Click **Create**. The **Customer Information: [customer name]** dialog box is displayed.




6. Specify the distribution options that determine the method for distribution. You must choose at least one distribution option. The following are the available distribution options:

| Distribution Options | Description |
| --- | --- |
| **Email Notification** | **Note:** The **Email Notification** option can use the Hyland Distribution Service by enabling the **Use Email Distribution Service for Document Distribution** option. If the Distribution Service is used, a temporary file cache must be created. For more information about the Hyland Distribution Service, see Configuring the Distribution Service on page 152.<br><br>Sends a plain text message to the email address of the recipient identified by the distribution process configuration. The message contains a link to a designated website where the distributed documents can be viewed by the recipient. |
| **Fax Distribution** | Sends a copy of the rendered statements to the fax number specified for the recipient identified by the distribution process configuration. |
| **Email Distribution** | **Note:** The **Email Distribution** option can use the Hyland Distribution Service by enabling the **Use Email Distribution Service for Document Distribution** option. If the Distribution Service is used, a temporary file cache must be created. For more information about the Hyland Distribution Service, see Configuring the Distribution Service on page 152.<br><br>Sends an email attachment of the rendered statements to the email address of the recipient identified by the distribution process configuration. When selected, the statements can be sent in one of the following formats:<br>• **RTF**<br>• **Native Format**<br>• **PDF**<br>• **40 bit RC4 Encrypted PDF**<br>• **128 bit RC4 Encrypted PDF**<br>• **128 bit AES Encrypted PDF**<br><br>**Note:** Depending on your configuration, you may not see all these options.<br><br>Enter a value in the **Password** field when distributing via encrypted PDFs. See the information about the Password field in step 7.<br><br>**Note:** Depending on the file format of a document, the document may not be converted to the specified format when distributed. While image documents are converted to any specified format, text documents are not. PDF documents are converted to any encrypted PDF format but they are not converted to image or RTF formats. |

| Distribution Options | Description |
|---|---|
| **Published CD Distribution** | Creates a CD of the rendered statements. When this option is selected, the following options are available:<br>• **Include All Deposit Items with Deposit**: Select this option if deposit items are included in the distribution.<br>• **Replace User Account Passwords**: Select this option to replace user account passwords with a specified password. When selected, the **Password** field in **Distribution Settings** is available and a password must be entered.<br>**Note:** You must enter a password or the CD publishing job does not complete.<br>• **Copies**: Enter the number of copies of the rendered statements you want to distribute to recipients. |
| **Send to Printer** | Prints each statement to the printer configured for the statement type in addition to the electronic delivery method for the statement. When this option is selected, the **Only Print Primary Documents** option is available. Select this option to only print primary documents from the rendered statement.<br>Both primary and secondary documents can still be distributed according to the desired distribution process, but only the primary documents will be printed. If any reconciliation pages or enclosures have been configured, they are archived with the secondary documents.<br>**Note:** When OMR marks are configured correctly for a statement type, every printed statement contains the OMR marks regardless of whether the statement type uses separate jobs for printing and archiving. If the statement type uses separate jobs for printing and archiving, archived images that are electronically distributed will not contain the OMR marks. |
| **External Distribution** | Recognizes statements distributed through another process. This option should be selected when the statement is distributed outside of OnBase by a third-party method. |

**Note:** If the distribution process does not have the **Send to Printer** option selected, ensure the user account that is performing the rendering process has print job deletion rights to avoid printing the statements to a physical printer. This is not configured in OnBase. It should be configured at the network level.

7. Specify the distribution settings for the selected distribution options:

| Distribution Setting | Description |
|---|---|
| **Fax and/or Email Cover Sheet** | Specify a cover sheet (or, delivery template) from the drop-down list if either the **Email Distribution** option or the **Fax Distribution** option is selected for the distribution.<br><br>**Note:** Cover sheets are created in the **Delivery Template Configuration** dialog box. See Configuring a Delivery Template on page 51 for more information on creating a cover sheet. |
| **Password** | Enter a password in the field. This password overrides the **PDF Encryption Owner Password** in OnBase Configuration.<br><br>**Note:** See the section on PDF encryption settings in the **External Mail Services** documentation for more information on encrypting PDFs sent using an External Mail Services system.<br><br>This field is available when one of the following distribution options are selected:<br>• **Replace User Account Passwords** (under the **Published CD Distribution** option)<br><br>**Note:** If a recipient for a CD Distribution provides CC copies to other recipients for the same document, all recipients must use the same password.<br><br>• **40 bit RC4 Encrypted PDF** (under the **Email Distribution option**)<br>• **128 bit RC4 Encrypted PDF** (under the **Email Distribution option**)<br>• **128 bit AES Encrypted PDF** (under the **Email Distribution option**)<br><br>**Note:** When using an encrypted PDF distribution option, a password is required.<br><br>When this option is available, the **Show Password** option is also available. When this option is selected, the **Password** field value is displayed in plain text. When this option is not selected, the **Password** field value is masked. |
| **Distribution Site** | Select the distribution site to associate with the recipient. |

8. From the **Customer ID Keywords (All Required)** section, enter Keyword Values for the configured Keyword Types of the distribution process (or associated class of service). The entered Keyword Values are compared to the Keyword Values on the rendered documents to determine whether they are sent to the recipient. If a match is made for all the Keyword Values, the documents are sent.

   The Keyword Values currently configured for the recipient are reflected in the **Customer Identification String** field. If the Keyword Values were assigned from the Customer Information Importer, the Customer Importer Process Name is identified in the **Customer Info Unique ID** field.

**Note:** All recipients that share the same combination of Customer ID Keyword Values that match a rendered statement will receive a copy of the statement.

9. Enter customer information in the **Customer Information for Distribution** section. The following are the available options:

| Customer Information Options | Description |
|---|---|
| **Customer Greeting Name** | Enter text to be used as a greeting in the distribution. For example, **Dear <Customer Name>** or **Hello <Company Name>**. The entered greeting is used in delivery templates, faxing, or emailing.<br>**Note:** The maximum number of characters allowed is 30. |
| **Email** | Enter the recipient's email address. |
| **Fax Number** | Enter the recipient's fax number. Store the appropriate number (for example, dial-out access) consistent with WinFax configuration. |
| **Address** | Enter the recipient's mailing address. Four fields are provided so the recipient's mailing address can be physically printed on the CD. |
| **Cc Information** | Displays recipients whose **Customer ID** Keyword Values match other recipients configured for the same distribution process. See Adding a CC Recipient in the Unity Client on page 87 to add CC recipients in the Unity Client.<br>Multiple recipients receive the same distributed documents; however, each one can have their own delivery method.<br>If a password is used, the same password value used for the original recipient must be entered for every recipient included in the **Cc Information** field. |
| **Customer Identification String** | Displays an automatically concatenated Keyword Value data string created by the system to uniquely identify the recipient. The string is a combination of the configured Keyword Values and the recipient name.<br>Keyword Values are separated by a dash and then a vertical bar followed by the recipient name. |
| **Customer Info Importer Unique ID** | Displays a value that uniquely represents each customer information record in the database. |

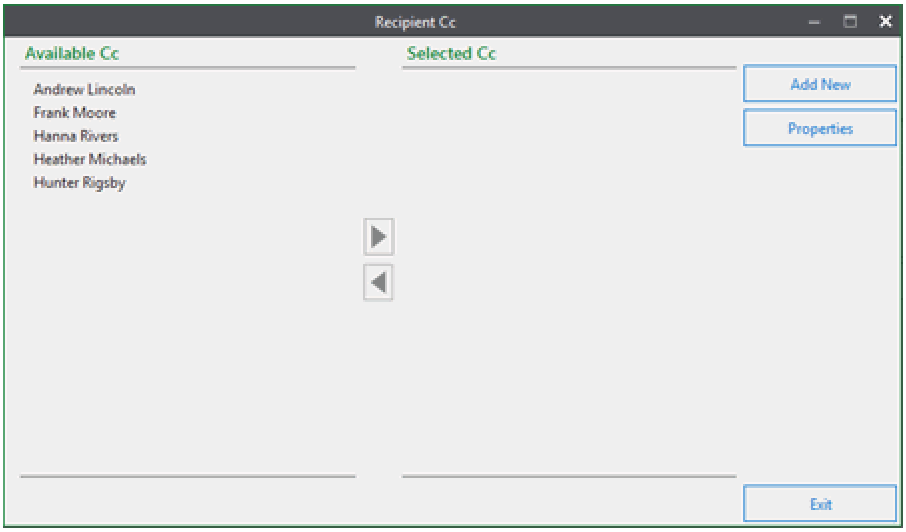
10. Click **Save**.

## Adding a CC Recipient in the Unity Client

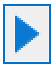
You can add a CC recipient when configuring a recipient's customer information for a distribution process.

To add a CC recipient in the Unity Client:

1. From the **Customer Information: [customer name]** dialog box, in the **Cc Information** section, click the **Cc** button. The **Recipient Cc** dialog box is displayed.

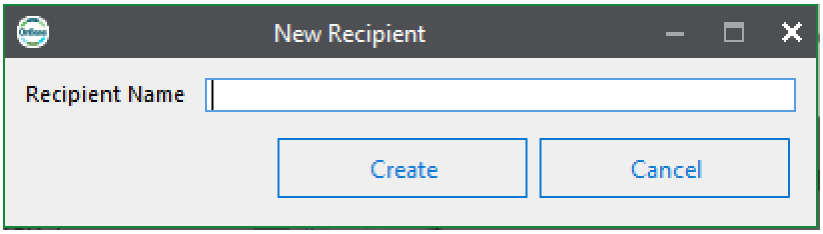



2. To add a recipient, do one of the following:
   - Select an existing recipient from the **Available Cc** section and click the **Add** button.



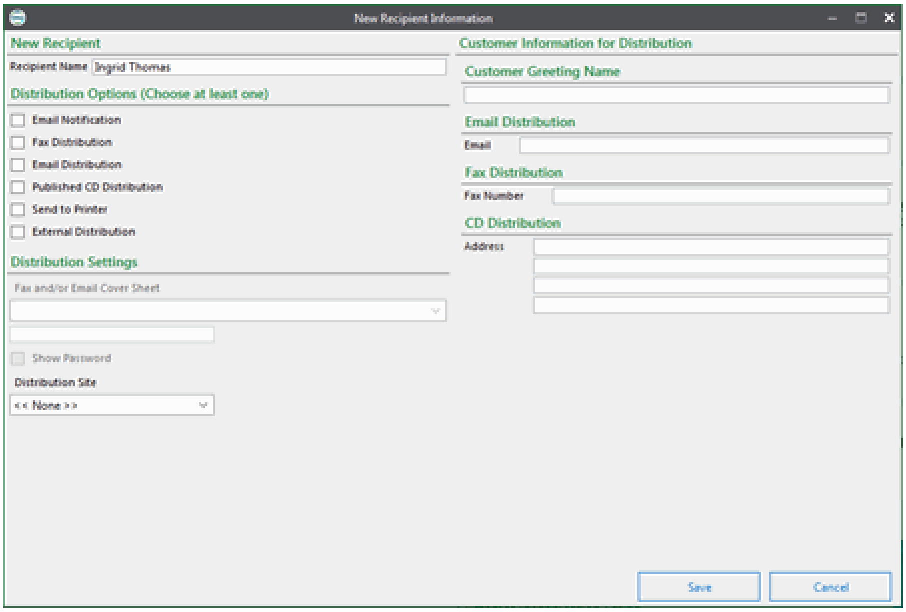
   - Click the **Add New** button to add a new recipient.

   The **New Recipient Information** dialog box is displayed.




3. Enter the name of the new recipient in the **Recipient Name** field.

4. Click **Create**. The **New Recipient Information** dialog box is displayed.



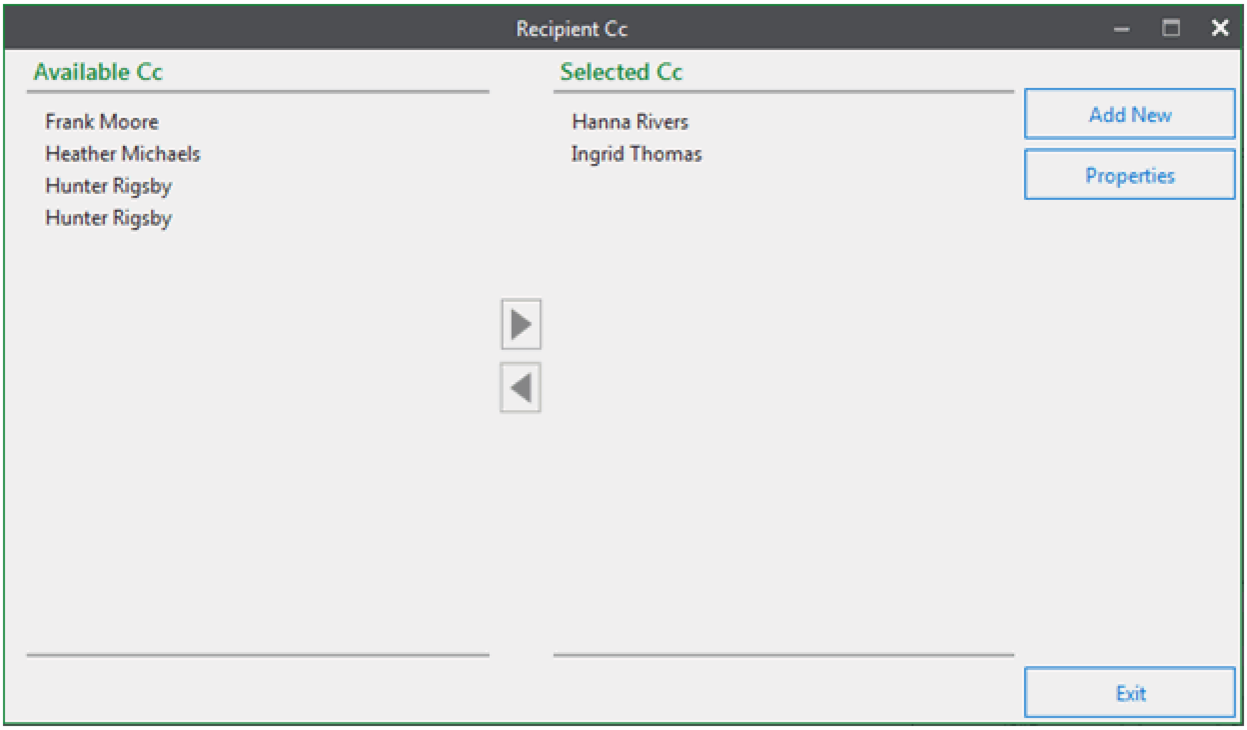

5. Select the appropriate options from the **Distribution Options**, **Distribution Settings**, and **Customer Information** sections. See Configuring a Recipient in the Unity Client on page 80 for information on these settings.
6. Click **Save**. The recipient is added to the **Selected Cc** section.
7. Click **Exit**. The **Cc Information** field now contains your selected CC recipient.

## Editing a CC Recipient in the Unity Client

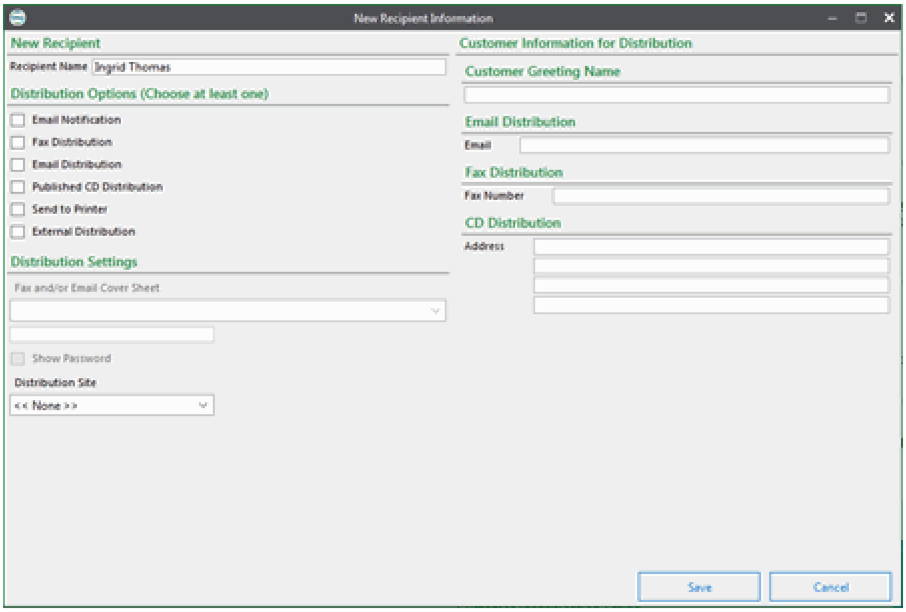
You can edit existing CC recipient information of recipients added to the **Cc Information** field.

To edit CC recipient information:

1. From the **Customer Information: [customer name]** dialog box, in the **Cc Information** section, click the **Cc** button. The **Recipient Cc** dialog box is displayed.




2. Select a recipient from the **Selected Cc** section.
3. Click **Properties**. The **New Recipient Information** dialog box is displayed.



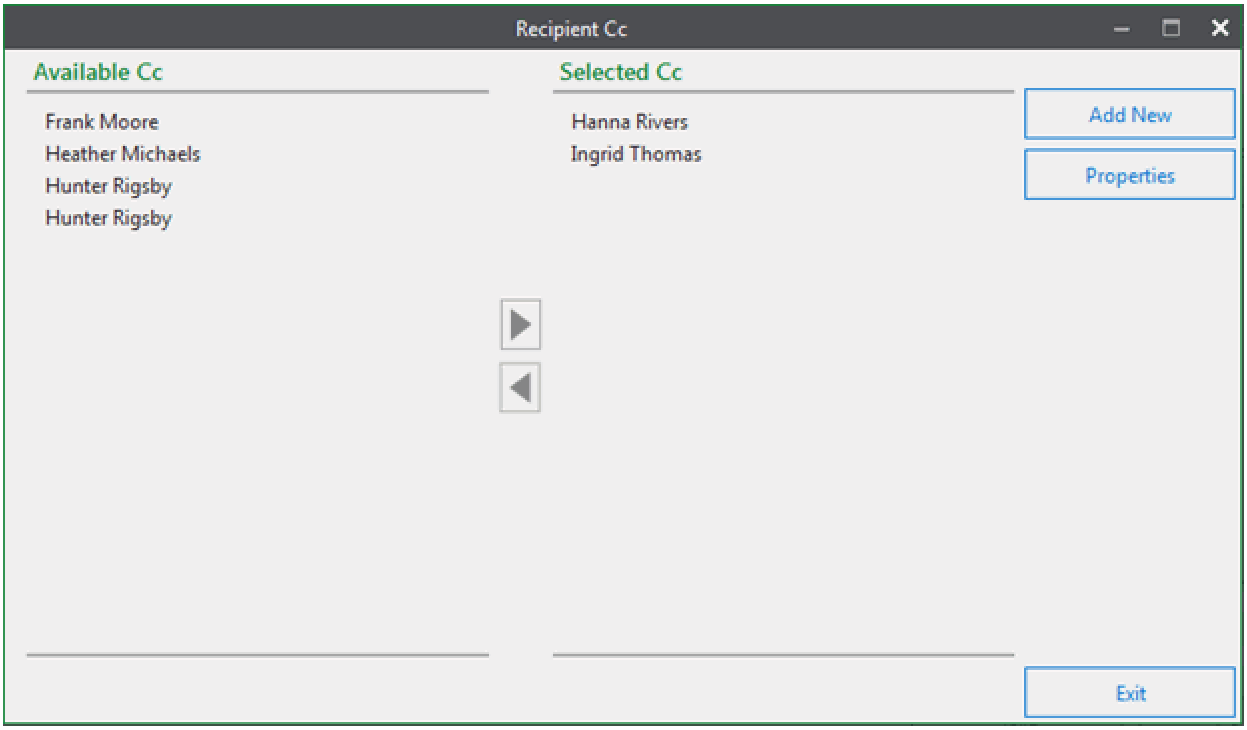
4. Edit options and settings as needed. For more information see Configuring a Recipient in the Unity Client on page 80 on the options and settings in this dialog box.
5. Click **Save**. The CC recipient's information is updated.
6. Click **Exit**.

## Removing a CC Recipient from the Unity Client

You can remove a CC recipient from the **Cc Information** field.

To remove a recipient:

1. From the **Customer Information: [customer name]** dialog box, in the **Cc Information** section, click the **Cc** button. The **Recipient Cc** dialog box is displayed.




2. Select a recipient that you want to remove from the **Selected Cc** section.
3. Click the **Remove** button.

The selected recipient is removed from the **Selected Cc** section.
4. Click **Exit**. The recipient is removed from the **Cc Information** field.

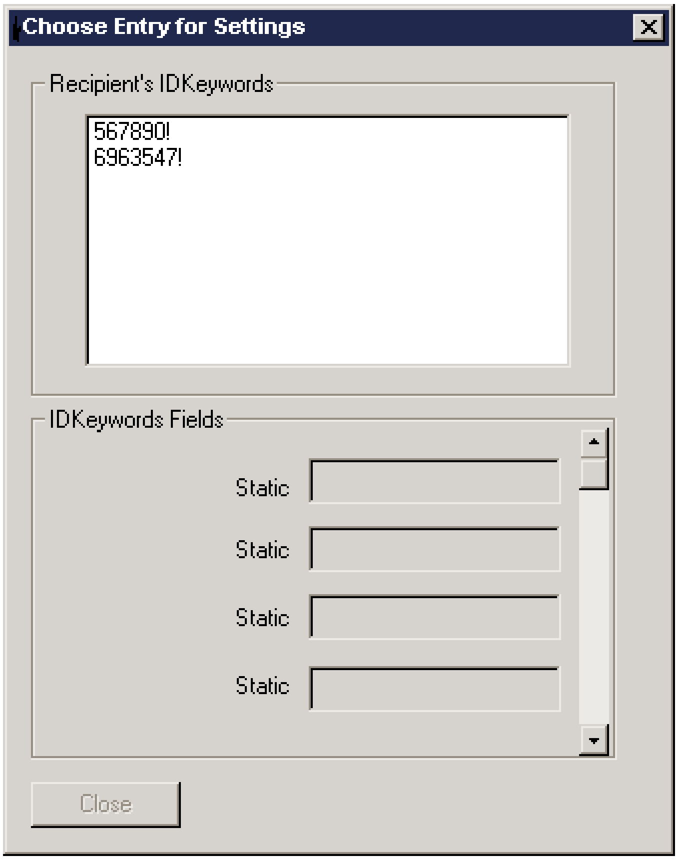
# Configuring a Recipient for Multiple Distributions

To enable this recipient to receive distributions based on different keyword values:

1. Click **Create New** on the **Customer Information** dialog box.
2. A message box appears, click **Yes** to use the same **Distribution Options** or **No** to specify a new delivery method.
3. Then enter the new keyword combination and click **Save & Close**.

**Note:** Step 3 only applies to distributions that are not using a class of service.

**Note:** When a recipient has more than one set of keyword values, the following dialog window appears when choosing a recipient at the **Customer Information** dialog box. To open a specific **Customer Information** record, choose the appropriate recipient's ID Keywords and choose **Close**.

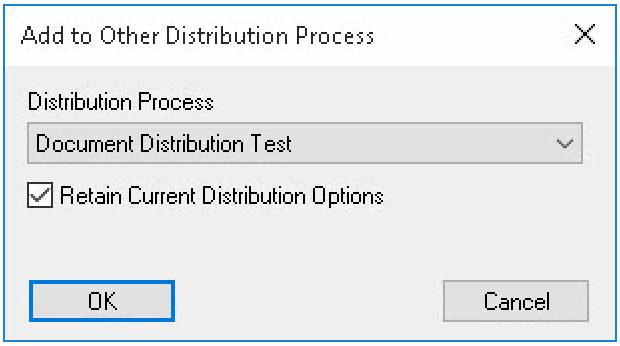


# Associating a Recipient with Multiple Distribution Processes or Classes of Service

Recipients can be associated with multiple distribution processes or classes of services at the same time.

To associate a recipient with another distribution or class of service:

1. Select the appropriate recipient.
2. Click **Add to Other Distribution Process**.
3. Select either the radio button beside **Distribution Process** or **Class of Service**.
4. Select the appropriate item from the drop-down menu.




5. Select **Retain Current Distribution Options** to copy over the recipient's distribution options (such as email, fax, number of copies for printing, etc).

**Note:** If there are no regular distribution processes in the system, this option is unavailable.

6. Click **OK**. The **Customer Information: *Recipient*** dialog box is displayed.
7. Enter the appropriate information and click **Save & Close**.

# Changing the Associated Class of Service

The class of service a recipient is associated with can be changed. When a class of service is changed, the recipient is removed from its class of service and added to a new class of service. If a recipient belongs to more than one class of service, it will only be removed from the class of service currently selected. To change a class of service:

1. Select the appropriate recipient.
2. Click **Change Class of Service**.
3. Select the appropriate class of service from the drop-down menu.
4. Click **OK**. The recipient will be removed from the list of recipients for the current class of service.

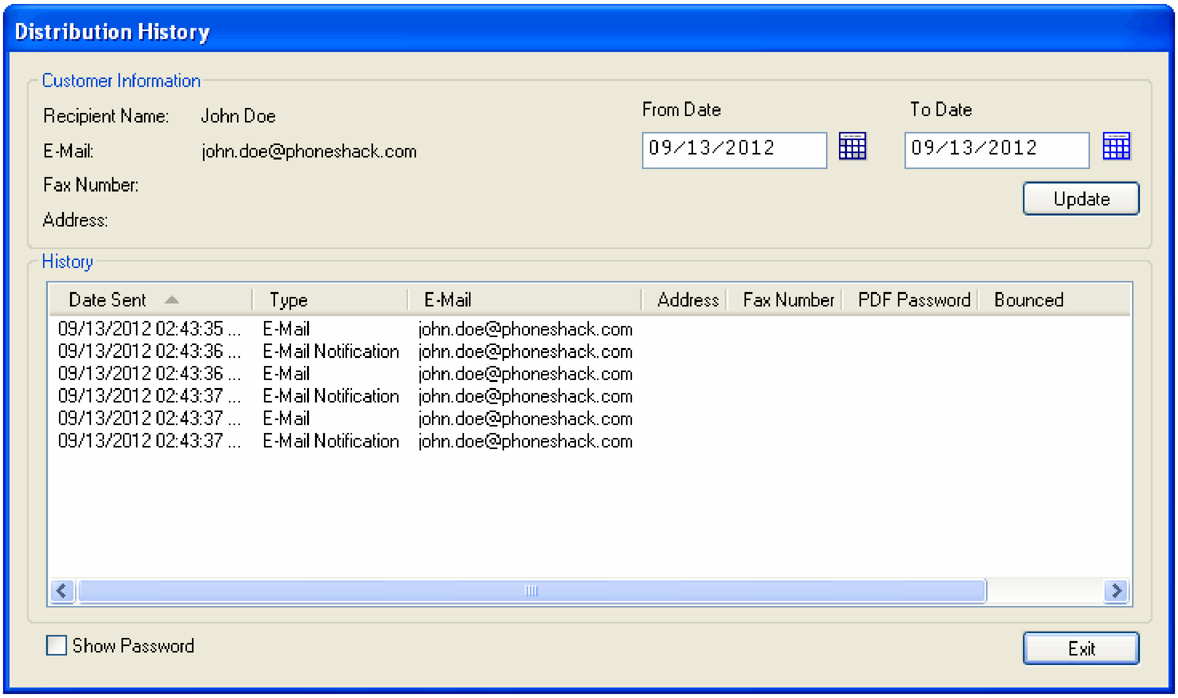
# Viewing the Distribution History

You can view a recipient's distribution history to see how the recipient's distribution methods and delivery information have changed over time. The following items are tracked in the distribution history:

- Email notifications
- Email distributions
- Fax jobs
- CD distribution jobs
- Print-only jobs

To view a recipient's distribution history:

1. Select the appropriate recipient.
2. Click **View History**. The **Distribution History** dialog box is displayed.




3. View the information displayed, sorting by column headers as desired.
4. If you wish to change the date range for the distribution history that is displayed, select or enter the desired dates in the **From Date** and **To Date** fields, and then click **Update**.
5. If you wish to view the passwords associated with the listed jobs, select **Show Password**.
6. When you are finished viewing the distribution history, click **Exit**.

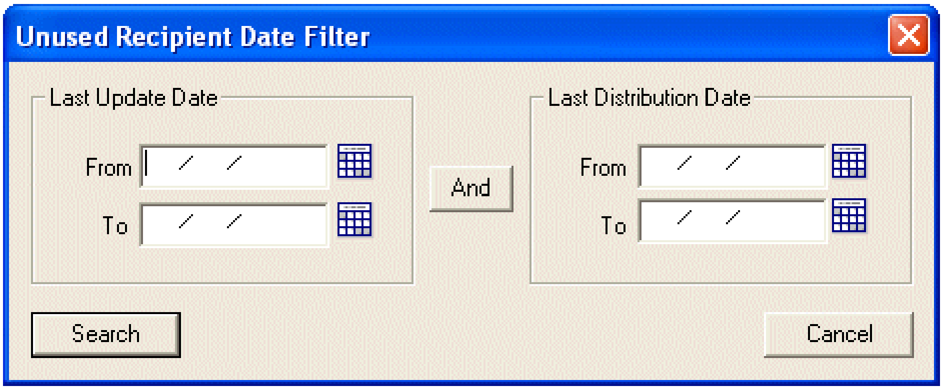
# Removing Unused Recipients

You can identify the users that currently have a distribution job in the distribution queue from ones that are not currently in use. In some cases, you may want to remove unused recipients from the system. To remove unused recipients:

1. In the **Customer Information** dialog box, click **Remove Unused Recipients**. The **Purge Unused Recipients** dialog box is displayed. The recipients that are currently a part of a distribution job within the distribution queue have the value **YES** in the **In Use** Column. The dialog box also lists the last time the recipient information was updated and the last time the recipient had a distribution take place.
2. Select the recipient that you want to remove.
3. Click **Delete**.
4. Click **Yes** to confirm the removal.

You can also search for recipients based on the last update date or the last distribution date. To search for recipients based on date:

1. Click **Search**. The **Unused Recipient Date Filter** dialog box is displayed.




2. Enter the appropriate date parameters.
3. You can toggle between **And** and **Or** to use as a logical operator between the two date parameters.
4. Click **Search**.

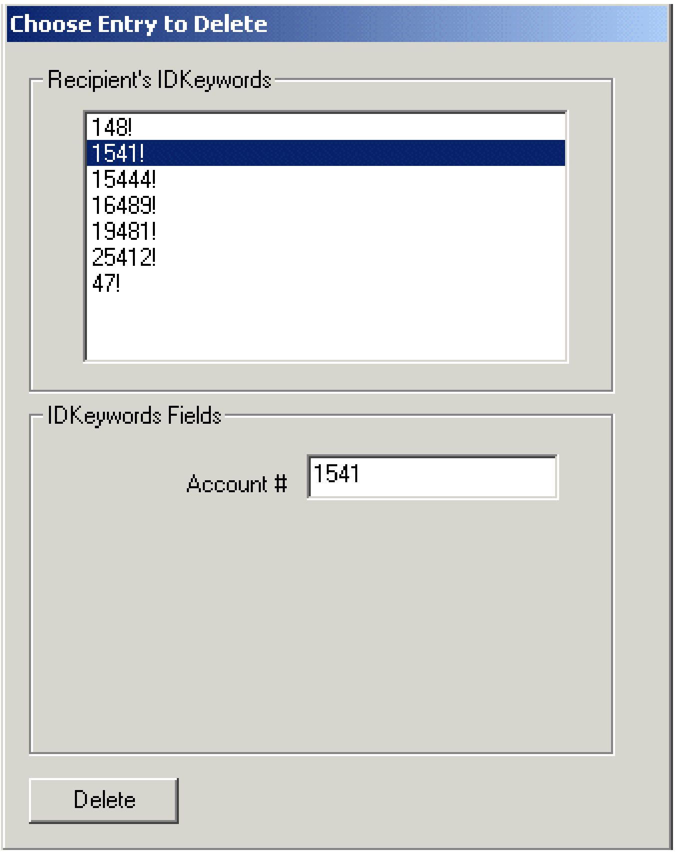
If you want to clear the search results and display all of the unused recipients, click **Clear** in the **Purge Unused Recipients** dialog box.

# Deleting a Recipient

To delete a recipient from the Customer Information dialog box:

1. Select **File | Customer Information**.
2. Select the appropriate **Distribution Process** or **Class of Service**.
3. Select the appropriate **Recipient Name**.
4. Click **Delete**.

5. A message asking **Are you sure you want to delete the currently selected customer?** is displayed. Click **Yes** to delete the customer. Click **No** to cancel the deletion process.
6. If you select **Yes**, a warning stating **You cannot remove this customer if they are involved in an incomplete transaction. It could take a couple of minutes to check if this is the case before performing the delete. Do you want to proceed?** Select **Yes** to proceed with the process. Select **No** to cancel the deletion process. If the customer is involved in an incomplete transaction, you will not be able to delete the customer.
7. If you selected **Yes** and if only one Customer ID keyword string exists for the customer, the deletion will be complete. If more than one Customer ID keyword string exists for the customer, the **Choose Entry to Delete** dialog box will display. Select the appropriate Customer IDKeyword to be deleted.




8. Click **Delete**.
9. A message asking **Are you sure you want to delete this customer?** is displayed. Click **Yes** to delete the customer. Click **No** to cancel the deletion process.

# Customer Importer Processor

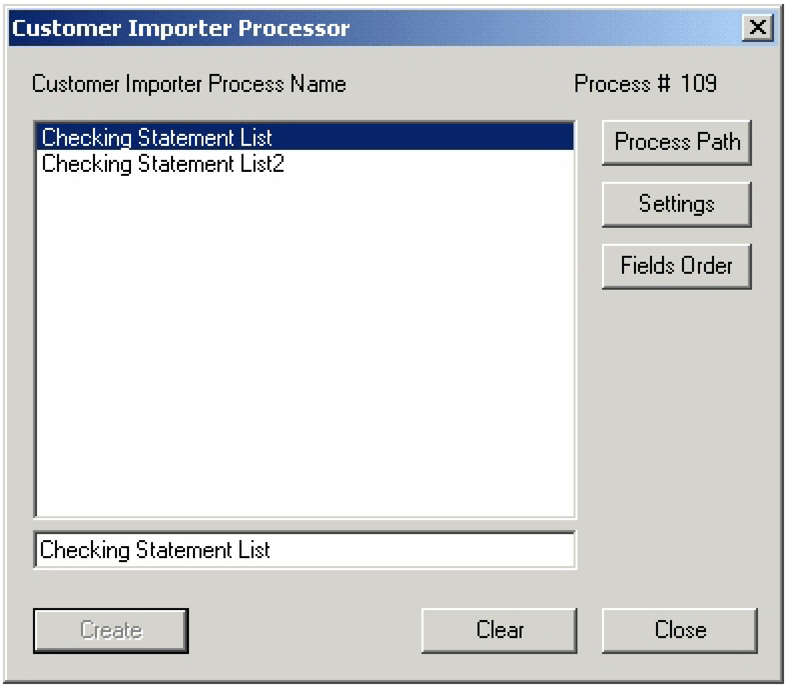
The Customer Importer Processor allows users to process customer information directly into OnBase. The Processor works in a similar fashion to DIP in which the user specifies how the file is separated and delimited and the field order of the data. The Processor also has the functionality to handle “global” values, i.e. processing new customer information with a unique value that is not part of the file (such as each customer will have their statement distributed with the same delivery template). Processors can also be established to modify data stored in OnBase or delete data stored in OnBase.

## Configuring the Customer Importer Processor

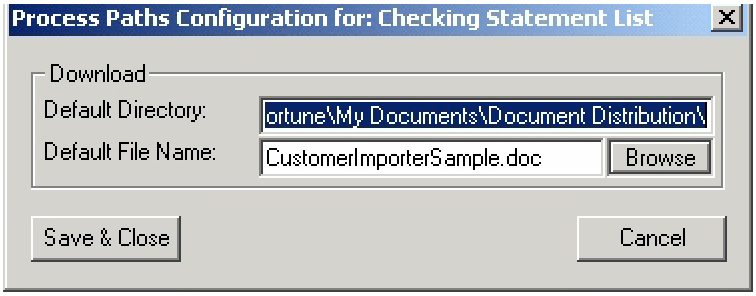
You can configure the Customer Importer Processor to import customer information to use when distributing documents.

To configure the Customer Importer Processor:

1. In the Configuration module, select **Import | Customer Importer Processor** from the menu bar. The **Customer Importer Processor** dialog box appears.
2. Enter name of new processor and click **Create**.



3. Highlight the customer importer process name and click the **Process Path** button to display the **Process Paths Configuration** dialog box.

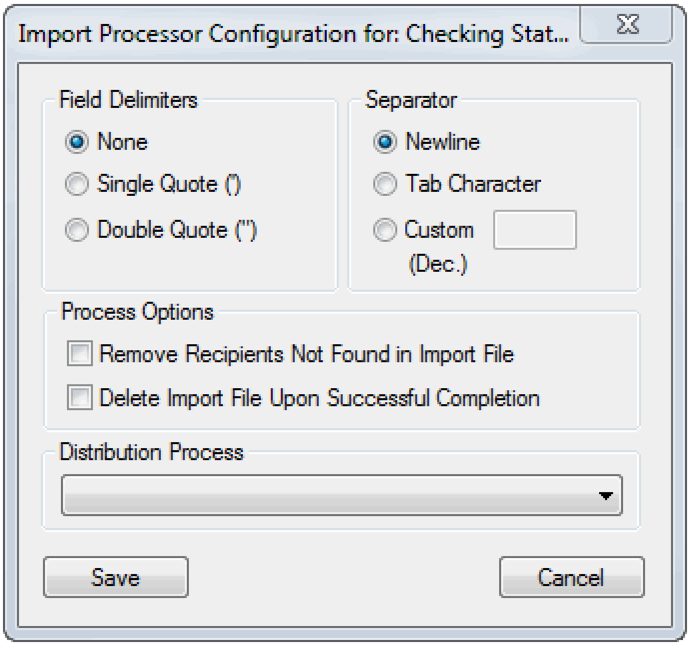



4. Use the **Browse** button to navigate to the file from the **Choose a File to Process** dialog box, select Open to fill the **Default Directory** and **Default File Name** fields of the **Process Paths** dialog box.

