



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 <u>Oracle ODBC driver install</u> and the second part will cover the <u>OnBase client installs</u>.

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)
 - o Certified OnBase Administrators
- Typical Functions:
 - o 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)
 - o 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 <u>OnBase System Administration Training</u>.

For other Thick client usage, access requirements will vary. Refer to the <u>Functional</u> <u>Security Group Definitions</u> 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 **<u>skip these steps</u>** and <u>go onto the step where you</u> <u>copy the ora config files</u> 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	Туре	Size
Uracle 12c Client x86	9/6/2016 5:18 PM	File folder	
📜 tnsnames	9/8/2016 10:27 AM	File folder	
冠 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	Туре	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**.



Select Installation Type	
Select Installation Type Software Updates Select Product Languages Perform Prerequisite Checks Summary Install Product Finish	What type of Installation do you want? IngtantClient (214.0MB) Installs Instant Client Software Administrator (1024.0MB) Installs the management console, management tools, networking services, utilities and basic client software. Buntime (735.0MB) Installs tools for developing applications, networking services and basic client software. Qustom Enables you to choose individual components to install.
Help	<back next=""> Install Cancel</back>

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

Download Software Update	s		
Select Installation Type Software Updates Select Product Languages Perform Prerequisite Checks	Download software updates for this installation. Software updates consis checks, PatchSet Updates (PSUs), and other recommended patches. Select one of the following options: Use Mv Oracle Support credentials for download	st of recommended updates to the	installer system requirement
Summary Install Product Finish	My Oracle Support <u>pa</u> ssword:	Proxy Se	ttings)
]	Use pre-downloaded software updates Location: Skip software updates		Browse
Help		< Back Next	> [nstall Cancel

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



Select Product Languages			
Select Installation Type Software Updates Select Product Languages Perform Prerequisite Checks Summary Install Product Finish	Select the languages in which your product will run. Available languages: Arabic Bengali Brazilian Portuguese Bulgarian Canadian French Catalan Croatian Czech Danish Dutch Egyptian English (United Kingdom) Estonian Finnish French German Greek Hebrew Hungarian Icelandic Indonesian Italian Japanese Korean Latin American Spanish Lobion	Selected languages: English	
Help		< Back	ext > Install Cancel

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**.

Specify Oracle Home User	
Select Installation Type Software Updates Select Product Languages Oracle Home User Selection Sectiv Installation Location Perform Prerequisite Checks Summary Install Product Finish	Use Windows Built-in Account or specify a standard Windows User Account (not an Administrator account) to install and configure the dracele Home. This account is used for running the Windows Services for the Oracle Home. Do not log in using this account to perform administrative tasks.
Help	<back next=""> Install Cancel</back>



8. 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**.

Specify Installation Location	
Select Installation Type Software Updates Select Product Languages	Specify an Oracle base path to place all Oracle software and configuration-related files. This location is the Oracle base directory. Qracle base: C:\app\client\ Browse
Oracle Home User Selection Specify Installation Location Perform Prerequisite Checks	Specify a location for storing Oracle software files. This location is the Oracle home directory. Software location: C:\app\client\product\12.1.0\client_1 Browse
Finish	
Help	< Back Next> Install Cancel

9. 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**.



Available Product Compone	ints		
Available Product Component Select Installation Type Software Updates Select Product Languages Oracle Home User Selection Secoly Installation Location Available Product Component Perform Prerequisite Check Summary Install Product Finish	Oracle SQLJ Oracle SQLJ Oracle Database Utilities Oracle Java Client SQL*Plus Oracle JDBC/THIN Interfaces Oracle Internet Directory Client Oracle Internet Directory Client Oracle Call Interface (OCI) Oracle Reserved Vid Oracle Reserved Vid Oracle Advanced Security Oracle Net Oracle Net Oracle Net Oracle Net Oracle Net Oracle Net Oracle Connection Manager Oracle Net Oracle Connection Manager Oracle Net Listener Oracle Connection Manager Oracle Net Listener Oracle Connection Manager Oracle Manager Oracle Manager Oracle Connection Manager Oracle Manager Oracle Connection Manager Oracle Manager Oracle Connection Manager Oracle Manager Ora	Component Name	DATABASE
1	Oracle Scheduler Agent Oracle Scheduler Agent Oracle Scheduler Agent Oracle Administration Assistant for Windows Oracle Provider for OLE DB Oracle Data Provider for NET Oracle Providers for ASP.NET	Beset Defau	ts gelect all De-Select all
Help		<back ne<="" th=""><th>ot> Install Cancel</th></back>	ot> Install Cancel

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.

Install Product	E.	
Select Installation Type	Progress 7%	
Select Product Languages Oracle Home User Selection		
Available Product Components	Status	
Perform Prerequisite Checks Summary	• Prepare • Copy files	Succeded
Install Product	Setup	Pending
		Details Retry Skip
◀ ₩₩		
Help		<back next=""> Install Cancel</back>

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	Туре	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	Туре	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

←	\rightarrow .	~ ·	↑ 📮 > This PC > Windo	ws (C:) > app > client	> product > 12.2.0 > clier	nt_2 → network → admin		
		ļ	ldap	Name		Date modified	Туре	Size
			lib	sample		3/4/2019 15:43	File folder	
	~		network	📄 sqlnet.ora		2/11/2011 16:22	ORA File	2 KB
	`	~	📙 admin	📄 tnsnames.ora		6/16/2017 10:12	ORA File	36 KB
			sample					
		>	install					

- a. If you already have a **sqinet.ora** file in that location, please overwrite it with the file from the zip file.
- b. 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 <u>UIS_DM_Support@cu.edu</u> 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.

