OnBase®
Foundation EP5

Connector for use with SAP ArchiveLink

Reference Guide

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CONNECTOR FOR USE WITH SAP ARCHIVELINK INSTALLER

UNITY CLIENT FOR USE WITH SAP ARCHIVELINK INSTALLER

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FIORI EXTENSION FOR SAP ARCHIVELINK USAGE

The OnBase ArchiveLink Server exists to provide a connection between an existing SAP system and an OnBase content management system. Through a set of OnBase components, it allows OnBase users to interact with their SAP system, providing a tight integration between the OnBase solution and SAP. This integration allows enterprises using SAP the ability to use OnBase as a Content Management System in conjunction with their SAP system.

The OnBase Connector for use with SAP ArchiveLink solution has three major points of integration:

- HTTP ArchiveLink Content Server
- OLE/HTTP front end functionality via the Unity Client for use with SAP ArchiveLink, DocPop, or UnityPop (OLE viewer)
- Bar Code BAPI (BAPI RFC)

Each piece of the solution requires the deployment of either the OnBase Client, Unity Client for use with SAP ArchiveLink, or the Core Services platform. Scanning stations operators can utilize the OnBase Client to perform indexing and bar code processing. These scan queues are then linked to SAP via the BAPI scan queue configuration in the configuration module, allowing users to link OnBase documents to SAP business objects from the OnBase scanning station.

Users can also view documents directly from SAP by using the Unity Client for use with SAP ArchiveLink, DocPop, or UnityPop as an OLE viewer. The Unity Client for use with SAP ArchiveLink can also be used to link OnBase documents to SAP, as well as bring new documents into both SAP and OnBase using its various archive functions.

The OnBase ArchiveLink Content Server is an N-tier web application that provides HTTP based linking between OnBase documents and SAP. This server acts as the primary connection between OnBase and SAP, providing linking services. The OnBase ArchiveLink Content Server requires an underlying Microsoft Internet Information Server 7.0 running on Microsoft Windows 2008. All communications with the exception of BAPI RFC are performed using standard Internet network protocols that are compatible with HTTPS bindings and VPN secure connections. Communications between the OnBase ArchiveLink Server and SAP for bar-coding purposes utilize RFC and should have their servers placed appropriately as a result. Any firewall or other network-limiting factor could have an impact upon these communications.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Connector for use with SAP ArchiveLink functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

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

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

Simplified Licensing

In addition to a base package license for standard OnBase functionality, the Connector for use with SAP ArchiveLink add-on license is required to access standard OnBase Connector for use with SAP ArchiveLink functionality.

Optional Licensing

One or more add-on package licenses are required to access the following functionalities:

Add-On License	Functionality
OLE Viewer for use with SAP ArchiveLink	Unity Client for use with SAP ArchiveLink
Bar Code Import for use with SAP ArchiveLink	Bar code integration and using an OnBase scanning application to register scanned documents with SAP software
Print List and Data Archive for SAP ArchiveLink	Print List and Data Archive
FIORI Extension for SAP ArchiveLink	FIORI Extension

For more information on the packages available to you, contact your account manager.

Legacy Licensing

OnBase Connector for use with SAP ArchiveLink requires the **Connector for use with SAP ArchiveLink** license. Depending on the functionality you want to use, the following licenses are also required:

- The **OLE Viewer for use with SAP ArchiveLink** license is required to use the Unity Client for use with SAP ArchiveLink.
- The **Bar Code Import for use with SAP ArchiveLink** license is required to use the Bar Code Integration and allows an OnBase scanning application to register scanned documents with SAP software.
- The **Print List and Data Archive for SAP ArchiveLink** license is required to use Print List and Data Archive functionality.
- The **FIORI Extension for SAP ArchiveLink** license is required to use the FIORI Extension functionality.

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

OnBase®
Foundation EP5

Connector for use with SAP ArchiveLink

Installation Guide

Foundation EP5

Requirements

The following sections outline requirement information specific to Connector for use with SAP ArchiveLink in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Connector for use with SAP ArchiveLink and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Databases Supported
- Supported Desktop Operating Systems
- Microsoft .NET Framework Requirements
- Microsoft Visual C++ Requirements
- Database/File Servers
- Server and Core Services Hardware Requirements
- Third-Party Software Compatibility

ArchiveLink Server Requirements

The ArchiveLink Server must meet the following requirements

Component	Minimum Requirements
HTTP Web Server	Microsoft IIS 6.0 / 7.0.
Operating System	The ArchiveLink Server is supported on any operating system supported for the OnBase Foundation EP5 Web Server. See the **Server Supported Operating Systems** section for more information on supported operating systems.
CPU	Dual Intel Xeon processor at 2.8 GHz or faster. Maximum CPU speed.
System Memory	2 GB minimum, 4 GB recommended
Database Versions	The ArchiveLink Server is supported on any database version supported for OnBase Foundation EP5. See the **Databases Supported** section for more information on supported databases.
Dependencies	• Microsoft Visual C++ 2012 Redistributable Pack x64 • Microsoft Visual C++ 2015 Redistributable Pack x86 • Microsoft Visual C++ 2015 Redistributable Pack x64 • Microsoft Visual C++ 2019 Redistributable Pack x64

Note: This module is not supported for use with an Informix or DB2 database.

Third-Party Software Requirements

Connector for use with SAP ArchiveLink supports SAP 4.6c and above.

A browser supported by DocPop is required for viewing documents through DocPop with SAP. For more information, see the DocPop documentation.

Licensing

See for licensing requirements.

Upgrade Considerations

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

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

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

Deprecation of OnBase Desktop — As of OnBase 17, OnBase Desktop has been replaced with the Unity Client for use with SAP ArchiveLink. If you had previously used OnBase Desktop, after installing the Unity Client for use with SAP ArchiveLink you must configure the new client as an OLE application in SAP as described in **Define an OLE Application** in the Configuration chapter of the MRG.

Upgrading from 32-bit to 64-bit — Before installing the new 64-bit version of Connector for use with SAP Archive Link, you must remove any existing 32-bit **.dll** files. In addition, you must unregister the 32-bit **Hyland.ArchiveLink.SSF.dll** file and register the 64-bit **Hyland.ArchiveLink.SSF.dll** file.

Back Up Your Database — Before upgrading your SAP solution, back up your database.

Update Web.config File — Run the install wizard to automatically update the web.config file with most of the required information for your updated solution. If using Workflow, you must also manually update the file to set the **AddToWorkflow** setting to **true**.

Keep Versions Consistent — If using the Business Indexing Connector for use with SAP ArchiveLink or the Unity Client for use with SAP ArchiveLink in conjunction with the Connector for use with SAP ArchiveLink, ensure that all products are updated to the same version of the software.

Do Not Move the BIC .config File — If using the Business Indexing Connector for use with SAP ArchiveLink, leave the BIC .config file in the **ArchiveLink** folder. This ensures that any existing BIC configurations remain available.

Pre-Installation

OnBase Client

Install the OnBase Client on the ArchiveLink Server station as well as any scanning stations performing archival linking. A functional OnBase Client helps administrators more effectively trouble shoot and administrate the ArchiveLink Server by allowing them to verify database connectivity and system functionality that is not related to ArchiveLink Server installation.

Unity Client for use with SAP ArchiveLink

For ease of installation, it is recommended to use the Hyland Unity Client for use with SAP ArchiveLink installer to install the Unity Client for use with SAP ArchiveLink on SAP Client machines. Once installed, users should verify that the successful retrieval and archival of documents in the OnBase/ArchiveLink database.

For more information, see Unity Client for use with SAP ArchiveLink Installer on page 42.

OnBase Unity Client

The OnBase Unity Client must be installed on any workstation that will be used to retrieve documents through a content server configured to use UnityPop. See the Unity Client documentation for more information on installing and configuring the Unity Client.

OnBase Core API

In order to use Core Services as part of your Connector for use with SAP ArchiveLink solution, Core Services must be installed on the ArchiveLink Server. The Core API should be tested to verify proper installation. Execute a VB script that connects to the OnBase/SAP database and exercises the Core functionality. Verify that Core, Presentation and Image Services modules are all operating correctly. Use the Core API SDK for sample scripts to accomplish this. In addition, ensure that the **OBIMGLIB.dll** file is within your Core API directory.

OnBase Application Server

An Application Server must be installed on the same server that the Connector for use with SAP ArchiveLink module is installed.

Tip: It is recommended that you install a 64-bit Application Server so that only one version of the SAP Connector for Microsoft .NET Version 3.0 is needed. See Install the SAP Connector for Microsoft .NET Version 3.0 on page 9 for more details.

Installation

SAP Certificate Directory

Create a **sapCertificate** directory on the root of the C:\ drive to store the SAP certificates so the new OnBase content repository can be activated in SAP. This will now match the location within the **certificatepath** property of the **sapconfig** table.

Installing Connector for use with SAP ArchiveLink

There is an installer used to install the Connector for use with SAP ArchiveLink. For more information see Connector for use with SAP ArchiveLink Installer on page 30.

Installation Considerations for Microsoft Windows Server

As a best practice, administrators must take into account the identity of the user running the IIS worker thread. The machine account places restrictions on the asp.net worker process that make it incompatible with certain web server applications that must access non-local disk groups. For this reason, the asp.net worker process must run as a secondary identity to ensure access to these disk groups. Windows Server applications pools offer an excellent solution for running asp.net applications as secondary identities.

To create an application pool:

1. Open Internet Information Services (IIS) Manager.
2. Expand the tree so that the **Application Pools** node is displayed.
3. Right-click **Application Pools** and select **Add Application Pool.**
4. Enter **ArchiveLink** in the **Name** field in the **Add Application Pool** dialog box.
5. Click **OK**.

To configure the content server virtual directory:

1. Right-click the application pools icon and select **Advanced Settings**.
2. In **Recycling**, remove any undesired asp.net worker process recycling.
3. In **Process Model**, select **Identity** and click **…**.
4. The **Application Identity Pool** dialog box is displayed, select **Custom account**.
5. Click **Set**.
6. Enter an appropriate username and password for the application identity. This user should have administrative rights to the local machine and be a member of the Local Admin group. This user should also have read rights to access the OnBase database and the OnBase disk groups for all documents to be used with the Connector for use with SAP ArchiveLink.

Note: If the **defaultAppPool** setting in the applicationHost.config file has been set to true, this user must also be a member of the IIS_USRS group.

7. Click **OK** when finished.

The new application pool can now be applied to the content server virtual directory created with the previous steps. To apply the application pool to the content server virtual directory:

1. Right-click on the virtual directory you have created.
2. Select **Basic Settings**.
3. Click **Select**.
4. Select the new application pool from the **Application pool** drop-down list.
5. Click **OK**.

Install the SAP Connector for Microsoft .NET Version 3.0

The SAP Connector for Microsoft .NET Version 3.0 is required. For information on installing the SAP Connector for Microsoft .NET Version 3.0, **https://www.service.sap.com/connectors**. Contact your Basis Administrator for help acquiring these files.

- **64-bit Application Server**: 64-bit SAP Connector for Microsoft .NET
- **ArchiveLink**: 64-bit SAP Connector for Microsoft .NET
- **Business Indexing Connector**: 64-bit SAP Connector for Microsoft .NET

Tip: Use of a 64-bit Application Server is recommended so that only one version of the SAP Connector for Microsoft .NET Version 3.0 needs to be installed.

When you install the SAP Connector for Microsoft .NET Version 3.0, it is recommended that you also install it to the GAC.

Install the librfc32.dll and sapsecu.dll Files

The **librfc32.dll** and **sapsecu.dll** files must be installed on the machine where Connector for use with SAP ArchiveLink will be installed.

To install these files, copy the librfc32.dll from your SAP GUI installation and sapsecu.dll from your SAP Server installation. Paste both files in the **ArchiveLink\bin** directory (for example, **C:\inetpub\wwwroot\ArchiveLink\bin**).

Specifying the Datasource

In the web.config file in the ArchiveLink directory, you must specify the name of the ADO.NET connection string used as a datasource. In the **<appSettings>** section, the **dataSourceName** must have the appropriate datasource name specified.

```
<add key="dataSourceName" value="datasource"/>
```

Specifying the File Size Limits

When archiving data or print lists on documents greater than 200 KB, you can specify the maximum file size for archiving. To specify the limit, set the **maxrequestlength** setting in the web.config file equal to the number of kilobytes. Example:

```
<httpRuntime maxRequestLength="16384" executionTimeout="90"/>
```

Converting Space Encoding

In some cases, you may need to change the space encoding. In order to convert + space encoding to %20 space encoding, the following ArchiveLink web.config setting must be set to true:

```
<add key="UseModifiedSpaceEncoding" value="true"/>
```

Adding Documents to Workflow

When documents that enter the repository are assigned to a Document Type that is associated with a life cycle and the `AddToWorkflow` setting is set to `true` in the ArchiveLink directory's web.config file, documents will enter Workflow.

Configuring Compatibility with Legacy SAP Systems

If you are using SAP version R3 4.6C, a setting needs to be changed in order for work objects to be created with the appropriate parameters. In the ArchiveLink web.config file under `<appSettings>`, the value of the key `isLegacySAPSystem` must be changed to `true`.

Certifying as Solution Manager Ready

The Connector for use with SAP ArchiveLink module can be registered with a Solution Manager application, thereby certifying it as Solution Manager Ready. Before you can enable this functionality, ensure that you have configured a Solution Manager destination. For more information, see HTTP Destinations on page 66. Additionally, ensure that you have obtained **solman.xml** from your OnBase solution provider.

1. Insert the **Sender ID** from the Solution Manager destination as the value for the **SolutionManagerSenderID** setting in the web.config file. Example:
   ```
   <add key="SolutionManagerSenderID" value="sapsolman"/>
   ```
2. Copy **solman.xml** into the ArchiveLink root directory.
3. Open ArchiveLink.
4. Go to Technical Systems.
5. From the **Technical System Type** drop-down list, select **Third-Party**.
6. From the subsequent drop-down list, select **Hyland**.

Sending Passwords as Uppercase

Some versions of SAP use case sensitive passwords. To ensure that passwords are communicated from OnBase to SAP in uppercase you must set **ForceUppercasePassword** to **true** in the ArchiveLink directory's **web.config** file.

Create a Custom File Format

In the Configuration module, a custom file format must be created for use with the SAP Integration. To create a file format for the SAP Integration:

1. Select **Document | File Formats**.
2. Enter SAP for the file format name.

3. Click **Create**. The **File Format Settings** dialog box is displayed.

4. Select **Custom** in the **Viewer Type** section.
5. In the **MIME type** field, enter **application/octet-stream**.
6. Leave all other field values blank.
7. Click **Save**.
8. Note the file format number of the newly created file format, displayed in the upper right-hand corner of the **File Format Configuration** dialog box.

Configuring the Image File Format for Use With SAP ArchiveLink

A MIME type must be specified for the Image File Format for SAP ArchiveLink to avoid the default file format for the content server to be incorrectly used for image files. To specify a MIME type for the Image File Format:

1. Select **Document | File Formats**.
2. Select **Image File Format** in the **File Format Description** box.
3. Click **Settings**.
4. In the **MIME type** field, enter **image/tiff**.

5. Click **Save**.

Configuring the User Account for Connector for use with SAP ArchiveLink

You must configure a user account that is configured as a **Service Account**.

To configure a Service Account:

1. From the Configuration module, select **Users | User Names / Passwords**.
   The **User Names & Passwords** dialog box is displayed.

2. Enter a new user name in the field beneath the **User Name** list and click **Create**. The **User Settings** dialog box is displayed.

   You can also select an existing user account to designate as a service account, then click **Settings**. The **User Settings** dialog box is displayed.

3. Select the **Service Account** check box under **Administrator Options**.

All options not applicable to a Service Account are disabled. Deselecting the **Service Account** check box for the existing user allows them to retain all rights and privileges that were previously assigned to them. Options in the **User Settings** dialog box are cleared when the **Service Account** check box is selected and must be reapplied when the check box is deselected.

Caution: The **Service Account** check box should never be selected with an account that is being used to run the OnBase Client (obclnt32.exe) as a Windows service.

Caution: Designating an existing user account as a **Service Account** removes the existing user from all User Groups and prevents the user from being added into a User Group. Users that are configured as service accounts will not be able to log into OnBase through standard interfaces. A Service Account also grants the user name full rights and privileges in OnBase.

4. Enter a **User Password** and repeat this password in the **Verify Password** field. If this is an existing user account and you need to change its password, select **Update Password** to enable these fields.

Note: The **Require Password Change on Next Login** setting cannot be selected for Service Accounts.

---

5. Click **Save**.

Additional Installation Steps to Use DocPop for Retrieval

In order to use DocPop for retrieval, there are few extra installation steps that are required.

Changes to ArchiveLink web.config File

To allow viewing of documents through DocPop with SAP, three changes need to be made to the ArchiveLink web.config file. The **UseDocPopAsGetViewer** setting needs to be set to **true** and the **SAPDocPopURL** setting needs to be added. The DocPop URL should point to the docpop.aspx file as shown below.

```
<add key="SAPDocPopURL" value="http://machinename/Appnet/docpop/docpop.aspx"/>
```

The **SAPDocPopClientType** setting is used to specify the Web Client that is used to view documents through DocPop. When set to **activex**, the ActiveX Web Client will be used. When set to **html**, the HTML Web Client will be used.

In addition, the **checksum** setting must be set to the exact value of the **checksum** setting in the Web Server's web.config file. For more information about checksum generation, please refer to the Hyland SDK.

DocPop Configuration

DocPop also needs to be configured. See the DocPop documentation for more information concerning configuration.

Note: Auto-login is the preferred method for DocPop. If auto-login is not configured, a user will have to login to OnBase every time a documents is accessed.

Additional Installation Steps to Use UnityPop for Retrieval

In order to use UnityPop for retrieval, there are few extra installation steps that are required.

Changes to ArchiveLink web.config File

To allow viewing of documents through UnityPop with SAP, changes need to be made to the ArchiveLink web.config file. The **UseUnityPopAsGetViewer** setting needs to be set to **true**.

Caution: If the **UseDocPopAsGetViewer** setting is set to **true**, the **UseUnityPopAsGetViewer** setting will not be respected even if it has been set to **true**.

UnityPop Configuration

UnityPop also needs to be configured. See the Unity Client documentation for more information on configuring UnityPop.

Note: Auto-login is the preferred method for UnityPop. If auto-login is not configured, a user will have to login to OnBase every time a documents is accessed.

Registry Requirement

The **SAPServerURL** registry string needs to be added to the following registry key:
- Under 64-bit operating systems, HKEY_LOCAL_MACHINE\Software\Wow6432Node\Hyland\DMDESKTOP.

Note: As an alternative under 64-bit operating systems, if the registry editor is launched from C:\Windows\SysWOW64, the standard registry keys can be updated.

Caution: Modify the registry at your own risk. Incorrectly editing the Windows registry can cause serious problems that may require you to reinstall your operating system. Be sure to back up the registry before making any changes to it. For more registry information, see the following Microsoft articles: http://support.microsoft.com/kb/256986 and http://technet.microsoft.com/en-us/library/cc725612.aspx

The value of the string should be the location of the Service.aspx page within the ArchiveLink server. Example: http://machinename/ArchiveLink/Service.aspx.
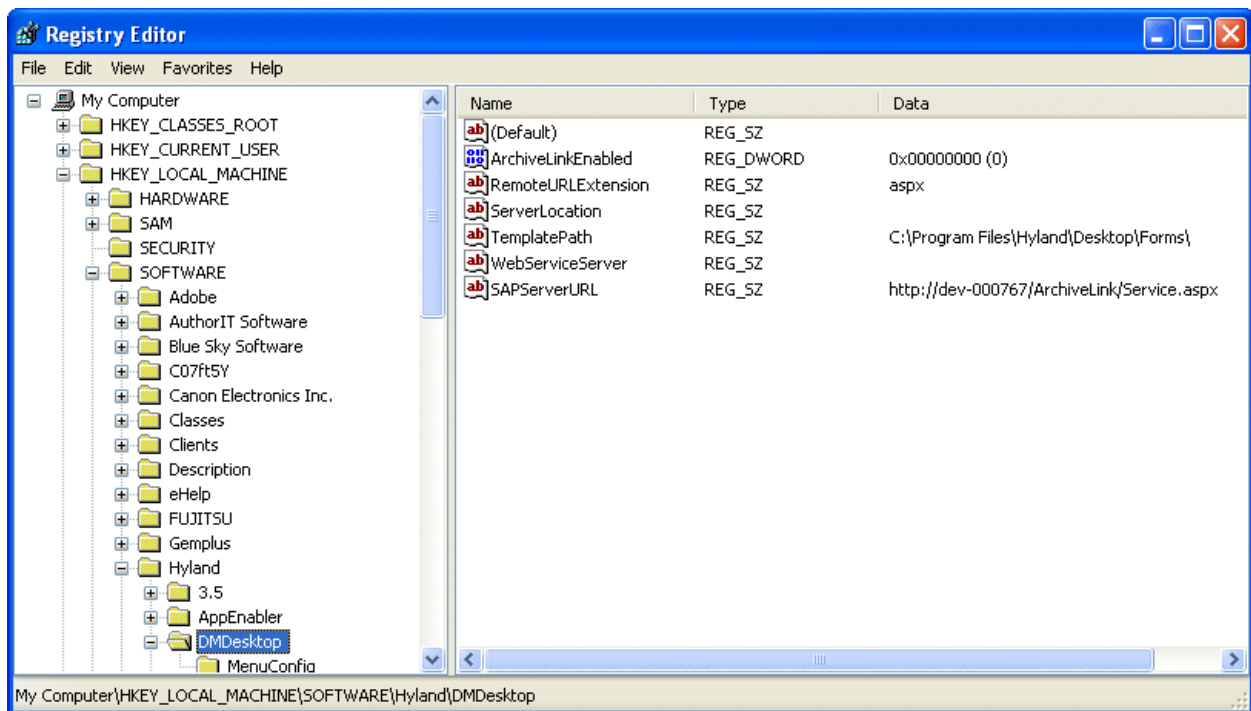
Minimum SAP Authorization Objects

Authorization object s_wfar_obj

- Activity (01 Generate, 03 Display, 06 Delete, 70 Administer)
- Content
  repository
- Document type
- Business Object type

Authorization object 's_wfar_pri' (new from Release 4.5A)

- Authorization object for print lists
- For fields see s_wfar_obj
- Additional authorization for ABAP program names

Authorization object s_bds_ds (for call BDN)

- Activity (03 display recommended)
- Class type (BO for Business Object from BOR)
- Class name (BOR object type)

Hyland.Logging

A **Hyland.Logging** section is available in the .config files of .NET-based applications, such as the OnBase Application Server or Web Server. This section controls diagnostics logging for those applications.

Enabling Event Viewer Logging

Events can be logged to the Hyland log in the Windows Event Viewer on the current server. The following steps describe how to ensure that Event Viewer logging is enabled.

1. Ensure the **WindowsEventLogging** element exists in the application's .config file.
2. If necessary, modify the **sourcename** attribute. When events are logged to the Hyland log, they display this value as their source. Ensure the value differs from the **sourcename** configured for any other OnBase application on this server.

   The default source name for the OnBase Application Server is **Hyland Application Server**. The default source name for the OnBase Web Server is **ASP.NET Web Client**.

Diagnostics Profiles

The Diagnostics Service writes messages to specific profiles, which correspond to specific products or categories. The data logged to each profile corresponds to the tab of the same name in the Diagnostics Console.

Available profiles vary per application. Depending on the application, one or more of the following profiles can be used:

Profile	Description
asp.net	ASP.NET messages.
cache	Cache messages, which are logged when the Application Server attempts to add or retrieve information from the item cache.
configuration	OnBase Studio messages.
db	Database messages.
error	Errors. To save errors to a log file, you must still follow the normal procedures for enabling log file creation.
file	Disk Group access messages.
fulltext	Full Text Indexing Service messages. This profile is available only for the Hyland Full Text Indexing Service.
hl7	HL7 version 3 service messages.

Profile	Description
ldap	Active Directory and LDAP messages.
locking	Locking messages, which are logged when the Application Server attempts to lock an item in the system.
report.services	Report Services messages.
scriptexception	Allows client-side script exceptions to be reported through the Web Server to the Diagnostics Console. This profile is available in the Web Server's web.config, and it should always be included.
service	Service messages. This profile is not available for the Web Server.
trace	Trace messages. See Setting the Tracing Level on page 21 for information about configuring trace logging.
vbscript	VBScript execution messages in Workflow. **Note:** This profile is not available for the Web Server.
warnings	Warning messages, which the Application Server logs for events that do not trigger an error but may indicate an invalid setting. For example, this profile may display information about incorrectly configured E-Form fields.
wcf	Transfer Batch Handler Service messages.
web.service	Web service messages. **Note:** This profile is not available for the Web Server.
workflow	Workflow script execution and trace messages.

Enabling Diagnostics Logging

In order for an application to send diagnostics messages to the Diagnostics Service and Diagnostics Console, a logging route must be configured in the **Hyland.Logging** section of the application's .config file.

By default, all logging profiles are logged to the configured route. You can configure the route to include or exclude specific profiles.

Use the **include-profiles** key in a route to enable logging only for specific profiles. List the included profile names in a comma-separated, case-sensitive list in the **value** attribute of the key. For example:

```
<add key="include-profiles" value="example1,example2" />
```

Note: Any profiles not listed in the **include-profiles** key will not be logged.

Use the **exclude-profiles** key in a route to disable logging for specific profiles. List the excluded profile names in a comma-separated, case-sensitive list in the **value** attribute of the key. For example:

```
<add key="exclude-profiles" value="example1,example2" />
```

Note: Any profiles not listed in the **exclude-profiles** key will be logged. Also, the **include-profile** key overrides the **exclude-profiles** key, so if a profile is listed in both keys, it will be logged.

Truncating Log Length

Long string values can be configured for automatic truncation in logs. To configure this option:

1. Find the **Hyland.Logging** section of the application's .config file.
2. Under this section, prior to the **Route** subsection, find the following line:
   ```
   <Hyland.Logging TruncateLogValues="NUMBER">
   ```
   If the line is not already present, add it before the <Routes> subsection.
3. Replace **NUMBER** with the number of characters to truncate strings after, in quotation marks. The default value for this is **1024**.
4. Save the file and restart the application.

Setting the Logging Level

To receive logging messages, a logging level must be specified for a logging route in the **Hyland.Logging** section of the application's .config file. To set the logging level:

1. Find the logging route you want to configure in the **Hyland.Logging** section.
2. Within the **Route** section for the route, ensure the following line is included:
   ```
   <add key="minimum-level" value="Trace" />
   ```
   This enables detailed messaging to the diagnostics route.

Note: Depending on the application, this line might be included by default but commented out. Remove the **<!--** and **-->** from the line to uncomment the line.

3. Change **value="Trace"** to **value="Debug"**.

Note: The value **Trace** logs the most detailed messages possible. These messages may contain sensitive information. Due to this, **Trace** should not be used in any production environment.

4. To refine the severity of messages being received by the diagnostics route, you can edit the **key** and **value** attributes in the following manners:

   • The **key** value can be set to **minimum-level**, which limits the lowest-severity log level that is received. You can add an additional line that includes **maximum-level**, which limits the highest-severity log level that is received.

   • The **value** can be set to any of the following log level severities, listed from most severe to least severe.

Note: Log level names in the **value** attribute are case sensitive.

Log Level	Description
Critical	Logs that describe an unrecoverable application, system crash, or catastrophic failure that requires immediate attention.
Error	Logs that highlight when the current flow of execution is stopped due to a failure. These logs indicate a failure in the current activity, but not an application-wide failure.
Warning	Logs that highlight an abnormal or unexpected event in the application flow but do not otherwise cause the application to stop.
Information	Logs that track the general flow of the application.
Debug	Logs that are used for interactive investigation during development.
Trace	Logs that contain the most detailed messages and may include sensitive data. These logs should never be enabled in a production environment.
None	A logging category that should not write any logging messages.

For example, the **Hyland.Logging** section of the .config file could be edited to:

```
<add key="minimum-level" value="Debug" />
<add key="maximum-level" value="Critical" />
```

This example specifies that the logging route only receives logging messages with a severity level of **Debug** or above, and it receives no messages with a higher severity level than **Critical**.

Note: The default severity level of a route is a minimum of Information and a maximum of Critical. The route uses these severity levels if it does not include a **minimum-level** or **maximum-level** line specified in the .config file.

5. Save the file and restart the application.

Setting the Tracing Level

Some applications let you control the amount of information logged to the **trace** profile using the **hylandTracing** switch, which is in the application's configuration file. Set the value to **0** for no information. Set the value to **1**, **2**, **3**, or **4** for minimal, normal, detailed, or verbose messages, respectively.

Creating Log Files

Routes can be configured to write logs to separate external .json files. These files can later be opened for viewing in the Diagnostics Console or in a text editor such as Notepad.

To configure logs to be written to files in the .config file of the application:

1. Open the .config file.
2. Locate the **Hyland.Logging** section of the file.
3. In Route sub-section for the diagnostics route you want to configure, enter the following tag:
   ```
   <add key="File" value="FILEPATH"/>
   ```
   For **FILEPATH**, enter the full file path for the log file, including the name of the file you want the log to be saved as. This file must be a .json file. For example, `<add key="File" value="C:\Users\jsmith\Desktop\log.json"` would write the logs to a log.json in that directory.
4. Save the file and restart the application.

Disabling IP Address Masking

In the Diagnostics Console, the IP address of the workstation is displayed in certain tabs. By default, the source IP address is obfuscated so that it cannot be identified. To display the full source IP address of the workstation, a tag must be entered into the diagnostics route in the **Hyland.Logging** section of the .config file of the .NET-based application being used by the workstation.

To enter the tag into the .config file of the application:

1. Open the .config file.
2. Locate the **Hyland.Logging** section of the file.
3. In Route sub-section for the diagnostics route you want to configure, enter the following tag:
   ```
   <add key="DisableIPAddressMasking" value="true"/>
   ```
4. Save the file and restart the application.

Configuring for Third Party Diagnostic Programs

Hyland.Logging can be configured to send information to several different third party diagnostic programs, such as Splunk or ELK. Routes must be specifically configured for each of these options. For more information on these configuration steps, see:

Configuring Hyland.Logging for Splunk

Hyland.Logging can be configured to send information to Splunk as well as the Diagnostics Console by modifying the .config file of the server. To configure Hyland.Logging to send information to Splunk:

1. Open the .config file.
2. Locate the **Hyland.Logging** section of the file.
3. In the **Routes** sub-section, add the following new route:
   ```
   <Route name="Logging_Local_Splunk" >
   <add key="Splunk" value="http://localhost:SplunkPort"/>
   <add key="SplunkToken" value="SplunkTokenNumber"/>
   <add key="DisableIPAddressMasking" value="false" />
   </Route>
   ```
4. Replace the **localhost** value with the address of the host if not local.
5. Replace the **SplunkPort** value with the port used by Splunk.
6. Replace the **SplunkTokenNumber** value with the Splunk token.
7. Add any additional keys for routing levels or profiles to this route as desired.
8. In the AuditRoutes sub-section, add the following new route:
   ```
   <Route name="Audit_Local_Splunk" >
   <add key="Splunk" value="http://localhost:SplunkPort"/>
   <add key="SplunkToken" value="SplunkTokenNumber"/>
   <add key="DisableIPAddressMasking" value="false" />
   </Route>
   ```
9. Replace the **localhost** value with the address of the host if not local.
10. Replace the **SplunkPort** value with the port used by Splunk.
11. Replace the **SplunkTokenNumber** value with the Splunk token.
12. Add any additional keys for routing levels or profiles to this route as desired.
13. Save the file and restart the application.

Configuring Hyland.Logging for ELK

Hyland.Logging can be configured to send information to ELK as well as the Diagnostics Console by modifying the .config file of the server. To configure Hyland.Logging to send information to ELK:

1. Open the .config file.
2. Locate the **Hyland.Logging** section of the file.
3. In the **Routes** sub-section, add the following new route:
   ```
   <Route name="Logging_LOCAL_ELK">
   <add key="Http" value="http://<LOGSTASH_HOST_MACHINE>:PORT"/>
   <add key="DisableIPAddressMasking" value="false" />
   <add key="CompactHttpFormat"/>
   </Route>
   ```
4. Replace the **<LOGSTASH_HOST_MACHINE>** value with the address of the Logstash Host Machine.

5. Replace the **PORT** value with the port used by Logstash.
6. Add any additional keys for routing levels or profiles to this route as desired.
7. In the AuditRoutes sub-section, add the following new route:

```
<Route name="Audit_CLOUD_ELK">
<add key="Http" value="http://<LOGSTASH_HOST_MACHINE>:PORT"/>
<add key="DisableIPAddressMasking" value="false" />
<add key="CompactHttpFormat"/>
</Route>
```

8. Replace the **<LOGSTASH_HOST_MACHINE>** value with the address of the Logstash Host Machine.
9. Replace the **PORT** value with the port used by Logstash.
10. Add any additional keys for routing levels or profiles to this route as desired.
11. Save the file and restart the application.

Testing Your Installation

Test to see that the directory is functioning and accessible. Open Internet Explorer from a client machine and go to the following URL: **http://machinename/ArchiveLink/admin/login.aspx**. Substitute the correct machine name in the example where "machinename" is specified.

Enabling the Integration for Microsoft Outlook Module to Interface with SAP

If you plan to use the Integration for Microsoft Outlook module to archive messages and attachments to SAP, you must set a registry setting.