**Note:** The **Default File Name** may include the standard ? and * wildcards to specify more than one file to process.

5. Click **Save & Close**.

6. Click the **Settings** button to display the **Import Processor Configuration** dialog box.




| Setting | Description |
|---|---|
| **Field Delimiters** | Define the character that encloses each field value in the customer information file.<br>• **Single Quote:** '596 Main St.','Minneapolis, MN 59634'<br>• **Double Quote**: "596 Main St.","Minneapolis, MN 59634"<br>• **None:** 596 Main St.,Minneapolis, MN 59634 |
| **Separator** | Define the character that separates each field value in the customer information file.<br>• **Newline**: each field appears on a separate line.<br>• **Tab:** each field is separated by a tab character.<br>• **Custom:** each field is separated by the specified character. In the text box, place a specific character, or use a '\' (back slash) and the ASCII code for the character in decimal format. For example, if a dollar sign separates the fields, input '$' or '\36' in the text box. |

| Setting | Description |
|---|---|
| **Process Options** | Select **Remove Recipients Not Found in Import File** to remove all recipients not found in the index file from the database. This includes recipients that belong to other Distribution Processes.<br>**Caution:** Only select this option when the index file is a comprehensive recipient list.<br>Select **Delete Import File Upon Successful Completion** to have the source file deleted after successful Customer Importer Processor batch completion. |
| **Distribution Process** | Select the Distribution Process with which the Customer Information record will be stored in the database. |

7. Click **Save & Close**.
8. Click the **Fields Order** button to display the **Customer Importer Field Configuration** dialog box. The list of keywords in the drop-down list correspond to fields in the **Customer Information [recipient name]** dialog box in the OnBase Client. You can use any character to activate the **Distribution Options** check boxes and radio buttons.

| Setting | Description |
|---|---|
| **>>Add Customer** | Adds the record to the database and checks the **>>Customer Unique ID** to prevent duplicate records from entering the database. |
| **>>Address1 >>Address2 >>Address2 Line2 >>Address3** | Populates the 4 address lines in the **CD Distribution** section with the information specified. |
| **>>Class of Service Name** | The name representing the class of service to assign to this file of customers. This can be obtained by going to **Printing \| Document Distribution**. |
| **>>Class of Service Number** | The number representing the class of service to assign to this file of customers. This can be obtained by going to **Printing \| Document Distribution**. Highlight the **Distribution Process** configured with the class of service, click **Class Of Service**. Highlight the class of service and the number is displayed at the top of the **Distribution Process Settings** dialog box. |
| **>>Customer Name** | Populates to the **Recipient Name** in the **Customer Information** dialog box. |

| Setting | Description |
| --- | --- |
| **>>Customer Unique ID** | Populates to the **Customer Info Importer Unique ID** in the **Customer Information** dialog box. One Customer ID may be used for multiple distribution processes.<br>**Note:** This is a required field. |
| **>>Delete Customer** | Removes the record with the corresponding **Customer Unique ID** from the database. |
| **>>Delivery Template Name** | Populates the **Fax and/or Email Cover Sheet** drop-down with the **Delivery Template** specified (by name). This can be obtained by going to **Client \| Document Distribution \| Delivery Template**. |
| **>>Delivery Template Number** | Populates the **Fax and/or Email Cover Sheet** drop-down with the **Delivery Template** specified (by number). This can be obtained by going to **Client \| Document Distribution \| Delivery Template**. |
| **>>Distribute as CD** | Enables the **Published CD Distribution** check box. |
| **>>Distribute as Email** | Enables the **Email Distribution** check box. |
| **>>Distribute as Fax** | Enables the **Fax Distribution** check box. |
| **>>Distribute as Notification** | Enables the **Email Notification** check box. |
| **>>Distribute as Printed** | Enables the **Send to Printer** check box. |
| **>>Dummy Key** | Can be used to represent any fields that should be ignored during import. |
| **>>Email Address** | Populates the **Email Distribution** section. |
| **>>Fax Number** | Populates the **Fax Distribution** section. |
| **>>Greeting Name** | Populates the **Customer Greeting Name** field. |
| **>>Include Complete Transaction** | Enables the **Include All Deposit Items with Deposits** check box. Use any character for this field. |
| **>>Institution Name** | Associates the recipients with the institution specified (by name). Get the institution number from **Configuration \| Utils \| Institution Names**. |
| **>>Institution Number** | Associates the customers with the institution specified (by number). Get the institution number from **Configuration \| Utils \| Institution Names**. |
| **>>Modify Customer** | Validates that the record exists by checking the **Customer Unique ID** before making the configured changes. |

| Setting | Description |
|---|---|
| **>>Modify or Add Customer** | Examines the **Customer Unique ID** and adds the record if modified; if the ID does not exist, the record is added. |
| **>>Number of CD Copies** | Populates the **Copies** edit field with the number specified. |
| **>>PDF Password** | Populates the **Password** edit field with the string for the **Encrypted PDF** or the **128-bit Encrypted PDF Attachments**.<br>**Note:** This password overrides the **PDF Encryption Owner Password** in OnBase Configuration. |
| **>>Use 128-bit Encrypted PDF Attachment** | Enables the **128 bit encrypted PDF** distribution option. |
| **>>Use Encrypted PDF Attachment** | Enables the **Encrypted PDF** distribution option. |
| **>>Use PDF Attachment Format** | Enables the **PDF** distribution option. |
| **>>Use RTF Attachment Format** | Enables the **RTF** distribution option. |
| **>>Use Native Attachment Format** | Enables the **Native Format** distribution option. |
| **Customer Identification Keywords/Customer ID Keywords** | Customer ID Keywords to match rendered documents to the distribution process complete the drop-down list. These keywords are not preceded with **>>**. |

You can add the keywords in any order; the only requirement is that the Order number corresponds to the field's position in the file.

## To add keywords:

1. Select a keyword type from the **Keyword Type** drop-down list, enter the **Order** number and click **Add**.

**Note:** The order number must be between 1 and 255.

2. Continue adding all of the keyword types with the corresponding number until all the keywords that appear in the file have been configured.
3. If a global value is used, select the **Global** check box and enter the global default value in the **Default Value** field.

4. Click **Close** when all the keywords are configured.
5. If you add a keyword type with an order number that is already in the keyword list, you will get an **Error** message box stating that **Two keywords cannot have the same order number**. If this happens, click **OK** then delete the keyword from the list with the order number matching the one you are trying to add; try adding the keyword again.

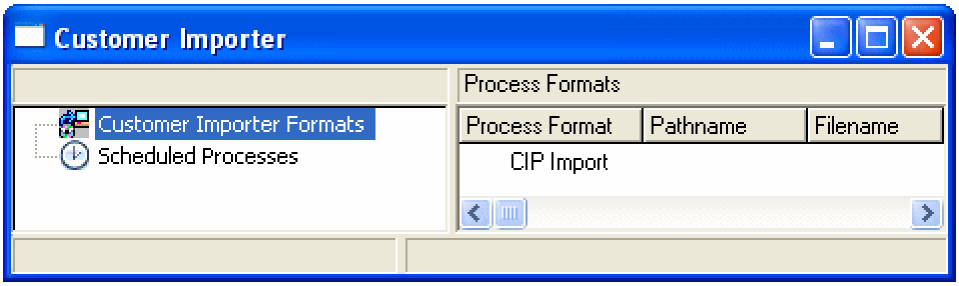
## To delete keywords:

1. To delete one of the keywords from the list, or if you configured the wrong keyword type, highlight the keyword type in the list and select **Remove**.
2. A single uniform value can automatically be supplied for any keyword by checking the **Global** check box and supplying the desired value in the **Default Value** field. The **Default Value** field can be used by itself to provide the designated value for any null keyword values extracted from the customer information file.

**Note:** The import file must include a **>>Unique Customer ID** keyword and a record status keyword (**>>Add Customer**, **>>Modify Customer**, **>>Delete Customer**, **>>Add or Modify Customer**), so the system knows how to treat the record. Any alphanumeric value can be used in the customer import file to represent the ID and status keywords.

## To initiate a Customer Information Import process:

1. In the OnBase Client, select **Admin | Document Distribution | Customer Importer** at the menu bar. The Customer Importer window opens.




2. Select the Customer Importer Processor to be executed. Right-click and select **Execute Import Process**.
3. Check the **SYS Verification Report** for errors or messages.

# Configuring Document Distribution for Non-Image Statement Documents

Documents can be distributed in an ad hoc manner via a right-click menu option. This type of distribution does not require the Image Statements module. If you want to distribute documents that are not associated with the Image Statements module, there are a few requirements. The requirements are:

- Customer Information must be configured for recipients of the distribution. This configuration must include a Customer ID Keyword value that will be used to identify recipients for delivery. For more information, see Configuring a Recipient on page 66.
- The value associated with the Customer ID Keyword for a recipient must be on each applicable distributed document in order for the distribution to reach that recipient.
- Appropriate Distribution Processes must be configured and will be available for selection in the OnBase Client. For more information, see Configuring a Document Distribution Process on page 56.

# Scheduling Overview

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

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

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

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

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

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

# Configuring & Using the Scheduler

## Requirements for Configuring/Running a Scheduled Process

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

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

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

## Using the -SCHED and -SCHEDINST Switches

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

### -SCHED

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

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

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

### -SCHEDINST

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

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

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

---

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

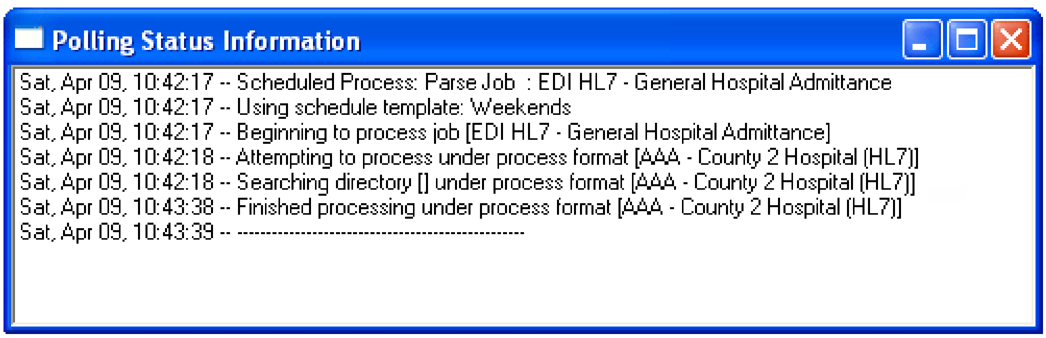
---

# Verifying the Scheduler is Running

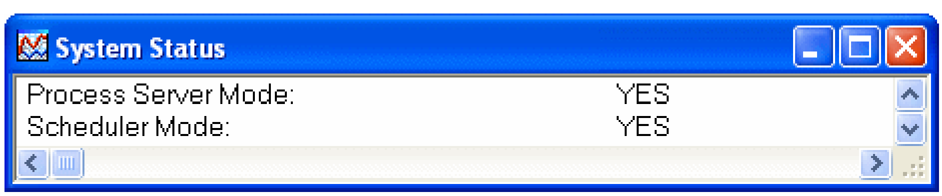
To verify that the Scheduler is running on the processing workstation, click **Window | Polling Status Information** in the OnBase Client.

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

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




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




# Running Multiple Scheduled Processes

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

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

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

# Scheduled Process Configuration Reports

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

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

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

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

# Working With Process Formats

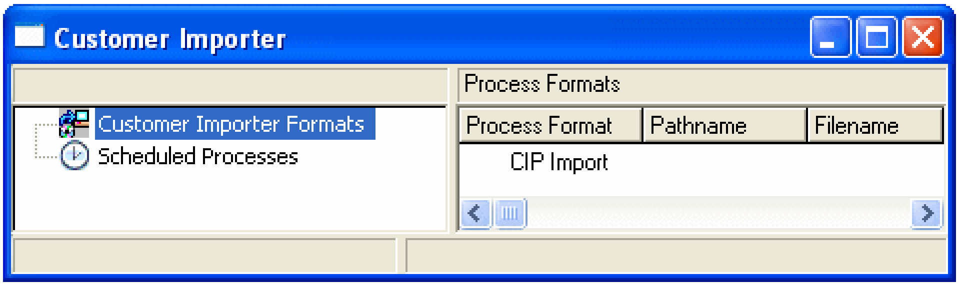
A Process Format is used in processing modules and in scanning modules to specify how OnBase processes data being imported into OnBase. A Process Format is, basically, one individually-configured process.

## Creating a Scheduled Process Format

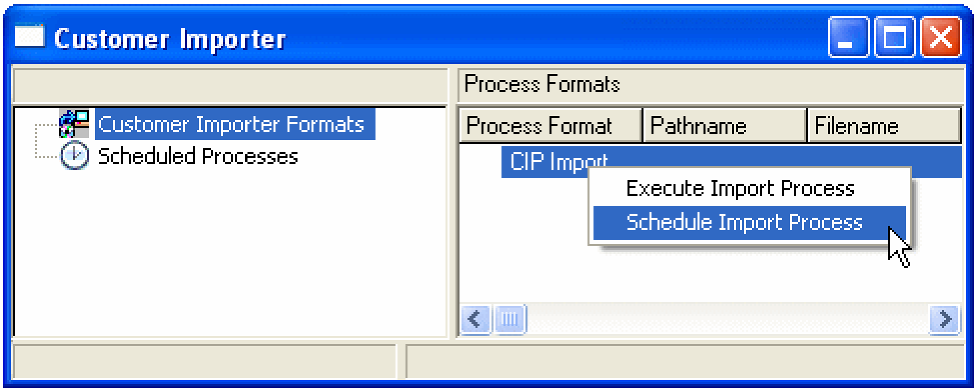
You can add a format to the Scheduler from its process queue by selecting the process format and selecting **Schedule Import Process** from the right-click menu.

For example:

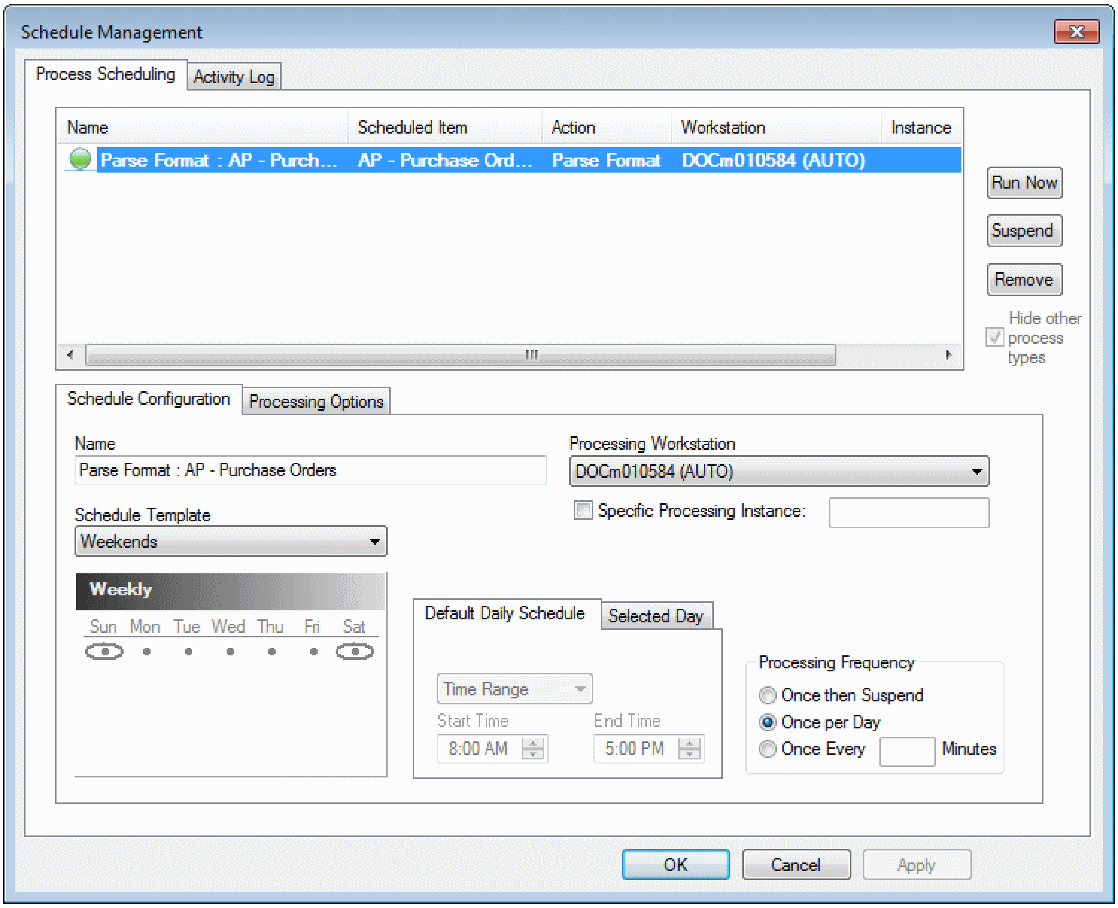
In the OnBase Client, click **Admin | Document Distribution | Customer Importer**. The **Customer Importer** window is displayed.




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



The **Schedule Management** window is displayed.




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

By default, all scheduled Process Formats (e.g., COLD Process Formats, DIP Process Formats, etc.) are displayed in the **Scheduled Items** box when scheduling a new Process Format. For information on viewing only the Process Formats for the currently-selected process type, see Viewing Scheduled Processes on page 119.

## Schedule Configuration

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

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

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

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

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

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

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

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

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

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

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

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

### *Calendar*

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

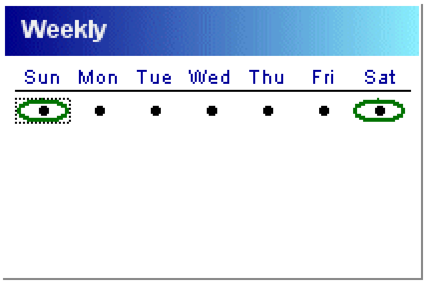
**Note:** The calendar is displayed based on your Workstation Regional Settings and the OnBase language DLL that you are using.

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

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

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

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

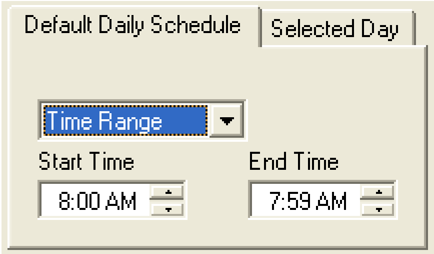


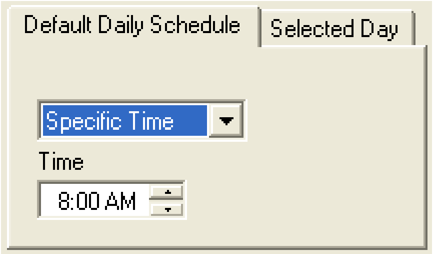

**Note:** In the example above, two days are selected but **Sunday** is the currently-selected day.

To deselect a day, double-click it.

### *Default Daily Schedule*

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



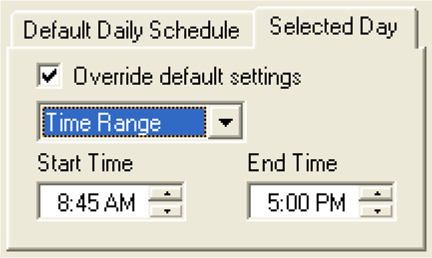



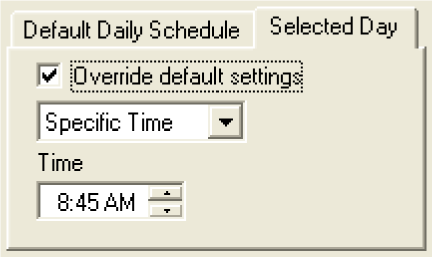
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is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

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

### *Selected Day*

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



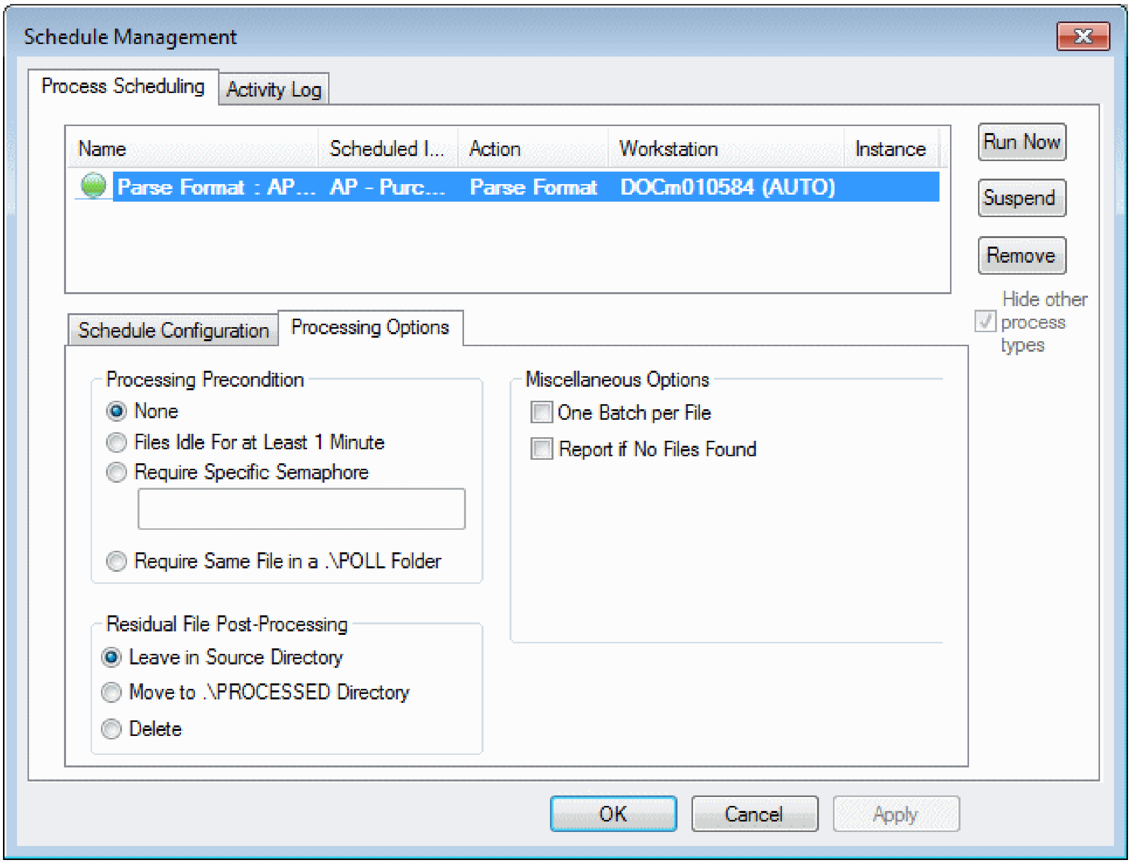

The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is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

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

## Processing Options

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

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



2. Set the following Processing Options.

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

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

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

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

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

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

## Viewing Scheduled Processes

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

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

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

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

## Modifying a Scheduled Process Format

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

To modify an existing scheduled process:

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

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

   For more information on the options on these tabs, see Schedule Configuration on page 110 and Processing Options on page 132.

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

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

## Deleting a Scheduled Process Format

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

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

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

## Running/Suspending a Scheduled Process Format

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

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

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

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

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

3. Click **Apply**.

# Working With Process Jobs

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

A few notes about Process Jobs:

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

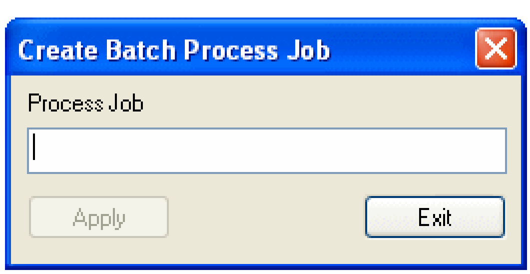
## Creating a Job

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

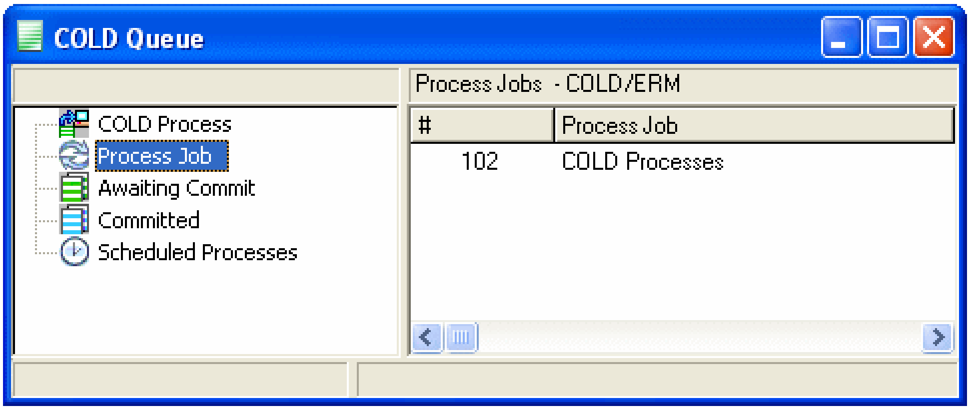
To create a job, follow these steps:

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

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



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




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

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

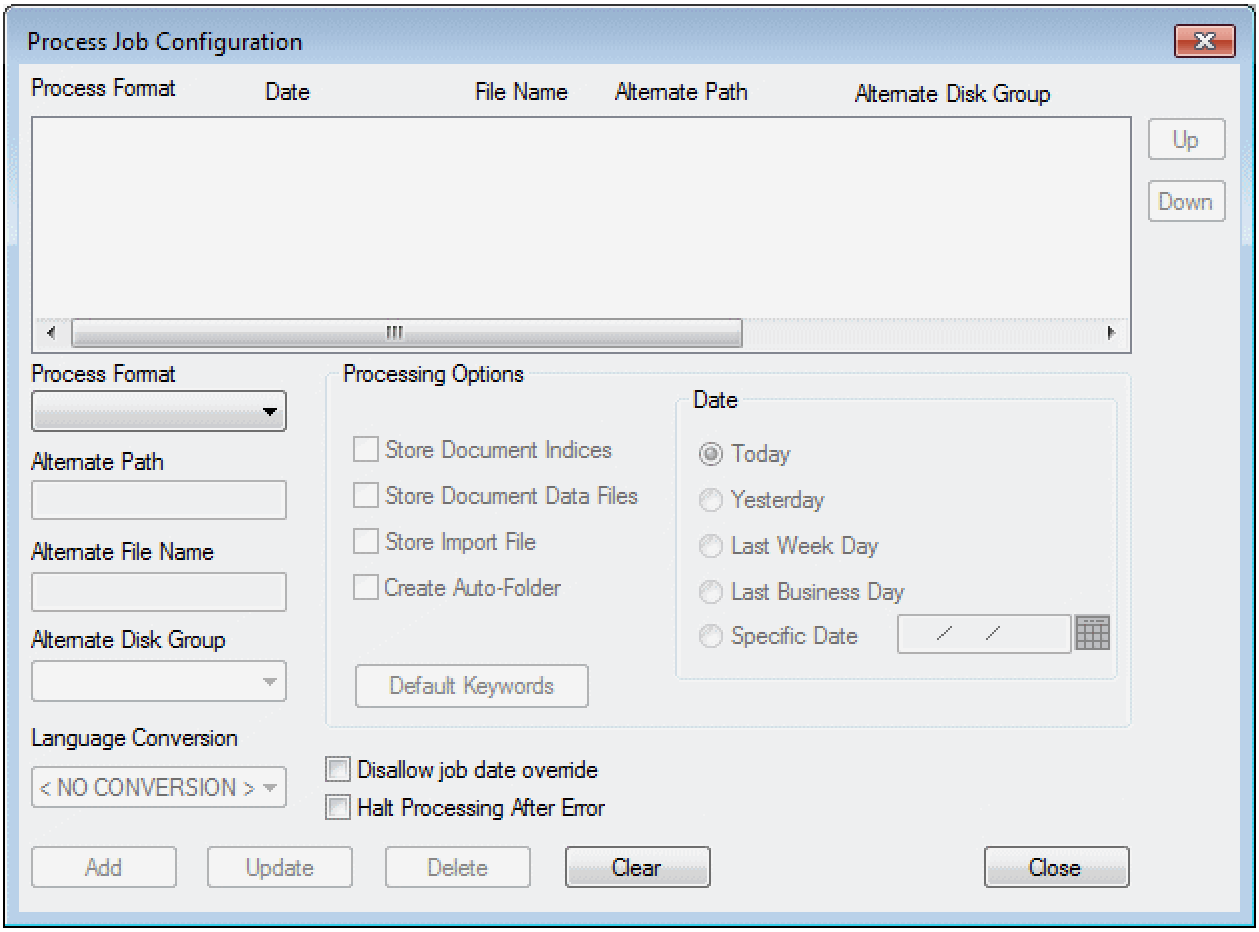
## Configuring a Job

To configure a job:

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

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

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




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

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

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

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

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

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

## Scheduling a Job

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

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

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

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

## Schedule Configuration

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

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

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

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

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

   To create a custom schedule, you will need to use the **Calendar** to select the day(s) you would like the scheduled job to run on and then you will need to specify the time the scheduled job will run using the **Default Daily Schedule** and/or **Selected Day** tabs. For more information, see those sections below.
4. Select how often you would like the scheduled job to run by selecting one of the **Processing Frequency** radio buttons.
   - **Once then Suspend**. The scheduled item will be processed once, then the scheduled process is suspended.
   - **Once per Day**. The scheduled item be processed once per day.

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

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

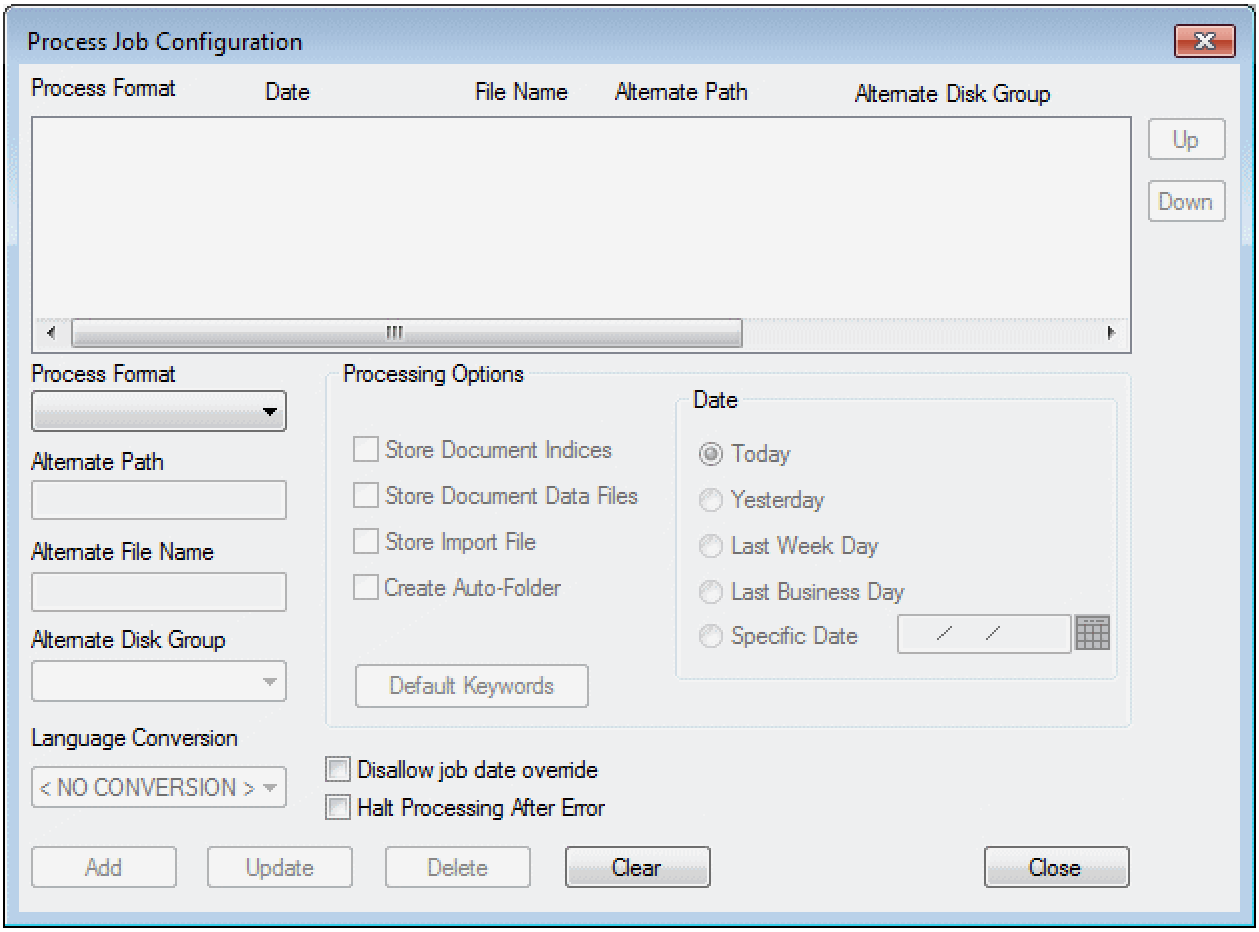
### Calendar

To configure a job:

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

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

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




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

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

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

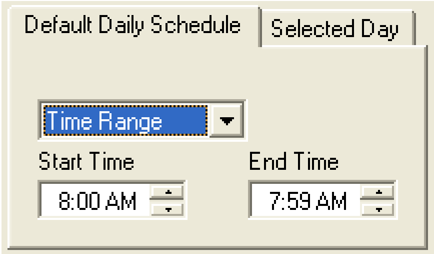
3. Click **Add**.
4. Repeat Step 2 for each process format that you would like to add to the job.

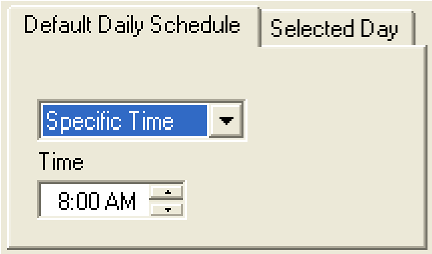
   Process jobs are run in the order in which they display on the screen. Re-sequence a job by selecting it and clicking the **Up** or **Down** buttons.

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

### *Default Daily Schedule*

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



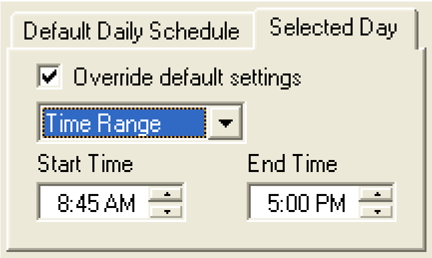



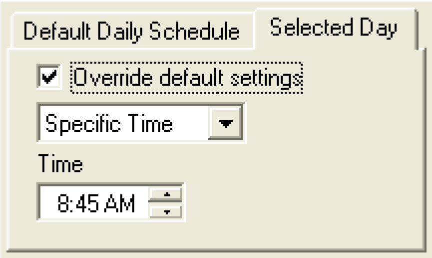

The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is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

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

### *Selected Day*

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






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

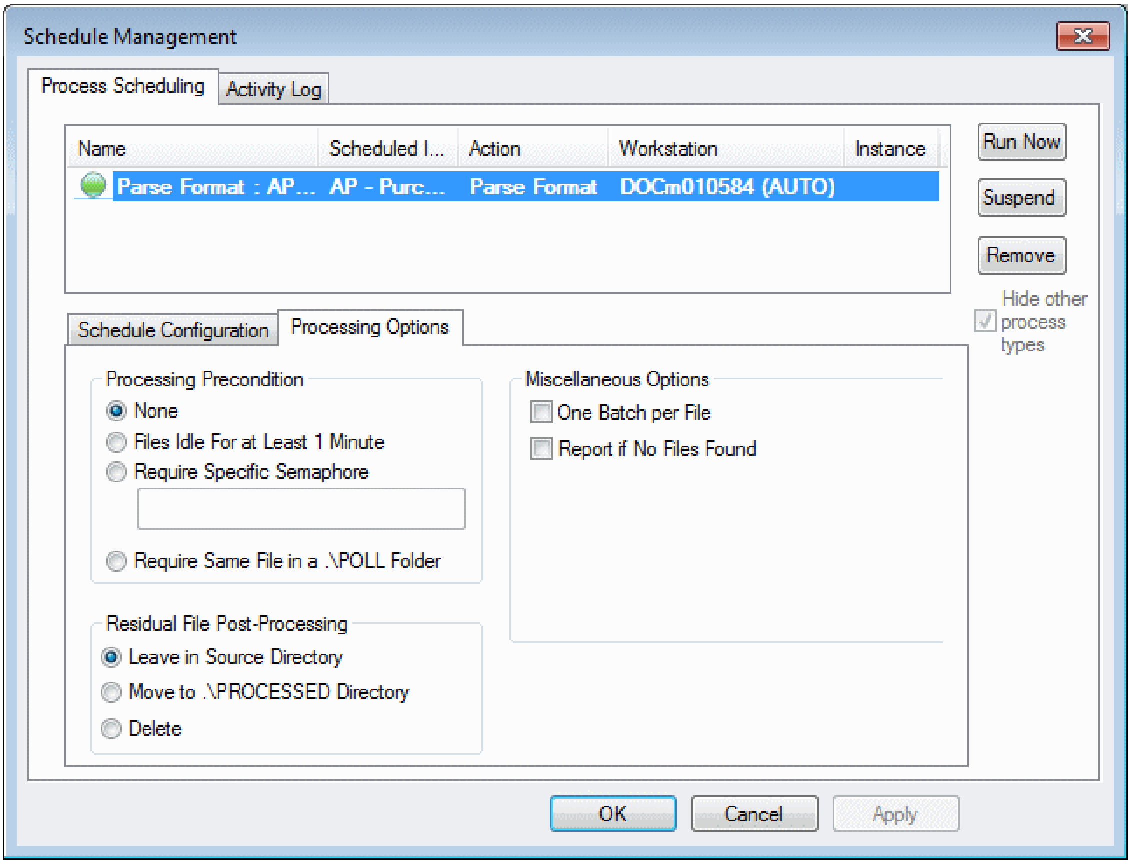
**Tip:** Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

## Processing Options

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

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

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



2. Set the following Processing Options.

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

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

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

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

## Viewing a Job

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

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

To open the **Schedule Management** window:

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

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

# Modifying a Job

To modify an existing job:

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

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

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

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

**Note:** For more information on configuring a process job, see Configuring a Job on page 123 and Scheduling a Job on page 125.

## Renaming a Job

To rename an existing job:

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

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

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

# Deleting a Job

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

To delete an existing job:

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

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

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

## Running/Suspending a Job

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

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

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

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

3. Click **Apply**.

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

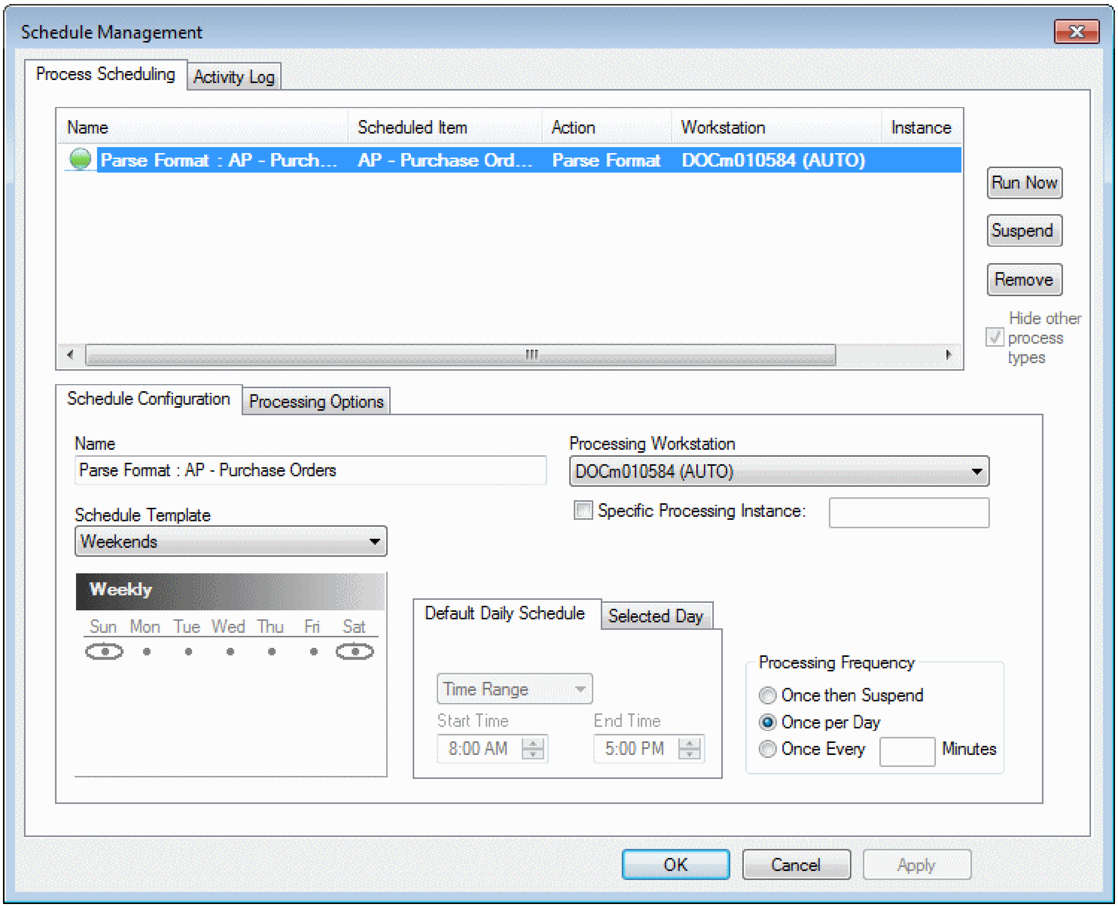
From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Process Job**.

