



OnBase Guide – Exporting and Importing Configurations

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

Complexity Level: Departmental Administrative Users

4/24/2025

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Background

As we work in a <u>multi-environment system</u>, 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'd create an export file and keep it for your records or re-import the configuration to the same environment after a refresh.

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 <u>application server cache reset</u> (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.





Incomplete/Unsuccessful Imports

In previous versions of OnBase, there was an option to "commit" or "revert" the changes the import made at the end of the process. This is no longer presented during the course of a normal import. If you encounter any errors or issues during a migration, please contact <u>UIS_DM_Support@cu.edu</u> for assistance.

In the event of an unsuccessful, incomplete import, you may see these Commit and Revert options. If you see these options, **do not use either of them**; contact <u>UIS_DM_Support@cu.edu</u> for assistance.

UIS monitors for any incomplete imports and will reach out to the user who initiated the import to investigate what went wrong.

If a cache reset occurs during an import, the import will be disrupted, so it's important to avoid resetting cache while an import is in progress.

At the end of an import, you should see a message that it's finished. An empty blue page like the one below is an indication of a **problem**. Contact UIS DM Support@cu.edu for assistance.



If there are warnings for a partially successful import, make note of what is listed and review the configuration is as you want it to be.



A common set of warnings will pertain to Unity Connection Strings (ex. OnBaseOdbcConnection) used in scripts. You can safely ignore those particular Environment Value warnings.

Environment Values

The following items have configuration that is specific to the source system. Additional configuration will be required after import

Item Type: Unity Connection Strings Item Name: OnBaseOdbcConnection Property Name: Unity Connection String

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 <u>dmptca@cu.edu</u> before starting and when you are done. Until you see that the last person is done, do not start an import! This applies 24/7.

Prerequisites

Depending on what type of configuration you are exporting/importing (refer to <u>Client</u> <u>Compatibility</u>), 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 <u>OnBase Client Guides</u> 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)



• <u>Workflow Developers Toolbox</u> (48 minutes)

Contact <u>UIS_DM_Support@cu.edu</u> 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					Х
AutoFill Keyword Sets		Х			
Bar Code Processes		Х			
Capture Process	Х	Х			
Cascading Data Sets		Х			
COLD Processors		Х			
Custom Queries		Х			
DIP		Х			
Document Composition	v	Y			
Templates	^	^			
DRIP		Х			
Document Types	Х	Х			
Folder Configuration	Х	Х			
Form Templates	Х	Х			
Item Generators/Sets	Х	Х			
Keyword Type Groups		Х			
Keyword Types		Х			
Mailbox Importer Accounts		Х			



Note Types		Х			
Notifications	Х	Х			
Packet Templates	Х	Х			
Portfolio Types/Relations	Х	Х			
Reporting Dashboards/Data Providers/Reports	х	х	X (with escalated privileges)		
Scan Queues	Х	Х			
Unity Form Themes	Х	Х			
Unity Scheduler Tasks	Х	Х		Х	
Unity Scripts	Х	Х			
User Groups		Х			
Workflow Life Cycles	Х	Х			
Workflow System Tasks	Х	Х			
WorkView Configuration	Х	Х			

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 (<u>see Before Proceeding</u>).



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 <u>uis_dm_support@cu.edu</u> 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 <u>common export steps</u>.

Exporting from the Configuration Client

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



0		OnBase C	onfigura	ition (D	MODEV)	Test S	ystem - N	ot For Pro	duction	Use			
Disk Mgmt	Keyword	Document	Queries	Import	Printing	Users	Org Chart	Workflow	Report	Utils	Help		
											Licensing	•	
											Fast Load		
											System Generated User Settings		
											Directory Service Authentication		
											IdP Authentication		
											API Active Directory Authentication Settings		
											Workstation Registration		
											Configuration Window Size	•	
											Icon and Bitmap Import Process		
											Login Banners		
											Hyland Community		
											Backwards Compatibility		
											Version Compatibility		
											Database	•	
											Upgrade Data	•	
											Change Control	•	Export Configuration Items
											Cryptography		Import Configuration Items
											Transfer Data to Database		Settings
											Service Monitoring		Import Management
											Check Max Num Keys		Test System Creation
											Check File Path Length		

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.

Unity Management Console							-		×	
File Action Help										
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😽 <system></system>	Clean Old Workstation Monitor Table Entries	Ready	Interval	1/3/2024 2:00:00 AM	1/2/2024 2:00:21 AM	By create schedule				
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Se B-OFA										

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.