Caution: Modify the registry at your own risk. Incorrectly editing the Windows registry can cause serious problems that may require you to reinstall your operating system. Be sure to back up the registry before making any changes to it. For more registry information, see the following Microsoft articles: http://support.microsoft.com/kb/256986 and http://technet.microsoft.com/en-us/library/cc725612.aspx

To set the registry setting:

1. Select **Start | Run**.
2. Enter **regedit**.
3. Click **OK**.
4. Expand the HKEY_LOCAL_MACHINE\Software\Wow6432Node\Hyland\DMDesktop (64-bit operating systems).
5. Right-click on the **DMDesktop** node and select **New | DWORD Value**.
6. Enter **ArchiveLinkEnabled**.
7. Double-click on the new value.
8. Enter **1** in the **Value data** field.

Troubleshooting

Error and Batch Administration

From time to time, the ArchiveLink Server may encounter errors when linking documents. Because processing of BAPI requests occurs asynchronously to their submission, users submitting a BAPI request on a scan station only know that the request was successfully transmitted and contained all of the necessary data for a valid request. This does not mean that the request succeeded. For this reason, the ArchiveLink Server records all requests that have errors at processing time. To view errors, go to **http://servername/virtualdirectoryname/ admin/main.aspx.** Example: **http://machinename/archivelink/admin/login.aspx**. Expand the **Barcodes** node and click the **Barcode Documents in Error** link.

Configuration and connectivity issues will be the root cause of many errors. For example, a scan queue is configured to use a document type that has no configured repository. Similar errors would result with connectivity issues between the ArchiveLink Server and the SAP R/3 system. Such errors should be rare however, as network connectivity issues will also likely block ArchiveLink Server requests as well.

Errors can be removed with the remove button, or can be allowed to process through in due course. Configuration changes do not require an ArchiveLink Server reboot for the ArchiveLink Server to refresh settings. When administration changes take place, the ArchiveLink Server will recognize that its cached settings are out of date and reload the appropriate repository or configuration settings. The next time that the BAPI pooling period has elapsed, these settings will be refreshed.

Administrators may also view the names of the Batches pending processing. Depending on the BAPI polling type, request frequency, and current errors, this table may or may not have a tendency to remain empty for much of the time. To view pending batches, go to **http:// servername/virtualdirectoryname/admin/login.aspx.** Example: **http://machinename/ archivelink/admin/login.aspx**. Expand the **Barcodes** node and click the **Pending Barcode Batches** link. To remove a pending batch, click the **Remove** button in the **Action** column next to the batch. Click **OK** to confirm the removal.

If you need to find the version of Core Services that Connector for use with SAP ArchiveLink is using, the ArchiveLink directory's **web.config** file has a **version_num** tag that is equal to the version currently installed.

Error While Using the Content Server

If a message displays stating **Unable to find script library '/aspnet_client/system_web/2.0/ WebUIValidation.js'. Trying placing this file manually, or reinstall by running 'aspnet_regiis - c'.** the **aspnet_regiis.exe** file must be run from the following location: **c:\windows\Microsoft.NET\Framework\v2.0.20727\aspnet_regiis.exe**.

Diagnostics Console Informational Message

When using the Connector for use with SAP ArchiveLink, a message stating **Request for 'ArchiveLink\adminContRep' is not recognized.** is continually logged to the Diagnostics Console. This message is not an error. It is an informational message, sent from SAP to ensure that the Connector for use with SAP ArchiveLink is functional.

Documents Are Not Archived into OnBase

If outbound documents from SAP are not being archived into OnBase, those documents will be listed in the SM58 table within SAP. These documents can be reprocessed to archive them into OnBase. To reprocess these documents:

1. In SAP, enter **SM58** in the upper left hand corner input box.
2. Click the green check mark button or press **Enter**.
3. Place your cursor on the item that you would like to process and click.
4. Press **F6**.

ActiveX Controls Fail to Load

ActiveX controls may fail to load on workstations running Internet Explorer. Depending on the workstation's Internet Explorer security settings, one of the following symptoms may occur:

- The ActiveX control fails to load, and an icon with a red x is displayed in the ActiveX component's location.
- The Information Bar is displayed, providing the option to **Run** or **Don't Run** the ActiveX control. When the user clicks **Run**, the ActiveX control fails to load.
- Internet Explorer displays the error, **Failed to load [control name] ActiveX control**.

Cause — ActiveX controls may fail to load as a result of an ActiveX security setting in Internet Explorer. When enabled, the **Only allow approved domains to use ActiveX without prompt** setting can prevent ActiveX controls from loading properly in OnBase Web applications, including the OnBase Web Client, integrations for SharePoint and SAP, and the Medical Records Management Solution.
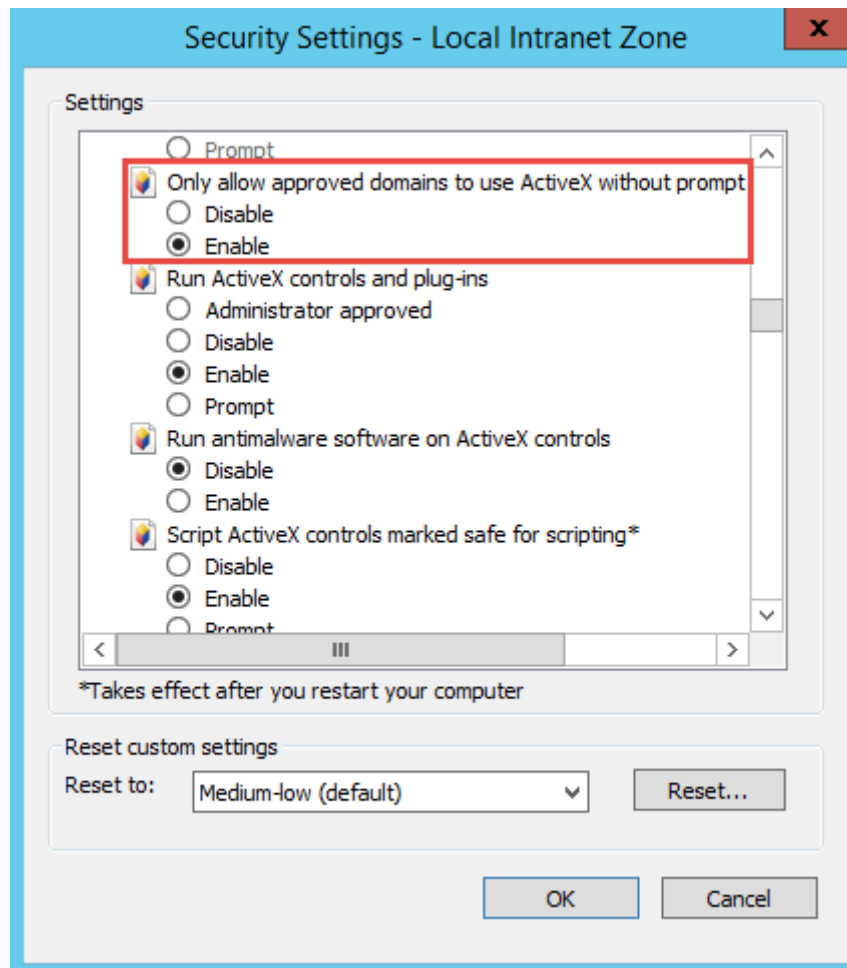
Solution — To ensure that ActiveX controls can load properly, preset the allowed OnBase ActiveX controls and the associated sites in the registry as described in "Per-Site ActiveX Controls," available at the following location:
http://msdn.microsoft.com/en-us/library/dd433050(VS.85).aspx#_itpro

This article describes how to allow specific ActiveX controls to run for specific sites. See the "Code Samples" topic for sample scripts to update the registry. These scripts use the CLSIDs of the ActiveX controls being enabled. The CLSIDs for the OnBase Web ActiveX controls are provided in the following table:

ActiveX Control	{CLSID}
HylandDocumentSelect	{C5526B6F-F197-4705-A554-0612494ADD7D}

ActiveX Control	{CLSID}
HylandViewer	{7F1D1BFA-E7D1-41E0-834F-98C2544CFB9D}
OBXAltDocumentSelect	{22198BEF-75F7-4117-885A-40CCC22F5C88}
OBXAltViewer	{B4E711EF-3137-4E2C-940B-1223BC7103C0}
OBXFileSvc	{CAAB6896-E95D-4476-9B0C-B968FADE56AD}
OBXPopup	{826F6DD1-7095-4BB5-BE96-CB4E8EE0C324}
OBXWebControls	{0FCFCB28-BAF6-422B-985D-A662E207F4A6}
OBXWebDocumentSelect	{A1955722-2B57-4B6D-B5E4-2900AE424672}
OBXWebPrint	{3F2F1376-BD9E-495D-BB8B-66E7A872160B}
OBXWebScan	{DB601251-258A-4743-A522-B45AC1E45B7F}
OBXWebViewer	{A8A7310D-814C-4695-AD02-235675E4BD60}
OBXWorkflowLoadBalance	{D6DB39B0-5BA5-476D-B0A5-3A2D7E937840}

Caution: Modify the registry at your own risk. Incorrectly editing the Windows registry can cause serious problems that may require you to reinstall your operating system. Be sure to back up the registry before making any changes to it. For more registry information, see the following Microsoft articles: http://support.microsoft.com/kb/256986 and http://technet.microsoft.com/en-us/library/cc725612.aspx

For example, a script that allows the ActiveX viewer (OBXWebViewer) to run on all domains may include the following:

```
[HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Ext\Stats\{A8A7310D-814C-4695-AD02-235675E4BD60}\iexplore\AllowedDomains]
```

```
[HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Ext\Stats\{A8A7310D-814C-4695-AD02-235675E4BD60}\iexplore\AllowedDomains\*]
```

More information about writing registry scripts can be found at the following location: http://support.microsoft.com/kb/310516

Verify Links Between SAP and OnBase Documents

Queries exist in ArchiveLink Administration that can be useful when troubleshooting the links between SAP and OnBase documents.

Query for SAP Document

If you want to find an SAP document that is linked to a document in OnBase, you can run a query based on the OnBase document handle. To query an SAP document linked to a document in OnBase:

1. In OnBase ArchiveLink Administration, expand the **Query Options** node.
2. Select the **Query for SAP Document** bar.

Find SAP GUID:

OnBase Handle:

[   ]

Search

3. Enter the document handle of the document that is linked to the SAP document you wish to find in the **OnBase Handle** field.
4. Click **Search**.
5. The SAP GUIDs associated with the document handle entered are displayed.

Query for OB Document

If you want to find a document in OnBase linked to an SAP document, you can run a query based on the SAP Archive GUID. To query a document in OnBase linked to an SAP document:

1. In OnBase ArchiveLink Administration, expand the **Query Options** node.
2. Select the **Query for OB Document** bar.

Find OnBase Handle(s):

Archive GUID:

[   ]

Search

3. Enter the **Archive GUID** of the SAP document linked to the document in OnBase that you wish to find.
4. Click **Search**.
5. The document handle is displayed.

Contacting Support

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

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

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

The Connector for use with SAP ArchiveLink module's virtual directory and OnBase side server setup can be installed using the Hyland Connector for SAP ArchiveLink installer. This installer can be found in the **..\install\ArchiveLink** folder of your OnBase software build.

To install Connector for use with SAP ArchiveLink using the installer:

1. Double-click on **setup.exe**. The setup wizard is displayed
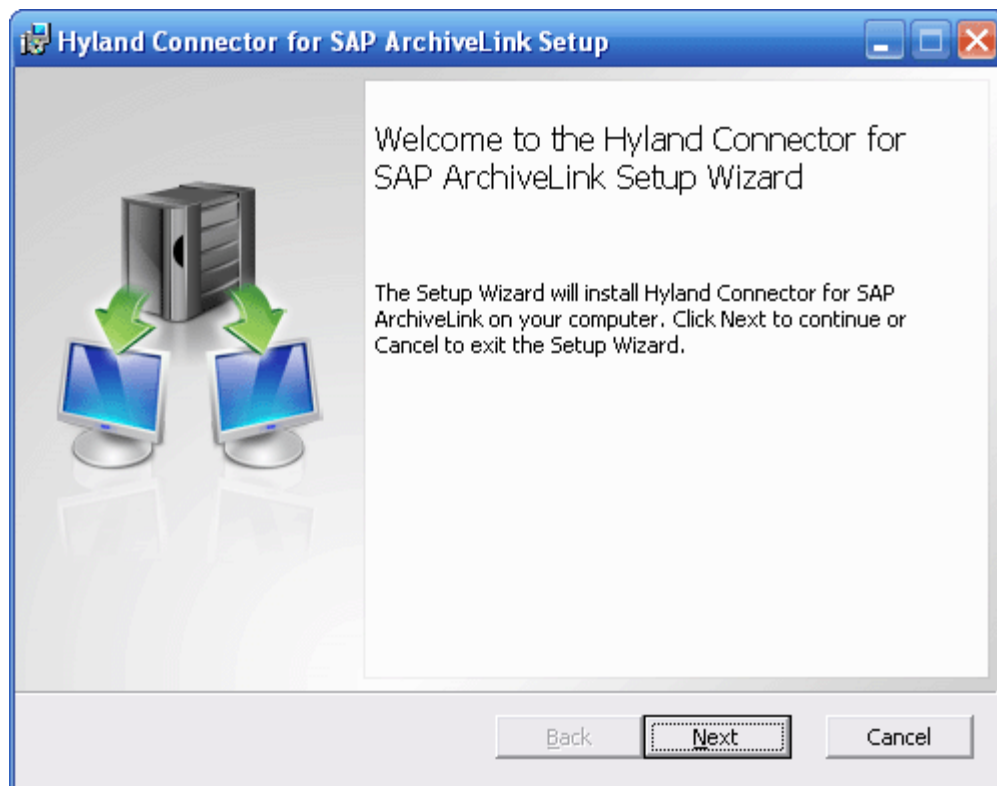
2. Click **Next**. The **Destination Folder** page is displayed.
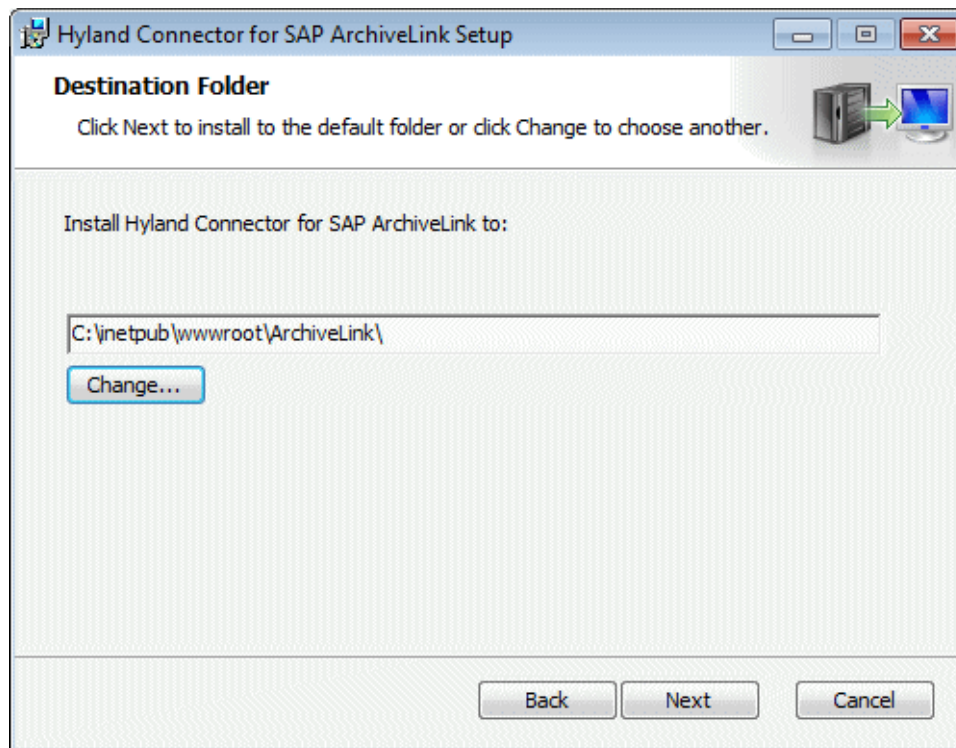
3. You can click **Change** to change the installation location. If you click **Change**, the **Change destination folder** dialog box is displayed.
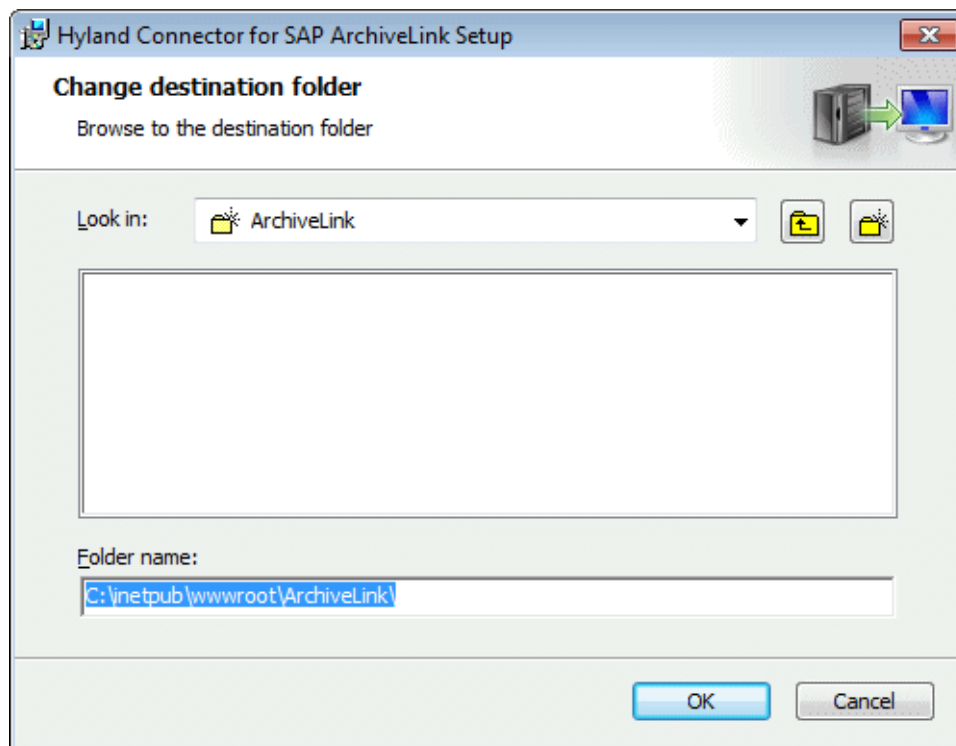
4. Specify the appropriate path and click **OK**.
5. Click **Next**. The **Data Source** page is displayed.
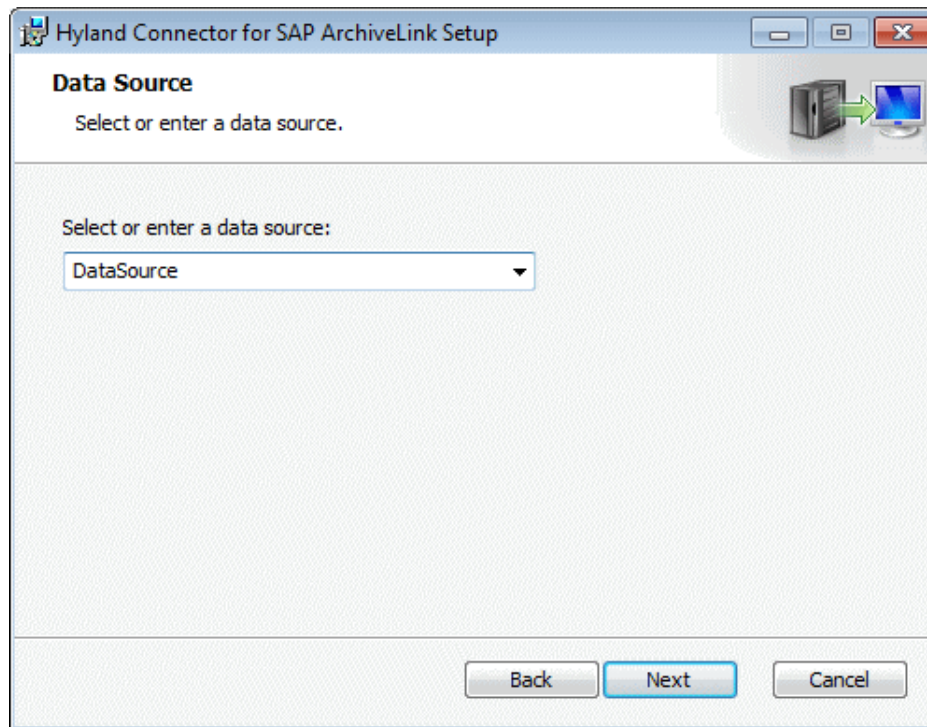
6. Select the appropriate **Data Source** from the drop-down.

7. Click **Next**. The **IIS Settings** page is displayed.
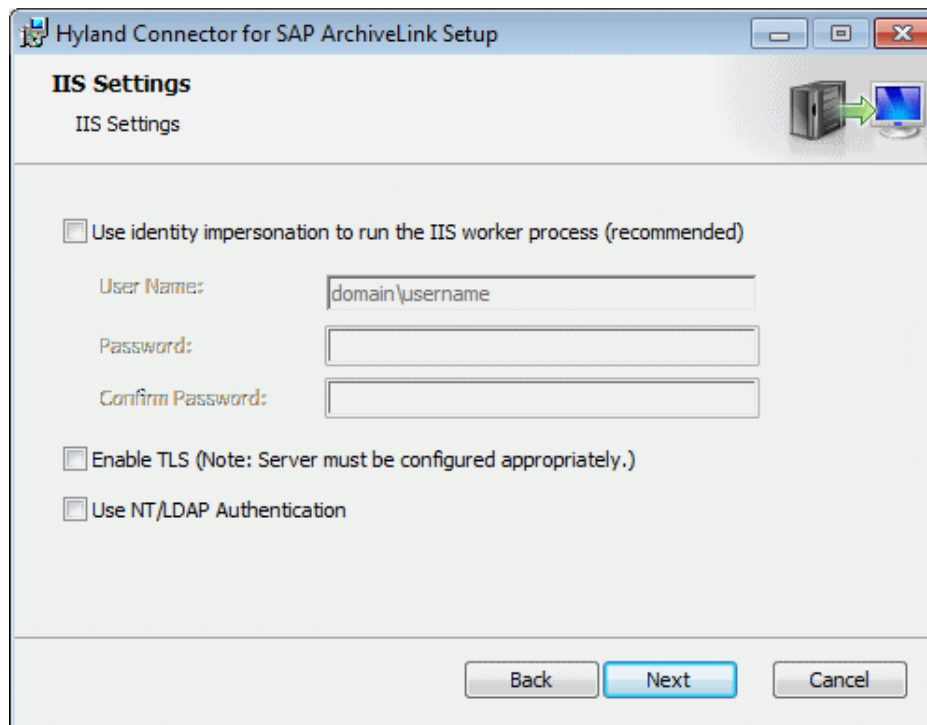
8. Select the appropriate option(s).
    - Select **Use identity impersonation to run the IIS worker process** to use identity impersonation to run your web server under the account specified. If this option is deselected then the web server runs under the local system account.

Note: The impersonation account is granted modify rights to the web server directory (e.g., **AppNet**) and its sub-directories. The installer does not add modify rights for any other groups; if impersonation is not used, you may experience permissions errors in modules attempting to modify files on the web server.

    - Select **Enable TLS** to run the web server via an HTTPS connection. If this option is selected, you must ensure that your server is correctly configured for HTTPS connections.
    - Select **Use NT/LDAP Authentication** to enable NT or LDAP Authentication for your web server.

Note: If using Active Directory - Enhanced, the Application Server that is tied to the ArchiveLink server must be configured appropriately in order to log in to the ArchiveLink Administration page. In IIS, under the Feature View of the AuthService.asmc page of the Application Server, **Anonymous Authentication** MUST be disabled, and **Windows Authentication** MUST be enabled. For more information,

9. Click **Next**. The **ArchiveLink Settings** page is displayed.
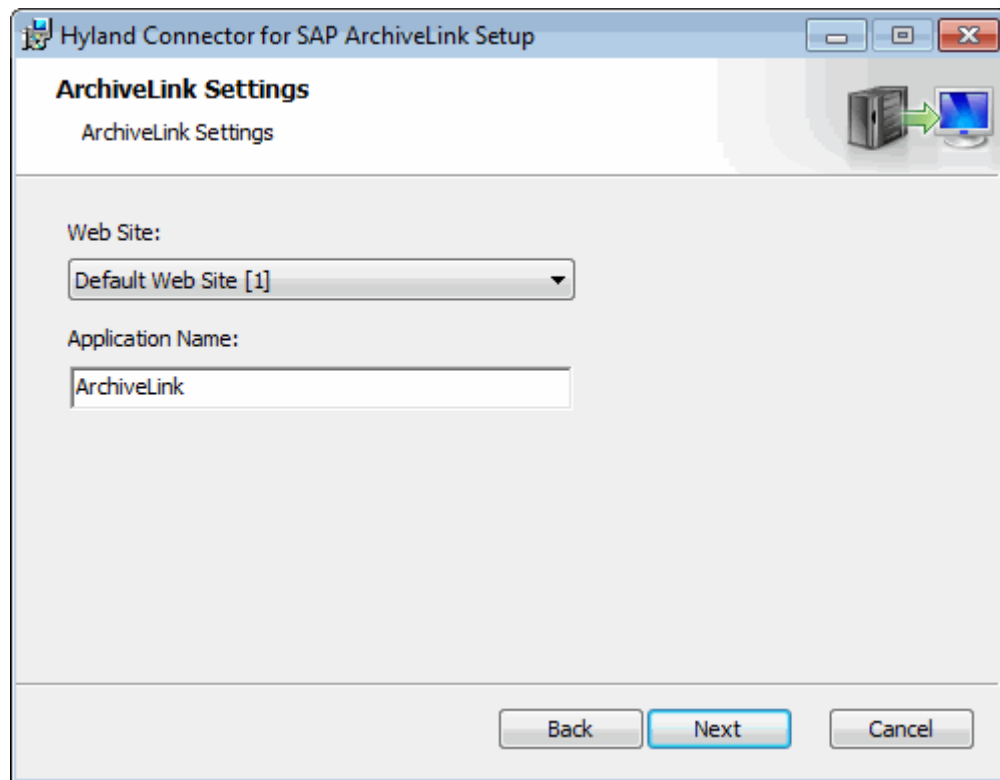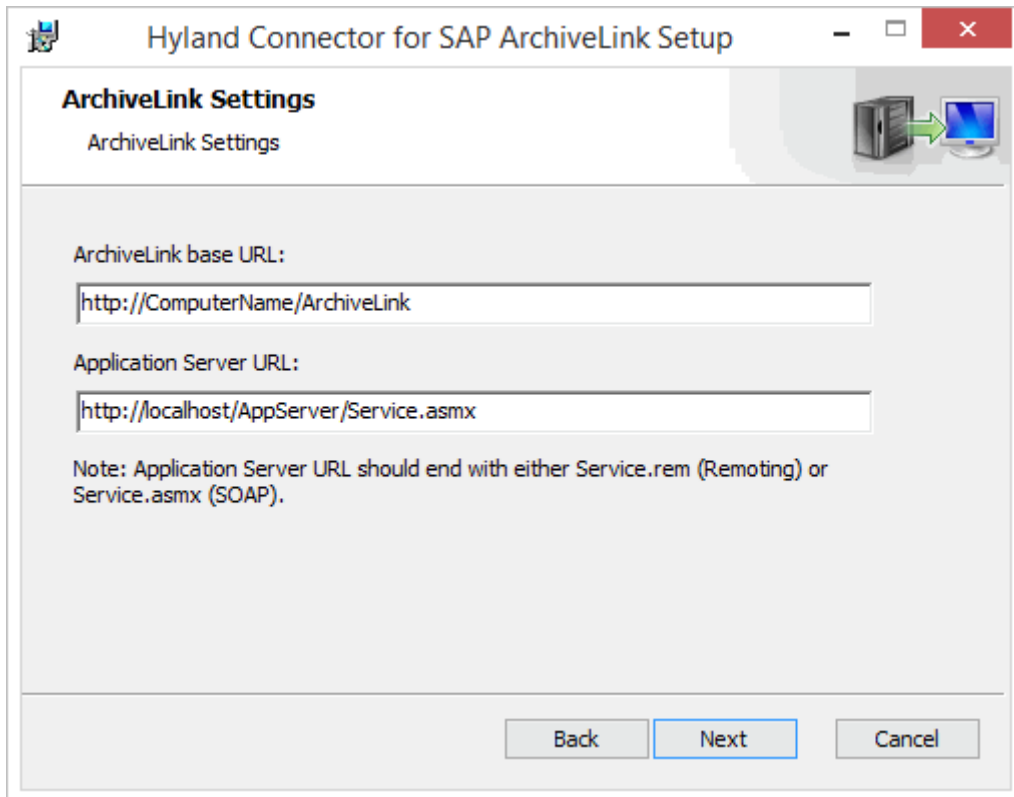
- Select a **Web Site** to install the SAP ArchiveLink application to from the drop-down list. The **Web Site** list is populated with the servers configured in IIS and available to the target machine.
- Enter a name for the SAP Archivelink application in the **Application Name** field.

10. Click **Next**. The **DocPop Settings** page is displayed.
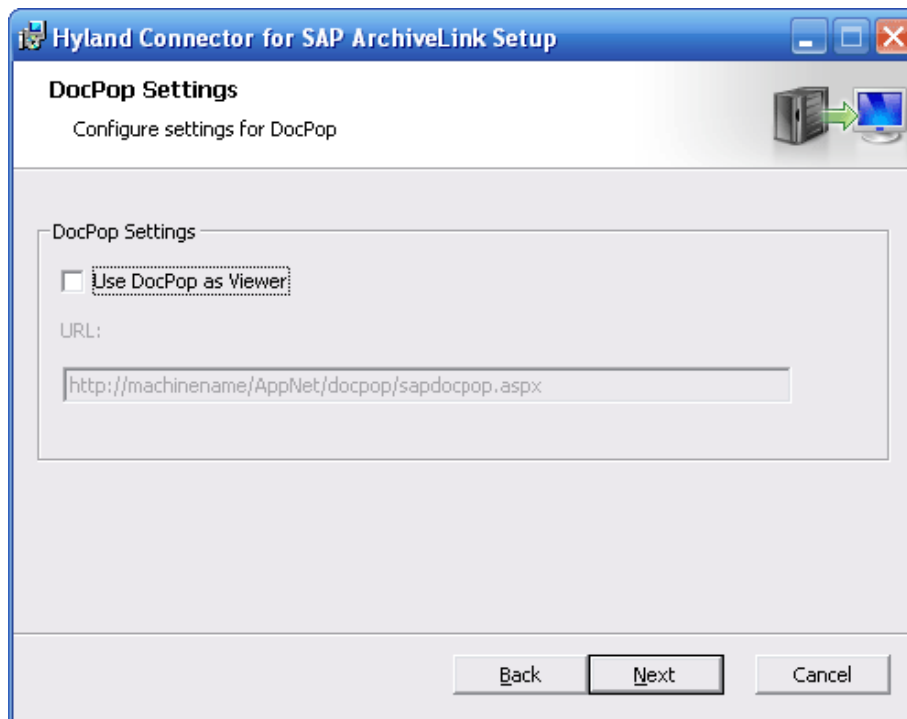
11. If you want to use DocPop as the viewer, select the **Use DocPop as Viewer** option. Specify the **URL** for to the DocPop.aspx page.

12. Click **Next**. The **ArchiveLink Settings** page is displayed. The **ArchiveLink base URL** and **Application Sever URL** fields are populated with default values.

13. To modify the address used to access ArchiveLink Administration, enter a valid URL in the **ArchiveLink base URL** field, or leave the default value as is.

Note: The URL set here is not the full address used to connect to ArchiveLink Administration, only the first part of the address. When logging in to ArchiveLink Administration using a web browser, you will have to add **/admin/login.aspx** to this base URL. For example, if you use the default **ArchiveLink base URL** shown above, to access ArchiveLink Administration you would navigate to **http://ComputerName/ArchiveLink/admin/login.aspx**.

14. In the **Application Server URL** field, enter the address used to connect to your Application Server.

15. Click **Next**. The **Ready to install** page is displayed.
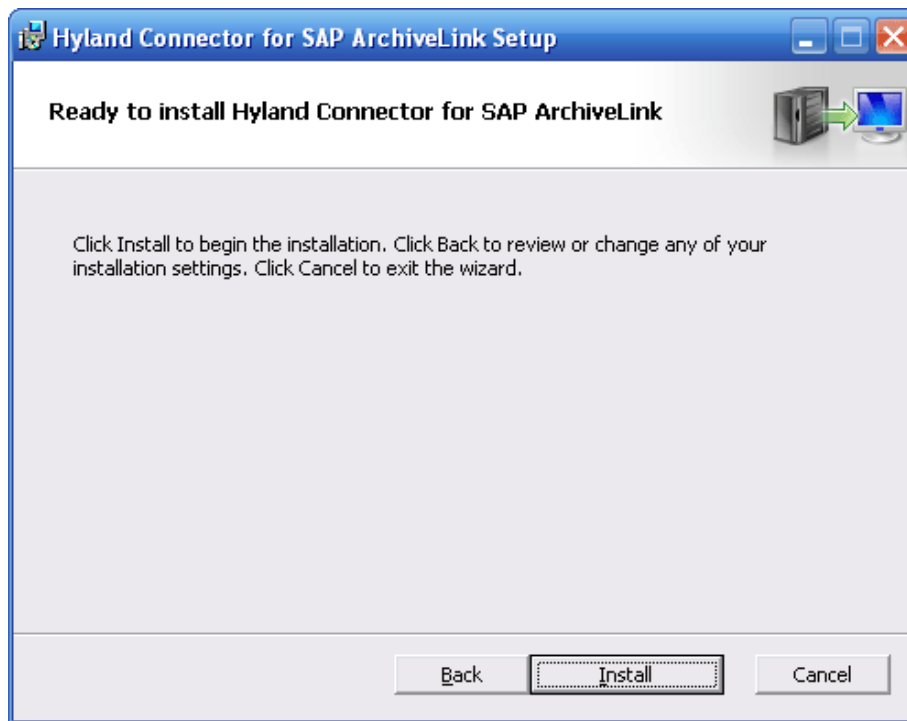
16. Click **Install**.