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

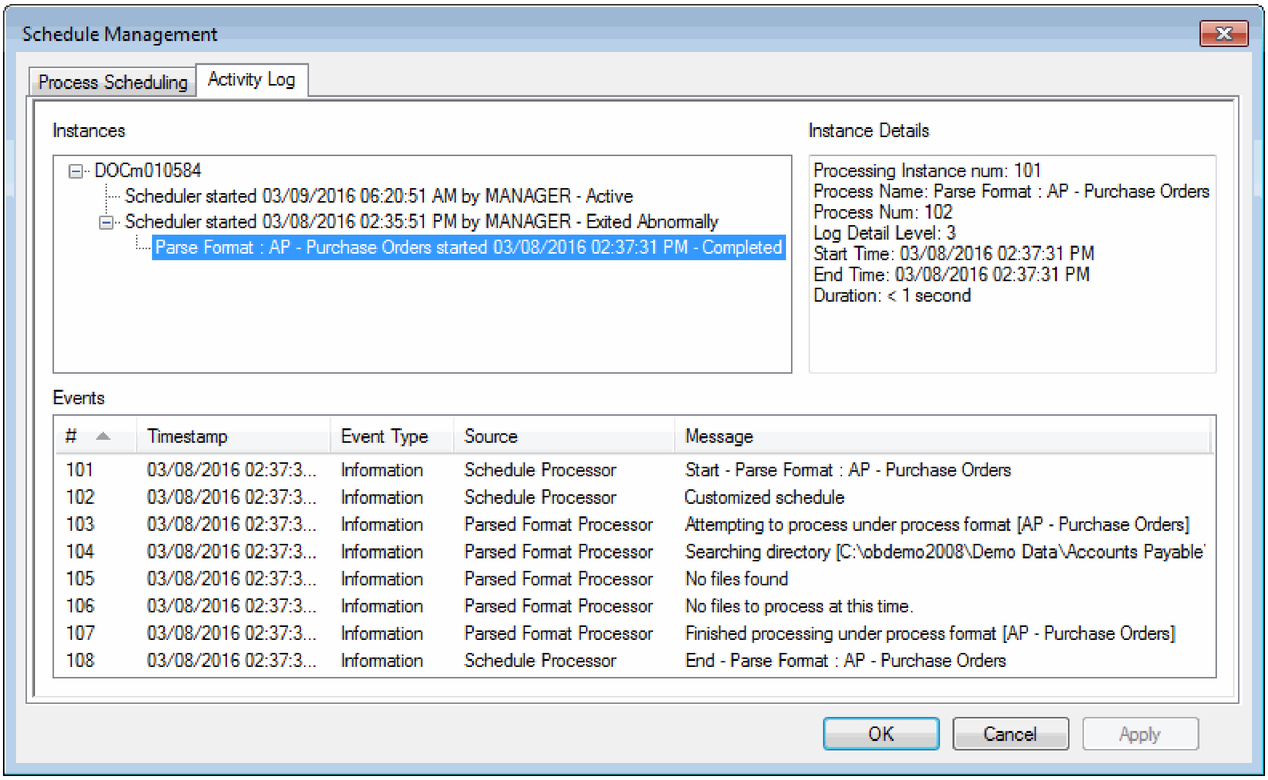
# Viewing the Activity Log

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

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



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




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

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

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

# Creating Schedule Templates

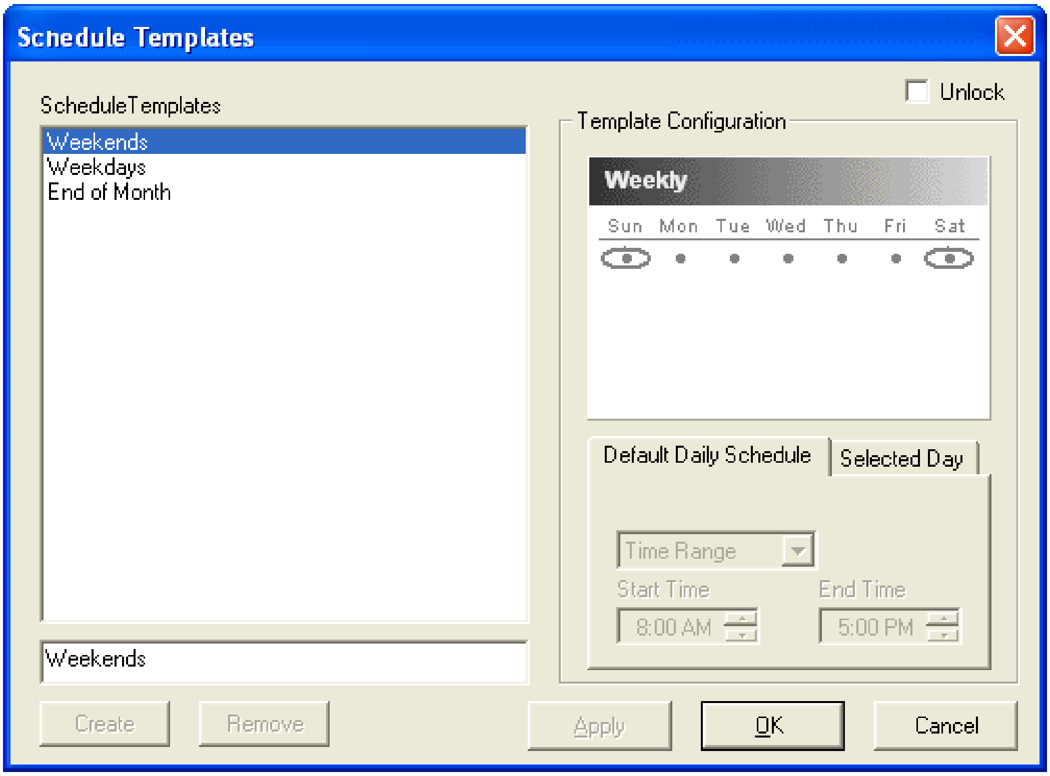
## Creating Schedule Templates

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

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

To create a schedule template:

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




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

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

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

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

### Calendar

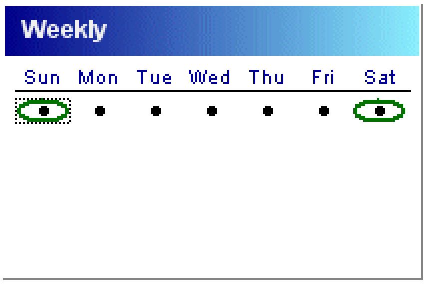
The calendar is used to select the day(s) on which a scheduled process should be run.

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

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

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

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

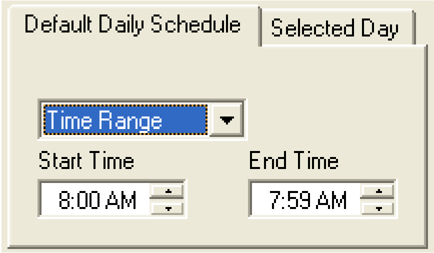


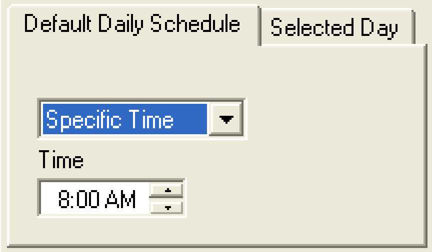

**Note:** In the example above, two days are selected but **Sunday** is the currently-selected day.

To deselect a day, double-click it.

### Default Daily Schedule

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



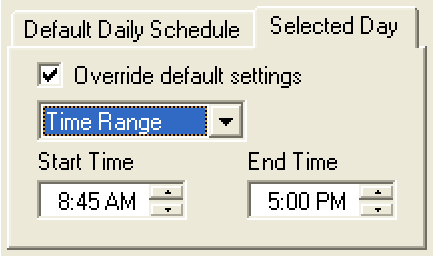



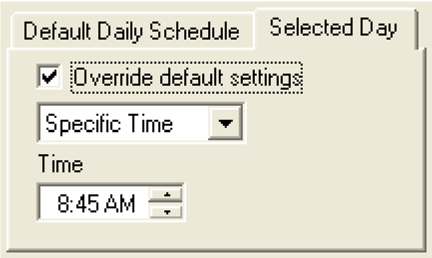

The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is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

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

### *Selected Day*

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



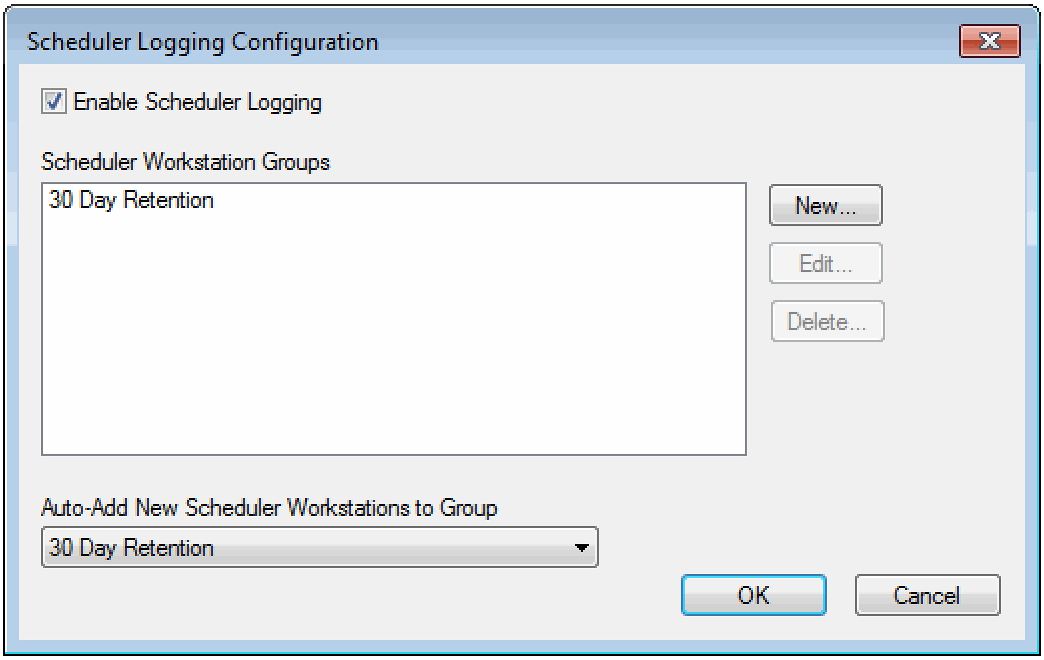



The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is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

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

# Configuring Schedule Logging

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




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

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

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

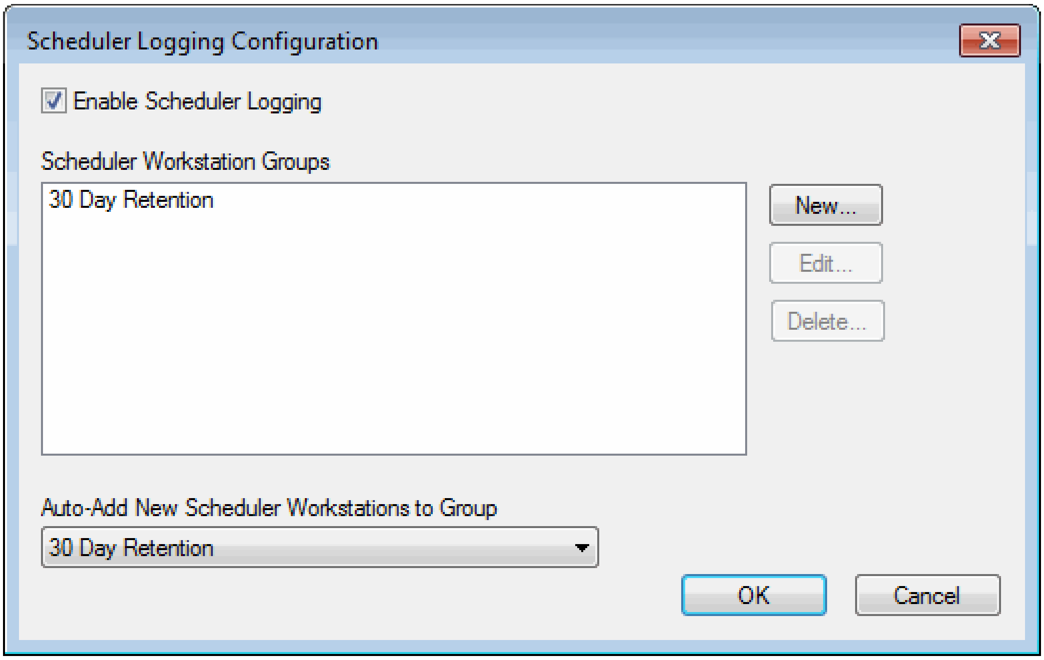
- See Creating a Scheduler Workstation Group on page 145 for more information on creating a new scheduler workstation group.
- See Editing a Scheduler Workstation Group on page 148 for more information on editing a scheduler workstation group.
- See Deleting a Scheduler Workstation Group on page 151 for more information on deleting a scheduler workstation group.

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

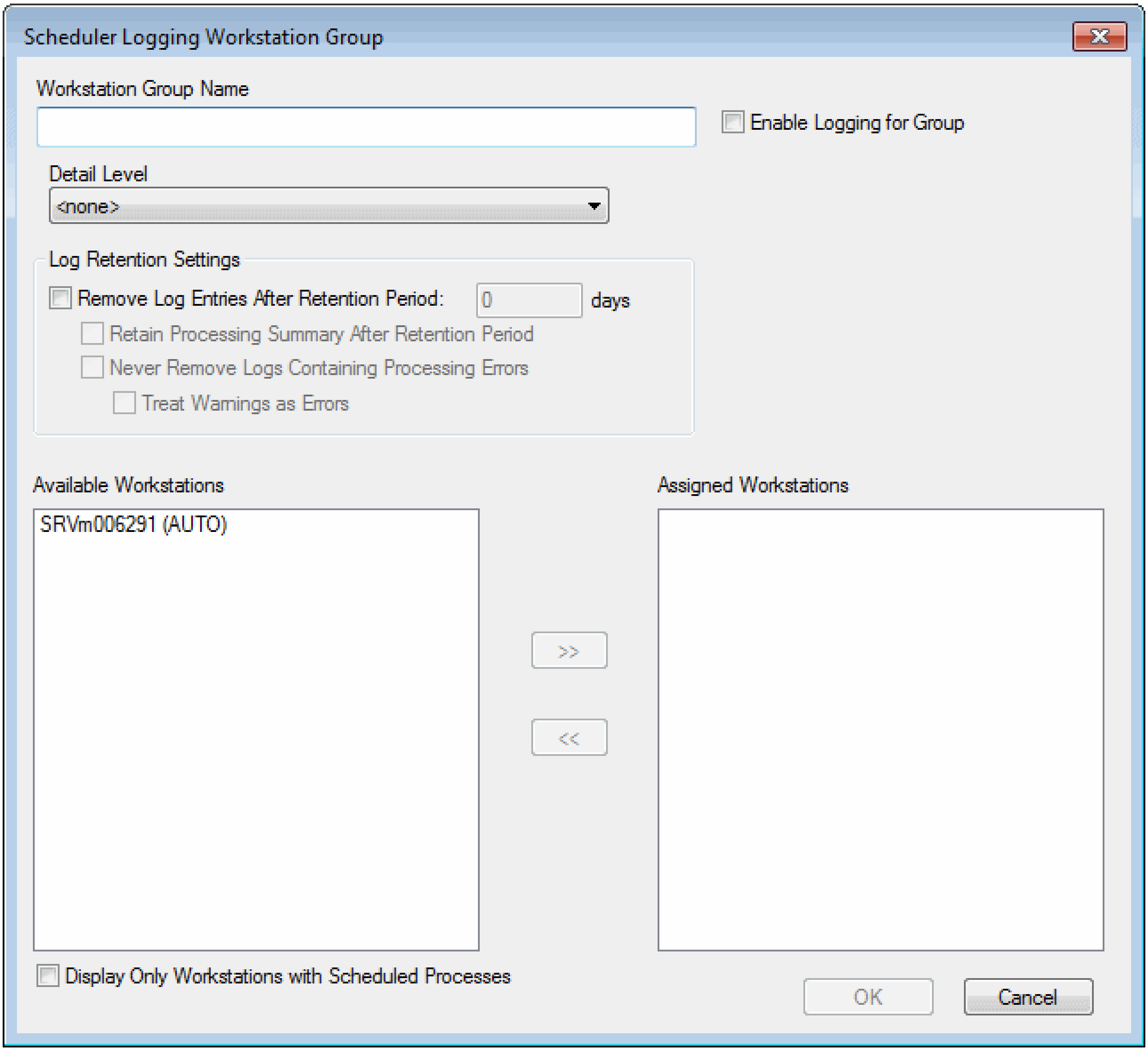
## Creating a Scheduler Workstation Group

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

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



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




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

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

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

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

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

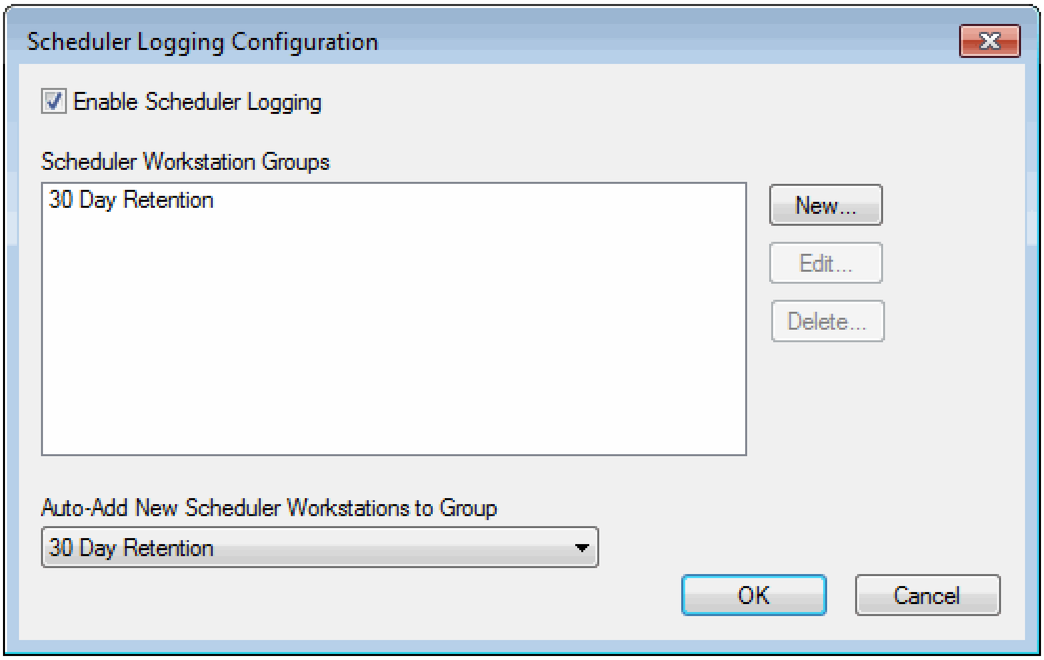
**Tip:** You can select the **Display Only Workstations with Scheduled Processes** option to limit the list of **Available Workstations** to those workstations that have scheduled processes assigned to them.

8. Click **OK**.

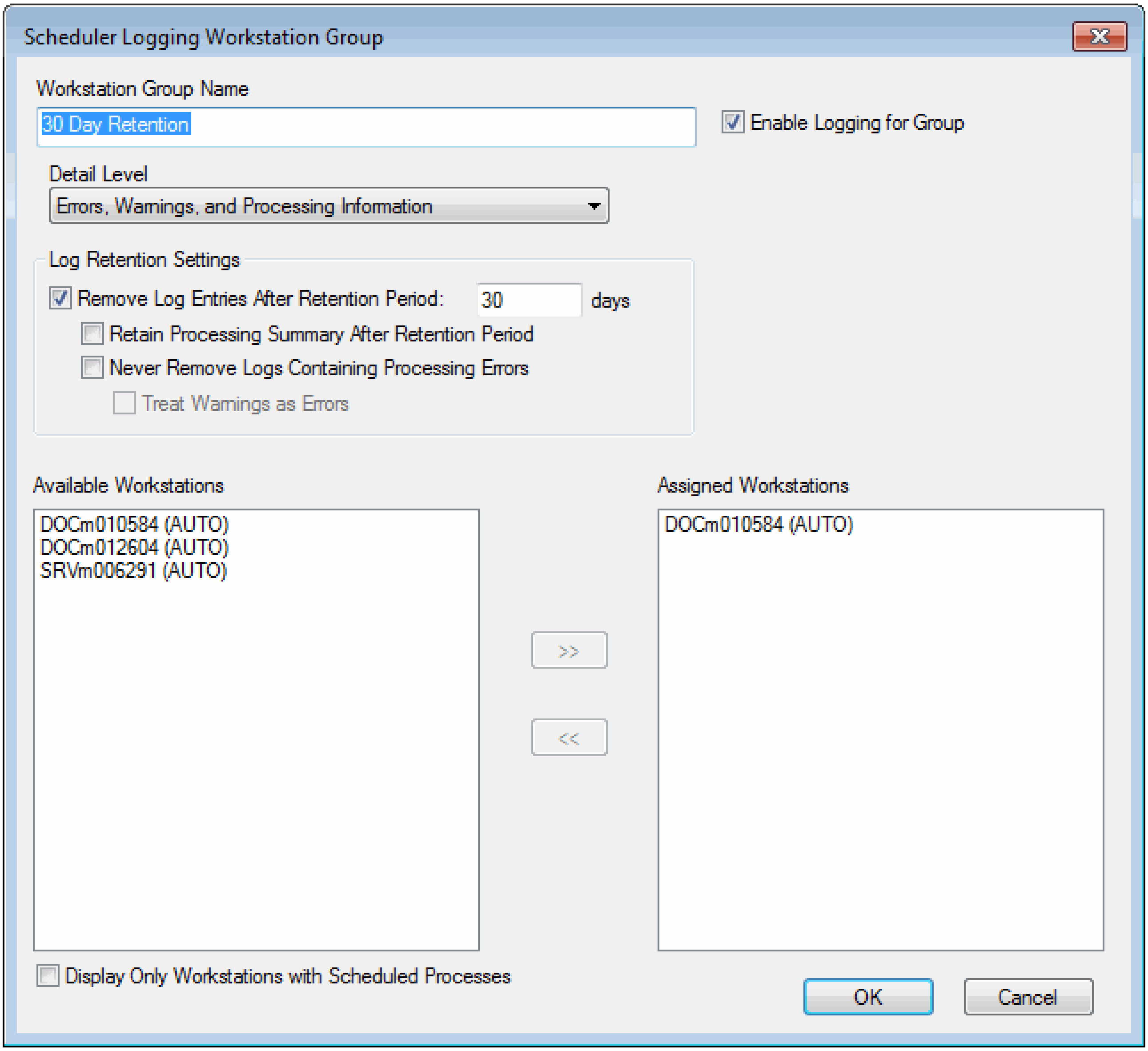
## Editing a Scheduler Workstation Group

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

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



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



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

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

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

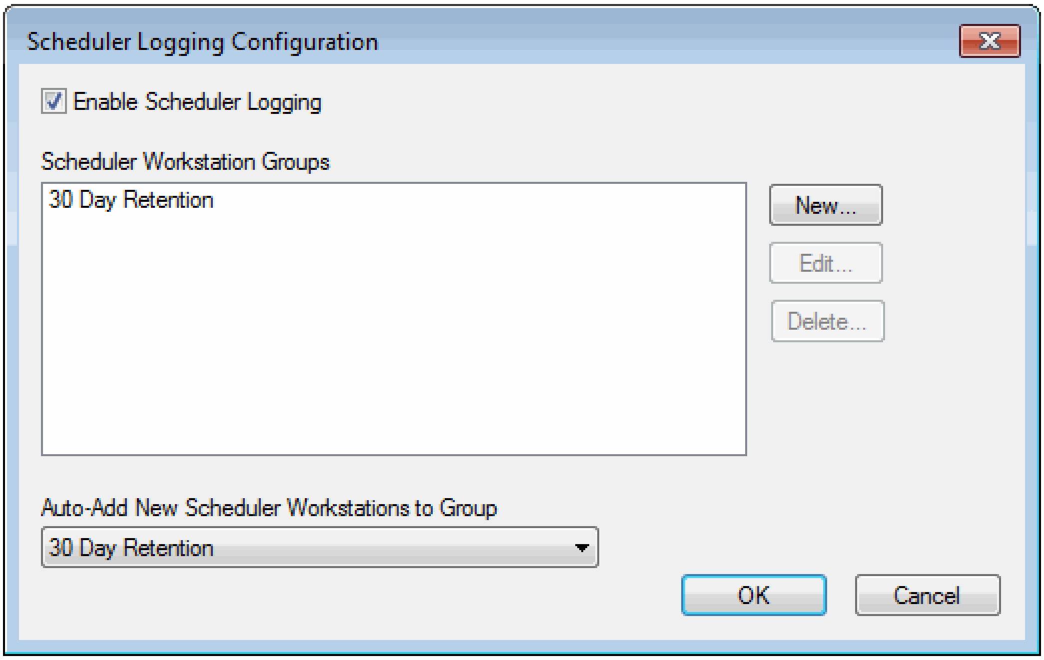
**Note:** After making a change to any of the options under **Log Retention Settings**, previously retained logs are rechecked to verify that they conform with the new settings. Logs which do not will be removed. For example, if you had previously configured the scheduler workstation group to **Retain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

4. Click **OK**.

## Deleting a Scheduler Workstation Group

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

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

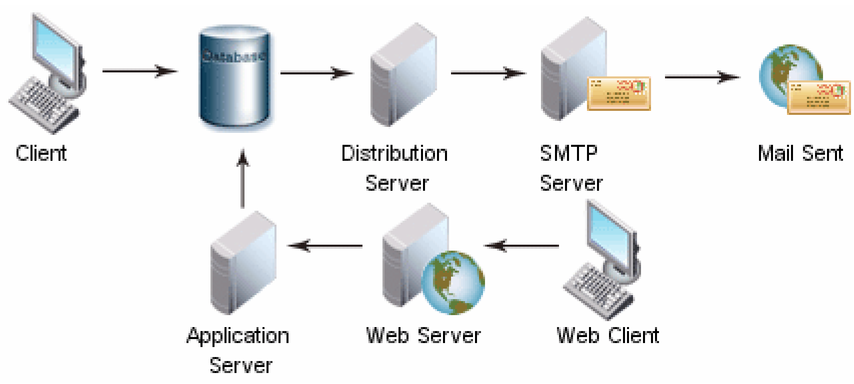



2. Select a scheduler workstation group and click **Delete**. A confirmation dialog box is displayed.
3. Click **Yes**. The selected scheduler workstation group is deleted, and any workstations that were assigned to that group are available to be added to another scheduler workstation group.

# Overview

The Distribution Service is a Core Services component that integrates with several OnBase modules, allowing email notifications to be sent through a centralized mail service. All installation and configuration settings are located on one workstation as opposed to several workstations. This provides high security, control, and easy maintenance.

The Distribution Service process is depicted in the following illustration. The process begins when OnBase Client applications send system notifications to the database. The Distribution Service polls the database on a configured interval and composes an email when it receives a new notification. The service then sends the email to an SMTP server, where it is distributed externally to all users who are configured to receive notifications from modules that use the Distribution Service. When OnBase documents are attached to these emails, attachment names reflect the documents' Auto-Name strings in OnBase.




The Distribution Service can run on a machine separate from that of the Application Server.

## Using the Distribution Service with Document Distribution

If you are upgrading from a version of OnBase prior to OnBase 15, and you are using the Distribution Service with Document Distribution, new configuration steps are required. If your system is configured with the Global Client Setting **Use Email Distribution Service for Document Distribution** enabled, a temporary file cache must be configured and associated with the Distribution Service.

See Configuring a Temporary File Cache on page 173 for more information.

**Note:** When the **Use Email Distribution Service for Document Distribution** setting is enabled and the **-STMTMAILSRVR** switch is applied to the OnBase Client shortcut, the OnBase Client will not check for bounce backs.

# Configuration

There are several items that need to be configured to allow the Distribution Service to function properly. These items include:



**Note:** If you are using multiple databases, each database must have the Distribution Service Settings configured individually.

## Configuring the Email Sending Unity Scheduler Task

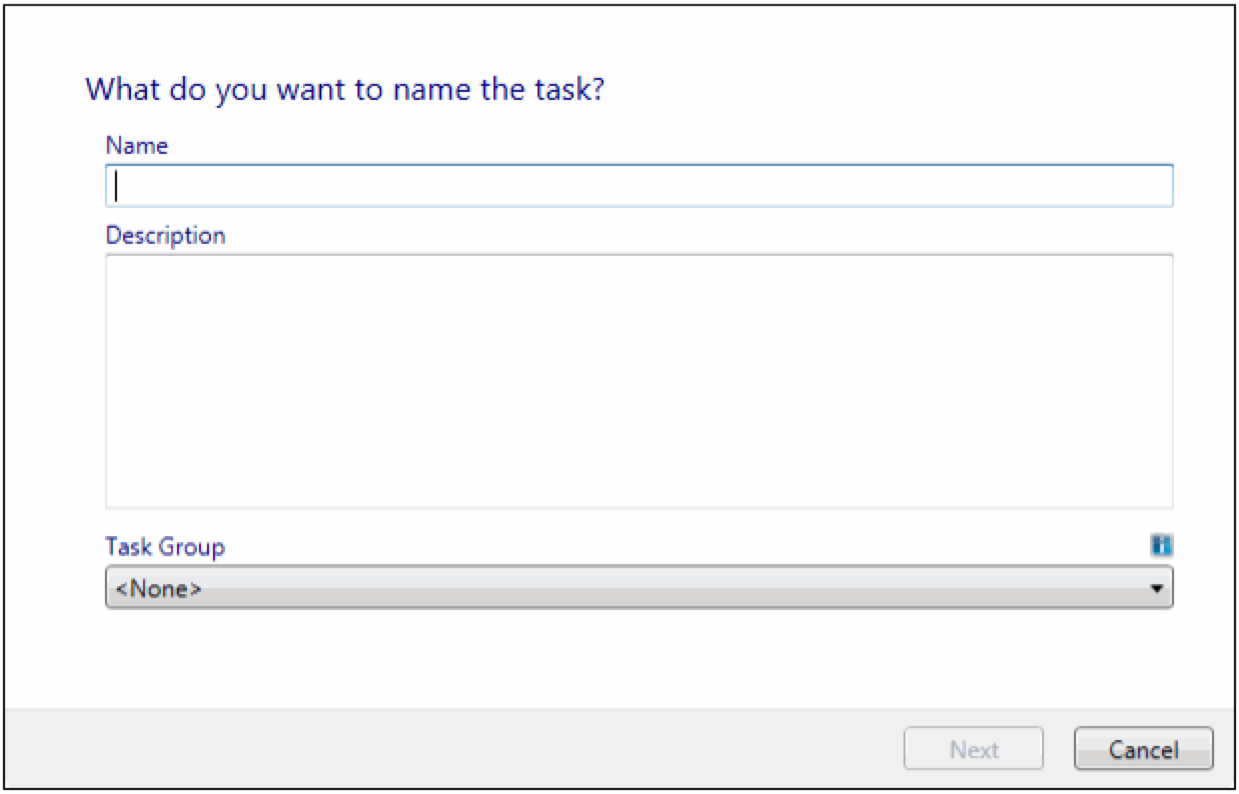
In order for the Distribution Service to function properly, a corresponding **Email Sending** Unity Scheduler task must be created and configured.

The following sections provide general instructions for creating Unity Scheduler tasks in the Unity Management Console. For more information on the Unity Scheduler, see the **Unity Scheduler** module reference guide.

## Creating Tasks

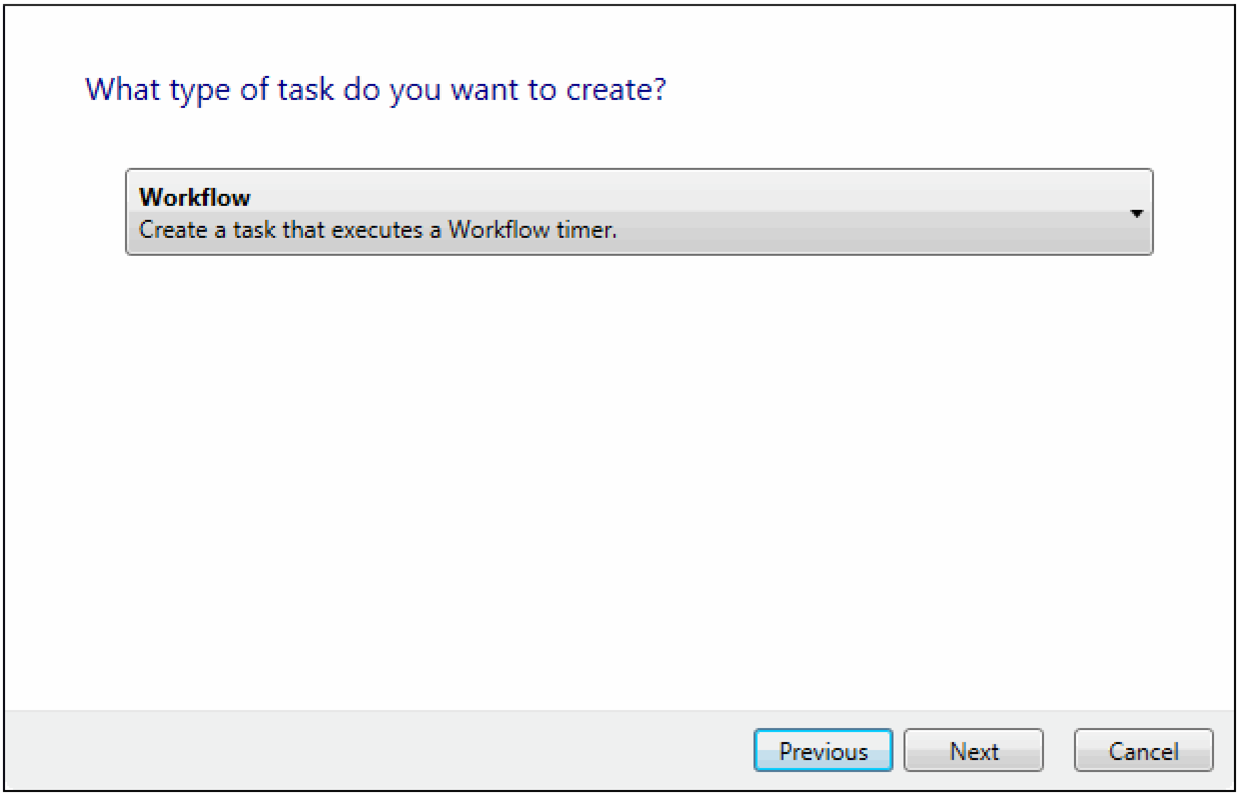
To create a task:

1. In the **Console** tree, select the task scheduler for which you want to add a task.
2. Right-click and select **Create Task**, or select **Create Task** in the **Action** pane.
   The **Task Wizard** is displayed.



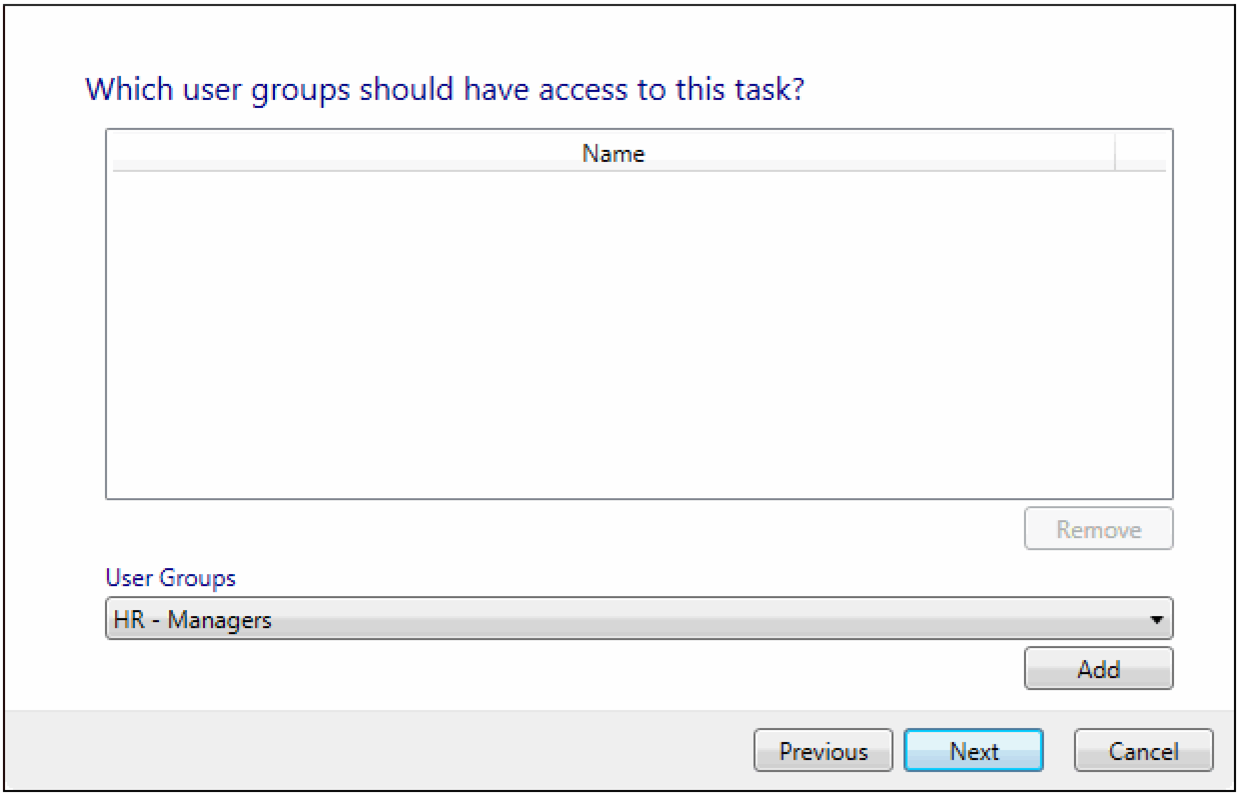

3. Enter a unique name for the task in the **Name** field.
4. Enter a description for the task in the **Description** field.
5. Select a task group from the **Task Group** drop-down list. Existing task groups are available for selection. If **<None>** is selected, the task is added to the **<Unassigned>** task group.

6. Click **Next**. The **Task Type Selection** page is displayed.




7. Select **Email Sending** from the drop-down list.
8. Complete the process in the next section, Configuring Tasks on page 156.

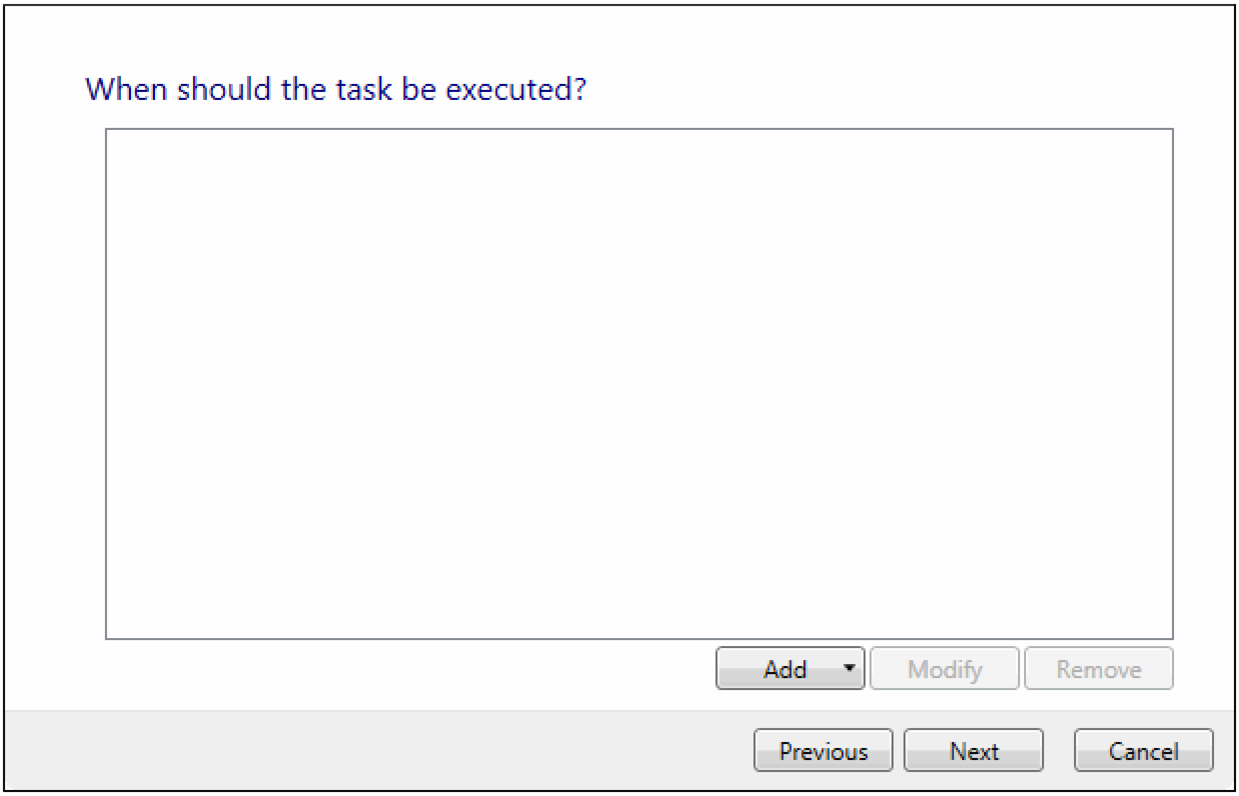
## Configuring Tasks




1. Configure the user groups that will have access to manage this task. Select a user group from the **User Groups** drop-down list, then click **Add**.

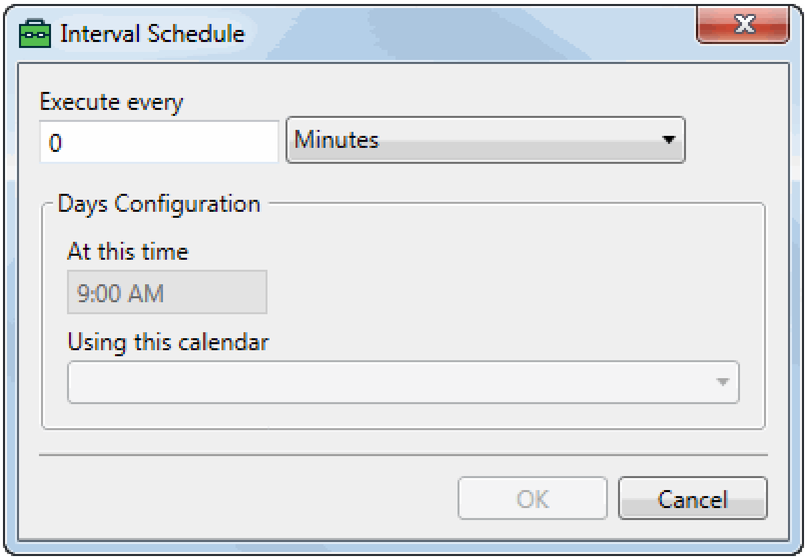
   To remove a group, select it from the list, then click **Remove**.