Application Server: https://dm.devapp.dev.or. Data Source: DMODEV User: DMODEV DMODEV USER: DMODEV USER: DMOD		Export	_ D ×
• General Document Types Folder Note Type Folder Types Folder Types Form Templates Reading Groups Unity Form Themes • Capture Capture Process Scan Queues • Content Creation Document Composition OBBC Inputs Document Composition OBBC Inputs Document Composition Templates Notifications Print Formats + Healthcare FHIR Rend Points		Item Selection	Application Server: https://dm-devapp.dev.cu Data Source: DMODEV User:
General Document Types Folder Note Type Folder Templates Foder Types Form Templates Reading Groups Unity Form Themes Capture Capture Process Scan Queues Content Creation Document Composition ODBC Inputs Document Composition Templates Document Composition Templates Document Templates A Healthcare FHIR Rend Points FHIR Template FHIR Rend Points	م الله الم	٩	
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Storyboards v	Decument Composition ODBC Inputs Document Composition Templates Document Racket Templates Notifications Print Formats HIR Iden Points FHIR Xinen Types FHIR Template Storyboards		

3. 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.



	Item Selection	Application Server: Data Source: User:	https://dm-devapp.dev.c. DMODEV
	 - HR - COI Disclosure - HR - COVID-19 FFCRA Leave Request - HR - Faculty Pfedge - HR - High Kits Employee Disclosure - HR - High Kits Employee Disclosure - HR - New Employee Account Information Form - HR - Other Repartmental Access Request - HR - Other Pay Actions Checklist - HR - PMP - University Staff Eval - HR - SSA 1945 		

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

	Export	_ 0
	Item Selection	Application Server: https://dm-devapp.dev.cu Data Source: DMODEV User:
	Q, c - hr - C - HR - COI Disclosure C - HR - COI Disclosure C - HR - COI Disclosure C - HR - Acuty Pledge C - HR - New Employee Disclosure C - HR - SSA 1945	
FHIR Minne Types FHIR Template Storyboards	v	

- 5. 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.
- 6. Once complete, click **Save Package**.



[•	Export	_ 0 X
	Back to Item Selection	Export Results Application Serve Data Source: User:	r: https://dm-devapp.dev.cu DMODEV
		⊘ Export Successful	Time Elapsed: 00:00:05
	00 40 00		
			×
		Gancel Save Package	Customize Export

 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.

5	Advanced Capture Configuration	×
Configuration << Collapse III Curvet From Orhition III Curvet From Orhition Groups # All Form Definition Groups # All Source Ispen # All Source Ispen # All Source Uses	CONTRICT OF A DECEMPTION	Batch Documents Collapse ≥> ↓ Chesment 1: 13213 - GHARMSKI, ↓ Descrimer 2: 14253 - GHARMSKI, ↓ Descrimer 2: 14254 - ALREY, ALREY, ↓ Descrimer 2: 14254 - ALREY, ALREY, ↓ Descrimer 2: 14254 - ALREY, ALREY, ↓ Descrimer 2: 14254 - ALREY, ALREY, ALREY, ↓ Descrimer 2: 14254 - ALREY, HEAR ↓ Descrimer 2: 14254 - BLAREY, HEAR ↓ Descrimer 2: 14254 - BLAREY, HEAR
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	Primary BenediciaryClent: 1 Solid: Roma e Bin Number and Age Number Cip Contingent Benediciary (optional): If my primary benediciary(ise) does not survive me, I suthorize PERA to pay the Name Bolationality State 0000 Name Bolationality Manuface of the Number, stat Age Number Cip Team Orderation Team Orderation	Kyviod Vala Frild Line tem Existion Optical Nati Fried Signature Detection Field Signature Detection Field Singhet Field Obbit (Syvord Cockup/Replace Propular Comparison Liney Imput Linegure Comparison Singure Configuration Singure Configuration Singure Configuration Exit Configuration

4. Chose Export.



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



	Advanc	ed Capture Configuration	on Export	
Form ID	Form Definition Name	Scan Queue	Assigned Document Type	
✓ 102	B - BUR - Detail Financial Tra	<all></all>	B - BUR - Detail of Financial	
✓ 104	B - HR - Position Description	B - HR - Avature Scan Queue	B - HR - Position Description	
Select A	AII .			Deselect All
utput Configu	uration File:			Browse
Export	1			Cancel
Copon				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.