17. When installation is complete, select **Launch Web Application Management Console** in order to configure the connection string used to access the OnBase database.

Note: You must configure a valid connection string in order for the Connector for use with SAP ArchiveLink to function properly.

18. Click **Finish**. The connection string configuration window is displayed.

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

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

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

20. Click **Add** to start creating a new connection string. The fields on the right become available for interaction.

21. If you are configuring Reporting Dashboards with a secondary connection string with a read-only database user account, select **Options | Populate Read-Only User**. This optional feature populates the **User ID** and **Password** fields with the credentials for the read-only user. See the **Reporting Dashboards** documentation for more information.

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

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

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

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

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

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

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

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

24. Enter the following security information:

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

25. Enter any additional options.

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

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

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

The Unity Client for use with SAP ArchiveLink can be installed using the Hyland Unity Client for use with SAP ArchiveLink installer. This installer can be found in the **..\Install\Unity Client for use with SAP ArchiveLink** folder of your OnBase software build.

Note: If the installer is being copied from the source location to be run from a different location, the entire **Unity Client for use with SAP ArchiveLink** folder and its contents must be copied to the new location.

To install the Unity Client for use with SAP ArchiveLink using the installer:

1. Launch the installer by running **setup.exe**.
    The welcome dialog is displayed.
2. Click **Next**. The **Destination Folder** dialog is displayed.
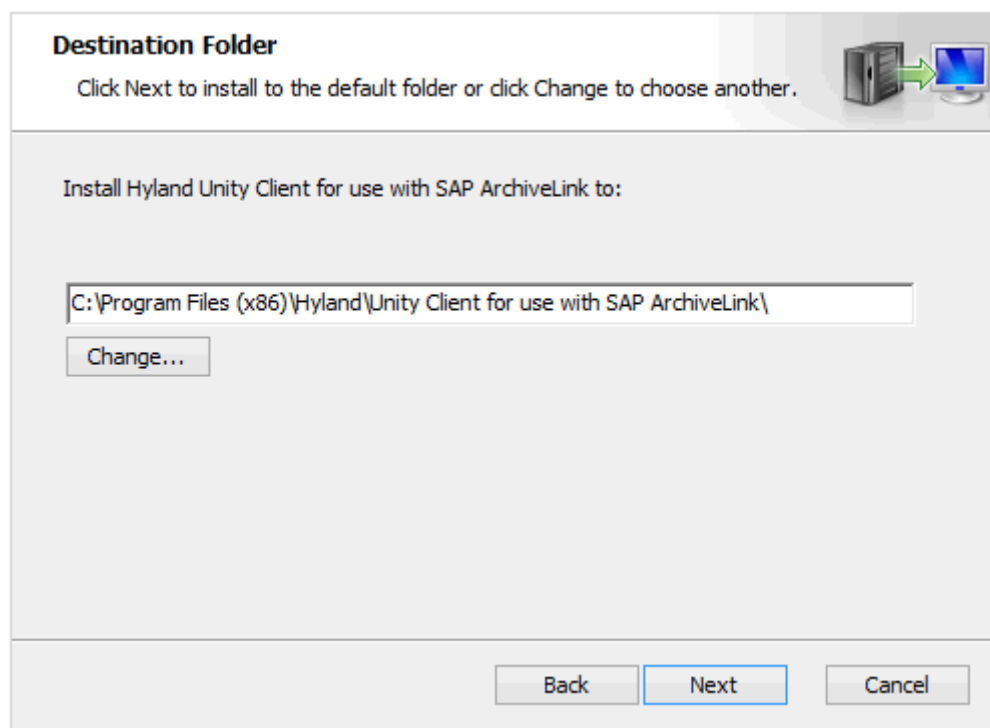
3. Enter the top-level installation directory in the field provided, or click **Change** to browse to it.

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

If **Change** is clicked the **Change destination folder** dialog box is displayed.
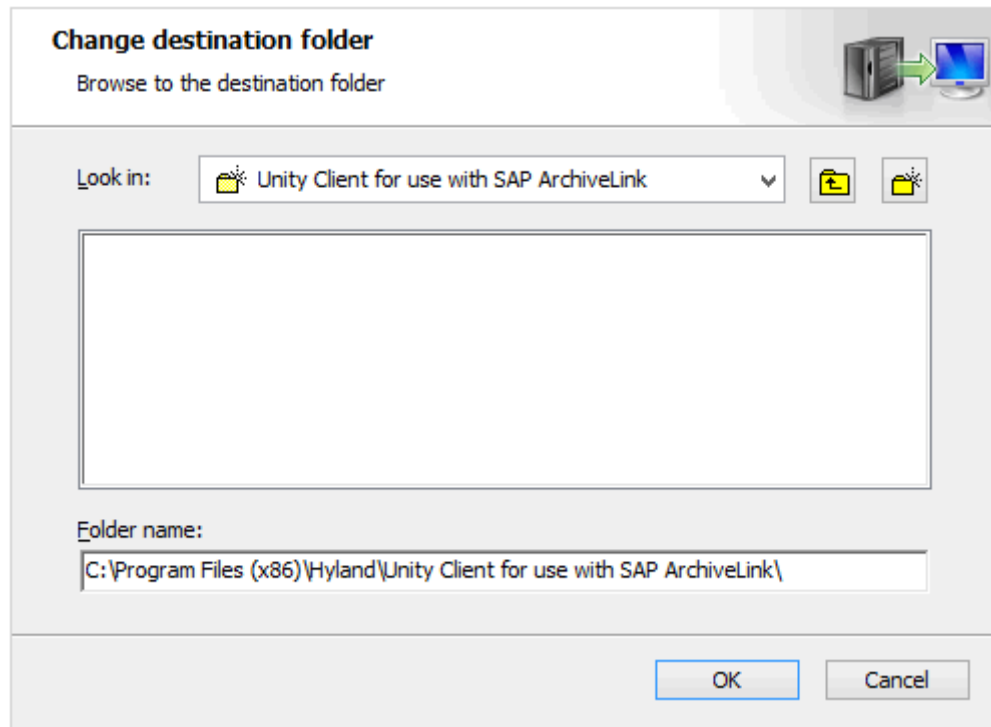
Enter a **Folder name** in the field provided or select it from the **Look in** drop-down list, then click **OK**.

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

4. Click **Next**. The **Custom Setup** dialog is displayed.
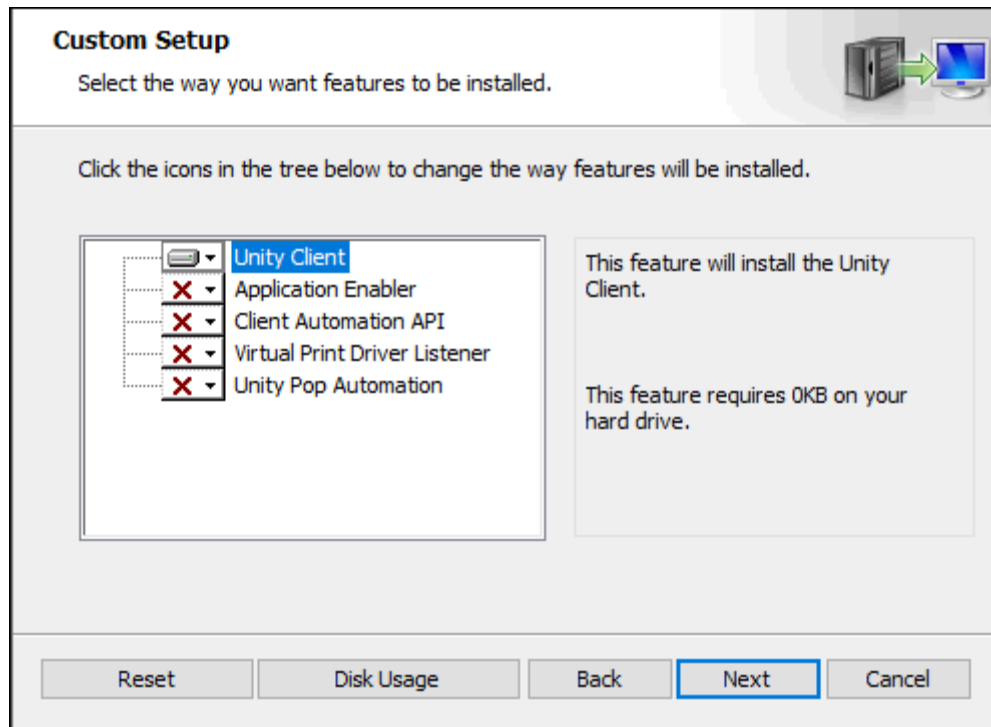
The following features can be installed using the Hyland Unity Client for use with SAP ArchiveLink installer:

Component	Description
Unity Client	Installs the Unity Client for use with SAP ArchiveLink.
Datalogics	Installs Datalogics.
Application Enabler[*]	Installs the Application Enabler module. Application Enabler provides a way to seamlessly integrate an organization's core line-of-business applications with OnBase.
Client Automation API[*]	Installs the Unity Client Automation API, which is used by third-party applications to automate the Unity Client.
Virtual Print Driver Listener[*]	Installs the Virtual Print Driver listener.
Unity Pop Automation[*]	Installs Unity Pop.

[*] Because this component can only run when the Unity Client is in Service Mode, choosing to install this component automatically configures the Unity Client to run in Service Mode.

5. Click the drop-down list beside the name of a component to display the installation options:
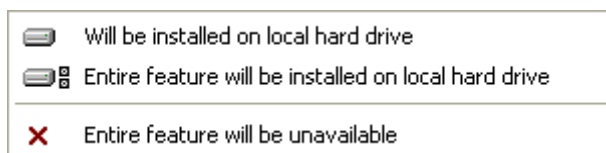
Option	Description
Will be installed on local hard drive	Installs the selected feature and does not install any dependent, optional functionality. To view optional functionality, click the **+** icon next to the feature to expand the sub feature list.
Entire feature will be installed on local hard drive	Installs the selected feature and any dependent functionality. To view the dependent functionality, click the **+** icon next to the feature to expand the sub feature list.
Entire feature will be unavailable	Select this option to remove a feature from the list of features to install.
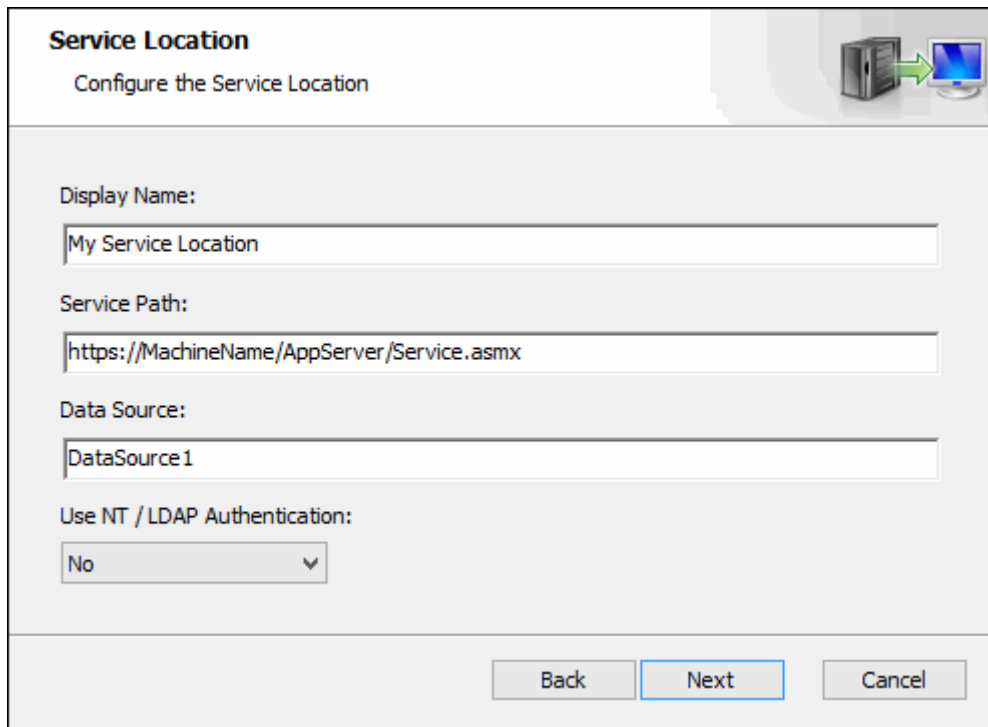
6. Select **This feature will be installed on local hard drive** for each component you want to install.

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

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

8. To change the installation location of a component, select it and click **Browse**. The **Change destination folder** dialog is displayed.
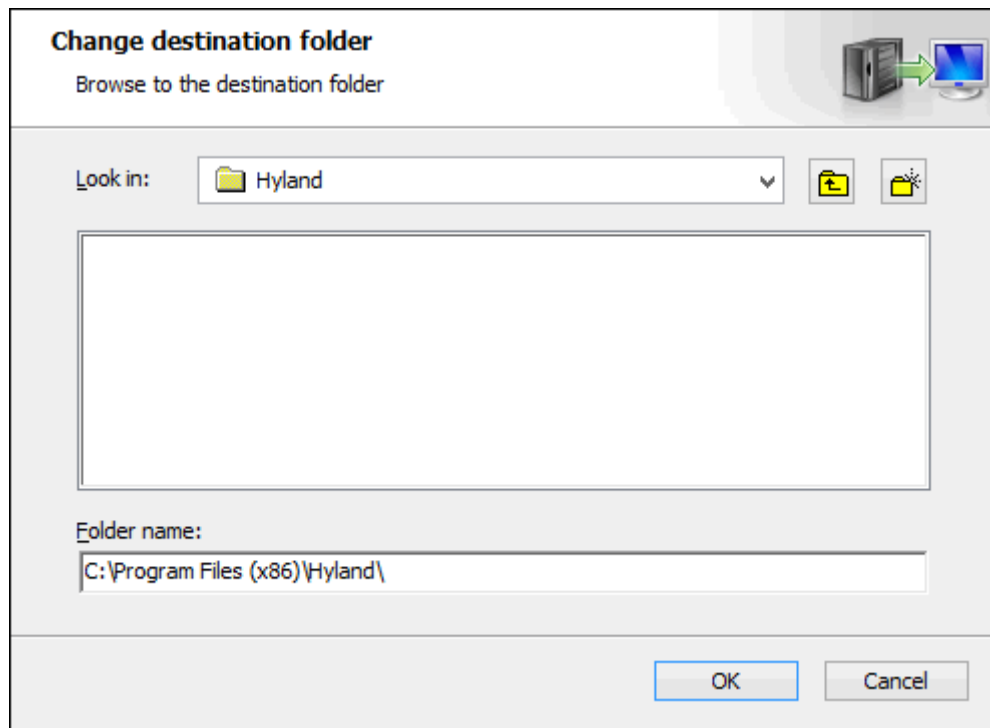
Enter a **Folder name** in the field provided or select it from the **Look in** drop-down list. If the destination folder is not changed, components are installed to default locations.

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

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

Note: Ensure that the **Service Path** reflects the configuration of the OnBase Application Server in regard to HTTPS bindings. If the Application Server is not configured to use HTTPS, setting the Service Path to HTTPS in this installer does not configure an HTTPS binding on the OnBase Application Server.
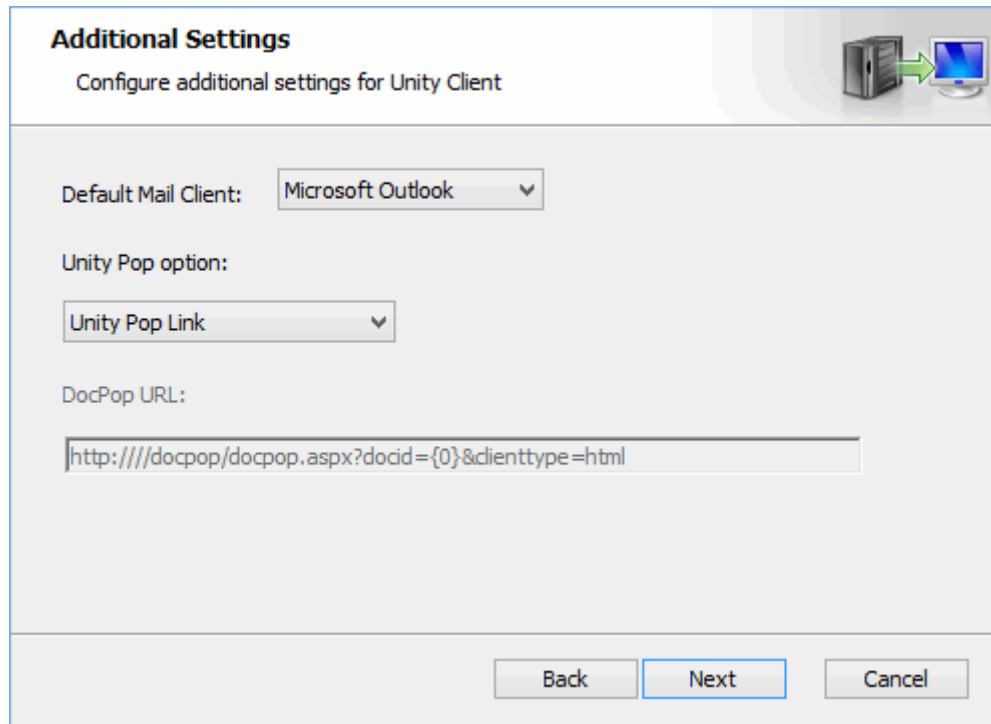
12. In the **Data Source** field, enter the name of the data source connection this component will use to connect to OnBase.
13. Select **Yes** from the **Use NT / LDAP Authentication** drop-down list if your system uses Active Directory or LDAP Authentication, otherwise select **No**.

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

14. Click **Next**. The **Additional Settings** dialog is displayed.
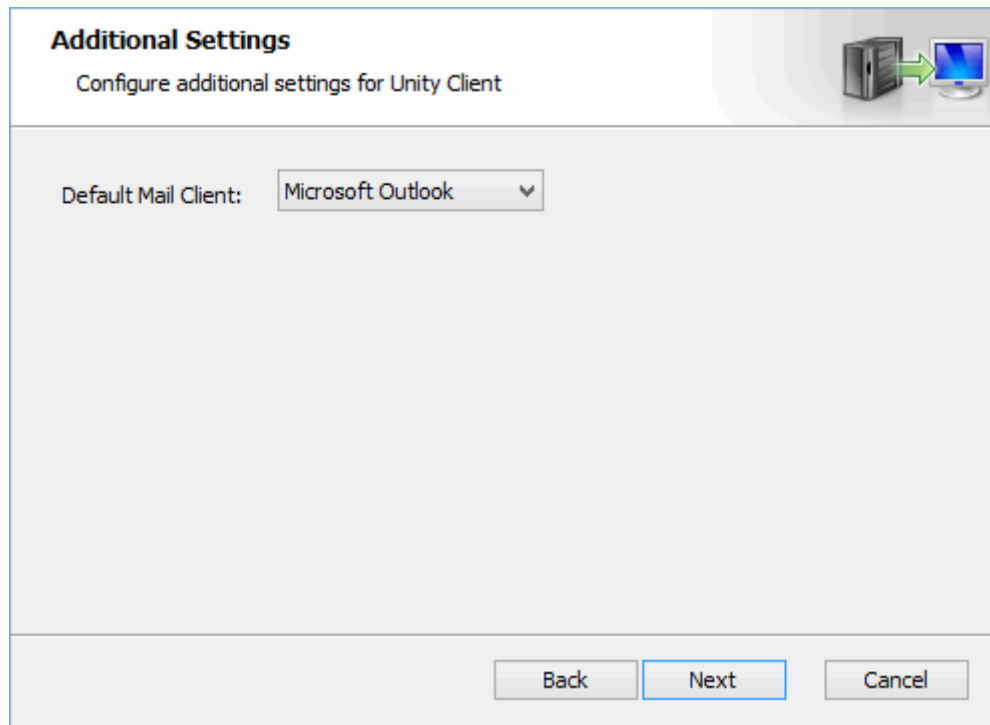
In the **Default Mail Client** drop-down list, select the default email client that users will use to send external mail from within the Unity Client for use with SAP ArchiveLink.

If you chose to install **Unity Pop Automation**, the **Additional Settings** dialog includes Unity Pop options.
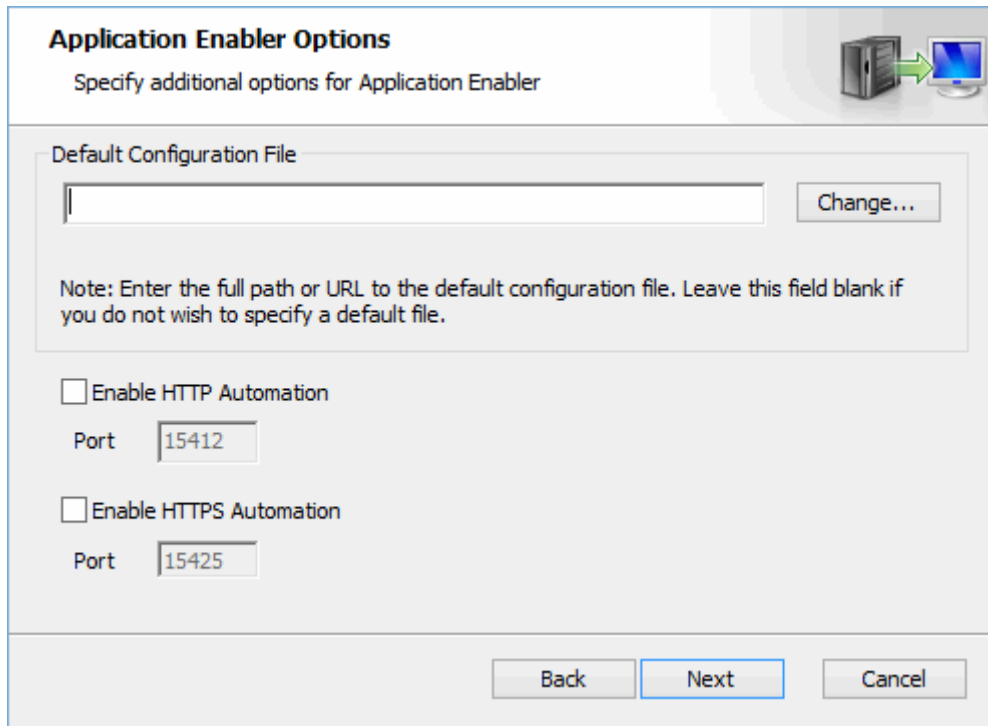
In the **Unity Pop option** drop-down list, select the Pop integration option that will be used for document retrieval and viewing.

Option	Description
DocPop Link	Select this option to use DocPop. The **DocPop URL** field will become available. For more information, see the **DocPop** module reference guide.
Unity Pop File	Select this option to use Unity Pop Files. For more information, see Viewing Unity Pop Files and Links on page 437 and Configuring Unity Pop on page 117.
Unity Pop Link	Select this option to use Unity Pop Links. For more information, see Viewing Unity Pop Files and Links on page 437 and Configuring Unity Pop on page 117. **Caution:** Do not select Unity Pop Link if existing Unity Pop files are still in use by your organization.

15. Click **Next**. If you chose to install **Application Enabler Client**, the **Application Enabler Options** dialog is displayed.

a. In the **Default Configuration File** field, enter the full URL or UNC path to the default configuration file that Application Enabler should use (for example, **\\FileServer\Apps\ApplicationEnabler\DefaultFile.xml**), or click **Change** to navigate to the file to use. Leave this field empty to not configure a default file.

b. Select **Enable HTTP Automation** to expose an HTTP endpoint to allow third-party applications to perform Application Enabler context events.

c. If **Enable HTTP Automation** is selected, type the port number for the HTTP endpoint in the **Port** field. The default value is 15412.

d. Select **Enable HTTPS Automation** to expose an HTTPS endpoint to allow third-party applications to perform Application Enabler context events.

Note: HTTPS Automation requires additional configuration after installation.

e. If **Enable HTTPS Automation** is selected, type the port number for the HTTPS endpoint in the **Port** field. The default value is 15425.

16. Click **Next**. If you chose to install any of the Service Mode components, the **Service Mode Options** dialog is displayed.
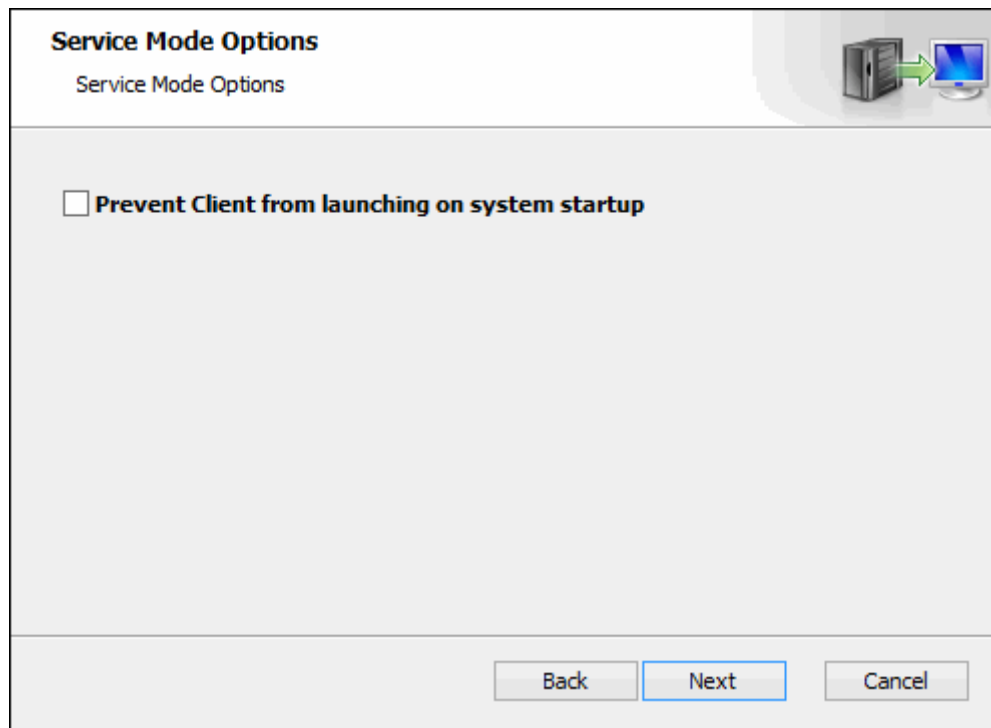
Select **Prevent Client from launching on system startup** to prevent the Client from automatically launching when the system starts.

17. Click **Next**. The **Ready to install** dialog is displayed.
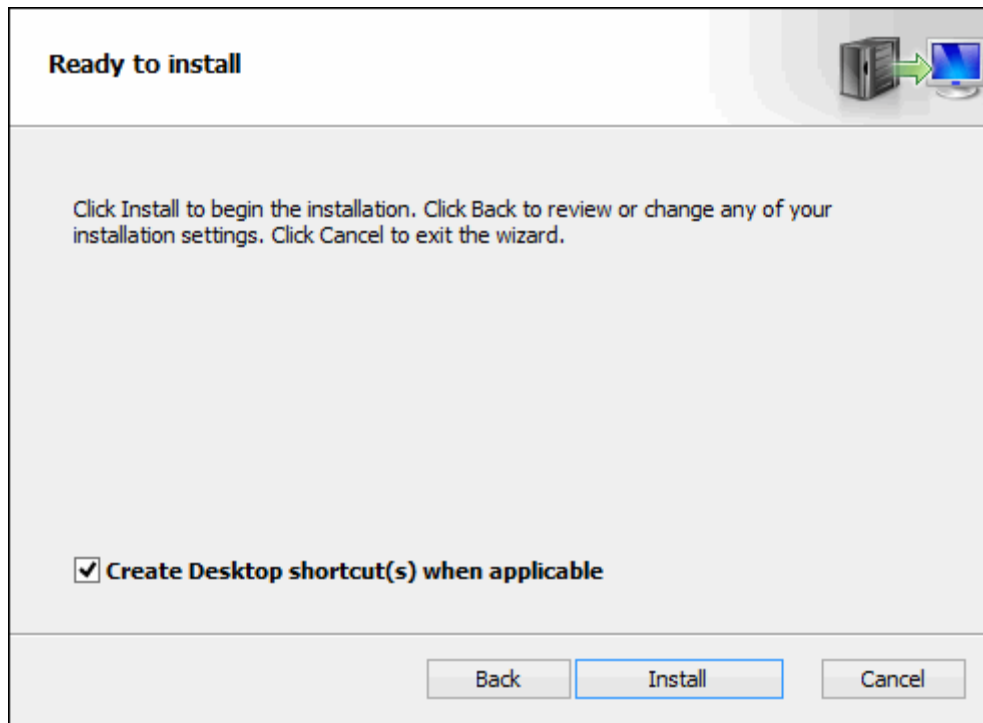
18. Select **Create Desktop shortcut(s) when applicable** to create shortcuts to the installed components on in the Windows **Start | All Programs | Hyland** menu, on the Windows desktop, or in both locations, when applicable.

19. Click **Install** to continue with the installation, or click **Cancel** to cancel the installation.

20. When the installation is complete, click **Finish**.

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

Connector for use with SAP ArchiveLink

Administration Guide

The OnBase integration with SAP is configured in the OnBase Configuration module, ArchiveLink Administration, and SAP itself. The OnBase Configuration module is used to configure OnBase document types for use with SAP, batch applications, and scan queues while ArchiveLink Administration controls the link between SAP and OnBase. The SAP system must be configured to communicate with the OnBase ArchiveLink Server and to use Unity Client for use with SAP ArchiveLink, DocPop, or UnityPop to view or import documents.

Topics in this chapter are organized by where configuration takes place and sequenced according to the order in which they should be performed for an initial configuration of Connector for use with SAP ArchiveLink.

Additionally, other OnBase modules can take advantage of the integration between SAP and OnBase. See System Interaction on page 97.

Note: All information specific to the SAP system must be provided by the SAP Administrator.

Setting Up a Content Repository within SAP

Configuring the OnBase SAP integration begins by creating a repository within the SAP system. This guide will focus on the use of an R/3 compatible SAP system. Users of R/3 compatible application like Business I may have a different UI experience, but the fundamental steps and transactions should remain the same. However, because of differences between SAP applications and versions, SAP Basis Administrators should be available during installation.