2. Click **Next**.


When should the task be executed?
Add
Modify
Remove
Previous
Next
Cancel

3. Click the **Add** drop-down list to choose a schedule for the task. Select one of the following options:
   - **Interval** - Executes the task once for every specified interval. For example, the task can be scheduled to execute once every two hours.

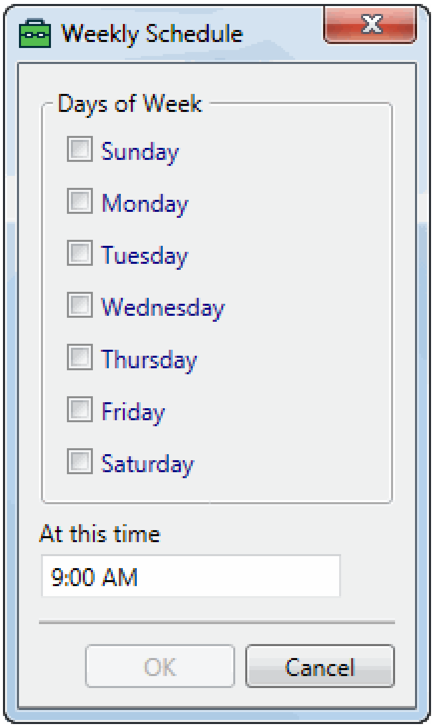
     The **Interval Scheduler** dialog box is displayed:

     Enter a numerical value in the **Execute every** field, then choose a unit of time in the drop-down list. If **Days** or **Business Days** is selected, enter a time in the **At this time** field to determine at what time in the day the task should execute. If **Business Days** is selected, select a calendar in the **Using this calendar** drop-down list to specify the calendar that defines business days. Click **OK**.

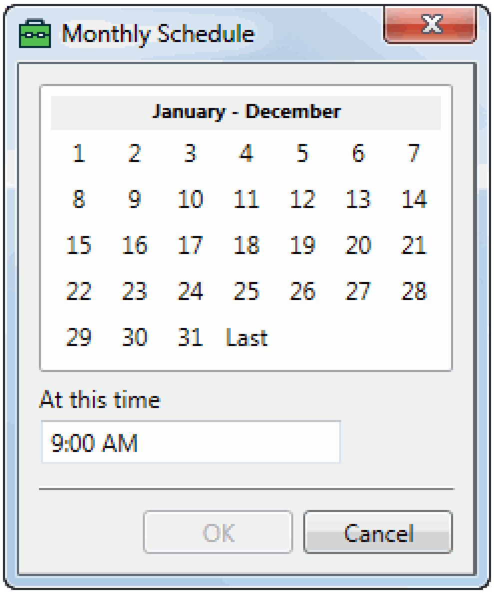
**Note:** If the **Using this calendar** drop-down list is unpopulated, a calendar has not yet been configured. For more information about configuring calendars, see the Org Charts and Calendars section of the **Workflow** module reference guide.

- **Weekly -** Executes the task every week at a specified time. The **Weekly Schedule** dialog box is displayed:



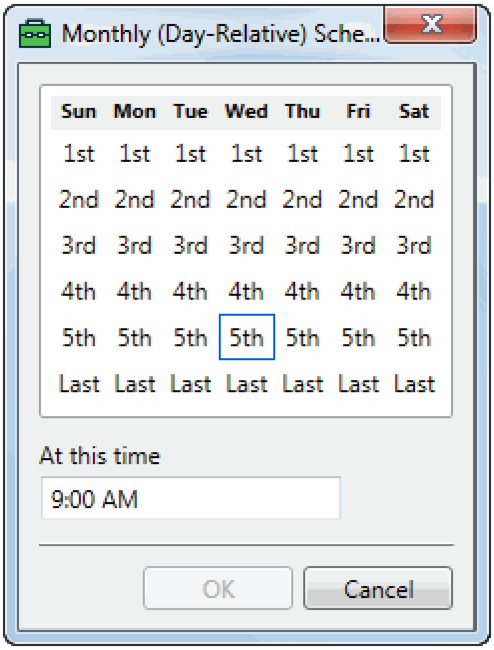

Select the days of the week on which you want this task to execute every week. Enter a time in the **At this time** field to specify the time of day this task should execute, then click **OK**.

- **Monthly** - Executes the task every month at a specified time. The **Monthly Schedule** dialog box is displayed:



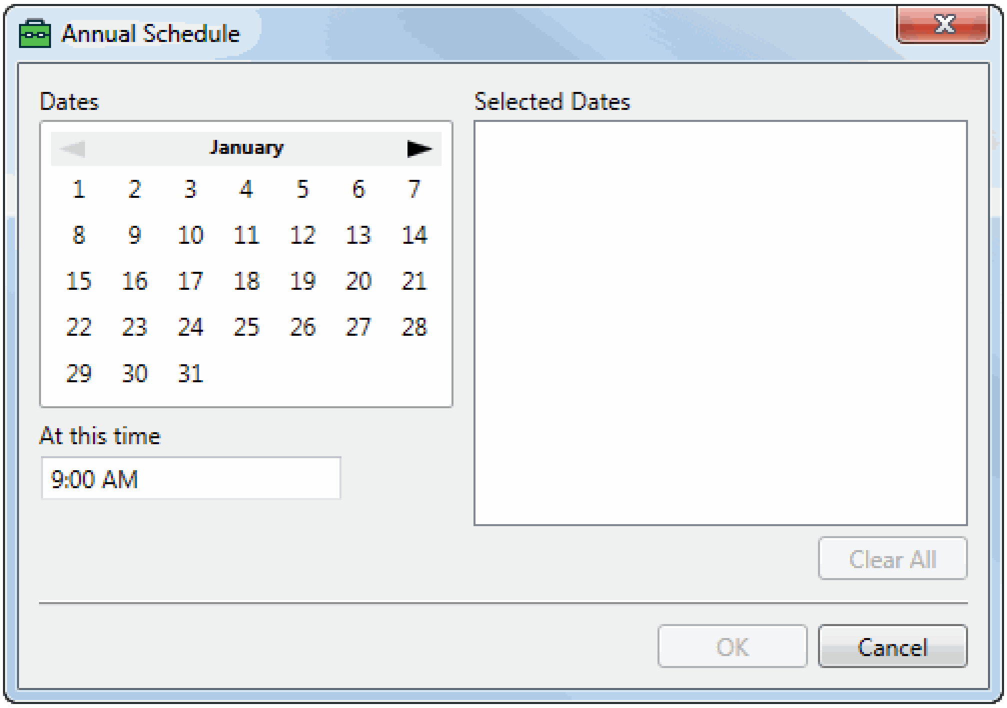

Select the dates on which you want this task to execute every month. Multiple dates can be selected. Select **Last** to schedule the task to execute on the last day of every month. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

- **Monthly (Day-Relative)** - Executes the task every month on either the first, second, third, fourth, or last instance of a specific day of the week. The **Monthly (Day-Relative) Schedule** dialog box is displayed:




Under the preferred day of the week, select whether you want this task to run on the 1st, 2nd, 3rd, 4th, 5th, and/or last instance of that day in the month. More than one selection can be made; for example, you can choose to schedule this task for both the 1st and 3rd Friday of every month). Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

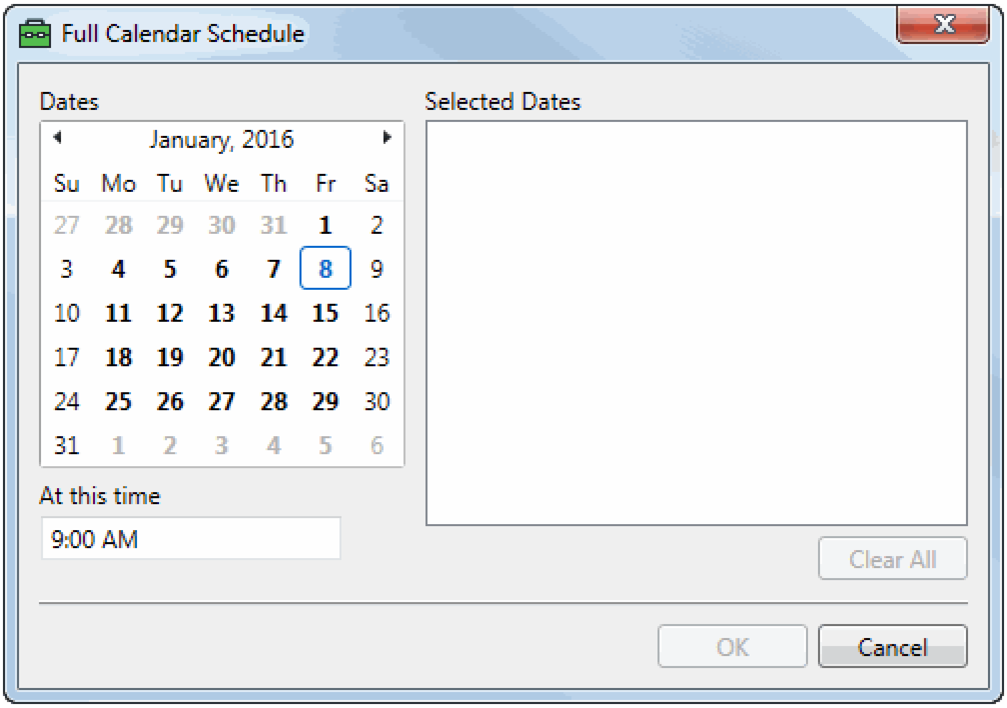
- **Annual -** Executes the task every year on a specified date. The **Annual Schedule** dialog box is displayed:




Select the date on which this task should execute every year. Multiple dates can be selected. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

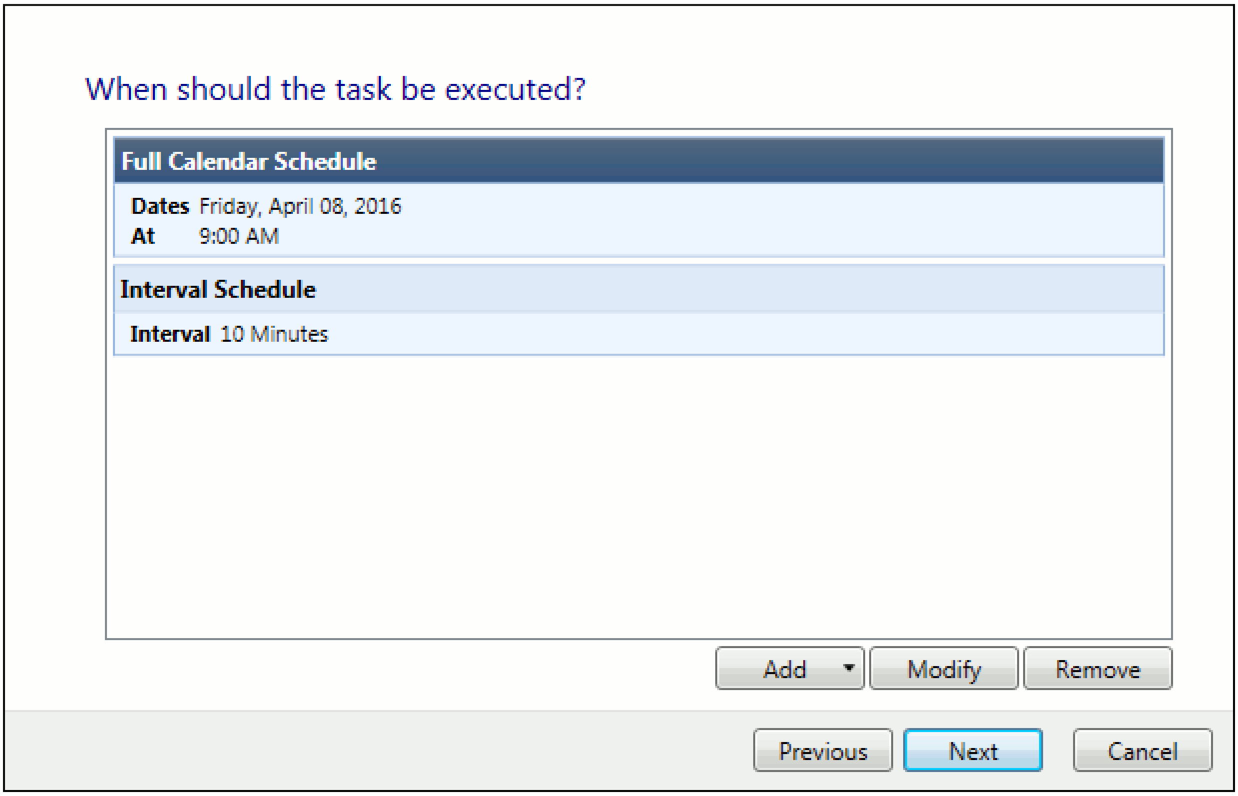
**Note:** The month of February also contains the **Last** option, so that the task can be scheduled to run on the last day of February every year, regardless of whether or not it is a leap year.

- **Full Calendar** - Executes the task on specific dates in a year. The **Full Calendar Schedule** dialog box is displayed:

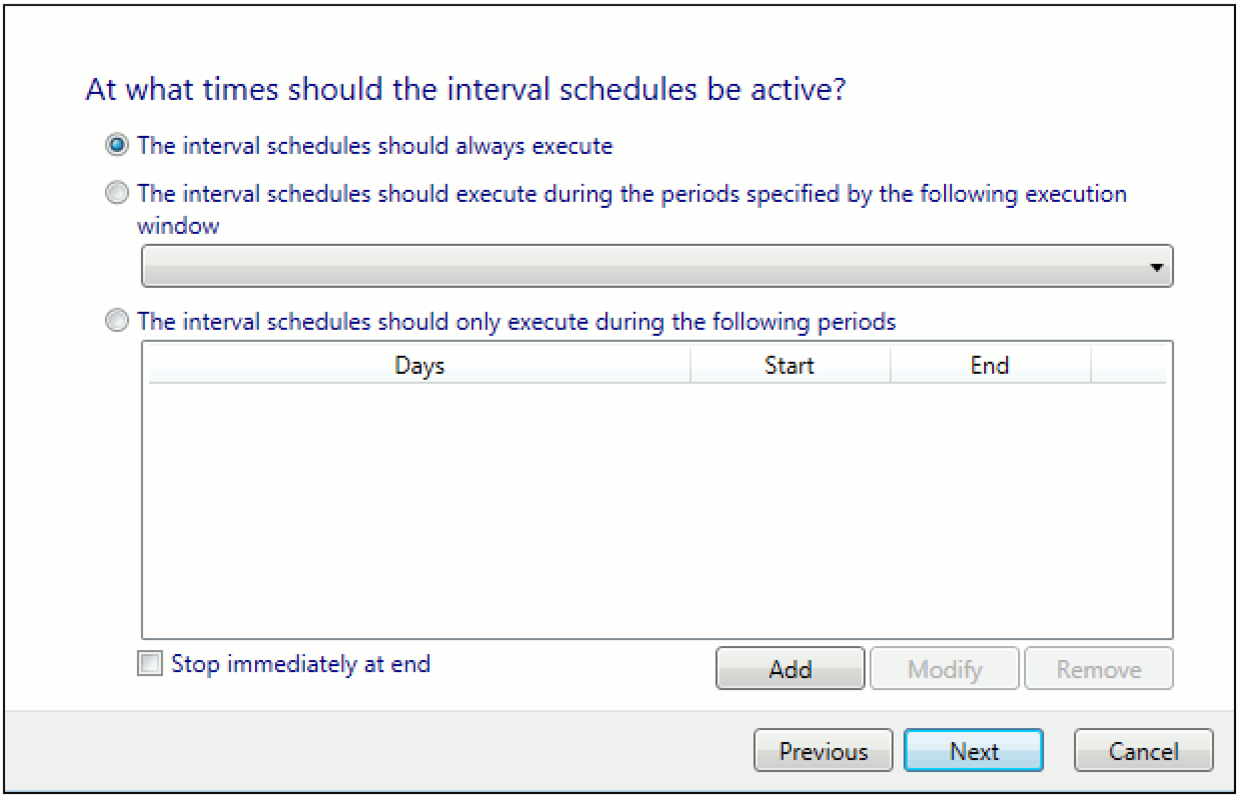



  Select the dates on which the task should execute. To select multiple dates, press and hold **Ctrl** while making your selections. To select multiple consecutive dates, select the first date, press and hold **Shift**, then select the last consecutive date. You can remove all of your selected dates by clicking **Clear All**. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.
- **Existing Schedule** - Choose an existing named schedule that determines when the task should execute.

The configured schedules are added to the list.


When should the task be executed?
Full Calendar Schedule
Dates Friday, April 08, 2016
At 9:00 AM
Interval Schedule
Interval 10 Minutes
Add
Modify
Remove
Previous
Next
Cancel

4. Click **Next**. If you added one or more interval schedules, the following dialog box is displayed.

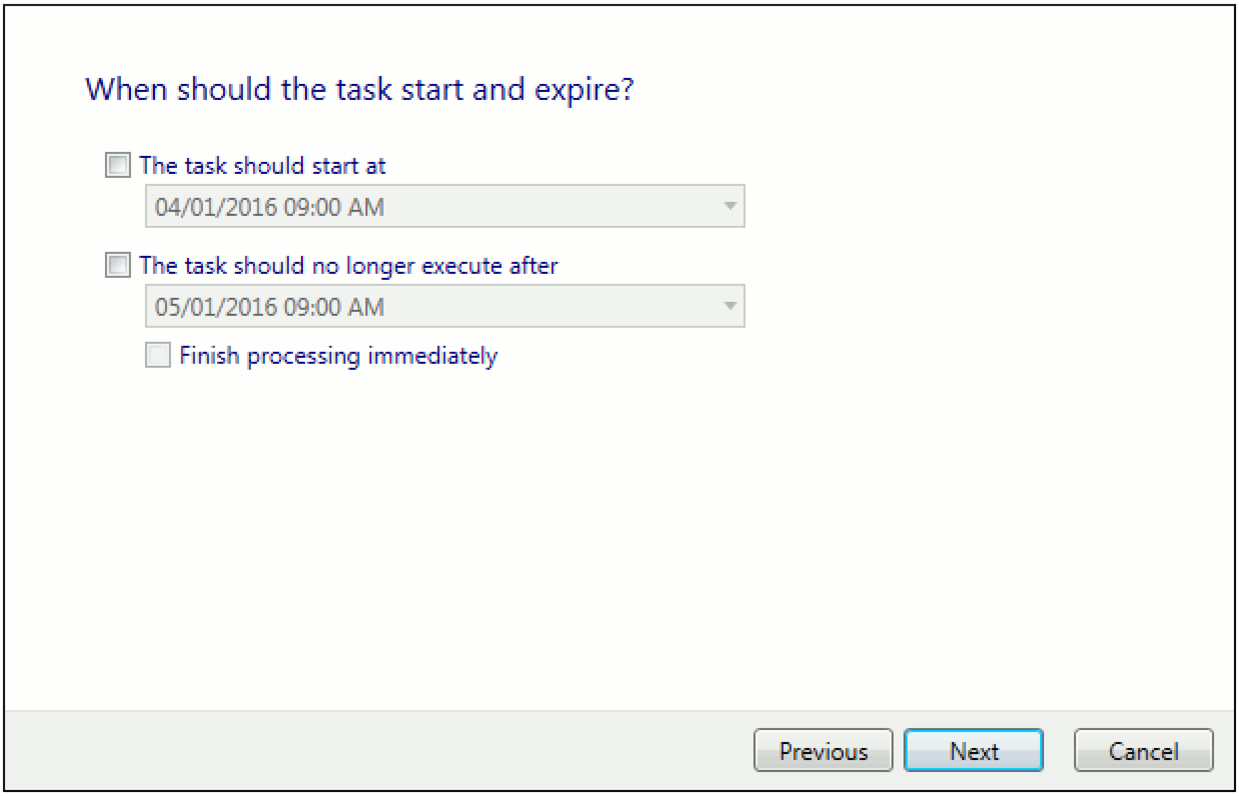


5. Select from the following options to determine when the interval schedules should execute:

| Option | Description |
|---|---|
| **The interval schedules should always execute** | The interval schedules always execute at their configured times.<br>For example, if an interval schedule is configured for 30 minutes, the interval schedule executes every 30 minutes without restriction. |
| **The interval schedules execute during the periods specified by the following execution window** | The interval schedules only execute during the days and times configured within the specified execution window.<br>For example, if an interval schedule is configured for 30 minutes, and the execution window is Saturday, 9 a.m. until 5 p.m., the interval schedule executes at 9 a.m. on Saturday and every 30 minutes until 5 p.m. that Saturday.<br>From the drop-down list, select the appropriate execution window. |
| **The interval schedules should only execute during the following periods** | The interval schedules only execute during the time periods configured within the ad hoc execution window.<br>To create an ad hoc execution window, click the **Add** button. Select the days of the week and the time period the interval schedule should be run. Continue adding time periods as necessary.<br>To abort task execution after the ad hoc execution window reaches the end of a time period, select the **Stop immediately at end** option. This makes it so that at the end of a time period, the schedule finishes processing the current item and stops.<br>**Note:** Unity Script scheduler tasks must be written to specifically support the ability to stop immediately. |

**Note:** Interval schedules are run at the earliest allowed time and then continue running for the configured intervals. For example, if an interval schedule is set for 10 minutes, and it begins on the current day, the next run time for the schedule is the time you finish configuration in the Task Wizard. The schedule then runs every 10 minutes for the duration of the specified time period.

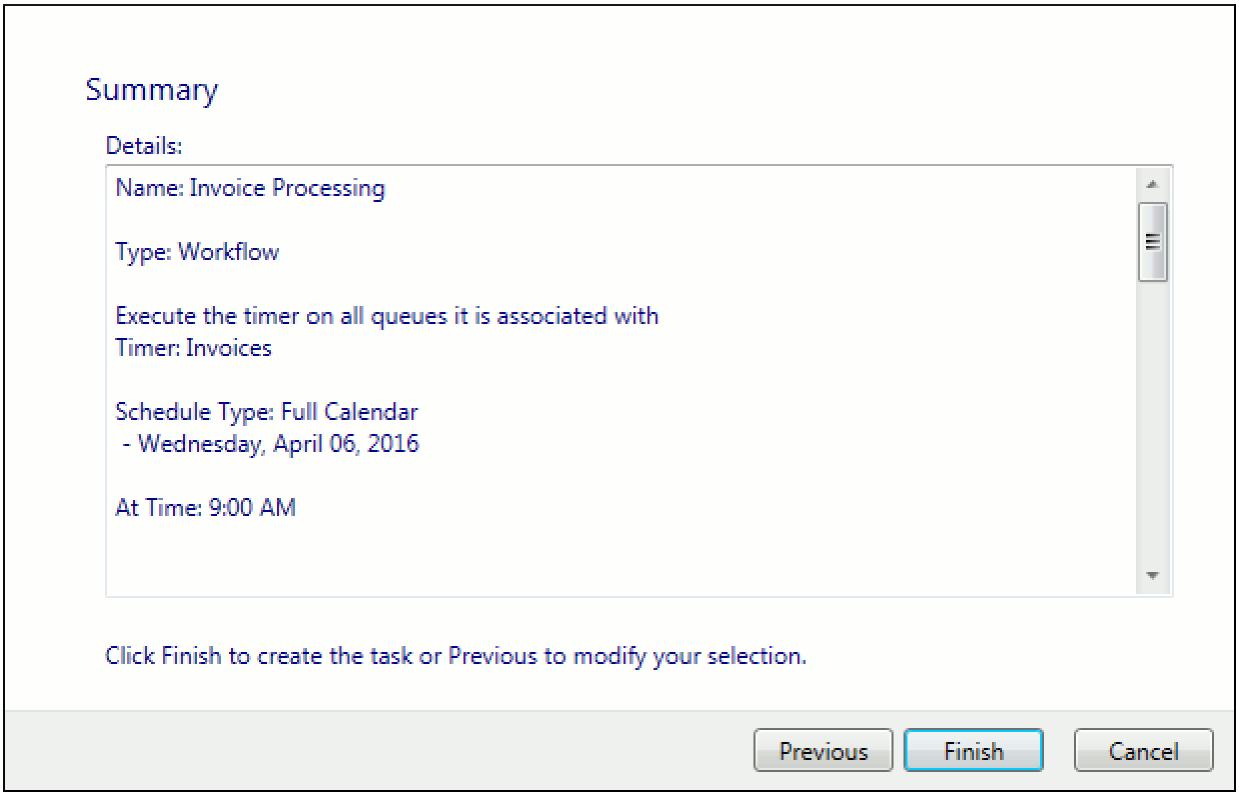
6. Click **Next**.




7. To set a specific start time, expiration time, or both, select from the following options:

| Option | Description |
|---|---|
| **The task should start at** | Select to set a specific start time for the task.<br>Enter or select the appropriate date and time. |
| **The task should no longer execute after** | Select to set a specific end time for the task.<br>Enter or select the appropriate date and time. |
| **Finish processing immediately** | When selected, the task ends at its earliest opportunity after the end time passes.<br>When deselected, the task ends after the end time passes and the entire task is completed.<br>**Note:** This option is only enabled when **The task should no longer execute after** option is selected. |

8. Click **Next**. The summary of your configuration is displayed.




9. Click **Finish** to save the task.

# Enabling the Distribution Service

To use the Distribution Service to send users email notifications or to distribute emails, you must enable it through Global Client Settings. (This step is not necessary if the Distribution Service is used only by WorkView.)

The Distribution Service can be used to send email distributions while using the Document Distribution module and is optional.

The Distribution Service is optional if you want to send notifications for the following modules in the OnBase Client: Document Knowledge Transfer, Workflow, and Physical Records Management. The Distribution Service is required for all other modules that are able to send notifications (such as Document Knowledge Transfer or Workflow in the Web Client).

## Enable Email Automation

To enable email automation using the Distribution Service:

1. From the Configuration module, select **Users | Global Client Settings**.
2. Click the **Email** tab.

3. Select the **Use Email Distribution Service for automated emails** check box or, if you are configuring the Distribution Service for Document Distribution, select the **Use Email Distribution Service for Document Distribution** check box.
4. Click **Save**.

## Send Attachments

The Distribution Service can be configured to send attachments with certain file names.

**Note:** Image documents are sent in their native format if possible. However, if the document uses overlays or the page count is greater than one, it will revert to using the original method for sending attachments.

To configure file names for attachments:

1. From the Configuration module, select **Users | Global Client Settings**.
2. Click the **Email** tab.
3. Select one of the following from the **Auto-Name string for external email attachments** drop-down list:
   - **Random String:** OnBase will generate a random file name for the attachment.
   - **Document Type Autoname String:** OnBase will use the Auto-Name string configured for the Document Type of the document being sent.
   - **Document Type Print Autoname String:** OnBase will use the Print Title string configured for the Document Type of the document being sent. If no Print Title string has been configured for that Document Type, OnBase will use the Document Type and the Document Date.

**Note:** The **Document Type Print Autoname String** feature is not supported in the OnBase Client.

4. Click **Save**.

**Note:** The Distribution Service needs to be restarted after changes are made to the **Auto-Name string for external email attachments** setting.

# Users Configuration Requirements

The following procedure describes the steps necessary to configure the Distribution Service for system notifications. Ensure users who will receive notifications have email accounts configured in their User Settings.

1. From the Configuration module, select **Users | User Names/Passwords**.
2. Select the user name and click **Settings**.
3. In the **Users Email** field, type the user’s email address.
4. Click **Save**.

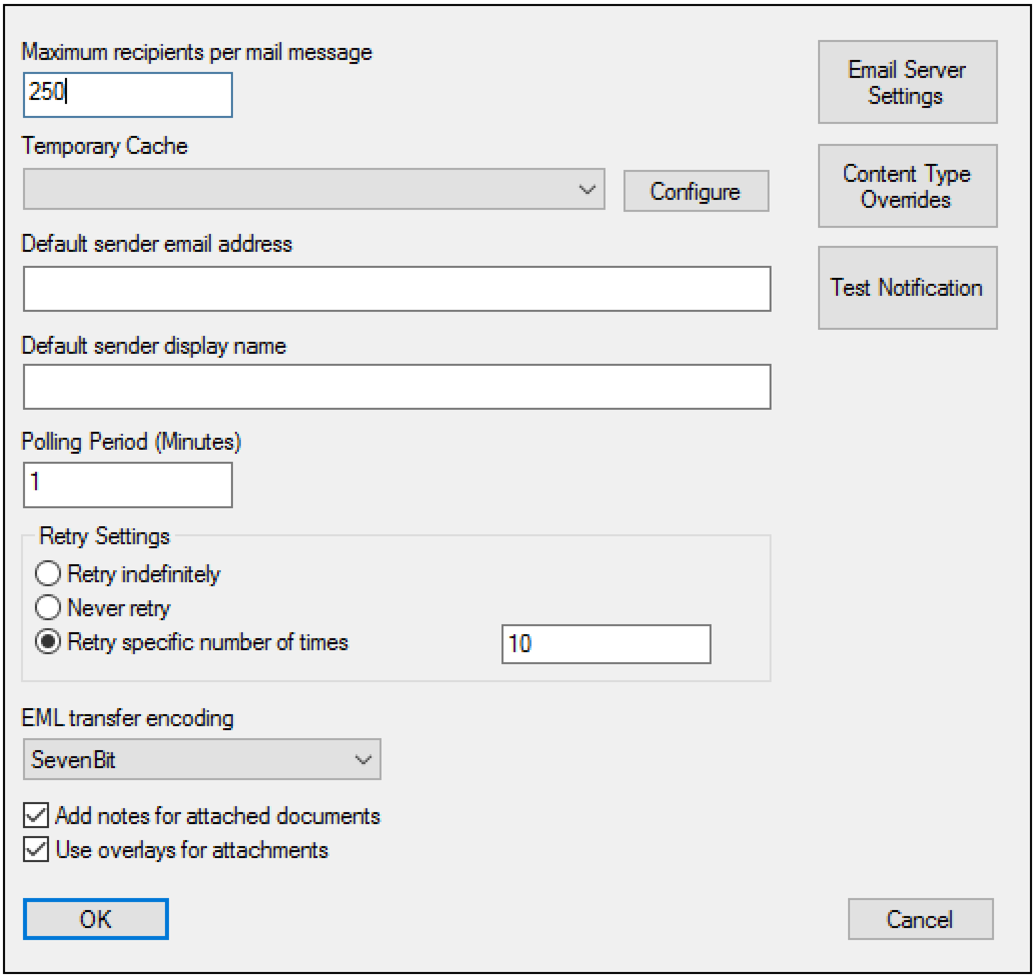
# Configuring Test Mode

In a testing environment, you can configure the Distribution Service to write emails to a file in order to test messages without actually sending them to recipients.

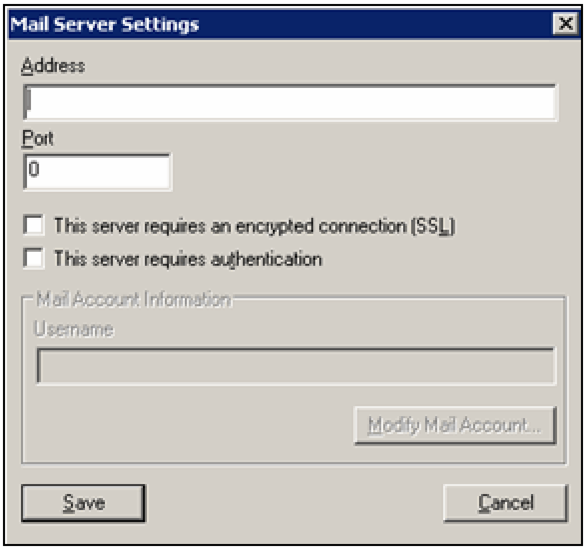
**Caution:** Testing should be performed in a separate testing environment. It is not recommended to use test mode in an environment with live data.

To configure test mode:

1. Open the OnBase Configuration module.
2. From the **Utils** menu, select the **Distribution Service Settings** option. The Distribution Service Settings dialog box is displayed.



3. Click the Email Server Settings button. The Mail Server Settings dialog box is displayed.




4. In the **Address** field, enter an address to a valid UNC path.
5. Click **Save**.

With test mode enabled, messages are saved in EML format to the specified location. These messages can be viewed, verified, and deleted as necessary.

## Adding Support for Multiple Data Sources

If your solution uses multiple data sources, then the Hyland Distribution Service can be configured to access each data source. This provides multiple data sources for redundancy should a data source go down.

To configure the Hyland Distribution Service to access multiple data sources, a corresponding **Email Sending** Unity Scheduler task must be created for each data source. See the **Unity Scheduler** module reference guide for more information.

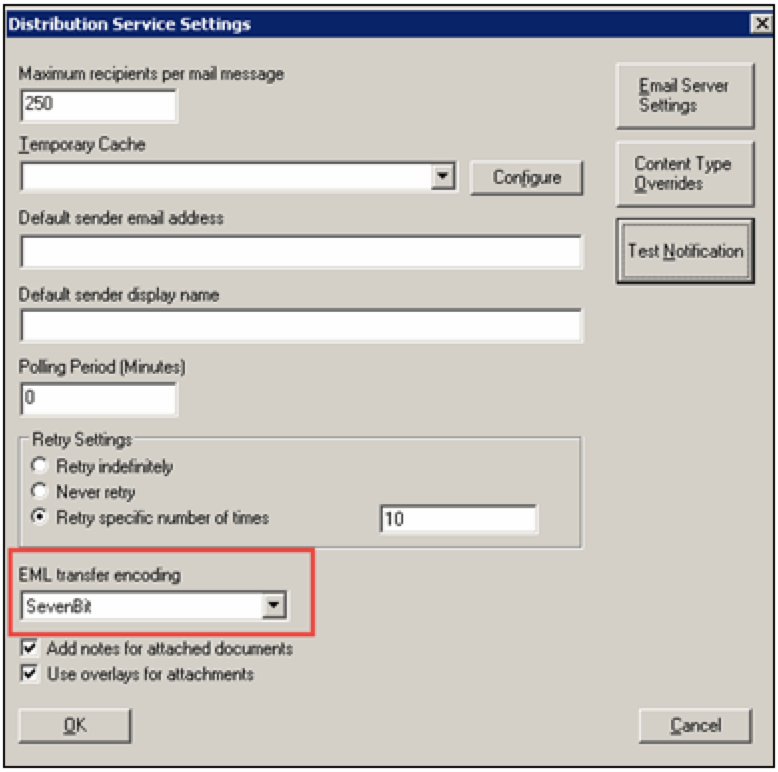
**Note:** To conserve system resources, increasing the polling period is recommended. This can be modified from the Unity Management Console. For more information on task scheduling, see the **Unity Scheduler** module reference guide.

# Configuring EML Transfer Encoding

In some instances, you might want to output email notifications to EML files to be processed by a third-party mail application. When this method for distributing notifications is necessary, complete the following steps:

**Note:** EML files can also be used in testing.

1. Create a directory to store the EML files. This directory should be accessible locally, in a mapped drive or through an UNC path to a shared directory. The path name must be fully qualified. It must start with \\Name, where Name is the name of the machine name, or X:\, where X is any drive letter.
2. From the **Distribution Service Settings** dialog box, select an encoding option from the **EML transfer encoding** drop-down list.




3. Select from either **ServerBit** or **EightBit**.
4. Click **OK** to save the option.

# Configuring the Distribution Service to Save Notifications as E-Mail (EML) Files

In some instances, you might want to output email notifications to EML files to be processed by a third-part mail application. When this method for distributing notifications is necessary, complete the following steps:

1. Create a directory to store the EML files. This directory should be accessible locally, in a mapped drive or through a UNC path to a shared directory. The path name must be fully qualified. It must start with \\[Name], where [Name] is the name of the machine name, or X:\, where X is any drive letter.
2. Modify the address in Configuration | Utils | Distribution Service Settings | Email Server Settings so that the address entry specifies this directory name. One file per notification will be written to the target directory specified.

# Sending Notifications in HTML Format

If you want your notification to be received by the user in HTML format, the notification must be in plain text, and you must add the <HTML> tag to the body of your message.

**Note:** This applies only to plain text notifications. Formatted notifications does not support the use of HTML tags.

# Sending Unity Forms

If you plan to send Unity Forms using the Distribution Service, please see Unity Forms Limitations on page 196.

# Configuring a Temporary File Cache

A temporary file cache is recommended because email notifications and their attachments sent from Document Distribution may include emails and attachments that are not archived in OnBase. The Distribution Service sends these emails from the temporary file cache. Attachments are sent in their configured file format.

Access to the UNC share path of the Temporary File Cache must be provided for the following:

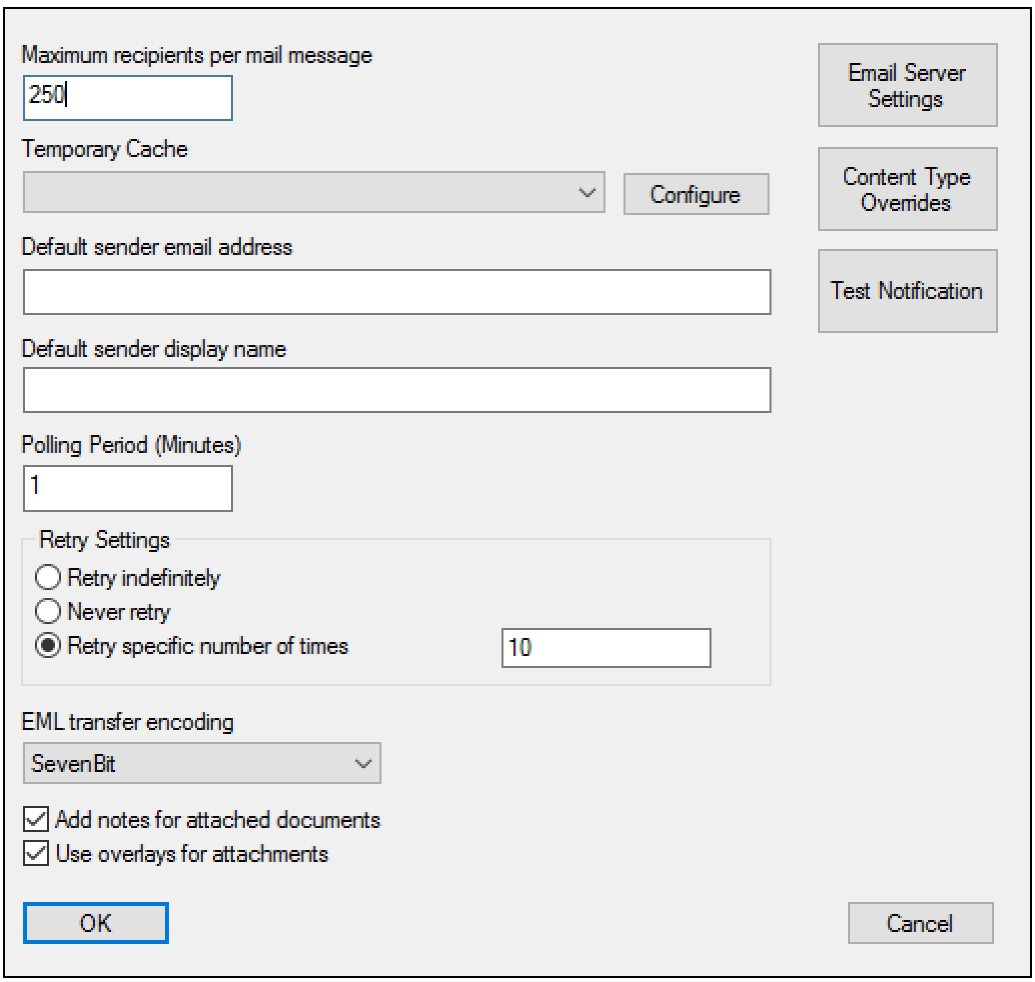
- Within a Core-based Workflow, the Application Pool Identity and Distribution Service account must have access.
- Both the Windows account that is accessing the OnBase Client as well as the Distribution Service account must have access.

A temporary file cache must be configured and associated with the Distribution Service under the following circumstances:

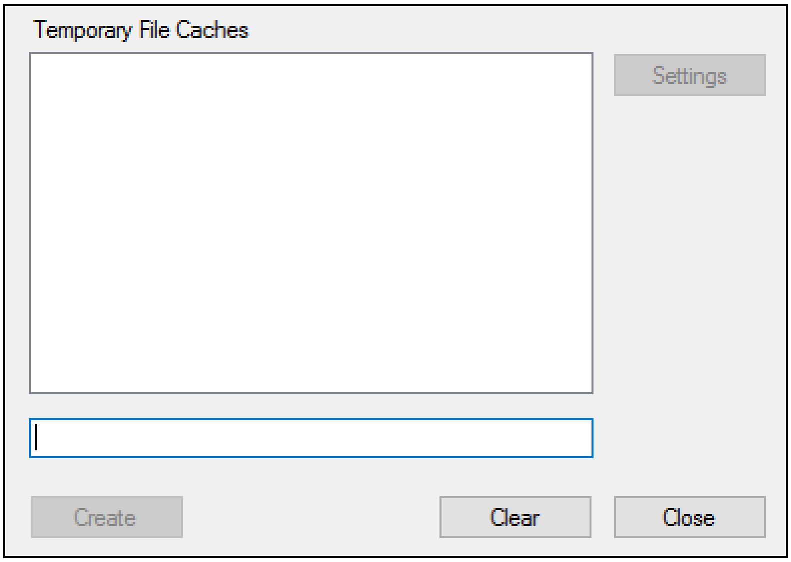
- When the Global Client Setting **Use Email Distribution Service for Document Distribution** is enabled.
- When using formatted or rich text notifications. In order to use formatted notifications, you must have Temporary Cache enabled and set up for the database you are using for testing purposes.
- When sending messages larger than 64000 bytes using WorkView | Case Manager.
- When using HTML WorkView | Case Manager notifications.

