



University of Colorado

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OnBase Guide – Exporting and Importing Configurations

Goal: To use the import/export framework for configuration migration in OnBase.

Complexity Level: Departmental Administrative Users

1/2/2024

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Background

As we work in a [multi-environment system](#), it is necessary to migrate configuration you've developed and tested in non-production (DMOTST) to production (DMOPRD) once you are ready to go live.

This process can also be used to save configurations outside of the OnBase system if there is a refresh occurring, so items in development can be imported back into the non-production environment after the refresh so you do not lose any in-progress development work.

This guide intends to supplement the MRGs and other resources to help you use each client to perform exports and imports so you can migrate your items between environments or back them up (prior to an environment refresh or before making significant changes).

The migration process consists of creating an export file from the source environment and then importing that file to the destination environment. Or for a backup, you only need to do the first step of creating the export file.

For example, if you were migrating a new life cycle from DMOTST to DMOPRD, in DMOTST you'd create an export file for the configuration, then go to DMOPRD and import that file.

It can be helpful when migrating a new project to production to first migrate to STG. This gives you a chance to verify functionality in STG after an import and identify any issues in the migration process (such as items that weren't included in the export file or incorrect resolutions).

Since most changes require an [application server cache reset](#) (or even an app pool recycle), it's best to migrate changes at the end of the day or after business hours. Mid-day migrations can result in users accessing different configuration or encountering errors depending on when they signed in, when the app pool was last recycled, etc.

NOTE: In previous versions of OnBase, there was an option to "commit" or "revert" the changes the import made. This is no longer possible in version 18+. If you encounter any errors or issues during a migration, please contact UIS_DM_Support@cu.edu for assistance.

Before Proceeding

Simultaneous imports cause conflicts in the data written to the configuration tables, which can lead to data loss and loss of functionality. A warning will appear, but not until a problem arises at which point extensive correction is needed. Since the software does not prevent these potential issues, we need to be very careful to manage this ourselves.

For all imports to production, send an email to dmptca@cu.edu before starting and when you are done. Until you see that the last person is done, do not start an import! This applies off-hours as well.

Prerequisites

Depending on what type of configuration you are exporting/importing (refer to [Client Compatibility](#)), you may need to use OnBase Configuration, Studio, the Unity client, Unity Management Console and/or the thick client. Most of the time, you'll be using Configuration or Studio.

You will also need to have connections to both the environment you are exporting from and the environment you are importing to. Refer to the [OnBase Client Guides](#) for instructions on installation of any applicable clients.

Resources

More information is available in the System Administration MRG and Studio MRG (Using Change Control) for most configuration types.

Hyland also offers the following courses through our premium subscription:

- [Import/Export Framework](#) (30 minutes)
- [Workflow Developers Toolbox](#) (48 minutes)

Contact UIS_DM_Support@cu.edu for assistance as needed.

Client Compatibility

Certain configuration items can only be exported and imported using one client. You may need to create multiple export files and perform multiple imports for some



projects. When doing so, consider which items are dependent on items in other exports to determine the order to import.

Whichever client is used to create the export file will also need to be used for the import. You cannot, for example, create an export file for a document type from Configuration and import that file using Studio.

For the most updated information, please refer to the clients as more options are added with upgrades to make the items available in each client more consistent. **This is up to date as of EP3 (build 20.3.44.1).**

Configuration Type	Studio	Config	Unity Client	Unity Management Console	Thick Client
Advanced Capture Templates					X
AutoFill Keyword Sets		X			
Bar Code Processes		X			
Capture Process	X	X			
Cascading Data Sets		X			
COLD Processors		X			
Custom Queries		X			
DIP		X			
Document Composition Templates	X	X			
DRIP		X			
Document Types	X	X			
Folder Configuration	X	X			
Form Templates	X	X			
Item Generators/Sets	X	X			
Keyword Type Groups		X			
Keyword Types		X			
Mailbox Importer Accounts		X			
Note Types		X			
Notifications	X	X			
Packet Templates	X	X			
Portfolio Types/Relations	X	X			
Reporting Dashboards/Data Providers/Reports	X	X	X (with escalated privileges)		
Scan Queues	X	X			

Unity Form Themes	X	X			
Unity Scheduler Tasks	X	X		X	
Unity Scripts	X	X			
User Groups		X			
Workflow Life Cycles	X	X			
Workflow System Tasks	X	X			
WorkView Configuration	X	X			

Pre-Migration Tasks

Prior to migrating any configuration to production, ensure that thorough **testing** has been completed.

Review which types of configuration items (document types, form templates, workflow life cycles, etc.) are involved. It can be helpful to make notes or a list throughout your configuration and testing process to be sure that your export/import will include everything and so you'll remember what should be done with each item.

If migrating Workflow configuration, **run the Workflow Doctor** in Studio prior to export to confirm no issues are identified. See the *Workflow Doctor* section (page 368) in the Workflow MRG for more information.

If you are making changes to existing configuration and the current-state configuration will no longer exist in any environment, you may want to **create an export of that current-state configuration as a backup** in case it needs to be restored (or referenced in the future).

If you are importing to production, or importing to non-production following an environment refresh, communicate to the distribution list ([see Before Proceeding](#)).

Exporting

Exporting your configuration creates a file that contains the configuration data so that it can be imported.

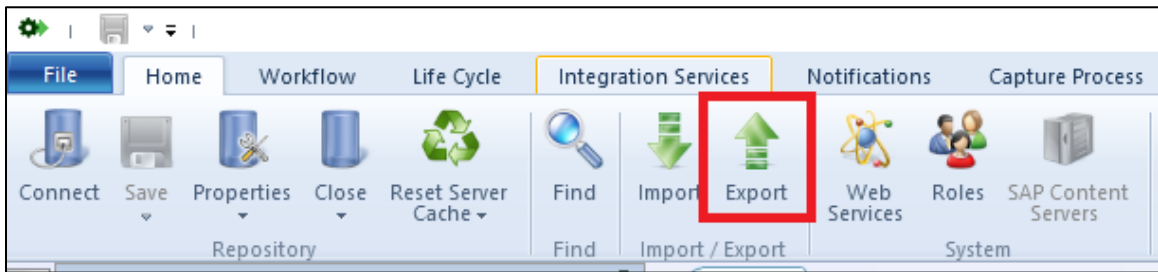
It can be helpful to have a consistent pattern to your file names (ex. XYZ WF - TST for PRD - 9-10-2020) so you can keep them if needed for future reference or to restore a previous version. A consistent way of naming your export files will make it easy to tell what's in each file.

NOTE: If your export is not successful, or partially successful, please review the message provided, and resolve any issues. If you are unsure of the error shown, please review the “System Administration” MRG in OnBase or contact uis_dm_support@cu.edu for additional support.

Exporting from Studio

In Studio, items that are password protected cannot be exported or replaced. The password protection will need to be removed prior to migration. Items will need to be checked in before they can be replaced in the destination environment.