Note: Each repository configured within SAP corresponds with one OnBase document type. Each OnBase document type that has an association with SAP should be configured as a separate repository.
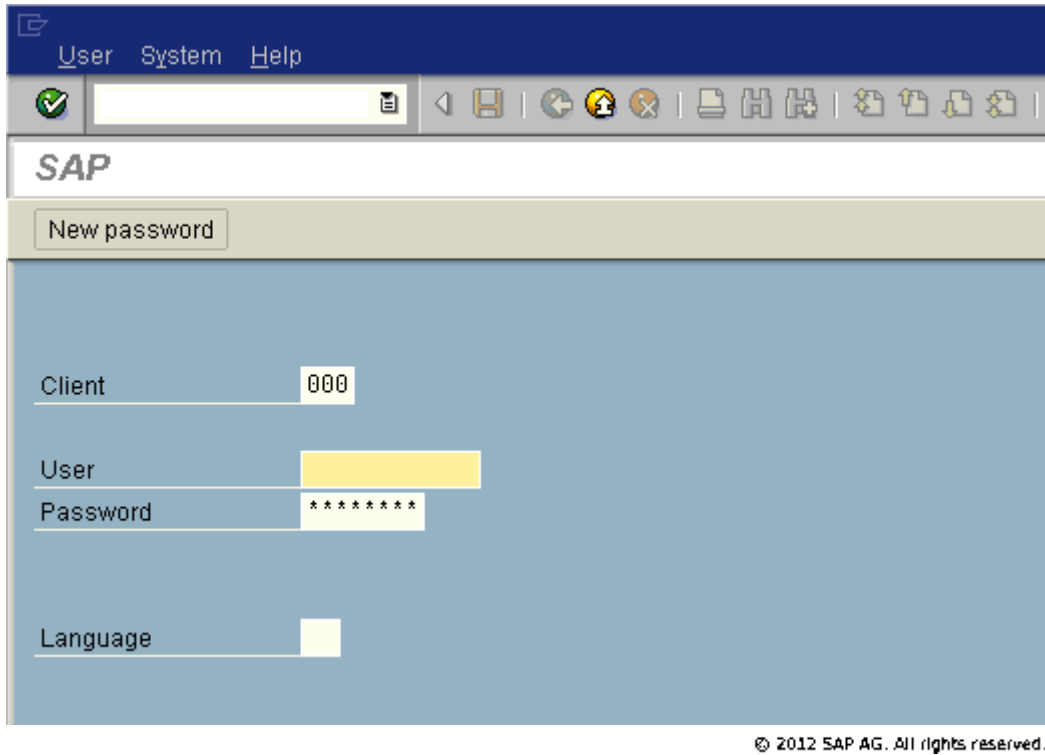
To set up a content repository:

1. Log into the SAP client by clicking **Logon** button.
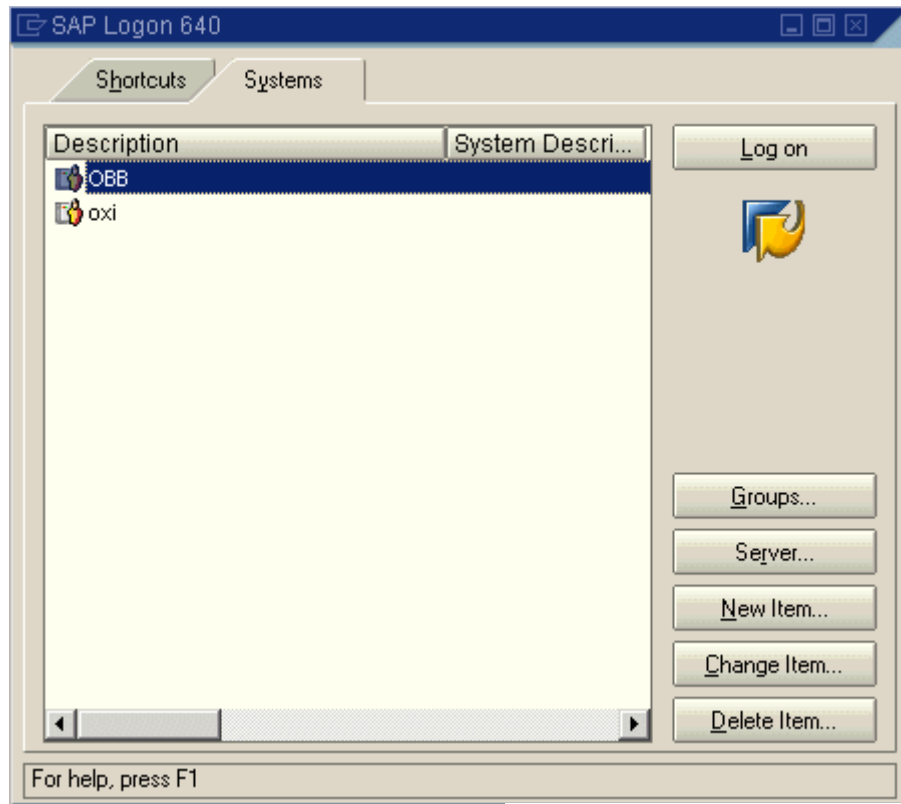
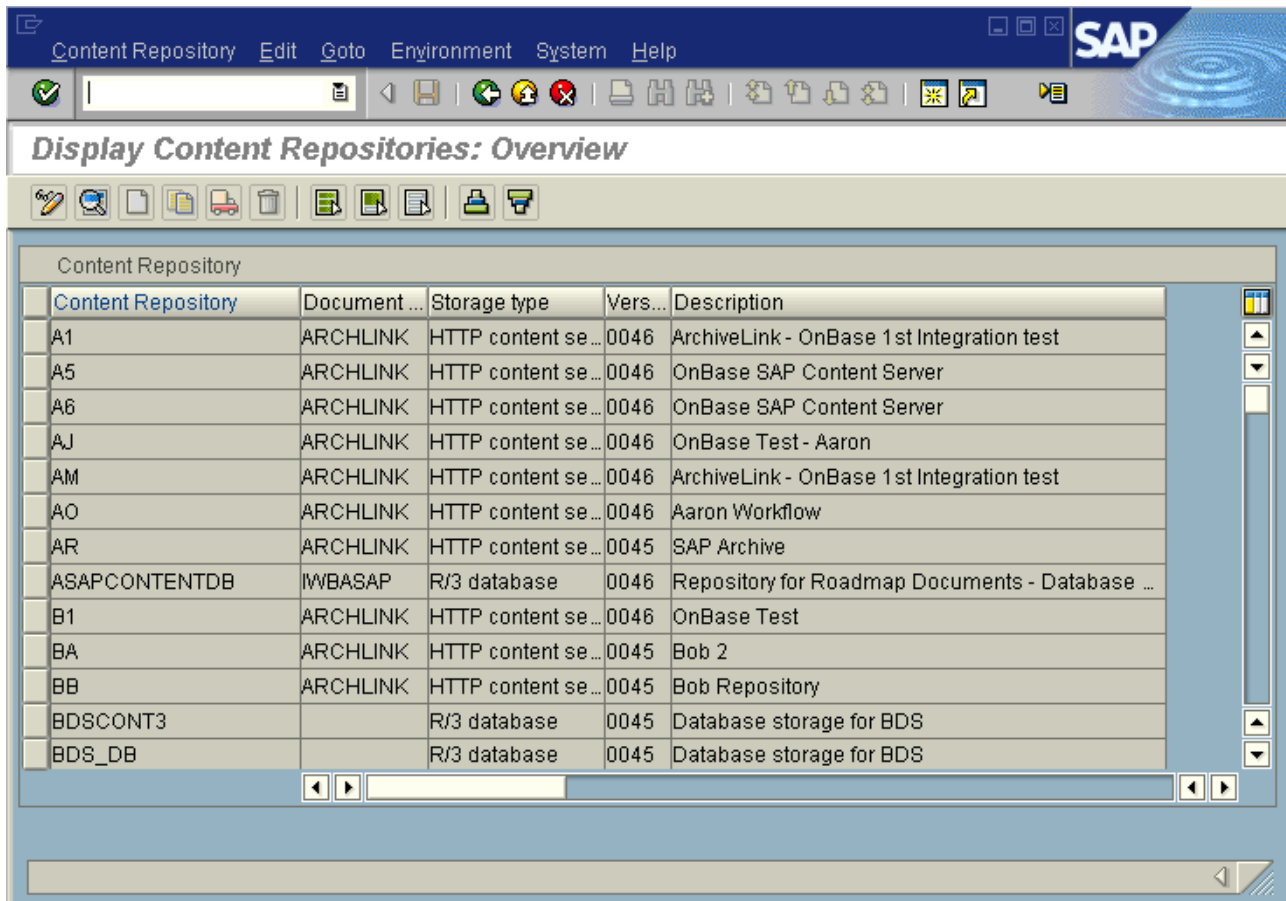2. Enter your client number.
3. Enter the username and password.

4. Enter **en** value for the **Language** (English).

5. Click the **Enter** button to connect to the SAP system.
6. Enter transaction code **OAC0** to customize content repositories.

7. A list of content repositories is displayed. By double clicking on any of the items in the chart you will be able to view additional information on that particular repository.

    Click on the **Display/change** button or press **Ctrl+F4** to change the editing mode so that repositories can modified.

8. Select the **Create** button or press **F5** to create a new repository.

Configuring the Repository

Repository information may now be entered.

To configure a repository:

1. Click **Full Administration** to enable access to additional fields. The screen below shows the full content repository details.

2. Enter the appropriate parameters. Field descriptions follow.

Recipient Fields	Description
Content Rep.	Enter a 2 character name for the content repository. This should be the same as the repository name entered in Create Repositories on page 68. **Note:** The name of the content repository must be unique. That is, it must not be used by any other existing content repository in SAP.

Recipient Fields	Description
Description	Enter in a brief description for the repository.
Storage Type	**HTTP content server** should be selected.
Document Area	Set the Document Area to **ArchiveLink** when scanning or importing images. Set the Document Area to **Data Archiving** when performing data archiving and DART.
Version no	The OnBase ArchiveLink Server is a version 4.7 (0047) interface compatible content server. Enter **0047**. **Note:** The OnBase ArchiveLink Server is also compatible with the version 4.5 (0045) ArchiveLink interface. However, to enable version 4.5 support, the ArchiveLink web.config file must be modified. In the `<appSettings>` section, the value of the `ArchiveLinkVersion` key must be changed from the default `0047` to `0045`.
HTTP Server	Enter the machine name of the OnBase ArchiveLink Content Server.
Port Number	Enter the port number recorded during installation. In most cases, this will be port **80**.
HTTP Script	Enter initial server page for the ArchiveLink Server. When configuring content repositories that are only used for DART or data archiving, the value will be **<virtual_directory_name>/DataArchiveHandler.ashx** For all other content repositories types, the value will be: **<virtual_directory_name>/Service.aspx**
Basic Path	Enter the UNC path for SAP temporary files associated with this Content Repository.
Archive Path	Enter a valid UNC path for the archive path.

3. Ensure that the **No Signature** check box is not selected.
4. If you are configuring an HTTPS connection, enter **%HTTPS** in the upper left hand corner input box. If you are not, skip to step 9.
5. Press **Enter**. Upon pressing **Enter**, additional fields are displayed.
6. Enter **443** in the **SSL Port Number** field.
7. Set the **HTTPS on frontend** to **HTTPS required**.

8. Set the **HTTPS on backend** to **HTTPS required**. The following is an example of a repository configured for an HTTPS connection.

9. Click **Save**.

Test Connection

Once a repository has been saved in SAP and after a corresponding repository has been created in ArchiveLink Administration, the connection should be tested.

Note: See Configuring the OnBase ArchiveLink Server on page 64 for instructions on how to create and configure a repository in ArchiveLink Administration.

To test the connection, click the **Test connection** button. Upon a successful connection, a message stating **Connection test for content repository <name> was successful** is displayed at the bottom of the screen.

Send Certificate

After a successful connection test has been completed, a certificate can be sent from SAP. To send a certificate, click the **Send certificate** button. If a certificate is sent successfully, a **Certificate sent successfully** message is displayed at the bottom of the screen.

Note: It is recommended to send a certificate for each repository that is created. One time activation applies to all certificates sent from a single SAP instance.

After sending a certificate from SAP, you must activate the certificate. To activate a certificate:

1. Access ArchiveLink Administration in Internet Explorer. Example: `http://machinename/ArchiveLink/admin/login.aspx`.
2. Expand the **Configuration** node
3. Click **Certificates**.
4. Click **Activate** next to the appropriate certificate.

Certificates can be reactivated by clicking the **ReActivate** button next to the certificate. This is especially helpful when a certificate expires and a new certificate needs to be sent. Clicking **ReActivate** removes the out-of-date information pertaining to the certificate and enters the new information. When a reactivation is successful, a message stating **Certificate Re-Activation Successful** is displayed. If reactivation fails a message stating **Certificate Re-Activation Failed** is displayed.

Note: To delete a certificate, click the **Delete** button next to the appropriate certificate.

Configure SAP Document Type

An SAP Document Type must be configured in order to hold the document description in SAP, along with the file format information. This is specifically for SAP transaction code OAC2.

To configure the SAP Document Type:

1. Navigate to OAC2.
2. Click **New Entries**.
3. Enter a name for the document type in the **Document Type** column.
4. Enter a description for the document type in the **Description** column.
5. Select the Document Class. For example, for a tiff document, select FAX, for a PDF document, select PDF.
6. Press **Enter**. If a warning message is displayed, press **Enter** again.
7. Click **Save**.

Link Content Repository to Document Type (SAP TCODE: OAC3)

Linking the Document Type to the content repository provides the ability for a document in OnBase to be linked with an SAP Business Object.

To link a content repository to a Document Type:

1. Navigate to OAC3.
2. Click **Change**.
3. Click **New Entries**.
4. Enter an SAP Object type in the **Object Type** field. Options include:
    - Enter BKPF for an FB60 invoice
    - Enter BUS2012 for a Purchase Order
    - Enter BUS2081 for MIRO invoices
5. Enter the document type in the **Document Type** field. This is the name of the OAC2 document you created earlier.
6. Enter the value of **X** in the **Status** field.
7. Enter the content repository you created in Setting Up a Content Repository within SAP on page 54 in the **Storage System** field.
8. Enter **TOA01** in the **Link** field. This is the SAP Link table for the ArchiveLink integration.
9. Click **Save**.

Configuring XI/PI to Accept Communications with OnBase

Note: Not all systems use XI/PI, and it is not required to use Connector for use with SAP ArchiveLink.

In addition to setting up an HTTP destination for SAP XI, there are a few things that need to be configured. First, BAPIs need to be exposed in SAP XI in order for OnBase to interact properly with the SAP system. Secondly, the following parameters should be used when configuring XI/PI:

Web Method Name	Sender CC	Interface/BAPI
MI_NONPOInvoice_os	Sender_SOAP_ NONPOInvoice	BAPI_ACC_INVOICE_RECEIPT_ POST
MI_ArchivConnectionInsert_os	Sender_SOAP_ ArchiveInsert	ARCHIV_CONNECTION_INSERT
MI_ArchiveProcess_os	Sender_SOAP_ ArchiveProcess	Archiv_Process_Rfcinput
MI_POInvoice_os	Sender_SOAP_ POInvoice	BAPI_INCOMINGINVOICE_ CREATE
MI_InvoiceParking_os	Sender_SOAP_ ParkInvoice	BAPI_INCOMINGINVOICE_ PARK
MI_POGetDetail_os	Sender_SOAP_ POGetDetail	BAPI_PO_GETDETAIL
MI_InternalOrderGetDetail_os	Sender_SOAP_ InternalOrderGetDetail	BAPI_INTERNALORDER_ GETDETAIL
MI_IncomingInvoiceGetDetail_os	Sender_SOAP_ IncomingInvoiceGetDetail	BAPI_INCOMINGINVOICE_ GETDETAIL
MI_BarcodeSendList_os	Sender_SOAP_ BarcodeSendList	BAPI_BARCODE_SENDLIST
MI_ArchivBarcodeGlobal_os	Sender_SOAP_ ArchivBarcodeGlobal	ARCHIV_BARCODE_GLOBAL
MI_InternalOrderCreate_os	Sender_SOAP_ InternalOrderCreate	BAPI_INTERNALORDER_CREATE
MI_RFCReadTable_os	Sender_SOAP_ RFCReadTable	RFC_READ_TABLE

Note: All of the objects for these methods must be kept as the default names given by XI when you map them from the BAPIs. Any create method must implicitly assume a commit call.

Configuring the OnBase ArchiveLink Server

In order to integrate your OnBase and SAP systems, the OnBase ArchiveLink server must be properly configured in ArchiveLink Administration.

To access ArchiveLink Administration, open a web browser and go to the following address: **http://machinename/ArchiveLink/admin/login.aspx**. In the address, **machinename** represents the machine name of the server and **ArchiveLink** represents the name of the virtual directory.

A login screen is displayed. Log in with your OnBase user account and password to access ArchiveLink Administration.

Note: To have access to ArchiveLink Administration, your account must have the **OnBase Configuration** product right. See the **System Administration** documentation for how to assign product rights.

The following topics describe how to perform the necessary configuration in ArchiveLink Administration:

Configure a Destination

A destination corresponding to the SAP destination used for the integration must be created. Some installation sites may have two or more distinct SAP systems that must function in conjunction with the same content server. Each instance of an SAP installation requires the use of distinct connection information to transmit bar code information between the separate installs.

Note: If you are using a SAP Exchange Infrastructure (SAP XI) system, you must configure an HTTP destination. See HTTP Destinations on page 66 for more information.

To create a destination in ArchiveLink Administration:

1. Expand the **Configuration** node.
2. Click the **Destinations** link.
3. Enter the **Destination** name.
4. Enter the **Client** number.
5. Enter the SAP **User** used to log in to SAP.
6. Enter the **Password** for the user entered in the **User** field.
7. Enter **en** for English in the **Language** field.
8. Enter the server name that is housing the SAP system in the **Hostname** field.
9. Enter the **System** number.
10. Enter the **Gateway Host**.

11. Enter the **Gateway Service**.
12. Click **Add**.

Note: All required fields must have values in order for the destination to be saved and added.

Description of Fields

Field	Description
Destination	Enter the destination name of the SAP system.
Client	Enter the three-digit client identifier for the SAP system.
User	Enter the SAP user name used to connect to the R/3 compatible system.
Password	Enter the SAP password. **Note:** Once entered and saved, the **Password** field will display as blank.
Language	Select the language you wish to use. Use the 2-digit SAP language code for the desired language.
Hostname	As BAPI communicates through RFC, it requires the machine name or host to access remote procedure calls on the SAP system. Both hostname and Gateway host use this value, though Gateway Host will be in all capital letters.
System	Enter the system identify for the SAP system. It is common that this value is 01.
Gateway Host	Same value that was used for Hostname, but the value for Gateway Host must be in all capital letters.
Gateway Service	Administrators also must specify the gateway service running on the SAP R/3 compatible system.
Sender ID	ID # of the system that is sending the IDOC request.

Once a destination has been created, it can then be applied to an existing repository. This repository will then send its bar code requests to the configured destination. Destinations can also be modified once created by clicking the corresponding **Edit** button, or deleted by clicking the corresponding **Delete** button.

Note: You can only delete destinations that are not already applied to an existing repository.

You can test a destination connection by clicking the Test button next to the destination. A message will display next to the **Test** button specifying whether or not the connection was successful. Successful messages are displayed in blue. Unsuccessful messages are displayed in red.

Load Balanced Destinations

Load balanced destinations are supported and should be configured according to your SAP Load Balanced Settings. See your Basis Admin for appropriate entries.

To set up a load balanced destination in the OnBase ArchiveLink Administration pages:

1. Expand the **Configuration** node.
2. Click the **Load Balanced Destinations** link.
3. Enter the **Destination** name.
4. Enter the **Client** number.
5. Enter the SAP **User** used to log in to SAP.
6. Enter the **Password** for the user entered in the **User** field.
7. Enter **en** for English in the **Language** field.
8. Enter the target system in the **Target System** field.
9. Enter the message server in the **Message Server** field.
10. Enter the group name in the **Group Name** field.
11. Enter the ID # of the system that is sending the IDOC request in the **Sender ID** field.
12. Click **Add**.

Destinations can be modified once created by clicking the corresponding **Edit** button, or deleted by clicking the corresponding **Delete** button.

Note: You can only delete destinations that are not already applied to an existing repository.

HTTP Destinations

If you are using SAP Exchange Infrastructure (SAP XI), you must set up an HTTP Destination. To set up an HTTP destination in OnBase ArchiveLink Administration:

1. Expand the **Configuration** node.
2. Click the **HTTP Destinations** link.
3. Enter the URL for the HTTP Destination in the **Address** field.
4. Enter the **Port** used for communication for this destination.
5. Enter the SAP XI username that will be used to connect to SAP XI for the destination in the **User** field.
6. Enter the **Password** for the user entered in the **User** field.
7. Enter the appropriate XI channel in the **Channel** field.
8. Enter system identifier for the destination in the **Sender ID** field.

9. If you are using an HTTPS binding, select the **Use SSL** check box.
10. Click **Add**.

Destinations can be modified once created by clicking the corresponding **Edit** button, or deleted by clicking the corresponding **Delete** button.

Note: You can only delete destinations that are not already applied to an existing repository.

Configure General Settings

Before a ArchiveLink Server will function properly, it must be configured to communicate with both the OnBase database and the SAP system. In order to successfully configure a repository, several settings must be set in OnBase ArchiveLink Administration. To configure settings:

1. Expand the **Configuration** node.
2. Click the **Settings** link. Several fields will already been populated based on values provided during the installation process.
3. Specify the appropriate parameters.
4. Click **Save**. Upon successful saving, a message stating **Application Settings Saved** is displayed.

Setting	Description
Datasource	This is the name of the ADO.NET datasource that connects to the OnBase database used for the SAP Integration for ArchiveLink. **Note:** This name must match the name of the connection string in the web.config file.
Username	This is the username of the OnBase user used for logging into OnBase. This must be a service account user. See User Names and Passwords Configuration in the Configuration documentation for further information about service accounts.
Password	This is the password for the user specified in the Username field.
Address Book Location	This is the location where the SAP address book (PBA.PSE) is stored. The location must include pba.pse at the end. For example: `C:\Address\Book\Path\pba.pse` **Note:** SAP account used for integration must have rights to this directory.

Setting	Description
Certificate Path	Enter the path to the certificate folder created during installation. This is the location where certificates are temporarily stored before activation. **Note:** SAP account used for integration must have rights to this directory.
Certificate Password	This is the password used for certificates.
Default File Type	Enter a default OnBase File type number for the ArchiveLink Server. When file types cannot be identified, the ArchiveLink Server will use the specified default file type. This is the file type created during installation.
Default Protection	The default protection box indicates the default SAP protection of a request. Each SAP request falls under one of 4 types: **create, read, update, and delete**. The first letter of each type indicates these permissions. Type **crud** in lower case letters in this field. Values entered in this field do not override the setting on the SAP server.
Polling Period (in seconds)	Number of seconds between polling.

Create Repositories

In addition to creating a repository in SAP, you must create a corresponding one in OnBase ArchiveLink Administration. The repositories on an ArchiveLink Server are the main integration point between the SAP system and the OnBase system. To create a repository:

1. Expand the **Configuration** node.
2. Click the **Repositories** link.
3. Enter the **Repository Name** of the repository.

Note: The name of the repository must match here and in SAP. This name must be unique and not exceed two characters.

4. Enter a meaningful **Description** for the repository.
5. Select the appropriate OnBase **Document Type Name** configured for use with the SAP repository.

    If a Document Type has not yet been configured, see .

6. Enter the MIME type used as the default file format in the **Document Class** field. If the Document Type selected in the **Document Type Name** field has an associated MIME type configured, it will automatically be populated in the **Document Class** field. When the OnBase ArchiveLink Server registers bar codes with SAP, it requires a MIME type. When the OnBase file type has a configured MIME type, this type is used when registering the bar code. However, as MIME type is not a required file type property in OnBase, all content repositories on an OnBase ArchiveLink Server must have a default document class.

Caution: Servers cannot have multiple repositories associated with the same document type.

7. Select the appropriate **Destination**.

Note: Configuring a destination is required.

8. Click **Add**.

Note: For performance reasons, repository, destination and configuration information are stored in a global application cache. For this reason, changes will be reflected within the application cache immediately only on the administrated machine. Applications running in a load-balanced environment require an IIS/web site restart or a reset of the cache of the OnBase Application Server in order to refresh the application cache. In addition, any time the SAP system is restarted, you must restart IIS or reset the cache of the OnBase Application Server.

Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

Configuring BAPI RFC in OnBase Configuration

In order for your OnBase system to integrate with SAP, OnBase must be properly configured. Depending on your SAP and OnBase systems and how you want them to interact, this can include performing the following tasks in the OnBase Configuration module:

Configuring Data Archiving in OnBase

In order to use data archiving with OnBase, there are few necessary configuration steps that must be completed.

- Configure a disk group for the archived data. See the **System Administration** documentation for more information about creating and configuring disk groups.
- Create a custom file format. See Creating A Custom File Format on page 70.
- Create a Document Type specifically for Data Archiving. See Creating a Document Type on page 70.
- Create a repository specifically for data archiving. See Configuring the Repository on page 57 for more information.

Creating A Custom File Format

In the Configuration module:

1. Select **Document | File Formats**.
2. Enter **ALF** in the field and click Create.
3. Select the **Custom** option.
4. In the **MIME Type** field, enter **application/x-reo**.
5. In the **Default Extension** field, enter **REO**.
6. Click **Save**.

Creating a Document Type

In the Configuration module:

1. Select **Document | Document Types**.
2. Enter **SAP Data Archiving** in the field and click **Create**.
3. Select a **Document Type Group** from the drop-down list.
4. Select the **REO** custom file format from the **Default File Format** drop-down list.
5. Select the disk group created for data archiving.
6. Click **Save**.
7. Assign the appropriate user group(s) and click **Close**.

Configure Batch Applications

In order to use late storage without bar codes in SAP, batch level application queues must be configured appropriately.

When documents from any processing module (such as COLD, DIP, etc.) have been committed, the committed documents can then be routed to a Batch Application queue for further processing.

Note: Documents belonging to the **System** Document Type Group in the committed batch (i.e., the Verification Report) are not routed to the Batch Application queue.

Each Batch Application is configured with Batch Application Processes that contain one or more of the processing module's configured queues. For example, a Batch Application may be configured with a Batch Application Process that contains a COLD queue, two DIP queues, and a Document Imaging scan queue. Once the documents in those queues are committed, they will then be routed to the Batch Application queue. The documents do not need to be committed at the same time to be successfully routed to the Batch Application queue.

Configuring Batch Level Application Queues

Note: Batch Application queues are only available when the **Process Configuration** right is granted.

To configure a Batch Application queue:

1. In the Configuration module, select **Import | Batch Applications**. The **Batch Application Configuration** dialog box is displayed.
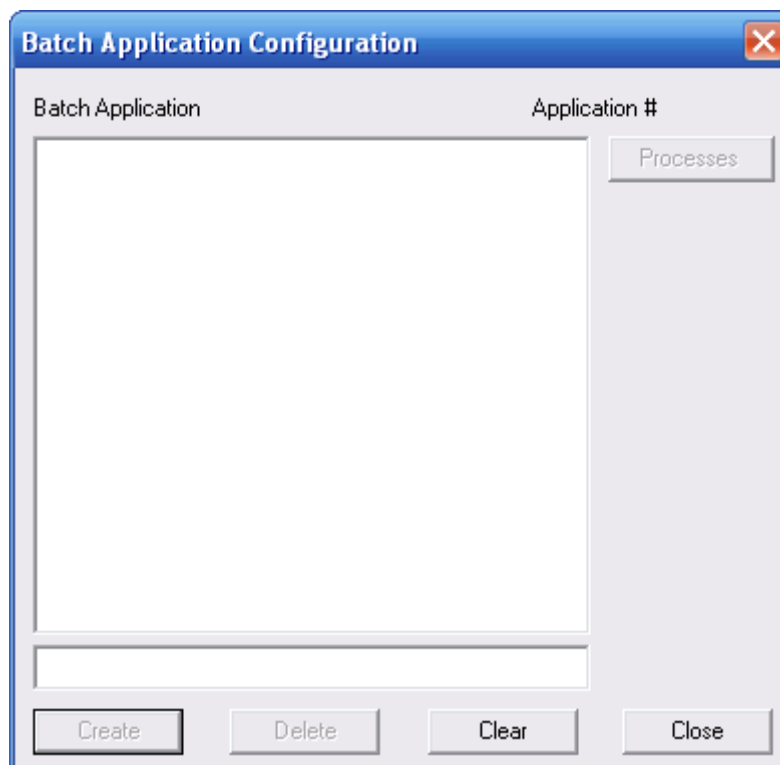
2. Place your cursor in the data entry field and enter an appropriate name for the Batch Application. When finished, click **Create**. The name of the Batch Application will be displayed in the **Batch Application** list.

3. Click the **Processes** button. The **Batch Application Process Configuration** dialog box is displayed.

Note: If multiple Batch Applications have already been configured, select the application you wish to configure a Batch Application Process for, then click the **Processes** button.
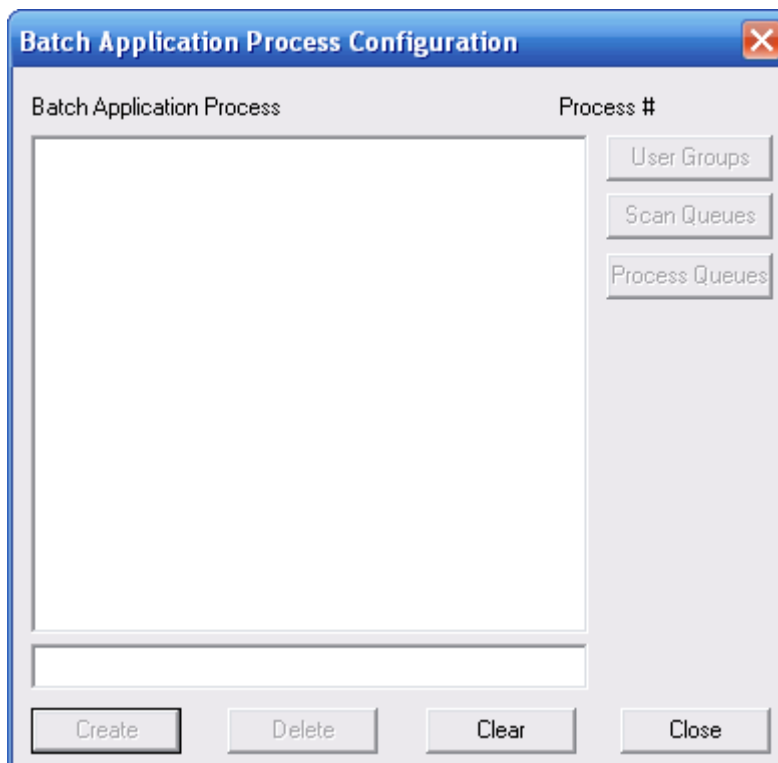
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4. Place your cursor in the data entry field and enter an appropriate name for the Batch Application Process. When finished, click **Create**. The name of the Batch Application Process will be displayed in the **Batch Application Process** list.

   As soon as a Batch Application Process is created, the following buttons are enabled and must be configured appropriately:

   - User Groups. See Configuring User Groups on page 73.
   - Scan Queues. See Configuring Scan Queues on page 74.
   - Process Queues. See Configuring Process Queues on page 75.

5. When finished configuring the Batch Application Process, click **Close** to exit the dialog box.

Configuring User Groups

You must grant the appropriate user groups access to the Batch Application Process. These are the users who need to view or administer the process itself, not the users who need to view the documents imported by the Batch Application Process. To assign user group privileges:

1. In the **Batch Application Process** dialog box, click **User Groups**. The **User Group Assignment - [Batch Application Process Name]** dialog box is displayed.
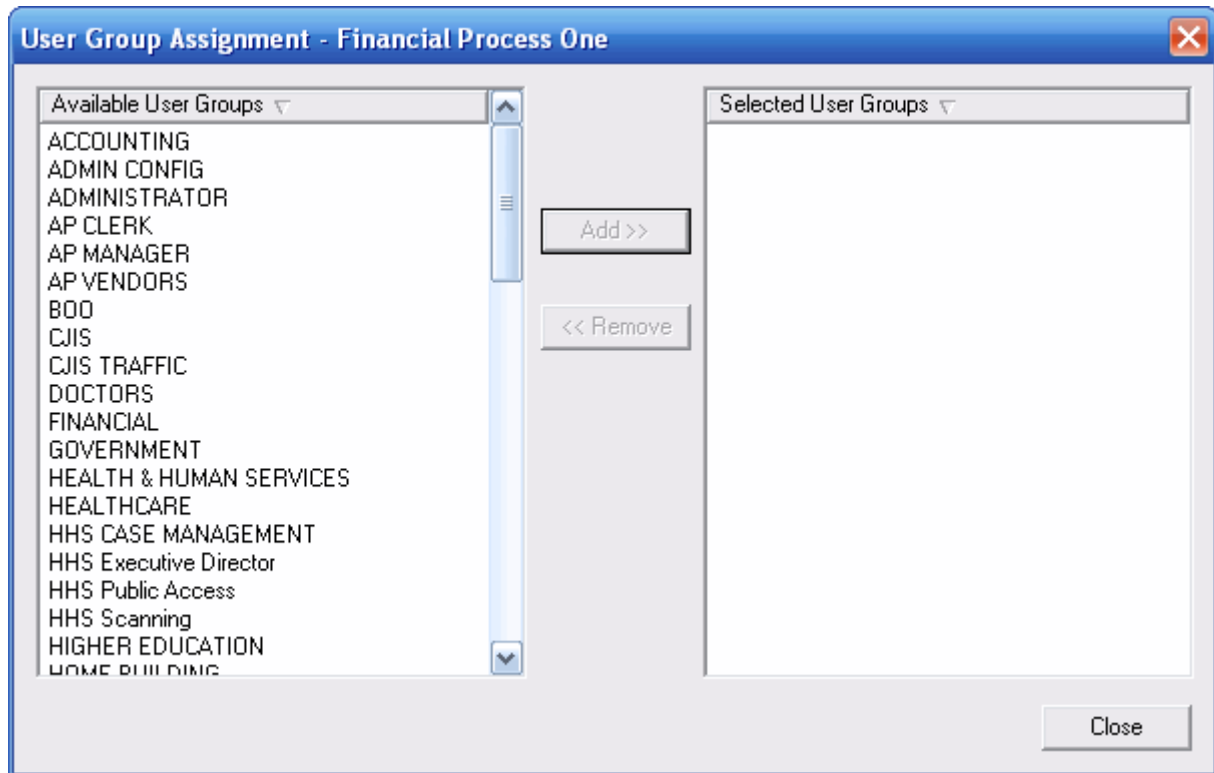
2. Select the user group(s) that should have access to the Batch Application Process from the **Available User Groups** list. Double-click the user group or click the **Add>>** button to add the user group to the **Selected User Groups** list.

Tip: Click **Available User Groups** to sort the list alphabetically.

3. When finished, click the **Close** button to exit the dialog box.

Configuring Scan Queues

A Batch Application Process can be configured to route documents out of one or multiple Document Imaging scan queues. To configure scan queues for a Batch Application Process:

1. In the **Batch Application Process** dialog box, click **Scan Queues**. The **Scan Queue Assignment - [Batch Application Process Name]** dialog box is displayed.
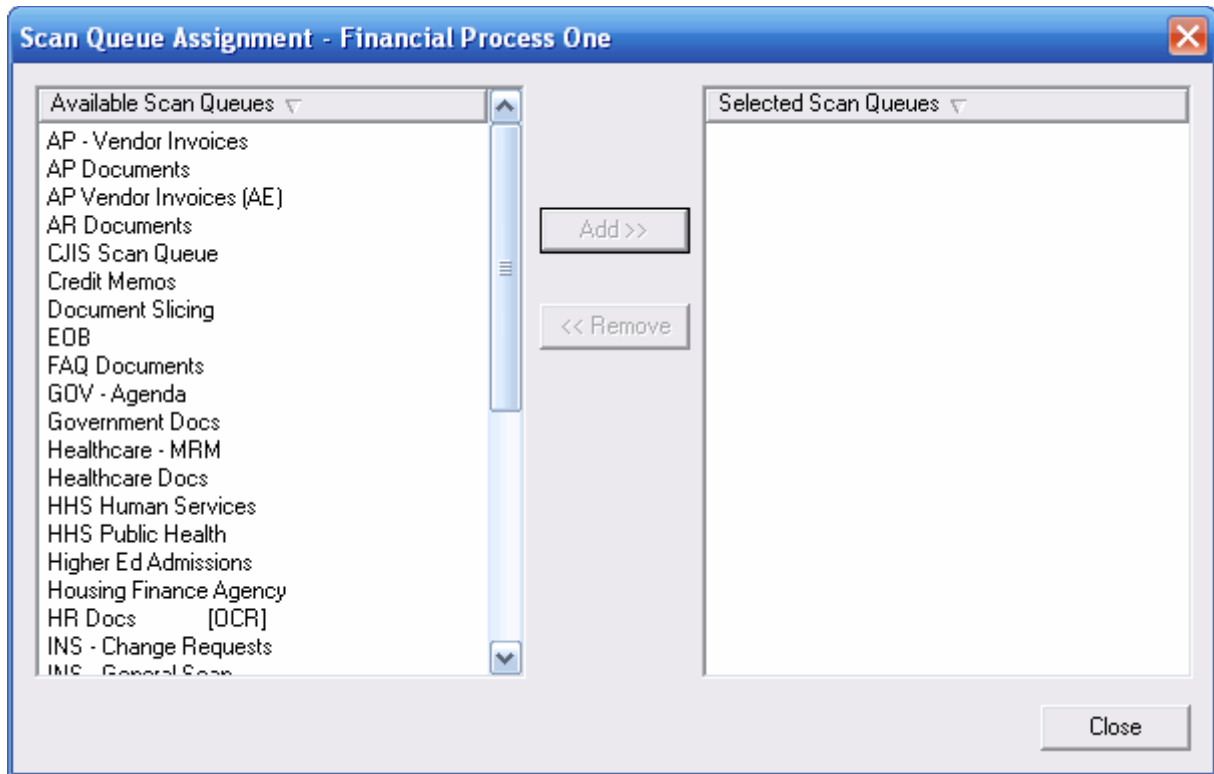
2. Select the scan queues that will belong to the Batch Application Process from the **Available Scan Queues** list. Double-click the scan queue or click the **Add>>** button to add the scan queue to the **Selected Scan Queues** list. Any time a batch is committed from any of the added queues, a new batch is added to the Batch Application queue.

