

OnBase[®] 17

Technical Requirements Overview for New Installations and Upgrades

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TECHNICAL REQUIREMENTS OVERVIEW FOR NEW INSTALLATIONS AND UPGRADES

Part 1 – OnBase Executive Summary	1
Part 2 – OnBase 17 Support Items of Note	1
General Support Items	1
Application Server	2
DMCoreX API	2
HTML-Based Forms	2
OnBase Desktop	2
Web Services Toolkit	2
Module-Specific Support Items.....	2
Advanced Capture	2
Agenda	3
Application Enabler	3
OCR	3
Windows User Account Control	4
Bar Code Generator	4
BPMN Modeler	4
Business Process Modeler	4
COLD/ERM	4
Connector for use with SAP ArchiveLink	5
Core Services Office Add-In	5
Directory Import Processor (Legacy)	5
Distributed Disk Services (DDS) for Linux	5
Document Composition	5
Document Composition for Microsoft Word	6
Email Archive for Microsoft Exchange	6
Front Office Scanning	6
OnBase Client Interface	6
Encryption Upgrade	6
FOSEnabler.ini Location	7
Gastrointestinal Capture and Reporting	7
Hyland Distribution Service	7
Configuration Settings	7
Using the Distribution Service with Document Distribution	8
Temporary File Cache	8
Hyland Server Side Installer	8
Upgrading	8
Rollback	9
Hyland Services Release Script for Kofax Capture	9
Image Document Composition	9
Instant Viewer for Merge Healthcare	9
Integration for AutoStore Route to OnBase	9

Integration for eCopy ShareScan OP	10
Integration for Epic	10
Integration for Esri ArcGIS Server	11
Integration for Harland CRM	11
Integration for Microsoft Outlook 2007/2010/2013	11
Configuration	11
Deprecated Versions	12
Integration for the ScanSnap Network fi-6010N iScanner	12
Integration for Sentillion Vergence	12
Integration for Sharp MFP	12
Intelligent Capture for AP	12
Data Capture Server Windows Service	12
Licensing	13
Regular Expressions	13
Media Server	13
Medical Pop Integrations	14
DeficiencyPop	14
Application Server.....	14
Patient Window.....	14
Automated Upgrade	14
Deprecated Integrations	14
Medical Records Management	15
Medical Records Web Client	15
Mobile Workflow for BlackBerry	15
Office Business Application for 2007/2010/2013/2016	15
Licensing	15
Deprecated Versions	15
OnBase Mobile Access for BlackBerry Phone	16
Optical Character Recognition (OCR)	16
Platter Management	16
RAC Administration	16
Release of Information (ROI) Unity	17
Revenue Cycle Management (RCM)	17
Subscription Server	17
Unity API	17
Unity Client	17
Configuration File	18
Citrix or Remote Desktop Environment	18
Printing Large Documents With Notes	18
Service Mode	18
Unity Forms	19
Web Browser Support	19
Default Theme	19
Universal Scope Capture	19
Virtual Print Driver	19

Web Server	19
Updating Forms Using LoginFormProc	19
Web Services Publishing	20
Workflow	20
Configuration	20
Upgrading With Workflow and WorkView	20
Call Web Service using MS SOAP Toolkit Action	20
Formatted Notifications	20
Workflow Timer Service	21
WorkView	21
Upgrading From Versions of OnBase Prior to OnBase 14	21
Password Protection	21
System Tasks and System Events	21
Supported Web Browsers	22
View Editor	22
View Updater	22
Web Browser Support Items for the Web Server.....	22
Chrome Support	23
Edge Support	23
Firefox Support	23
Internet Explorer Support	23
Safari Support	23
Third-Party Software Support Items	23
Microsoft .NET Framework	23
Incremental Parallel Upgrade Considerations	24
Microsoft Office XP Support	24
Microsoft Office 2003 Support	24
Microsoft Office 2007 Support	25
Microsoft Office 2010 Support	25
Microsoft Office 2013 Support	26
Microsoft Office 2016 Support	26
Microsoft Office 365 Support	27
Microsoft Outlook 2003 Support	27
Microsoft Outlook 2007 Support	27
Microsoft SharePoint Support	28
Adobe Acrobat Reader Compatibility	28
Datawatch Monarch	28
Datawatch Report Mining Server (Datawatch RMS)	28
Miscellaneous Support Items.....	28
Running OnBase as a Windows Service	28
Part 3 – OnBase 17 Databases	29
Minimum OnBase Database Schema Version	29
Databases Supported	29
Microsoft SQL Server	29
Oracle	30