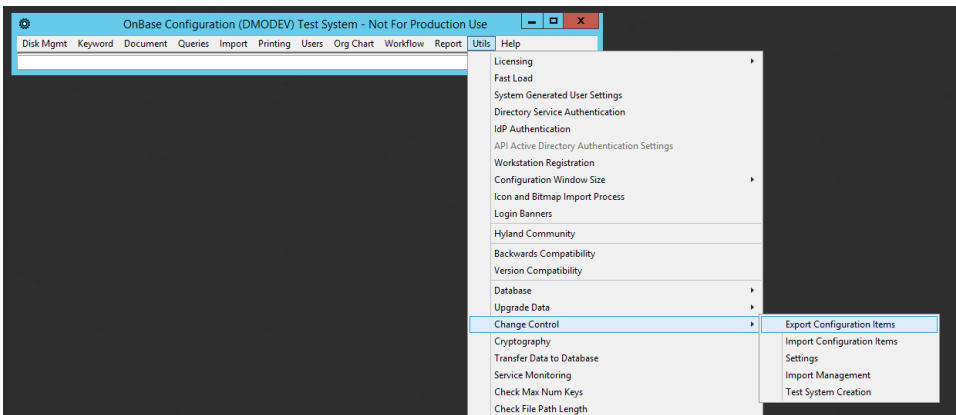
1. Open OnBase Studio and connect to the environment you want to export from. Once you are logged in, click the **Export** button on the Home tab of the menu ribbon.



2. Proceed with [common export steps](#).

Exporting from the Configuration Client

1. Open the Configuration client of the environment you want to export from. Once logged in, go to **Utils > Change Control > Export Configuration Items**.

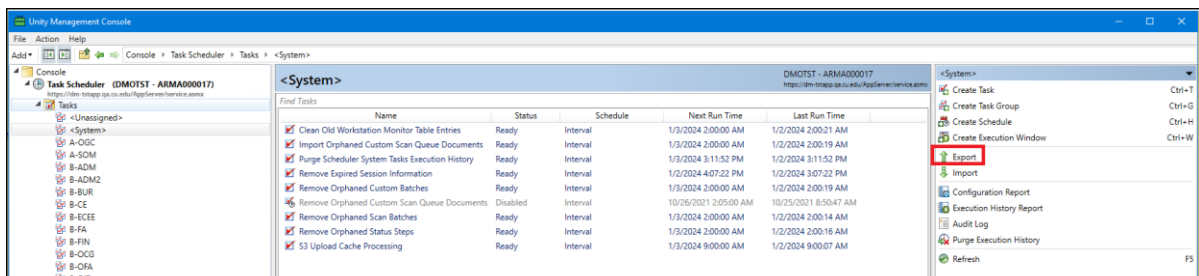


2. Proceed with [common export steps](#).

Exporting from Unity Management Console (Scheduler Tasks for Workflow Timers etc.)

This migration can and will typically be done using Configuration or Studio, but can also be done within Unity Management Console (UMC). For more information, refer to the Unity Scheduler MRG.

1. Open UMC and connect to the applicable environment.
2. Choose Export from the menu on the right side.



3. Proceed with [common steps outlined here](#).

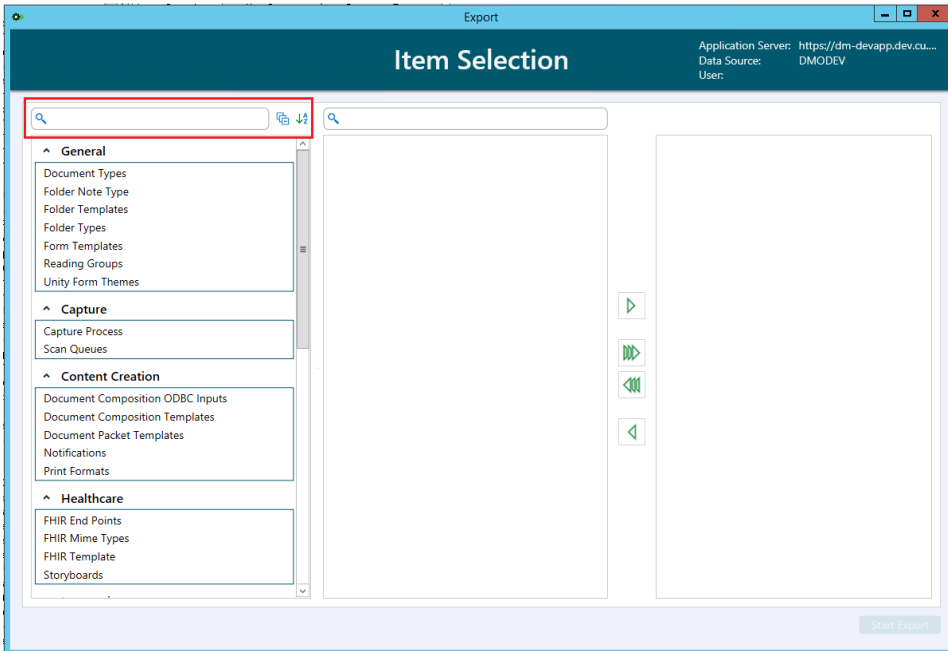
Common Export Steps for Studio, Configuration and UMC

1. Verify the environment listed is correct.
2. In the leftmost column, there are a list of types of items that are available for export. This list will be different in Studio and Configuration since certain types of items can only be exported from each client.

Select the type for the item(s) you want to export.

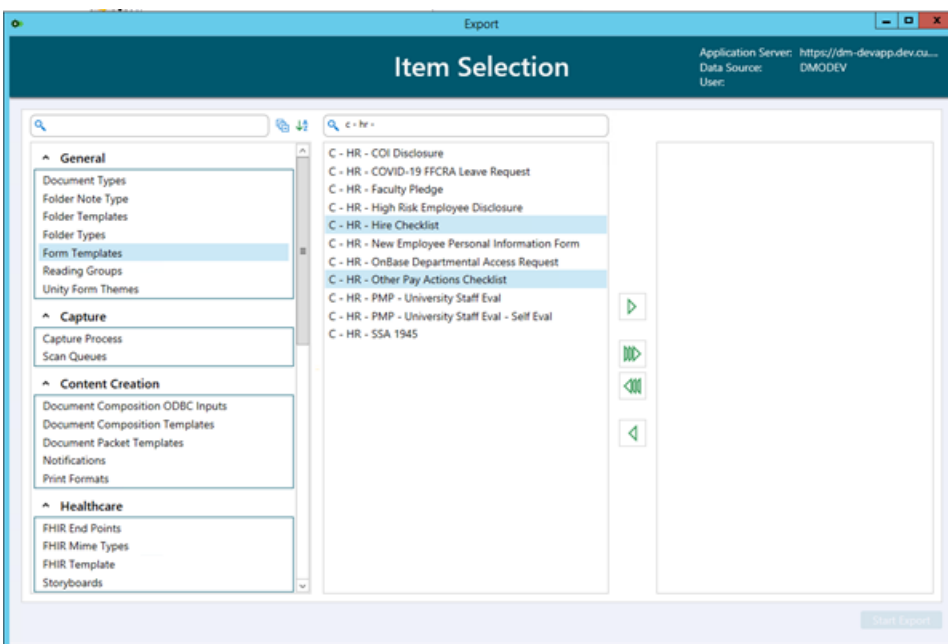
NOTE: If you want to export multiple item types, you will need to select each type and then each item from that category, then select the next type/category.