😂 Save As						×
\leftarrow \rightarrow \checkmark \uparrow	> This	sPC > Desktop >		~ Ū	Search Desktop	Q
Organize 👻 Ne	w folde	r			8=	- ?
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Desktop		🔊 OnBase DEV		3/4/2019 14:29	Internet Shortcut	1 K
Documents		🔊 OnBase PRD		3/4/2019 14:29	Internet Shortcut	1 K
Develoada		🔊 OnBase STG		3/4/2019 14:29	Internet Shortcut	1 K
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Pictures						
🚆 Videos						
🎬 Windows (C:)						
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🛖 Cross Departr	mei 🗸	<				>
File <u>n</u> ame:	Dashb	oard Export				~
Save as <u>t</u> ype:	Export	package files (*.expk)				~
∧ Hide Folders					Save	Cancel

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 <u>everything</u> 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").

🌣 Import			
Navigation			
💰 Select a Different Package 🛛 🌾	Auto Resolution 🚽 Load Decisi	ons 📴 Save Decisions 🕫 Run Verification 🦻 Proceed to Impor	t
Configuration Items			
< <all items="">></all>	Туре	Name	Status Targe
	• T _x	• T _x	• • T _x •
< <user exported="">></user>		S - UIS - New Customer Survey	No Action
Disk Groups	🖃 🔓 Workflow Life Cycles	S - UIS - New Customer Survey WF	No Action
Document Type Groups	Notifications	S - UIS - NCS Notification	No Action

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.



Г	Auto Posolution	
-	Coptions	
L	Create Unmatched Items	
	Override Existing Actions	
	O Auto Resolve Using Previous Decisions	
	Auto Resolve Using Item Names Only	
	Automatically Resolve All Items Please note, any decisions made by the auto resolve logic are only suggestions. Verify all decisions set before proceeding with the import.	Þţ

- 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 <u>everything</u> by choosing "<<All Items>>" or reviewing each category.

Import			
Navigation			
💰 Select a Different Package 🛛 🕴	🛞 Auto Resolution 🛛 着 Load D	ecisions 🛛 🗮 Save Decisions 🛛 🕫 Run Verification 📴 Proceed to	Import
Configuration Items			
< <all itams="">></all>	^ Туре	Name	Status Tarr
		· 7 _x	\bullet \mathbb{V}_{x}
< <user exported="">></user>	B Document Types	S - UIS - New Customer Survey	No Action
Disk Groups	P: 9 Workflow Life Cycler	S - LUS - New Curtomer Survey WE	No Action
Document Type Groups	Worknow Life Cycles	5 - 015 - New Customer Survey WF	NO ACION
	Notifications	S - UIS - NCS Notification	No Action

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.



 Import 					
Navigation					
👶 Select a Different Package	🔞 Auto Resolution	Load Decisions	Save Decisions	PR Run Verification	Proceed to Import
Configuration Items					

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

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

OnBase Configuration (dmostg)[Days remaining in System Activation grace period: 12]		-	×	
Disk Mgmt Keyword Document Queries Import Printing Users Org Chart W	/orkflow Report	Utils Help		
		Licensing	>	
		Fast Load	- 1	
		System Generated User Settings	- 1	
		Directory Service Authentication	_ I	
		API Active Directory Authentication Settings		J
		Workstation Registration		
		Configuration Window Size	>	
		Icon and Bitmap Import Process		
		Login Banners		
		Hyland Community		
		Backwards Compatibility		
		Version Compatibility		
		Database	>	
		Upgrade Data	>	
		Change Management	>	Export Configuration Items
		Cryptography		Import Configuration Items
		Transfer Data to Database		Settings
		Service Monitoring		Import Management



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.