Sybase SQL Anywhere	30
Database Client / Server Version Compatibility	30
Unicode Database Support	31
Support Items of Note	32
64-Bit Integer Field Support	32
Support Items of Note	33
Part 4 – OnBase 17 Operating Systems	34
Supported Desktop Operating Systems	34
Additional OnBase Client Operating System Requirements	34
Authenticode Signatures	35
Windows User Account Control Statement	35
Supported Mobile Operating Systems	36
Android Support	36
iOS Support	36
Testing of Major and Minor iOS Version Updates After the OnBase Release	36
iOS Application Transport Security Requirements	37
Windows Support	37
Windows Phone Support	37
Updating OnBase Mobile Applications	38
Part 5 – OnBase 17 Client Hardware Requirements	38
Client Retrieval Workstation Hardware Requirements	38
OCR Processing Workstation Hardware Requirements	39
CD/DVD/Blu-ray Authoring Workstation Hardware Requirements	39
Client Scanning Workstation Hardware Requirements	40
Part 6 – OnBase 17 Web/Application Server & Core Services Requirements	40
Server Hardware and Browser Requirements	40
Microsoft Internet Information Services (IIS)	42
64-Bit Application Server Hardware and Browser Requirements	42
Full-Text Indexing Server for Autonomy IDOL Requirements	43
Web Client Hardware and Browser Requirements	44
Edge Browser Support	45
Safari Browser Support	45
Unity Client Hardware and Browser Requirements	45
Unity Client Scanning Workstation Hardware Requirements	46
Part 7 – International Support in OnBase 17	47
International Support Items	47
Issue with Windows Regional Options	47
Microsoft .NET Framework	47
Infragistics	48
Note About Arabic Characters	48
Web Client Help Files	48
Supported Languages and Cultures	48
General Support Items	50
Optical Character Recognition (OCR)	50

Module-Specific Support Items.....	50
Full-Text Indexing Server for Autonomy IDOL	50
Report Mining	50
Interface Translations.....	50
Limitations	51
Unsupported Modules and Features	51
Custom Queries	51
Folders	51
Unity Forms	51
Workflow	51
Part 8 – Technical Support and Upgrade Information for OnBase 17.....	52
Commitment to Fix Defects for Customers Under Maintenance	52
Upgrading OnBase	52
Upgrade Schedule	53
Hyland Software Recommendations Regarding Product Upgrades	53
Recommended OnBase Upgrades	53
Things You Need To Do Before Upgrading.....	53
Things You Should Do Before Upgrading	53
Password Configuration Considerations	54
Password Policy Encryption	54
Validating the Upgrade	55
Upgrading From OnBase 13 or Earlier	56
Upgrading From OnBase 12 or Earlier	56
Upgrading From OnBase 11.0 or Earlier	56
Upgrading From OnBase 10.0 or Earlier	57
Upgrading From OnBase 3.6 or Earlier	57
OnBase User Security Modifications as a Result of Upgrade	57
Upgrading From OnBase 10.0 or Earlier	57
Module-Specific Upgrade Information.....	57
ActiveX Controls	57
AutoFill Keyword Sets	58
Document Knowledge Transfer	58
Hyland OCR Engine	58
Integration for Epic	58
Medical Records Unity Client	59
Print Template Security	59
PDF Input Filter	59
PDFNet	60
Records Management	60
StatusView	60
Workflow	61
WorkView	61
OnBase Database Versions.....	61
Compatibility with Earlier Database Versions	62
Third-Party Software Compatibility.....	62

About Virtual Environments..... 62

64-Bit Support Statement 63

INI File 63

 Previous File Location/File Name 64

 Location 64

 INI Considerations in a Citrix and Microsoft Windows Remote Desktop Environment 64

 Editing the INI File 65

Part 9 – API Support for OnBase 17..... 65

TECHNICAL REQUIREMENTS OVERVIEW FOR NEW INSTALLATIONS AND UPGRADES

Part 1 – OnBase Executive Summary

Hyland Software is pleased to announce the release of OnBase 17. OnBase 17 features enhanced functionality and new modules specifically developed to meet end users' business needs.

