University of Colorado
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OnBase by Hyland

OnBase Guide – Exporting and Importing Configurations

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

Complexity Level: Departmental Administrative Users

10/24/2025

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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/DMOSTG/DMODEV) 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. Backing up items in development allows them to be imported back into the same 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.

As of **October 2025**, it is **required** that before migration to production, you first migrate to DMOSTG. 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 or issues related to the import process itself).

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 DMOSTG and import that file. Then after confirming success, you can import the same file to DMOPRD with coordination with UIS on timing.

While other department's configuration items may be identified in the export process, be sure to **only create or modify your department's items** in the destination environment when performing your input. If necessary, you can resolve other items as "no action" or "map". Do not "create" or "replace" other department's items. Make sure you review the resolutions assigned for "**all items**" and not just "user exported items" to ensure you are not having an impact on other departments' configuration. Once you've completed 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.

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.

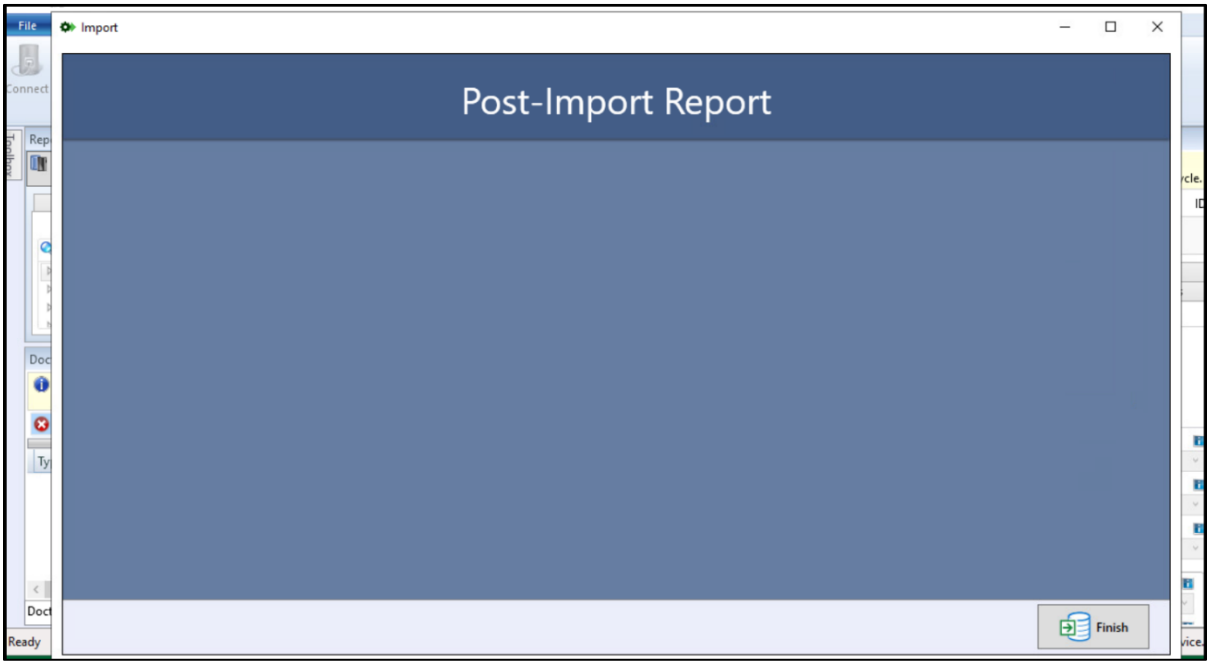
Incomplete/Unsuccessful Imports

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 UIS_DM_Support@cu.edu 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 UIS_DM_Support@cu.edu for assistance.

UIS monitors for any incomplete and reverted imports and will work with the user to investigate what went wrong.

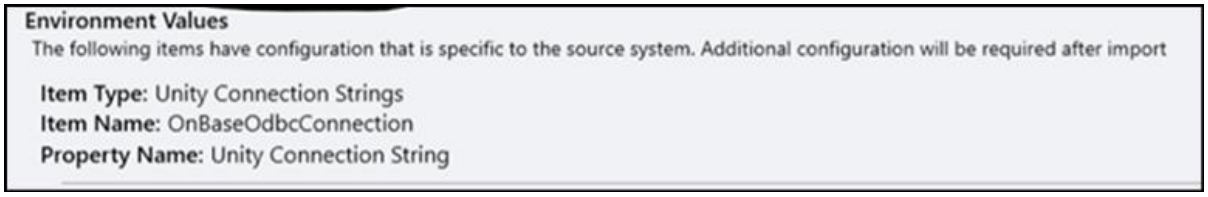
At the end of an import, you should see a message that it’s finished. An empty blue page like the one below is an indication of a **problem**. Contact UIS_DM_Support@cu.edu for assistance.



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

If you see any unusual or unexpected error messages, or see that an import failed, make note of those messages. Taking a screenshot is a simple way to document them so that they can be reviewed.

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.



Before Proceeding

A variety of situations cause conflicts in the data written to the configuration tables, which can lead to **data loss and loss of functionality**. A warning may 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.

As of November 2025, for all imports to production, schedule an import timeslot using Calendly, after you've tested the import to DMOSTG. A member of the UIS team must be available to monitor for any issues arising during an import. **This applies 24/7 for production; all production imports must be scheduled.**

For non-production, you do not need to schedule, but please inform the dmptca@cu.edu distribution list when you begin and finish an import, so that others do not begin an import or reset cache.

Simultaneous imports need to be avoided. UIS will ensure that production imports are not simultaneous through coordinating times to import. For non-production, check the app server cache reset dashboards to check for recent import activity. This dashboard is available in Unity and Web clients in all environments

- OnBase App Server Cache Resets TST
- OnBase App Server Cache Resets STG

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. Check the dashboard before resetting cache in non-production (no resets should occur in production without consulting UIS).

Also, old export files created in prior OnBase versions have resulted in data loss from multiple tables when the import failed. The database can be significantly different between versions, so export files from an old version should not be used.

Keep in mind, most changes require an application server cache reset (or even an app pool recycle). 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. so consider this when timing your imports.

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.

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. Fix any errors or warnings that are identified. See the *Workflow Doctor* section (page 368) in the Workflow MRG for more information.

Check for and resolve any issues related to the configuration in the System Monitoring application.

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 non-production**, **communicate** to the distribution list (see Before Proceeding).