Tip: Click **Available Scan Queues** to sort the list alphabetically.

3. When finished, click the **Close** button to exit the dialog box.

Configuring Process Queues

A Batch Application Process can be configured to route documents out of one or more processing module queues. To configure queues for a Batch Application Process:

1. In the **Batch Application Process** dialog box, click **Process Queues**. The **Process Queue Assignment - [Batch Application Process Name]** dialog box is displayed.
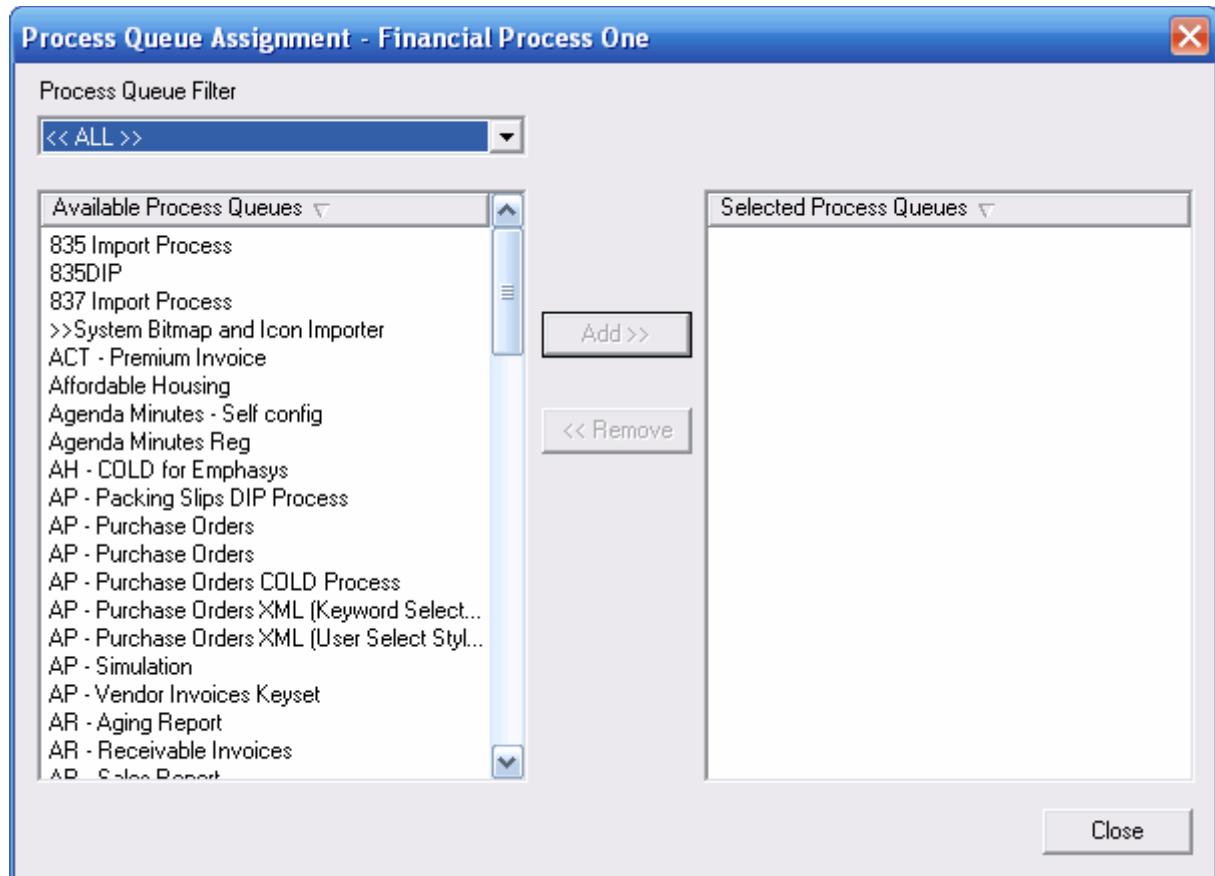
2. To filter the **Available Process Queues** list by available process types (all COLD processes, all DIP processes, etc.), select the appropriate process type from the **Process Queue Filter** drop-down list. All processes that are licensed and have queues configured will be displayed in the list.

3. Select the process queues that will belong to the Batch Application Process from the **Available Process Queues** list. Double-click the process queue or click the **Add>>** button to add the process queue to the **Selected Process Queues** list. Any time a batch is committed from any of the added queues, a new batch is added to the Batch Application queue.

Tip: Click **Available Process Queues** to sort the list alphabetically.

4. When finished, click the **Close** button to exit the dialog box.

Configure a Scan Queue to be SAP compatible

SAP scan queues are created via a processing option available to any OnBase scan queue. To create this link between OnBase and SAP:

1. In the Configuration module, select **Import | Scan Queues** to display the **Scan Queue Configuration** dialog box.
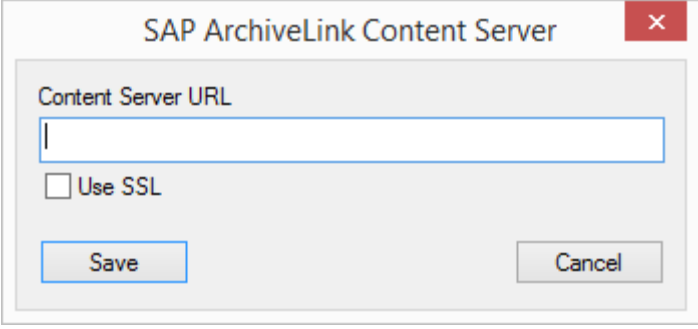
Note: To link an already existing scan queue to SAP, skip to step 7. If you want to create a new scan queue to link to SAP, continue to the next step.

---

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

   The **Copy Scan Queue Settings** dialog box is displayed.

3. If you want to copy the settings from an existing scan queue, select one from the drop-down list and click **OK**, otherwise click **Cancel**.

4. Select a disk group from the drop-down list and click **Save**.

5. Assign the new scan queue to the user groups you want to have access to it by selecting one or more from the **Available User Groups** list and clicking **Add**.

6. Click **Close** to finish creating the scan queue and return to the **Scan Queue Configuration** dialog box.

7. Select the scan queue you want to link to SAP and click **SAP ArchiveLink**.

   The **Create Content Server Alias** dialog box is displayed.

8. Enter a descriptive name.

9. Click **Create**. The **SAP ArchiveLink Content Server** dialog box is displayed.

10. Enter the name for the **Content Server URL**.

Note: The URL entered here does not require a http:// prefix.

This is the name of the machine where the content server is installed with the virtual directory appended. For example, in a typical installation the virtual directory would be named archivelink. The content server URL entered here would then be **machinename/ archivelink**.

11. If you want to use an HTTPS binding, select the **Use SSL** check box.

12. Click **Save** to return to the **Create Content Server Alias** dialog box.

13. Click **Close** to return to the **Scan Queue Configuration** dialog box.

14. Select the scan queue you want to link to SAP and click **Process Options**.

15. Select the **Integrations** tab.

16. Select the **SAP ArchiveLink Integration** option in the **SAP Options** group.

17. Select the appropriate ArchiveLink server from the **Server** drop-down list. All servers configured in the **Create Content Server Alias** dialog box are displayed in this drop-down.

18. Select the **Use 'Awaiting Transfer to Host' Queue** option if you want to use the queue for bringing in documents from a scan queue using early archival.

    If this scan queue will be used for late storage with bar codes, do not select this option.

19. Click **Save**.

Typically, you would create a bar code process that uses the system keyword **SAP ArchiveLink Barcode** and assign it to the scan queue(s). However, you can also assign the keyword to one or more document types, and then assign those document types to the scan queues. Documents can be swept and manually indexed into one of those document types, and a value can be manually assigned to the bar code keyword. This value can also be processed automatically via OnBase Bar Code integrations.

When a scan queue batch is committed, its bar code information will first be sent to the OnBase ArchiveLink Server as XML data. When this commit succeeds, a window will appear that gives feedback to the linking process. Any errors with the reception of the linking request will be displayed in the status panel. The ArchiveLink Server will not process this request immediately, but rather it will wait and perform batch processing at configured intervals.

Administrators can view any bar code errors on the bar code administration page. See Troubleshooting on page 24 for more information.

Configuring the OLE Application in SAP

In order for your SAP system to use the Unity Client for use with SAP ArchiveLink, DocPop, or UnityPop to view or import documents, SAP must first be properly configured to use an OLE frontend. This includes:

Define an OLE Application

In order to enable Unity Client for use with SAP ArchiveLink integration with the SAP GUI, the application must be referenced within SAP.

1. Navigate to the **SOLE** transaction. The following page is displayed, which lists defined OLE applications.

OLE application	CLSID	Check auth.
20CONN	{5645CBDD-BEBD-4182-BF07-BFF1EA62AC7B}	☐
ALVIEWER	{30446849-11E3-11D0-9D4E-0020AFC0E4C0}	☐
ALVIEWER.APP	{30446849-11E3-11D0-9D4E-0020AFC0E4C0}	☐
APPROACH.APPLICATION	{00028701-0000-0000-C000-000000000046}	☐
AUTOVUE.APPLICATION	{63A20B20-2357-101D-909B-0000C02E4A4A}	☐
AUTOVUE.DOCUMENT	{71FE6890-6F6E-11CE-9EF9-0000C074797F}	☐
BHONBASE	{5645CBDD-BEBD-4182-BF07-BFF1EA62AC7B}	☐
DEVRSVW	{7494DE15-0050-4BDC-9151-9594C9342160}	☐
DL	{5645CBDD-BEBD-4182-BF07-BFF1EA62AC7B}	☐
DSPCALC2.APPLICATION	{00020469-0000-0000-C000-000000000046}	☐
EXCEL.APPLICATION	Excel.Application	☐
EXCEL.CHART	Excel.Chart	☐
EXCEL.SHEET	Excel.Sheet	☐
GRAPH.APPLICATION	{000208EC-0000-0000-C000-000000000046}	☐
INGNVW	{5645CBDD-BEBD-4182-BF07-BFF1EA62AC7B}	☐
INTERNETEXPLORER.APPLICATION	{0002DF01-0000-0000-C000-000000000046}	☐
IXOSVIEW.APP	{3C3AB5E0-94C0-101B-9711-0000C0A49E6F}	☐
JAB:SUNW.DEMO.JUGGLER.JUGGLER	sunw.demo.juggler.Juggler	☐
LOTUS1-2-3	{29130007-2EED-1069-BF5D-00DD011186B7}	☐
LOTUS123.WORKBOOK	{29130007-2EED-1069-BF5D-00DD011186B7}	☐
MERLIN.APPLICATION	{63D4DA31-D3DF-11CE-9C22-0020AF0E9FB5}	☐

2. Select the **Display/Change** button or press **Ctrl + F1** to select the change mode.   The following message is displayed.
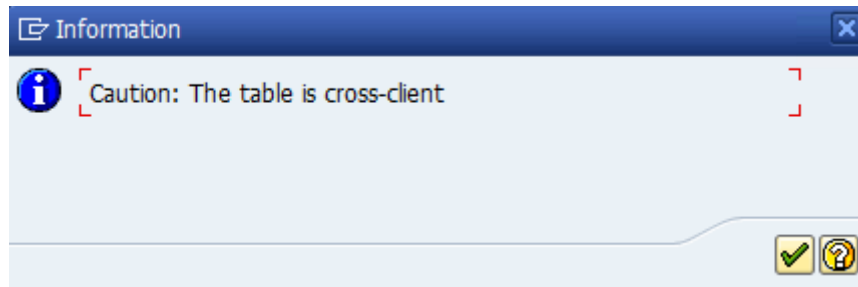
Note: This message means that any changes made to the configuration for this transaction will create a transport. This will allow your changes to be made to other clients via transports. New configuration will not be needed. Contact your Basis Administrator for more information.

3. Click **Continue**.
4. Click **New Entries**.

5. The details for OLE applications page is displayed.
   In the **OLE application** field, enter a useful name for the application, such as **SAPUNITY**.

6. In the **CLSID** field, enter **{7494DE15-0050-4BDC-9151-9594C9342160}**.
7. In the **CLSID LibType** field, enter **{9A7657D0-9955-48C5-A5B8-DB5FA34EB878}**.
8. In the **OLE object name** field, enter **SAPCONTROL2**.
9. Click **Save** or **Ctrl + S** to save the defined application.

Create an Application Protocol

At this stage in configuration, you now have an application defined within SAP. In order to implement it, you need to define a SAP protocol associated with the application.

1. Navigate to the **OAA3** transaction.
2. Click on the **New protocol** button or press **F5** to create a protocol.

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3. Enter the **Protocol** name, **Version** and **Description**. The OnBase ArchiveLink Server is version **0047** compatible. All other fields remain at the discretion of the administrator.

Note: The OnBase ArchiveLink Server is also compatible with the version 0045 ArchiveLink interface. However, to enable version 0045 support, the ArchiveLink web.config file must be modified. In the `<appSettings>` section, the value of the `ArchiveLinkVersion` key must be changed from the default `0047` to `0045`.

4. Click the **Save** button.

5. Double-click on the newly created protocol from the list. The **ArchiveLink Protocols: Overview of Protocol** screen is displayed. From this menu you can add functionality to the protocol give it access to maintain other protocols within OnBase.

6. Click the **Application maintenance** button.

7. Click the **Create** button or press **F5** to create a new application. A dialog box is displayed for you to enter the application name.
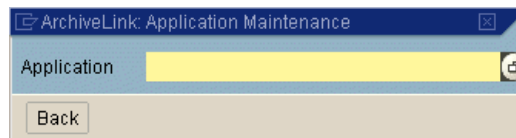
Note: The application name must be 12 characters or less and cannot contain spaces.

8. Click **Continue**.

Configure the Application Protocol

To configure the OLE Application protocol in SAP:

1. Navigate to the **OAA3** transaction.
2. Double-click on the application protocol. A list of functions is displayed.

   There are two functions that require coding:

   - The **Display Stored Document** function must be configured to display documents using the Unity Client for use with SAP ArchiveLink, UnityPop, or DocPop.
   - The **Archive from Frontend** function must be configured to save a document in OnBase via the Unity Client for use with SAP ArchiveLink.
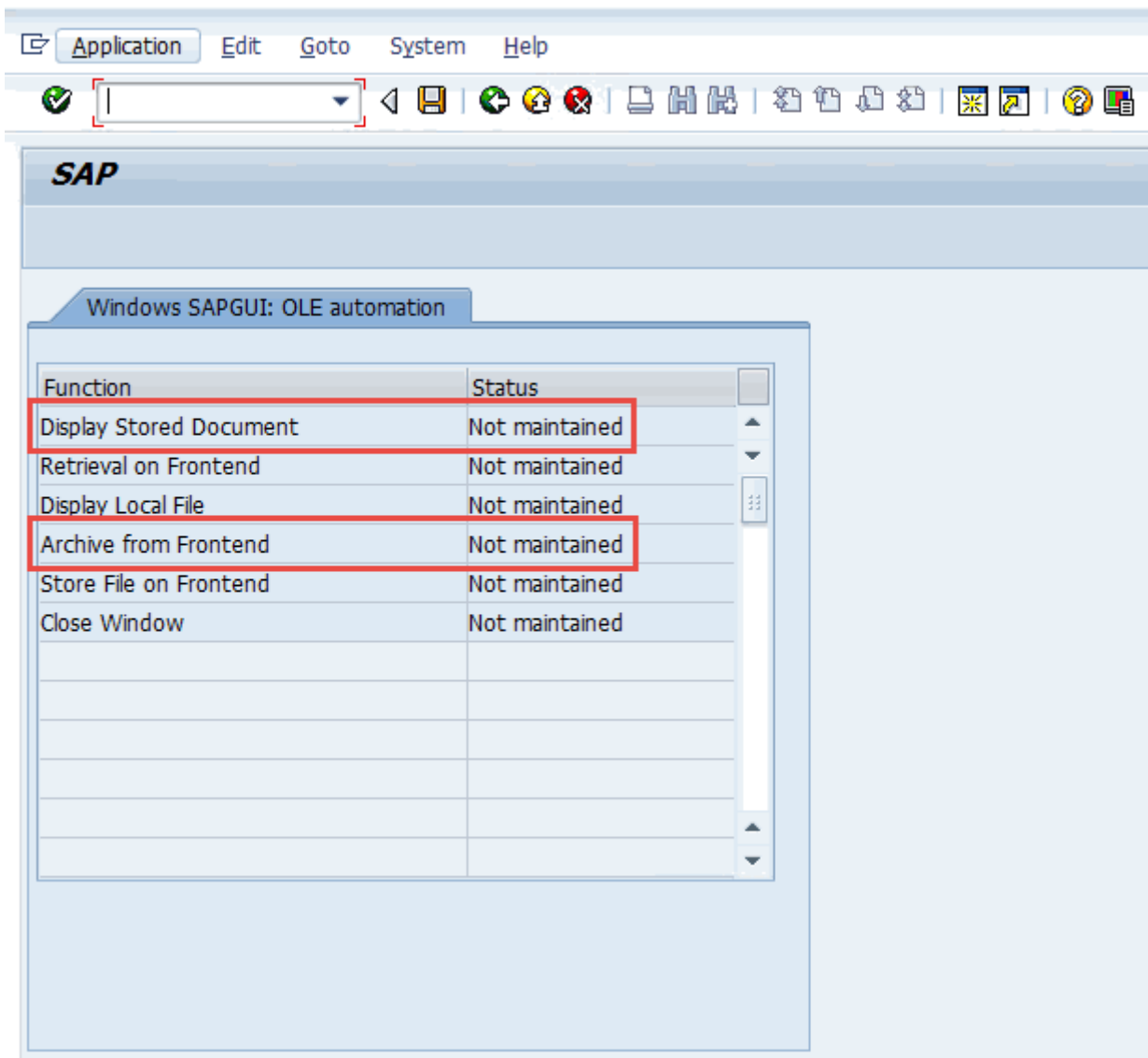
3. Double-click the **Display Stored Document** function to configure its commands.

4. In the **Application** field, enter the **OLE application** name that was created on the SOLE access screen. For example, **SAPUNITY**.

5. In the first command line, enter **DisplayDocument @AID,@DID**. There is no space between **@AID** and **@DID**. Verify that the **M** option is selected next to the command.

    Recall that **M** = Method, **S** = Set, and **G** = Get. These settings are used to signify the code's function. Altogether, this command sends a **DisplayDocument** call to the Unity Client for use with SAP ArchiveLink, DocPop, or UnityPop to display the selected document. The **@AID** parameter stores the content repository ID while the **@DID** represents the SAP document ID.

6. In the second command line, enter **@EID=ErrorCode** and select **G**. This command is to handle any errors.

7. Click **Back** when finished to return to the list of functions. Note that the **Status** of the **Display Stored Document** function is now **Maintained**.

8. Double-click the **Archive from Frontend** function to configure its commands.

9. In the **Application** field, enter the **OLE application** name that was created in the SOLE access screen. In the previous example, **SAPUNITY** was used.

10. In the first command line, enter **StoreDocument @AID.** Verify that **M** is selected next to the command.

11. In the second command line, enter **@EID=ErrorCode** and select **G**.

12. In the third command line, enter **@DID=LastSAPDocumentID** and select **G.**

    These commands call the Unity Client for use with SAP ArchiveLink to archive a document into OnBase.

13. Click **Back** when finished to return to the list of functions.

14. Click the **Save** button or press **Ctrl + S** to save the changes to functions.

15. Next, the SAP document classes must be attached to the protocol functions. Click the **Back** button twice to navigate to the **ArchiveLink Protocols: Overview of Protocol** screen.
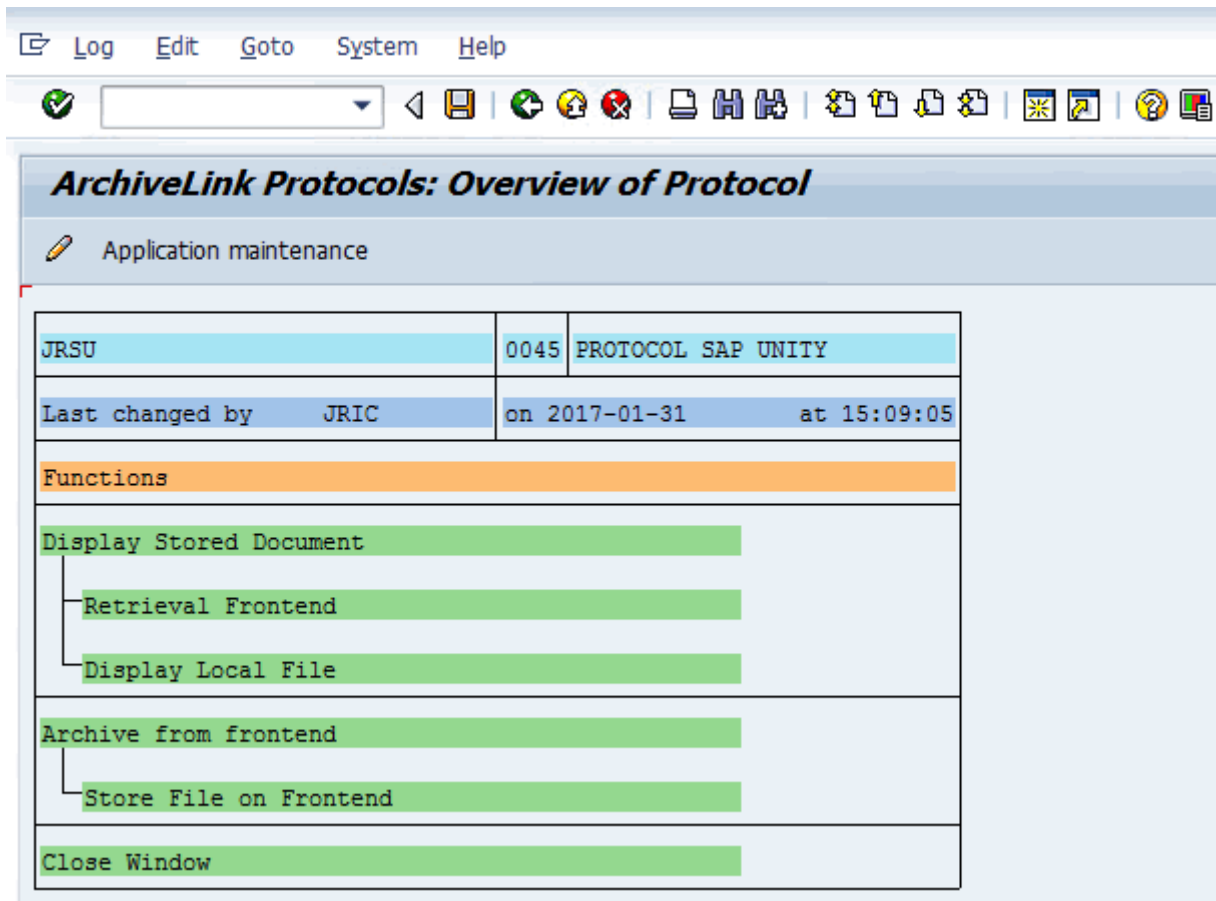
16. Depending on whether you want to use DocPop, UnityPop, or the Unity Client for use with SAP ArchiveLink, you must complete different configuration steps.

- To configure the application to use the Unity Client for use with SAP ArchiveLink, follow the steps in Configuring the Protocol to Use the Unity Client for use with SAP ArchiveLink on page 87.
- To configure the application to use DocPop or UnityPop for retrieval, follow the steps in Configuring the Protocol to Use DocPop or UnityPop for Retrieval on page 91.

Configuring the Protocol to Use the Unity Client for use with SAP ArchiveLink

1. Navigate to the **OAA3** transaction.
2. Double-click on the application protocol. A list of functions is displayed.

3. Double-click on the **Display Stored Document** function.
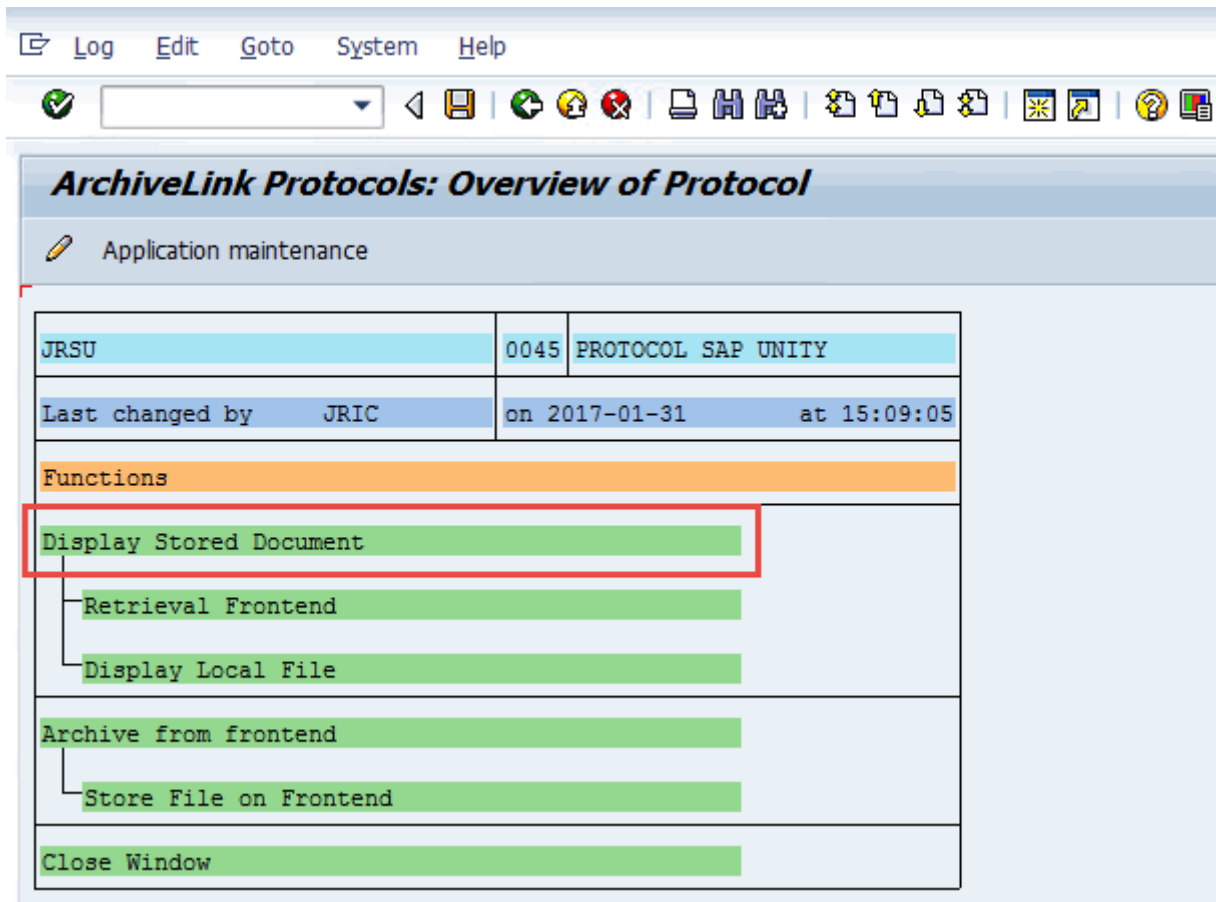
4. The list of document classes associated with the **Display Stored Document** function is displayed.

   Select a document class that you want to be displayed using the Unity Client for use with SAP ArchiveLink and double-click it.

ArchiveLink Protocols: Overview of Protocol

Function: Display Stored Document

Document classes

*	Not maintained explicitly (standard)
123	Not maintained explicitly (standard)
ALF	Not maintained explicitly (standard)
BIN	Not maintained explicitly (standard)
BMP	Not maintained explicitly (standard)
CGM	Not maintained explicitly (standard)
CSS	Not maintained explicitly (standard)
DOC	Not maintained explicitly (standard)
DOCX	Not maintained explicitly (standard)
DOT	Not maintained explicitly (standard)
FAX	Not maintained explicitly (standard)
GIF	Not maintained explicitly (standard)
HTM	Not maintained explicitly (standard)
HTML	Not maintained explicitly (standard)
HTML-WK	Not maintained explicitly (standard)
HTML-WP	Not maintained explicitly (standard)
JPG	Not maintained explicitly (standard)

5. In the **CommunicationType** field, select **OPEN**.

6. In the **Application** field, enter the name of the application.
7. Click **Continue**. You are then returned to the **ArchiveLink Protocols: Overview of Protocols** screen.
8. Click the **Save** button or press **Ctrl + S** to save your changes.
9. Double-click the **Archive from frontend** function.

    The list of document classes associated with the **Display Stored Document** function is displayed.
10. Select the document class that you want to be archived using the Unity Client for use with SAP ArchiveLink and double-click it.
11. In the **CommunicationType** field, select **OPEN**. **OLE** is displayed under the field.

12. In the **Application** field, enter the name of the application.
13. Click **Continue**. You are then returned to the **ArchiveLink Protocols: Overview of Protocols** screen.
14. Click the **Save** button or press **Ctrl + S** to save your changes.

Configure SAP to Use DocPop or UnityPop

In order to use DocPop or UnityPop to retrieve documents, a few extra configuration steps must completed.

1. Configure the content repository as described in Configuring the Repository on page 57.
2. Configure the **Display Stored Document** protocol as described in Configuring the Protocol to Use DocPop or UnityPop for Retrieval on page 91.
3. Configure default display setting in SAP as described in Configuring SAP to Use Default Internet Browser for DocPop or UnityPop on page 94.

Note: If multiple documents are open in DocPop or UnityPop at the same time, they share a concurrent license.

