



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus



OnBase Guide - Thick Clients - Installation and Setup

Goal: To install the OnBase Thick Client and Configuration Client that are used for system configuration and certain administrative features

Complexity Level: Departmental Administrative Users

1/5/2024

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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

The OnBase thick clients, OnBase Configuration and OnBase (Thick) Client, are also known as the legacy clients. They are referred to as “thick” clients because they rely on connection to the database, rather than connecting through an app server like the Unity client, web client and Studio.

The OnBase thick clients rely on an ODBC connection in Windows to talk to the OnBase database. At the University of Colorado, we use an Oracle database for the OnBase system which means that you **must** install the Oracle ODBC drivers for the OnBase thick clients to talk with the OnBase database.

The first part of this document will cover the [Oracle ODBC driver install](#) and the second part will cover the [OnBase client installs](#).

Usage

The thick clients are used by **administrators and power users** to conduct large document processing actions (like DIP/DrIP/COLD imports or creating OCR templates) and administrative actions in the OnBase system (like managing users and user groups, creating document types, creating scan queues, etc.).

Most users do not need to have these clients installed and can do everything in the Unity and/or web client.

Below are some of the uses for each client.

OnBase Client (referred to in places as the Thick Client)

- Target Audience:
 - Operations/Processing users who need more power or control than what the Unity client can offer (we encourage Unity client usage over the thick client)
 - Certified OnBase Administrators
- Typical Functions:
 - Bulk Scanning and Indexing
 - Creating OCR templates
 - Automated batch imports/sweeps (running as a windows service)
 - Moving documents through status queues (running as a windows service)
 - Document Maintenance
 - Managing document and process locks



OnBase Configuration

- Target Audience:
 - Certified OnBase Administrators only
 - Typical Functions:
 - Manage Users
 - Creating Groups (User access to Document Types, Workflow, etc)
 - Creating Document Types
 - Creating Keyword Types
 - Creating Scan Queues
 - Binding configuration elements together
-

Access Requirements to use the OnBase Thick Clients

To use OnBase Configuration, you must have the *Functional - Admin - System* group assigned to your account. In order to be a member of this group you will need to successfully complete the [OnBase System Administration Training](#).

For other Thick client usage, access requirements will vary. Refer to the [Functional Security Group Definitions](#) for more information.

Download and extract the software package

To install the products in this guide you must first download the OnBase packages we've put together. The download requires that you are connected to a campus network or VPN.

The latest versions are always available from the below locations:

- https://dm-dev.dev.cu.edu/Clients/OnBase_Thick_Clients.zip
- https://dm-dev.dev.cu.edu/Clients/Oracle_12c_Client_x86.zip

Save the zip files to a local drive like C:\temp. Once they are downloaded, extract all the files.

Oracle Client and ODBC Driver

NOTE: These steps to setup the ODBC Driver only need to be completed once.

The Oracle client and ODBC connections **do not need to be redone** if you are **installing a new version** of the Configuration or Thick client after an upgrade. Once the ODBC connections are set up, you can keep using the same connections for new versions of OnBase.

If you already have the Oracle client and ODBC driver installed but do not have the OnBase clients installed, you may **skip these steps** and [go onto the step where you copy the ora config files](#) to the Oracle folders.

Installing the Oracle Client

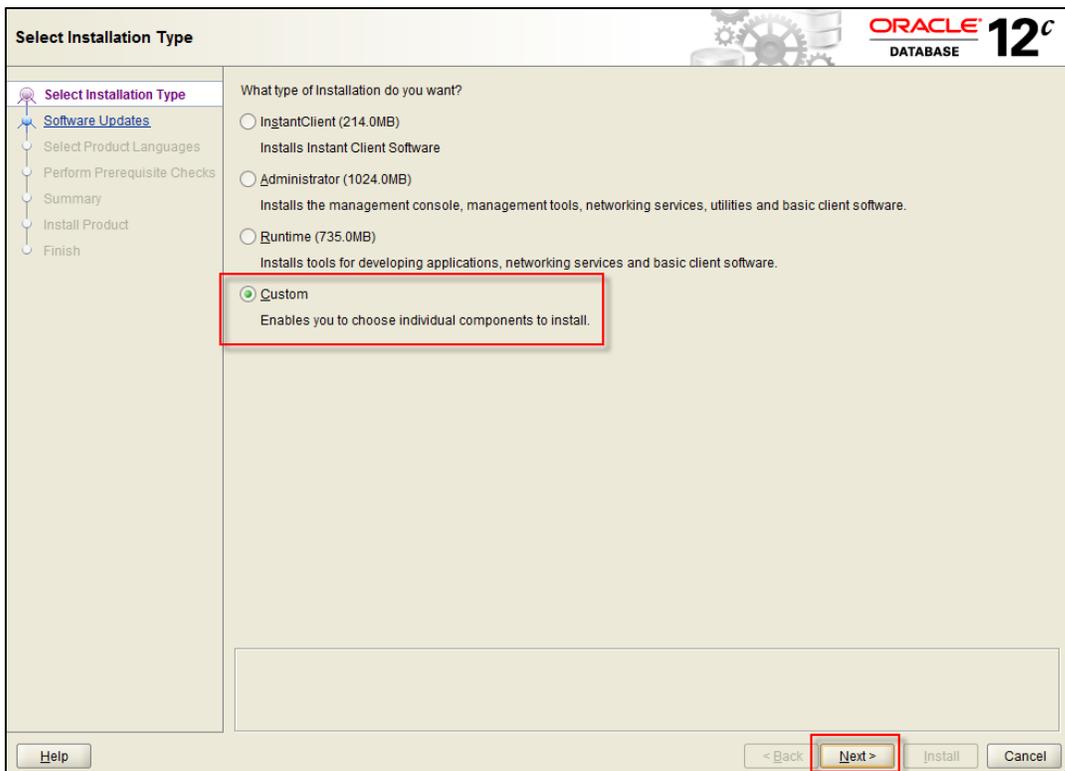
1. Extract the **Oracle_12c_Client_x86.zip** file then double click to get access to the folders inside.
2. To install the Oracle ODBC driver, go into the **Oracle 12c Client x86** folder.

Name	Date modified	Type	Size
 Oracle 12c Client x86	9/6/2016 5:18 PM	File folder	
 tnsnames	9/8/2016 10:27 AM	File folder	
 32Bit ODBC Manager	7/9/2014 2:57 PM	Shortcut	2 KB

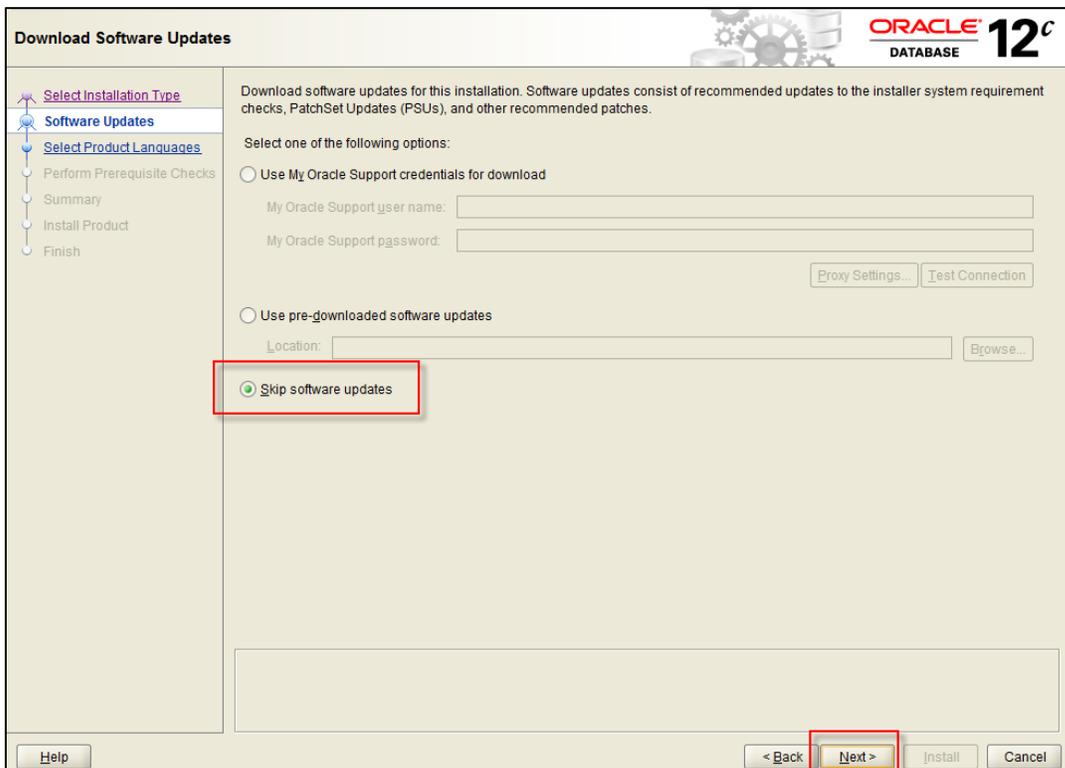
3. In that folder double click on the **Setup.exe** to start the Oracle client install.