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			

Exporting

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

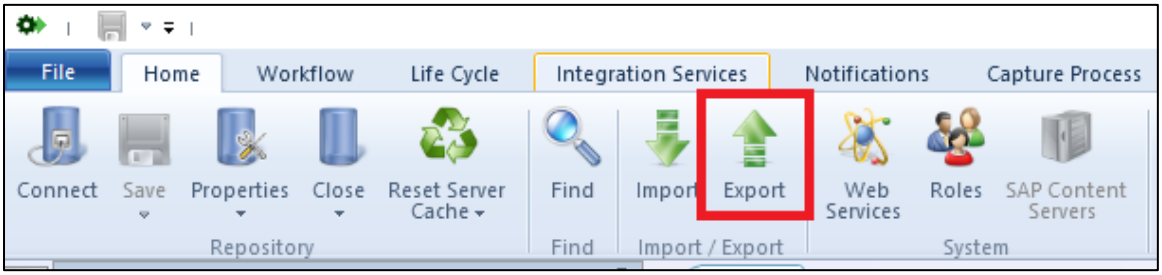
It can be helpful to have a consistent pattern to your file names (ex. XYZ WF - TST for PRD - 9-10-2020) so you can keep them if needed for future reference or to restore a previous version. A consistent way of naming your export files will make it easy to tell what's in each file.

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.

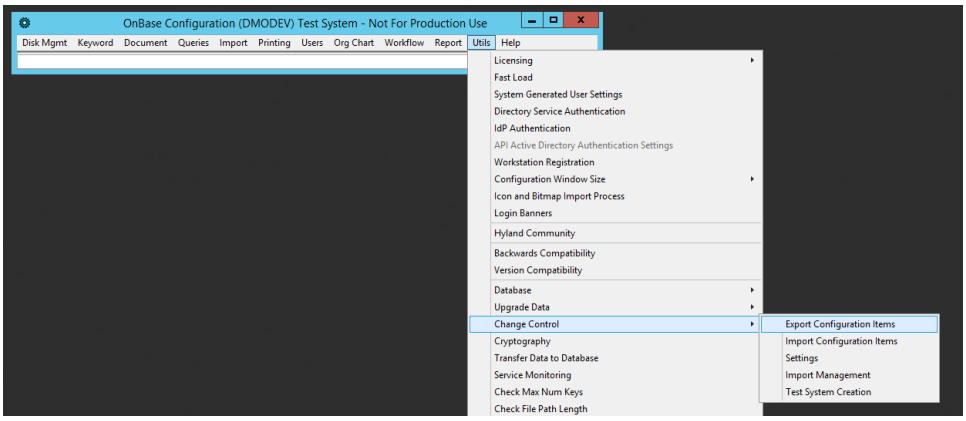
1. Open OnBase Studio and connect to the environment you want to export from. Once you are logged in, click the **Export** button on the Home tab of the menu ribbon.



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.

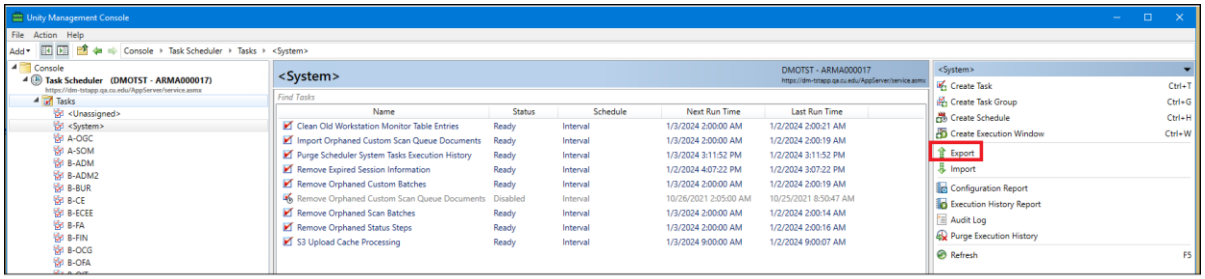


2. Proceed with common export steps.

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

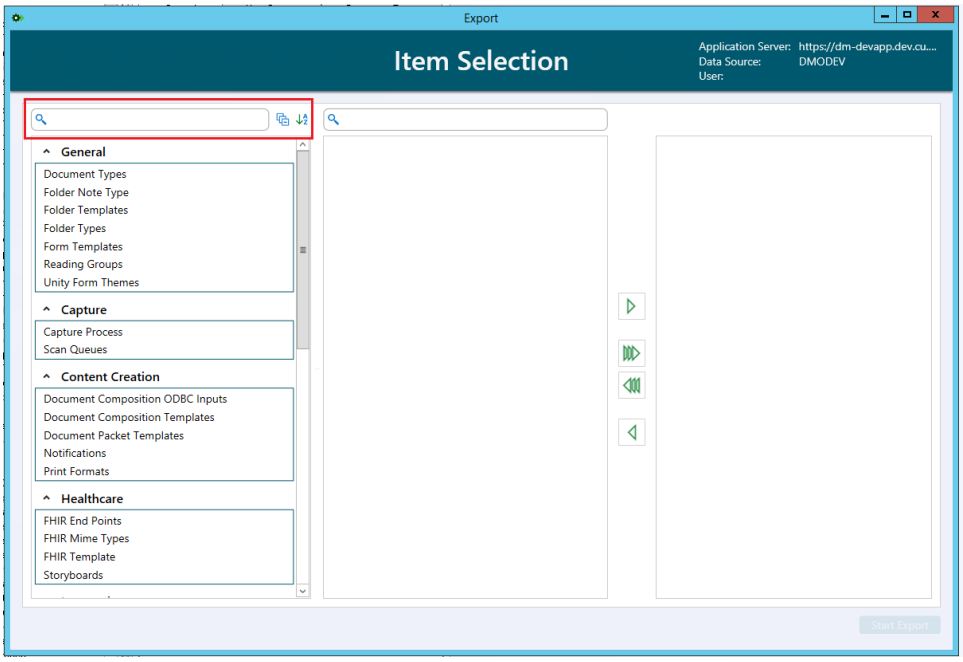
1. Verify the environment listed is correct.

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.