This document is offered as a companion guide to the general documentation of OnBase 17 in an effort to highlight technical requirements for OnBase 17, installation requirements for which we would like to provide additional visibility, and technical choices that will need to be made for specific types of installations.

Unless otherwise noted, this document covers the requirements and support items that are accurate as of the day of the OnBase 17 release; post-release products and enhancements are not included. Announcements regarding post-release information will be made at the appropriate times through official channels (e.g., technical communication emails, the OnBase Community, etc.).

Previous versions of this document included the following types of information, which have also been moved to official communications channels:

- Extensive lists of enhancements made to existing modules since the release of the previous version of OnBase. Beginning with OnBase 14, this information has been moved to the OnBase Community (<http://www.onbase.com/community>).
- Summaries of the product modules newly added to the OnBase product suite. Beginning with OnBase 15, this information has been moved to the OnBase Community (<http://www.onbase.com/community>).

However, note that the enhancements upon which new installations and upgrades depend for successful implementation are still covered in [Part 2 – OnBase 17 Support Items of Note](#), below.

Part 2 – OnBase 17 Support Items of Note

General Support Items

The following subsections contain important considerations that should be reviewed before installing or upgrading to OnBase 17. These considerations could potentially impact several different modules in your OnBase solution.

Application Server

As of OnBase 17, Hyland Software recommends the 64-bit Application Server for most installations, as it better uses the resources of 64-bit operating systems. However, a 32-bit Application Server must be used for systems with Unity Scripts that reference custom, 32-bit-only, native libraries or a 32-bit-only Microsoft .NET Framework DLL.

For more information on the differences between a 64-bit and a 32-bit Application Server, see the **Application Server** module reference guide.

DMCoreX API

Beginning in OnBase 15, the DMCoreX API is no longer supported and has been removed from the OnBase product suite. If you are using the DMCoreX API and upgrading to OnBase 17, you will be required to either convert to built-in functionality or use the Unity Integration Toolkit.

HTML-Based Forms

In OnBase 17, all HTML-based forms (e.g., E-Forms, Virtual E-Forms, user forms in Workflow, HTML Custom Queries, and HTML documents) must be compliant with HTML standards.

OnBase Desktop

As of OnBase 17, the OnBase Desktop is no longer supported and has been removed from the OnBase product suite. If you are using the OnBase Desktop and upgrading to OnBase 17, you will be required to use the Unity Client and the Unity Automation API to fulfill your needs for interface features and integrations, respectively.

Web Services Toolkit

Beginning in OnBase 15, the Web Services Toolkit is no longer supported and has been removed from the OnBase product suite. If you are using the Web Services Toolkit and upgrading to OnBase 17, you will be required to either convert to built-in functionality or use the Unity Integration Toolkit.

Module-Specific Support Items

The following subsections contain important considerations that should be reviewed before installing or upgrading to OnBase 17. These considerations are presented on a module-by-module basis. Ensure that you review the sections pertaining to the modules currently in your OnBase solution. In many cases, the module's documentation will contain further information on these support items.

Advanced Capture

If your OnBase solution is configured to use Institutional Databases, Advanced Capture forms can be created at the institution level or at a global level.

- Institution level forms are only available to the institution that they were created for.

- Global level forms are available to all institutions that are part of your OnBase solution.

Non-super users can only create and configure Advanced Capture forms for their own institutions.

Super users can configure Advanced Capture forms for any institution, provided that the institutions using the forms have access to the Document Types and Keyword Types associated with the form. Super users can also configure global Advanced Capture forms.

It is considered a best practice for super users to create only global Advanced Capture forms. Non-super users should create all institution level Advanced Capture forms.