Name	Date modified	Type	Size
 install	8/11/2016 1:54 PM	File folder	
 response	8/11/2016 1:54 PM	File folder	
 stage	8/11/2016 1:54 PM	File folder	
 setup.exe	4/19/2012 2:36 AM	Application	62 KB
 setup.ini	8/21/2007 8:39 PM	Configuration settings	1 KB
 welcome.html	7/2/2013 2:19 AM	HTML Document	1 KB

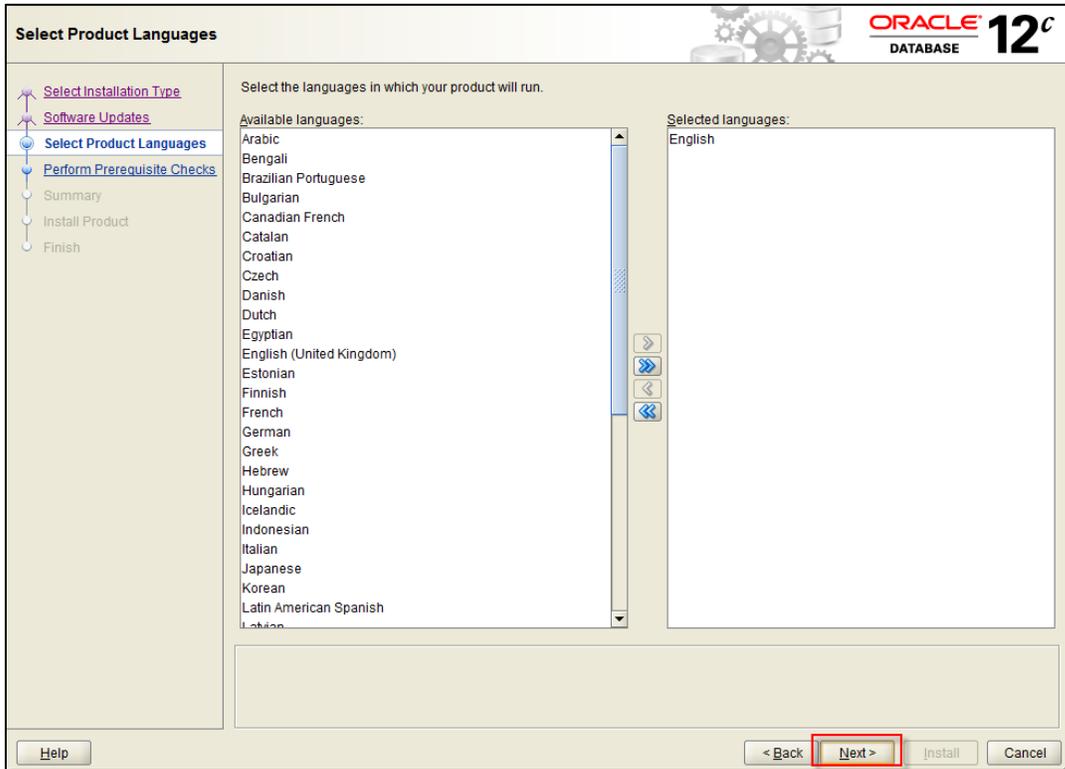
4. When the Oracle client installer has started up, select the **Custom** installation option and click **Next**.



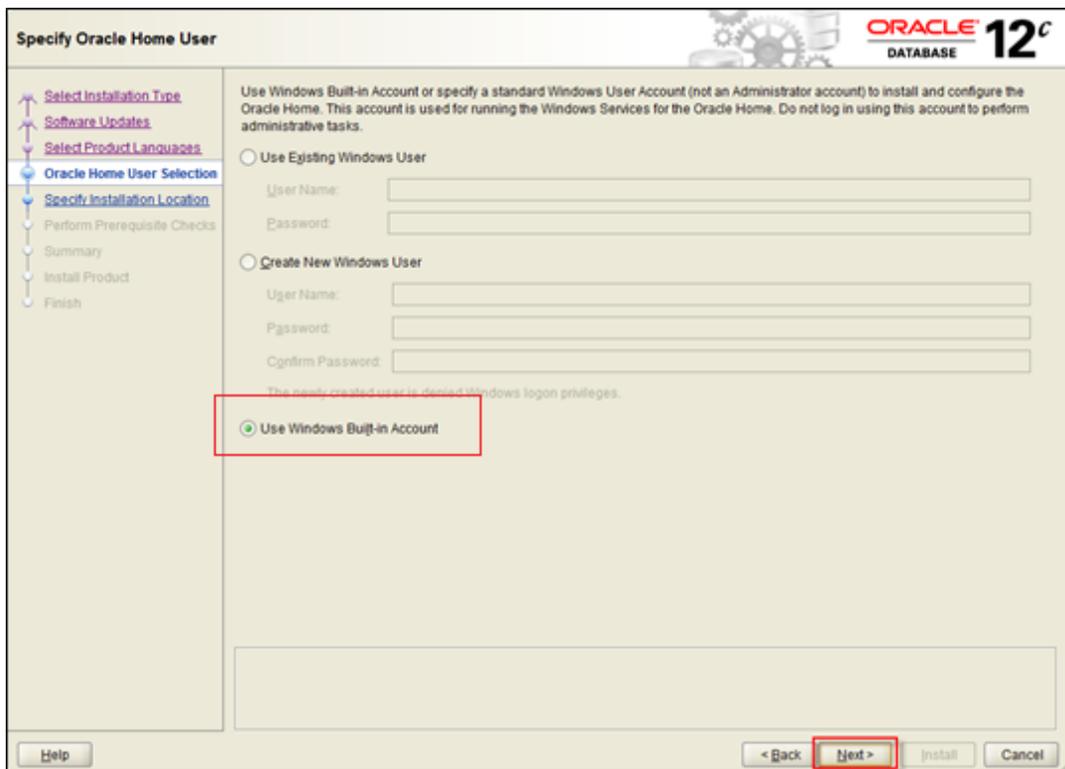
5. If prompted, leave the default selection for software updates and click on **Next**.



6. On the next page English will already be selected, click on the **Next** button.



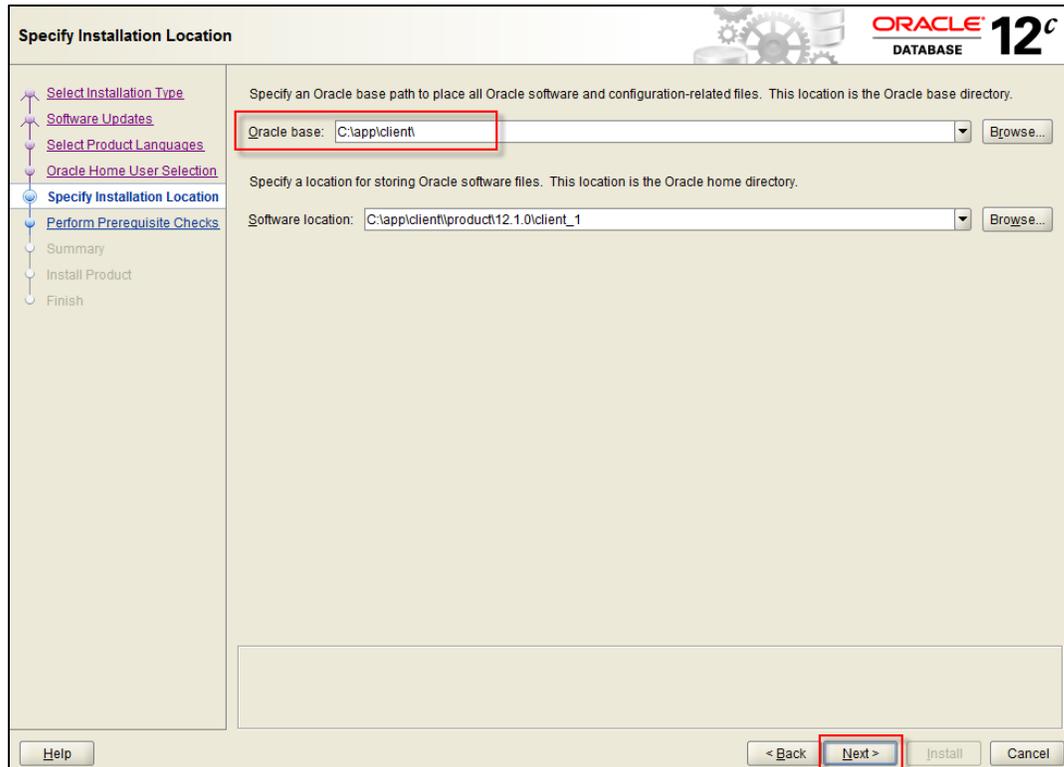
7. The next page is asking for a user to use for the Oracle Home, leave the default **Use Windows Built-In Account** and click **Next**.