Huby Management Console -								
ile Action Help								
Add 🕶 💽 1 🖛 📫 Console 🕨 Task Scheduler 🕨 Tasks 🕨	iad 🕶 🔢 💽 🏙 🏟 👘 Console > Task Scheduler > Tasks > <system></system>							
4 🛅 Console	(Custom)				DMOTST - ARMA000017	<system></system>	•	
4 (Task Scheduler (DMOTST - ARMA000017)	< system>				https://dm-tstapp.qa.cu.edu/AppServer/service.asmx	K Create Task	Ctrl+T	
Tasks	Find Tasks					- Create Task Group	Ctrl+G	
ge <unassigned></unassigned>	Name	Status	Schedule	Next Run Time	Last Run Time	A Create Schedule	ONL H	
😚 <system></system>	Clean Old Workstation Monitor Table Entries	Ready	Interval	1/3/2024 2:00:00 AM	1/2/2024 2:00:21 AM	IS create scriedule	Culture	
🚰 A-OGC	Market Companies Custom Scan Queue Documents	Ready	Interval	1/3/2024 2:00:00 AM	1/2/2024 2:00:19 AM	Create Execution Window	Ctri+W	
W A-SOM	Purge Scheduler System Tasks Execution History	Ready	Interval	1/3/2024 3:11:52 PM	1/2/2024 3:11:52 PM	The Export		
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SA B-ADM2	Remove Orphaned Custom Batches	Ready	Interval	1/3/2024 2:00:00 AM	1/2/2024 2:00:19 AM	Conferentian Derest		
Se B-CC	K Remove Orphaned Custom Scan Queue Documents	Disabled	Interval	10/26/2021 2:05:00 AM	10/25/2021 8:50:47 AM	Configuration Report		
Gr B-ECFE	Remove Orphaned Scan Batches	Ready	Interval	1/3/2024 2:00:00 AM	1/2/2024 2:00:14 AM	Execution History Report		
Set B-FA	Remove Ombaned Status Stens	Ready	Interval	1/3/2024 2:00:00 AM	1/2/2024 2:00-16 AM	🔠 Audit Log		
Sr B-FIN	S3 Unload Cache Processing	Ready	Interval	1/3/2024 9:00:00 AM	1/2/2024 9:00:07 AM	Repurge Execution History		
😸 B-OCG	a as options cause inclusing	(activity		TO A DOLLAR STOCIOU PAN	the same and set	@ Refresh	F5	
😵 B-OFA						e heilean		

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.



3. 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 <u>Auto Resolution</u> if desired and review <u>all actions</u> that will be performed by the import process by choosing "<<All Items>>".

_						
	•			Impor	t	
	Navigation					
	💰 Select a Different Package	e 🛛 🏀 Auto Resolution	Load Decisions	🕫 Run Verification	Explore Package Proceed to Import	Application Server: https://dm-devapp.dev Data Source: DMODEV User:
	Configuration Items					Properties
	<< All Itome>>	Туре	Name	Status	Target Name	G
	S SAULITERIISZZ	• v _x		• V _x 🔳 • V		• T _R
	< <user exported="">></user>	- AutoFill Keyword Sets	X - ICS - Basic Student Info AFKS	Мар	X - ICS - Basic Student Info AFKS (112)	
	AutoFill Keyword Sets	Currency Formats	US Currency (-)	Мар	US Currency (-) (1002)	=
	Currency Formats	Disk Groups	C - FA - Financial Aid - Encrypted	Map	C - FA - Financial Aid - Encrypted (136)	
	Disk Groups	- Document Type Groups	C - FA - Miscellaneous	Мар	C - FA - Miscellaneous (169)	
1	Document Type Groups					

4. 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.

Import					
Navigation					
Select a Different Package	Kato Resolution	Load Decisions	Save Decisions	PC Run Verification	Proceed to Import

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.

Import		-	σ	×
	Pre-Import Report			
	At a Glance			<
	Statistics			
	Items Created: 10			
	Items Replaced: 0			
	Items Mapped: 98			
	Items Ignored: 0			
		-		
	Items Created			
	Form Templates	<u>^</u>		
	S - UIS - Unity script test			
	Notifications			
	S - UIS - Test			
	Workflow Life Cycle: Artions			
	set CAMPUS code prop			
	set VariableInputType prop			
	unity script			
	WorkFlow Notification			
				~
Back to D	ecisions	🗐 Sta	rt Import	

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.

If you do not see any contents in the post-import report, this indicates a problem; contact <u>UIS_DM_Support@cu.edu</u>.

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.