Agenda

If you are upgrading from OnBase 15 or earlier, Agenda Placeholders and templates are no longer supported or available in Document Composition. This includes the ability to configure Agenda Placeholders, to generate documents from previously created Agenda templates, and to retrieve Agenda templates created in Document Composition.

For more information on how to configure Agenda templates, see the **Agenda** module reference guide.

Application Enabler

To use Application Enabler in OnBase 17, the Unity Client's Service Mode must be enabled. For more information, see [Service Mode on page 18](#).

OCR

In Internet Explorer 11 (IE11), fonts are automatically rendered using ClearType, which is not recognized by the 32-bit version of the Hyland OCR Engine for the OnBase Client. However, ClearType is recognized by the 64-bit version of the Hyland OCR Engine for the Data Capture Server. For this reason, Application Enabler's OCR functionality can only be used with IE11 when deploying the 64-bit version of the OCR engine through the Data Capture Server.

Windows User Account Control

In Windows 7 and later Windows operating systems, Windows User Account Control (UAC) is used to limit the ability of standard users to make global system changes to a workstation and prevents software from making changes to protected areas, such as the Program Files directory. Application Enabler is supported when Windows UAC is enabled. However, to use Application Enabler when Windows UAC is enabled, your enabled third-party applications are required to be running at the same UAC level as Application Enabler. If you are enabling an HTML-based application, Internet Explorer's **Enable Protected Mode** option cannot be selected. When this option is not selected, Internet Explorer runs at the default UAC level, which is also the same level as Application Enabler.

Note: Application Enabler's OCR functionality cannot be used when Windows UAC is enabled, even when running your enabled third-party application at the same Windows UAC level as Application Enabler.

Bar Code Generator

If you are upgrading from a version of OnBase prior to OnBase 16, by default, the Bar Code Generator application is configured to automatically launch the Application Enabler module upon startup. To prevent errors in launching Application Enabler, you must ensure that it is properly installed to work in conjunction with the Bar Code Generator. Alternatively, you can disable the automatic launch of Application Enabler within the Bar Code Generator's startup options. For more information, see the **Bar Code Generator** module reference guide.

Beginning in OnBase 16, by default, new installations of the Bar Code Generator are configured not to launch Application Enabler upon startup.

BPMN Modeler

The BPMN Modeler is being deprecated for eventual removal from the OnBase product suite. The BPMN Modeler is supported in OnBase 17; however, it will not be available in OnBase 18 and subsequent versions of OnBase.

Business Process Modeler

Beginning in OnBase 17, the Business Process Modeler is no longer supported and has been removed from the OnBase product suite.

COLD/ERM

Beginning in OnBase 16, the way COLD processes files with multi-byte characters has changed. Any COLD processing format created in an earlier version of OnBase used to process files with multi-byte characters must be recreated upon upgrading to OnBase 17.

Connector for use with SAP ArchiveLink

Beginning in OnBase 17, the OnBase Desktop has been replaced with the Unity Client for use with SAP ArchiveLink. If you are using the Connector for use with SAP ArchiveLink module and upgrading to OnBase 17, you will be required to install the Unity Client for use with SAP ArchiveLink and configure it as an OLE application in SAP. For more information, see the **Connector for use with SAP ArchiveLink** module reference guide.

Core Services Office Add-In

Beginning in OnBase 13, the Core Services Office Add-In is no longer supported.

If you are using the Core Services Office Add-In and upgrading to OnBase 17, Hyland Software recommends using the Office Business Application for 2010, Office Business Application for 2013, or Office Business Application for 2016, depending on which version of Microsoft Office you are using.

Caution: For assistance with deploying the correct version of the Office Business Application for the version of Microsoft Office that is installed on each workstation, see the Office Business Application documentation.

Directory Import Processor (Legacy)

Beginning in OnBase 14, the legacy Directory Import Processor is no longer supported and has been removed from the OnBase product suite. If you are using the legacy version of the Directory Import Processor and upgrading to OnBase 17, you will be required to convert to the current version of the Directory Import Processor.