Above the list of item types, you can search or change how the list is grouped/ordered.

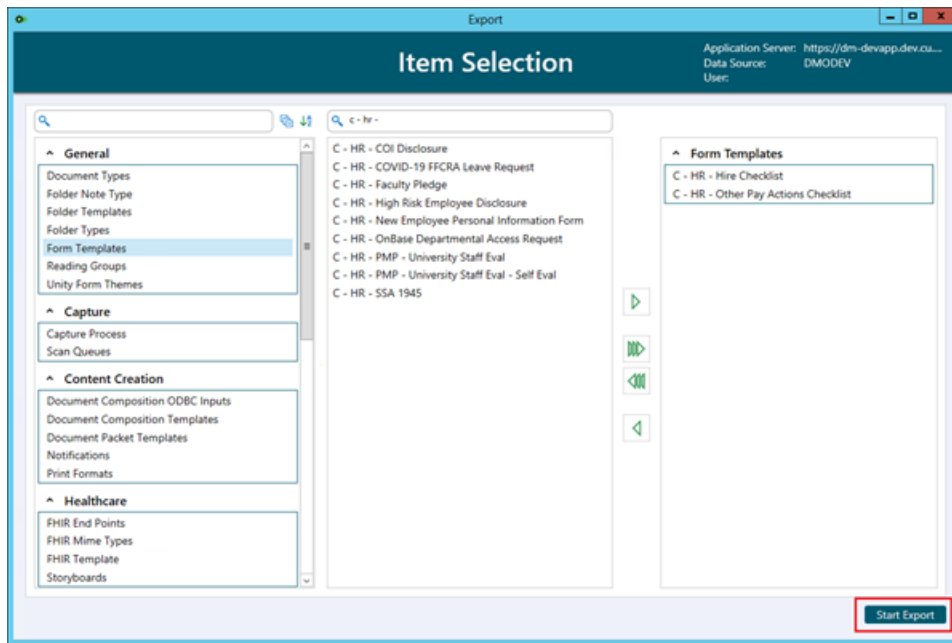


- Once you select an item type, the available items of that type will appear in the middle column. Select the item(s) you want to export, and then click the button with the double left arrows to move the item from the “available” list to the “selected” list. Alternatively, you can double click the item to move it.

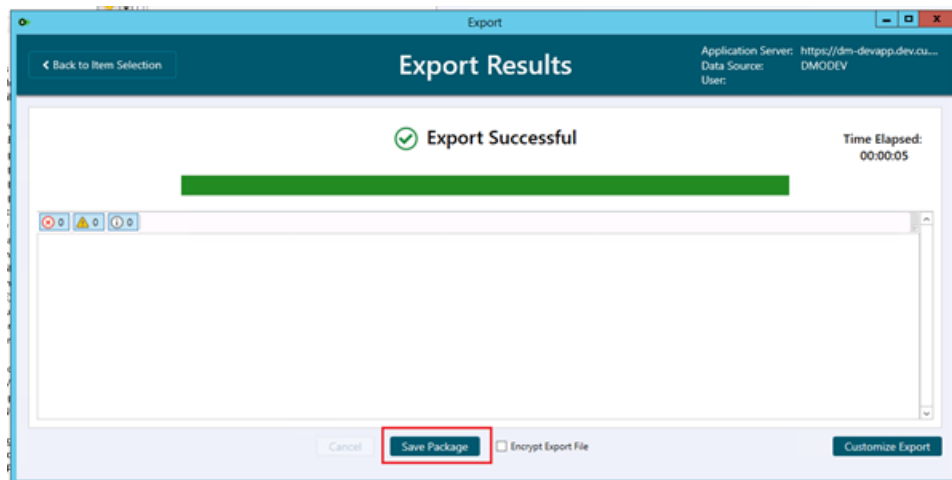
You are able to select multiple items for this step to move them to the “selected” list at once.



- Once you have selected all the items you want to export and they are listed in the “Selected” box, click **Start Export**.

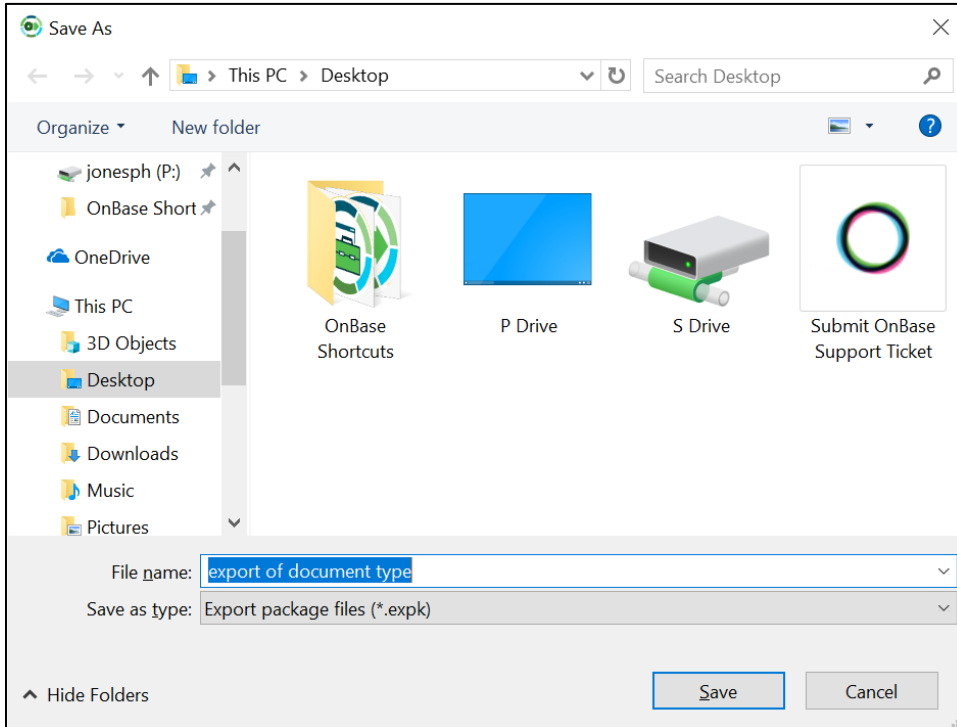


- As the export is processed, you can view the progress and any warnings or errors. You are also given the option of encrypting your export by selecting the checkbox.
- Once complete, click **Save Package**.



- Choose a location to save the export package, and name it appropriately. Then click **Save**. Typically, the ideal place to save it is on the desktop. Long file paths can prevent the file from being imported.





8. Once you have saved, you can close the Export window.

Exporting from the Thick Client (Advanced Capture Templates)

This will only be available at workstations licensed for Advanced Capture. Refer to *Importing/Exporting Advanced Capture Forms* in the Advanced Capture MRG for more details.