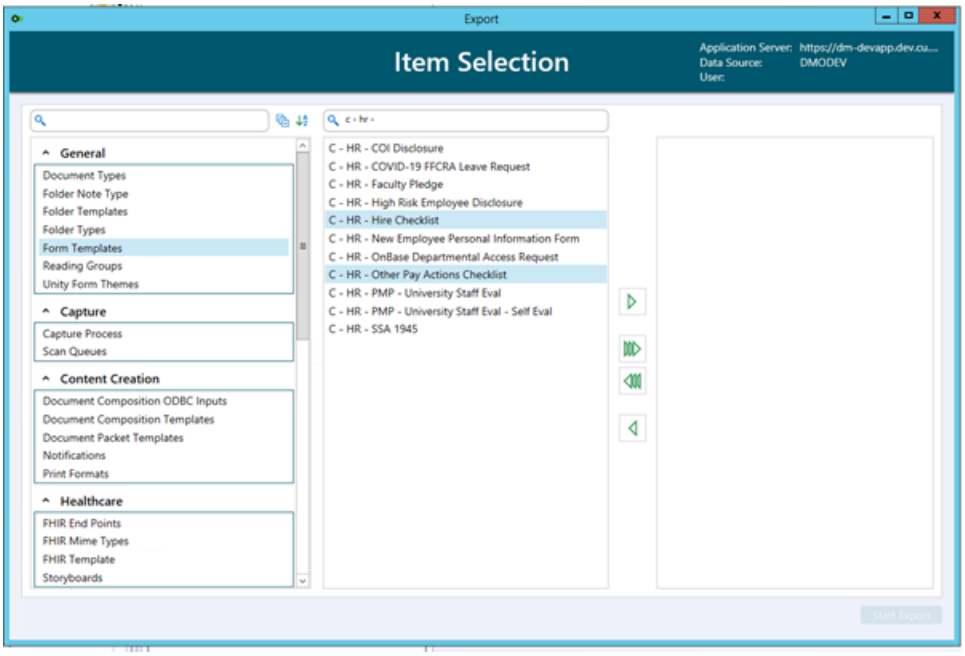
   NOTE: If you want to export multiple item types, you will need to select each type and then each item from that category, then select the next type/category.

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

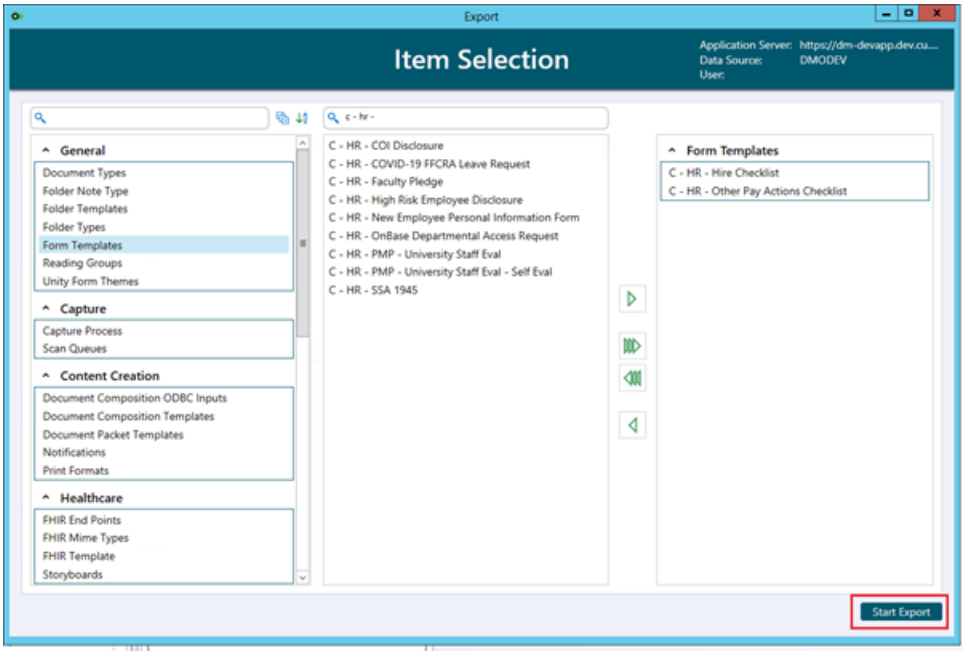


3. Once you select an item type, the available items of that type will appear in the middle column. Select the item(s) you want to export, and then click the button with the double left arrows to move the item from the “available” list to the “selected” list. Alternatively, you can double click the item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

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

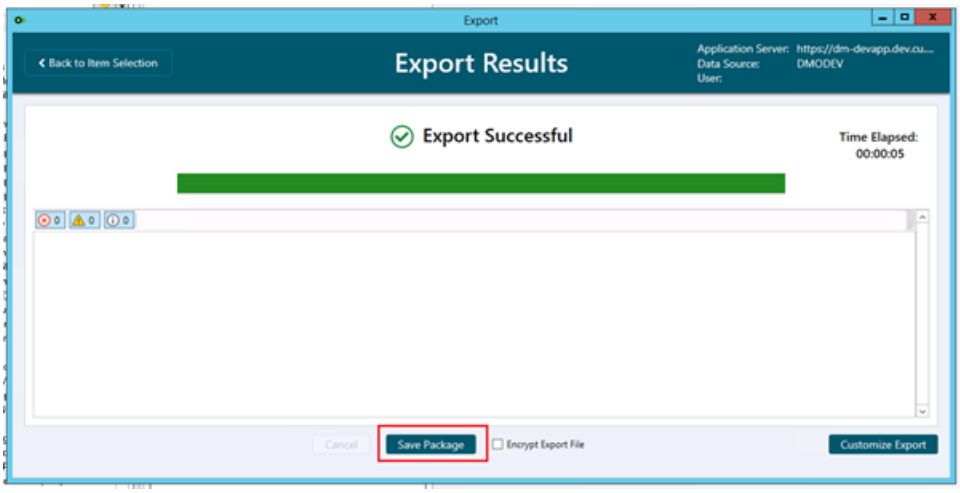


4. Once you have selected all the items you want to export and they are listed in the “Selected” box, click **Start Export**.