Configuring the Protocol to Use DocPop or UnityPop for Retrieval

The following must be configured for the ArchiveLink Protocol to use DocPop or UnityPop:

1. Navigate to the **OAA3** transaction.
2. Double-click the application protocol. A list of functions is displayed.

3. Double-click the **Display Stored Document** function.
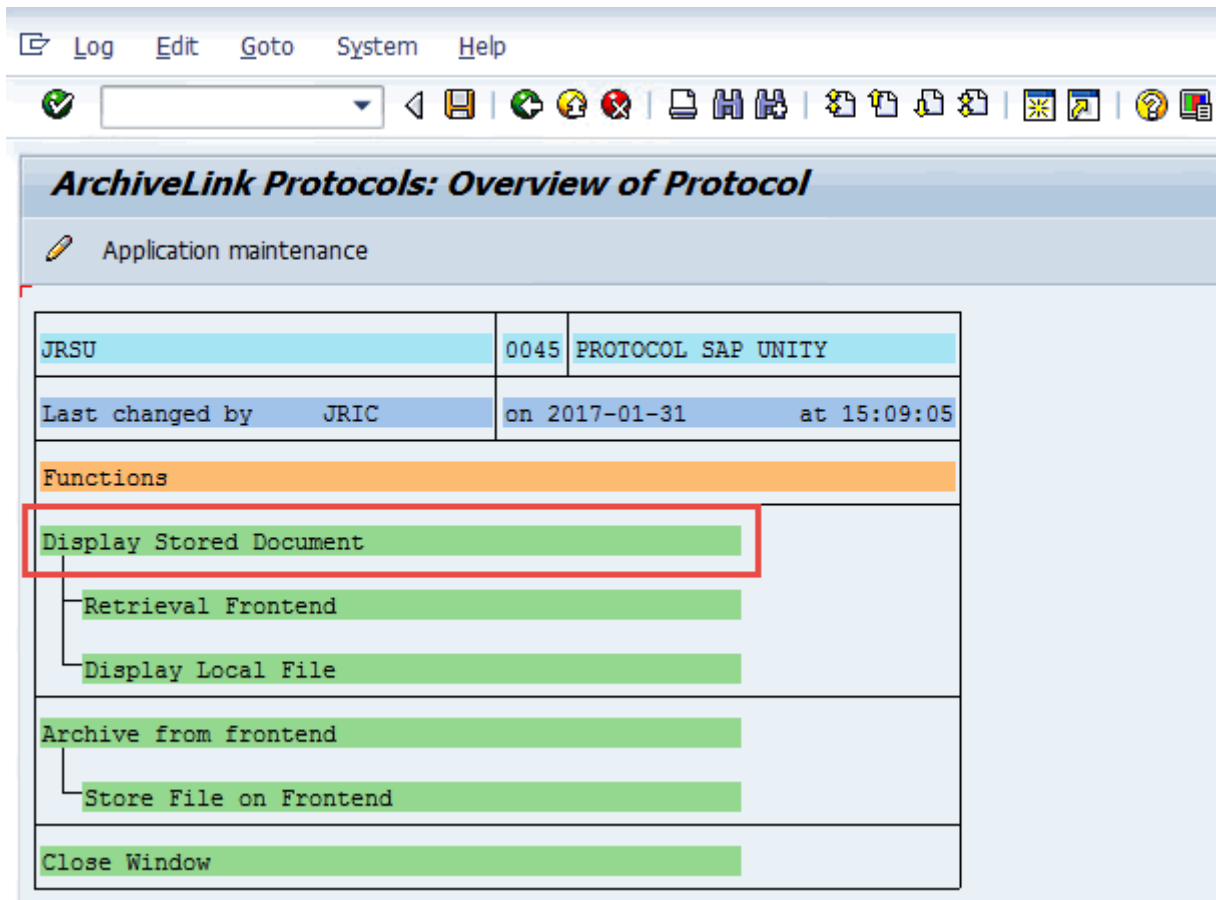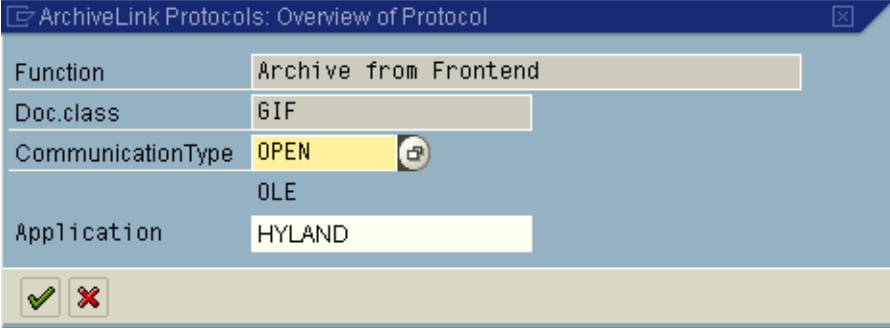
4. Select the document class that you want to be displayed using the DocPop or UnityPop and double-click it.
5. **Standard Communication** should be the **CommunicationType** and the field should be left blank.
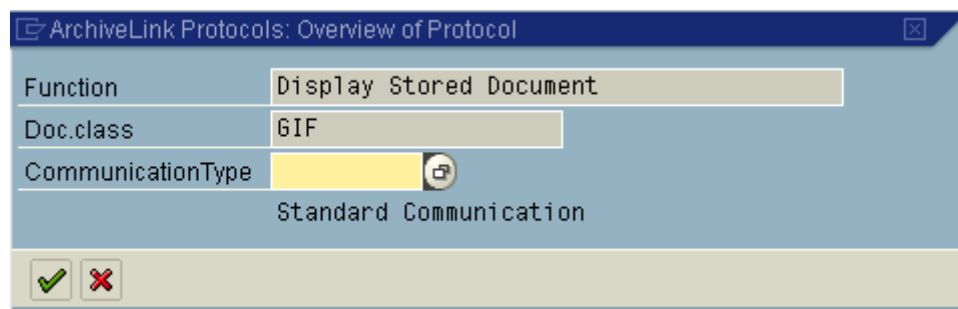
6. Click **Continue**.
7. Click the **Save** button or press **Ctrl + S**.
8. Double-click the **Archive from frontend** function from the **ArchiveLink Protocols: Overview of Protocols** screen.

9. Select **OPEN – OLE** as the **Communication**Type.
10. In the **Application** field, enter the name of the application that was created in the SOLE access screen.
11. Click the **Continue** button.
12. Click the **Save** button or press **Ctrl + S** to save the changes to the protocol.

Configuring SAP to Use Default Internet Browser for DocPop or UnityPop

In order to use DocPop or UnityPop, the following steps must be completed:

1. Navigate to transaction code **OAG4**.
   The **ArchiveLink: Settings for Hit List, Display and Storage** screen is displayed.

2. Select the **Call Internet Browser** option in the **Display Settings** options under **Windows Viewer Settings**.
3. Click **Save**.

Configuring the SAP Content Repository for Use with DocPop or UnityPop

The content repository must be configured to use the protocol you configured for use with DocPop or UnityPop when configuring the content repository as described in Configuring the Repository on page 57.

Configuring the Unity Client for use with SAP ArchiveLink

The Unity Client for use with SAP ArchiveLink can be configured to best suit the needs of users.

Optional configuration of the Unity Client for use with SAP ArchiveLink includes:

Configuring the Unity Client for use with SAP ArchiveLink for IdP Authentication

For information on how to configure the Unity Client for use with SAP ArchiveLink for IdP Authentication, see the **Identity and Access Management** module reference guide.

Selecting All Documents by Default in the Archive Client

In the Archive Client function of the Unity Client for use with SAP ArchiveLink, you must select each document in a batch that you want to archive. However, if you want all documents in the batch to be selected by default so that users simply deselect the documents they don't want to import, you can change this default behavior.

To configure whether all documents are selected by default when using the Archive Client function:

1. If the Unity Client for use with SAP ArchiveLink is currently running, close any open windows, right-click the OnBase icon in the system tray and select **Exit OnBase**.
2. Navigate to the install location of Unity Client for use with SAP ArchiveLink.

3. Open the **obsapunity.exe.config** file.

    The **ArchiveClientSelectAll** key within the **<appSettings>** element controls whether all documents in a batch are selected by default.

    ```
    <appSettings>
        <add key="ArchiveClientSelectAll" value="False"/>
        <add key="IsMassArchiveVisible" value="True"/>
        <add key="IsSweepVisible" value="True"/>
        <add key="IsImportFileVisible" value="True"/>
        <add key="IsArchiveClientVisible" value="True"/>
        <add key="IsBrowseVisible" value="True"/>
    </appSettings>
    </configuration>
    ```

4. The default value of the **ArchiveClientSelectAll** key is **False**, meaning documents are not selected by default. Change the value to **True** for all documents in a batch to be selected by default.

    ```
    <appSettings>
        <add key="ArchiveClientSelectAll" value="True"/>
        <add key="IsMassArchiveVisible" value="True"/>
        <add key="IsSweepVisible" value="True"/>
        <add key="IsImportFileVisible" value="True"/>
        <add key="IsArchiveClientVisible" value="True"/>
        <add key="IsBrowseVisible" value="True"/>
    </appSettings>
    </configuration>
    ```

5. Save and close the **obsapunity.exe.config** file.

Hiding Archive Functions

If you don't want users to have access to certain functions of the Unity Client for use with SAP ArchiveLink, you can disable them. This is done by hiding the function's button in the **Integration Tools** ribbon. For example, if you only want users to link documents already in OnBase to SAP and not other files, you could hide the **Sweep** and **Import File** buttons, preventing access to those functions.

To configure which archive functions are hidden:

1. If the Unity Client for use with SAP ArchiveLink is currently running, close any open windows, right-click the OnBase icon in the system tray and select **Exit OnBase**.
2. Navigate to the install location of Unity Client for use with SAP ArchiveLink.

3. Open the **obsapunity.exe.config** file.

   The keys which control the visibility of archive functions are contained within the **<appSettings>** element.

```
<appSettings>
    <add key="ArchiveClientSelectAll" value="False"/>
    <add key="IsMassArchiveVisible" value="True"/>
    <add key="IsSweepVisible" value="True"/>
    <add key="IsImportFileVisible" value="True"/>
    <add key="IsArchiveClientVisible" value="True"/>
    <add key="IsBrowseVisible" value="True"/>
</appSettings>
</configuration>
```

4. By default, all archive functions are visible and the values of their respective keys are set to **True**. Change the value of the keys to **False** to hide their respective functions in the SAP Archive Client.

   For the example outlined above, where the **Sweep** and **Import File** functions need to be hidden, **<appSettings>** should be modified to the following:

```
<appSettings>
    <add key="ArchiveClientSelectAll" value="False"/>
    <add key="IsMassArchiveVisible" value="True"/>
    <add key="IsSweepVisible" value="False"/>
    <add key="IsImportFileVisible" value="False"/>
    <add key="IsArchiveClientVisible" value="True"/>
    <add key="IsBrowseVisible" value="True"/>
</appSettings>
</configuration>
```

5. Save and close the **obsapunity.exe.config** file.

System Interaction

The Connector for use with SAP ArchiveLink can integrate with other OnBase modules and features to enhance or supplement functionality. See the following topics:

Enterprise Integration Server

The Enterprise Integration Server is an optional component of an overall Connector for use with SAP ArchiveLink solution, which provides a way to seamlessly automate data exchanges between OnBase and SAP systems. This integration is done without costly custom programming.

Note: For more information on the Enterprise Integration Server, see the **Enterprise Integration Server** module reference guide or contact your OnBase solution provider.

To configure SAP for use with the Enterprise Integration Server:

1. In SAP, navigate to the **SALE** transaction.
2. Select **Basic Settings | Logical Systems | Define Logical System**.
3. Click **New Entries**.
4. Enter **Log.System** and **Name** values:
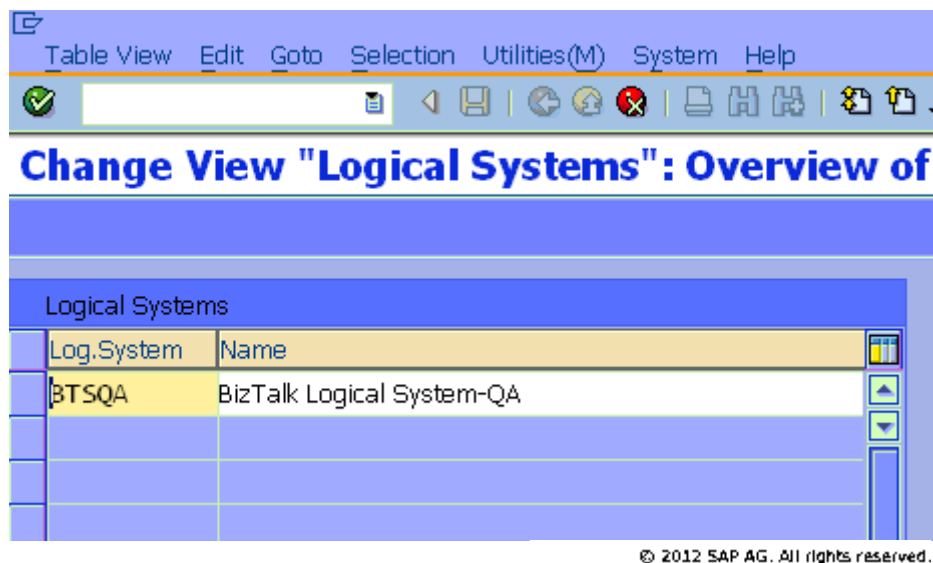
5. Press the Enter key.
6. Click **Save**.
7. Navigate to the **SM59** transaction.
8. Select TCP/IP connections.
9. Click **Create**.
10. The **RFC Destination** screen is displayed.
11. In the **Description 1** field, type a description for the RFC destination.
12. Select the **Technical Settings** tab.
13. In the **Activation Type** pane, select **Registered Server Program**.
14. In the **Registered Server Program** pane, type a unique name for the program in the **Program ID** field.
15. In the **Options** pane, type the host and service names in the **Host** and **service** fields, respectively.

16. Select the **MDMP & Unicode** tab.
17. In the Communication Type with Target System pane:
    - Select **Non-Unicode** if your SAP system is version 4.6C or lower.
    - Select **Unicode** if you SAP system is greater than version 4.6C.
18. Click **Save**.
19. Navigate to the **WE21** transaction.
20. Select **Transactional RFC**.
21. Click **Create**.
22. The **Ports in IDoc processing** screen is displayed.
23. In the **Port** field, type a name for the port.
24. In the **Description** field, type a description of the port.
25. In the **RFC destination** field, select the RFC destination you created in step 9.
26. Navigate to the **WE20** transaction.
27. Select **Partner Type LS** (Logical system).
28. Click **Create**.
29. The **Partner profiles** screen is displayed.
30. Type a **Partner No.** and **Partn. Type.**
31. Click **Create Outbound Parameter**:
32. The **Partner profiles: Outbound parameters** screen is displayed.
33. On the **Outbound Options** tab, specify a port in the **Receiver Port** field. This is the port you created in step 21.
34. Type **1** in the **Pack. Size** field.
35. In the **Output Mode** pane, select **Transfer IDoc immed.**
36. In the **IDoc Type** pane, type a basic type in the **Basic type** field.
37. Click **Save**.
38. Navigate to the **BD64** transaction**.**
39. Click **Switch between display and edit mode**:.
40. Click **Create model view**.
41. The **Create Model view** dialog box is displayed.
42. In the **Short text** field, type a short description.
43. In the **Technical name** field, type the technical name.
44. Click the check box.
45. Select the model view you just created.
46. Click **Add message type**.
47. In the **Model view** field, type the name of the model view you just created.
48. In the **Sender** field, type the name of the sender.

Note: This can be found by entering transaction code **OY25** under the appropriate client. This sender is also the sender configured in ArchiveLink Administration.

49. In the **Receiver** field, type the name of the Partner/Logical system you created in step 28.

50. In the **Message Type** field, type the message type.
51. Click the check box.
52. Click **Save**.
53. Select **Environment | Generate Partner Profiles**.
54. The **Generate Partner Profile** screen is displayed.
55. In the **Output Mode** pane, select **Transfer IDoc immediately**.
56. In the **Processing** pane, select **Trigger immediately**.
57. Click **Execute**:
58. The Profile Generation Confirmation is displayed:

Connection Verification

To verify that the Enterprise Integration Server is connected to SAP:

1. In SAP, navigate to the **SMGW** transaction.
2. Select from the top of the screen **Goto | Logged on Clients**.
3. The **Monitor for [server name]/Connections to Clients** screen is displayed.
4. In the **TP Name** column, locate an **External Client** connection named **BTSNTSvc**.
5. In the **TP Name** column, locate a **Registered Server** connection with the same name as the program ID you used in step 14 above.

OnBase Studio and Workflow

Configure the following to enhance the integration between SAP and your other OnBase modules:

Create or Modify SAP Content Servers in Studio

You can use the **SAP Content Servers** button in OnBase Studio to create a new content server, or to modify an existing content server.

Note: This button is only enabled if your system is licensed for Connector for use with SAP ArchiveLink.

1. Click on the **SAP Content Servers** button in the ribbon. The **SAP Content Servers** dialog is displayed.
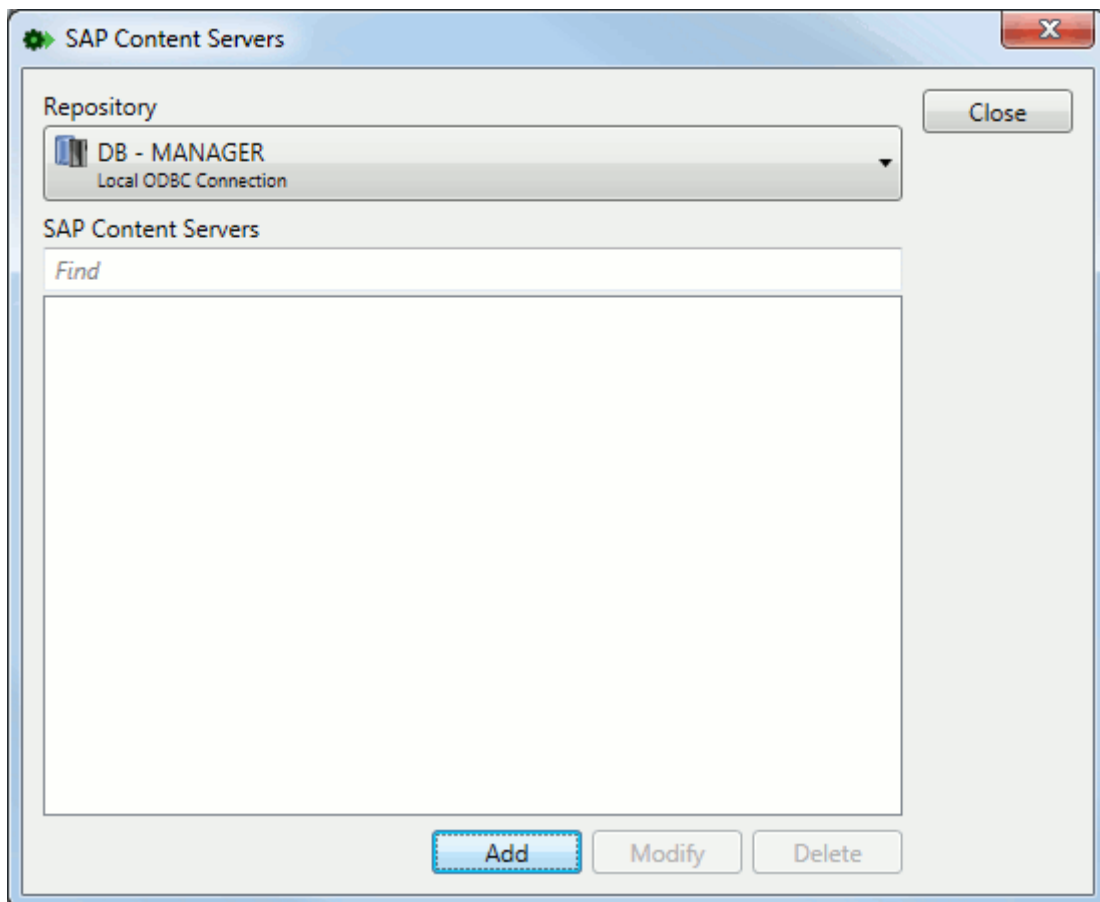
2. To create a new content server, select **Add**. To modify an existing content server, click **Modify**. In either case, the **SAP Content Server Configuration** dialog is displayed.
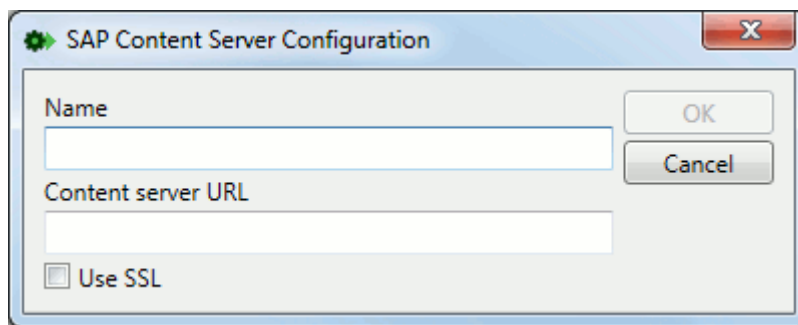
3. Enter a descriptive name for the content server in the **Name** field.

4. Enter the URL for the content server in the **Content server URL** field. This is the name of the machine where the content server is installed, with the virtual directory appended to the end of the machine name. In a typical installation, the virtual directory would be named archivelink.

   For example: machinename/archivelink

Note: You do not need to include the http:// prefix for this field.

5. Select the **Use SSL** check box if you want to use an HTTPS connection with this content server.

6. Click **OK**.

You can locate a specific, existing SAP content server by entering text that will identify the SAP content server in the **Find** field. The SAP content servers displayed will be narrowed down to the SAP content servers that contain the characters entered.

You can modify an existing SAP content server by selecting it and clicking **Modify**.

Configuring Web Services

Web services associated with Connector for use with SAP ArchiveLink are accessible through the **Call Web Service** Workflow action.

The following web services can be used to perform SAP related functions. The services in Connector for use with SAP ArchiveLink are capable of the following:

- Generate Complete Link
- Generate OnBase Link Using an Existing SAP GUID
- Generate OnBase Link (No GUID)
- Create Work Item
- Send Barcode Values
- Check Link Exists
- Get Links
- Create Incoming Invoice from Rendition (MIRO)

- Park Incoming Invoice from Rendition (MIRO)
- Create Vendor Invoice from Rendition (FB60)
- Create Internal Order from Rendition (KO01)
- Create Internal Order Parameterized (KO01)
- Get Incoming Invoice Details (MIRO)
- Get Incoming Invoice Details by Object ID (MIRO)
- Get Purchase Order Details
- Get Internal Order Details (KO01)
- Create Purchase Order from Rendition (ME21N)
- Create Purchase Order (ME21N)

Generate Complete Link

Generate Complete Link creates entries in both the SAP and OnBase link tables to connect an already existing SAP object to an already existing OnBase document.

To configure the service to generate a complete link:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ArchivingServices/GenericLinkingService.asmx?wsdl** where **<machinename>** is the name of the server and **<virtualdirectory>** is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. Select **GenerateCompleteLink** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.
8. Click **Apply**.

Service Specific Parameters

The following parameters are specific to the **GenerateCompleteLink** method.

Parameter	SAP Field
businessObjectID	OBJECT_ID in the TOA01 SAP table.
businessObjectType	SAP_OBJECT in the TOA01 SAP table.
descr	DESCR in the TOA01 SAP table.

Generate OnBase Link Using an Existing SAP GUID

Configuring the Workflow action to generate the OnBase link for an existing SAP GUID takes an existing SAP GUID that initially comes from the SAP TOA01 link table and creates the links in the OnBase link tables.

To configure the service to generate OnBase link for existing SAP GUIDs:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ArchivingServices/GenericLinkingService.asmx?wsdl** where **<machinename>** is the name of the server and **<virtualdirectory>** is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. Select **GenerateOBLinkForExisting** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.
8. Click **Apply**.

Service Specific Parameters

The following parameters are specific to the **GenerateOBLinkForExisting** method:

Parameter	Mapping
[out] storeDate	Map to the Keyword Type or Property that should contain the date that the OnBase document was stored in OnBase.
[out] repositoryName	Map to the Keyword Type or Property that should contain the Repository ID used in the ArchiveLink Content Repository,
[out] contentType	Map to the Keyword Type or Property that should contain the documentClass set in the ArchiveLink Content repository.

These parameters will be populated with information from OnBase and Connector for use with SAP ArchiveLink module when the call is invoked.

Generate OnBase Link (No GUID)

Configuring the Workflow action to generate the links in the OnBase link tables without any links in TOA01 table in SAP. Links will have to be created in SAP TOA01 at a later time for the OnBase document to be linked to an SAP Object.

To configure the service to generate OnBase link without GUIDs:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ArchivingServices/GenericLinkingService.asmx?wsdl** where **<machinename>** is the name of the server and **<virtualdirectory>** is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. Select **GenerateOBLink** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.
8. Click **Apply**.

Service Specific Parameters

The following parameters are specific to the **GenerateOBLink** method:

Parameter	Mapping
[out] storeDate	Map to the Keyword Type or Property that should contain the date that the OnBase document was stored in OnBase.
[out] repositoryName	Map to the Keyword Type or Property that should contain the Repository ID used in the ArchiveLink Content Repository,
[out] contentType	Map to the Keyword Type or Property that should contain the documentClass set in the ArchiveLink Content repository.

These parameters will be populated with information from OnBase and Connector for use with SAP ArchiveLink module when the call is invoked.

Create Work Item

Configuring the Workflow action to create a work item takes the place of using Early Storage with transaction code **OAWD**. These methods send the OnBase document into the SAP Workflow that the sapDocType is configured to use and directly puts it into the specified SAP user's inbox as a Work Item.

To configure the service to create a work item:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ArchivingServices/SAPWorkflowService.asmx?wsdl** where **<machinename>** is the name of the server and **<virtualdirectory>** is the configured virtual directory relative to the service.
3. Click **Retrieve**.

4. If you want to create a work item only, select **CreateWorkItem** from the **Method** drop-down list.

    If you want to create a work item and populate container data, select **CreateWorkItemWContainer** from the **Method** drop-down list.

5. Click **Mappings**.

6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.

7. Click **OK**.

8. Click **Apply**.

Service Specific Parameters

The following parameter is specific to the **CreateWorkItem** and **CreateWorkItemWContainer** methods:

Parameter	Mapping
processingOptions	If you want to send Auto-Name string data, set this to 1.
	Note: In order for Auto-Name string data when creating work items to be successful, additional configuration is necessary. See the Connector for use with SAP ArchiveLink documentation for additional information.
	If you want to use late storage, set this to 2.
	If you want to use both late storage and send Auto-Name string data, set this to 3.
	Setting this to 0 will default to early storage with no Auto-Name string.

The following parameters are specific to the **CreateWorkItemWContainer** method:

Parameter	Mapping
Names	This the Container Name in SAP.
Values	Map to the Keyword Type or Property that should contain the data that you want to populate the container.

Send Barcode Values

Configuring the Workflow action to send bar code values creates entries into SAP bar code tables. If the **barcodeProcessServer** element is set to **true** in the ArchiveLink web.config file, an entry will be added to SAP's external bar code table for late storage.

To configure the service to send a bar code value:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ArchivingServices/BarcodeServices.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. If you want to send the bar code value immediately, select **SendBarcodeImmediate** from the **Method** drop-down list.

   If you want to send bar code values as a batch, select **InsertBarcodeForProcessing** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.
8. Click **Apply**.

Service Specific Parameters

The following parameter is specific to the **SendBarcodeImmediate** and **InsertBarcodeForProcessing** methods:

Parameter	Mapping
barcode	This should be mapped to the **SAP ArchiveLink Barcode** Keyword Type.

The following parameter is specific to the **InsertBarcodeForProcessing** method:

Parameter	Mapping
batchnum	This should be mapped to the **>>Batch Number** Keyword Type.

Check Link Exists

This service is used to verify if links between an OnBase document and an SAP Object have been created in the OnBase hsi.sapdoccomponent and hsi.sapdocument tables. When the service is run, these tables are checked to see if any entries have already been created for the document. If a link exists in the tables, a value of **True** will be returned. **False** will be returned if no entries exist in the tables.

To configure the service to check for existing links:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.

2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ArchivingServices/GenericLinkingService.asmx?wsdl** where **<machinename>** is the name of the server and **<virtualdirectory>** is the configured virtual directory relative to the service.

3. Click **Retrieve**.

4. If you want to send the bar code value immediately, select **CheckLinkExists** from the **Method** drop-down list.

5. Click **Mappings**.

6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.

7. Click **OK**.

8. Click **Apply**.

Get Links

This service is used to verify if links between an OnBase document and an SAP Object have been created in the OnBase **sapdoccomponent** and **sapdocument** tables. When the service is run, these tables are checked to see if any entries have already been created for the document. If a link exists in the tables, the GUID for that link will be returned. If no links exist, the value of **null** is returned.

To configure the service to get links:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.

2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ArchivingServices/GenericLinkingService.asmx?wsdl** where **<machinename>** is the name of the server and **<virtualdirectory>** is the configured virtual directory relative to the service.

3. Click **Retrieve**.

4. If you want to send the bar code value immediately, select **GetLinks** from the **Method** drop-down list.

5. Click **Mappings**.

6. Map parameters appropriately. For more information about parameters, see Common Parameters on page 117.

7. Click **OK**.

8. Click **Apply**.

Create Incoming Invoice from Rendition (MIRO)

To configure the service to create incoming invoices from rendition (MIRO):

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ObjectGenerationServices/incominginvoiceservice.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. Select **CreateIncomingInvoiceRendition** from the **Method** drop-down list and click **Mappings**.
5. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
6. Click **OK**.
7. Click **Apply**.

Service Specific Parameters

The following parameters are specific to the **CreateIncomingInvoiceRendition** method.

Parameter	SAP Field
[out] errorResults : System.String[]	Captures SAP object creation errors. This can be mapped to a **Keyword** or a **Property**. **Note:** If there are multiple error lines, each line will be a separate Keyword Type value.

Park Incoming Invoice from Rendition (MIRO)

To configure the service to park incoming invoices from rendition (MIRO):

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ObjectGenerationServices/incominginvoiceservice.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. Select **ParkIncomingInvoiceRendition** from the **Method** drop-down list and click **Mappings**.
5. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
6. Click **OK**.
7. Click **Apply**.

The following parameters are specific to the **ParkIncomingInvoiceRendition** method.

Parameter	SAP Field
[out] errorResults : System.String[]	Captures SAP object creation errors. This can be mapped to a **Keyword** or a **Property**. **Note:** If there are multiple error lines, each line will be a separate Keyword Type value.

Create Vendor Invoice from Rendition (FB60)

To configure the service to create incoming invoices from rendition (FB60):

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ObjectGenerationServices/vendorinvoiceservice.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. With the **CreateVendorInvoiceRendition** method selected, click **Mappings**.
5. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
6. Click **OK**.
7. Click **Apply**.

Service Specific Parameters

The following parameters are specific to the **CreateVendorInvoiceRendition** method.

Parameter	SAP Field
[out] errorResults : System.String[]	Captures SAP object creation errors. This can be mapped to a **Keyword** or a **Property**. **Note:** If there are multiple error lines, each line will be a separate Keyword Type value.

Create Internal Order from Rendition (KO01)

To create an internal order from a rendition for KO01:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ObjectGenerationServices/InternalOrderService.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. Select **CreateInternalOrderRendition** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.
8. Click **Apply**.

Service Specific Parameters

The following parameters are specific to the **CreateInternalOrderRendition** method.

Parameter	SAP Field
[out] errorResults : System.String[]	Captures SAP object creation errors. This can be mapped to a **Keyword** or a **Property**.
	Note: If there are multiple error lines, each line will be a separate Keyword Type value.

Create Internal Order Parameterized (KO01)

To create an internal parameterized order from a rendition for KO01:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ObjectGenerationServices/InternalOrderService.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. Select **CreateInternalOrderParameterized** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.
8. Click **Apply**.

Service Specific Parameters

The following parameters are specific to the **CreateInternalOrderParameterized** method.

Parameter	SAP Field
controllingArea	Controlling Area
orderType	Order Type
projectName	Description
companyID	Company Code on Assignments tab
requestCCtr	Requesting CCtr on Assignments tab
currency	Currency on Control data tab
applicant	Applicant on General data tab
estimatedCost	Estimated costs on General data tab
SAPDate	Application date in the General data tab
businessArea	Business Area
[out] errorResults : System.String[]	Captures SAP object creation errors. This can be mapped to a **Keyword** or a **Property**. **Note:** If there are multiple error lines, each line will be a separate Keyword Type value.

Get Incoming Invoice Details (MIRO)

This service retrieves the object details from an SAP Internal Order via the SAP Invoice Number and the document year.

To configure the service to get incoming invoice details:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ObjectGenerationServices/incominginvoiceservice.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. If you want to send the bar code value immediately, select **GetIncomingInvoiceDetails** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.

8. Click **Apply**.

Service Specific Parameters

The following parameter is specific to the **GetIncomingInvoiceDetails** method:

Parameter	Mapping
invoiceDocNum	This is the invoice number of which are getting details.
fiscalYear	This is the fiscal year for the invoice of which you are getting details.

Note: Items pulled from tables such as "Header Data" are best if mapped to keywords in a SIKG. Items pulled from tables such as "Line Item Data" are best if mapped to keywords in a MIKG, due to the possibility of multiples of sets of data.

Get Incoming Invoice Details by Object ID (MIRO)

This service retrieves the object details from an SAP Internal Order via the SAP Object ID.

To configure the service to get incoming invoice details by object ID:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ObjectGenerationServices/incominginvoiceservice.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. If you want to send the bar code value immediately, select **GetIncomingInvoiceDetailsByOBJID** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.
8. Click **Apply**.

The following parameter is specific to the **GetIncomingInvoiceDetailsByOBJID** method:

Parameter	Mapping
objID	This is the full SAP Object ID you are getting the detail of.

Note: Items pulled from tables such as "Header Data" are best if mapped to keywords in a SIKG. Items pulled from tables such as "Line Item Data" are best if mapped to keywords in a MIKG, due to the possibility of multiples of sets of data.

Get Purchase Order Details

This service retrieves the object details from an SAP Purchase Order via the SAP Object ID.

To configure the service to get purchase order details by object ID:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ObjectGenerationServices/PurchaseOrderService.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. If you want to send the bar code value immediately, select **GetPurchaseOrderDetails** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.
8. Click **Apply**.

Service Specific Parameters

The following parameter is specific to the **GetPurchaseOrderDetails** method:

Parameter	Mapping
purchaseOrderNum	This is the full SAP Object ID you are getting the details of.

Note: Items pulled from tables such as "poHeader" are best if mapped to keywords in a SIKG. Items pulled from tables such as "items" are best if mapped to keywords in a MIKG, due to the possibility of multiples of sets of data.

Get Internal Order Details (KO01)

This service retrieves the object details from an SAP Internal Order via the SAP Object ID.

To configure the service to get internal order details:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ ObjectGenerationServices/InternalOrderService.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.
4. If you want to send the bar code value immediately, select **GetInternalOrderDetails** from the **Method** drop-down list.
5. Click **Mappings**.
6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.
7. Click **OK**.
8. Click **Apply**.

Service Specific Parameters

The following parameter is specific to the **GetInternalOrderDetails** method:

Parameter	Mapping
orderId	This is the full SAP Object ID you are getting details of.

Note: Items pulled from tables such as "Master Data" are best if mapped to keywords in a SIKG. Items pulled from tables such as "User Status" are best if mapped to keywords in a MIKG, due to the possibility of multiples of sets of data.

Create Purchase Order from Rendition (ME21N)

This service takes values from an OnBase document (i.e., entries from a pre-configured xml rendition) to create a Purchase Order within SAP. After the SAP Object is created, a link is made from the original OnBase document to the newly created SAP Object for retrieval within SAP.

To configure the service to create a purchase order from a rendition:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.
2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/ objectgenerationservices/PurchaseOrderService.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.
3. Click **Retrieve**.