1. Open the thick client in the environment you want to export from (the source environment).
2. Navigate to **Advanced Capture Configuration** in the **Admin** menu.
3. Open an advanced capture template. In the lower right corner, select **Import/Export Configuration** in the Tools section.

MEMBER INFORMATION FORM
Public Employees Retirement Association of Colorado
PO Box 5800 Denver, Colorado 80217-5800
303-632-6050 or 1-800-729-PERA (7373)

8321198

Read the reverse side before completing this form. Please give complete information. Type or print in black ink, and sign below. If this form is for a new membership, give to your personnel office to send to PERA. If the form is for changing information PERA has on file, send directly to PERA, and provide a copy to your employer. You may call PERA to change your address. Do not complete this form if you are a PERA retiree receiving your PERA benefit and planning to work less than 110 days or 720 hours per calendar year. Please do not send photographs of this form or staples, tags, or glue items to it.

Example
Your SSN: 1234

New Member Changing PERA Information (Fill in name and any information you are changing and sign.)

Member: Last Name First Name Middle Name Former Name
Sex: Male Female Home Telephone Work Telephone

Birthdate: Month Day Year

Mailing Address: Street, Route, or Box Number, and Apt. Number City State ZIP Code

Spouse: Last Name First Name Middle Name Spouse's Birthdate Month/Day/Year

Named Beneficiary for Your PERA Account: If you die and no monthly survivor benefits are payable, a lump-sum payment will be made to your named beneficiary(ies). If you do not designate a named beneficiary(ies) or if your named beneficiary(ies) dies before you do, payment will be made to your estate. If you want to list more individuals than space permits, enclose a list of their names, relationships, Social Security numbers, birthdates, and addresses. If you designate more than one named beneficiary, the payment will be divided equally among them as required by state law. Sign and date any list you enclose. (To change your beneficiary for any PERA-sponsored life insurance coverage or for your PERA 401(a) Plan account, you must complete a separate beneficiary change form. Call PERA for the appropriate form.)

Primary Beneficiary(ies):
Street, Route, or Box Number, and Apt. Number City State ZIP Code

Contingent Beneficiary (optional): If my primary beneficiary(ies) does not survive me, I authorize PERA to pay the
Name Relationship SSN Birthdate
Street, Route, or Box Number, and Apt. Number City State ZIP Code

Tools:
Create/Assign Form Definition
Process Current Document
Process Entire Batch
Next Unconfigured Document
Default New Form/Zone Settings
Assign Current Scan Queue Only
Always Ask New Zone Type
Form Identity or Registration
Keyword Field
Form Definition Lookup Text
Keyword Value Field
Line Item Extraction
Grouped Line Item Extraction
Optical Mark Field
Signature Detection Field
Snippet Field
Global Keyword Lookup/Replace
Personal Organization Library
Import/Export Configuration
Advanced Options
Save Configuration
Discard Configuration Changes
Exit Configuration

4. Chose **Export**.

Confirm

Do you want to import or export configuration data?

Import **Export** Cancel

5. Select the desired templates from the list using the checkboxes.

Advanced Capture Configuration Export

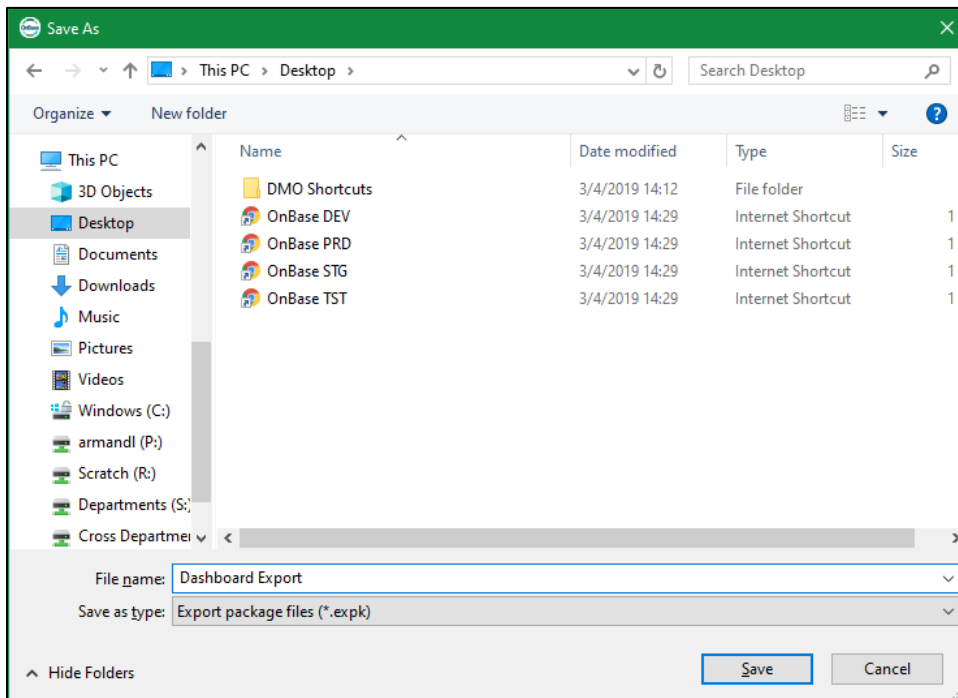
Form ID	Form Definition Name	Scan Queue	Assigned Document Type
<input checked="" type="checkbox"/> 102	B - BUR - Detail Financial Tra...	<All>	B - BUR - Detail of Financial ...
<input checked="" type="checkbox"/> 104	B - HR - Position Description	B - HR - Avature Scan Queue	B - HR - Position Description

Select All Deselect All

Output Configuration File: Browse

Export Cancel

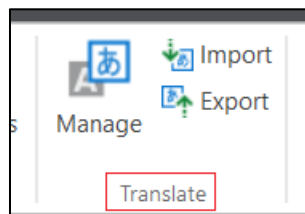
6. Click **Browse** to choose a location to save the export package, and name it appropriately. Then click **Save**. Typically, the ideal place to save it is on the desktop. Long file paths can prevent the file from being imported.



7. Click **Export**. Once you have saved, the save dialog will disappear. Click **OK** and exit.

Exporting from the Unity Client (Reporting Dashboards)

NOTE: The Export and Import options in the menu ribbon of the Unity form designer are for *translation purposes only*; migration of Unity form templates must be done using Configuration or Studio, not the Unity client.



Only reporting dashboard configuration uses the Unity client for migration. This requires escalated privileges, so Studio or Configuration will typically be used for reporting dashboard configuration migration.

Importing

The import process consists of selecting the file that was created in the export process and choosing how to resolve each item included in the file. **Every item** in the export will need to have a resolution applied.