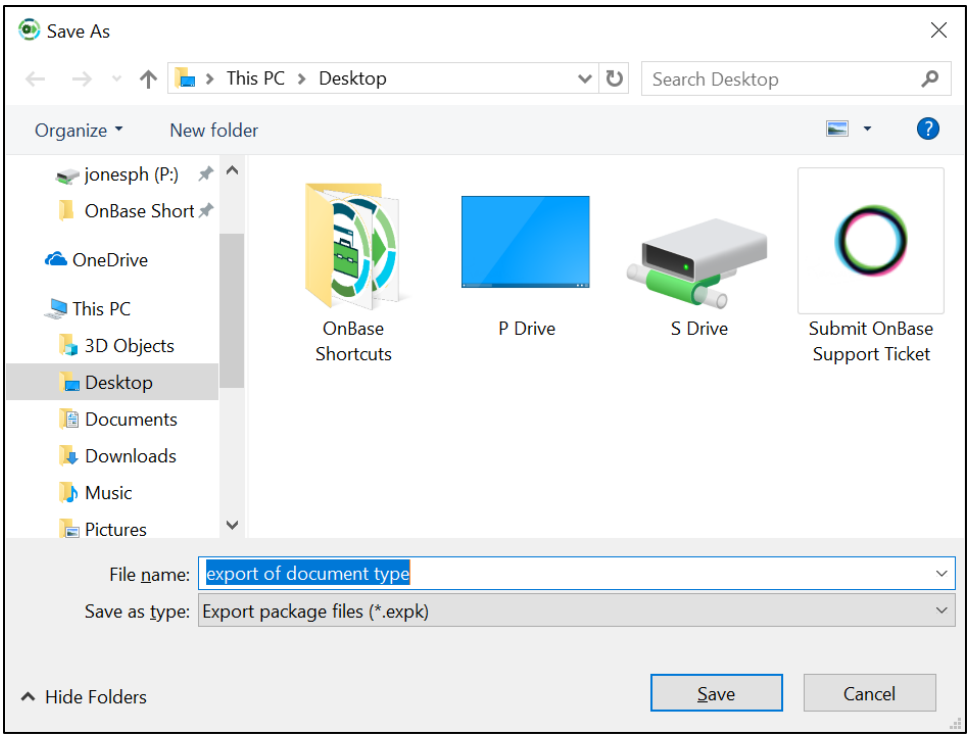


5. As the export is processed, you can view the progress and any warnings or errors. You are also given the option of encrypting your export by selecting the checkbox.

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



7. 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.

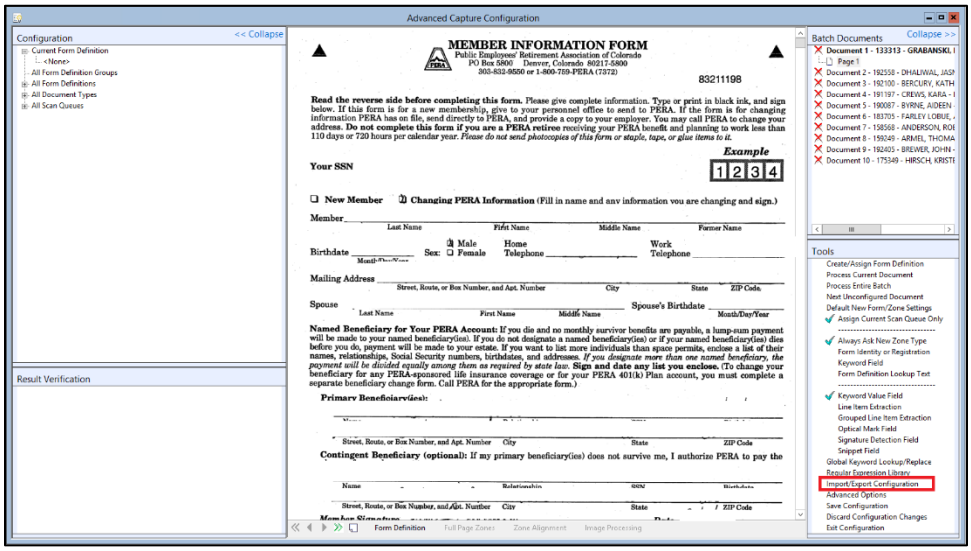
Exporting from the Thick Client (Advanced Capture Templates)

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.

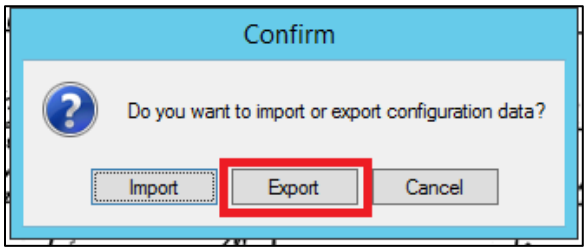
1. Open the thick client in the environment you want to export from (the source environment).

2. Navigate to **Advanced Capture Configuration** in the **Admin** menu.

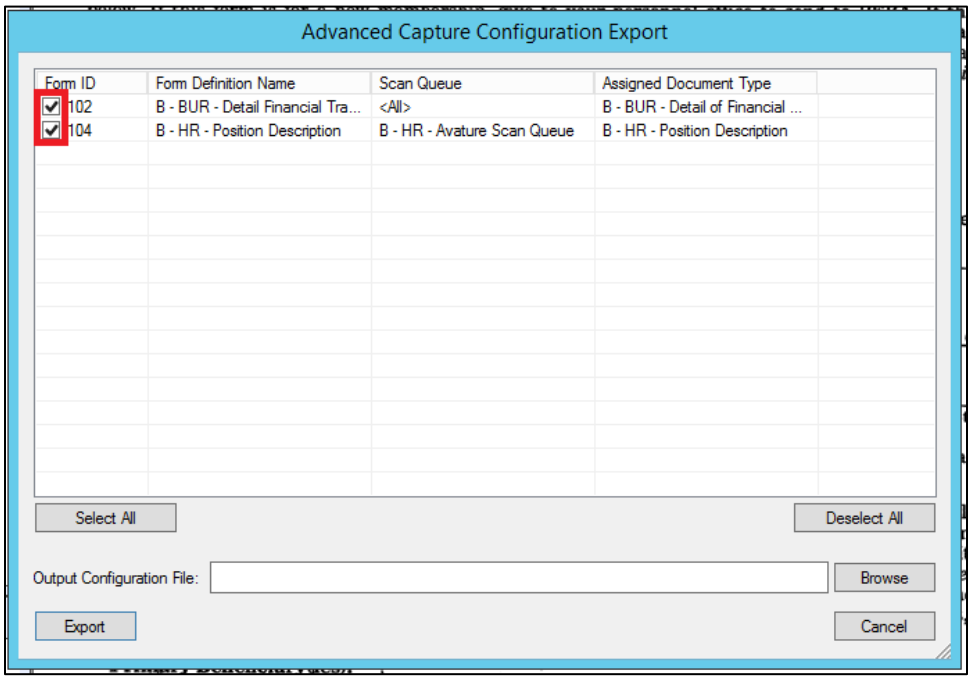
3. Open an advanced capture template. In the lower right corner, select **Import/Export Configuration** in the Tools section.