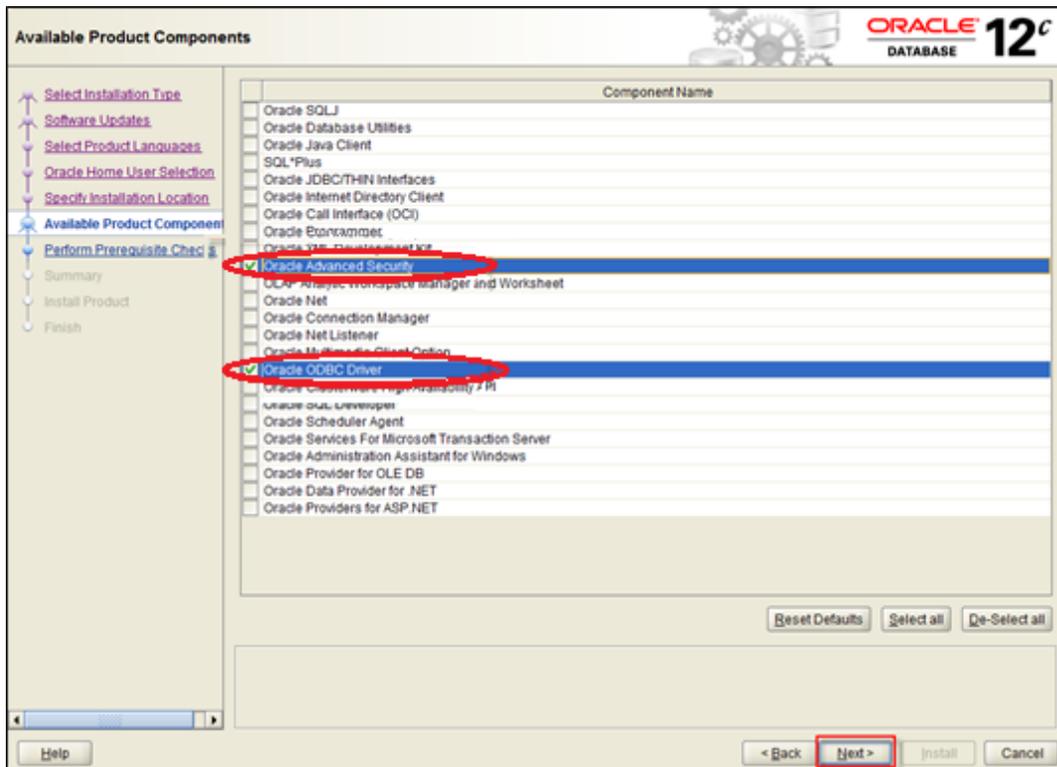
- The next page the installer is asking for the installation location, **MODIFY** the default **Oracle Base** path to

C:\app\client

The **Software Location** field below the base field will update to match that base path. Click on **Next**.



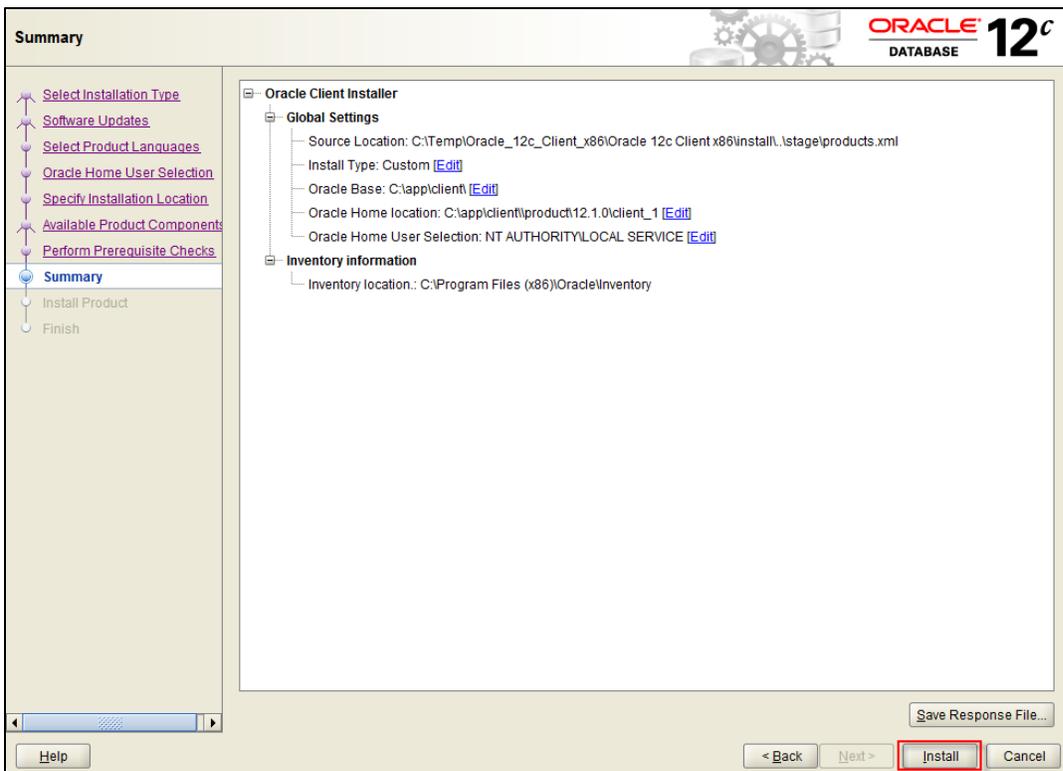
- Select the **Oracle Advanced Security** and **Oracle ODBC Driver** in the products list. Any other required components will be installed along with these. Click on **Next**.



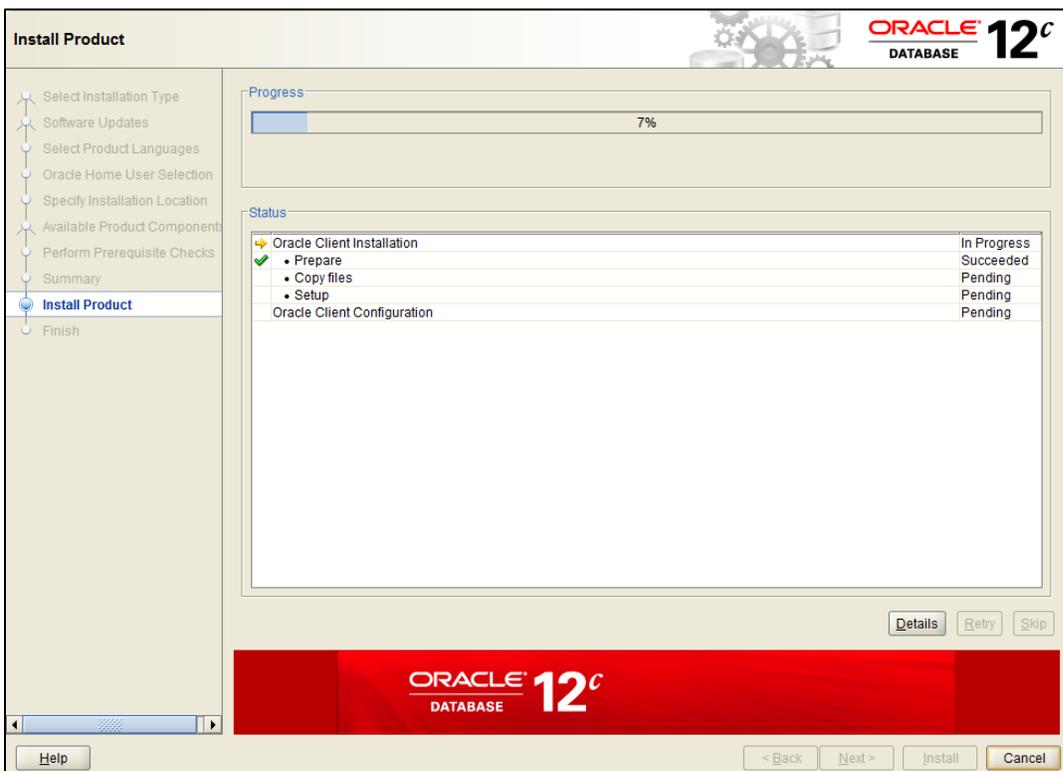
10. This screen shows a summary of what will be installed. Make sure the Oracle Base path is

C:\app\client

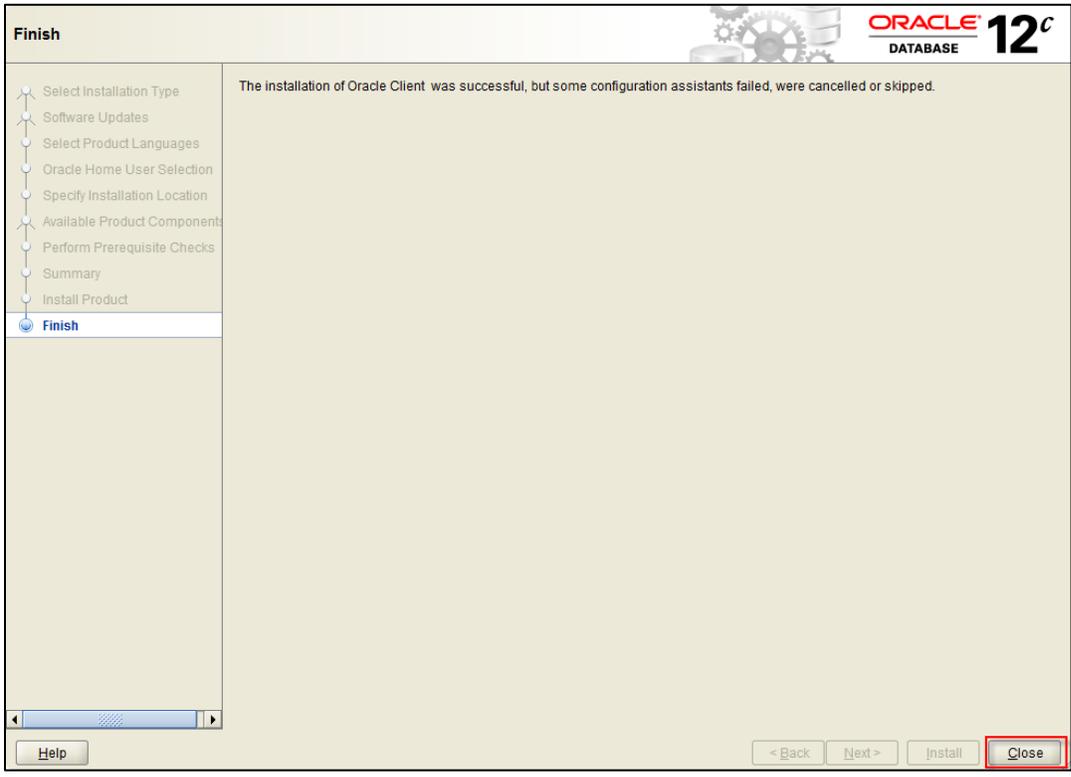
If everything looks correct, click on **Install** or go back to make changes.