Distributed Disk Services (DDS) for Linux

Beginning in OnBase 17, Distributed Disk Services (DDS) for Linux is no longer supported and has been removed from the OnBase product suite. If you are using DDS for Linux and upgrading to OnBase 17, you will be required to use DDS for Windows to fulfill your needs.

Document Composition

Support for the Template Builder for Office 2007 is being deprecated for eventual removal from the Document Composition module. The Template Builder for Office 2007 is supported in the Document Composition module in OnBase 17; however, it will not be available in OnBase 18 and subsequent versions of OnBase.

If you are currently using Document Composition with Office 2007, Hyland Software recommends using the Document Composition Template Builder for Office 2010 or later to fulfill your needs.

Document Composition for Microsoft Word

Beginning in OnBase 14, the Document Composition for Microsoft Word module is no longer supported and has been removed from the OnBase product suite. If you are using the Document Composition for Microsoft Word module and upgrading to OnBase 17, you will be required to use the Document Composition module.

Before upgrading to OnBase 17, you will need to convert your templates from version 1 to version 2 so that they can be used with the Document Composition module. To obtain the Document Composition Template Converter, contact your first line of support.

Email Archive for Microsoft Exchange

Beginning in OnBase 17, the Email Archive for Microsoft Exchange module is no longer supported and has been removed from the OnBase product suite. If you are using the Email Archive for Microsoft Exchange module and upgrading to OnBase 17, contact your OnBase solution provider for an on-demand utility to export your data to another email archival solution.

Front Office Scanning

OnBase Client Interface

Beginning in OnBase 14, the Front Office Scanning for the OnBase Client interface is no longer supported and has been removed from the Front Office Scanning module. If you are using the Front Office Scanning for the OnBase Client interface and upgrading to OnBase 17, you will be required to use the Front Office Scanning standalone interface to fulfill your needs. The Front Office Scanning standalone interface also requires an OnBase Application Server.

After upgrading, if you attempt to launch Front Office Scanning from the old interface's former access point (i.e., in the OnBase Client, click **Processing | Front Office Scanning**), the Front Office Scanning standalone interface will be launched.

Encryption Upgrade

As of OnBase 15, Front Office Scanning uses a more advanced encryption method, which makes encrypted documents and Data Sets from previous versions incompatible with the newer Front Office Scanning client.

Before upgrading from Front Office Scanning 14 or earlier, you must process all encrypted temporary documents and encrypted data sets in the earlier version of Front Office Scanning.

In addition, any default user login credentials or signatures on file that have been encrypted in Front Office Scanning 14 or earlier must be recreated and re-encrypted in the newer version of Front Office Scanning.

FOSEnabler.ini Location

Beginning in OnBase 14, the **FOSEnabler.ini** file must be stored in the Front Office Scanning workstation's **C:\ProgramData\Hyland Software** folder. If you are upgrading from a version of OnBase prior to OnBase 14 and you need to use the Front Office Scanning Enabler Service, you must move your **FOSEnabler.ini** file from its existing location (e.g., **C:\Windows**) to the Front Office Scanning workstation's **C:\ProgramData\Hyland Software** folder.

Gastrointestinal Capture and Reporting

Beginning in OnBase 17, users must belong to a User Group with the **Universal Scope Capture Client** product right to access the GI Unity Client. If you are upgrading from a version of OnBase prior to OnBase 17, users will no longer be able to access the GI Unity Client until an administrator assigns them to a User Group with the **Universal Scope Capture Client** product right.

Hyland Distribution Service

All Distribution Servers should be upgraded to OnBase 17 when the OnBase database is upgraded to OnBase 17.

The OnBase 17 Distribution Service can send notifications generated in earlier OnBase versions. However, Distribution Service versions 13 and older cannot send notifications generated in OnBase 17 clients; any notifications generated in OnBase 17 clients will not be sent until the Distribution Service is upgraded to OnBase 17.

Configuration Settings

As of OnBase 17, mail server configuration settings have been moved from the Distribution Service configuration file into the database. To configure the Distribution Service for a data source, in the OnBase Configuration module, click **Utils | Distribution Service Settings**. If an old configuration is present when you upgrade to OnBase 17 and start the Distribution Service, some configuration settings may be inserted into the database. To detect any issues that might result from migrating configuration settings into the database, run the Diagnostics Console on the same machine running the Distribution Service.