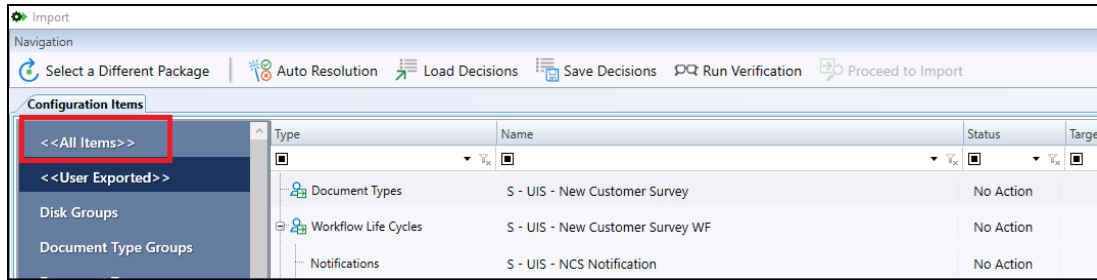
The resolution options are:

- **Create** - The item will be created in the destination environment.
 - This should be chosen for new configuration items that do not yet exist.
- **Replace** - The item will replace an item in the destination environment.
 - You will need to choose the item to replace.
 - This should be chosen for *modified configuration* of existing items, such as importing a new version of a form template or workflow.
 - This option says: “replace [x configuration item] in the destination environment with the information for [x item] in the export file”.
 - Replace can only be used if there is an existing item in the destination environment that can be referenced.
- **Map** - Items can be mapped to *existing items* in the destination environment.
 - Any references to the item in the export/import file will reference the existing item selected from the list.
 - This should be chosen for items that are unchanged between environments.
 - Mapping means the item will not be changed in the destination environment based on the export file.
 - This option says: “wherever my export file references [x configuration item], use [x item] in the destination environment, without changing anything”.
 - Map can only be used if there is an existing item in the destination environment that can be referenced.
- **No Action** - The item will not be imported or considered in the import process.
 - In some circumstances, this option will not be available for certain items if other items depend on the item.
 - If a reference to someone else’s configuration is included in your export file and that item doesn’t exist in the destination environment, this option should be chosen to avoid creating configuration in production that they are not ready to create there.

In order to proceed with an import, at least one item will need to have a Create or Replace resolution selected. Otherwise, there is no change to apply to the destination environment so the import process will not allow you to continue.

Once you have chosen a resolution for each item, make sure you review **everything** by choosing “<<All Items>>”. Then filter using the Status column to see all items that are about to be created (paying special attention that this does not include items unintentionally), replaced, mapped, etc. If there are any items referenced in the

migration that do not belong to your department, make sure they are **not** set to be created or replaced (choose either “no action” or “map”).



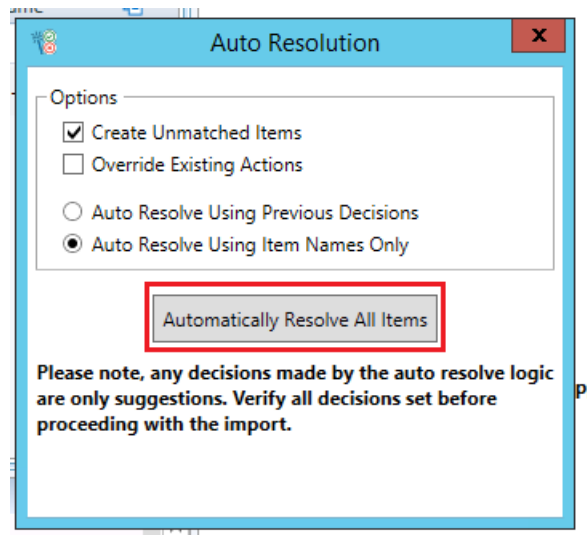
Multiple rows can be selected to change the resolution on many items at once.

If you are resolving a configuration item that is the parent of other items (like a life cycle, which is the parent to queues, rules, actions, etc.), the decision you apply to that item can be applied to child items as well. The import wizard will do its best to determine whether each child item can be mapped/replaced, created, etc. but you will need to review to ensure the right resolution is being made.

NOTE: The import dialog may not fully display on smaller screens. You may need to resize the window to see everything and proceed through the import process.

Auto Resolution

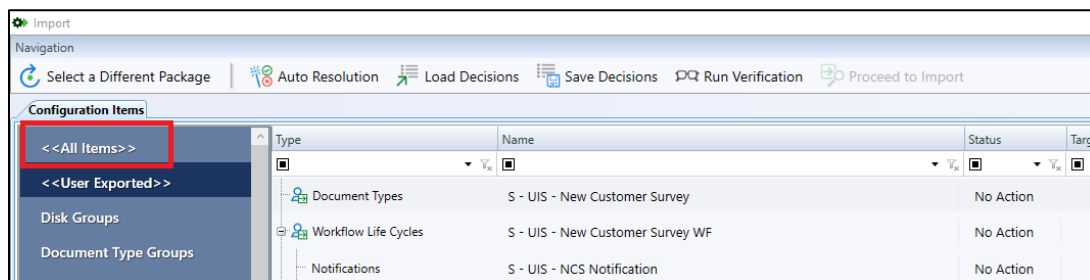
The “Automatically Resolve All Items” function can be used to apply a resolution to all items in the import file quickly.



- This will map all items that can be mapped to existing items (based on having the same name) and create any items that do not exist (as long as the “**Create Unmatched Items**” option is selected).

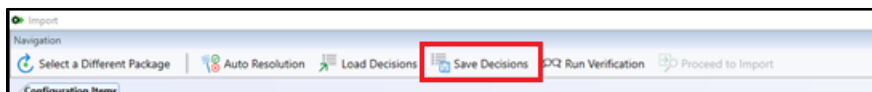
- If you select the “**Override Existing Actions**” option, any resolutions you have already applied manually will be replaced with the resolution chosen by the auto resolution function.
- The **Auto Resolve Using Previous Decisions** option will attempt to reference previous resolutions for more customized mapping. **Auto Resolve Using Item Names Only** will map in the same way as older versions (18 and earlier) based on items with matching names.

After using this option, verify that all items are resolved as desired and change any resolutions as needed. By default, you may only see the list of “<<User Exported items>>”, make sure you review **everything** by choosing “<<All Items>>” or reviewing each category.



Load/Save Decisions

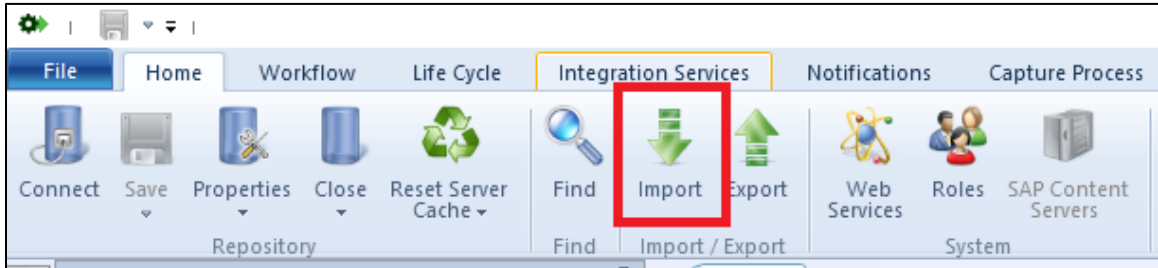
You can save the selected resolutions to a file to use the same choices for an import to another environment. This can be helpful if you are importing to STG as a test if you save the resolutions. If the import is successful, you can then use the resolution file for the PRD import to be sure your import will be processed the same way.