	Advanced Capture Configuration	= • ×
Configuration << Collapse © Current Form Definition 	MEMBER INFORMATION FORM Halk Engineer Baitmans Association of Colorado DO Res 5600 Perce Coloredo 6017-800 DO Res 5600 Perce Coloredo 6017-800 DO Res 5600 Perce Coloredo 6017-800 B32211198 B32211198	Batch Documents Collapse >> X Document 1 - 133313 - GRABANSKI, I L.] Page 1 X Document 2 - 192558 - DHALIWAL, JASH X Document 3 - 192100 - BERCURY, KATH X Document 4 - 191927 - CREVS, KARA -
it: All Scan Qurues	Read the reverse side hoffsee completing this form. Please give complete information. Types or print in black its, and sign below. It this form is for a new mean membrylic, give to your promoted effice to ead to PRRA. It the form is for changing address. Do not complete this form if by a PRA to the provide s copy to your supplyor. You may call PfRA to change your address. Do not complete this form if by a PRA to the provide s copy to your supplyor. You may call PfRA to change your address. Do not complete this form if by a PRA to the provide state of this form or staple, tape, or give items to it. 110 days or 720 hours per calendar your. France do not and photocopies of this form or staple, tape, or give items to it. Example	Document 5 - 190087 - BYRNE, AIDEEN - Document 6 - 183705 - FARLEY LOBUE, , Document 7 - 158568 - ANDERSON, ROE Document 8 - 159249 - ARMEI, THOMA Document 9 - 192405 - BREWER, JOHN - Document 10 - 173349 - HIRSCH (KBSTE
	Your SSN 11234	1
	Birthdata 0 Mala Home Telephone Telephone	Tools Create/Assign Form Definition Process Current Document
	Specie Space Specie Specie </th <th>Process Entire Batch Next Unconfigured Document Default New Form/Zone Settings Assign Current Scan Queue Only</th>	Process Entire Batch Next Unconfigured Document Default New Form/Zone Settings Assign Current Scan Queue Only
Result Verification	will be made to your named bandfaryclau. If you do not dongrade a named bandfaryclau of your named bandfaryclau dia before you do, popenst will be made do your entate. If you and to list more individual than a your permits, enclose a list of their names, relationships, Social Social's manibras, includation, and addresses. If you dongrade more than one anomed bandfary, the poynent will be discided equally anomed times any required bards in as. Sign and date any tist you enables. To change your beneficiary for any PERA-sponsered life insurance overage or for your PERA 401(k) Plan account, you must complete a separate bandfaring change france. LifeRA for the appropriate form.)	 Always Ask New Zone Type Form Identity or Registration Keyword Field Form Definition Lookup Text
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	Momenta Construction Construction	Discard Configuration Changes Exit Configuration

4. Chose Import.



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

1	Open				x
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Organize 🔻 New folder			:==	•	0
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Desktop	ា test.xml	11/5/2019 3:30 PM	XML Document	42 k	В
Downloads Recent places					
🌉 This PC 🗮					
📔 Desktop					
Documents					
Downloads					
Pictures					
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indows (C:)					
Scratch (R:)					
File name:	test yml		Configuration Data	(*.xml)	¥
The name.	CSUATH	•	Open	Cancel	

6. Choose the templates to import using the checkboxes.



Adv	Advanced Capture Configuration Import					
Created by MANAGER on workstation QDMOSTGPROC01 (AUTO) at 2019-11-05 15:30:26 Source database DMOSTG using schema version 3.5-421 and system install ID CUPB						
Form Definition Name	Needs Reconciliation	Already Exists in Database				
Global Configuration Objects>	NO	N/A				
B - BUR - Detail Financial Transactions	NO	YES				
B - HR - Position Description	NO	YES				
Select All		Deselect All				
Import		Cancel				

7. Click Import.

Importing in the Unity Client (Reporting Dashboards)

This requires escalated privileges, typically reporting dashboard configuration migration will be done in Configuration or Studio.

Post Import Items to Manually Configure or Check

Once you've competed your import, there are a few items that will have to be manually configured or checked as they cannot be migrated or may not migrate correctly.

Document Types & Keywords

 Keyword Data Sets are clearing and need to be repopulated. This can be done by importing a text file to either merge with or replace an existing data set. Go to Keyword > Keyword Types in the Configuration client, select the desired keyword type and click Data Sets. Then use the import button to import the list of values.

Workflow

 When connected to both the source and destination environment in Studio, you can compare life cycles to find any differences. This can help identify any configuration that was not migrated correctly. Right click the life cycle in one environment and choose **Compare To**. In the window that opens, choose the other environment then select the equivalent life cycle from the list.



- 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 <u>Workflow Notifications in the Handbook</u>.
 - A reporting dashboard listing all templates and their recipients is available to assist.
- Run the *Workflow Doctor* to see if any issues are identified if references are missing from your new configuration.

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 <u>How to Use</u> 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 <u>WorkView Configuration Guide</u> for more information on configuring WorkView and the <u>Expectations and Tips for Admins</u> 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 nonproduction 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.