To create a temporary file cache:

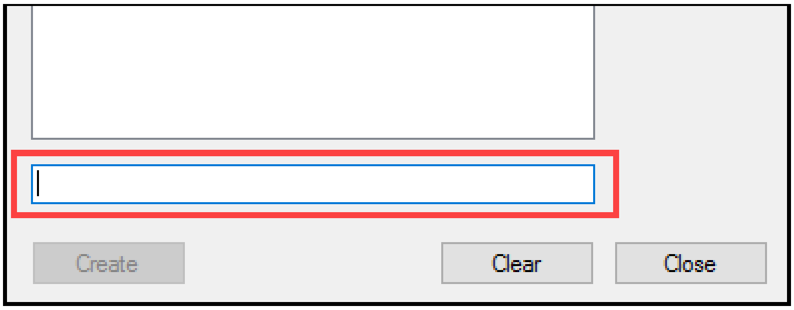
1. In the Configuration module, select **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.



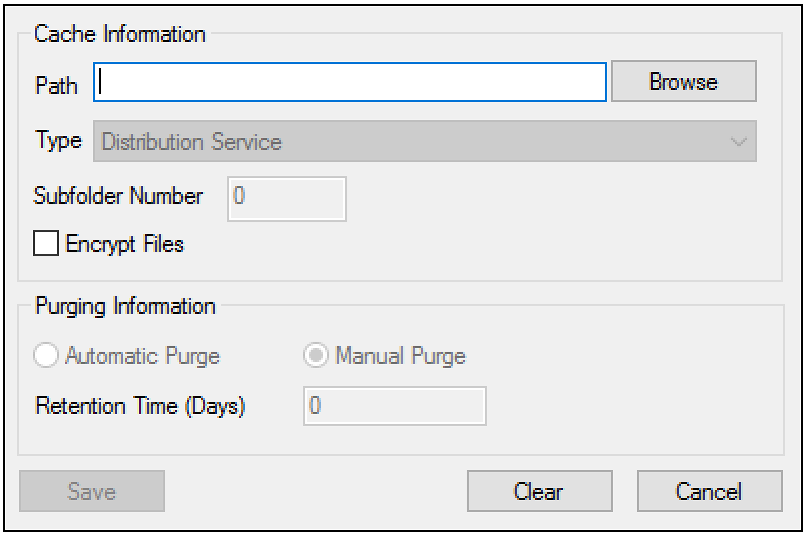
2. Click the **Configure** button next to the **Temporary Cache** drop-down list. The **Temporary Caches: Distribution Service** dialog box is displayed.




3. In the empty field, type the name of the cache you want to create.



4. Click **Create**. The **Cache Configuration** dialog box is displayed.




5. Enter the file path of the temporary file cache in the **Path** field, or click the **Browse** button to navigate to the location.

**Note:** The file you browse to must be a UNC Share, in which the application pool and the account running the Distribution Service have access to this share. The share name must not contain spaces.

The **Type** drop-down list is set to **Distribution Service** by default. This is the service that is automatically used when creating a temporary file cache.

**Note:** If the **Cache Configuration** dialog box is accessed from the **Distribution Service Settings** or **Integrated Office Viewer Settings** dialog box, the **Type** field is set to **Distribution Service** or **Microsoft Office Web Apps**, depending on the point of access, and cannot be changed. These temporary caches, created from the **Configure** button in the **Distribution Service Settings** dialog box or the **Integrated Office Viewer Settings** dialog box, are automatically associated with the desired functionality upon completion of configuration.

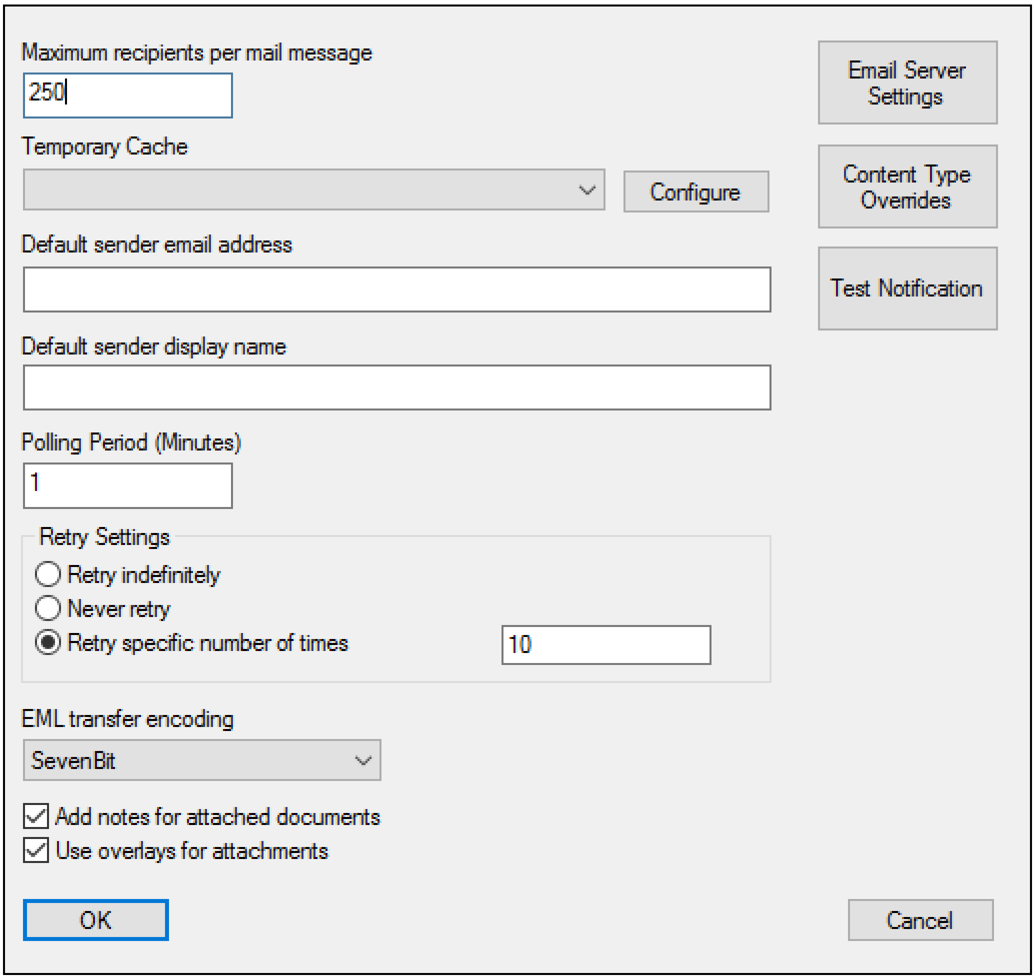
6. Select **Encrypt Files** to encrypt the temporary files. Encrypting the data prevents people from opening the files, which keeps the information more secure.
7. Click **Save**.

**Note:** Once a temporary file cache is configured, it must be associated with the Distribution Service. See Configuring Retry Settings on page 177 for more information.

# Configuring Retry Settings

The Distribution Service can be configured to attempt to send notifications again upon a failure. To configure these settings:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:

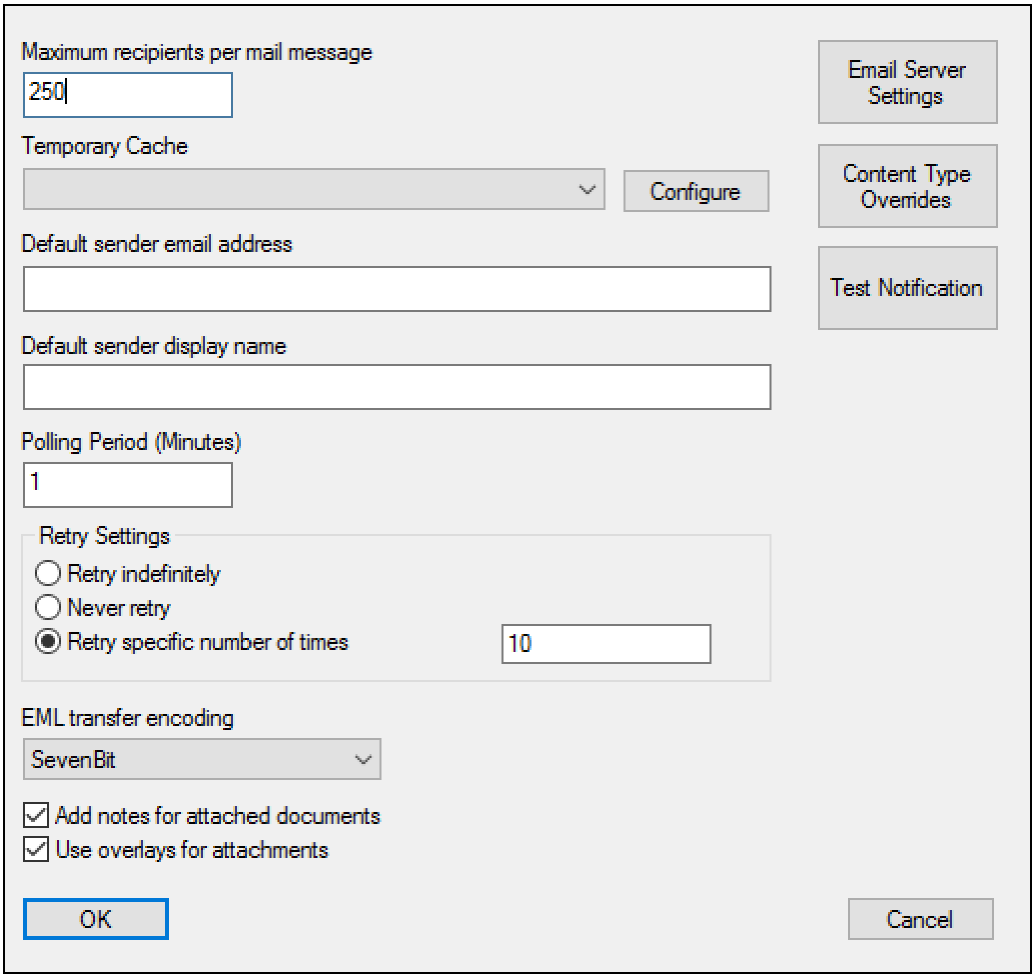



2. In the **Retry Settings** section, select one of the following options:
   - **Retry indefinitely -** The Distribution Service continuously tries to send a notification if a failure occurs.
   - **Never retry** - The Distribution Service does not attempt to send the notification if a failure occurs.
   - **Retry specific number of times** - The Distribution Service tries to send the notification until the specified number of attempts is reached. In the field provided, enter the number of attempts that you want the Distribution Service to make.
3. Click **Save**.

# Configuring Maximum Recipients

A maximum number of recipients per each generated notification email message can be configured. This ensures that in the case of a long list of recipients, recipients are broken up and multiple emails are generated in order to prevent timeout errors. To configure a maximum number of recipients per email:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:




2. In the **Maximum recipients per mail message** field, enter the maximum number of recipients that a message should have. If the recipient list is longer than the value of this setting, emails are sent in multiple batches.

**Note:** If you do not want a maximum number of recipients per mail message, set the **Maximum recipients per mail message** value to **0**. This does not set a maximum number of recipients. A single message is generated for all recipients.

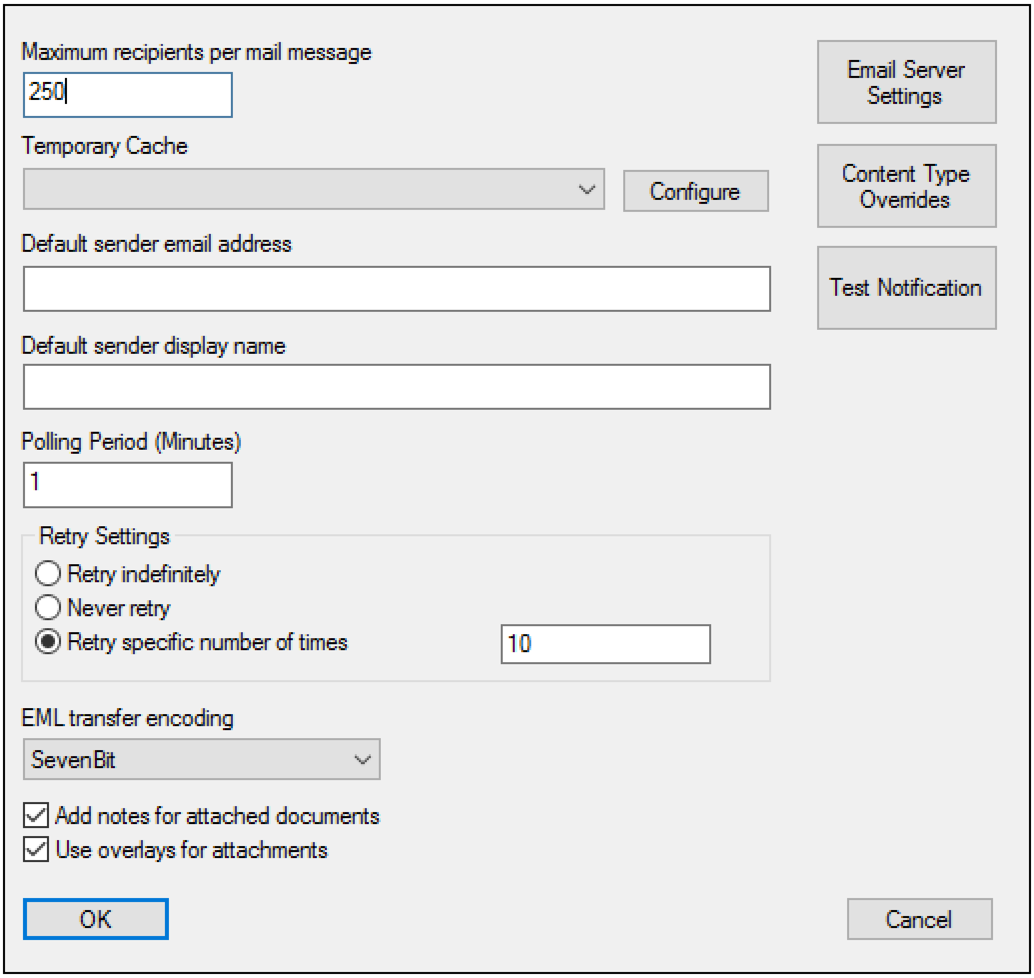
# Configuring Default Sender Options

You can establish a default sender for any emails that are distributed using the distribution service. This can be used if you want to send emails using a generic account. For example, if you want to send general information to a group of people, you may want to set up an Information email account.

**Note:** The sender that displays is either the authenticated user or the sender of the request. If those are not available, then the default sender value is used.

To configure a default sender:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.




2. In the **Default sender email address** field, type the email address belonging to the sender you want listed as the default. For example, the sender email could be info@email.com.

3. In the **Default sender display name** field, type the name for the default sender. If this is to be a general information account, you may want to type Information as the default sender.
4. Click **OK**.

## Displaying the User Who Triggered the Notification as the Sender

The Default Sender email address is configured in the OnBase Configuration module, using the Distribution Service Settings dialog box. See Configuring Default Sender Options on page 179 for more information.

The following progression is taken if authentication is not used:

- Initially, the sender who generated the notification will be used.
- If that value is null, then the Distribution Service's default sender address value will be used.
- If that value is null, then the user who generated the notification will be used as the sender.

**Note:** When displaying the user who triggered the notification as the sender, leave the **Default Sender** field empty.

Users who trigger notifications must have valid email addresses configured in OnBase. Otherwise, the notifications are not sent, and the message **Server Error: 501 5.5.4 Invalid Address** is displayed in the **Errors** tab of the Diagnostics Console.

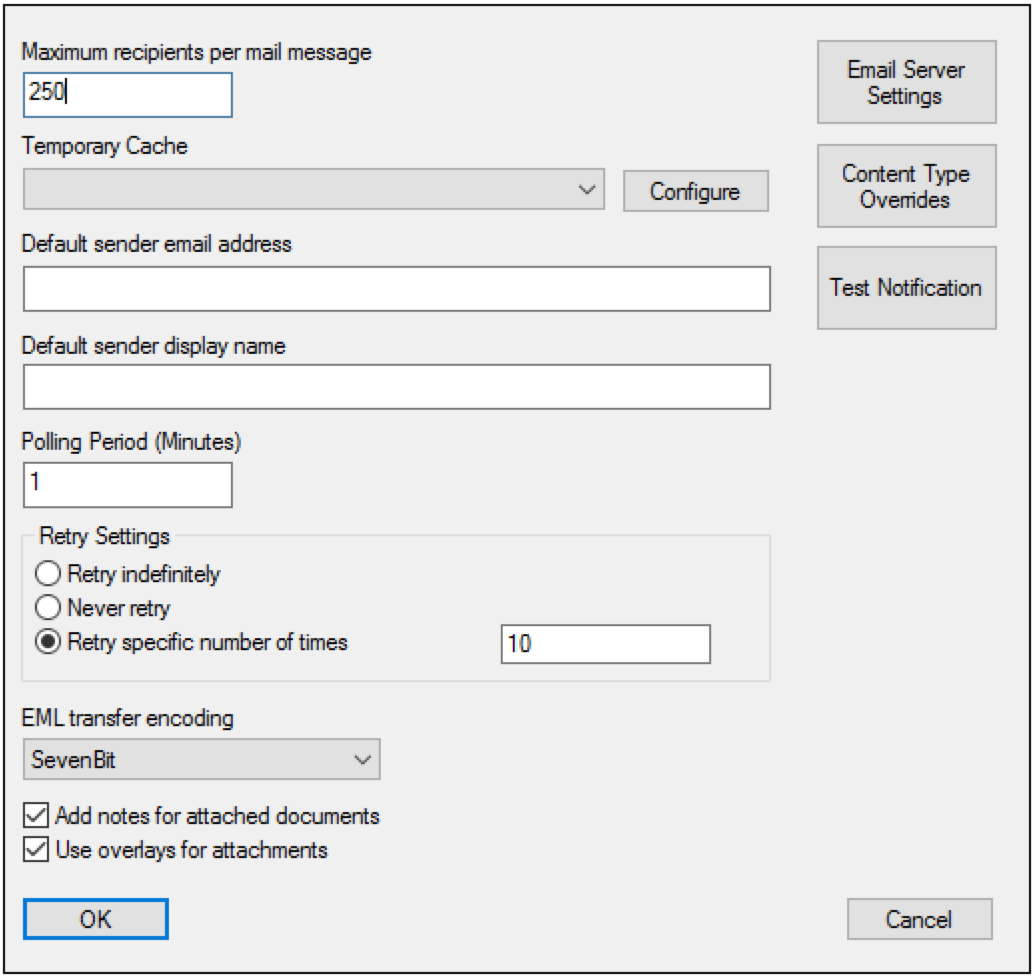
The **Default Sender** setting can be overridden by modules like Workflow and WorkView, which allow you to configure the sender address for notifications.

## Configuring Attachment Options

If a document that has been attached to an email contains notes or overlays, you can configure the document to not include notes and overlays when the document is sent as an attachment.

To configure document options:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.




2. De-select the **Add notes for attached documents** check box to remove the notes from attached documents.
3. De-select the **Use overlays for attachments** check box to remove overlays from attached documents.
4. Click **OK**.

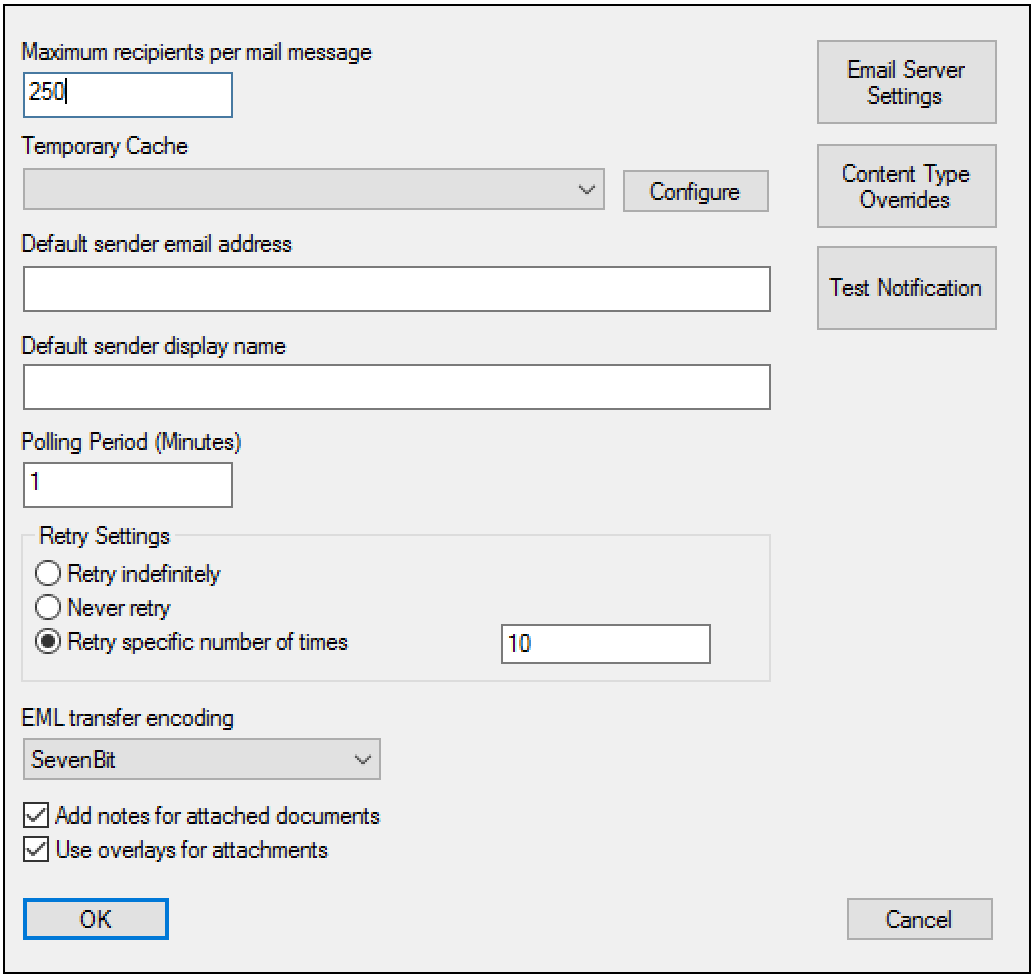
# Configuring Email Server Settings

The Email Server Settings option provides the ability to configure the mail server to send emails. From this dialog box, you can specify an address for the server, the port number and other settings that are specific to the server. You can also require that emails are routed with an SSL encrypted connection.

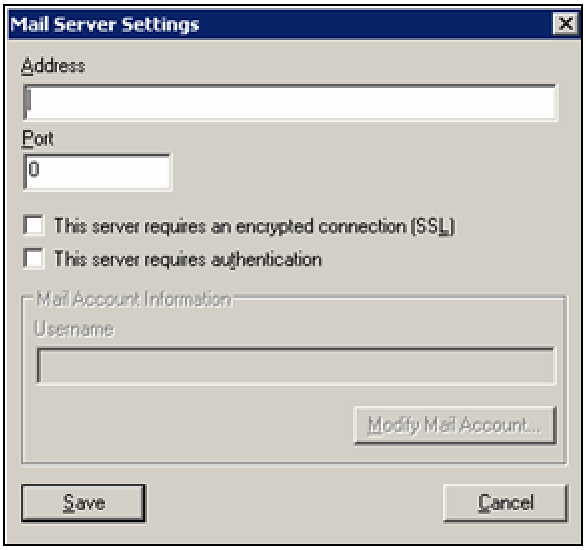
**Note:** The SmtpClient class for routing emails using SSL encryption only supports the SMTP Service Extension for secure SMTP over Transport Layer Security as defined in RFC 3207, which is published by the Internet Engineering Task Force (IETF). In this mode, the SMTP session begins on an unencrypted channel, then a STARTTLS command is issued by the client to the server to switch to secure communication using SSL.

To configure email server settings:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.

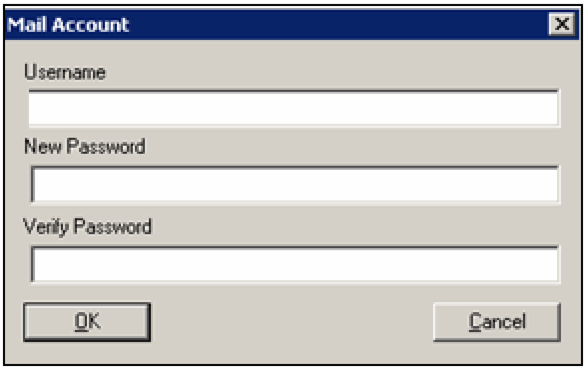


2. Click **Email Server Settings**. The **Mail Server Settings** dialog box is displayed.




3. In the **Address** field, type the address for the mail server.
4. In the **Port** field, type the port number that is used for the mail server.
5. Select the **This server requires an encrypted connection (SSL)** check box to require that the server has an encrypted SSL connection.

6. Select the **This server requires authentication** to validate that a mail account has been configured for the mail server. When this option is selected, the **Modify Mail Account** button is enabled. Select this button to display the Mail Account dialog box.




Enter a valid username and password in the **Username** and **New Password** fields. Re-enter the password in the **Verify Password** field, and then click **OK**.

**Note:** The user name must be formated as the following: email@domain.com.

When authentication is enabled, note the following:

- When replying to an email, the authenticated email (your email) is displayed in the From field.
- If the Default Sender field is populated, and authentication is enabled, the Reply to field is automatically populated with the request's sender when replying to emails.

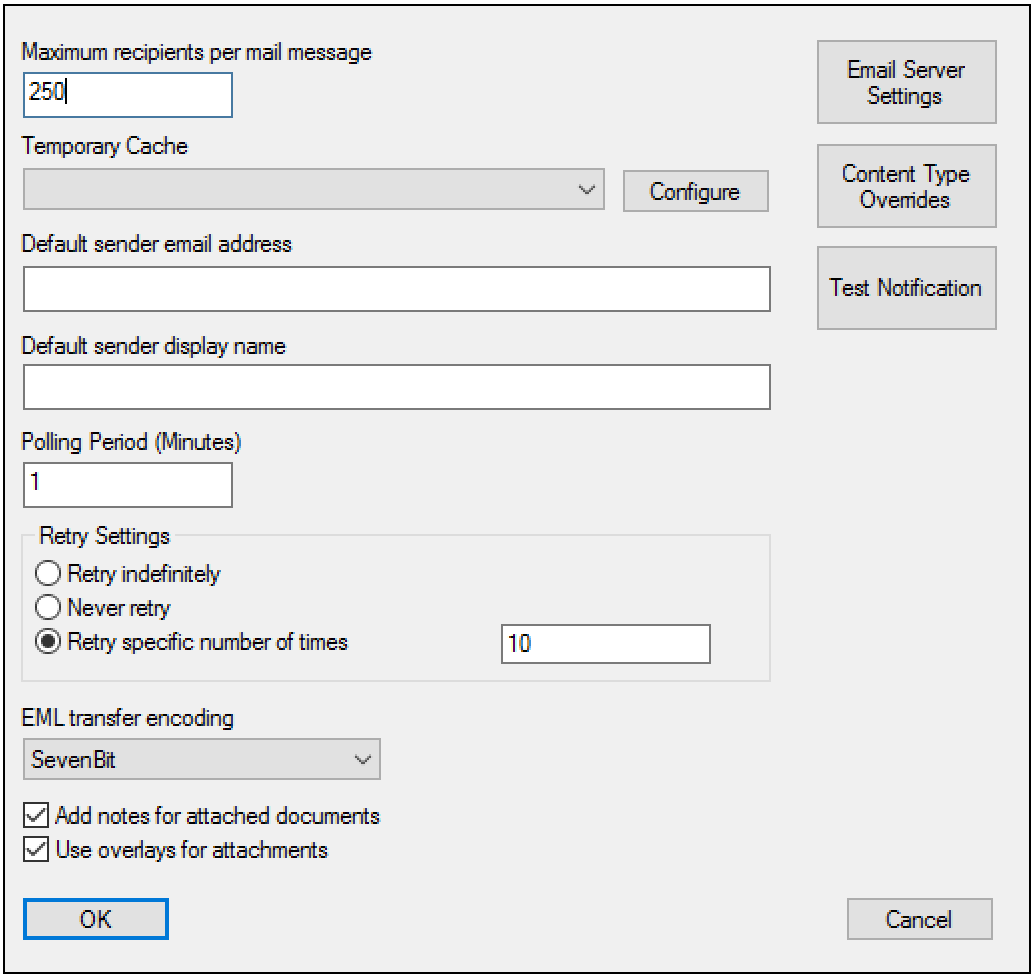
7. Click **Save** to save the mail server settings.

## Generating and Sending Test Notifications

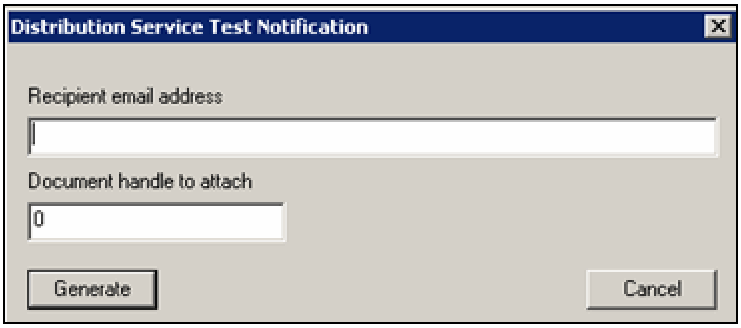
To ensure that the Distribution Service is configured properly, test notifications can be generated from the Distribution Service Settings dialog box.

To generate test notifications:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:




2. Click **Test Notification**. The **Distribution Service Test Notification** dialog box is displayed.




3. Enter a valid SMTP email address in the **Recipient email address** field.

4. If you want to attach a document, enter a document handle in the **Document handle to attach** field. The specified document will be sent as an attachment in the email.
5. Click **Generate**. The notification is sent when the Distribution Service is started. Check the recipient email mailbox to ensure the notification was sent.

# Viewing Reports in the Unity Management Console

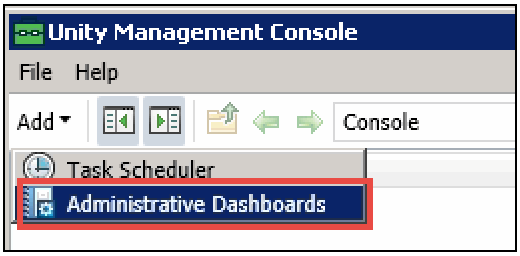
The Distribution Service Administrative Dashboard is available in the Unity Management Console. This dashboard allows you to view the status of emails that have been sent through the Distribution Service. Using the dashboard, you can view reports for the following:

- All Emails
- Successful Emails
- Failed Emails
- Pending Emails

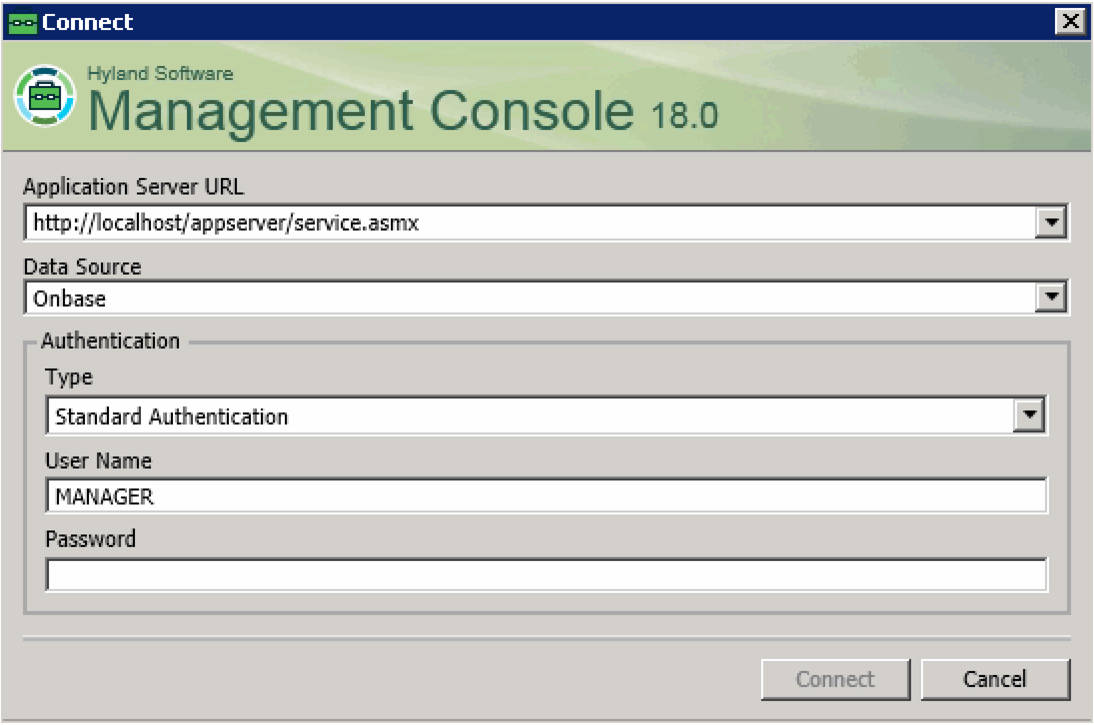
Before you can use the new dashboard, you must install the Unity Management Console. See the **Unity Scheduler** module reference guide for more information.

To add the Distribution Service Administrative Dashboard:

1. Open the Unity Management Console.
2. Click **Add | Administrative Dashboards**.

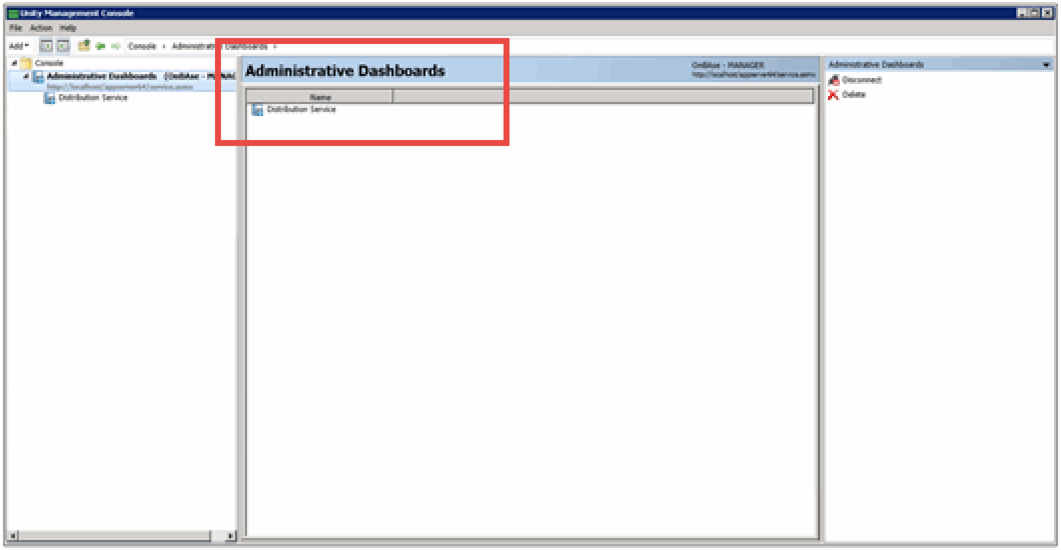



The **Connect** dialog box is displayed.



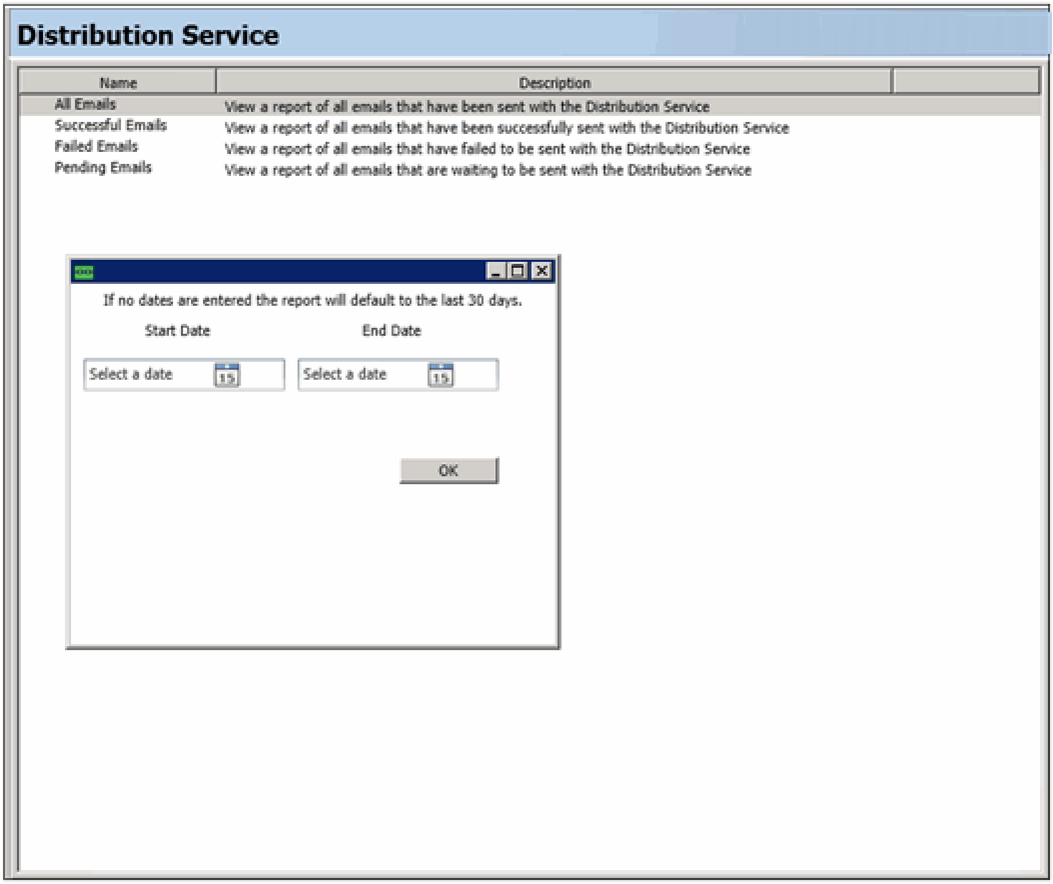

3. Ensure that the information provided in the fields is correct.
4. Enter your password in the **Password** field to authenticate the connection.

5. Click **Connect**. The **Distribution Service** dashboard is displayed in the **Administrative Dashboards** pane.



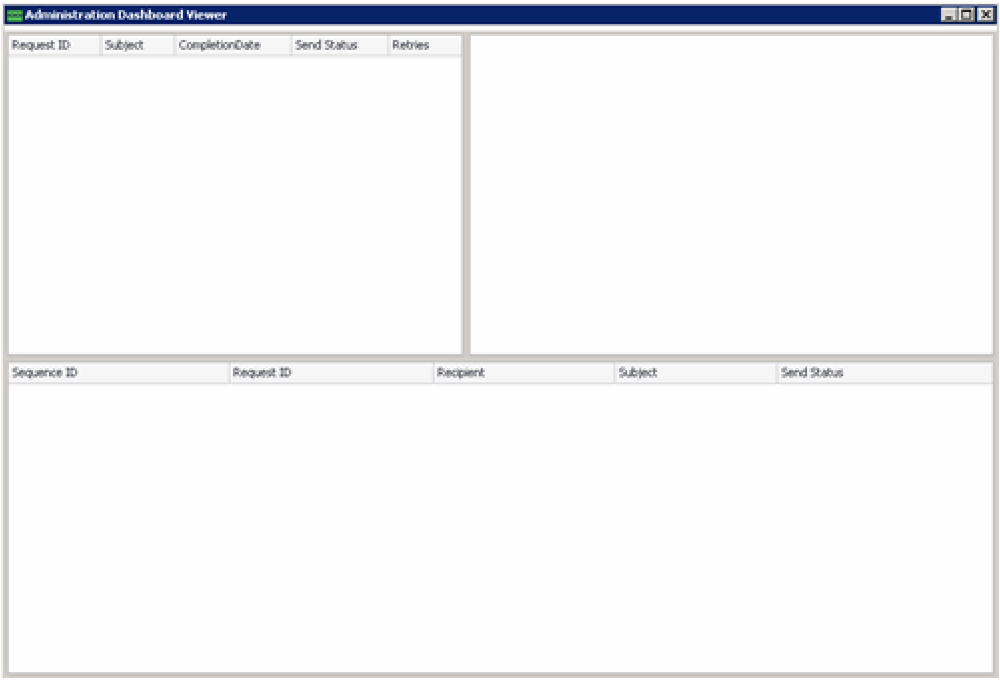

6. Double-click the **Distribution Service** dashboard.

7. Double-click a report to view one of the email report options. A date range dialog box is displayed.




8. Choose a date range from the **Start Date** and **End Date** pickers.

9. Click **OK**. The **Administration Dashboard Viewer** is displayed, listing information for any emails that fall into the category of the report you selected.