Importing in Studio

In Studio, items that are password protected cannot be exported or replaced. The password protection will need to be removed prior to migration. Items will need to be checked in before they can be replaced in the destination environment.

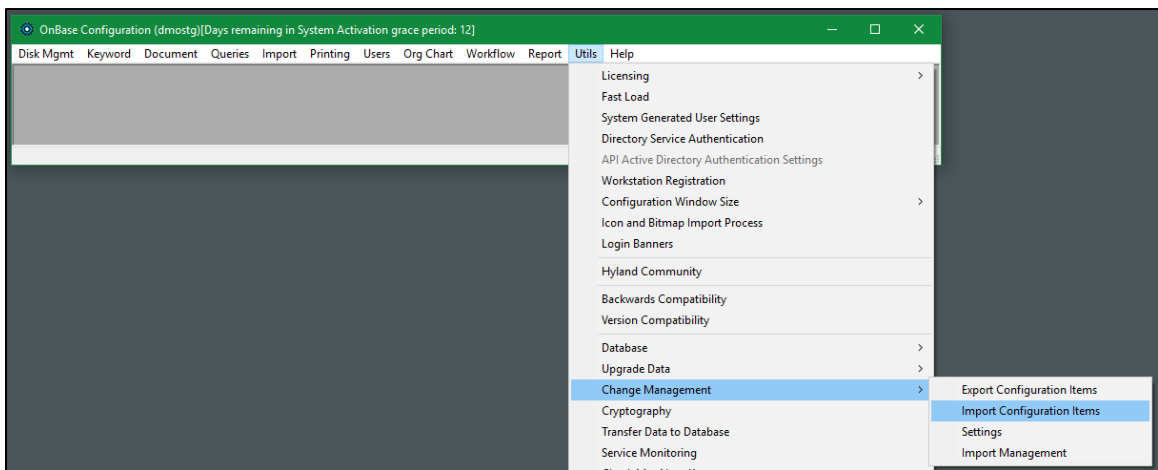
1. Open OnBase Studio and connect to the environment you want to import to. Once you are logged in, click the **Import** button on the Home tab of the menu ribbon.



2. Proceed with [common steps outlined here](#).

Importing in the Configuration Client

1. Open the Configuration client of the environment you want to import to. Once logged in, go **Utils > Change Control > Import Configuration Items**.

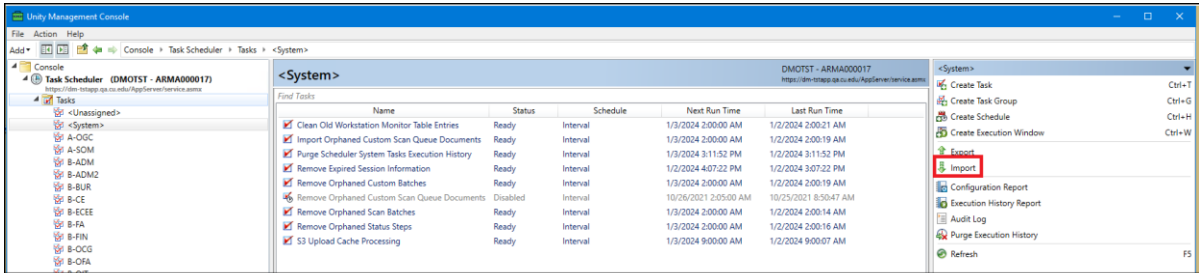


2. Proceed with [common steps outlined here](#).

Importing in Unity Management Console (Scheduler Tasks for Workflow Timers, etc.)

This migration can and will typically be done using Configuration or Studio, but can also be done within Unity Management Console (UMC). For more information, refer to the Unity Scheduler MRG.

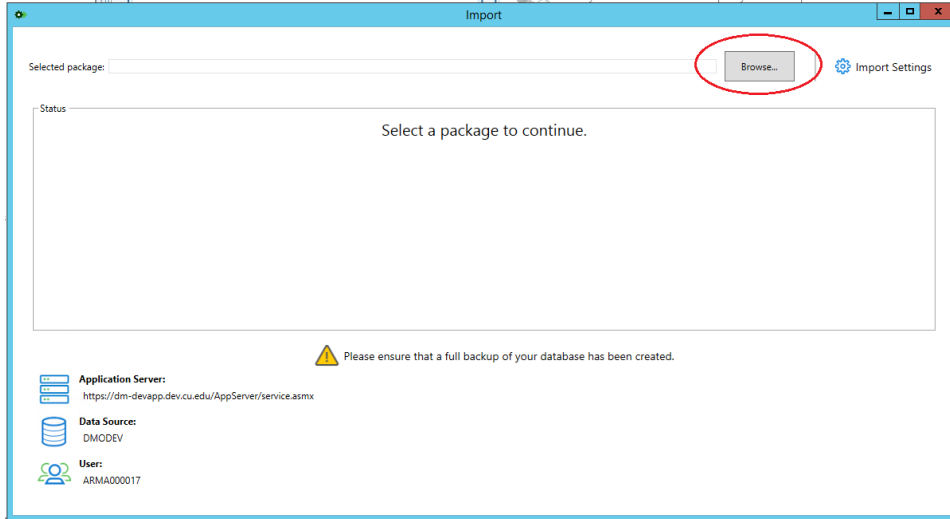
1. Open UMC and connect to the applicable environment.
2. Choose Import from the menu on the right side.



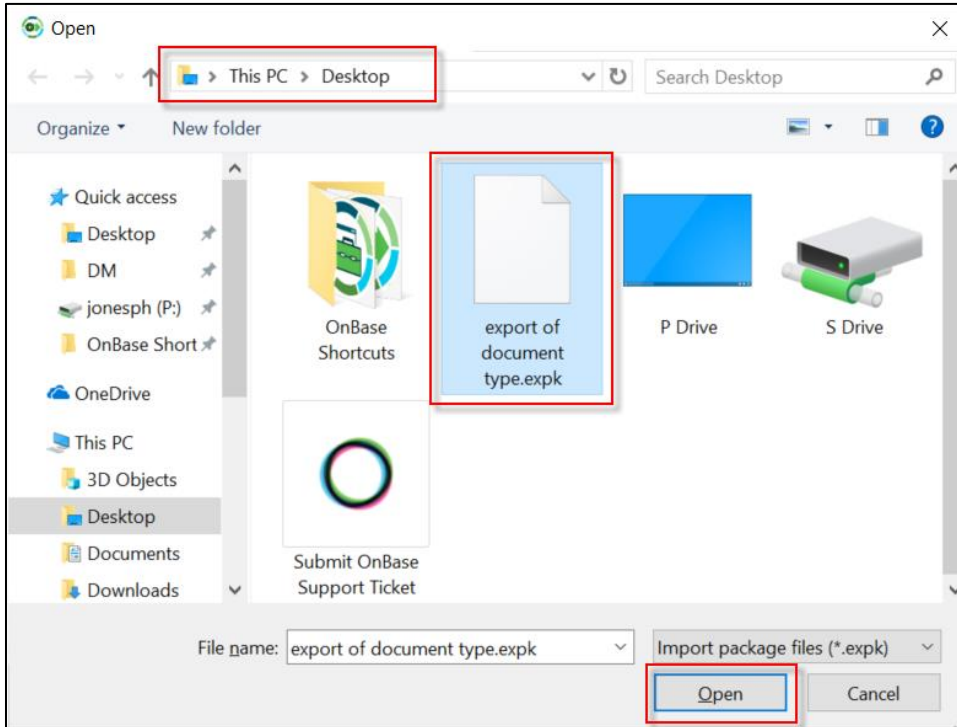
3. Proceed with [common steps outlined here](#).