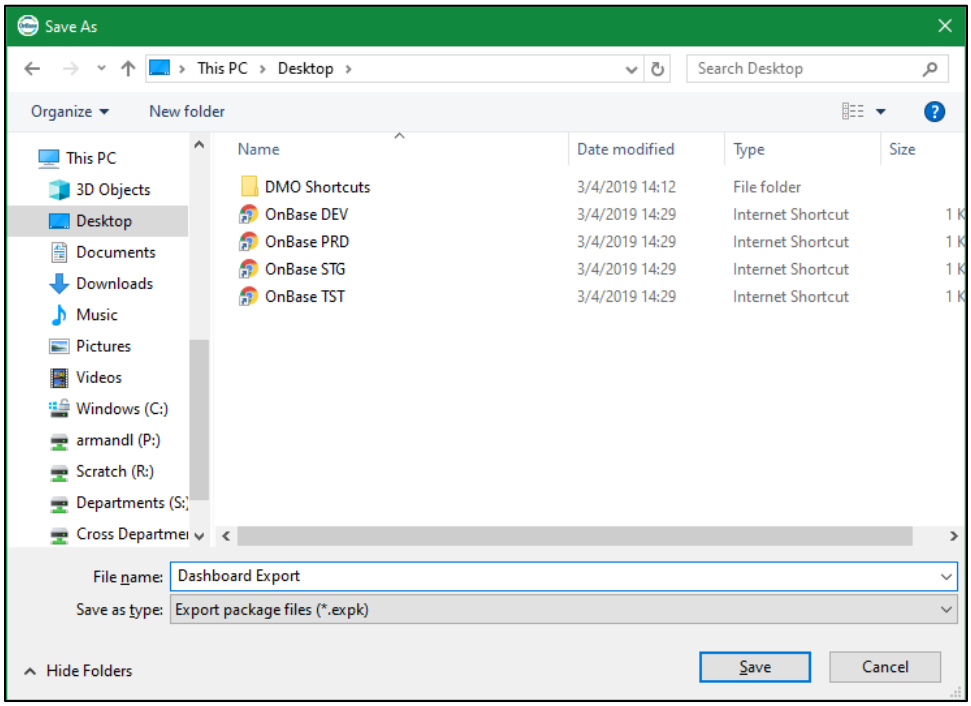
4. Chose **Export**.



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



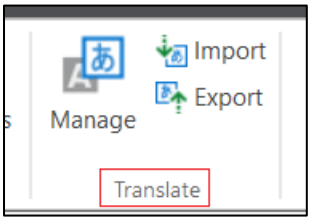
6. Click **Browse** to choose a location to save the export package, and name it appropriately. Then click **Save**. Typically, the ideal place to save it is on the desktop. Long file paths can prevent the file from being imported.



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.

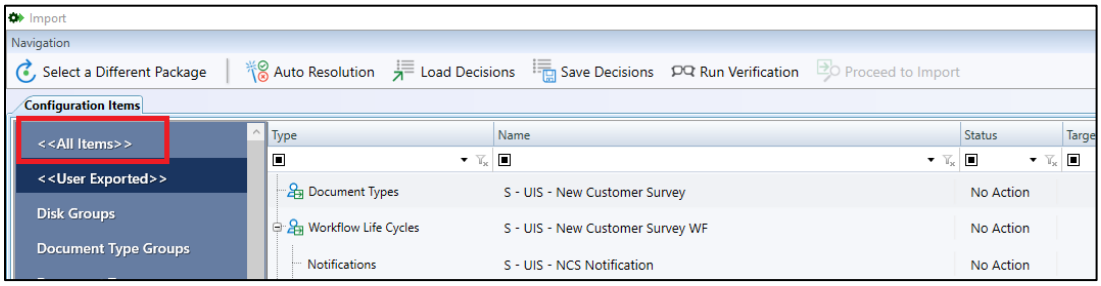
The resolution options are:

- **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").



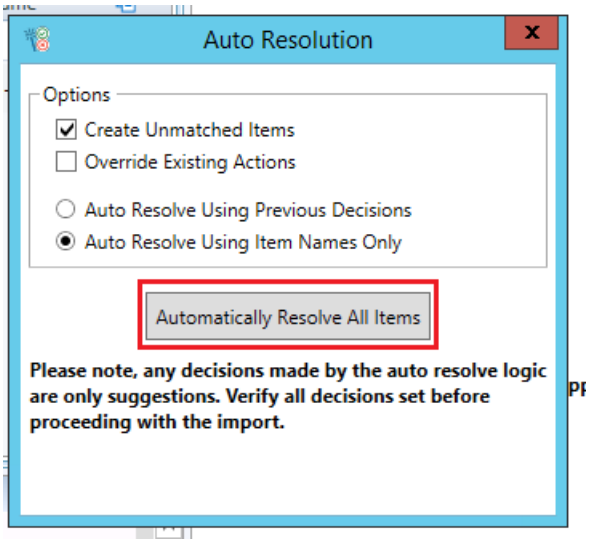
Multiple rows can be selected to change the resolution on many items at once.

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.

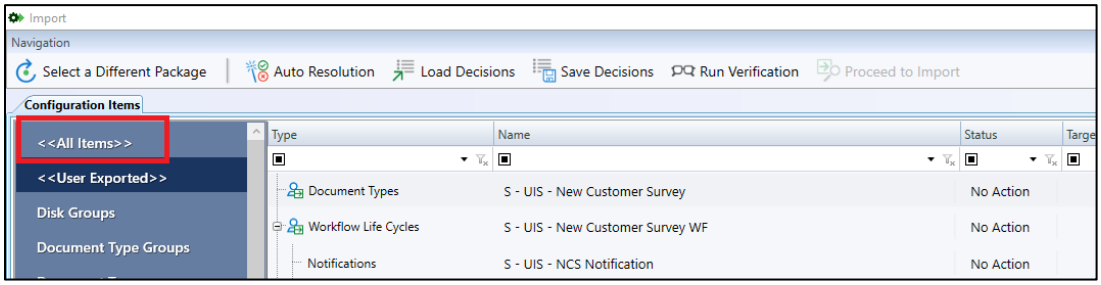
Auto Resolution

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



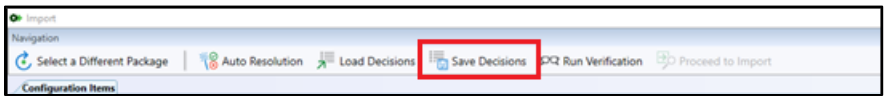
- This will map all items that can be mapped to existing items (based on having the same name) and create any items that do not exist (as long as the "**Create Unmatched Items**" option is selected).
- If you select the "**Override Existing Actions**" option, any resolutions you have already applied 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