11. The installer will begin installing the Oracle Client.



12. Finally, you'll be at the last screen for the installation, Click on **Close**.



Copying the .ora Files

Once you've completed an install of the Oracle client, you'll need to copy a couple of files from the extracted zip file into your Oracle client folder. These files contain the information that the ODBC client needs to connect to the database server.

1. Extract the **Oracle_12c_Client_x86.zip** file then open to get access to the folders inside.
2. Open the **tnsnames** folder.

Name	Date modified	Type	Size
Oracle 12c Client x86	9/6/2016 5:18 PM	File folder	
tnsnames	9/8/2016 10:27 AM	File folder	
32Bit ODBC Manager	7/9/2014 2:57 PM	Shortcut	2 KB

3. Copy the **two** files there (**sqlnet.ora** AND **tnsnames.ora**) to
 C:\app\client\product\12.2.0\client_1\network\admin
 (or whatever location is equivalent) in your Oracle client install.

Name	Date modified	Type	Size
sqlnet.ora	2/11/2011 4:22 PM	ORA File	2 KB
tnsnames.ora	8/7/2012 3:00 PM	ORA File	1 KB

Name	Date modified	Type	Size
sample	3/4/2019 15:43	File folder	
sqlnet.ora	2/11/2011 16:22	ORA File	2 KB
tnsnames.ora	6/16/2017 10:12	ORA File	36 KB

- If you already have a **sqlnet.ora** file in that location, please overwrite it with the file from the zip file.
- If you already have a **tnsnames.ora** file in that location, you may need to contact someone in your organization to see if the files need to be merged. They may have already setup the Oracle client for another purpose.

NOTE: The tnsnames.ora file included in this download is for users working at the Boulder, Colorado Springs, Denver and Anschutz campuses. If you are a System Administration user (with a cu.edu email address), please contact UIS_DM_Support@cu.edu for an alternate tnsnames file.

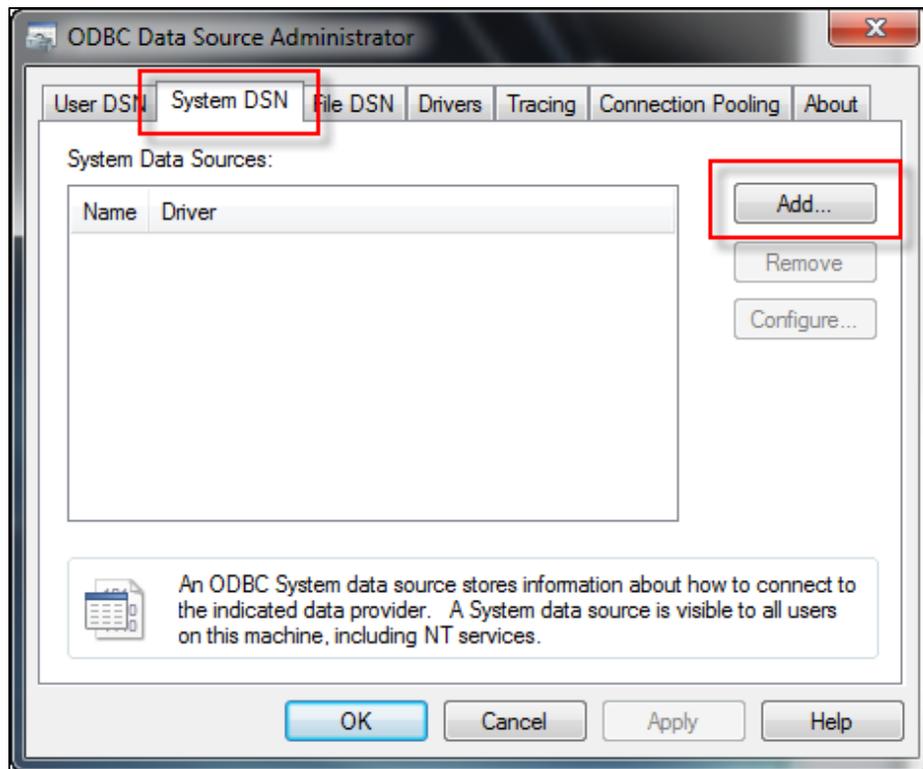
Creating the OnBase ODBC connection in Windows

We can now create the ODBC connection that the OnBase client will use to talk to the database.

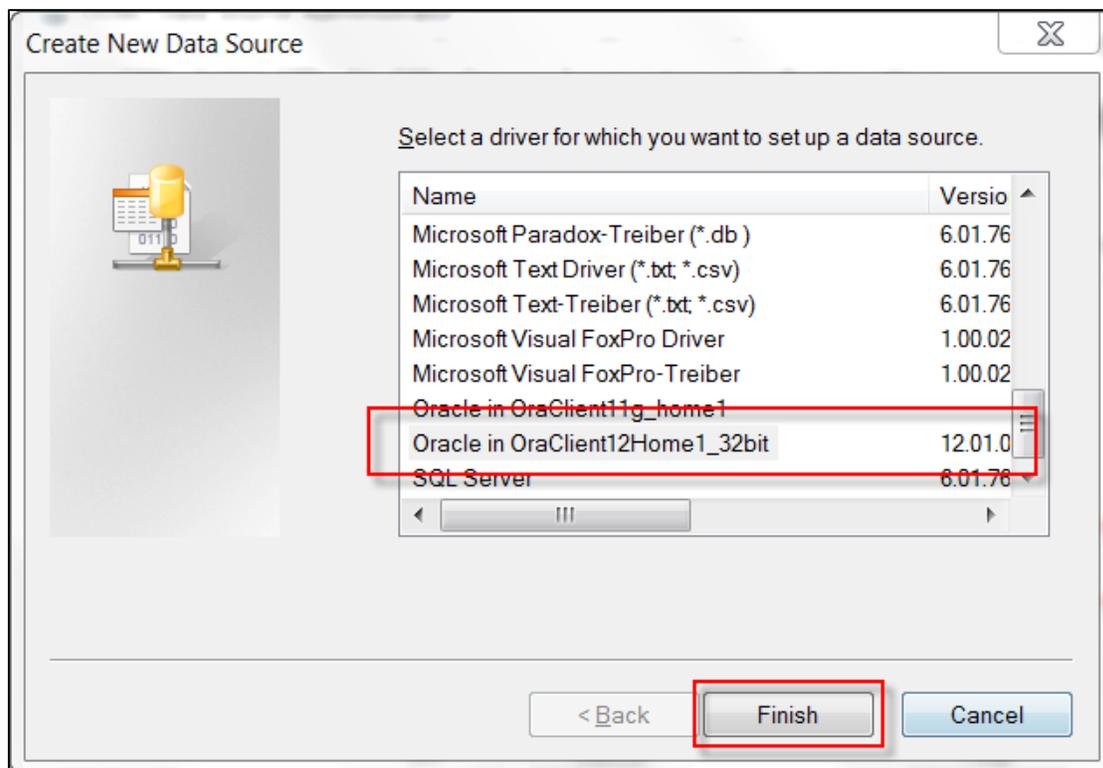
- In the root of the extracted zip file, you will see a shortcut called **32Bit ODBC Manager**. Double click that shortcut.

Name	Date modified	Type	Size
Oracle 12c Client x86	9/6/2016 5:18 PM	File folder	
tnsnames	9/8/2016 10:27 AM	File folder	
32Bit ODBC Manager	7/9/2014 2:57 PM	Shortcut	2 KB

- This will bring up the Windows ODBC Data Source Administrator. Select the **System DNS** tab and click on the **Add button**.



3. Scroll to the very bottom on the list and select the **Oracle in OraClient12Home1_32bit** driver, then click on **Finish**.



- You now need to type in a **Data Source Name**, please use “DMODEV” as the name and enter “DMODEV” **TNS Service Name**. Then click on **OK**.

Oracle ODBC Driver Configuration

Data Source Name: DMODEV

Description:

TNS Service Name: DMODEV

User ID:

Application: Oracle | Workarounds | SQLServer Migration

Enable Result Sets: Enable Query Timeout: Read-Only Connection:

Enable Closing Cursors: Enable Thread Safety:

Batch Autocommit Mode: Commit only if all statements succeed

Numeric Settings: Use Oracle NLS settings

Buttons: OK, Cancel, Help, Test Connection

- Click on **OK** in the ODBC Data Source Administrator to close the dialog.
- Repeat this process three more times to add System Data Sources for the other environments. From **System DNS**, choose **Add**, select the **Oracle client**, then enter the environment information.
 - Enter “DMOPRD” for **Data Source Name** and **TNS Service Name**, then click **OK** to close the dialog.