Common Import Steps for Studio, Configuration and UMC

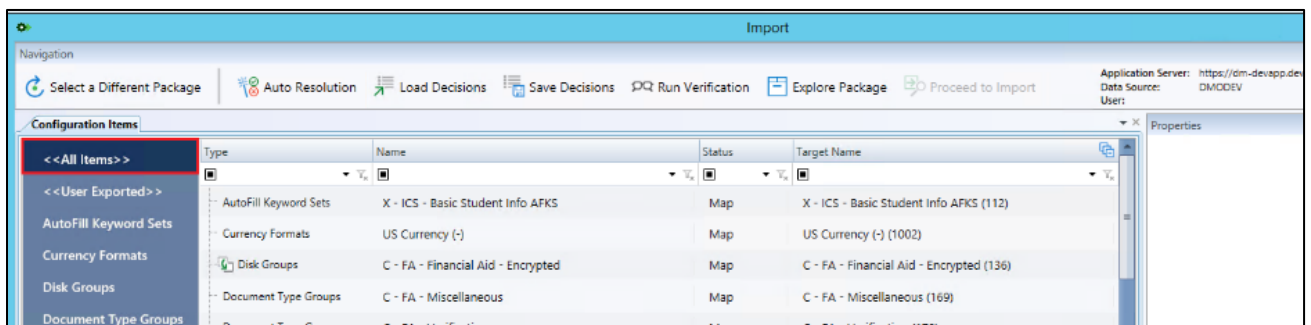
1. Click the **Browse** button in the upper right hand side of the window that appears.



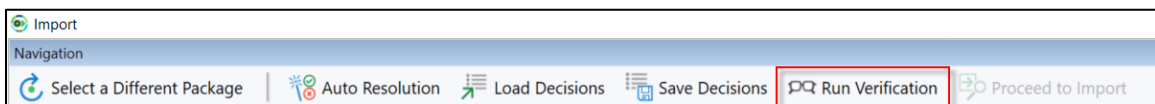
2. Navigate to the location where you saved your export package. Select the package and click **Open**. If you get a message that the file does not exist, this may be due to a file path that is too long. Try moving the file to a location with a shorter path, such as your Desktop.



- You will be presented with a screen showing the items you manually exported. Each item associated with the export file needs to be resolved, even items that were not explicitly exported but were identified with references from the exported items. Use [Auto Resolution](#) if desired and review **all actions** that will be performed by the import process by choosing “<<All Items>>”.

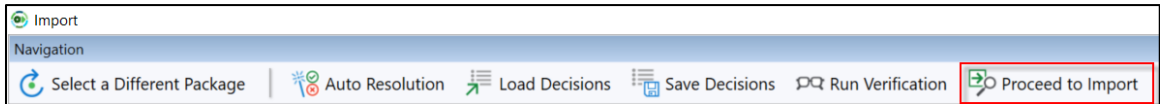


- Click **Run Verification** at the top of your screen. This will evaluate the resolution decisions made to ensure the import will be successful.



The verification process may generate errors and/or warnings. Please review these and resolve them as necessary. If there are any errors present, you will not be able to complete the import process. You CAN complete the import process with warnings present, but you should resolve them if able or verify functionality/configuration after the import is complete.

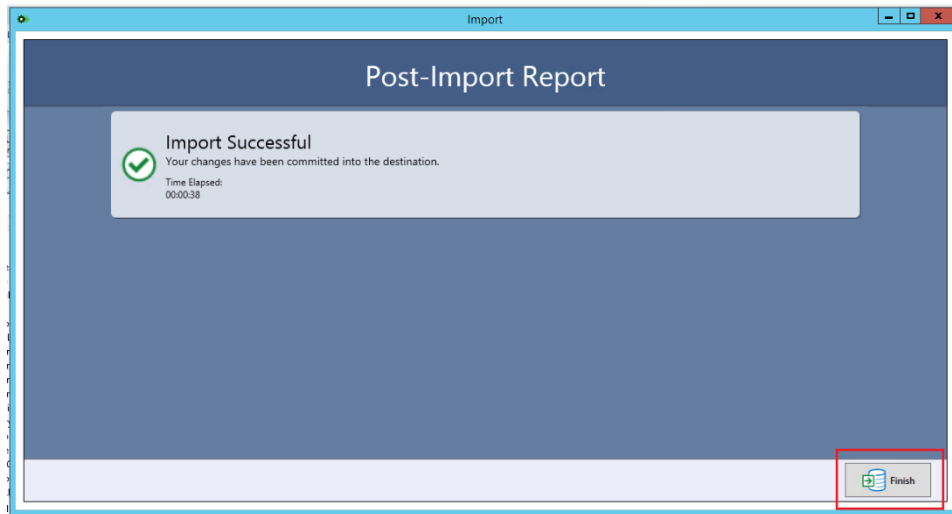
5. Once you successfully run the verification, you can click the **Proceed to Import** button.



6. You are presented with a final summary of your import for review. Once you are satisfied with the import, you can click the **Start Import** button in the bottom right corner of the window.



7. The import should be successful. If so, click the **Finish** button in the lower right corner of the screen.

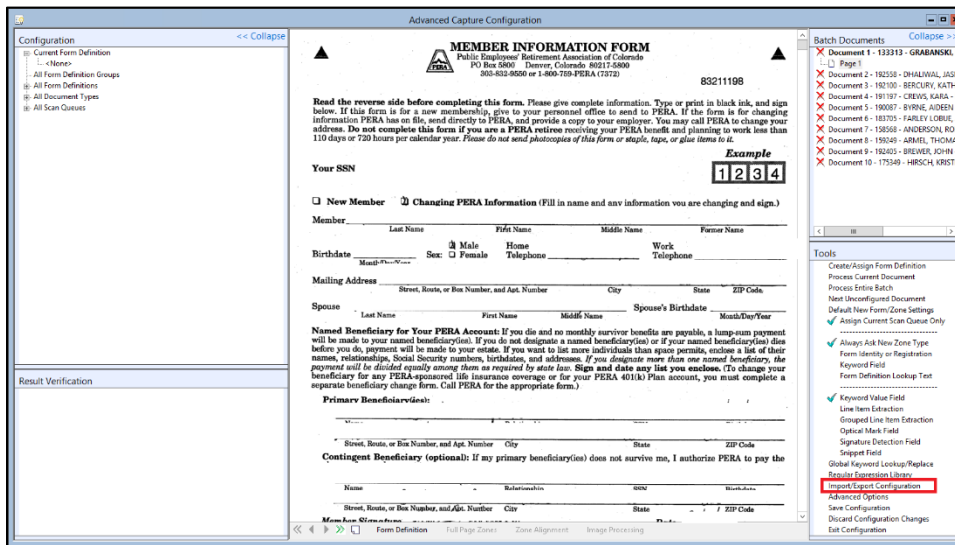


If the import was partially successful, make a note (or take a screenshot) of the message displayed and make any necessary corrections manually.