To ensure a successful migration of configuration settings during the upgrade process:

1. Create a backup of the existing Distribution Service configuration file (**Hyland.Core.Distribution.NTService.exe.config**) outside of the currently installed directory.
2. Install the OnBase 17 Distribution Service.
3. Overwrite the newly created, default configuration file with the backup file created in step 1.
4. In the Windows Services console, start the Hyland Distribution Service.
5. In the OnBase Configuration module, click **Utils | Distribution Service Settings** and verify that the configuration file settings were successfully copied over.

Using the Distribution Service with Document Distribution

If you are upgrading from a version of OnBase prior to OnBase 15, and you are using the Distribution Service with Document Distribution, new configuration steps are required. If your system is configured with the Global Client Setting **Use Email Distribution Service for Document Distribution** enabled, a temporary file cache must be configured and associated with the Distribution Service.

Temporary File Cache

In addition to the Document Distribution scenario described above, a temporary file cache must also be configured and associated with the Distribution Service in the following scenarios:

- If you are upgrading from a version of OnBase prior to OnBase 15, and you are using Workflow in the Classic OnBase Client interface to send emails with attachments
- If you are upgrading from a version of OnBase prior to OnBase 16, and you are using formatted notifications and/or WorkView notifications with content greater than 64 KB.

Hyland Server Side Installer

With OnBase 16, the Hyland Server Side Installer has been deprecated in favor of individual stand-alone installers for each of the modules previously installed using the Hyland Server Side Installer. This change was made to allow for Incremental Parallel Upgrades of the modules installed. It also reduces the overall size of the installers by allowing system administrators to deploy only the MSIs for modules they want to install.

Upgrading

If a module is upgraded using the stand-alone installer, but was originally installed using the Hyland Server Side Installer, that feature is removed from the Hyland Server Side Installer upon upgrade. To change or remove the upgraded installation, the stand-alone installer must be used.

If all features have been removed from the Hyland Server Side Installer during upgrades using the stand-alone installers, the Hyland Server Side Installer is uninstalled automatically. This does not affect the installations that were performed with the stand-alone installers.

Rollback

The Hyland Server Side Installer cannot be used to modify, uninstall, or overwrite installations originally performed using a stand-alone installer. If it is necessary to perform a rollback of modules installed using a stand-alone installer, only those specific modules that were first uninstalled using the stand-alone installer can be reinstalled using the Hyland Server Side Installer.

Caution: If a module is installed using a stand-alone installer and is reinstalled or modified using the Hyland Server Side Installer, without first uninstalling the stand-alone version using the stand-alone installer, the installation may not function or may not function as expected.

Hyland Services Release Script for Kofax Capture

If you are upgrading to OnBase 17, and you are using Kofax Capture 11 or later, note that the Hyland Services Release Script for Kofax Capture is no longer fully supported. Beginning in OnBase 15 SP 1, new customers will be required to use the Document Import Processor module to access an equivalent feature set. Existing customers using Kofax Capture 10 or earlier can continue to use the Hyland Services Release Script for Kofax Capture to fulfill their needs.

Image Document Composition

Beginning in OnBase 13, the Image Document Composition module is no longer supported and has been removed from the OnBase suite of products.

Instant Viewer for Merge Healthcare

The Instant Viewer for Merge Healthcare module is being deprecated for eventual removal from the OnBase product suite. The Instant Viewer for Merge Healthcare module is supported in OnBase 17; however, it will not be available in OnBase 18 and subsequent versions of OnBase.

Integration for AutoStore Route to OnBase

Beginning in OnBase 15, the Integration for AutoStore Route to OnBase module is no longer supported and has been removed from the OnBase suite of products. If you are using the Integration for AutoStore Route to OnBase module and upgrading to OnBase 17, depending on your solution, you will be required to use one or more of the following modules:

- Document Import Processor
- Integration for Canon uniFLOW
- Integration for eCopy ShareScan
- Integration for HP Connect
- Integration for Konica Minolta
- Integration for Kyocera
- Integration for Sharp MFP
- Integration for Xerox MFP

For more information on which of the replacement modules above are appropriate for your solution, contact your solution provider.