Oracle ODBC Driver Configuration

Data Source Name: DMOPRD

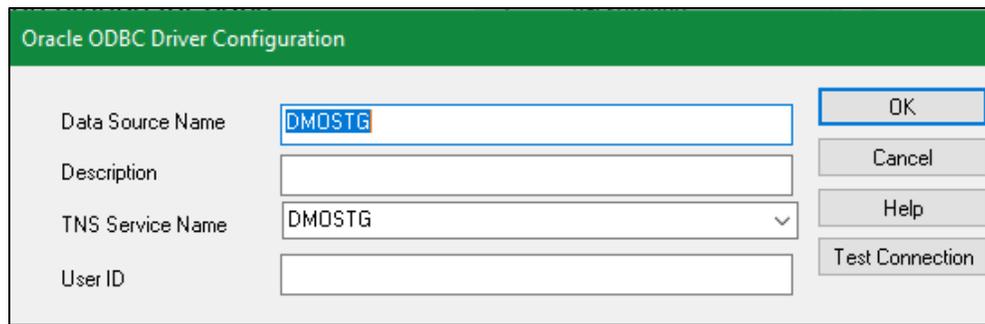
Description:

TNS Service Name: DMOPRD

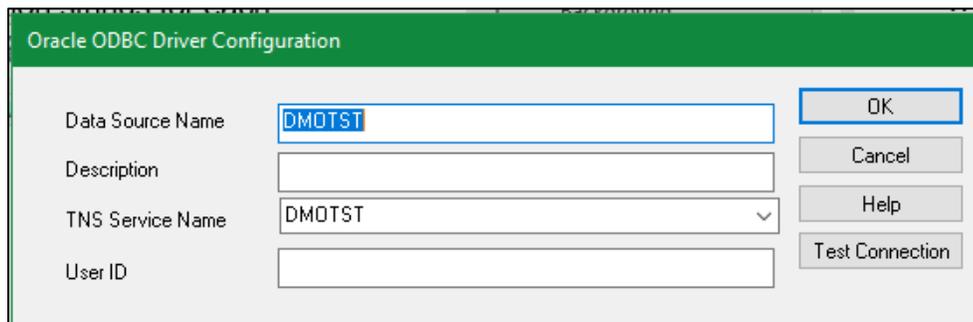
User ID:

Buttons: OK, Cancel, Help, Test Connection

- Enter “DMOSTG” for **Data Source Name** and **TNS Service Name**, then click **OK** to close the dialog.



- c. Enter “DMOTST” for **Data Source Name** and **TNS Service Name**, then click **OK** to close the dialog.



7. Click **OK** to close the ODBC Data Source Administrator window.

Installing the OnBase Clients

The OnBase Client download consists of three installations:

1. OnBase (Thick) Client
2. OnBase Configuration client
3. OCR components - Only needed for configuration of Advanced Capture OCR templates

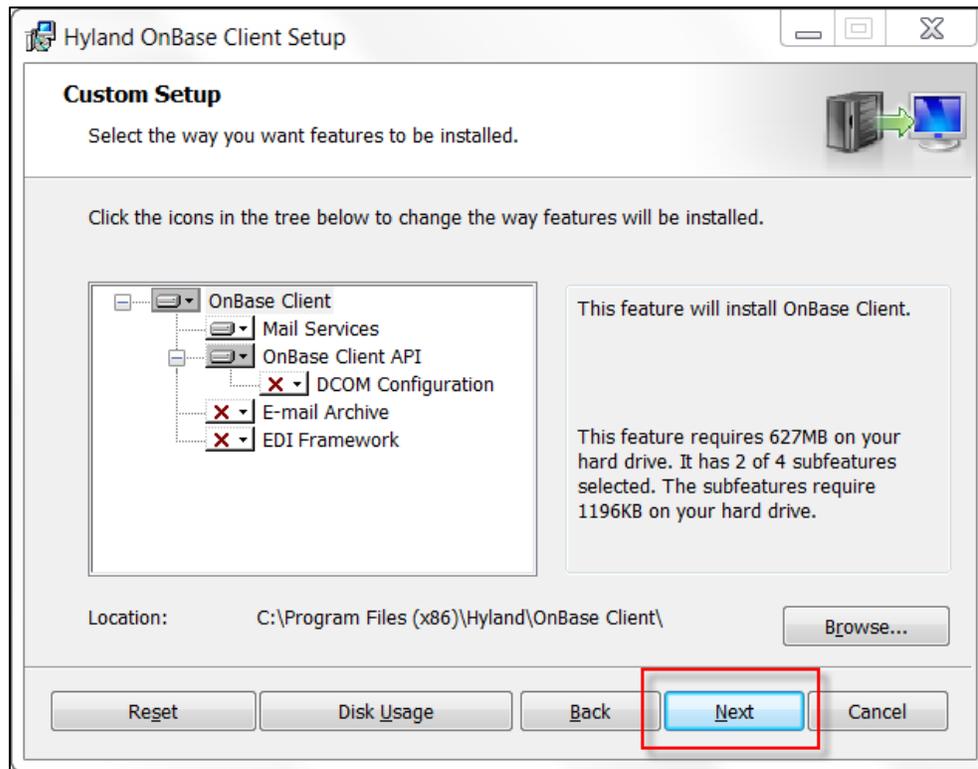
OnBase (Thick) Client

1. Double click on the **OnBase_Thick_Clients.zip** file (or extract the file) to get access to the folders inside.
2. To start the OnBase Client install go into the OnBase Client folder and run the **setup.exe**.

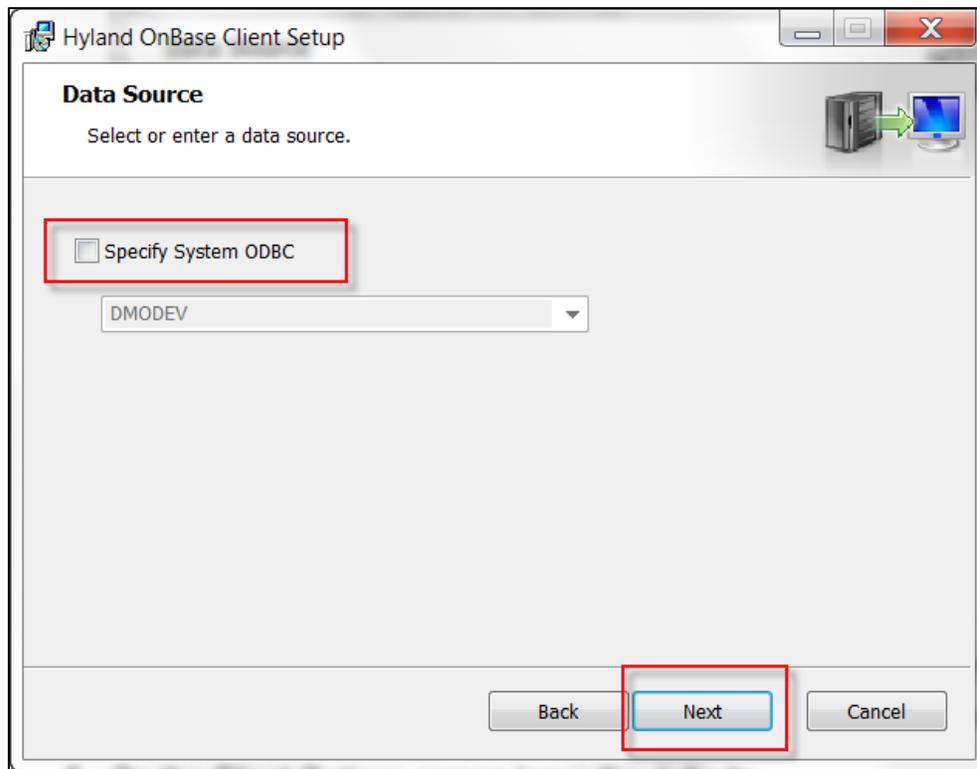
Name	Date modified	Type	Size
 OnBase Client	9/23/2016 5:06 PM	File folder	
 OnBase Client OCR Client 19.20	9/28/2016 12:12 PM	File folder	
 OnBase Configuration	9/23/2016 5:07 PM	File folder	

Name	Date modified	Type	Size
 setup.exe	9/15/2016 9:56 AM	Application	7,811 K
 media1.cab	9/15/2016 9:56 AM	CAB File	378,035 K
 Hyland OnBase Client.msi	9/15/2016 9:55 AM	Windows Installer Package	2,752 K

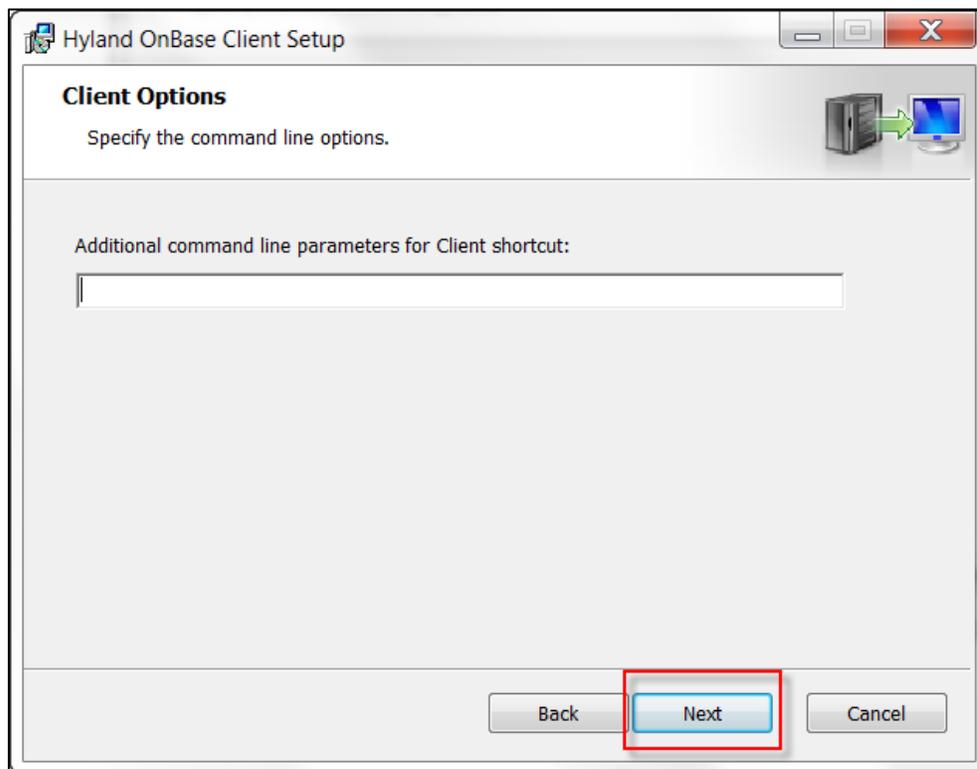
3. At the Custom Setup dialog leave all options as default. Click on **Next**.