10. Click the **X** to close the **Administration Dashboard Viewer** window.

# Troubleshooting

The following troubleshooting information may help you diagnose and resolve issues with the Hyland Distribution Service.

## Logging Information to the Diagnostics Console

You can use the Diagnostics Console to troubleshoot Distribution Service issues. Diagnostics information is logged under the **Timer / Distribution Service** tab in the Diagnostic Console.

**Note:** For general information on diagnostics, see the Diagnostics Service reference guide or the Diagnostics Console help files.

When an **Email Sending** task is manually initiated from the Unity Management Console, the logging levels set in the Application Server's web.config file are respected. When an **Email Sending** task is automatically triggered by the Unity Scheduler, the logging levels set in the Unity Scheduler's app.config file are respected.

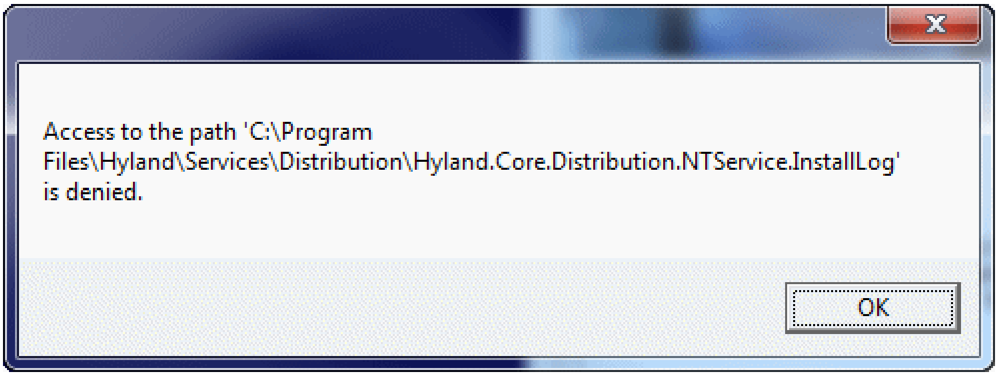
In either the Application Server's web.config file or the Unity Scheduler's app.config file, modify the logging level to activate logging. If logging is activated, it always occurs at the **Verbose** level. Setting the **minimum-level** key to different values will yield the results described below:

- If the line specifying the **minimum-level** is commented out, information about the Distribution Service is logged at the **Verbose** level.
- **Trace** - Information about the Distribution Service is logged at the **Verbose** level.
- **Verbose** - Logs important information and events regarding the Distribution Service.
- **Warning** - No Distribution Service information is logged.
- **Error** - No Distribution Service information is logged.
- **None** - No Distribution Service information is logged.

**Note:** If the Distribution Service sends an email without a specified **To** address, an SMTP server error displays on the **Errors** tab. The SMTP server sends Undeliverable Message notifications to the **From** address specified in the message template.

## Access to the path...is denied

If you try to manually install or uninstall the Hyland Distribution Service on a server with Windows User Account Control (UAC) enabled, an "Access denied" message may be displayed.




To address this issue, run the Command Prompt as an administrator. Under **Start | Accessories**, right-click on **Command Prompt** and select **Run as administrator**.

For more information about how the User Account Control can affect OnBase deployments, see Windows User Account Control Statement on page 196.

## Error Loading Document: Attachments Are Not Sent

When the Hyland Distribution Service sends emails with attachments, the body of the emails may say the following:

- ERROR LOADING DOCUMENT: Document Number: [#]

This error may occur because the account running the Hyland Distribution Service lacks privileges to the document on the OnBase disk group.

To resolve this issue, perform the following steps on the server where the Hyland Distribution Service is installed.

1. Using a **Run** dialog box, run **services.msc**.

   To do this, select **Start | Run**, type **services.msc** and click **OK**. The **Services** console is displayed.
2. Double-click **Hyland Distribution Service** from the list of services.
3. Click the **Log On** tab.
4. Under **Log on as**, select **This account**.
5. Type a valid domain user name and password that has access to the OnBase disk groups. This user account will be used to run the service.
6. Click **OK** to save your changes and close the properties dialog box.
7. Restart the Hyland Distribution Service.

# Messages Are Not Sent

Messages may not be sent for multiple reasons. The following are general steps to troubleshoot the issue. Steps to address specific issues are provided in the following topics.

1. Ensure the Distribution Service Settings are configured correctly.
2. If there are any firewalls between the servers running the Unity Scheduler and the SMTP server, open the SMTP port to allow the traffic to pass through.
3. Verify proper credentials are used if using authentication.
4. Verify that your antivirus software is not configured to block the SMTP port.

## Workstation Registration Not Found

When you run the Distribution Service, messages are not sent, and the following error is logged to the Diagnostics Console: **Workstation Registration not found for distribution server machine**.

This error is displayed because required OnBase components such as registry keys and the onbase32.ini file have not been created on the server running the Distribution Service.

To resolve this issue, log in to either the OnBase Client or the OnBase Configuration module from the server that is running the Distribution.

## Cannot Create a Session Pool

If the Distribution Service is running but fails to send messages, the following error may be logged to the Diagnostics Console:

- Cannot create a session pool without a data source, user name, and password.

When this error occurs, do the following:

- Check the **Hyland.Core.Distribution.NTService.exe.config** file and ensure the **datasource**, **username**, and **password** parameters are specified correctly.
- Ensure the names of the parameters in the configuration file are spelled correctly, including case. Parameter names are case sensitive. For example, if **username** is spelled as **UserName**, the parameter is not loaded.

## "No Count" Is On

If the Diagnostics Console reveals that notifications are being processed but are not being sent, you may need to turn off the No Count variable on your SQL Server. Please contact your solution provider for assistance.

## Version Mismatch

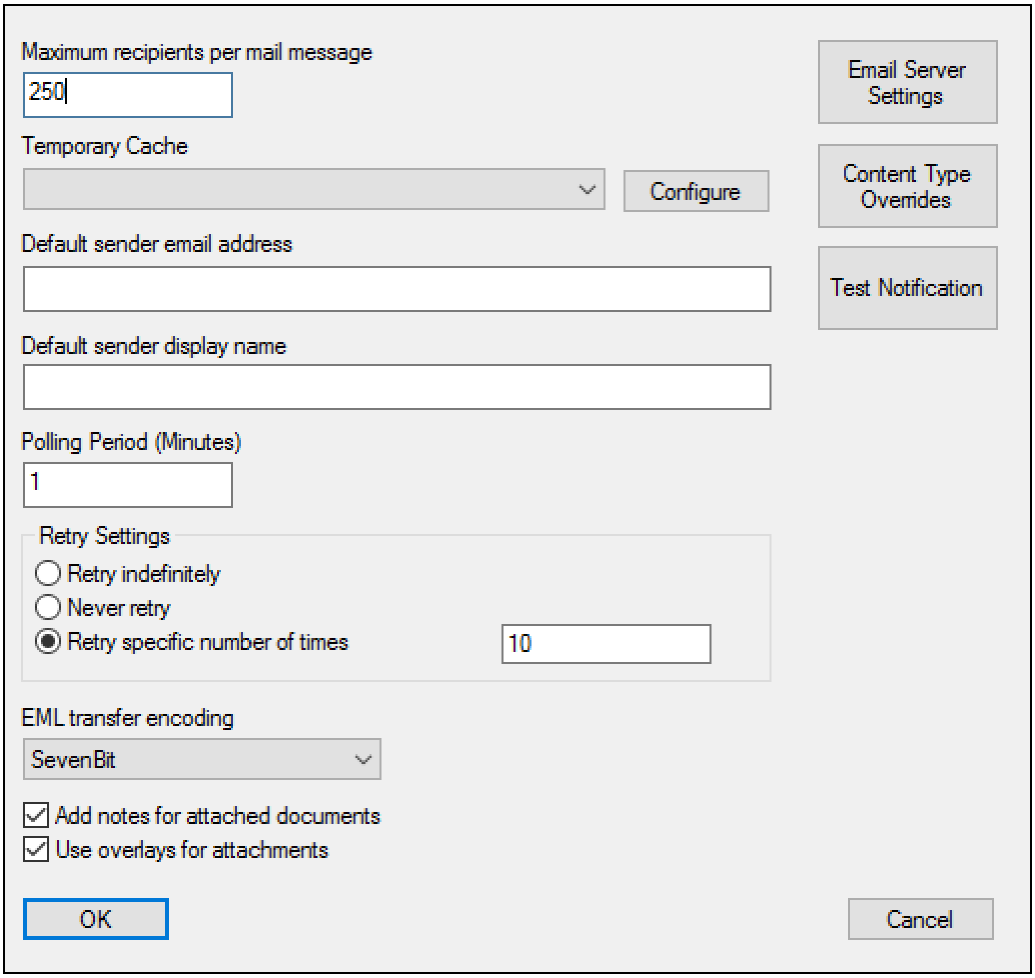
If you find that messages are not being sent, you may be using a version of the Distribution Service that is incompatible with your current version of OnBase. If this is the case, an error is logged to the Diagnostics Console indicating that there is a database version mismatch. Ensure the Distribution Service is upgraded to the same version as the rest of your OnBase solution.

# Message Content and Attachments Are Reversed

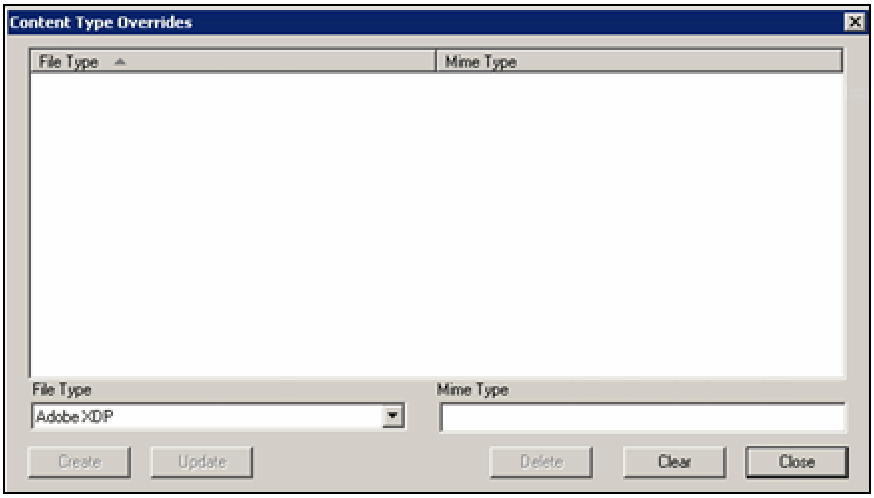
Some email clients do not properly handle content types for attachments with certain file formats. As a result, documents with these file formats are sent as the message text instead of as attachments, and the actual message text is sent as the attachment. If users receive emails where the message and the attachment are reversed, you may need to configure the Distribution Service to override the content type for those attachments' file formats.

**Note:** E-Forms are one example of documents with a file format that may be handled incorrectly. By default, the Distribution Service's configuration file is configured to override the content type on E-Forms, allowing them to be sent correctly as attachments.

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:



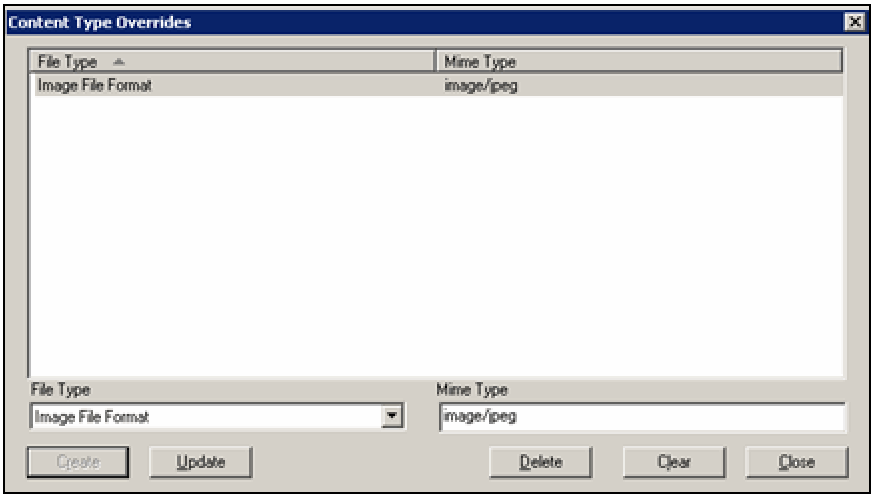
2. Click **Content Type Overrides**. The **Content Type Overrides** dialog box is displayed.




3. From the File Type drop-down list, select the file type that needs to be overridden.
4. In the Mime type field, enter the generic MIME type to label attachments that have the specified file format. Override options include:
   - application/octet-stream
   - application/pdf
   - application/rtf
   - application/soap+xml
   - application/zip
   - image/gif
   - image/jpeg
   - image/tiff
   - text/html
   - text/plain
   - text/richtext
   - text/xml

**Note:** If necessary, click **Clear** to clear the contents of the Mime Type field.

5. Click **Create**. The override is listed in the dialog box.




You can do any of the following if needed:

- **Update**. Click to update the override. The **Mime Type** field is activated, allowing you to modify the information.
- **Delete**. Click to delete the override.

6. Click **Close** to close the **Content Type Overrides** dialog box.

## Unity Forms Limitations

- When Unity Forms are sent using the Distribution Service, section and page security configured on a Unity Form is not respected. The entire form is sent regardless of the security settings on the form.
- When Unity Forms are sent using the Distribution Service via the right-click **Send to** option, page tabs are not displayed in the form. Instead, the form's pages are displayed laterally.

**Note:** Unity forms are automatically sent as a .tif image when sent through the Distribution Service.

## Windows User Account Control Statement

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

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

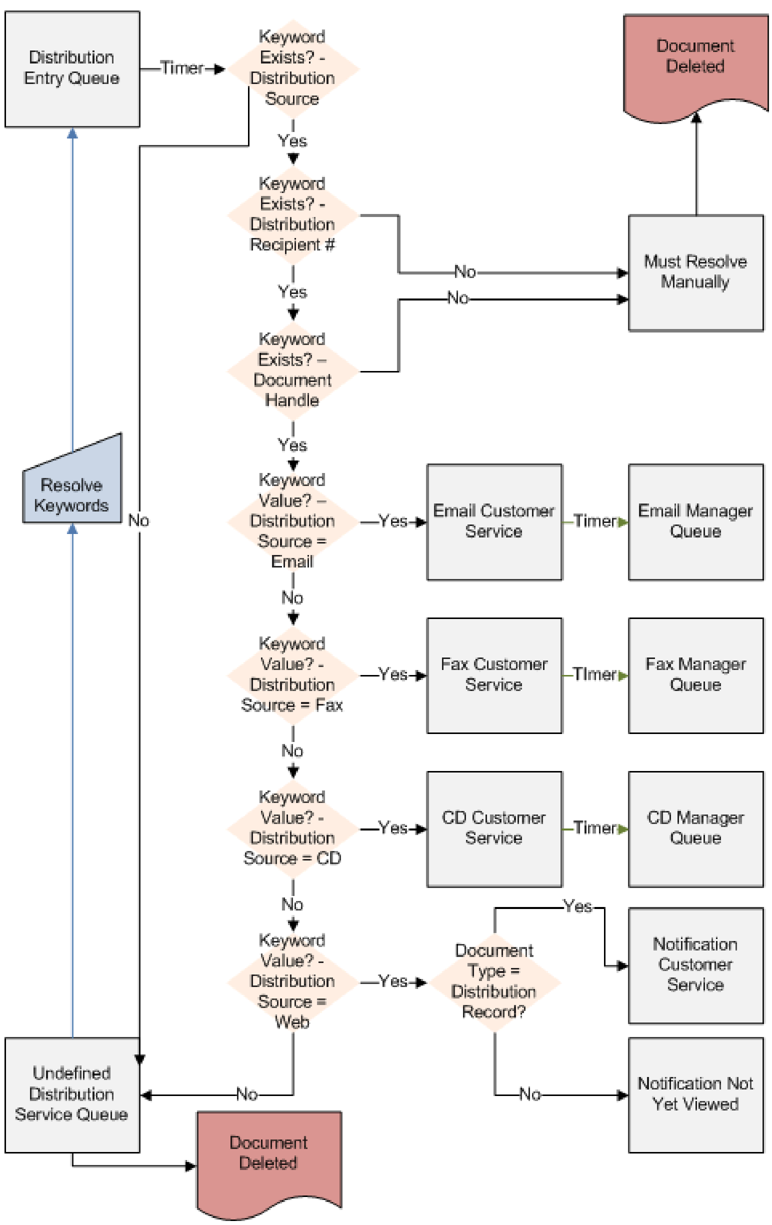
You may encounter UAC in OnBase when:

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

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

# Initial Evaluation

Initially, documents are evaluated to determine what distribution process they must follow. This section describes the Document Distribution Workflow life cycle. The process a document follows is determined by the type of distribution it is associated with. Documents are initially evaluated in the following way, as illustrated in the flow chart.



## Distribution Entry Queue

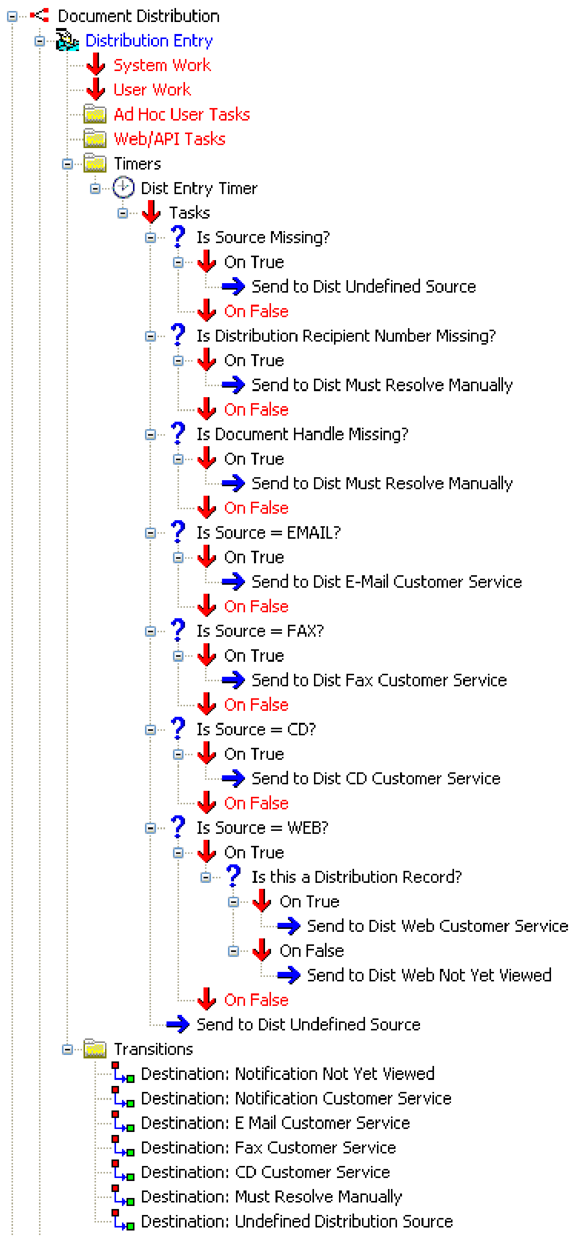
The following is an explanation of the **Distribution Entry** queue process.

Document enters the Document Distribution Workflow life cycle into the **Distribution Entry** queue. The documents will stay in this queue until the timer is executed, which is set to run every 1 minute. Once the timer is executed, the following will be evaluated:

- If the keyword value **Distribution Source** does not exist on the document, it will be sent to the **Undefined Distribution Source** queue. If it does exist, the next task will be executed.
- If the keyword value for **Distribution Recipient Number** does not exist on the document, it will be sent to the **Must Resolve Manually** queue. If it does exist, the next task will be executed.
- If the keyword value for **Document Handle** does not exist on the document, it will be sent to the **Must Resolve Manually** queue. If it does exist, the next task will be executed.
- If the keyword value **Distribution Source** equals **Email**, the documents will be sent to the **E Mail Customer Service** queue. If it does not exist, then next task will be executed.
- If the keyword value **Distribution Source** equals **Fax**, the documents will be sent to the **Fax Customer Service** queue. If it does not exist, then next task will be executed.
- If the keyword value **Distribution Source** equals **CD**, the documents will be sent to the **CD Customer Service** queue. If it does not exist, then next task will be executed.
- If the keyword value **Distribution Source** equals **Web**, the document will be checked to verify that it has the Document Type equal to **Distribution Record**. If this is true, the document will be sent to the **Notification Customer Service** queue. If this is not true, the document will be sent to the **Notification Not Yet Viewed** queue. If the keyword value **Distribution Source** does not equal **Web**, the document will be sent to the **Undefined Distribution Source** queue.

## Configuration

The following is a screen shot of the Studio configuration of the Distribution Entry queue:




# Undefined Distribution Service Queue

There are two ad hoc tasks that can be performed in this queue:

## Correct Missing Keywords

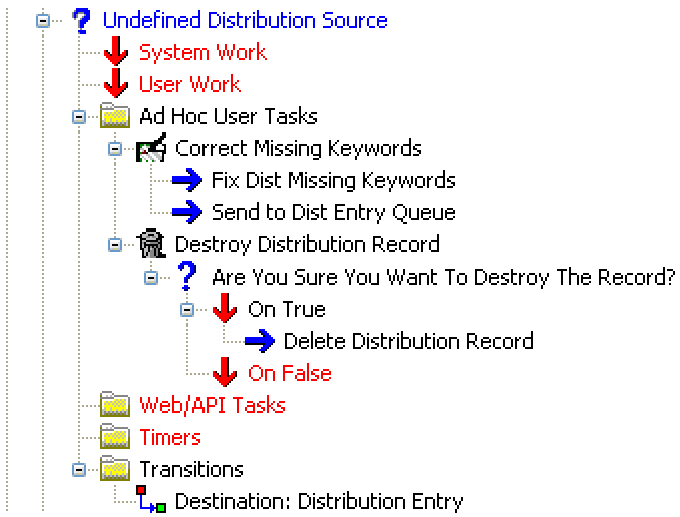
The user can correct the missing keywords and send the document back to the **Distribution Entry** queue to be processed again through timer work.

## Destroy Distribution Record

The user can elect to destroy the document. The user will be prompted with the question "Are you sure you want to destroy this record?" If yes is selected, the document will be deleted. If no is selected, the document will remain in the **Undefined Distribution Service** queue until the missing keywords issue is resolved.

## Configuration

The following is a screen shot of the Studio configuration of the Undefined Distribution Source queue:




# Must Resolve Manually Queue

There are two ad hoc tasks that can be performed in this queue:

## Destroy Distribution Record

The user can elect to destroy the document. The user will be prompted with the question "Are you sure you want to destroy this record?" If yes is selected, the document will be deleted. If no is selected, the document will remain in the **Must Resolve Manually** queue until resolved.

## Resolved This Item

If the keyword value for **Distribution Source** is equal to **CD**, then the next question "Did you mail this CD to the customer" will be asked. If the answer is yes, the next question "Do you need to bill this customer for the CD?" will be asked. If yes, the next question "Did you bill the customer for the CD?" will be asked. If yes, the document will be sent to the **Distribution Resolved** queue.

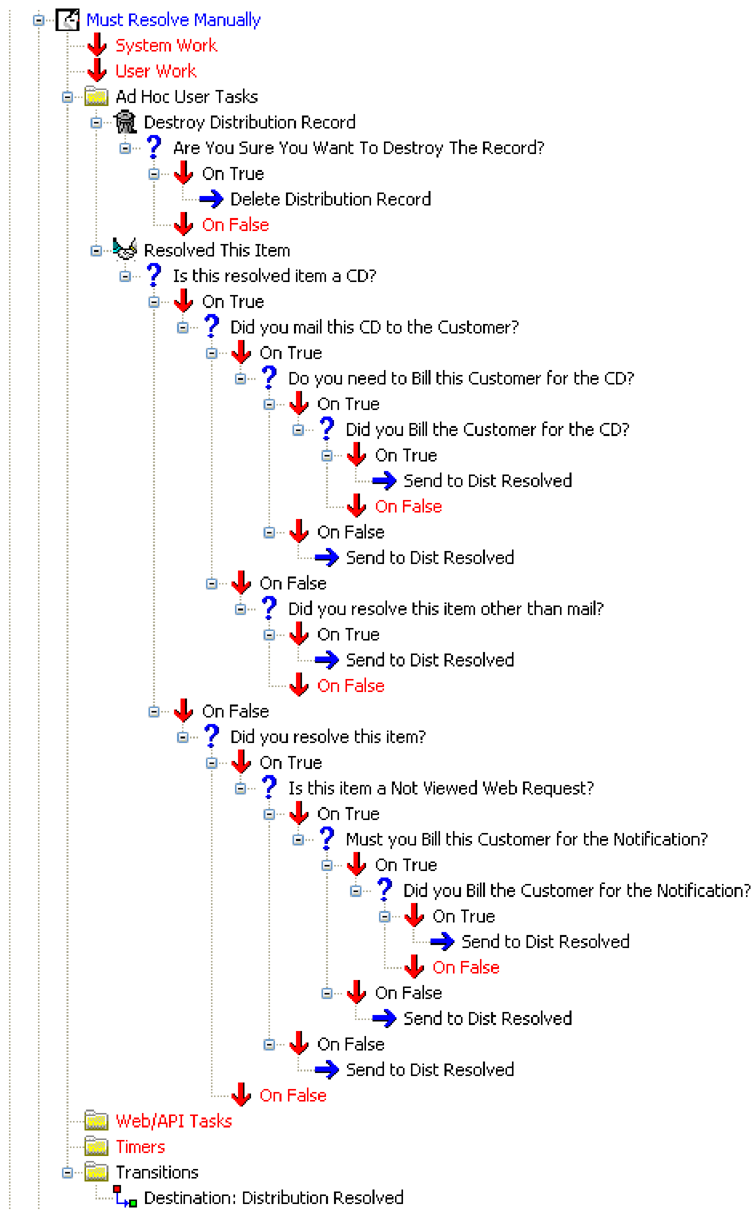
If the answer to the question "Did you mail this CD to the Customer?" is no, the next question "Did you resolve this item some way other than mailing the CD?" will be asked. If yes, the document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **Must Resolve Manually** queue until resolved.

If the answer to the question "Do you need to bill this customer for the CD?" is no, the document will be sent to the **Distribution Resolved** queue.

If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **Must Resolve Manually** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don’t view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **Must Manually Resolve** queue. If yes, the document is sent to the **Distribution Resolved** queue.

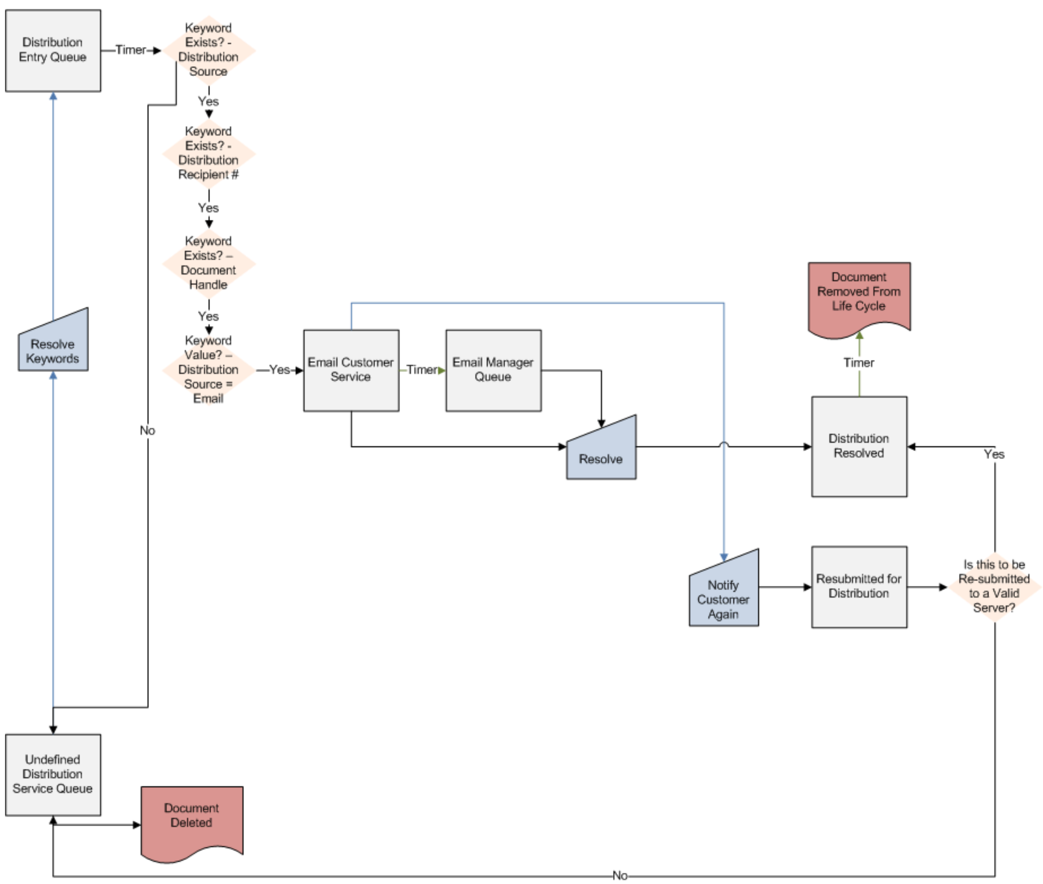
## Configuration

The following is a screen shot of the Studio configuration of the Must Resolve Manually queue:



# Email Distribution

The following chart and queue descriptions outline the process for a document distributed via email.




## E Mail Customer Service Queue

There are three ad hoc tasks that can be performed in this queue. There is a timer on this queue that if after 4 hours the issues are not resolved with the documents in this queue they will be routed to the **E Mail Manager** queue.

### Resolved This Item

The user is asked "Is this resolved item a CD?" If yes, "Did you mail this CD to the customer?" If no, "Did you resolve this item some way other than mailing the CD?" If yes, the document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **E Mail Customer Service** queue.

If the answer to "Did you mail this CD to the Customer?" is yes, then the next question "Do you need to bill this customer for the CD?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, "Did you bill the customer for the CD?" If yes, the document is sent to the **Distribution Resolved** queue. If no, the document remains in the **E Mail Customer Service** queue.

If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **E Mail Customer Service** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don’t view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **Email Customer Service** queue. If yes, the document is sent to the **Distribution Resolved** queue.

## Route to Email Manager

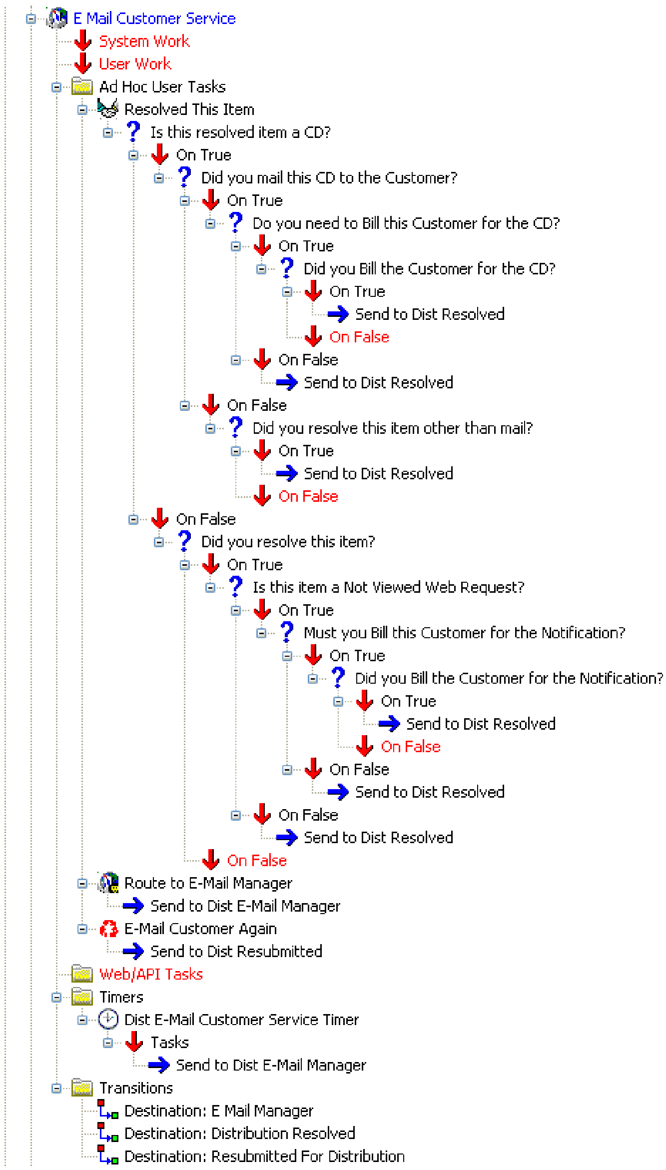
The user can elect to send the document to the **E Mail Manager** queue for manager review.

## Email Customer Again

The user can elect to email the customer again. The document will be sent to the **Resubmitted for Distribution** queue.

## Configuration

The following is a screen shot of the Studio configuration of the E Mail Customer Service queue:




# E Mail Manager Queue

There are two ad hoc tasks that can be performed in this queue.

## Resolved This Item

The user is asked "Is this resolved item a CD?" If yes, "Did you mail this CD to the customer?" If no, "Did you resolve this item some way other than mailing the CD?" If yes, then the document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **E Mail Manager** queue.

If the answer to "Did you mail this CD to the customer?" is yes, then the next question "Do you need to bill this customer for the CD?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, "Did you bill the customer for the CD?" If yes, the document is sent to the **Distribution Resolved** queue. If no, the document remains in the **E Mail Manager** queue.

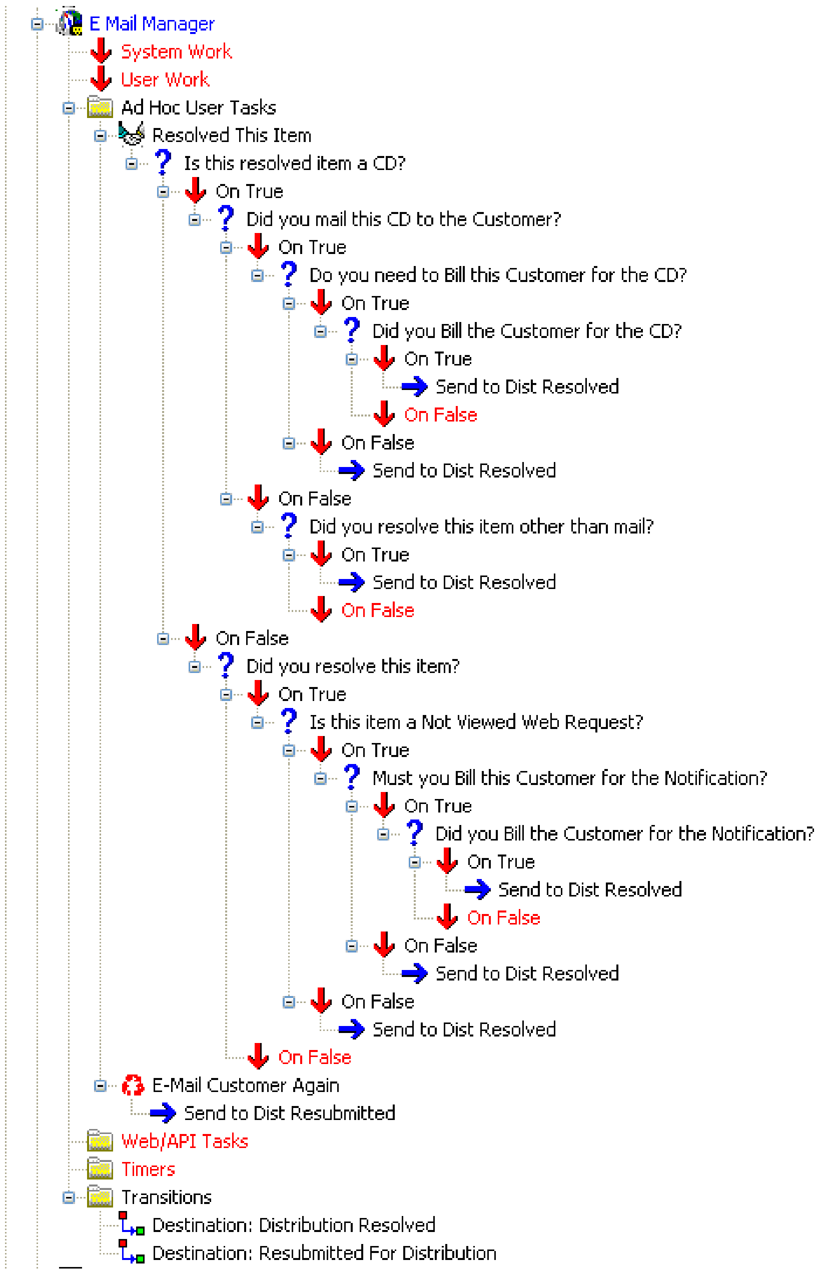
If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **E Mail Manager** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don’t view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **Email Manager** queue. If yes, the document is sent to the **Distribution Resolved** queue.

## Email Customer Again

The user can elect to email the customer again. The document will be sent to the **Resubmitted for Distribution** queue.

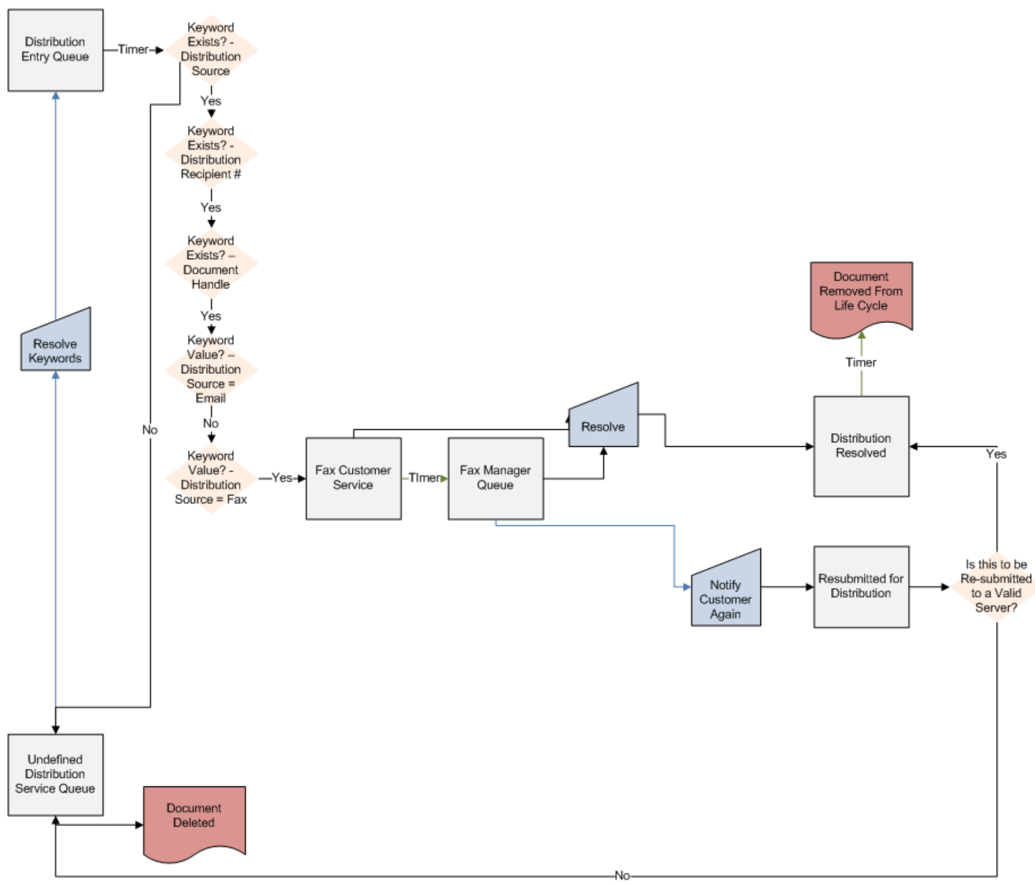
# Configuration

The following is a screen shot of the Studio configuration of the E Mail Manager queue:



# Fax Distribution

The following chart and queue descriptions outline the process for a document distributed via fax.




## Fax Customer Service Queue

There are three ad hoc tasks that can be performed in this queue. There is a timer on this queue that if after 4 hours the issues are not resolved with the documents in this queue they will be routed to the **Fax Manager** queue.

### Resolved This Item

The user is asked "Is this resolved item a CD?" If yes, "Did you mail this CD to the Customer?" If no, "Did you resolve this item some way other than mailing the CD?" If yes, then the document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **Fax Customer Service** queue.