Integration for eCopy ShareScan OP

Beginning in OnBase 15, the Integration for eCopy ShareScan OP module is no longer supported and has been removed from the OnBase suite of products. If you are using the Integration for eCopy ShareScan OP module and upgrading to OnBase 17, you will be required to use the Integration for eCopy ShareScan module.

Before upgrading to OnBase 17, you will need to install a version of eCopy ShareScan that is supported by the Integration for eCopy ShareScan module (e.g., version 5.0, 5.1, or 5.2). You will also need to unregister the Integration for eCopy ShareScan license consumed by the previous integration; this license will be automatically reused when a user first logs in to the Integration for eCopy ShareScan. Additionally, note that configuration settings from the Integration for eCopy ShareScan OP module cannot be transferred to the Integration for eCopy ShareScan module.

Integration for Epic

If you are upgrading from a version of OnBase prior to OnBase 16, you must update the Scan Acquisition Server ProgID in Epic. If the Scan Acquisition Server ProgID is not updated when OnBase is upgraded, then integrated scanning with Epic will not work.

Beginning in OnBase 16, the Scan Acquisition Server ProgID must reflect the Epic version as shown in the following table:

Epic Version	ProgID for Scan Acquisition Server
Epic 2017	OBEPicScanWrp83.OBEPicScanWrapper
Epic 2015	OBEPicScanWrp82.OBEPicScanWrapper
Epic 2014	OBEPicScanWrp81.OBEPicScanWrapper

Integration for Esri ArcGIS Server

Beginning in OnBase 15, the Integration for Esri ArcGIS Server module has been renamed as the Integration for Esri module. If you are using the Integration for Esri ArcGIS Server module and upgrading to the Integration for Esri module in OnBase 17, consider the following:

- As of OnBase 15, the GIS HTML5 Sample Application and the GIS Mobile Sample Application are no longer supported. To access this functionality after upgrading, you must use the GIS Web API.
- The GIS Silverlight Sample Application, the Silverlight Esri Viewer, and the Silverlight Cityworks Plugin have been replaced with their JavaScript counterparts: the OnBase GIS Web API Test Harness/Sample Application, the OnBase Widget for Esri's Application Builder, and the OnBase Widget for Cityworks JavaScript Map, respectively.
- To make use of the OnBase Mapping functionality, the ArcGIS Runtime SDK 10.2.7 must be installed on any local workstations that will use Unity Mapping, as well as on the Application Server itself. An ArcGIS Online (AGOL) account is also required to access advanced options for OnBase Mapping functionality in Unity.
- As of OnBase 17, importing, static linking, downloading a zip file, and Workflow access via the WCF service or GIS Web API will require a session.
- As of OnBase 16, all configuration that is done using the GIS Configuration Utility will be saved into the database. This includes configuring Layer Mappings for the GIS Web API and ArcMap integration, as well as configuration for OnBase Mapping. Configuration XML files from previous versions can be saved into the database using the import functionality of the GIS Configuration Utility.
- As of OnBase 16, configuration can be created at a User Group level.

Integration for Harland CRM

The Integration for Harland CRM module for OnBase 17 is not available for the initial OnBase 17 release. If you are using the Integration for Harland CRM module and upgrading to OnBase 17, you will be required to use the Integration for Harland CRM for OnBase 16 in conjunction with the OnBase 16 Desktop until the Integration for Harland CRM for OnBase 17 becomes available. Please contact your OnBase solution provider for further information on the availability of the Integration for Harland CRM module for OnBase 17.

Integration for Microsoft Outlook 2007/2010/2013

Configuration

Beginning in OnBase 14, the Integration for Microsoft Outlook 2007, 2010, and 2013 modules store user-configured settings in the database. If you are upgrading any of these modules from a version of OnBase prior to OnBase 14, when you first log in after the upgrade, you will be required to reconfigure any previously configured Auto Import folders and customized ribbon settings.