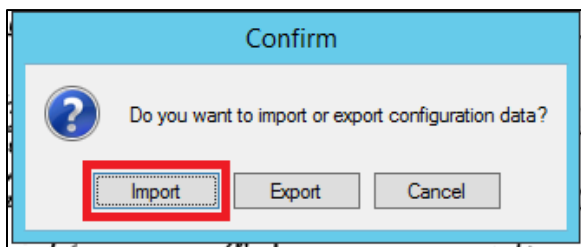
Importing in the Thick Client (Advanced Capture Templates)

This will only be available at workstations licensed for Advanced Capture. Refer to *Importing/Exporting Advanced Capture Forms* in the Advanced Capture MRG for more details.

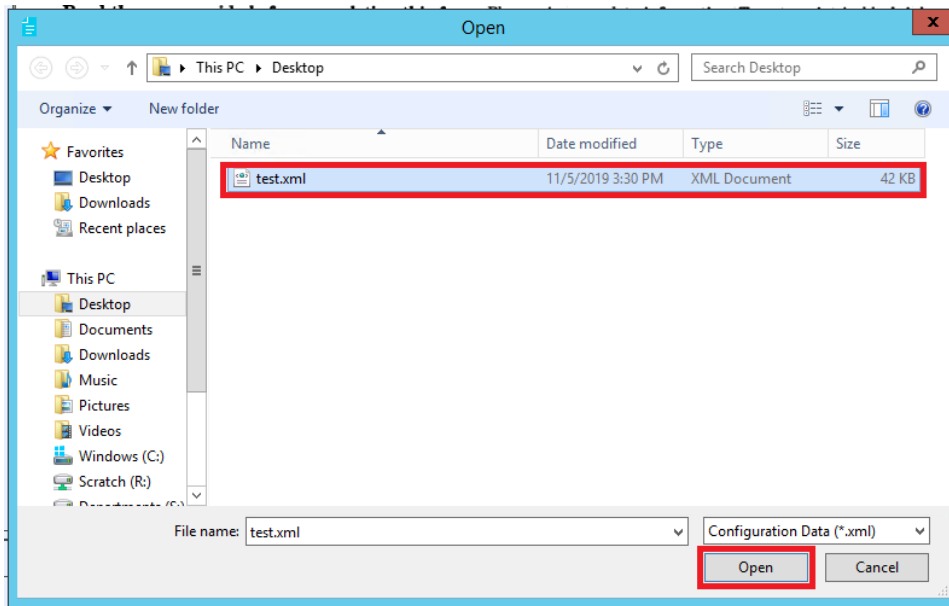
1. Open the thick client in the environment you want to export from (the source environment).
2. Navigate to **Advanced Capture Configuration** in the **Admin** menu.
3. Open an advanced capture template. In the lower right corner, select **Import/Export Configuration** in the Tools section.



4. Chose Import.



5. Navigate to the location where the file was saved. Select it and click Open.



6. Choose the templates to import using the checkboxes.

- *Load Balancing Rules* need to be verified in Studio. If new user groups are involved, the rules will need to be reconfigured.
- *Static email addresses* and *user account recipients* in workflow notifications need to be reconfigured in Studio.
 - Creating users for the email addresses and configuring the notification to send to that user account can help mitigate this, but some issues have been identified with that option as well, so it's best to check recipients either way. See [Workflow Notifications in the Handbook](#).
 - A reporting dashboard listing all templates and their recipients is available to assist.

Unity Forms

- Verify custom actions, especially any involving modified/newly-created workflow queues.
 - Open the form in the Form Designer (Unity client) and publish or test drive to ensure that no custom action error messages are displayed.
- Verify non-keyword data sets have all expected values.

Users & Groups

- *User Groups* get migrated but are not populated with users.

Unity Scripts

- When a new revision of a Unity script is imported (replacing a previous revision), the active version is not set to the new revision.
 - If you have the necessary privileges, you will need to update that. Otherwise, notify the UIS team to update the active version.
 - You can verify if there is an issue on the *OnBase SV General Issues* dashboard.

Anything that is environment-specific will need reconfiguration.

For example:

- *Actions using "Export to Network Location"* will need to have the file path updated if exporting to an environment-specific location not based on the Environment Variable. Refer to UIS's [Export to Network Location documentation](#) for file paths for each environment. Refer to UIS's [How to Use the Read Environment Variable Script documentation](#) for instructions on configuring the workflow to use the correct file path for the current environment to avoid needing to update this after migration.



Migrating WorkView

When migrating projects involving WorkView, please keep in mind that an app server cache reset is not sufficient for changes to be available in the clients. An app pool recycle is also needed (these are scheduled for every morning).

Refer to the [WorkView Configuration Guide](#) for more information on configuring WorkView and the [Expectations and Tips for Admins](#) for more information on app server cache resets and app pool recycles.

While WorkView applications can be migrated normally, certain items require extra care.

It is recommended (generally, but **especially** for WorkView) that you first migrate to STG or another non-prod environment to ensure the migration is successful before migrating to PRD.

Reporting Items (module associations and data providers using those module associations)

- After migrating the application, wait for the app pool recycle (the next day) and re-create the module association and data provider in the new environment. This will require another app pool recycle before these items can be used in the client. Then, you can migrate the reporting dashboards/reports and map to the re-created data provider.
- If any filters referenced by module associations are replaced (rather than mapped) this may break the reference and require re-creating the module association and any related data providers.
- Currently, if module associations/data providers are migrated from non-production where the filters/attributes do not already exist to be referenced by the import, the same attribute IDs are used in PRD as in TST but those IDs will not match between environments.

External classes cannot be replaced, they need to be mapped (you can still replace child items like filters/views). If creating an external class in a new environment, you will need to update the connection information (ex. in DMOTST an external class may reference ICSTST and need to be updated in DMOPRD to reference ICSPRD).

Even if your migration only references external classes through mapping, you may need to reconfigure the connections for those external classes. Saving that updated connection information does NOT require an app server cache reset.

Replacement in a migration will not apply to the following:

- Data type changes (ex. alphanumeric to integer)
- Class names (display name will update but not the class name)
- Changes to attribute size/length (even if shown in Studio, the database isn't updated so this need to be done manually)
- Removal of attributes/filters/etc.