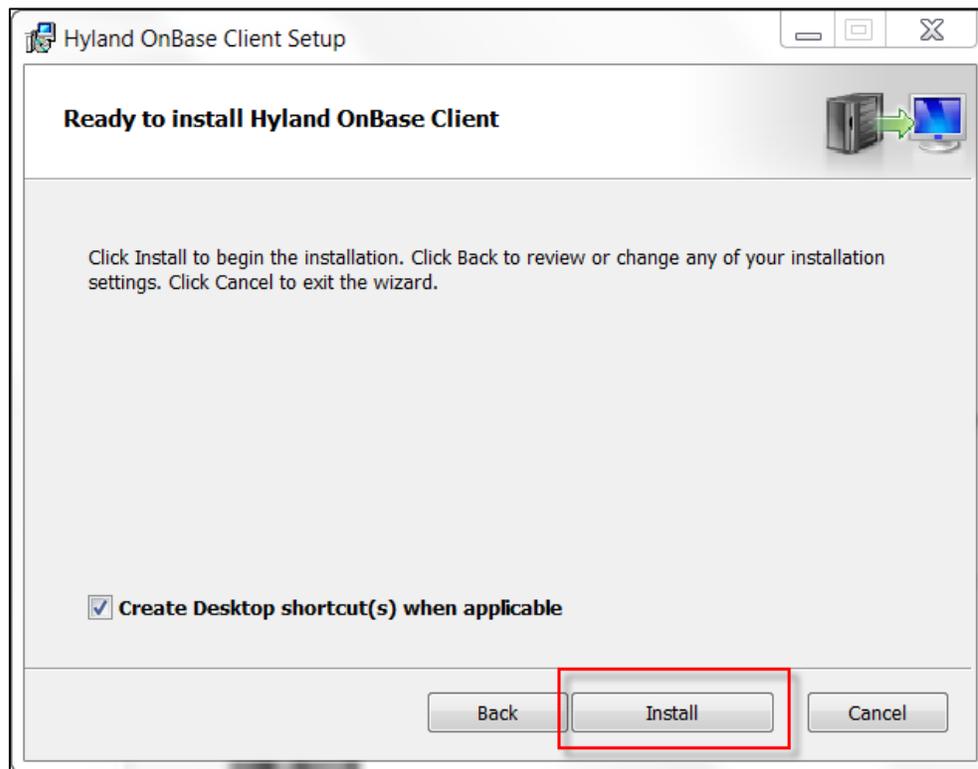
4. At the Data Source screen, uncheck the **Specify System ODBC** option.



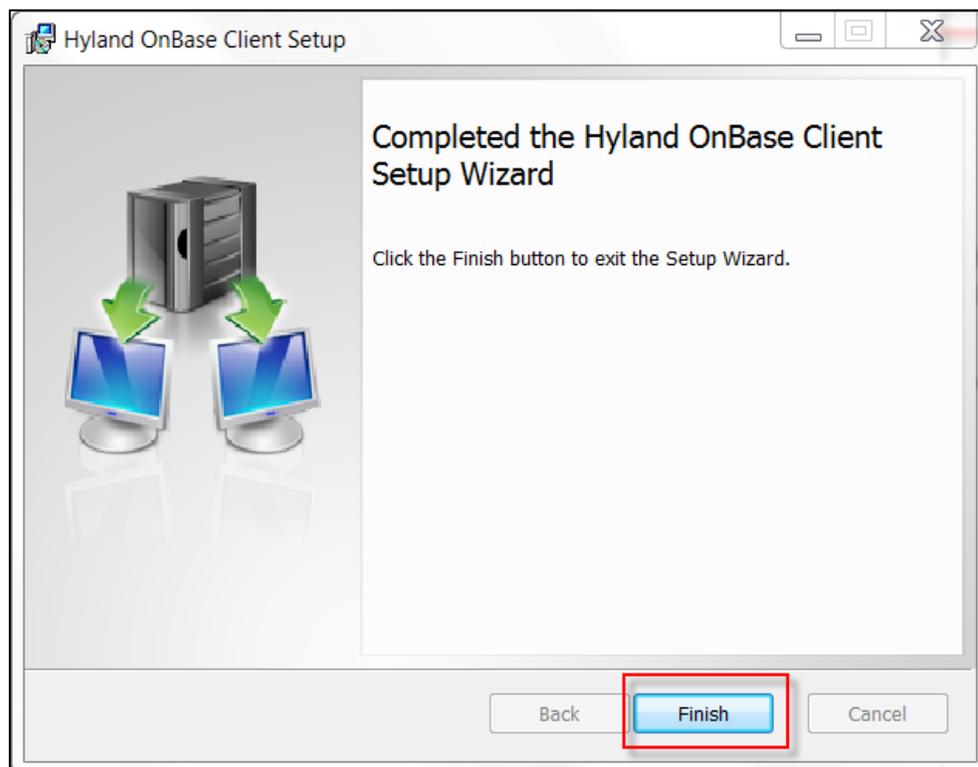
5. On the Client Options screen leave the defaults and click on **Next**.



6. On the final screen, make sure that the **Create Desktop shortcuts** box is checked and click on **Install**.



7. Click on **Finish** to close the installer.



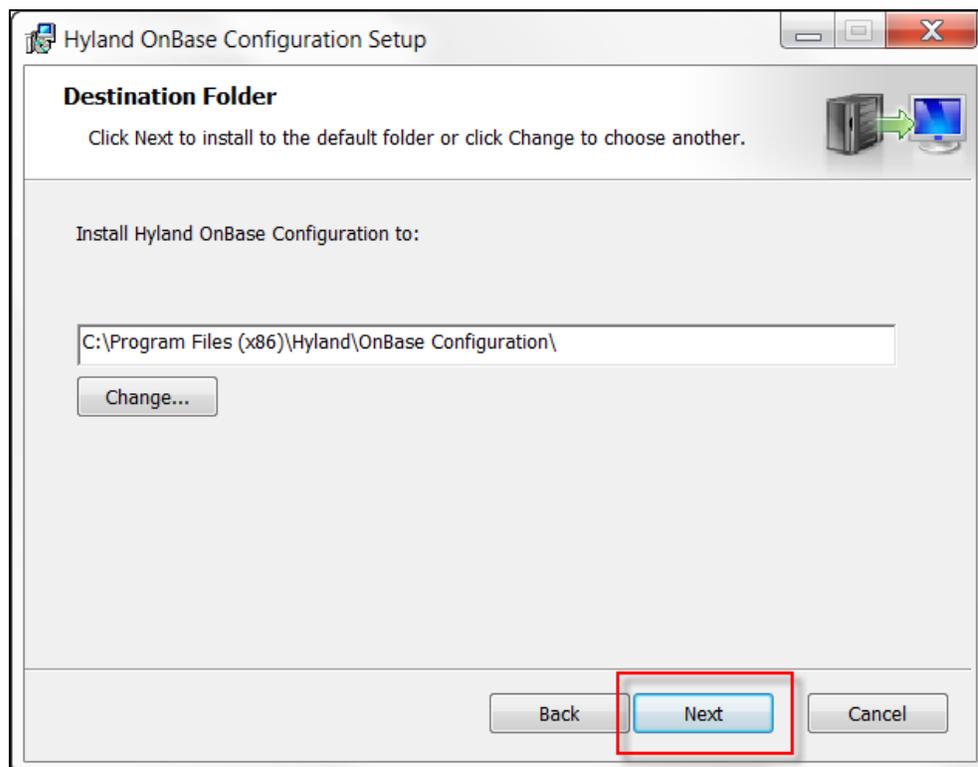
OnBase Configuration Client

1. Double click on the **OnBase_Thick_Clients.zip** file (or extract the file) to get access to the folders inside.
2. To start the OnBase Configuration Client install go into the OnBase Configuration folder and run the **setup.exe**.

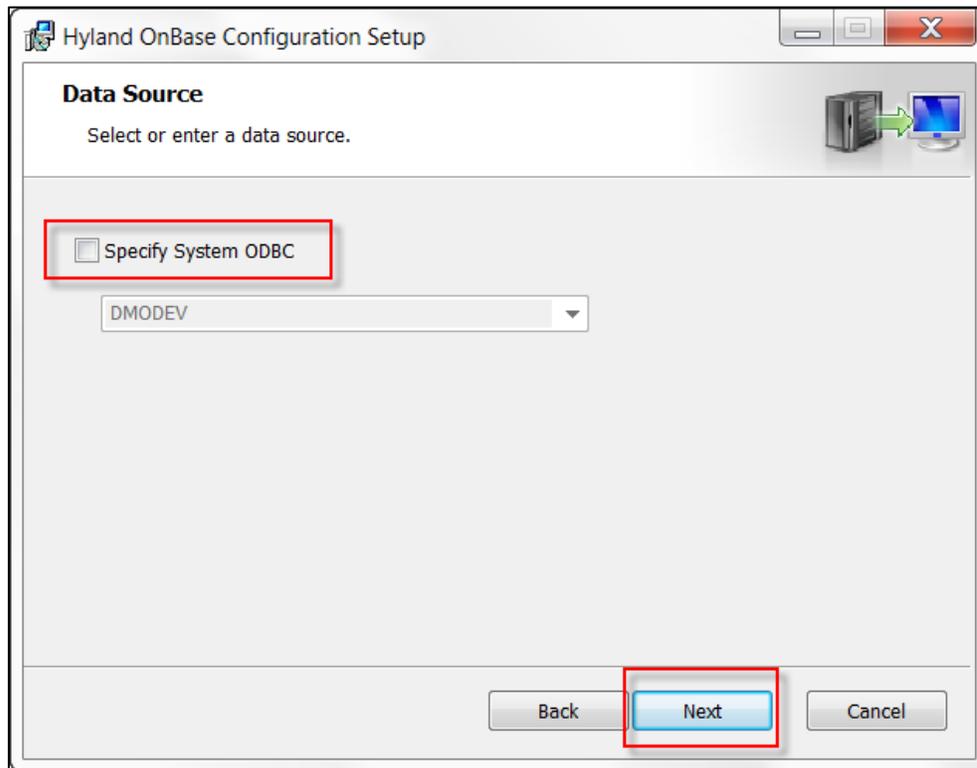
Name	Date modified	Type	Size
OnBase Client	9/23/2016 5:06 PM	File folder	
OnBase Client OCR Client 19.20	9/28/2016 12:12 PM	File folder	
OnBase Configuration	9/23/2016 5:07 PM	File folder	