4. If you want to send the bar code value immediately, select **CreatePurchaseOrderFromRendition** from the **Method** drop-down list.

5. Click **Mappings**.

6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.

7. Click **OK**.

8. Click **Apply**.

Service Specific Parameters

The following parameters are specific to the **CreatePurchaseOrderFromRendition** method.

Parameter	SAP Field
[out] errorResults : System.String[]	Captures SAP object creation errors. This can be mapped to a **Keyword** or a **Property**.
	Note: If there are multiple error lines, each line will be a separate Keyword Type value.

Create Purchase Order (ME21N)

This service creates a Purchase Order within SAP.

To configure the service to create a purchase order from a rendition:

1. In OnBase Workflow, create a **Call Web Service** action in the appropriate life cycle and queue.

2. In the **WSDL** field, enter **http://<machinename>/<virtualdirectory>/WebServices/objectgenerationservices/PurchaseOrderService.asmx?wsdl** where <machinename> is the name of the server and <virtualdirectory> is the configured virtual directory relative to the service.

3. Click **Retrieve**.

4. If you want to send the bar code value immediately, select **CreatePurchaseOrder** from the **Method** drop-down list.

5. Click **Mappings**.

6. Map parameters appropriately. For more information about parameters see Common Parameters on page 117.

7. Click **OK**.

8. Click **Apply**.

Service Specific Parameters

The following parameters are specific to the **CreatePurchaseOrder** method.

Parameter	SAP Field
[out] errorResults : System.String[]	Captures SAP object creation errors. This can be mapped to a **Keyword** or a **Property**. **Note:** If there are multiple error lines, each line will be a separate Keyword Type value.

Common Parameters

The following parameters are common to many of the available services:
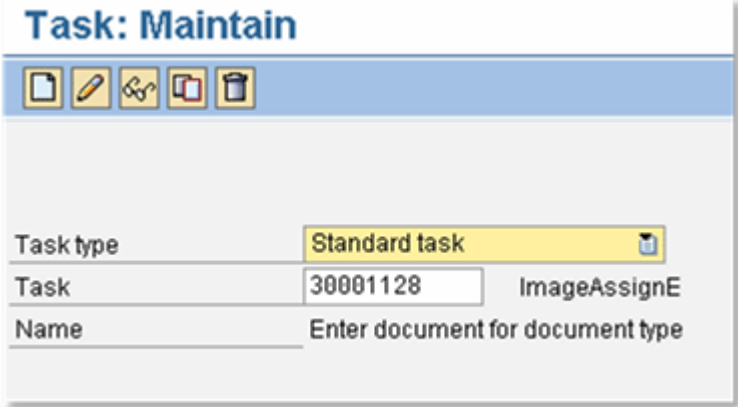
Parameter	Description
Return Value	Keyword designated to house SAP's return value.
documentID	OnBase document handle (This may be a keyword populated by an initial Workflow action).
senderID	SAP Logical System Number.
sapDocType	Document Type created in transaction OAC2.
renditionID	Value of 32 which is the file format number of XML in the OnBase Configuration module. You can also create a custom XML file format and use the id number of that format.
businessObjectID	SAP ID for an SAP object (ie:100019000001042008).
businessObjectType/ objectType	SAP object type (i.e., BKPF). **Note:** When parking a vendor invoice rendition (MIRO), the business object type must be BUS2081.
guid	SAP GUID located in SAP link table TOA01.
[out]	Information sent by SAP after link to SAP object is created.

Configuring SAP to Use OnBase Auto-Names for Work Items

In order for the **Use OnBase Auto-Name for Work Item Name** option in the **Create SAP Work Item** Workflow action to function correctly, some steps must be completed in the SAP system.

The first step to adding on OnBase auto-name for work item creation is to customize the standard task used for document entry. On most systems this should be standard task 30001128. To configure this:

1. Enter transaction code **PFTC** and find the appropriate standard task.
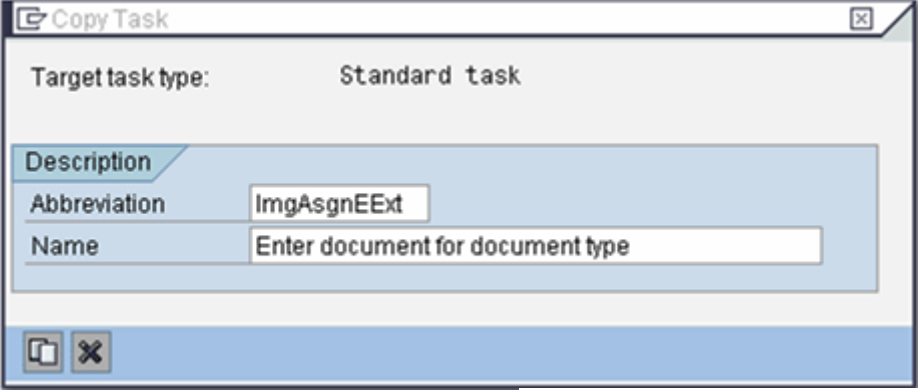
2. Enter the task and click **Copy**.

3. Enter in an appropriate name for the new version of the standard task.

4. Click **Copy task**. With the new task created, the document auto-name will need to be added to the container.

5. In the **Container** tab, click **Create Element** to create a new container element.

6. Enter the **DocumentName** in the **Element** field. This is the document auto-name element name.

7. Enter **DocumentName** in the **Name** field. This is the name text for the element.

8. Enter **Document Name** in the **Short Descript.** field. This is a short description of the element for the auto-name.

9. Enter **STRINGVAL** in the **ABAP Dict Data Type** field. This is the datatype of the element.

10. Select the **Properties** tab.

11. Select the **Import** check box.
12. Once the element is saved, find the newly created task from the **Task: Maintain** screen and click **Change**.
13. The **Work item text** field needs to have the following value: **DocName: &DOCUMENTNAME&**

Archive Messages and Attachments from Microsoft Outlook

A Microsoft Outlook folder used for auto-importing to send e-mail and attachments can be linked with an SAP Business Object. To configure a folder to send e-mail and attachments to SAP:

1. In the Outlook Inbox **Folder List** pane, create a new folder within the main system import folder.
2. Rename the folder to reflect its function. For example, if you will use it to import resumes for Emergency Room Nurses, you might name it **ERN - Resumes**.

Note: You can add multiple folders at multiple levels. The bottom level folder should be used for **Auto Import**.

Auto Import configurations are saved with the path to the folder and the folder name. This makes it possible to delete a folder you configured, and later add the folder, with all its configuration settings, back into the same place and name.

Caution: Auto Import settings are lost if the name of the folder is changed or removed after configuration.

3. Right-click the new folder and choose **Properties**. The **Properties** window displays.
4. Click the **OnBase** tab.
5. Select **Enable This Folder**.

There are three options that can be configured for every Auto Import folder: **Message Settings**, **Attachment Settings**, and **Folder Settings**. Folder Settings configures how that Auto Import Folder brings files into the system, while Message Settings and Attachment Settings configure the import process for the message and any attachments.

Configuring Message Settings

1. Click **Configure** in **Message Settings**. The **Message Configuration** dialog box displays.
2. Select the Document Type that will be assigned to all items placed into this folder from the **Document Type** drop-down list.

   When you select the Document Type, its Keyword Types are displayed in the **Keywords** section of the **Message Configuration** dialog box.
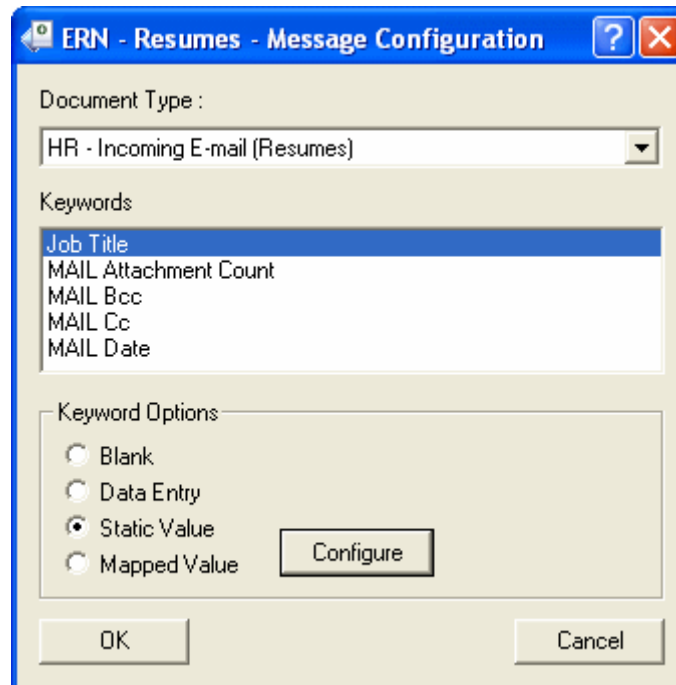
   All e-mail that is imported into the system using this Auto Import folder will contain these Keyword Types.
3. If desired, associate additional values and functions to certain Keyword Types. Select a Keyword Type from the **Keywords** list and then select an option from the **Keyword Options** list. (If the **Keyword Options** list is unavailable, the Keyword Type you selected cannot be changed.) Then click **Configure**.
4. Click **OK**.

Configuring Attachment Settings

1. Click **Configure** in **Attachment Settings**. The **Attachments Configuration** dialog box is displayed.
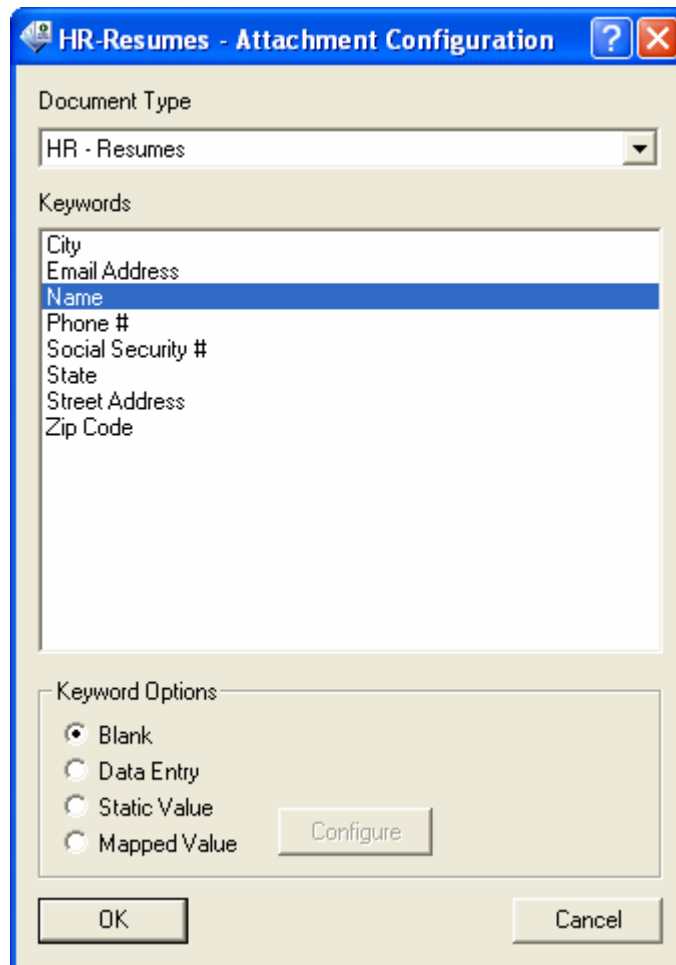
2. Select the Document Type that will be assigned to all items placed into this folder from the **Document Type** drop-down list. If you do not want to automatically import e-mail attachments, select **<None>**.

Note: OLE is considered a default file format (even though OLE applications can produce many different file formats). If you have a Document Type whose default file format is OLE, then you will be able to process e-mail messages with any type of OLE attachment. If the OLE file type is not currently available in your system, create a new file format in the Configuration module. In the **Viewer Type** field, select **OLE Server**.

When you select the Document Type, its Keyword Types are displayed in the **Keywords** section of the **Attachment Configuration** dialog box. All e-mail attachments imported into the system using this Auto Import folder will have these Keyword Types.

3. If desired, associate additional values and functions to certain Keyword Types. Configuring these options for e-mail attachments works the same as configuring these options for e-mail messages.
4. Click **OK** to return to the system tab.
5. Click **OK** to exit.

Repeat these procedures for any additional Auto Import folders you need. You must create at least one Auto Import folder for each Document Type that Connector for use with SAP ArchiveLink will automatically import e-mail messages and attachments into.

Configuring Folder Settings

1. Click **Configure** in **Folder Settings**. The **Folder Options** dialog box is displayed.
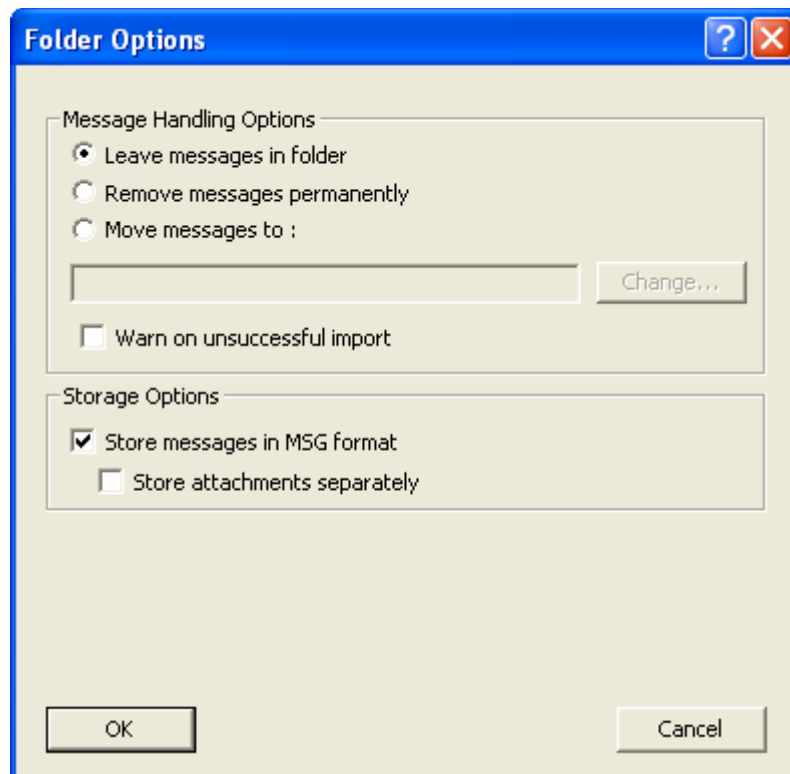
2. The **Message Handling Options** allow you to decide what happens to an e-mail message once it has been imported using this Auto Import Folder.

Option	Description
Leave messages in folder	When selected, e-mail messages that are imported into the system using this Auto Import Folder are left in the folder after being imported.
Remove messages permanently	When selected, e-mail message that are imported into the system using this Auto Import Folder are moved to the deleted items folder after being imported.

Option		Description
Move messages to:		When selected, e-mail messages that are imported into the system using this Auto Import Folder are moved to a different location.
	Change	**Note:** This button is only enabled if **Move messages to:** is selected.
		Click **Change** to select a new location for e-mail messages that have been imported into the system using this Auto Import Folder to be moved.

Select **Warn on unsuccessful import** to display a message notifying the user if a message was not imported correctly when it was moved to this Auto Import Folder.

3. **Storage Options** allow you to decide how an e-mail message imported using this Auto Import Folder is stored in the system.

   Messages can be stored in their native format (e.g. plain text, rich text, HTML) or in the Outlook native format (.MSG). If messages are stored in the MSG format, then the option to store attachments separately is enabled.

4. Click **OK** to save the configuration information for this Auto Import Folder and close the **Folder Options** dialog box.

To configure the auto folder for SAP:

1. Right-click on the folder that is configured for auto-importing and select **Properties**.
2. Select the **OnBase** tab.
3. Select the **Enable ArchiveLink** check box.
4. Select the appropriately configured **Scan Queue** for SAP ArchiveLink from the drop-down list.
5. Click **OK**.

Print Lists

In order to use print list with OnBase, there are few necessary configuration steps that must be completed.

- Configure a disk group for the print lists. See the **System Administration** documentation for more information concerning creating and configuring disk groups.
- Create a custom file format.
- Create a Document Type specifically for print lists.
- Create a repository specifically for print lists. See Setting Up a Content Repository within SAP on page 54 for more information.

Creating a Custom File Format

In the Configuration module:

1. Select **Document | File Formats**.
2. Enter **ALF** in the field and click **Create**.
3. Select the **Custom** option.
4. In the **MIME Type** field, enter **application/z-alf**.
5. In the **Default Extension** field, enter **ALF**.
6. Click **Save**.

Creating a Document Type

In the Configuration module:

1. Select **Document | Document Types**.
2. Enter **SAP Print Lists** in the field and click **Create**.
3. Select a **Document Type Group** from the drop-down list.
4. Select the **ALF** custom file format from the **Default File Format** drop-down list.
5. Select the disk group created for print lists.
6. Click **Save**.
7. Assign the appropriate user groups and click **Close**.

Information Lifecycle Management (ILM) Data Interface

The Information Lifecycle Management (ILM) enhances the SAP standard delivery with the ability to manage the lifecycle of live and archived data based on rules. SAP ILM uses ILM-specific, enhanced data archiving functions. The SAP Archivelink works with the ILM to apply policies and constraints in order to effectively work with OnBase. This places the focus on the actual data, ensuring that all policy requirements are met for documents stored in the OnBase Client.

In some situations, you may need to set legal hold constraints on SAP business documents, and thereafter propagates these constraints to the linked documents in OnBase ArchiveLink. If documents have been archived to OnBase prior to the start of the legal case, locate the document in SAP, set the legal hold using the SAP ILM Case Management (either manually or using E-Discovery), and then use SAP ArchiveLink to cascade the hold information to the appropriate archived documents in the OnBase Client.

Prerequisites

Before you can use the ILM with ArchiveLink, you must ensure that the following are installed and configured:

- **OnBase Configuration**. OnBase service users and keywords are created in the OnBase Configuration.
- **SAP.** ILM business functions and repositories are established in SAP.

- **SAP ArchiveLink Connector**. Links with the ILM system to cascade ILM data to archived documents in OnBase.
- **SAP ArchiveLink must be configured with ILM**. See your system administrator for more information.

Setting Keyword Types for ILM

ILM-specific keywords should be set up in OnBase prior to importing and archiving documents from SAP. The keyword fields for each document are updated when ILM events occur.

Keywords that relate to specific ILM events include:

- **SAP ILM Retention Active**. Indicates that an ILM document retention is active for this archived document.
- **SAP ILM Retention Date**. Indicates the start date of the ILM document retention.
- **SAP ILM Expiration Date**. Documents expire once the date specified in this field has been reached.
- **SAP ILM Destruction Date**. Documents cannot be deleted until after the date specified in this field.

- **SAP ILM Legal Hold Active**. Indicates that a legal hold is active against this document.
- **SAP ILM Legal Hold Case ID**. This is a system-generated ID that links the case to the document archived in OnBase.

Note: Keywords are configured in the OnBase Configuration module.

Sending ILM Data Constraints to Archived Documents in OnBase

The following diagram displays a simplified look at how ILM is used with SAP and SAP ArchiveLink to push ILM constraints to documents that have been archived in OnBase.
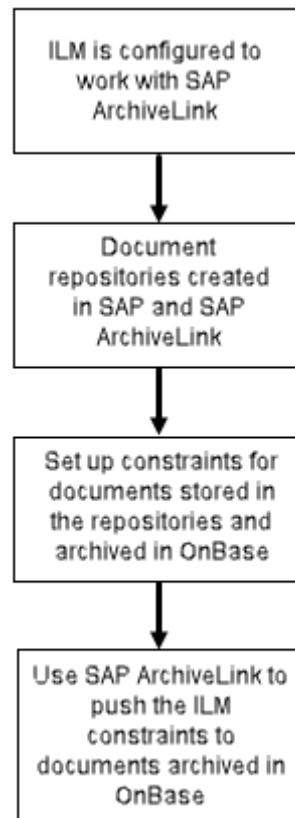
This process assumes that the following items are in place:

- Destinations have been configured from SAP to ILM.
- Documents requiring constraints have already been archived in OnBase, and the archived documents have a Document ID.
- The SAP Doc table has been populated.
- ILM policies (rule constraints) have been set up in SAP ILM Cockpit.

Connector for use with SAP ArchiveLink

User Guide

How you use the Connector for use with SAP ArchiveLink integration varies depending on your system configuration, when you bring OnBase documents into SAP, and where you pull those documents from.

OnBase documents linked in SAP can be viewed using the configured OLE application (i.e., Unity Client for use with SAP ArchiveLink, DocPop, or UnityPop). See Viewing Documents on page 132.

Early storage involves bringing a document into OnBase, linking it to SAP, and then performing necessary processing in SAP Workflow. See Bringing Documents into SAP Using Early Storage with Workflow on page 134, which describes how to use different Unity Client for use with SAP ArchiveLink functions to perform early storage, including:

- Mass Archival on page 134
- Sweep on page 136
- Import File on page 137

The final stage of early storage is described in Processing Documents in SAP Workflow on page 140.

Late storage involves linking an already existing OnBase document to an SAP business object. See Bringing Documents into SAP Using Late Storage on page 140, which describes methods for performing early storage with or without SAP bar codes, including:

- Archiving Documents with Bar Codes on page 140
- Archiving Document Batches without Bar Codes on page 140
- Archiving a Single Document without Bar Codes on page 143

See Other Features of the Unity Client for use with SAP ArchiveLink on page 145 for more about the Unity Client for use with SAP ArchiveLink, and Troubleshooting Layout on page 146 for how to use the Troubleshooting functions of the Unity Client for use with SAP ArchiveLink.

Viewing Documents

OnBase documents linked to SAP can be opened directly from SAP and launched in the OnBase application configured for the OLE Display Document function (that is, the Unity Client for use with SAP ArchiveLink, DocPop, or UnityPop).

To view a document, in SAP:

1. Navigate to the SAP transaction which contains a linked document you want to view. For example, transaction **FB03**.
2. Double-click on a document attached to the SAP business object.

3. If you are not already logged in to OnBase, you will be prompted to log in.

The document is displayed in the viewer window of the configured OnBase application. The following image shows a document displayed in the Unity Client for use with SAP ArchiveLink.

See the **Unity Client**, **DocPop**, or **UnityPop** documentation for details on the features of the document viewer window.

Bringing Documents into SAP Using Early Storage with Workflow

Early storage involves bringing a document into OnBase, linking it to SAP, and then performing necessary processing in SAP Workflow.

The basic steps to perform early storage include:

1. Scan documents into OnBase using a scan queue with the **SAP ArchiveLink Integration** and **Use 'Awaiting Transfer to Host' Queue** options set and commit the batch.
2. Bring documents into SAP system using any of the following Unity Client for use with SAP ArchiveLink functions:
   - Mass Archival on page 134
   - Sweep on page 136
   - Import File on page 137
3. Retrieve documents in SAP Workflow and create a corresponding business object. See Processing Documents in SAP Workflow on page 140.

Mass Archival

After scanning documents into OnBase and committing the batch to the **Awaiting Transfer to Host** queue, in SAP:

1. Navigate to the **OAWD** transaction.
2. Find the appropriate SAP document type that you want to store the documents as and that is configured for the **Storing for subsequent entry** action.
3. Double-click on the document type.

   The **Storing for subsequent entry** dialog box is displayed.
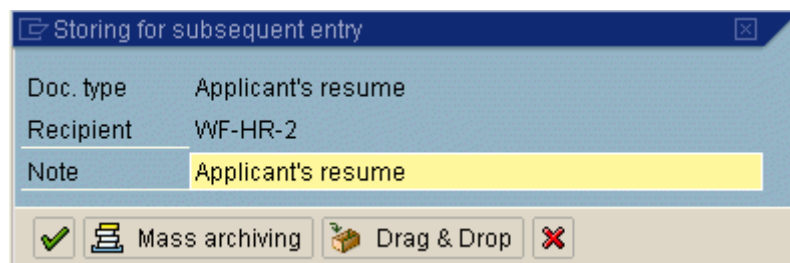
© 2012 SAP AG. All rights reserved.

4. Click **Mass Archiving**. If you are not already logged in to the Unity Client for use with SAP ArchiveLink, you will be prompted to log in. The Unity Client for use with SAP ArchiveLink is displayed.

5. Click the **Mass Archival** button in the **Integration Tools** ribbon.
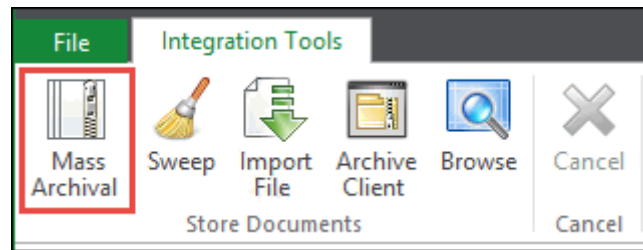
The **Mass Archival** pane is displayed, containing list of batches awaiting transfer.
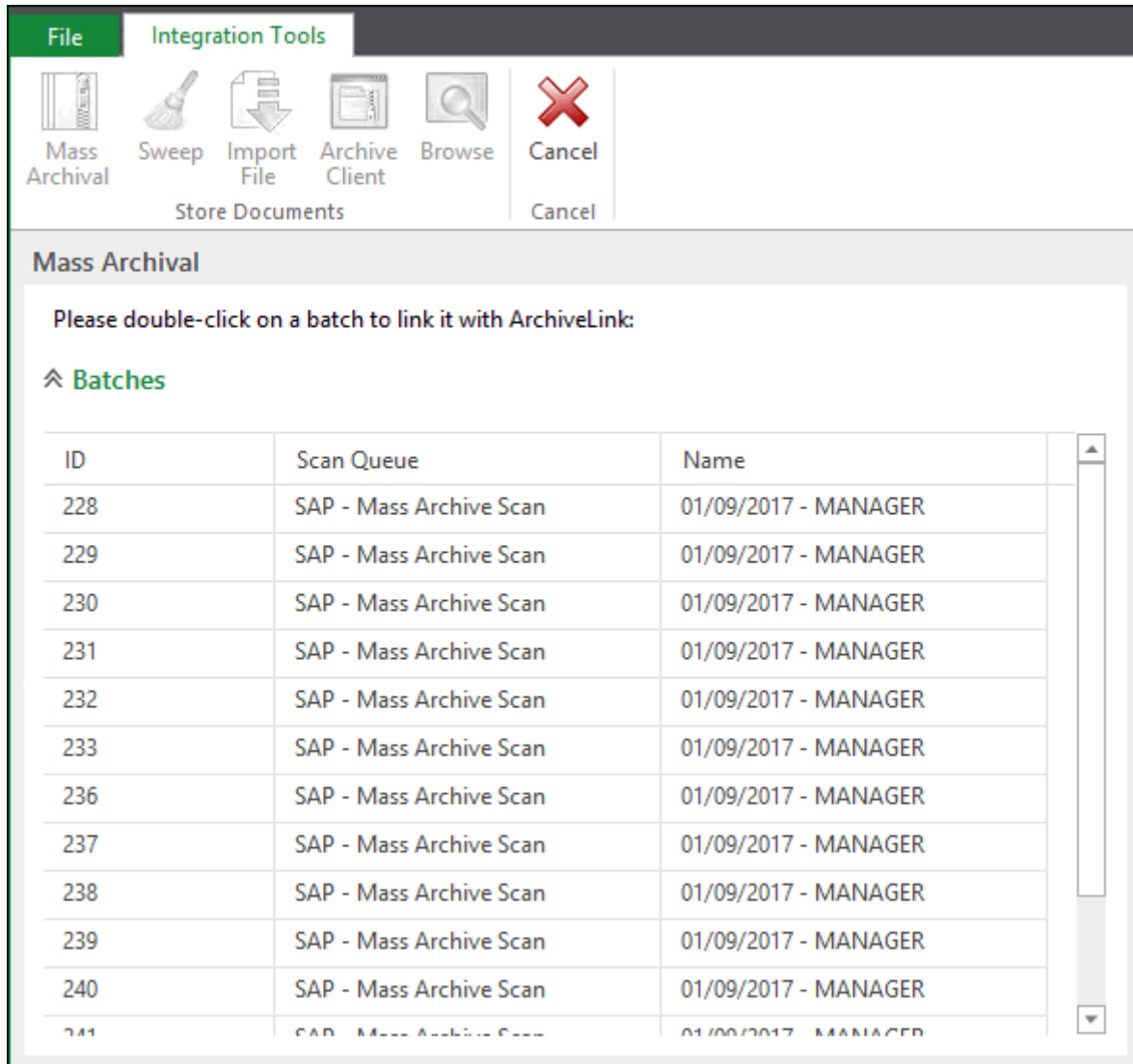
6. Double-click on the batch you want to archive into SAP. After the batch is successfully archived, a mess age is displayed confirming that it has been imported successfully.

   Once the batch is archived, it is waiting in the SAP Workflow for processing and the documents will be displayed in the **Committed** scan queue.

7. See .

Sweep

You can also sweep a file directory to bring documents into OnBase and SAP. To sweep:

1. Navigate to the **OAWD** transaction.
2. Find the appropriate SAP document type that you want to store the documents as and that is configured for the **Storing for subsequent entry** action.
3. Double-click on the document type.
   The **Storing for subsequent entry** dialog box is displayed.
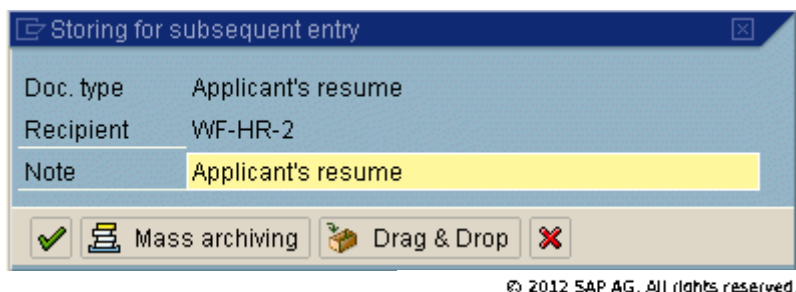
4. Click **Mass Archiving**. If you are not already logged in to the Unity Client for use with SAP ArchiveLink, you will be prompted to log in. The Unity Client for use with SAP ArchiveLink is displayed.
5. Click the **Sweep** button in the **Integration Tools** ribbon.
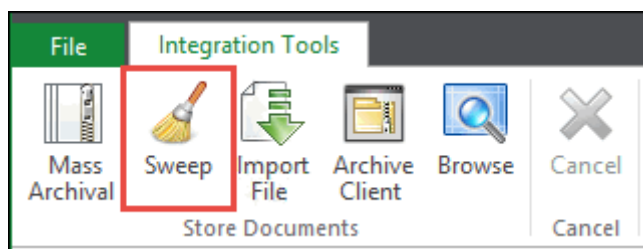
6. Enter the path or browse to the folder where the files you want to import reside.
7. If you want to delete the files from their original location after the sweep is complete, select **Delete Files After Sweep**. Otherwise, leave the option unselected.
8. Click **Sweep**.
   The **Sweep** pane is displayed in the Unity Client for use with SAP ArchiveLink, with the first found file in the folder selected.
9. Enter the appropriate file type, document date and keyword values in the fields of the **Sweep** pane.

10. Click the **Import** button.

    Alternatively, if a file was found that you do not want to archive, click the **Skip** button to move on to the next file.

11. Repeat steps 9 and 10 for each file found in the sweep.

    After each document is successfully archived, a mess age is displayed confirming that it has been imported successfully.

12. See

Import File

You can import one or more files into OnBase and SAP as a single document. To import files:

1. In SAP, navigate to the transaction or business object to which you want to add the document.

2. Open the **Archive from Frontend** dialog box.

3. Double-click the appropriate SAP document type that you want to store the document as and that is configured for the **Archive from Frontend** action. If you are not already logged in to the Unity Client for use with SAP ArchiveLink, you will be prompted to log in.

    The Unity Client for use with SAP ArchiveLink is displayed.

4. Click the **Import File** button in the **Integration Tools** ribbon.
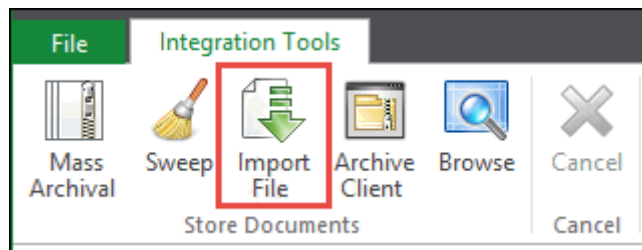
The **Import File** and **Preview** panes and the **Import** ribbon are now displayed in the Unity Client for use with SAP ArchiveLink.

5. Add files using either of the following methods:

    • To browse for an existing file, click the **Browse** button in the **Import** ribbon.

      Select a file to add it as a page in the document.
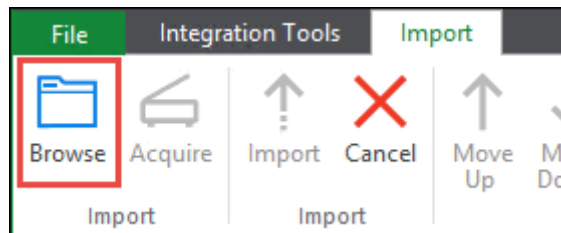
- • To acquire a file from an imaging device, click the **Acquire** button in the **Import** ribbon. If more than one device is connected to your workstation, you are prompted to select a device.

  Use the connected device's interface to capture or import a file and add it as a page in the document.

Note: If no imaging devices are connected to the workstation, the **Acquire** button will be disabled.

The document is displayed in the **Preview** pane.