If the answer to "Did you mail this CD to the Customer?" is yes, the next question "Do you need to bill this customer for the CD?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, "Did you bill the customer for the CD?" If yes, the document is sent to the **Distribution Resolved** queue. If no, the document remains in the **Fax Customer Service** queue.

If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **Fax Customer Service** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don’t view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **Fax Customer Service** queue. If yes, the document is sent to the **Distribution Resolved** queue.

## Route to Email Manager

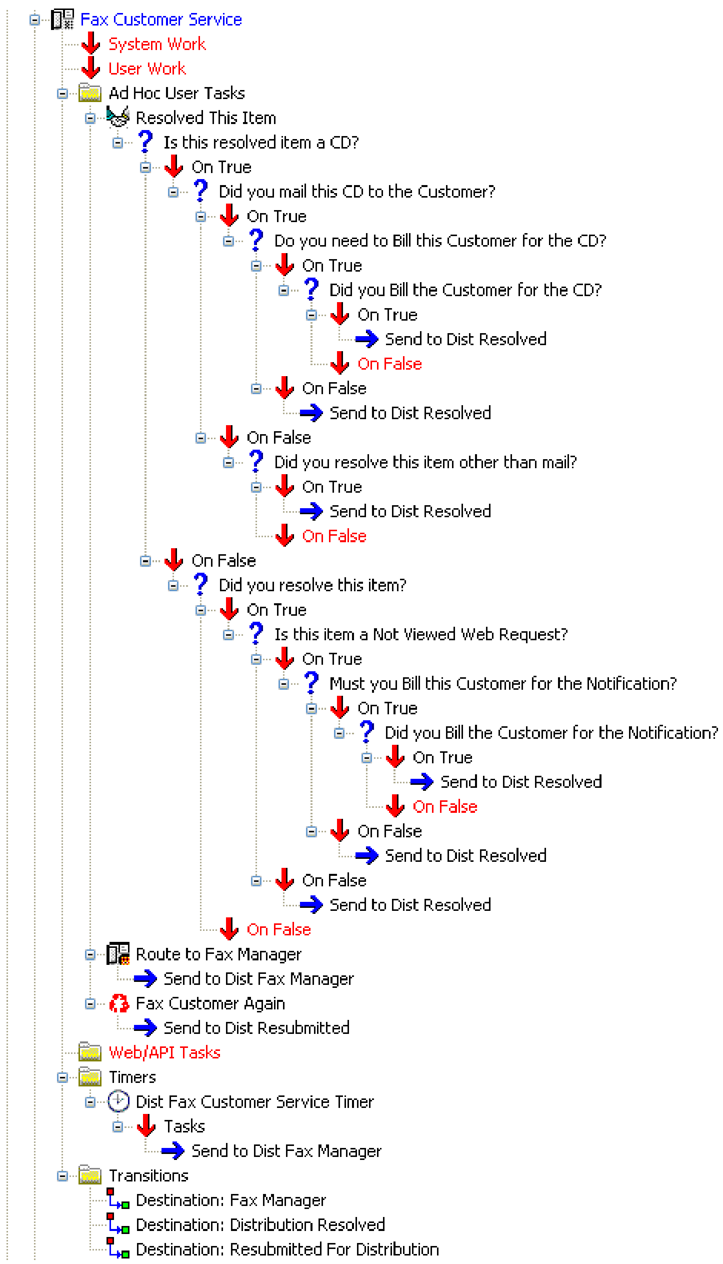
The user can elect to send the document to the **Fax Manager** queue for manager review.

## Fax Customer Again

The user can elect to fax the customer again, the document will be sent to the **Resubmitted for Distribution** queue.

## Configuration

The following is a screen shot of the Studio configuration of the Fax Customer Service queue:




# Fax Manager Queue

There are two ad hoc tasks that can be performed in this queue.

## Resolved This Item

The user is asked "Is this resolved item a CD?" If yes, "Did you mail this CD to the Customer?" If no, "Did you resolve this item some way other than mailing the CD?" If yes, then the document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **Fax Manager** queue.

If the answer to "Did you mail this CD to the Customer?" is yes, the next question "Do you need to bill this customer for the CD?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, "Did you bill the customer for the CD?" If yes, the document is sent to the **Distribution Resolved** queue. If no, the document remains in the **Fax Manager** queue.

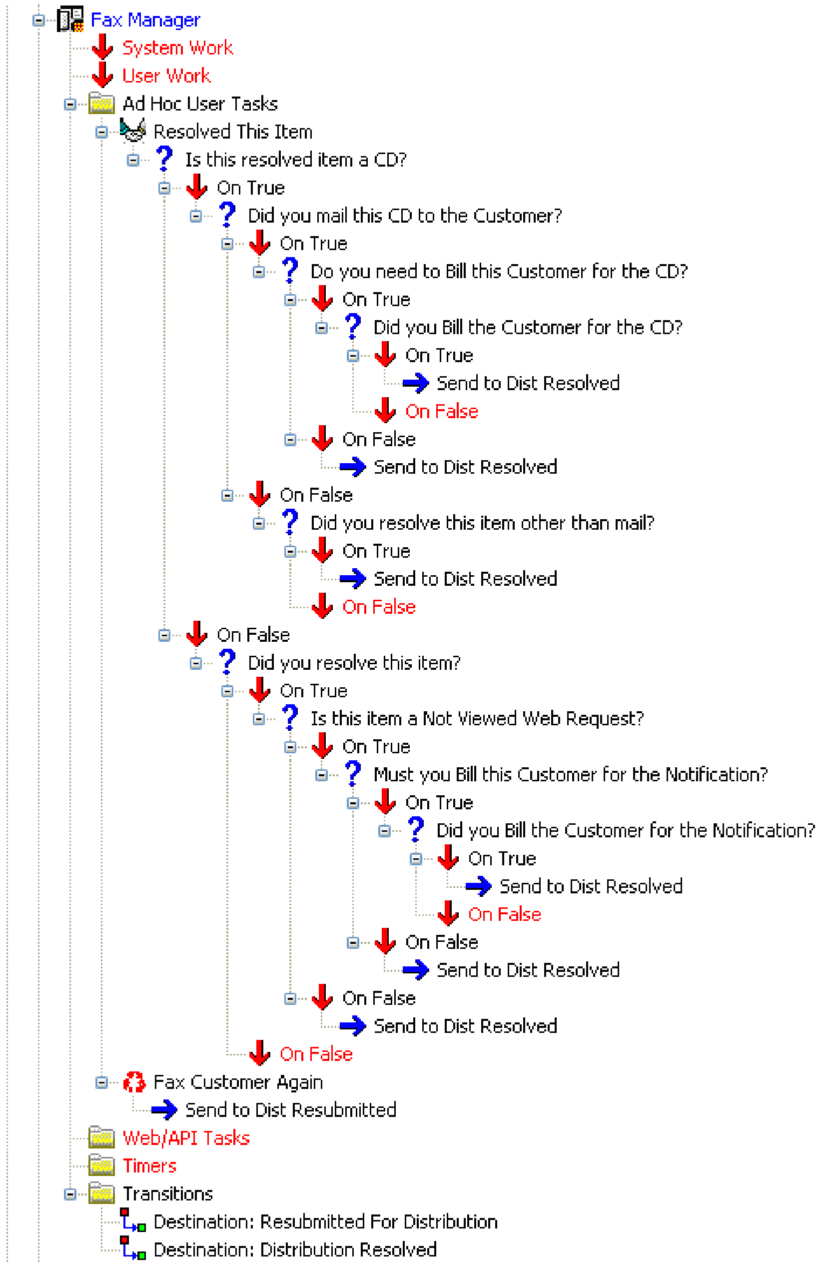
If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **Fax Manager** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don’t view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **Fax Manager** queue. If yes, the document is sent to the **Distribution Resolved** queue.

## Fax Customer Again

The user can elect to fax the customer again, the document will be sent to the **Resubmitted for Distribution** queue.

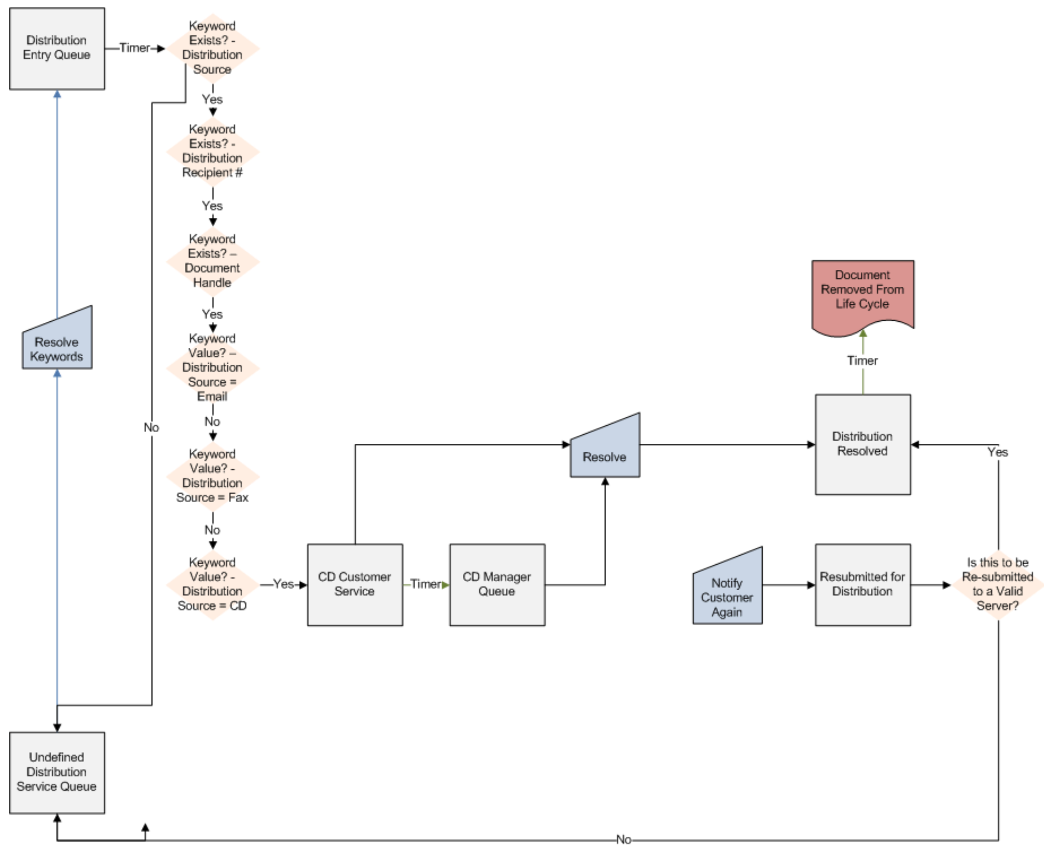
# Configuration

The following is a screen shot of the Studio configuration of the Fax Manager queue:



# CD Distribution

The following chart and queue descriptions outline the process for a document distributed via CD.




## CD Customer Service Queue

There are two ad hoc tasks that can be performed in this queue. There is a timer on this queue that if after 4 hours the issues are not resolved with the documents in this queue they will be routed to the **CD Manager** queue.

### Resolved This Item

The user is asked "Is this resolved item a CD?" If yes, "Did you mail this CD to the customer?" If no, "Did you resolve this item some way other than mailing the CD?" If yes, then the document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **Fax Customer Service** queue.

If the answer to "Did you mail this CD to the customer?" is yes, then the next question "Do you need to bill this customer for the CD?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, "Did you bill the customer for the CD?" If yes, the document is sent to the **Distribution Resolved** queue. If no, the document remains in the **CD Customer Service** queue.

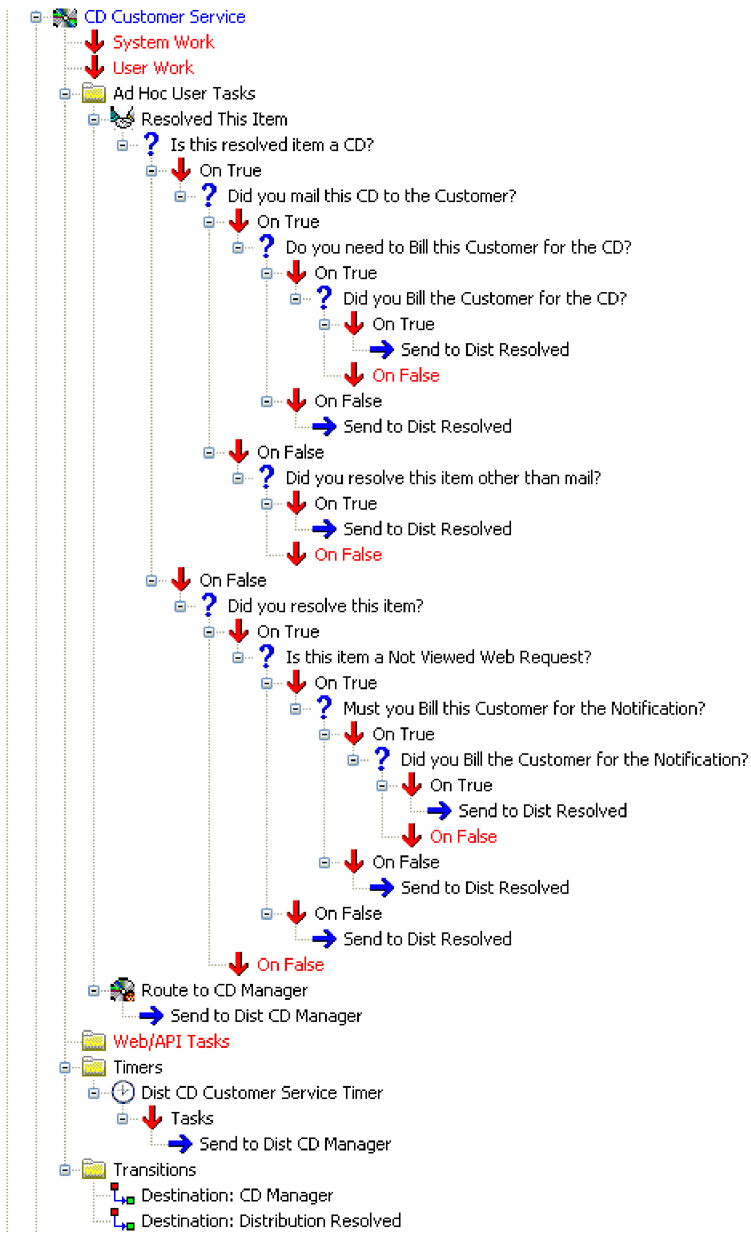
If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **CD Customer Service** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don’t view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **CD Customer Service** queue. If yes, the document is sent to the **Distribution Resolved** queue.

## Route to Email Manager

The user can elect to send the document to the **CD Manager Queue** for manager review.

## Configuration

The following is a screen shot of the Studio configuration of the CD Customer Service queue:




# CD Manager Queue

There is one ad hoc task that can be performed in this queue.

## Resolved This Item

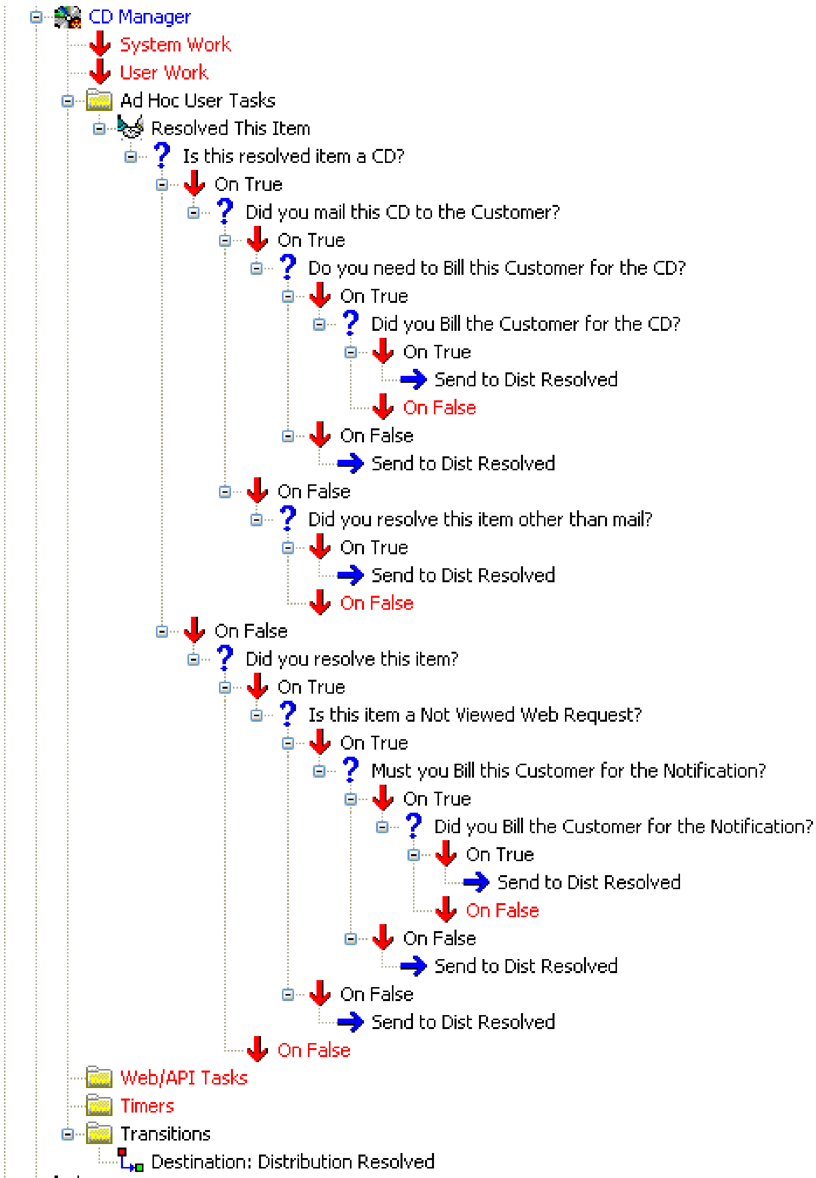
The user is asked "Is this resolved item a CD?" If yes, "Did you mail this CD to the customer?" If no, "Did you resolve this item some way other than mailing the CD?" If yes, then document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **CD Manager** queue.

If the answer to "Did you mail this CD to the customer?" is yes, the next question "Do you need to bill this customer for the CD?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, "Did you bill the customer for the CD?" If yes, the document is sent to the **Distribution Resolved** queue. If no, the document remains in the **CD Manager** queue.

If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **CD Manager** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don’t view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **CD Manager** queue. If yes, the document is sent to the **Distribution Resolved** queue.

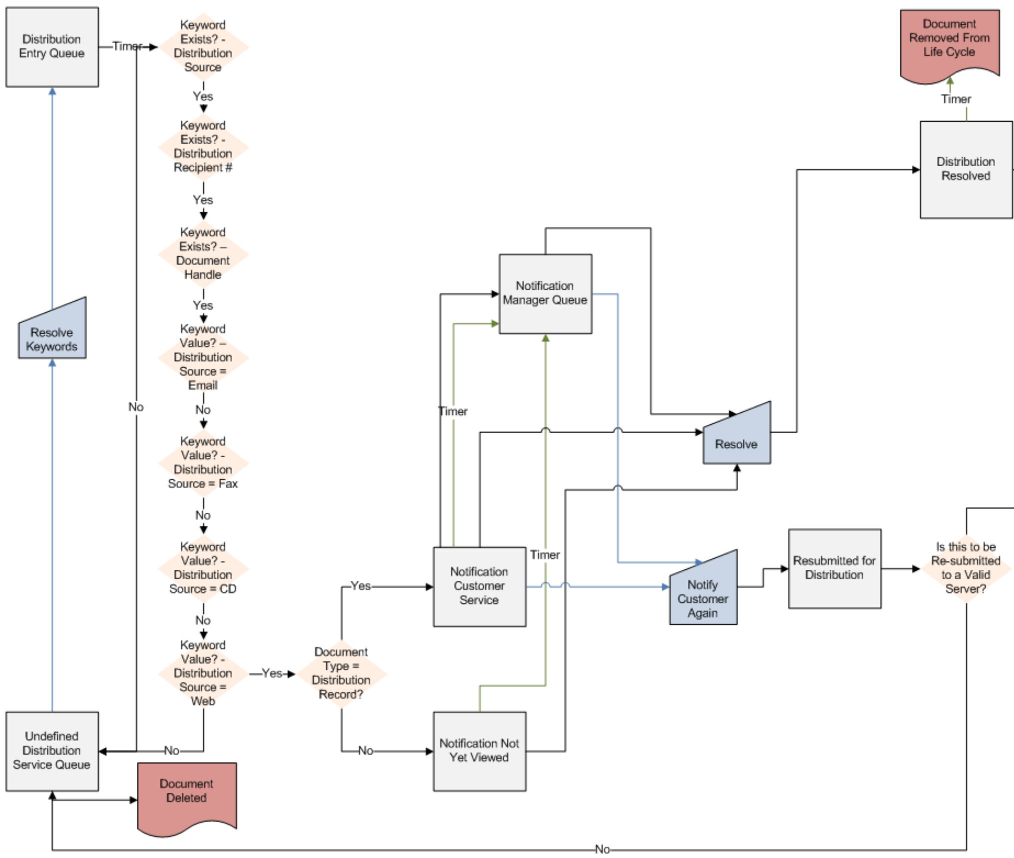
## Configuration

The following is a screen shot of the Studio configuration of the CD Manager queue:



# Web Distribution

The following process is followed when the distribution uses a web method.

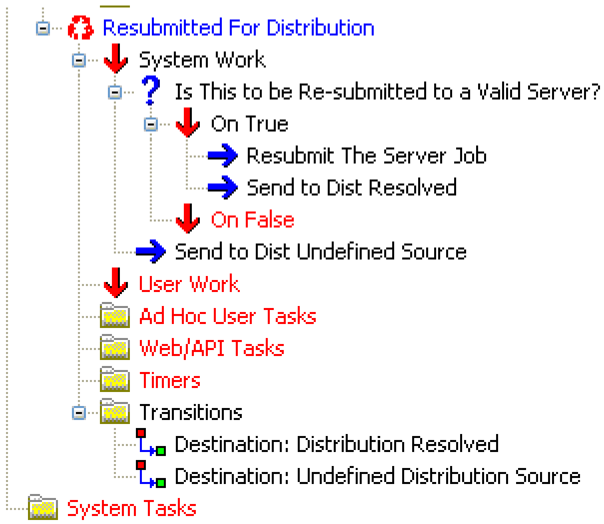



## Resubmitted For Distribution Queue

The question is asked "Is this to be re-submitted to a valid server? If yes, the document is sent to the **Distribution Resolved** queue. If no, document is sent to the **Undefined Distribution Source** queue.

## Configuration

The following is a screen shot of the Studio configuration of the Resubmitted For Distribution queue:




# Notification Not Yet Viewed Queue

There are two ad hoc tasks that can be performed in this queue. There is a timer on this queue that if after 4 hours the issues are not resolved with the documents in this queue they will be routed to the **Notification Manager** queue.

## Resolved this Item

The user is asked "Is this resolved item a CD?" If yes, "Did you mail this CD to the customer?" If no, "Did you resolve this item some way other than mailing the CD?" If yes, the document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **Notification Not Yet Viewed** queue.

If the answer to "Did you mail this CD to the Customer?" is yes, the next question "Do you need to bill this customer for the CD?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, "Did you bill the customer for the CD?" If yes, the document is sent to the **Distribution Resolved** queue. If no, the document remains in the **Notification Not Yet Viewed** queue.

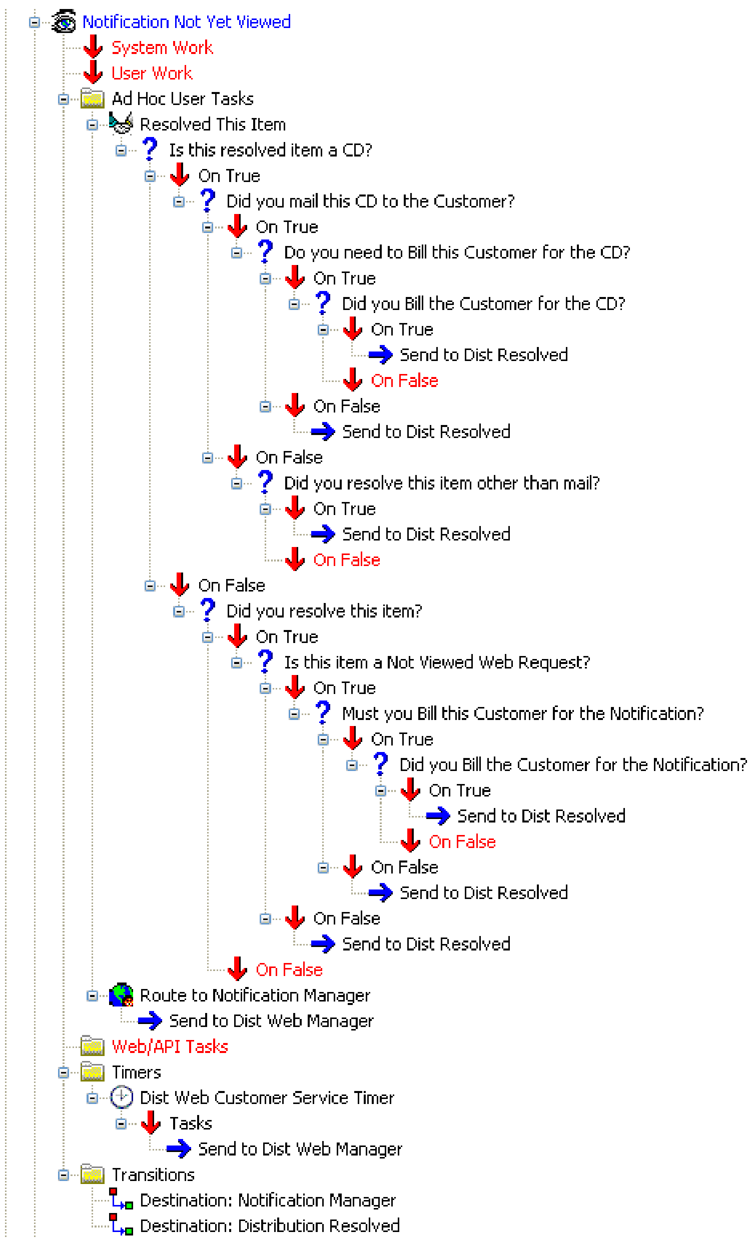
If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **Notification Not Yet Viewed** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don't view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **Notification Not Yet Viewed** queue. If yes, the document is sent to the **Distribution Resolved** queue.

## Route to Notification Manager Queue

The user can elect to send a specific notification from this queue to a manager for processing.

## Configuration

The following is a screen shot of the Studio configuration of the Notification Not Yet Viewed queue:



# Notification Customer Service Queue

There are three ad hoc tasks that can be performed in this queue. There is a timer on this queue that if after 4 hours the issues are not resolved with the documents in this queue they will be routed to the **Notification Manager** queue.

## Resolved this Item

The user is asked "Is this resolved item a CD?" If yes, "Did you mail this CD to the customer?" If no, "Did you resolve this item some way other than mailing the CD?" If yes, then document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **Notification Customer Service** queue.

If the answer to "Did you mail this CD to the customer?" is yes, then the next question "Do you need to bill this customer for the CD?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, "Did you bill the customer for the CD?" If yes, the document is sent to the **Distribution Resolved** queue. If no, the document remains in the **Notification Customer Service** queue.

If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **Notification Not Yet Viewed** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don’t view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **Notification Customer Service** queue. If yes, the document is sent to the **Distribution Resolved** queue.

## Notify Customer Again

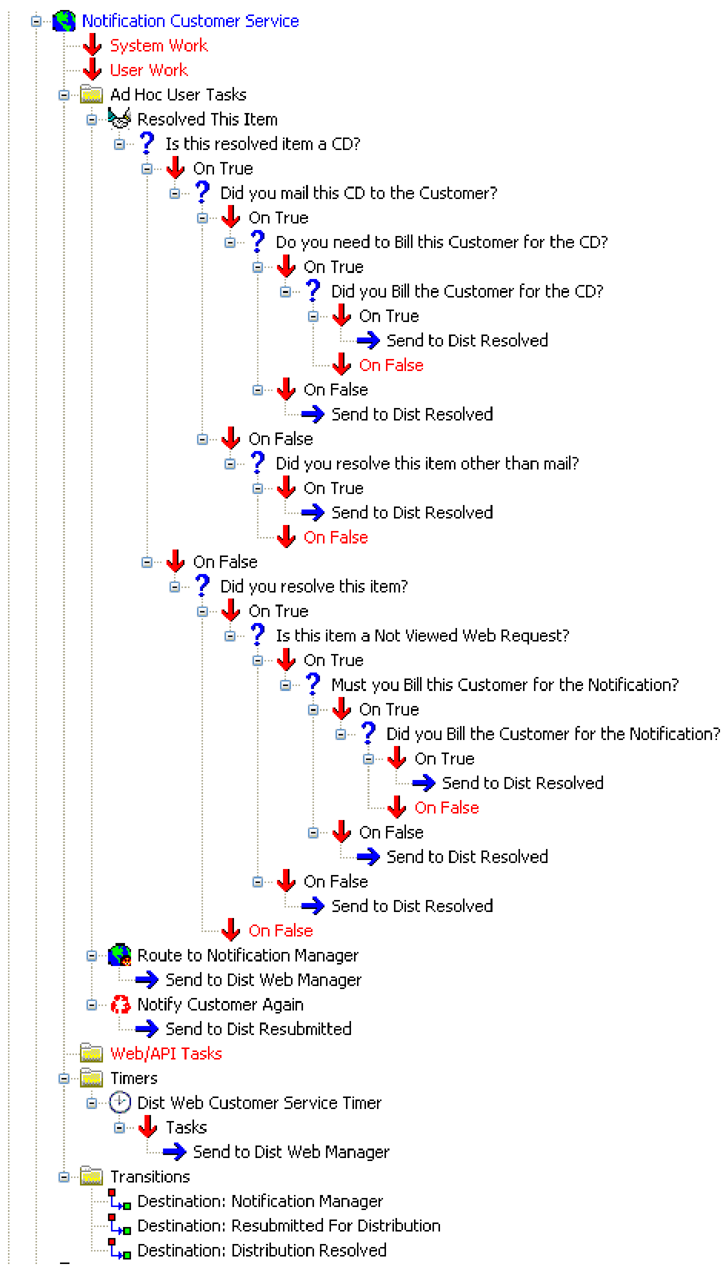
The user can elect to notify the customer again. The document will be sent to the **Resubmitted for Distribution** queue.

## Route to Notification Manager Queue

The user can elect to send a specific notification from this queue to a manager for processing.

## Configuration

The following is a screen shot of the Studio configuration of the Notification Customer Service queue:




# Notification Manager Queue

There are two ad hoc tasks that can be performed in this queue.

## Resolved This Item

The user is asked "Is this resolved item a CD?" If yes, "Did you mail this CD to the customer?" If no, "Did you resolve this item some way other than mailing the CD?" If yes, the document will be sent to the **Distribution Resolved** queue. If no, the document will remain in the **Notification Manager** queue.

If the answer to "Did you mail this CD to the Customer?" is yes, the next question "Do you need to bill this customer for the CD?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, "Did you bill the customer for the CD?" If yes, the document is sent to the **Distribution Resolved** queue. If no, the document remains in the **Notification Manager** queue.

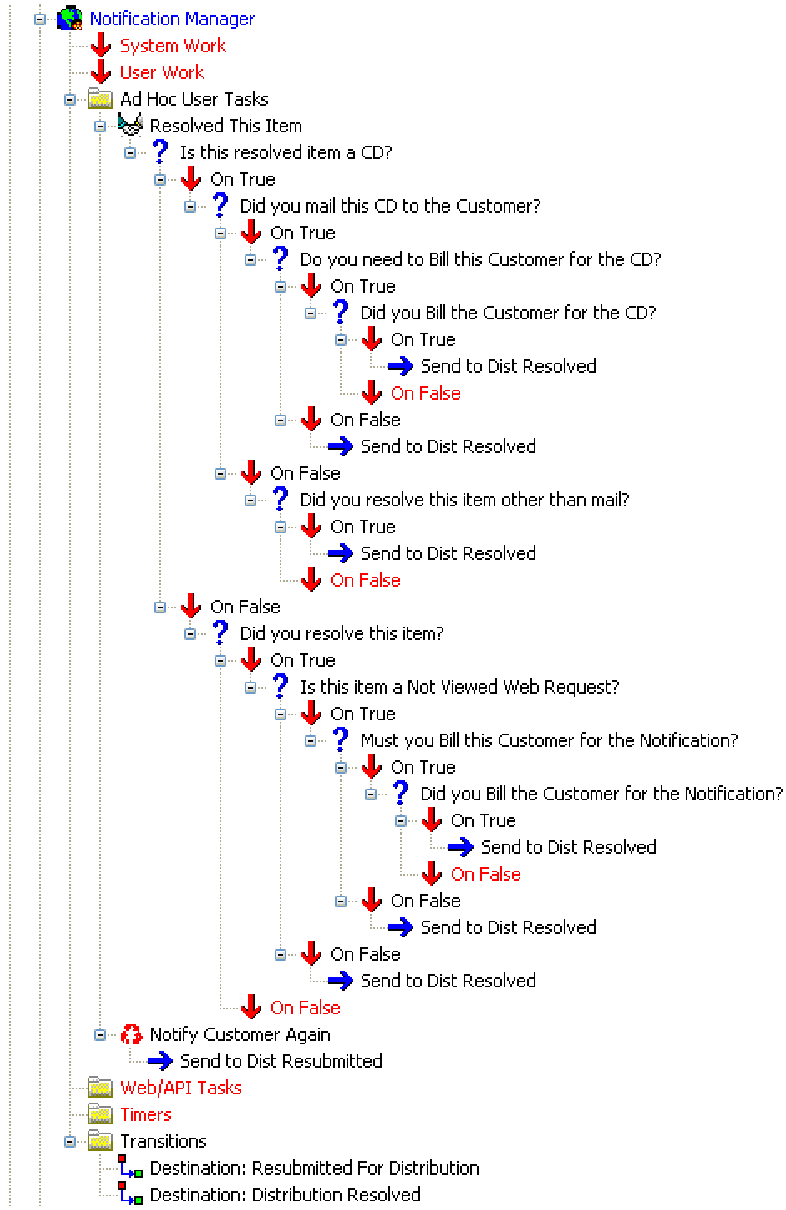
If the keyword value for **Distribution Source** is not equal to **CD**, the question will be asked "Did you resolve this item by supplying the distribution to the customer?" If no, the document will remain in the **Notification Manager** queue. If yes, the question "Is this item a Not Viewed Web Request?" If no, document will be sent to the **Distribution Resolved** queue. If yes, the question "Do you need to bill this customer when they don’t view their distribution over the web?" If no, the document will be sent to the **Distribution Resolved** queue. If yes, the question "Did you bill the customer for the notification?" If no, the document remains in the **Notification Manager** queue. If yes, the document is sent to the **Distribution Resolved** queue.

## Notify Customer Again

The user can elect to notify the customer again. The document will be sent to the **Resubmitted for Distribution** queue.

## Configuration

The following is a screen shot of the Studio configuration of the Notification Manager queue:

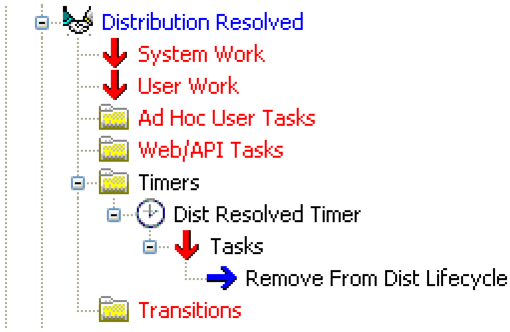



# Resolved Issues

When documents have had issues that have been resolved, they are sent to the **Distribution Resolved** queue. There is a timer on this queue that after 7 days the documents are removed from the Document Distribution life cycle.

## Configuration

The following is a screen shot of the Studio configuration of the Distribution Resolved queue:



# Document Distribution

## User Guide

Foundation EP5

# Usage - Client Module

## Log On to the Client

Document Distribution is initiated in the OnBase Client. The first step is to log on to the OnBase Client as a member of a user group that can perform Document Distribution.

## Register the Workstation

Workstations that are managing the Document Distribution life cycle must be registered as Workflow Users. Stations used for performing Publishing to CD need to be registered for Automated CD Authoring. Log on to the OnBase Client and choose **Admin | User Management | Workstation Registration** at the menu bar. Register the appropriate registrations:

No workstation registration is required for Document Distribution.

## Document Distribution Workflow Configuration

A Workflow is provided with the Document Distribution module that allows failed jobs to be tracked and resolved. The Workflow queues must be uniquely configured to use specific E-Forms, and must be assigned the appropriate user group rights.

To configure the Document Distribution Workflow:

1. Extract the Document Distribution Workflow zip file into a temporary folder. This zip file contains the Workflow file DOCDIST.WKF that is imported along with these instructions and all bitmap icons and HTML documents that support the Workflow. It is important that these files are kept in their relative folders and that the DOCDIST.WKF file be imported from this temporary location. When the Workflow is imported these files can be removed from the system.
2. Log on to OnBase Studio.
3. From the **Home** tab, click **Import**. A warning that the database should be backed up prior to proceeding is displayed.
4. Enter the backup information. The **Import** dialog box is displayed.
5. Click **Browse** and locate the DOCDIST.WKF file that you extracted from the zip file. Double-click the DOCDIST.WKF file to populate with the directory and file name.
6. Click **Next** and the **Resolutions** screen is displayed.
7. Choose how you would like resolutions to be handled.
8. Click **Next** to view the import **Summary**.
9. Click **Finish** to begin the import process.
10. When the import is completed, exit out of OnBase Studio.

11. Log on to the Configuration module.
12. Select **Users | User Groups / Rights** at the menu bar. The **User Groups & Rights** dialog box is displayed.
13. Select the name of the user group that utilizes the Workflow.
14. Click **Document Types**. The **Assigning Document Types for User Group Name Group** dialog box is displayed.
15. Select the **Document Distribution Group** and all the document types (**Distribution Record**, **Notification Not Yet Viewed Record**, and **Produced CD Record**) used within the Document Distribution Workflow are automatically selected.
16. Click **Close**, then **Exit**.
17. At the Configuration main menu bar, choose **Document | Document Types** at the menu bar.
18. The **Document Types** dialog box is displayed. Highlight the **Distribution Record** document type and select Settings to display the **Distribution Record Configuration** dialog box will appear.
19. Choose a default disk group from the **Default Disk Group** list. Select **Save & Close**.
20. At the **Document Types** dialog box, highlight the **Distribution Record** Document Type and select E-Form to display the **E-Form Options** dialog box. At the Electronic Form drop-down list, select the form named **SYS – HTML Forms Distribution Record**. Choose **Save**, then **Close**.
21. At the **Document Types** dialog box, select the **Notification Not Yet Viewed Record** document type and click **Settings** to display the **Notification Not Yet Viewed Record Configuration** dialog box will appear.
22. Choose a default disk group from the **Default Disk Group** list. Select **Save**, then **Close**.
23. At the **Document Types** dialog box, highlight the **Notification Not Yet Viewed Record** document type and select **E-Form** to display the **E-Form Options** dialog box.
24. At the **Electronic Form** drop-down list, select the form named **SYS – HTML Forms Notification Not Yet Viewed Record**. Choose **Apply**, then **Close**.
25. At the **Document Types** dialog box, highlight the **Produced CD Record** document type and click **Settings** to display the **Produced CD Record Configuration** dialog box.
26. Choose a default disk group from the **Default Disk Group** list. Click **Save & Close**.
27. At the **Document Types** dialog box, highlight the **Produced CD Record** document type and select **E-Form** to display the **E-Form Options** dialog box. At the **Electronic Form** drop-down list, select the form named **SYS – HTML Forms Produced CD Record**. Choose **Save**, then **Close**.
28. If you will be distributing notifications to inform customers that their statements are ready for download from a designated area, such as a web site, you have the option to track whether the document has been viewed or not. The **View Status** keyword can be added to the document type that you have defined for the completed rendered statement.

29. Choose the document type that you have defined for the completed rendered statement in the **Document Types** dialog box. Select **Keyword Types** to display the **Keyword Type Assignment** dialog box. In the **Available** section of the dialog box, select the **View Status** Keyword Type, then click **Add >>**, then **Save**.

**Note:** When implementing your method for setting this keyword to indicate that the rendered statement is viewed (API or VB Script) set the keyword value to 1. This indicates to the system that the rendered statement has been viewed. If a value is not set or is set to 0 then it indicates that the document has not yet been viewed. The Email distribution server will set the value to 0 if no value has been set on the document and the first iteration of Notification checking has occurred on the document.