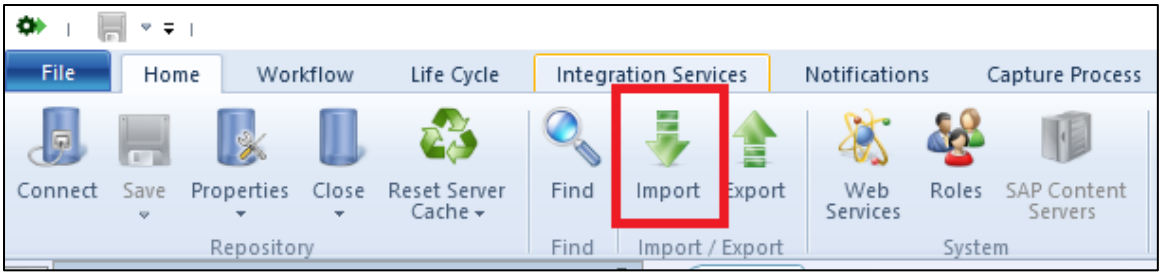
You can save the selected resolutions to a file to use the same choices for an import to another environment. This can be helpful if you are importing to STG as a test if you save the resolutions. If the import is successful, you can then use the resolution file for the PRD import to be sure your import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

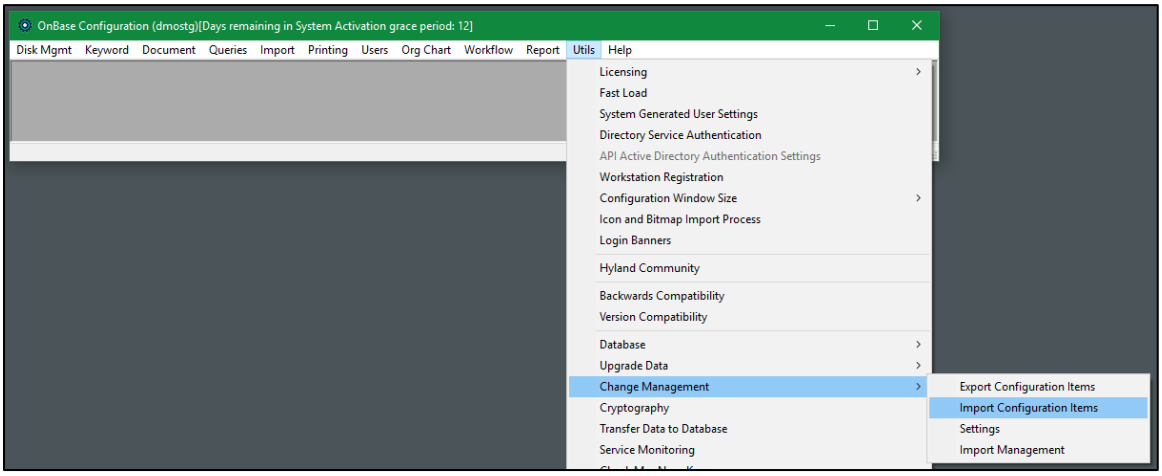
1. Open OnBase Studio and connect to the environment you want to import to. Once you are logged in, click the **Import** button on the Home tab of the menu ribbon.



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**.

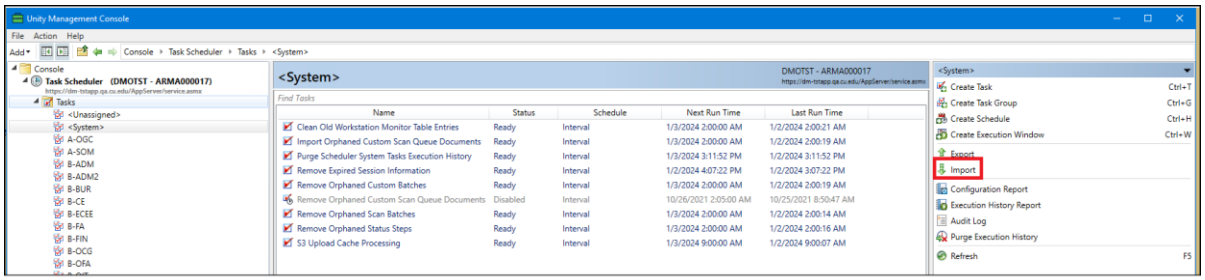


2. Proceed with common steps outlined here.

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.

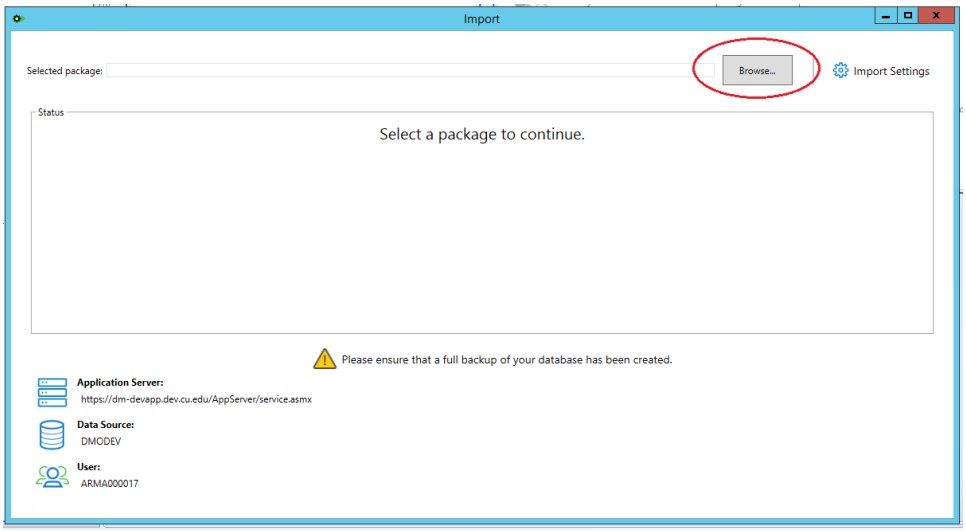
1. Open UMC and connect to the applicable environment.
2. Choose Import from the menu on the right side.



