



University of Colorado

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OnBase Guide - OnBase Studio - Installation and Setup

Goal: To install OnBase Studio and connect to OnBase environments

Complexity Level: Departmental
Workflow/WorkView/Unity Script/Capture Process
Design Developers

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Prerequisites

You must have full local administrator access to the machine to perform this installation. If you do not have this access, please ask your local IT staff for support.

Background

OnBase Studio is the workflow and script development tool for the OnBase system. Workflow life cycles and notification templates are configured here, in addition to other items such as Item Generators and Portfolio Relations. For more information about Studio usage, refer to the Studio MRG.

Requirements to use OnBase Studio

In order to use OnBase Studio for workflow development, you must have the *Functional - Developer - Workflow* group assigned to your account. Generally, in order to be a member of this group you will need to successfully complete the [OnBase Introduction to Workflow Training](#).

There is an equivalent user group necessary for WorkView development, *Functional - Developer - WorkView*. More details are in the [WorkView Configuration Guide](#).

The same is true for Unity script development. The appropriate training/certification must be completed and then the [script developer agreement](#) must be submitted for membership in the *Functional - Developer - Unity Scripts* user group.

Capture Process Design configuration is available to the *Functional - Admin - System (Certified Only)* user group.

At least 16GB of RAM is recommended for workstations running OnBase Studio, 32GB is preferable.

Download and Install OnBase Studio

1. Download OnBase Studio from this location. This will always be the latest version of the product. A new version will need to be installed after each major version upgrade.

<https://dm-dev.dev.cu.edu/Clients/OnBaseStudio.zip>

2. Unzip the download and Install into the default location using setup.exe.



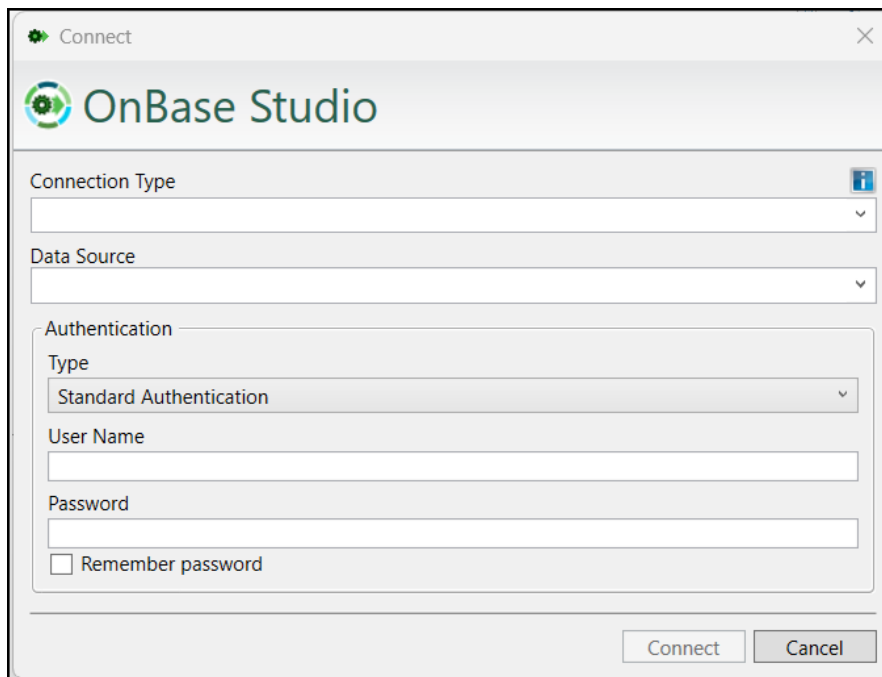
- You do not need Web Application Management Console, so if prompted you can skip that part of the installation and/or any option to launch Web Application Management Console.

NOTE: To configure scheduled processing (including Workflow timer work), you will need [Unity Management Console](#).

Setup Connections to the OnBase App Servers

The one install of OnBase Studio allows you to connect to any of the OnBase environments, you simply need to setup the connection strings for each.

- Launch OnBase Studio from the desktop shortcut.
- On the Connect dialog, you will see two fields that need to be populated for each environment: **Connection Type** and **Data Source**.



- In the **Connection Type** field, paste the URL below for the environment you wish to connect to.

Environment	Enter as Connection Type
DEV	https://dm-devapp.dev.cu.edu/AppServer/service.asmx
TST	https://dm-tstapp.qa.cu.edu/AppServer/service.asmx
STG	https://dm-stgapp.qa.cu.edu/AppServer/service.asmx
PRD	https://dm-app.prod.cu.edu/AppServer/service.asmx

- In the **Data Source** field, use the corresponding Data Source for each environment.

Environment	Enter as Data Source
DEV	DMODEV
TST	DMOTST
STG	DMOSTG
PRD	DMOPRD

5. Your Connect dialog should now look like the following.

6. Authenticate to OnBase using your OnBase credentials:
 - a. Select “Standard Authentication” as the **Type** if it’s not already selected.
 - b. Then enter your Operator ID in the **User Name** field and your OnBase **Password**.
 - c. If desired, check the **Remember Password** box to have OnBase Studio remember your login information.

7. Each time you add or use a new Connection Type, it will be saved by OnBase Studio and can then be selected via the **Connection Type** dropdown menu.

Connect

OnBase Studio

Connection Type

<https://dm-tstapp.qa.cu.edu/AppServer/service.asmx>

Local

<https://dm-app.prod.cu.edu/AppServer/service.asmx>

<https://dm-devapp.dev.cu.edu/AppServer/service.asmx>

<https://dm-stgapp.qa.cu.edu/AppServer/service.asmx>

<https://dm-tstapp.qa.cu.edu/AppServer/service.asmx>

User Name

Password

Remember password

Connect Cancel