## Configuring Rights to the Workflow

To grant rights to the Document Distribution life cycle and work queues:

1. Select **Users | User Groups & Rights** at the menu bar. The **User Groups & Rights** dialog box is displayed. Highlight the user group and select **Workflow** to display the **Assigning Workflow for User Group** dialog box.
2. Select **Document Distribution** from the **Life Cycle** list in the **Available** for **Selection** section. The associated work queues become highlighted in the **Work Queue** list. Click **Add** to assign the Document Distribution life cycle and the associated work queues to the user group. Click **Save & Close**.
3. Specifically, the following work queues are assigned as part of the Document Distribution life cycle:
   - CD Customer Service
   - Distribution Entry
   - Distribution Resolved
   - Email Customer Service
   - Fax Customer Service
   - Must Resolve Manually
   - Notification Customer Service
   - Notification Not Yet Viewed
   - Notification Manager
   - Email Manager
   - Fax Manager
   - CD Manager
   - Resubmitted For Distribution
   - Undefined Distribution Source
4. Select **Users | User Groups & Rights** at the Configuration main menu bar. The **User Groups & Rights** dialog box is displayed. Highlight the user group and select **Ad-Hoc User Tasks**. Select the following tasks, click **Add**, then **Save & Close**:
   - Correct Missing Keywords
   - Email Customer Again

- Fax Customer Again
- Notify Customer Again
- Resolved This Item
- Route to CD Manager
- Route to Email Manager
- Route to Fax Manager
- Route to Notification Manager

5. Log on to the OnBase Client module on the workstation that will service the Workflow timers. Choose **User | Workstations Options** at the OnBase Client main menu bar. The **Workstation Options** dialog box is displayed.

**Note:** The workstation that will service the Workflow timers must have the **-WFSRVR** tag appended to the target line of the executable shortcut.

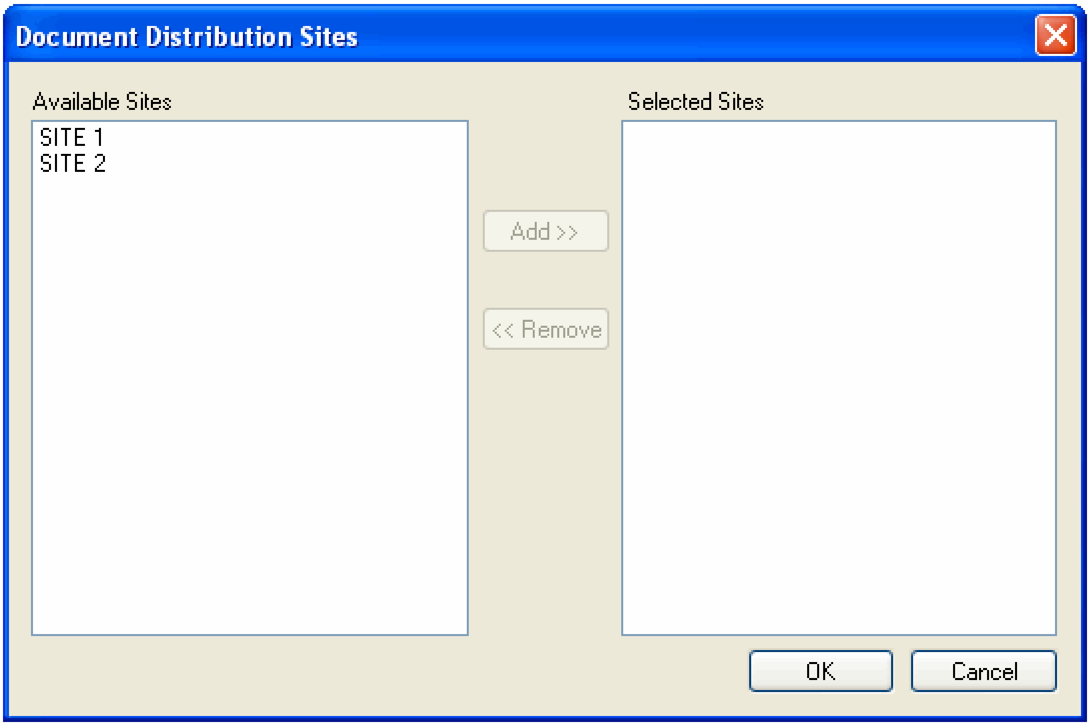
6. Select the **Workflow Server Queues** tab. Choose the following from the Timer Queues select list:
   - CD Customer Service
   - Distribution Entry
   - Distribution Resolved
   - E Mail Customer Service
   - Fax Customer Service
   - Notification Customer Service
   - Notification Not Yet Viewed

   These timers control:
   - The migration of documents from the Entry Queue.
   - The movement of documents from the Customer Service Queues to the Manager Queues after 4 hours.
   - The removal of documents from the Workflow after 7 days.
7. When finished, click **OK** to save and close.

# Assigning Distribution Sites to a Workstation

You can assign workstations to process distribution processes associated with specific sites. To assign sites to a workstation:

1. In the OnBase Client, select **Admin | Document Distribution | Distribution Sites**. The **Document Distribution Sites** dialog box is displayed.




2. Select the sites you want to assign to the workstation for processing in the **Available Sites** section.
3. Click **Add**. The selected sites are added to the **Selected Sites** section.
4. Click **OK**.

Workstation processing functions in the following way:

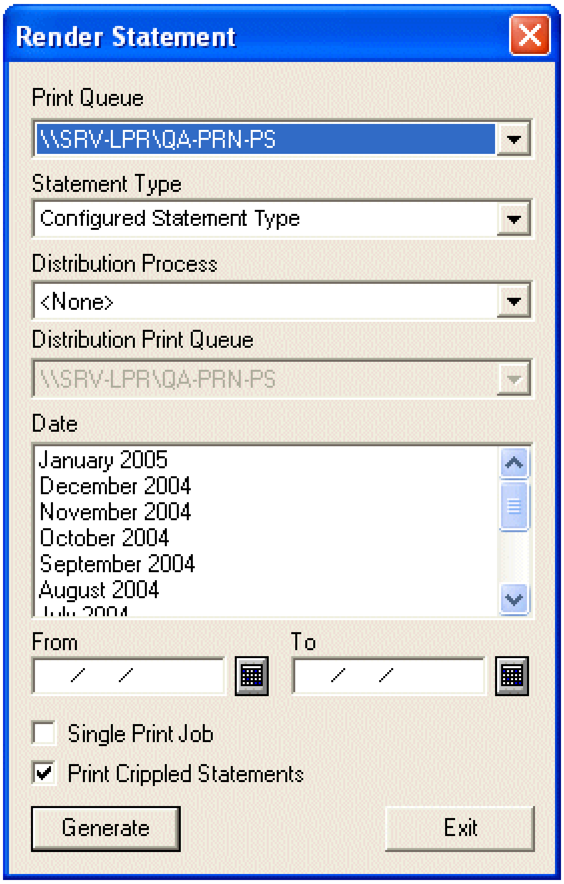
- If no sites are defined in the system, any Client can process any job.
- If at least one site is defined, but no sites assigned to the workstation, the Client only processes jobs that do not have any site specified.
- If at least one site is defined in the system and at least one site is assigned to the workstation, the Client processes any jobs that match the specified sites, as well as jobs that do not have any site specified.

**Note:** Site settings do not apply to printing distribution processes.

# Perform and Manage Document Distribution for Image Statements

1. From the OnBase Client, select a primary document to distribute using one of the following methods:
   - Through the **Document Retrieval** dialog box
   - From a batch of documents within the COLD Processor (**Awaiting Commit** queue)
2. Open the **Render Statement** dialog box.
   - If the primary document is selected in the **Document Retrieval** dialog box, right-click on the selected document and select **Render Statement** from the right-click menu.
   - If the primary document is selected from a batch in the COLD processor, right-click the selected batch and select **Batch Render Statement** from the right-click menu.

   The **Render Statement** dialog is displayed.

   The reason this dialog appears is to select the statement type. After a document is sent successfully or canceled a new document is added to the **Archival** queue.
3. Select the print queue to use for the distribution from the **Print Queue** drop-down list.

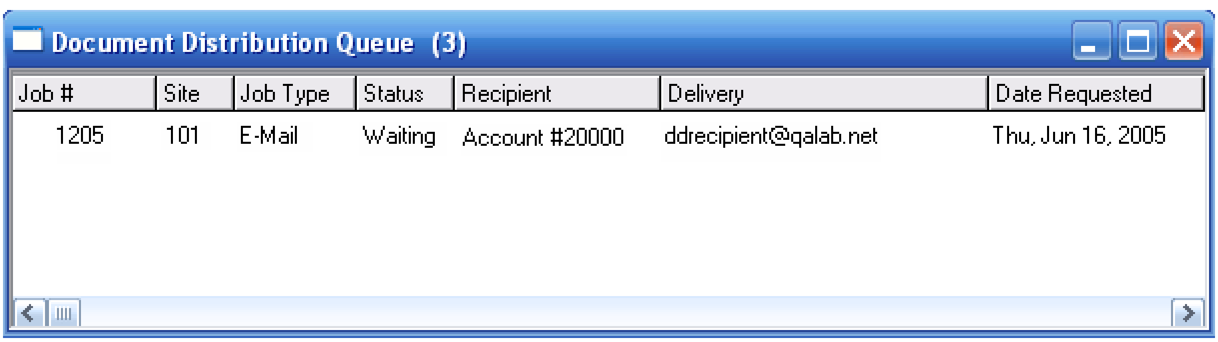
4. Select the statement type for the distribution from the **Statement Type** drop-down list.

**Note:** For more information on configuring a statement type, see the **Image Statements** documentation.

5. Select the appropriate Distribution Process to use for the distribution from the **Distribution Process** drop-down list. The Distribution Process uses the Keyword Types on the primary document to locate the correct recipient and then uses the distribution method associated with this record to distribute the document to the recipient.

**Note:** You must only have one instance of a Customer ID Keyword Type associated with the primary document. If more than one Keyword Type instance exists, the Distribution Process stops and does not distribute the document to the appropriate recipients.

6. In the OnBase Client choose the **Admin | Document Distribution | Distribution Queue** from the menu bar. The **Document Distribution Queue** dialog box will appear. From here you can see all distributions pending or in progress. You can click on the column headers to sort the results. The only column that cannot be used for sorting is the **Delivery** column.




If the keyword values of the primary document and the ID Keyword values for the customer information of the recipient does not match, a **Document failed verification** status is displayed for the distribution process.

The user has the following right-click options in the **Document Distribution Queue** dialog box:

- **Reset Status**
- **Write to CD-R** (see Note below)
- **Edit Recipient** (see Note below)
- **Edit Site** (see Editing Sites on page 236)
- **Locate Job** (see Locating Jobs on page 237)
- **View Selected**
- **Clear Selected**
- **Delete Selected**
- **Refresh**

Upon completion of each job, the entry will be removed from the **Document Distribution Queue** dialog box.

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**Note:** Published CD job types can be written to a manual stand-alone recorder. When job types that are Published CDs are submitted to the **Document Distribution Queue**, the right-click option **Write to CD-R** allows the job to be submitted to a stand-alone recorder. The command line switch **–AUTOWRITECD** cannot be enabled. If the command line switch is enabled, Rimage auto production will occur.

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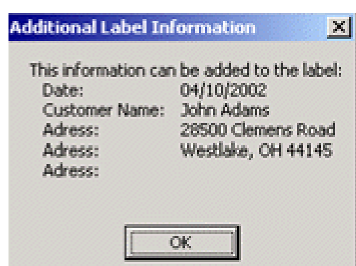
**Note:** Some jobs may be marked as **Awaiting Recipient Password** in the **Document Distribution Queue**. For an Encrypted CD publishing job to complete, each recipient configured for the publishing job must have a password entered into the **Password** field in the **Customer Information** dialog box. To enter this password, right-click the appropriate job and select **Edit Recipient**. The **Customer Information** dialog box will display so a password can be entered. The job will then be set to **Waiting** status. This applies to both manual and automatic Encrypted CD publishing jobs.

---

Upon completion of the CD production, the following dialogs will be displayed to label the CD:

- **Label this CD**


- **Additional Label Information**

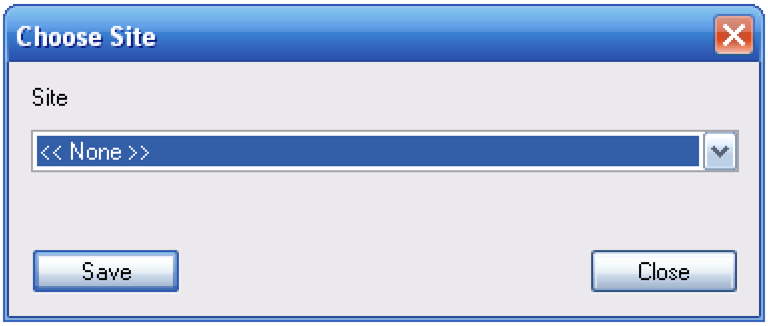



Upon completion of the Published CD, the Job will be removed from the **Document Distribution Queue**.

## Editing Sites

In some instances, the site configured for a distribution process may need to be overridden in an ad hoc manner. To change the site setting for a distribution job:

1. In the **Document Distribution Queue**, select the job you would like to edit.
2. Right-click and select **Edit Site**.The **Choose Site** dialog box is displayed.




3. Select the **Site** from the drop-down that you would like to set for the selected job.
4. Click **Save**.

## Statement Rendering and Distribution Process Flow

If a class of service has not been specified for the distribution process, a comparison of keyword values is performed between the rendered documents and the recipients associated with the Document Distribution process. If a match is made between keyword values on the document(s) and the customer information record, those recipients are sent the documents according to the distribution method set at the distribution process configuration level.

**Note:** If class of service is disabled in the distribution process configuration, but a class of service is configured in the **Customer Information**, that class of service will be ignored. The class of service selected at the Customer Information dialog is only used by the system to determine which class of service to process for a customer when the customer is associated to a distribution process that has multiple classes of service.

If a class of service is assigned to the distribution process, a comparison of keyword values is performed between the rendered documents and the document types assigned to the class of service. If a match is made between keyword values, documents are sent on a document type basis to the associated recipient, according to the distribution method configured for the document type.

### Factors Affecting Document Distribution

- If a document is not identified as a primary document in an image statement type, and/or does not have a match style associated, selecting the **Render Statement** document function will have no effect.
- If a document does not contain any keywords identified by a Document Distribution process, selecting the **Render Statement** document function will not initiate a Document Distribution.

- If the proper database licensing, workstation registration, and/or workstation flags are not configured, the distribution process will remain in a **Waiting** state in the **Document Distribution Queue** window.
- If class of service delivery is specified, but a document type is matched that is not configured for the class of service, the default delivery method will be employed.

### Reporting

If desired, the associated Statement Generation Report can be checked to obtain details on the statements that were rendered and distributed.

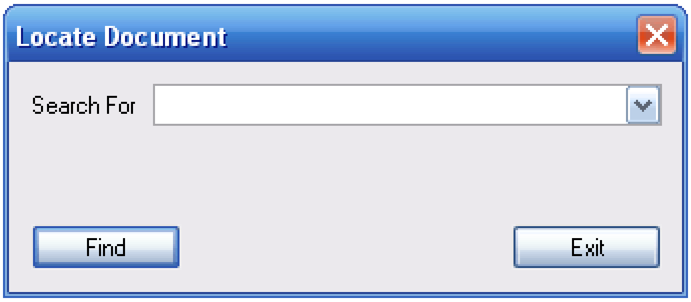
These reports will be saved into the system once the rendering of the statements is complete. In the case of a statement or statements being printed from a select list, the report can be found the **SYS User Printing Reports** document type. If an entire batch was rendered, the report will be found in the **SYS Batch Printing Reports** document type.

The report includes information regarding any errors encountered, warnings/messages, crippled statements, security keyword restrictions, and details regarding the distribution process. Distribution details include totals of work accomplished according to the delivery method (i.e., how many emails, notifications and CDs the batch produced).

## Locating Jobs

You can search the **Document Distribution Queue** to find a specific job. To find a job in the distribution queue:

1. Right-click in the **Document Distribution Queue** window and select **Locate Job**. The **Locate Document** dialog box dialog box is displayed.



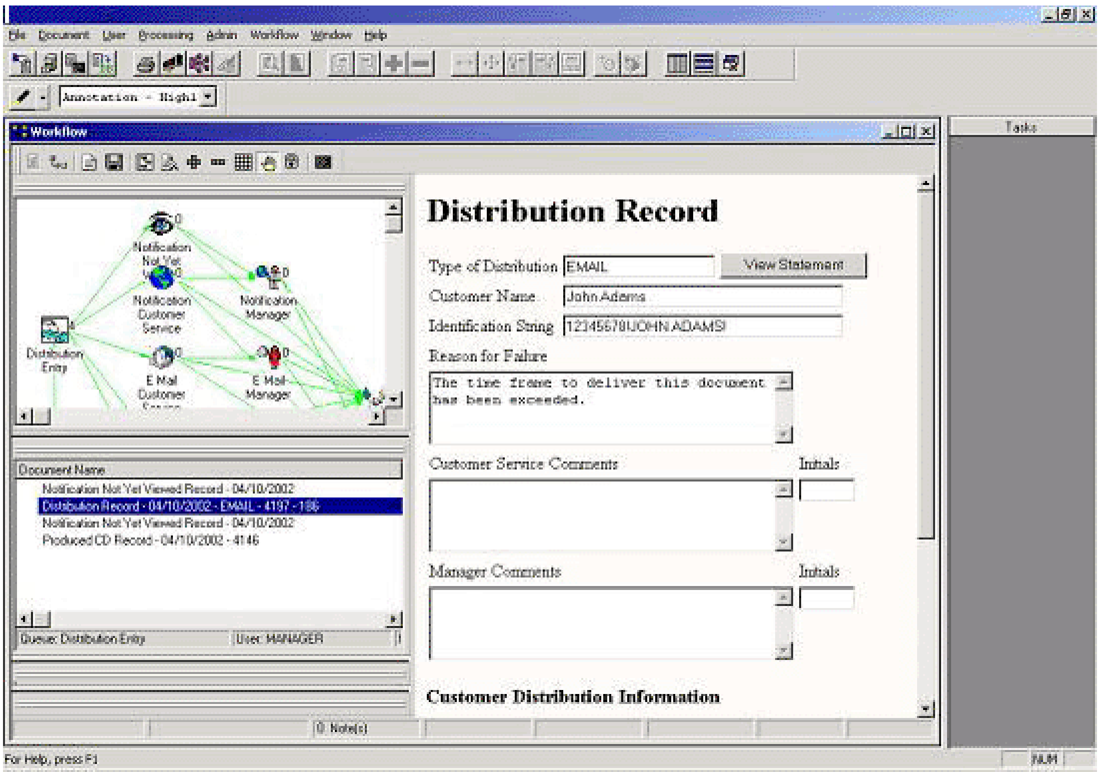

2. Enter the value you want to find within columns in the **Document Distribution Queue** window in the **Search For** field. Alternately, you can access previous searches by selecting them from the drop-down list in the **Search For** field.
3. Click **Find**. If more than one job meets the search criteria, only the first job found in the list is selected. You must repeat the search until you find the job you are looking for in this case.

## Workflow

Jobs that have failed will be submitted to the Document Distribution Workflow for issue handling and management with an associated Document Distribution Electronic Form with details of the failure.

In the example below, a Distribution Record was produced with the following reason: **The time frame to deliver this document has been exceeded**. In this particular case, an inaccurate email address was being used. The Email Customer Service Representative can contact the customer to verify the correct email address. Once confirmed, the Email Customer Service Representative can correct the address in the **Customer Information** dialog box. Upon updating the **Customer Information** dialog box, the Customer Service Representative can choose the Ad-Hoc Workflow task **Email Customer Again**.

The statement did not need to be re-rendered and was stored (and is also viewable) with the Distribution Record in the Workflow. Upon completion of the new email, the document will move to the **Distribution Resolved** queue indicating its success.




Similar customer service actions are also taken with other issue handling with faxes, notifications and published CDs.

## Undelivered Distributed Emails

When an email is not successfully distributed, it will be sent back to the sender. OnBase will look for the AUTOSTATEMENT= string in the subject, the body, or an attachment of a message. If this string is found, the message is placed back into the distribution queue.

**Note:** Emails with subjects containing the phrase "delivery delayed" (not case-sensitive) will not be returned to the sender or redistributed, even if the AUTOSTATEMENT= string is detected. Since these messages do no indicate a failed delivery, they will remain in the inbox.

If the sender's email address matches that of a recipient in the system, it will check to see if that recipient has a notification job that is in-progress or in-progress with error. If there is such a job, it will process the email as if it were a failed distribution for that job. If there is more than one job, it will use the one with the highest jobnum.

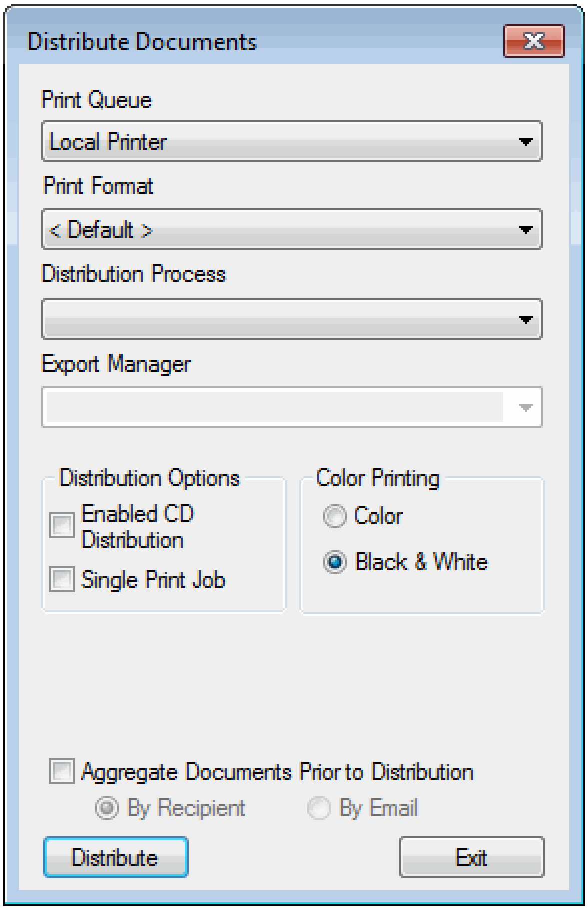
**Note:** Distribution Records are created for bounced email notifications that are not set to **Enable Resend**.

# Distributing Documents Not Associated with Image Statements

If you are licensed for Electronic Invoice Distribution, you can distribute documents that are not associated with Image Statements. This is accomplished from a search results list, from an open document or at the batch level. To distribute documents not related to Image Statements:

1. Select the document(s) you want to distribute from a search results list or open a document you want to distribute, right-click, and select **Distribute Document...** or select the batch you want to distribute, right-click, and select **Batch Distribute Documents**.

   The **Distribute Documents** dialog box is displayed.



2. Select the **Print Queue** you would like to use for the distribution.
3. Select a **Print Format** to determine print settings.
4. Select the **Distribution Process** you would like to use for the distribution.
5. If you are licensed for Automated CD/DVD Authoring and you want to enable CD or DVD distribution, select the **Enabled CD Distribution** check box. Select a configured **Export Manager** from the drop-downs select list. For more information about exporting, see the **Automated CD/DVD Authoring** documentation.
6. If you want all of the documents that are being distributed to be a part of the same Windows print job, select the **Single Print Job** check box.
7. Select either **Color** or **Black & White** to determine color printing settings.
8. If you would like to combine multiple email or CD jobs being sent to the same recipient into one job, select **Aggregate Documents Prior to Distribution**. If you are aggregating email jobs, select **By Recipient** to aggregate statements by recipient or select **By Email** to aggregate statements by email. The **By Recipient** and **By Email** options do not affect CD job aggregation.
9. If distributing more than one batch, an **Apply Settings to All Selected Batches** option is available. Selecting this option applies the settings in the **Distribute Documents** dialog to all selected batches.
10. Click **Distribute**.

# Usage - Web Client

## Reviewing Distribution Recipients

Distribution recipients specified in the Client can be viewed and edited in the Web Client. You can access distribution recipient information by clicking **Distribution Recipients** in the **Administration** layout. The list of Distribution Recipients is displayed in the viewer. This list is configurable; it usually contains a primary identifier, such as the recipient name, and one or more destination identifiers, such as the recipient email address or fax number. It may also contain other contact information, such as a phone number or a mailing address.

**Tip:** To sort the Distribution Recipients list by the values in a particular column, click the column's header. To alternate between ascending and descending order, click the column's header again.

**Distribution Recipients**

| Name | Institution | Email | Fax | Address1 | Address2 |
|---|---|---|---|---|---|
| Benjamin Harrison | 0 | bjharrison@preznet.com | 1-888-555-2727 | 1880 Tippecanoe | North Bend, OH 12345 |
| John Adams | 0 | jadams@preznet.com | 1-888-555-2727 | 2 Quincy Drive | Braintree, MA 09080 |
| Rutherford B. Hayes | 0 | rbhayes@preznet.com | 1-888-555-2727 | 1877 Temperance | Delaware OH 13579 |
| Ulysses S. Grant | 0 | USGrant@preznet.com | 1-888-555-2727 | 1869 Appomattox | Point Pleasant OH 12345 |

### To Edit Distribution Recipient Information

1. From the Web Client **Main Menu**, select **Open Administration**.


2. From the **Select Administration Action** pane, click **Distribution Recipients**. The list of recipients is displayed in the viewer.
3. Click the primary identifier, which links to an editable form that contains the same information as the recipient list. Like the recipient list, the form is configurable, so it may include fields for additional information.
4. Edit the fields as needed.
5. Click **Save** or **Submit** (or another customized button your organization uses to transmit changes to the recipient information).

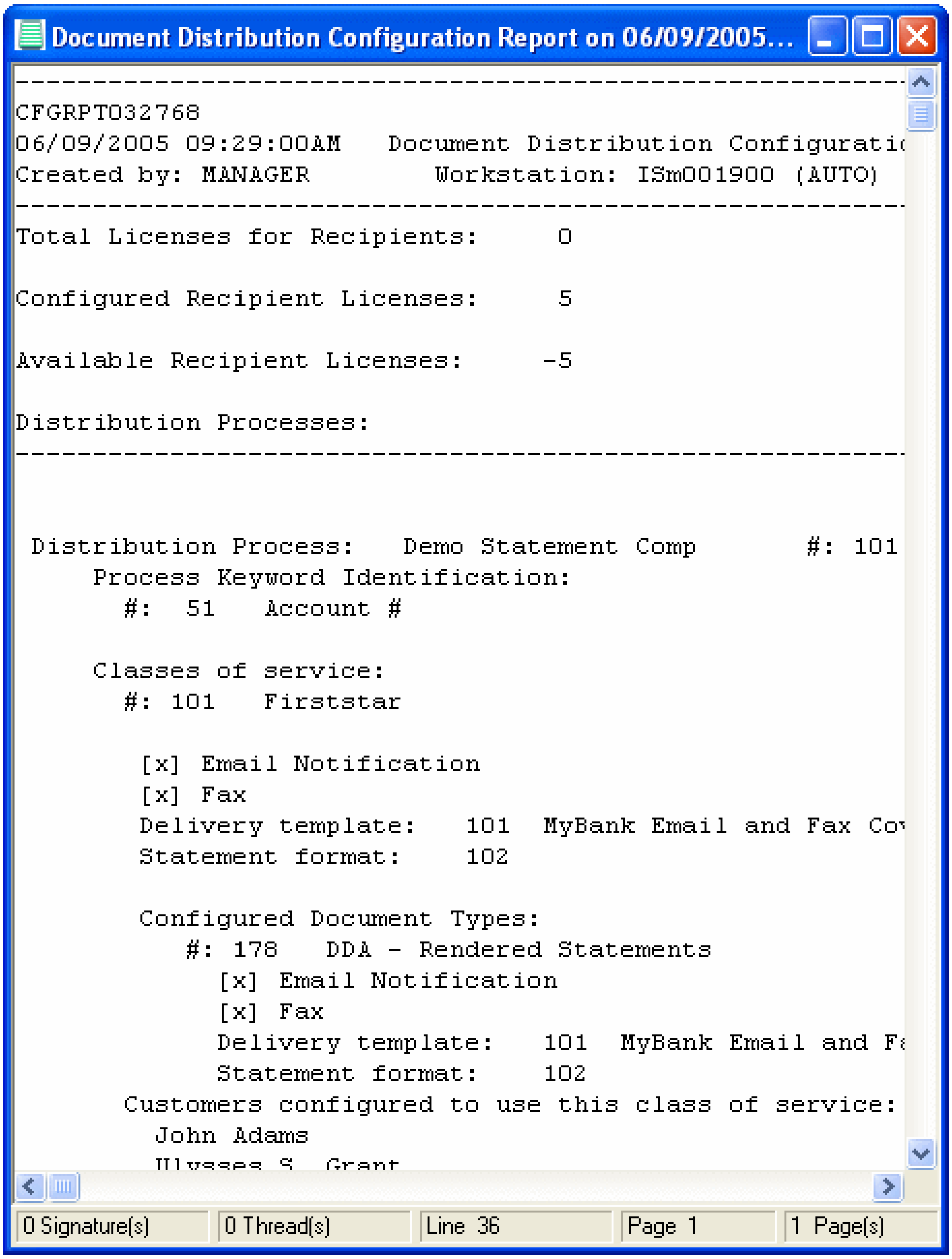
# Administration

## Configuration Reporting Tool

OnBase Configuration allows administrators to produce a configuration report for Document Distribution. The reports are produced in the Configuration module. Select **Reports | Document Distribution** at the menu bar.

The reports are available for viewing in the OnBase Client. Through the **Document Retrieval** window, select **System Reports** (Document Type Group) and **SYS Configuration Reports** (Document Type). Choose **Find** and locate your report.

See sample Configuration Report below:



Document Distribution Configuration Report on 06/09/2005...

```
-----------------------------------------------------------
CFGRPT032768
06/09/2005 09:29:00AM   Document Distribution Configuratio
Created by: MANAGER        Workstation: ISm001900 (AUTO)
-----------------------------------------------------------
Total Licenses for Recipients:     0

Configured Recipient Licenses:     5

Available Recipient Licenses:     -5

Distribution Processes:
-----------------------------------------------------------


 Distribution Process:   Demo Statement Comp       #: 101
     Process Keyword Identification:
       #:  51   Account #

     Classes of service:
       #: 101   Firststar

        [x] Email Notification
        [x] Fax
        Delivery template:   101  MyBank Email and Fax Cov
        Statement format:    102

        Configured Document Types:
           #: 178   DDA - Rendered Statements
             [x] Email Notification
             [x] Fax
             Delivery template:   101  MyBank Email and Fa
             Statement format:    102
       Customers configured to use this class of service:
         John Adams
         Ulysses S. Grant
```

0 Signature(s) | 0 Thread(s) | Line 36 | Page 1 | 1 Page(s)

# Maintenance

There are no module-specific maintenance procedures for Document Distribution.

# System Interaction

In most cases, the system needs to be licensed for certain input processing modules to bring the data for the primary and secondary document types into OnBase.

## AFP

AFP documents can be used as the basis for a Document Distribution process. See the **AFP Input Filter** module reference guide for configuration information.

## COLD

COLD-processed documents can be used as the basis for a Document Distribution process. See the **COLD/ERM** module reference guide for configuration information.

## DIP

Documents processed via DIP can be included as secondary documents in a Document Distribution process. Refer to the **Document Import Processor** module reference guide for configuration details.

## Document Imaging

Documents archived through scanning or sweeping can be included as secondary documents in a Document Distribution process.

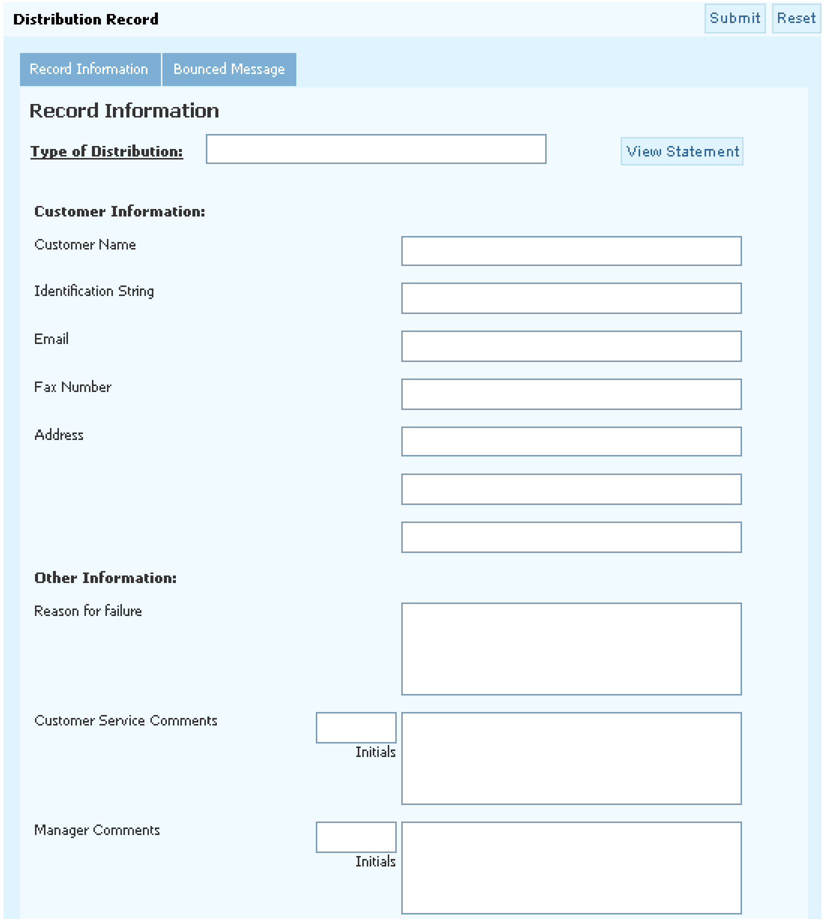
## E-Forms

E-forms used in conjunction with the Workflow module are used to manage email distributions (Notification and Distribution) or Fax distributions not successfully delivered within the retry/resend intervals and durations specified within the Distribution Server configuration. Failed deliveries enter the Document Distribution Workflow and are found in the appropriate Workflow Server queues, i.e. **Email Customer Service, Fax Customer Service**, etc.

E-forms are used to facilitate the handling of published CDs and DVDs. This process ensures that a published CD/DVD is taken from the Rimage equipment and mailed to the recipient. All recipients configured with the distribution option of published CDs have the **Produced CD Report** electronic form submitted to the **CD Customer Service** queue in the Document Distribution life cycle. This electronic form is used by the Customer Service agent and manager throughout the process of sending the CD to the recipient.

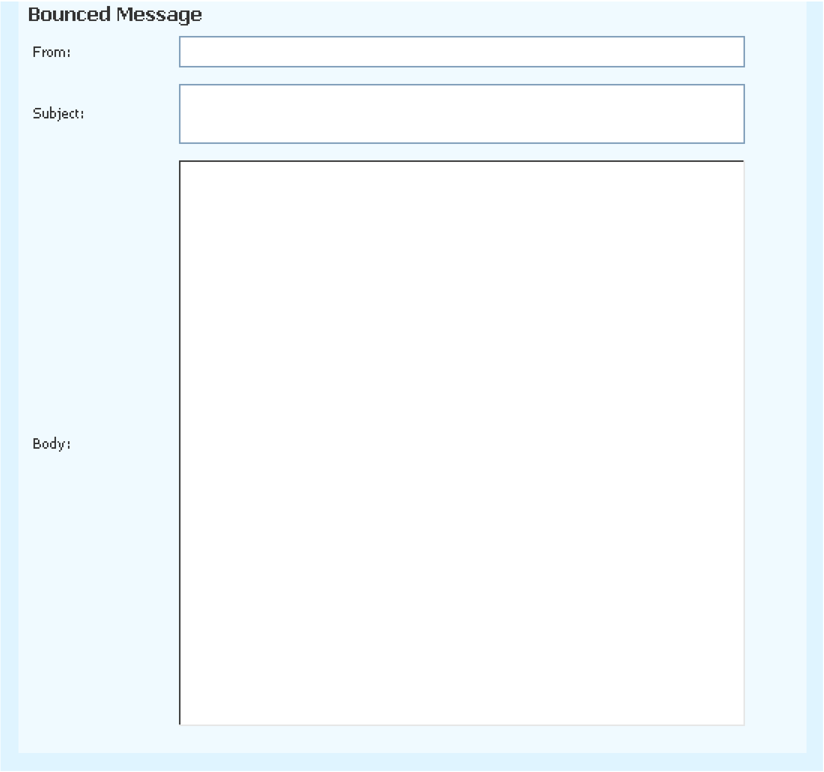
As issues are resolved, the e-forms display the delivery information used for the recipients. The new or modified recipient information is updated in the **Customer Information** dialog box. The rendered Image Statement can also be viewed from the electronic form. Upon resolving the delivery issue, the **Ad-hoc** task bar option (**Resolved this Item**) allows the agent and/or manager to re-distribute the statement from within Workflow (the statement does not need to be re-rendered).

Failed jobs are submitted to the Document Distribution Workflow for issue handling and management with an associated **Distribution Record** E-Form.

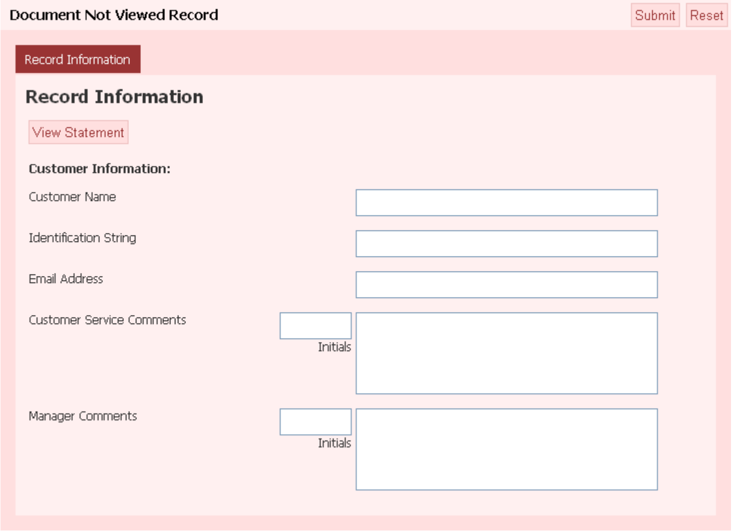


This form contains details of the failure, as well as the contents of the bounced email associated with the failure.

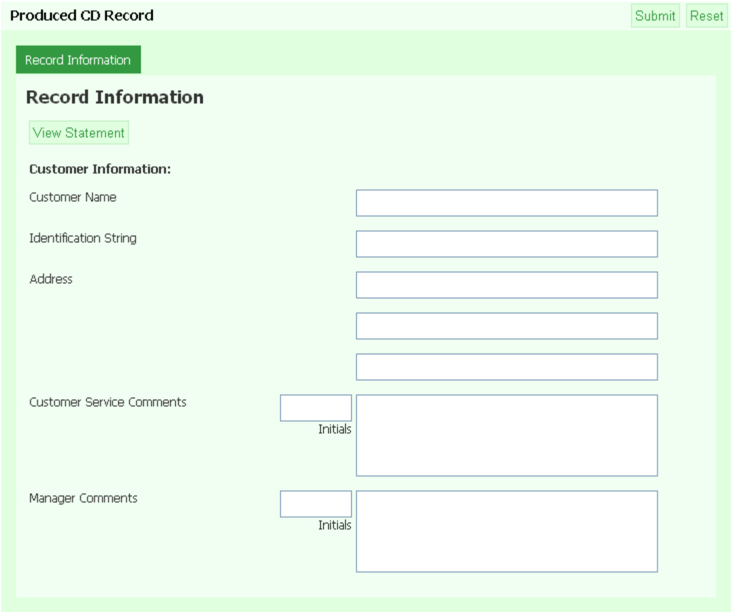
**Note:** A **Distribution Record** E-Form is created whenever an email bounces back in association with a failed job.




The **Document Not Yet Viewed Record** e-form is sent as a reminder to a recipient to view or download a statement delivered. Used for email notification delivery customers.



A **Produced CD Record** e-form is used for managing the process of delivering a published CD or DVD to a recipient.




# Exporting and Importing

Document Distribution configuration items can be exported and imported using OnBase Configuration.

In OnBase Configuration, in addition to the configuration items listed in the **System Administration** module reference guide, Document Distribution Processes can be exported and imported.

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

For more information, see the **System Administration** module reference guide.

# Image Statements

Any image statements that have been archived in OnBase are eligible for delivery via the Document Distribution module. See the **Image Statements** module reference guide for configuration information.

# PCL

PCL documents can be used as the basis for a Document Distribution process. Refer to the **PCL Input Filter** module reference guide for details.

## Statement Composition

The Statement Composition module captures host application print spools and stores the statement in the OnBase repository where the a statement design is overlaid on the data. The electronic file is available for retrieval by customer service representatives who can re-print, fax or email or publish a CD/DVD using Document Distribution.

## Workflow

OnBase Workflow is used as a back-end management tool for Document Distribution. It allows for the management of all exceptions and issue handling involved with Document Distribution. If a statement's delivery fails, the **Distribution** queue (See Usage - Client Module on page 228.) indicates the statement in failure status. Upon resending the statement (without re-rendering) from the **Workflow** queue, the Distribution Record is cleared. However, if the statement is re-rendered, the manager needs to manually delete the record in the **Distribution** queue.