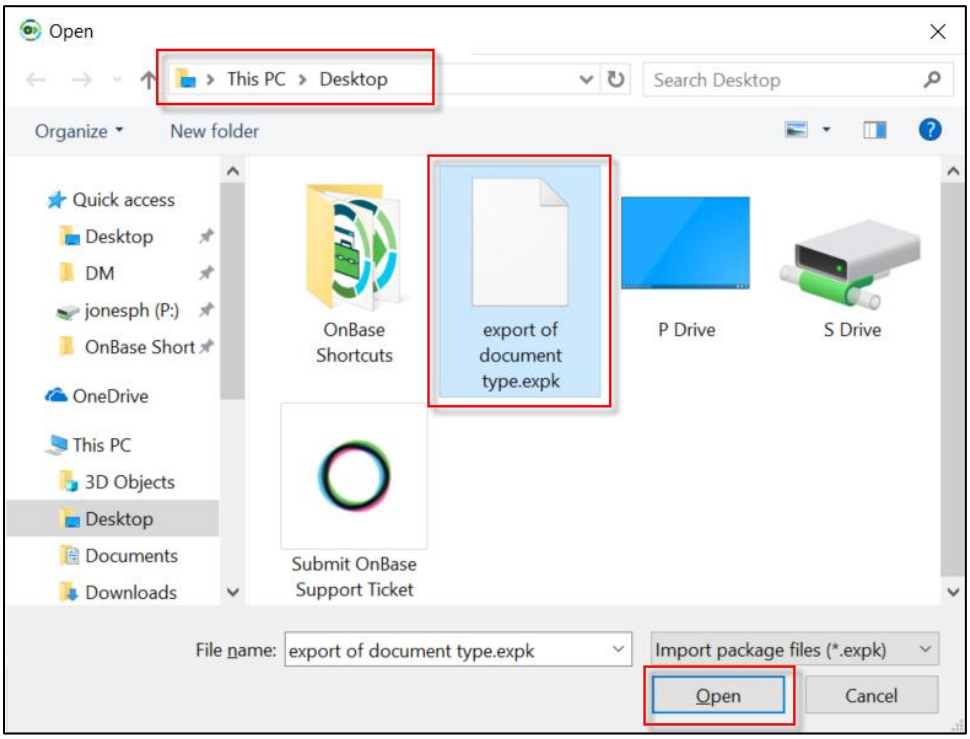
3. Proceed with common steps outlined here.

Common Import Steps for Studio, Configuration and UMC

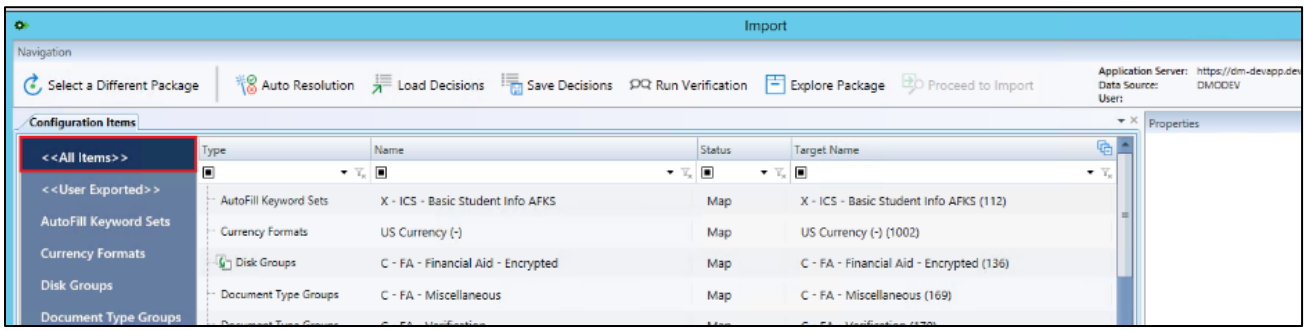
1. Click the **Browse** button in the upper right hand side of the window that appears.



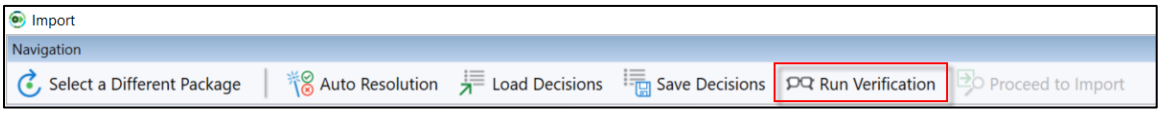
2. Navigate to the location where you saved your export package. Select the package and click **Open**. If you get a message that the file does not exist, this may be due to a file path that is too long. Try moving the file to a location with a shorter path, such as your Desktop.



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

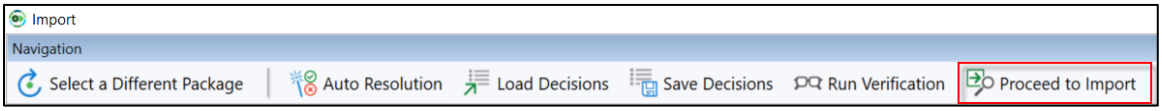


4. Click **Run Verification** at the top of your screen. This will evaluate the resolution decisions made to ensure the import will be successful.



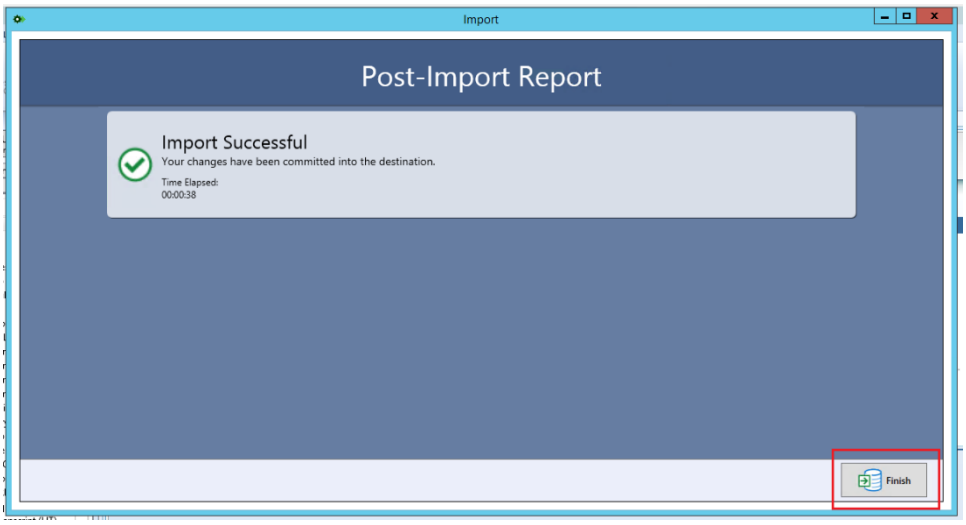
The verification process may generate errors and/or warnings. Please review these and resolve them as necessary. If there are any errors present, you will not be able to complete the import process. You CAN complete the import process with warnings present, but you should resolve them if able or verify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

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



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.