Name	Date modified	Type	Size
setup.exe	9/15/2016 9:56 AM	Application	7,811
Hyland OnBase Configuration.msi	9/15/2016 9:56 AM	Windows Installer Package	342,952

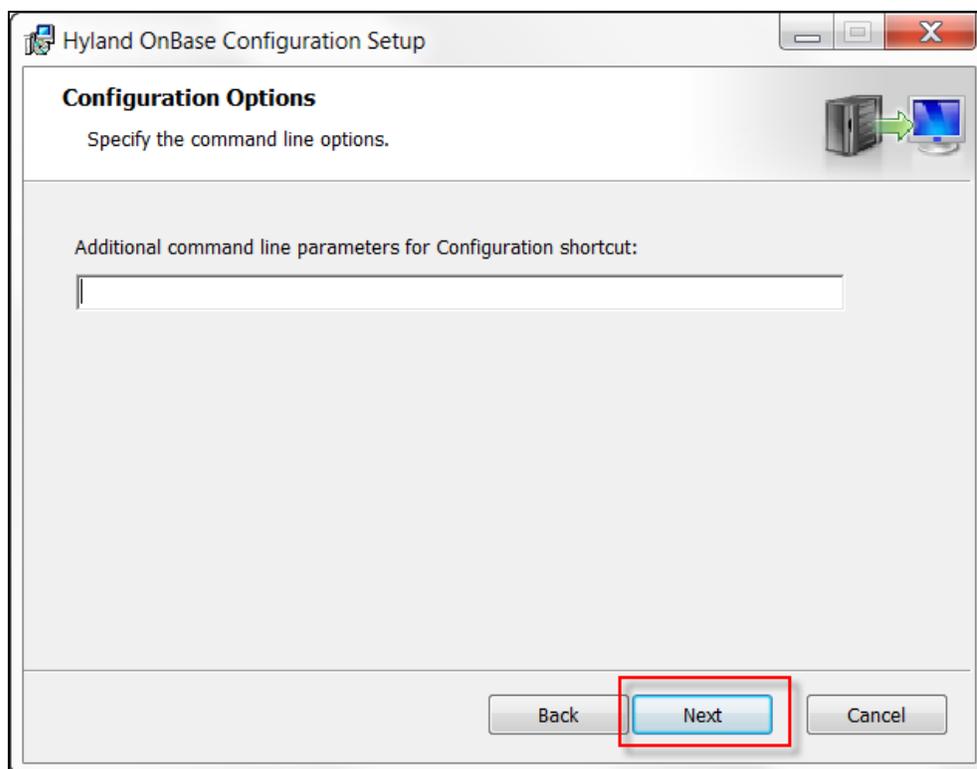
3. Leave the default path and click **Next**.



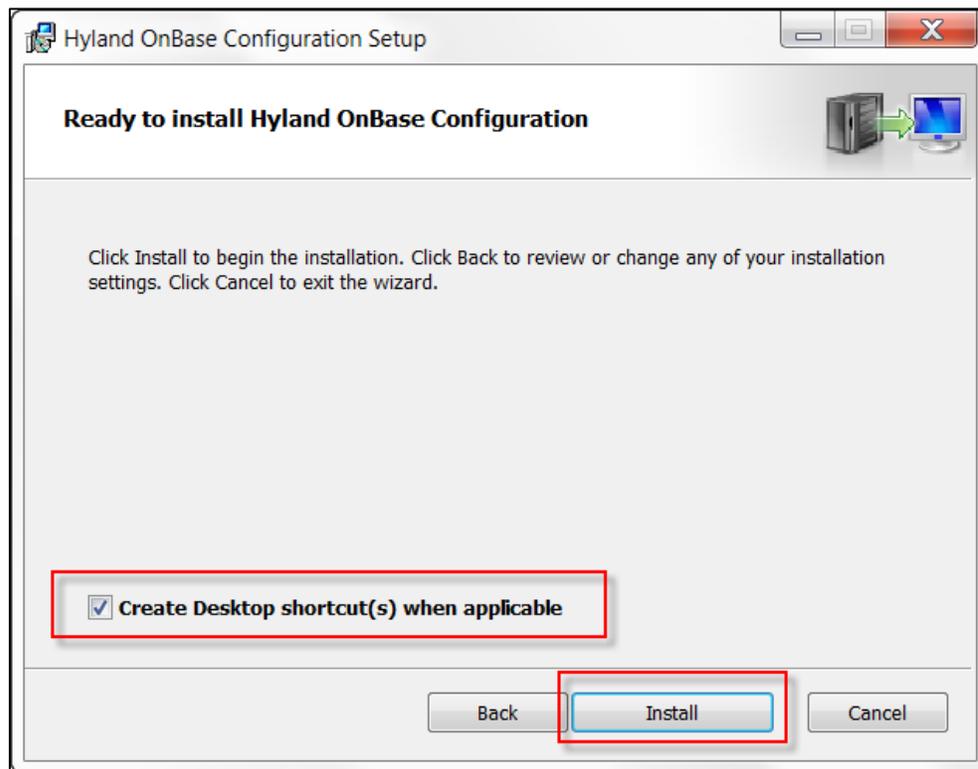
4. Uncheck the **Specify System ODBC** box and click on **Next**.



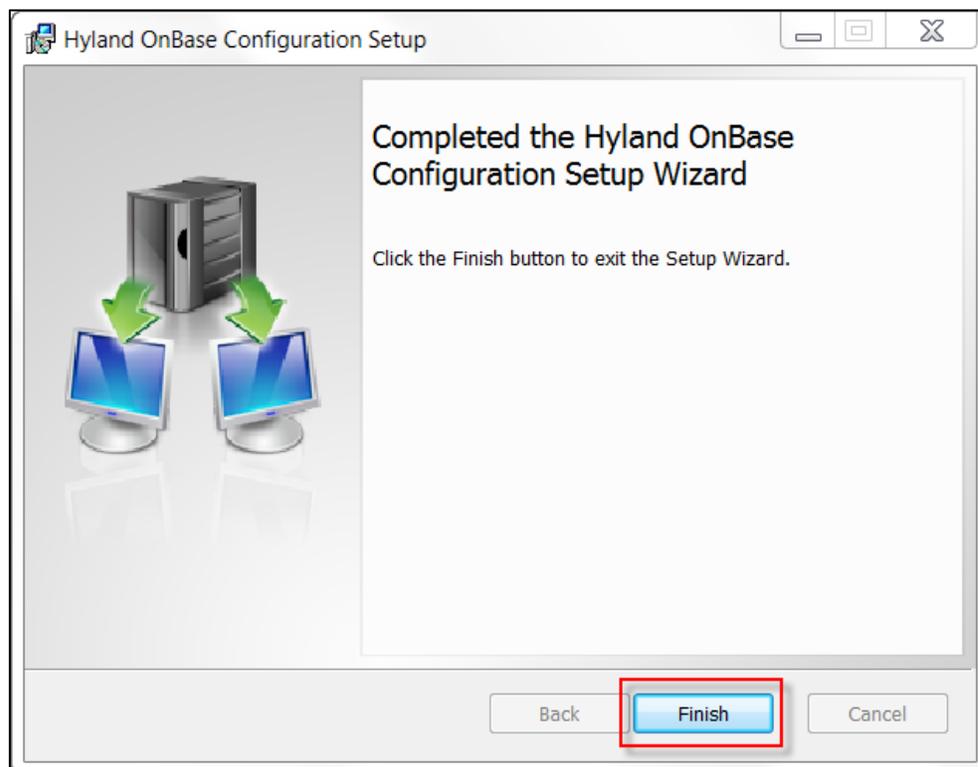
5. On the Configuration Options screen leave the defaults and click on **Next**.