6. If you want to add more files as additional pages in the document, repeat step 5 as many times as necessary.

7. If the document has multiple pages, select one by clicking its thumbnail in the preview pane. The sequence of pages in the document can be modified using the buttons in the **Pages** ribbon group of the **Import** ribbon.
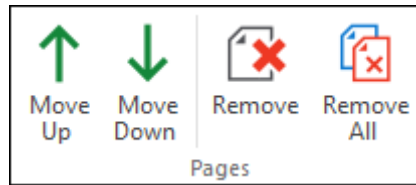
- Click the **Move up** and **Move Down** buttons to change the selected page's position in the document.
- Click the **Remove** button to remove the selected page from the document.
- Click the **Remove All** button to remove all of the pages from the document. A new file must then be selected to continue the import process.

8. If a page is not oriented properly in the preview, select it and use the **Rotate Left** and **Rotate Right** buttons until it is displayed the way you want it to be saved.
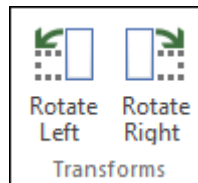
9. Enter the appropriate file type, document date and keyword values in the fields of the **Import File** pane.

10. Expand the **Options** section of the **Import File** pane for additional settings.
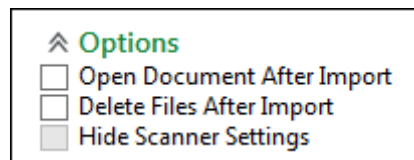
- Select **Open Document After Import** to view the document after the import process is complete.
- Select **Delete Files After Import** to delete the files which make up the document from their original location after the import process is complete.
- Select **Hide Scanner Settings** to hide the scanner settings dialog. You will not be prompted to select a device. If no imaging devices are connected to the workstation, the option will be disabled.

11. When the document is ready to be imported, click either the **Import** button in the **Import File** pane or the **Import** button in the ribbon.

    A mess age is displayed confirming that the document has been imported successfully.

12. See .

Processing Documents in SAP Workflow

Once the documents are in SAP, access the Workflow queue by doing the following:

1. Login to the SAP interface.
2. Enter the workplace inbox (transaction **SBWP**).
3. Expand the Inbox.
4. Click on the Workflow queue.

To process a document in the SAP Workflow:

1. Double-click on a document. The document will open in the Unity Client for use with SAP ArchiveLink or DocPop (depending on your configuration) and the **Process Document Type** dialog is displayed in SAP.
2. Click **Continue**. The **Header Data** screen will display.
3. Enter the appropriate information from the document being viewed in the viewer.
4. Click **Save**.

Bringing Documents into SAP Using Late Storage

Late storage involves linking an already existing OnBase document to an SAP business object.

The following methods can be used for late storage:

Archiving Documents with Bar Codes

If business objects exist in the SAP system that you want to link to documents, you can bring the documents into OnBase and link the document and the business object using bar codes.

To bring in documents and link them to business objects:

1. In OnBase, scan the documents into a scan queue configured with the **SAP ArchiveLink Integration** option.
2. Index documents as the configured Document Type for SAP integration, and enter the correct value for the **SAP ArchiveLink Barcode** Keyword Type.
3. After indexing is complete, commit the batch. When polled, the document will be attached to the business object.

Archiving Document Batches without Bar Codes

You can archive documents from application queue batches that are in OnBase using the Archive Client function of the Unity Client for use with SAP ArchiveLink.

To archive a batch of documents, in SAP:

1. Navigate to the **OAWD** transaction or any transaction where you would like to link a document.

2. Find the appropriate document type that you want to store the document under and that is set up with the **Storing for subsequent entry** action.

3. Double-click on the document type. The **Storing for subsequent entry** dialog box is displayed.
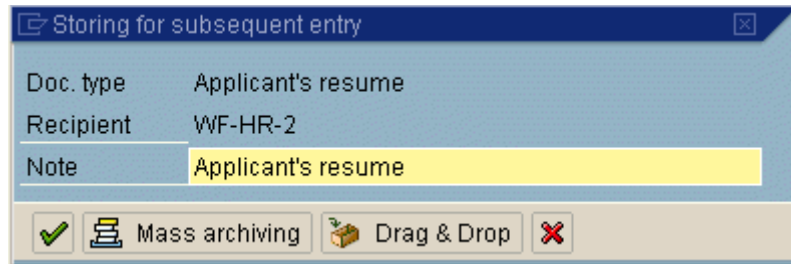

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4. Click **Mass Archiving**. If you are not already logged in to OnBase, you will be prompted to log in. The Unity Client for use with SAP ArchiveLink is displayed.

5. Click the **Archive Client** button in the **Integration Tools** ribbon.
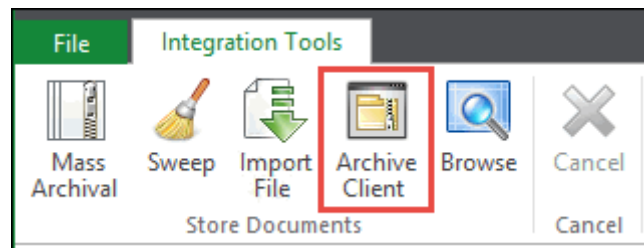
The **Archive Client** and **Document Viewer** panes are displayed, as well as the **Document** ribbon.

6. The **Application Queue** drop-down list in the **Archive Client** pane contains all of the application queues configured for your system. Select the application queue you want to archive documents from and click the **Process** button.

7. The committed batches in the selected application queue are displayed in the **Batches** section. Select the batch you want to process.

    The documents in the batch are listed in the **Documents** section of the **Archive Client** pane, and a preview of the selected document is displayed in the **Document Viewer Pane**.

Note: See the **Unity Client** documentation for more information about the **Document Viewer** and document-specific ribbons.

8. Select the documents that you want to process into the SAP system.

9. Return to the **Storing for subsequent entry** SAP dialog box.

10. To process one document at a time starting with the first selected document, click **Create**.

    To process all of the documents selected, click **Mass Archiving**.

    Once a document is processed, a message is displayed indicating that the link was successful and it is removed from the batch.

11. When you are finished archiving documents from the batch, click the **Stop** button. Clicking **Stop** unlocks the batch and allows you to select another batch to process. Upon clicking **Stop**, the **Process** button is enabled again.

Archiving a Single Document without Bar Codes

You can archive single documents that are already stored and indexed in OnBase using the Browse function of the Unity Client for use with SAP ArchiveLink.

To archive a single OnBase document, in SAP:

1. Navigate to the **OAWD** transaction or any transaction where you would like to link a document.
2. Find the appropriate document type that you want to store the document as and that is configured for the **Storing for subsequent entry** action.
3. Double-click on the document type. The **Storing for subsequent entry** dialog box is displayed.
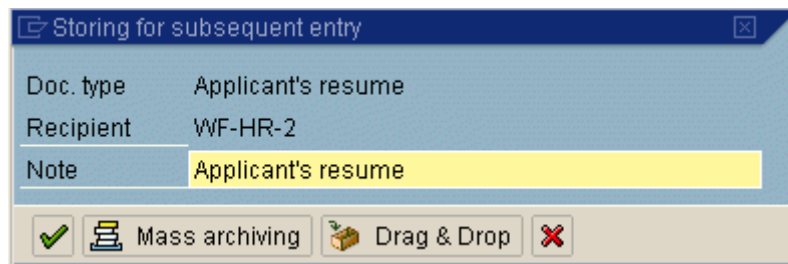
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4. Click **Mass Archiving**. If you are not already logged in to OnBase, you will be prompted to log in. The Unity Client for use with SAP ArchiveLink is displayed.
5. Click the **Browse** button in the **Integration Tools** ribbon.
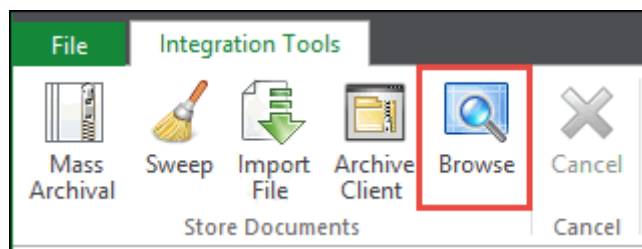
The **Browse** and **Search Results** panes are displayed, as well as the **Document** ribbon.

Note: See the **Unity Client** documentation for more information about document retrieval, the **Document Viewer**, the **Search Results** pane, and document-specific ribbons.

6. Use the **Browse** pane to retrieve a document. Found documents are listed in the **Search Results** pane.
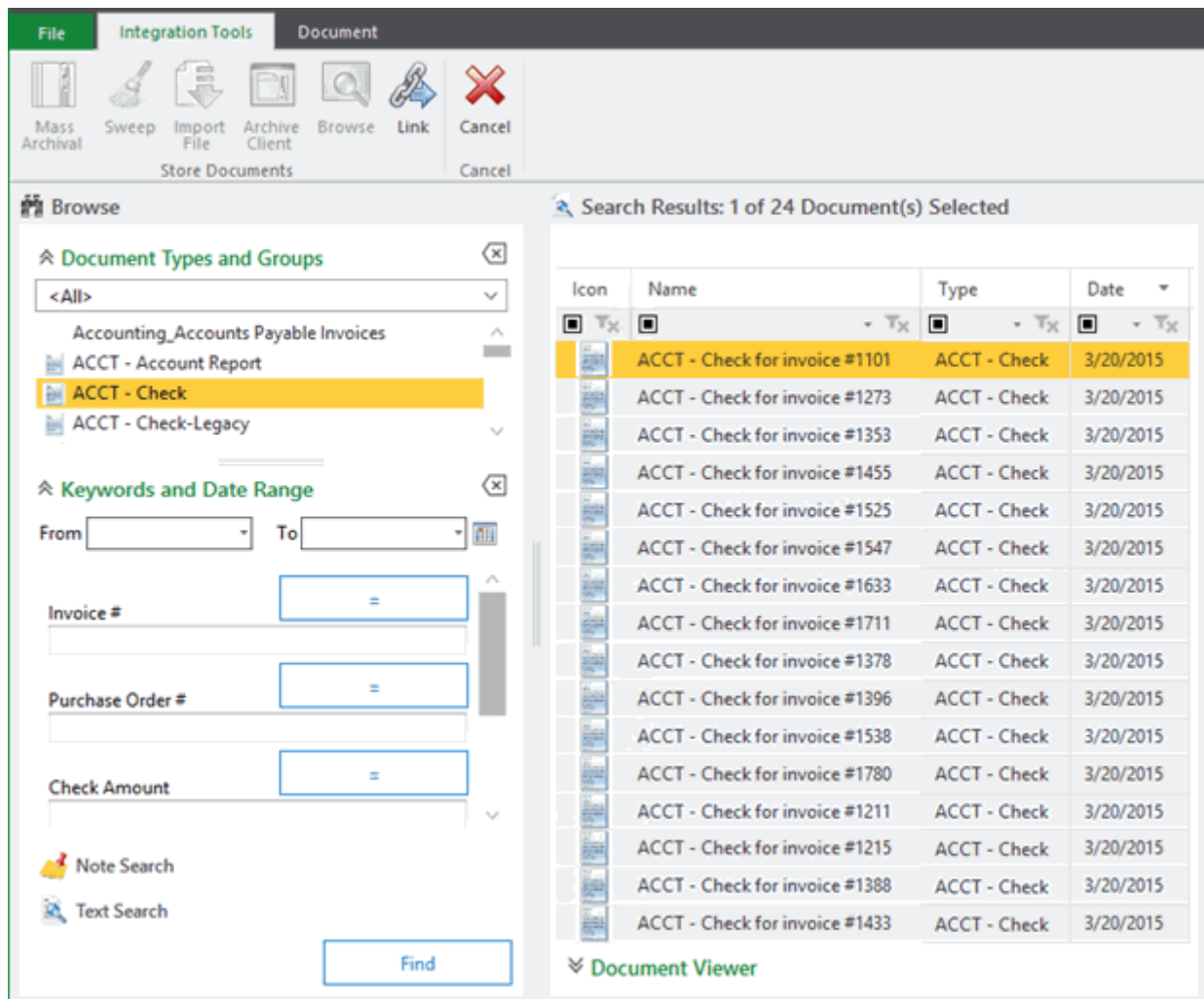
7. Optionally, select a document in the results list and expand the **Document Viewer** to view the document, or right-click it for more options.

8. Select the document you want to archive in SAP and click the **Link** button in the **Integration Tools** ribbon, or right-click the document and select **Link**.
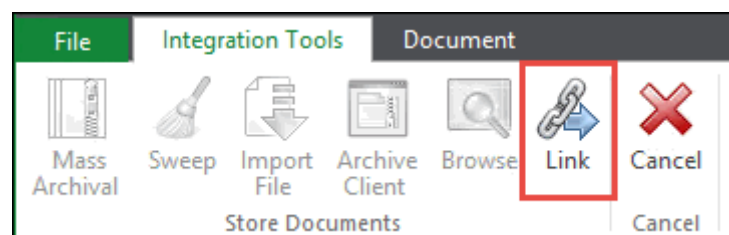
A message is displayed indicating that the link was successful.

Other Features of the Unity Client for use with SAP ArchiveLink

Features specific to the Unity Client for use with SAP ArchiveLink not covered elsewhere in this guide include:

Launching Archive Client from the System Tray

The Archive Client function can be accessed directly as an alternative to using the **Storing for subsequent entry** dialog box in SAP to launch the Unity Client for use with SAP ArchiveLink and then clicking the **Archive Client** button.

If you are already logged in to OnBase, right-click the OnBase icon in the system tray and select **Archive Client**.
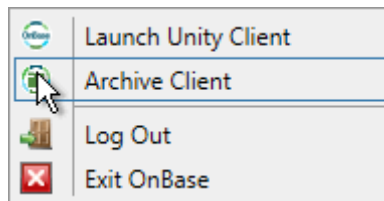
The Unity Client for use with SAP ArchiveLink opens with the **Archive Client** and **Document Viewer** panes displayed. Batches can be selected for processing to be performed in SAP.

Shared Login with the Unity Client

If you have the standard Unity Client installed on the same workstation as the Unity Client for use with SAP ArchiveLink, logging in to either one is required only once. Logging out of either client also logs you out of the other.

For example, if you are already logged in to the Unity Client for use with SAP ArchiveLink and you launch the Unity Client from the system tray or a desktop shortcut, you will be automatically logged in.

Alternatively, if you log out of the Unity Client or exit OnBase, you will be prompted to log in to the Unity Client for use with SAP ArchiveLink the next time it its launched.

Troubleshooting Layout

> **Note:** The **Troubleshooting** layout is intended for use by your first line of support or users trained to interpret various troubleshooting messages.

> **Note:** For information about **On Demand Diagnostics**, see the **Workflow** or **WorkView | Case Manager** module reference guides.

The **Troubleshooting** layout is accessible from within the **File** menu. To access this layout, click the Application icon and select **Troubleshooting**:
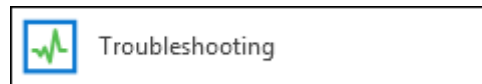
This layout shows **Troubleshooting Messages**, **Connection Information**, **Message Sources**, **Rendering Information**, **Performance Counters**, **Client Side Locks**, and **Memory Usage**. You can also create **Bug Reports** from this layout.

Troubleshooting Messages

The main pane within the Troubleshooting layout is the **Troubleshooting Messages** pane. This pane displays the **Timestamp**, **Type**, and **Message** for each entry.

To export the contents of the Troubleshooting Messages pane, click **Save to File**.

Exporting the messages to file is useful when communicating with support. The resulting file, which is a Log file (.log), is saved to your workstation for later use.

To clear the contents of the pane, click **Clear Log**.

> **Note:** The Troubleshooting Messages log is limited to 20 MB.

Creating Bug Reports

Bug Reports can be created from the Troubleshooting layout. Bug Reports generate zipped files that include documents containing relevant **Messages**, **Exceptions**, **Logging Service** information, the **Timestamp** of the creation time and date of the Bug Report, and, if selected, a screenshot. The file can be provided to a system administrator or solution provider when registering your issue.

Note: Bug Reports are not a substitute for a formal reporting mechanism within your organization.

To create a Bug Report:

1. Right-click within the **Troubleshooting Messages** pane and select **Create Bug Report**.
2. The **Create Bug Report** dialog is opened.
3. Enter your name and email into the **Name** and **Email** fields.
4. Select **Include Screenshot** if you would like to add a screenshot of the active layout to your report.
5. In the field at the bottom of the dialog, include a detailed description of the bug you encountered.
6. Click **Save To Desktop**. The Bug Report file will be found on your workstation Desktop. Send this file to your OnBase system administrator.

Using the Request Profile Diagram

The **Request Profile Diagram** layout is used for monitoring latency in Service Requests. Requests that fail, timeout, or return an exception are visible in this layout.

In order to see Service Request timing results, the minimum error level of the logging route must be set to **Trace**. To set the minimum error level, do one of the following:

- Uncomment the following line in the Application Server web.config file:

  ```
  <!-- <add key="minimum-level" value="Trace" /> -->
  ```

  For more information, see the section on setting the logging level in the **Diagnostics Service and Diagnostics Console** module reference guide.

- In the Web Application Management Console, select **Diagnostics | View Diagnostics Settings** and set the **Minimum Error Level** of the logging route to **Trace**. For more information, see the section on editing diagnostics settings in the **Web Application Management Console** module reference guide.

To access the Request Profile Diagram layout, click the Application icon and select **Troubleshooting | Request Profile Diagram**:
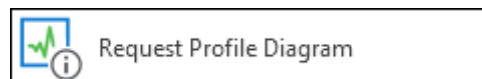
Press **Record** to begin profiling actions performed:
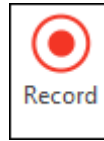
A live graph of requests made to the server is available in this view.

The information collected in this layout can be saved as an .URP file by clicking **Save**. These saved files can be opened again at a later time by clicking **Open** and selecting the previously saved .URP file.

Note: Saved .URP files can only be opened in the same version of OnBase in which they were created.

Note: Only data can be exported to file. The graph itself cannot be saved.

Tracer Requests, which can be sent by clicking **Send Tracer**, may help diagnose environmental issues.
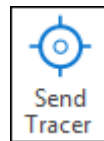
The information displayed in the Request Profile Diagram can be cleared by clicking **Clear**.
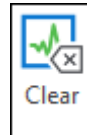
Overview

The FIORI Extension is an extension of the Attachments Service for FIORI Applications that allows a user to upload documents to OnBase that are related to a Business Object stored in SAP, for later retrieval and viewing. The FIORI Extension leverages the same ArchiveLink configuration that is used in the SAP GUI.

Note: For information about adding the FIORI Extension for SAP ArchiveLink to your solution, contact your first line of support.

Accessing the FIORI Extension

To access the FIORI Extension:

1. In the FIORI Launchpad, navigate to the configured Hyland FIORI Application and retrieve an SAP Business Object.

Note: SAP FIORI is a product of SAP. For information on using and configuring SAP, refer to the SAP documentation.

2. Click the **Attachments** tab to navigate to the **Attachments** section of the Business Object.

    The **Attachments** section is displayed.
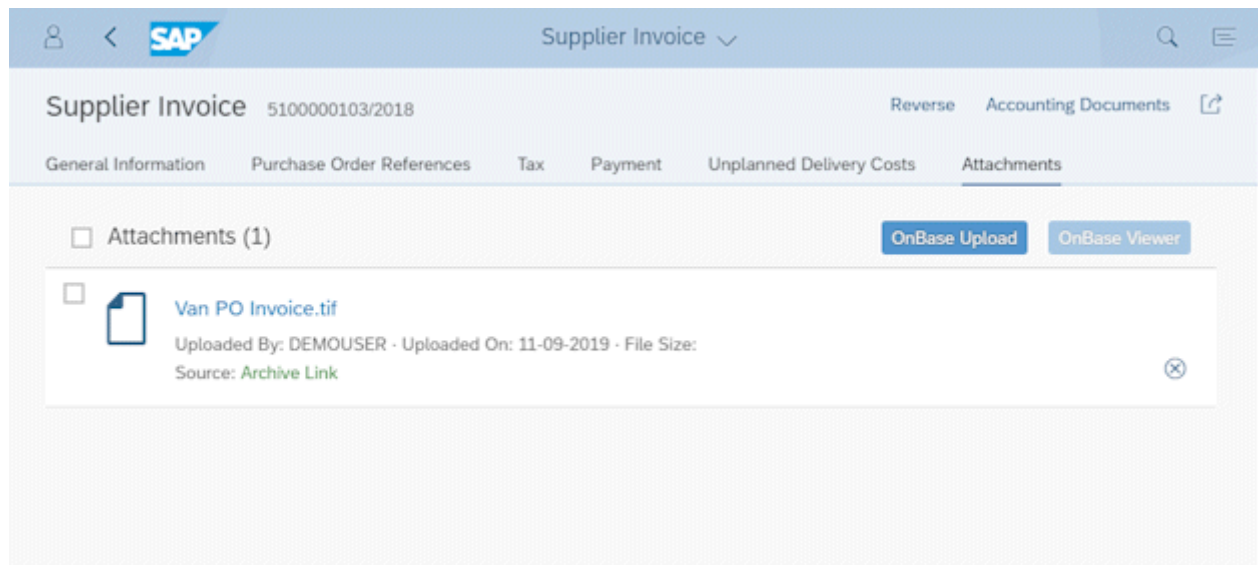
From the **Attachments** section, you can perform the following actions:

- Attaching a Document
- Viewing Documents
- Deleting a Document

Attaching a Document

To attach a document to a Business Object:

1. In the **Attachments** section of the Business Object to which you want to attach a document, click **OnBase Upload**. The **Global Document Types** dialog is displayed.
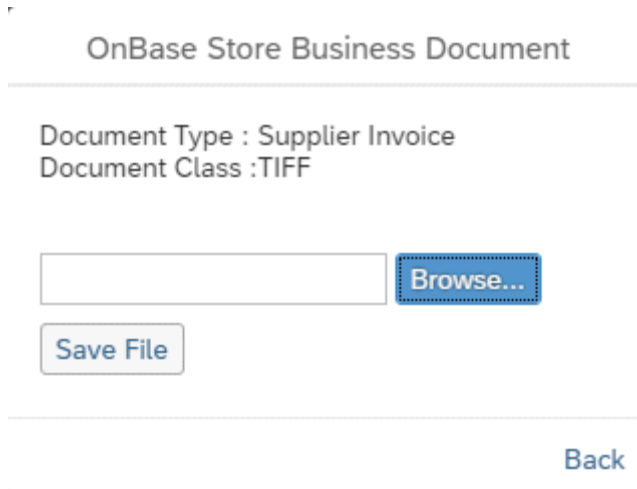
2. Click the Document Type to which you want to attach the document. The **OnBase Store Business Document** dialog is displayed.
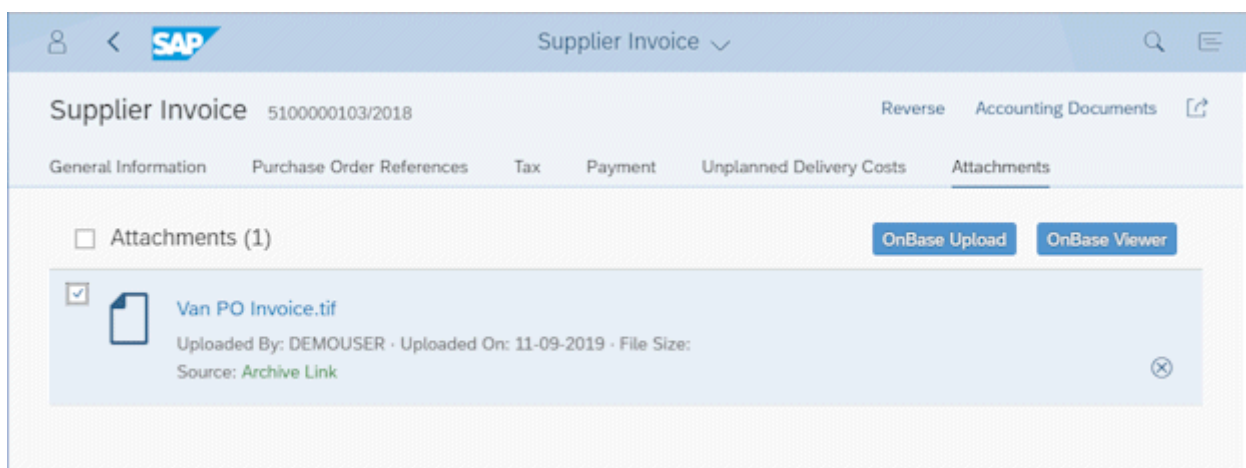
3. Click **Browse** to open a file browser and locate the document you want to attach. When the document is selected, click **Save File** to attach the document.

    You can click **Back** to return to the **Global Document Types** dialog to select a different Document Type.

Viewing Documents

To view attached documents:

1. In the **Attachments** section of the Business Object containing the attachment you want to view, select the check box next to the attachment or attachments.
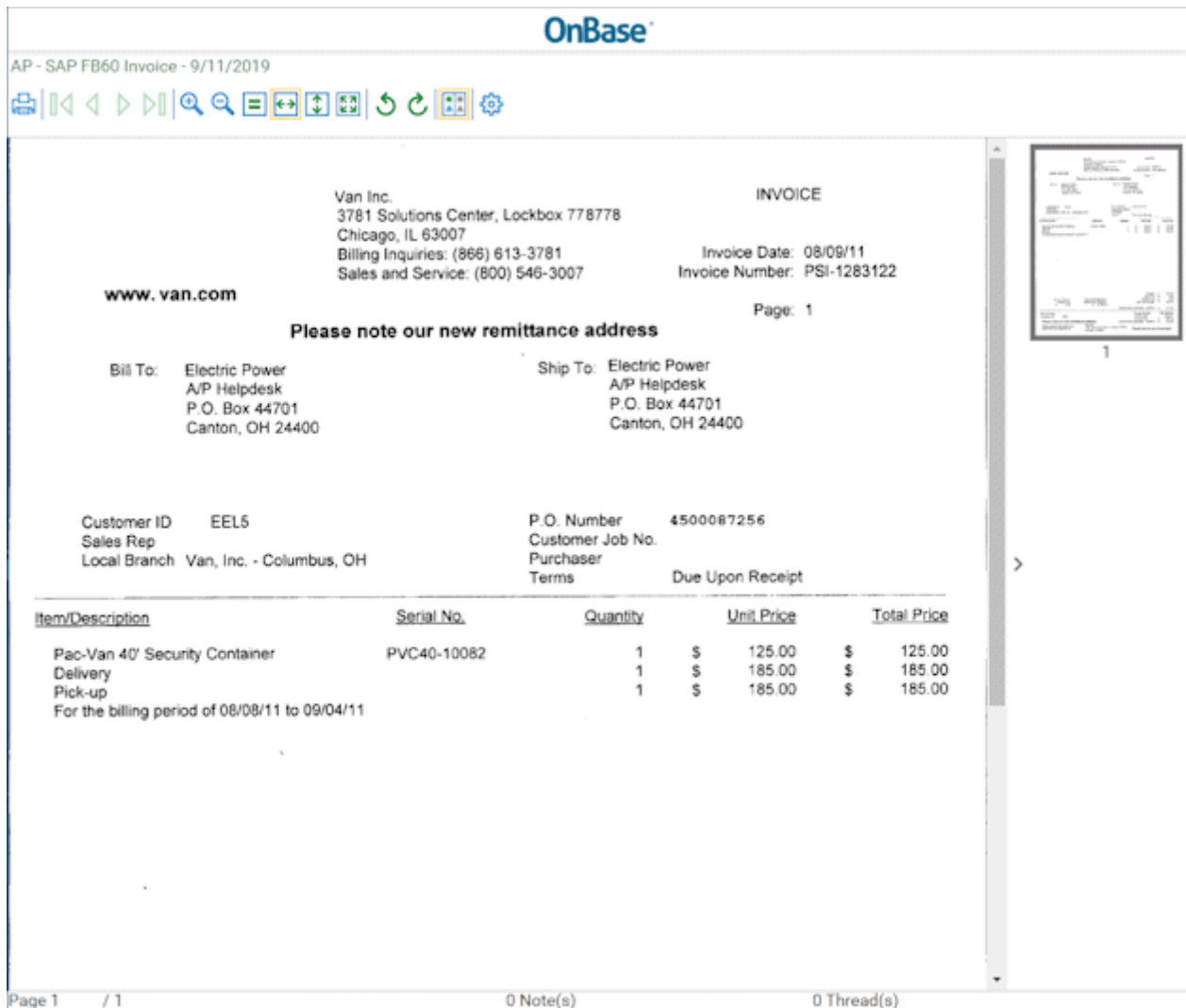
2. Click **OnBase Viewer**. A Web Client login screen is displayed.

3. Log in to the Web Client using your OnBase credentials.
   The attached document is displayed in the viewer.

If multiple attachments were selected to view, the list of documents is displayed above the viewer, and you can click on a document in the list to display it in the viewer.
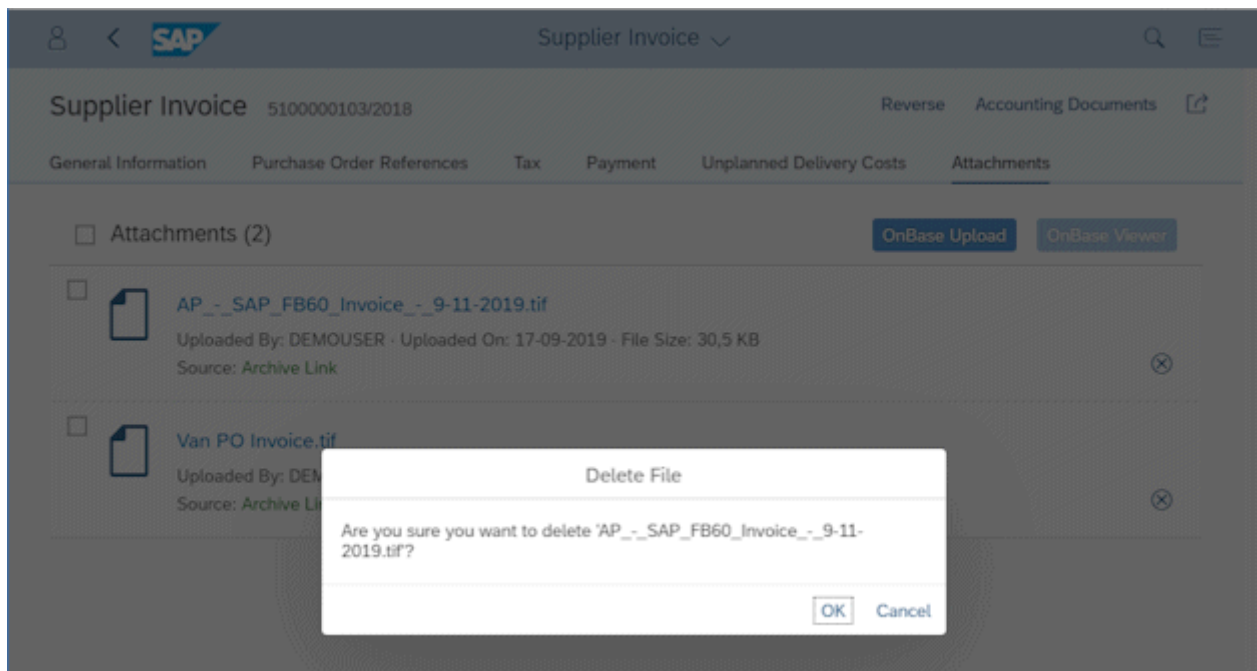
Deleting a Document

To delete a document:

1. In the **Attachments** section of the Business Object containing the attachment that you want to delete, click the **X** button on the right side of the attachment.
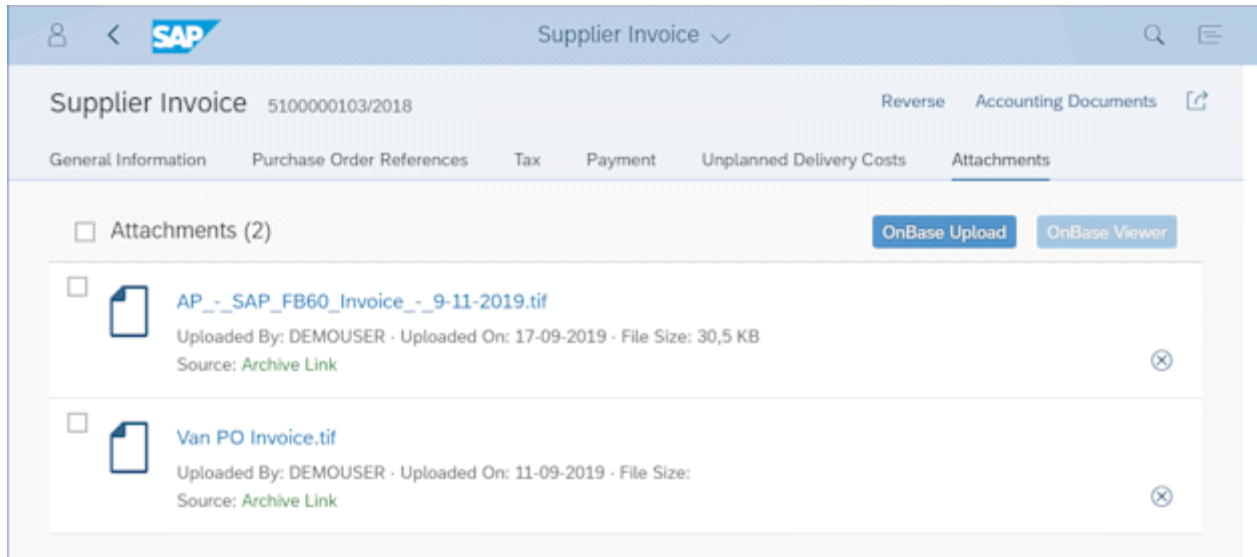
2. The **Delete File** dialog is displayed.

Click **OK** to delete the attachment, or click **Cancel** to keep the attachment.