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

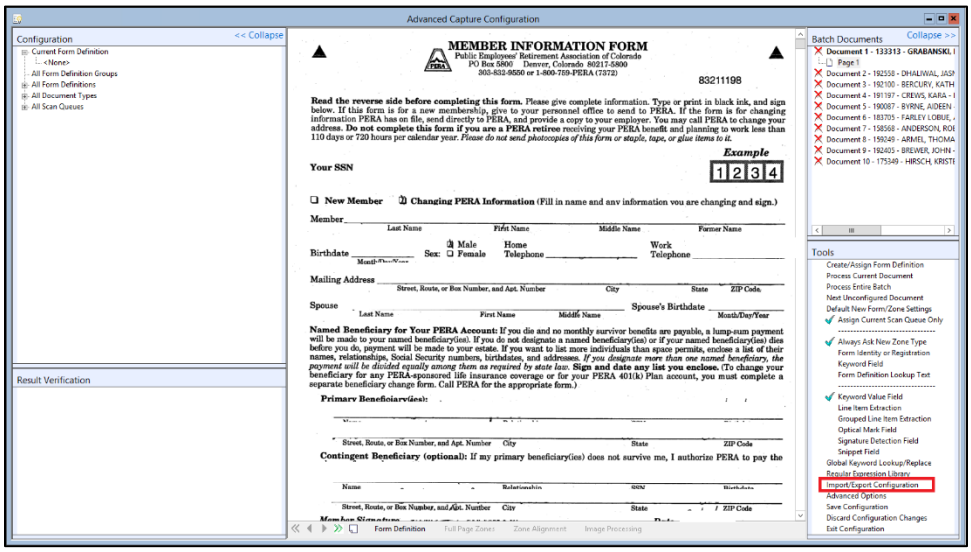
Importing in the Thick Client (Advanced Capture Templates)

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.

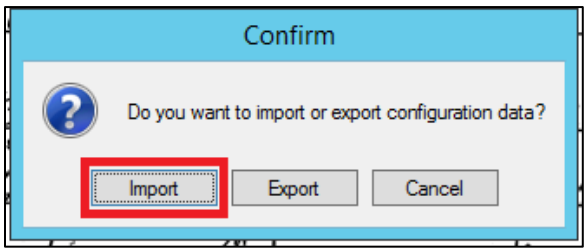
1. Open the thick client in the environment you want to export from (the source environment).

2. Navigate to **Advanced Capture Configuration** in the **Admin** menu.

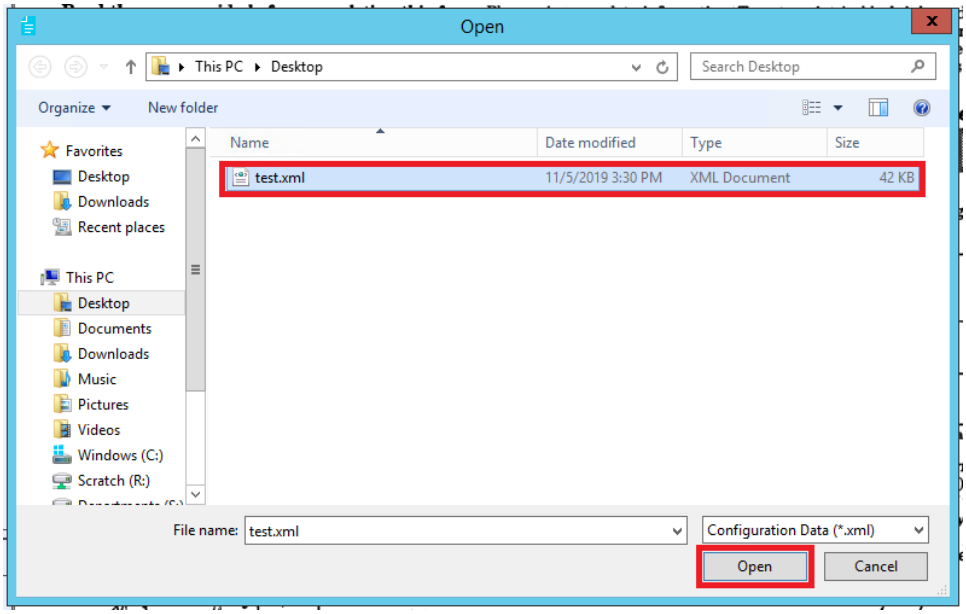
3. Open an advanced capture template. In the lower right corner, select **Import/Export Configuration** in the Tools section.



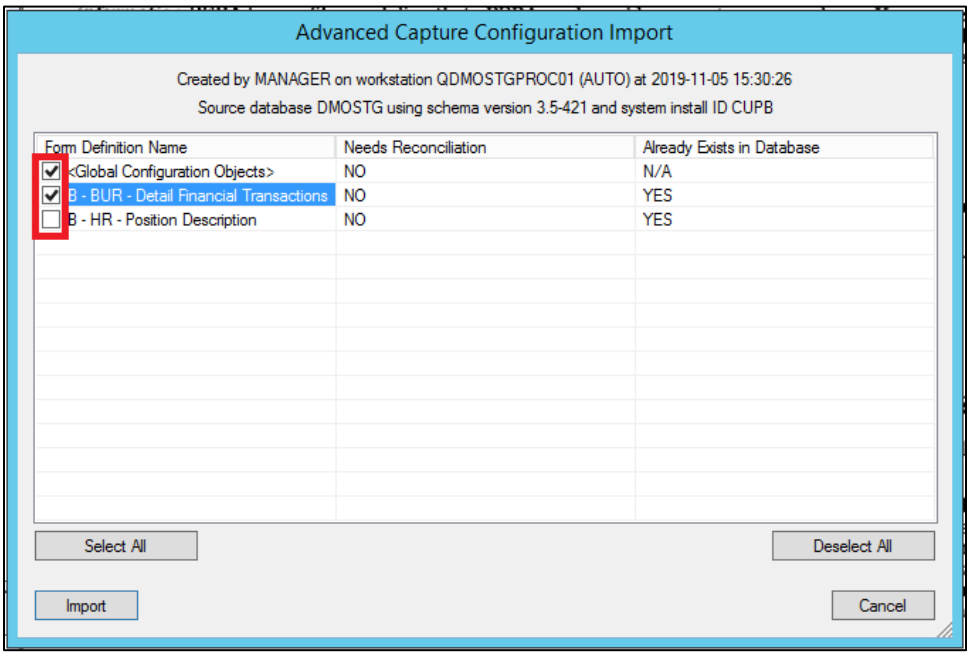
4. Chose **Import**.



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



6. Choose the templates to import using the checkboxes.



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 Workflow Notifications in the Handbook.
    - 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 a property (ex. referencing 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.