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

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

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



	ODBC D	ata Source Administrator	— X—
l	Jser DSN	System DSN File DSN Drivers Tracing Conne	ection Pooling About
	System D	ata Sources:	
	Name	Driver	Add
			Remove
			Configure
		An ODBC System data source stores information ab the indicated data provider. A System data source	out how to connect to is visible to all users
		on this machine, including NI services.	
		OK Cancel	Apply Help

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

_	Name	Versio 🔺
	Microsoft Paradax-Traibar (* db.)	6 01 76
	Microsoft Text Driver (* bt * csv)	6.01.76
	Microsoft Text Troiber (* ht * cov)	6.01.76
	Microsoft Viewel FoxBra Driver	1.00.02
	Microsoft Visual FoxPro-Troibor	1.00.02
	Oracle in OraClient11a home1	1.00.02
	Oracle in OraClient12Home1_32bit	12.01.0
	SQL Server	6.01.76
	✓ III	•



4. 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 DMO	
Description	Cancel
TNS Service Name DMOI	DEV Help
User ID	Test Connection
Application Oracle Workarounds Enable Result Sets	SQLServer Migration Enable Query Timeout
Batch Autocommit Mode	Commit only if all statements succeed

- 5. Click on **OK** in the ODBC Data Source Administrator to close the dialog.
- 6. 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.
 - a. Enter "DMOPRD" for **Data Source Name** and **TNS Service Name**, then click **OK** to close the dialog.

Oracle ODBC Driver Configuration					
Data Source Name Description TNS Service Name User ID	DMOPRD DMOPRD ~	OK Cancel Help Test Connection			

b. Enter "DMOSTG" for **Data Source Name** and **TNS Service Name**, then click **OK** to close the dialog.



Oracle ODBC Driver Configuration					
Data Source Name Description TNS Service Name User ID	DMOSTG DMOSTG ~	OK Cancel Help Test Connection			

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

Oracle ODBC Driver Config	uration	
Data Source Name Description TNS Service Name User ID	DMOTST DMOTST	 OK Cancel Help Test Connection

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	Туре	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	Туре	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.

🖟 Hyland OnBase Client Setup					
Custom Setup Select the way you want features to be installed.					
Click the icons in the tree below to change the way fe	eatures will be installed.				
OnBase Client Mail Services OnBase Client API OnBase Client API X DCOM Configuration X E-mail Archive	This feature will install OnBase Client.				
EDI Framework	hard drive. It has 2 of 4 subfeatures selected. The subfeatures require 1196KB on your hard drive.				
Location: C:\Program Files (x86)\Hyland\OnBase Client\ Browse					
Re <u>s</u> et Disk <u>U</u> sage	Back Next Cancel				

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



🖟 Hyland OnBase Client Setup			
Data Source Select or enter a data source.			
Specify System ODBC			
	Back	Next	Cancel

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

🙀 Hyland OnBase Client Setup	
Client Options Specify the command line options.	
Additional command line parameters for Client shortcut:	_
Back	Cancel
DGLN	Cuncer



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	Туре	Size
OnBase Client OnBase Client OCR Client 19.20 OnBase Configuration	9/23/2016 5:06 PM 9/28/2016 12:12 PM 9/23/2016 5:07 PM	File folder File folder File folder	
Name	Date modified	Туре	Size
setup.exe By Hyland OnBase Configuration.msi	9/15/2016 9:56 AM 9/15/2016 9:56 AM	Application Windows Installer Package	7,811 342,952

3. Leave the default path and click Next.

🖟 Hyland OnBase Configuration Setup	
Destination Folder Click Next to install to the default folder or click Change to choose another.	
Install Hyland OnBase Configuration to:	
C:\Program Files (x86)\Hyland\OnBase Configuration\ Change	
Back Next	Cancel



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

🖟 Hyland OnBase Configuration Setup	
Data Source Select or enter a data source.	
Specify System ODBC DMODEV	
Back	Next Cancel

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**.

Image: OnBase Client 9/23/2016 5:06 PM Image: OnBase Client OCR Client 19.20 9/28/2016 12:12 PM Image: OnBase Configuration 9/23/2016 5:07 PM	File folder File folder File folder	

Name	Date modified	Туре	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.



🔀 Hyland OCR Engine 19.20 for OnBase Client Setup	
Destination Folder Click Next to install to the default folder or click Change to choose another.	
Install Hyland OCR Engine 19.20 for OnBase Client to:	
C:\Program Files (x86)\Hyland\OnBase Client\OCR\ Change	
Back Next Cancel	-

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"



Security	Details	Previous Versions
General	Shortcut	Compatibility
Ø On	Base Configuration DMOPF	RD
Target type:	Application	
Target location:	OnBase Configuration	
Target:	InBase Configuration\obcf	g32.exe" -ODBC="dmoprd"
Start in:	"C:\Program Files (x86)\Hy	rland\OnBase Client\"

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.

Security	Details	Previous Versions
General	Shortcut	Compatibility
On	Base Config DMOPRD	
Target type:	Application	
Target location:	OnBase Configuration	
Target	bcfg32.exe" -ODBC="DM0	0PR0"-UN="USER000001"
		\sim
Start in:	"C:\Program Files (x86)\H	lyland\OnBase Client\"
Shortcut key:	None	