6. On the final screen, make sure that the **Create Desktop shortcuts** box is checked and click on **Install**.



7. Click on **Finish** to close the installer.



OnBase OCR

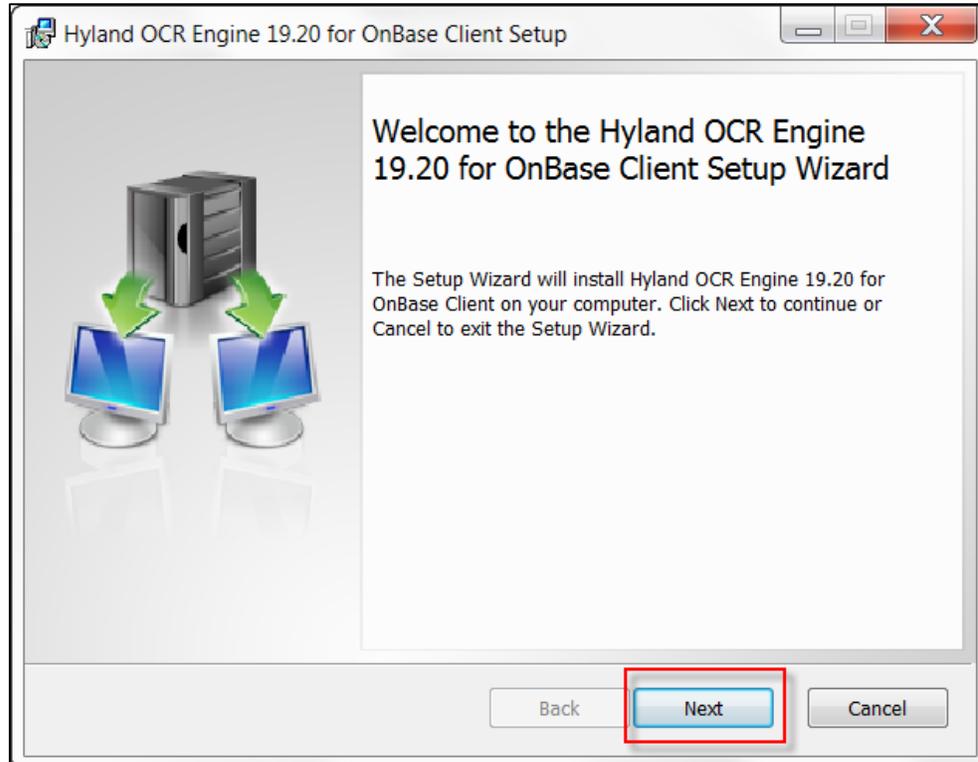
The OnBase OCR component can be installed next, if applicable. If you will not be configuring Advanced Capture OCR templates, you can skip this install.

1. Double click on the **OnBase_Thick_Clients.zip** file (or extract the file) to get access to the folders inside.
2. To start the OnBase Configuration Client install go into the OnBase Configuration folder and run the **setup.exe**.

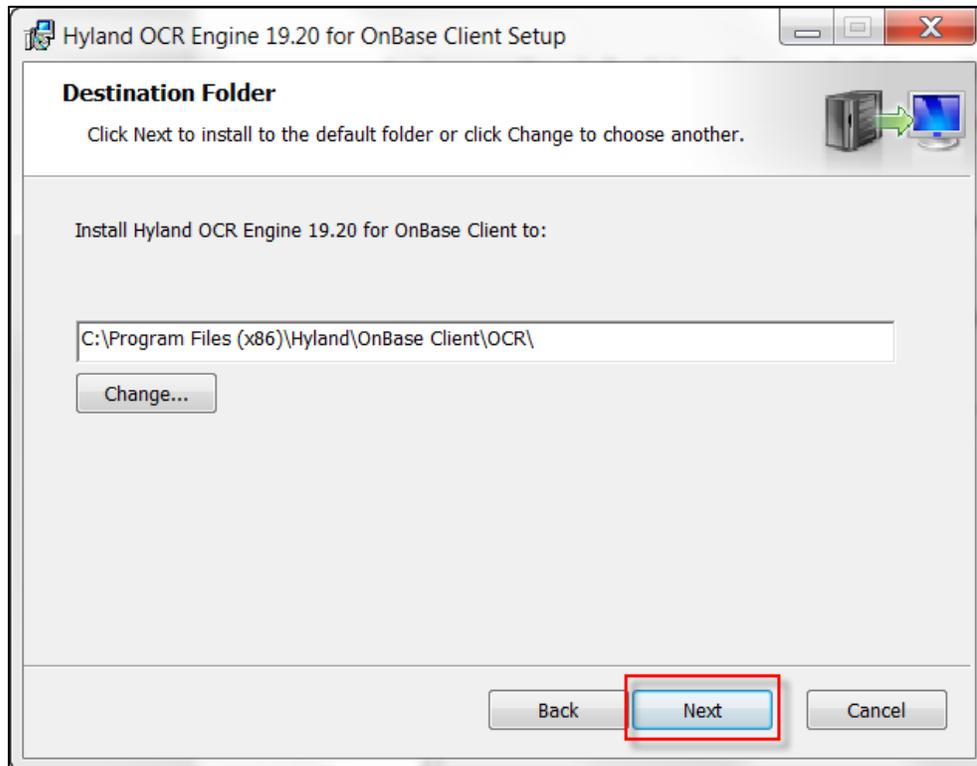
Name	Date modified	Type	Size
OnBase Client	9/23/2016 5:06 PM	File folder	
OnBase Client OCR Client 19.20	9/28/2016 12:12 PM	File folder	
OnBase Configuration	9/23/2016 5:07 PM	File folder	

Name	Date modified	Type	Size
setup.exe	8/7/2015 11:19 AM	Application	6,592
Hyland OCR Engine 19.20 for OnBase Client.msi	8/7/2015 11:18 AM	Windows Installer Package	303,328

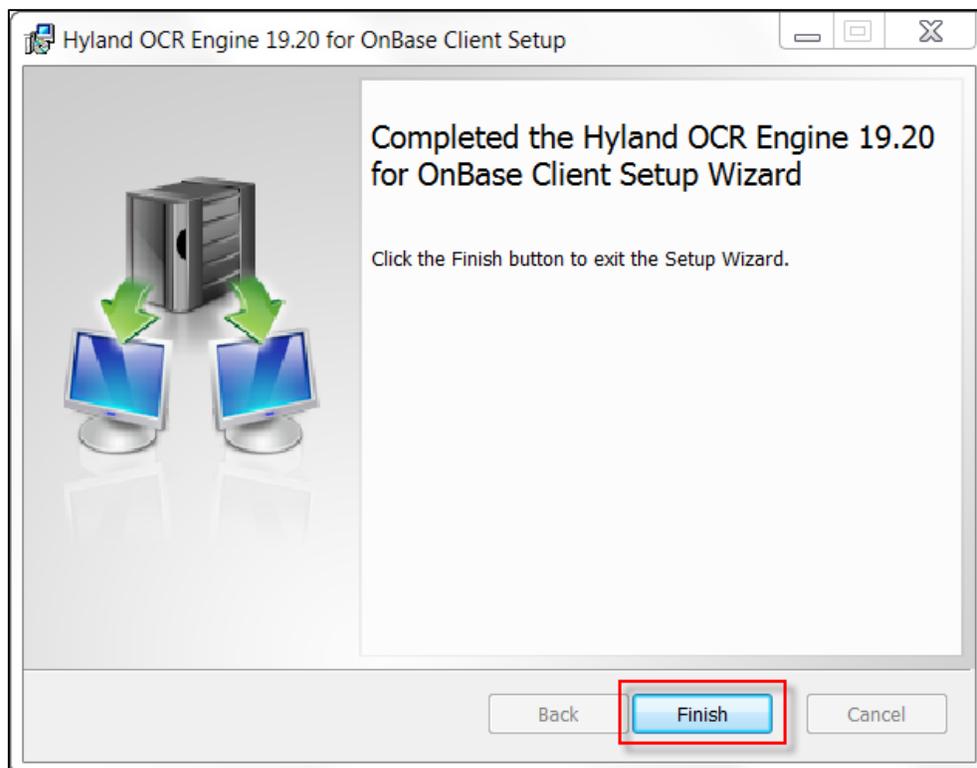
3. Click on **Next**.



4. Leave the default location and click on **Next** and **Install**.



5. Click on **Finish** to close the installer.



This completes the installation process of the OnBase Thick (legacy) Clients.

Setting Default Environment for Configuration and Thick Clients

The same client install can be used to access any OnBase environment (DMOPRD, DMOSTG, DMOTST, DMODEV) using the drop down selection on the login page.

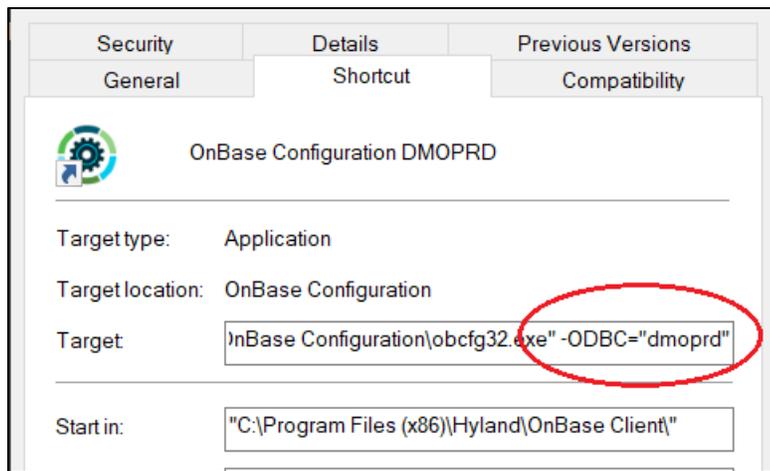


Alternatively, you can create shortcuts with the environment pre-selected. To do so, make a copy of the client shortcut for each environment. Then right-click the shortcut and choose Rename to enter a name to indicate which environment is used.

Then, right click again and choose Properties. In the Target field, go to the end of the path (after “.exe”) and enter **one** of the following for each shortcut:

- ODBC=”DMOPRD”
- ODBC=”DMOSTG”
- ODBC=”DMOTST”
- ODBC=”DMODEV”





Then choose Apply. This will allow the shortcut to populate the environment.

You can also prefill your username by adding

`-UN="USER000001"`

Where USER000001 is replaced with your OperID.