Deprecated Versions

The Integration for Microsoft Outlook 2007 is being deprecated for eventual removal from the OnBase product suite. The Integration for Microsoft Outlook 2007 is supported in OnBase 17; however, it will not be available in OnBase 18 and subsequent versions of OnBase.

If you are currently using the Integration for Microsoft Outlook 2007, Hyland Software recommends using the Integration for Microsoft Outlook 2010 or later to fulfill your needs.

Integration for the ScanSnap Network fi-6010N iScanner

Beginning in OnBase 15, the Fujitsu fi-6000N scanner is no longer supported. This product reached end-of-life status with Fujitsu in 2008. The ScanSnap Network fi-6010N iScanner continues to work in OnBase 17, though it has also reached its end of life at Fujitsu. If you wish to continue using a Fujitsu fi-6000N device, however, you can do so by maintaining a version of the Application Server from OnBase 14 or earlier.

Integration for Sentillion Vergence

Beginning in OnBase 17, the Integration for Sentillion Vergence module is no longer supported and has been removed from the OnBase suite of products.

Integration for Sharp MFP

Due to an architectural difference between OnBase 17 and the Sharp OSA (version 2 and later), the Integration for Sharp MFP requires a dedicated OnBase 9.2.0 Application Server. The Sharp MFPs and your OnBase-Sharp Web Server can communicate with this OnBase 9.2.0 Application Server, and this OnBase 9.2.0 Application Server can be used to exchange data with the remainder of your OnBase 17 solution. You must ensure that the Integration for Sharp MFP's **Sharp** virtual directory is configured to use .NET 3.5, while the virtual directory for your OnBase Application Server is configured to use .NET version 4.0.30319.

Because .NET 3.5 is an extension of .NET 2.0, you must ensure .NET 3.5 is installed on the server hosting the **Sharp** virtual directory, but you must set the **ASP.NET version** drop-down list on the **ASP.NET** tab of the **Sharp** virtual directory's **Properties** dialog box to **2.0.50727**.

In 2016, Sharp released a new suite of products that use a technology called AIP Connect. These products are compatible with OnBase 17.

Intelligent Capture for AP

Data Capture Server Windows Service

When upgrading to OnBase 16 from any previous version, you must first re-confirm any pre-existing Intelligent Capture for AP mappings in the Data Capture Configuration Tool before running the Data Capture Server Windows Service. This ensures that the database is appropriately updated for the current version of Intelligent Capture for AP processing.

Additionally, while multiple Data Capture Servers can operate in an Incremental Parallel Upgrade Process environment, the individual products using Intelligent Capture for AP features (e.g., Data Capture Server, Application Server, and Unity Client) must all be on the same version of OnBase.

Licensing

Beginning in OnBase 16, the Intelligent Capture for AP license is site-based, and the amount of volume being processed is recorded in the database. If you are upgrading from a version of OnBase prior to OnBase 16, you must remove the workstation registrations for any older versions of the license.

Beginning in OnBase 17, your Intelligent Capture for AP solution must maintain an Internet connection to connect to a Global Cloud Services (GCS) server in order to report volume statistics to your solution provider.

Regular Expressions

As of OnBase 14, the default regular expression values with capture groups have been updated to enhance the vendor identification process. If you are upgrading from a version of OnBase prior to OnBase 14 and you need to use the new regular expression values, you must first remove the existing regular expression values from IDs 51 to 100 in the Regular Expression Library.

Note: Regular expression ID values must be retrieved from the database. For more information, contact Database Services.

Media Server

When using Internet Explorer 11 with Windows 7 to view media (video or audio) files through the OnBase Media Server, Adobe Flash Player (Flash) version 21 or later is required.

Flash is not required when:

- using other supported Web browsers and/or other supported operating systems to view media files through the Media Server
- viewing OnBase media files outside of the Media Server.

Note: When viewing media files through the Media Server, the Unity Client uses Internet Explorer 11 embedded within the client.

Note: When viewing media files through the Media Server using Internet Explorer, it is important to disable Compatibility View.

Medical Pop Integrations

DeficiencyPop

If you are using the DeficiencyPop integration, and you are upgrading from a version of OnBase prior to OnBase 16, consider the requirements outlined in the following sections. For more information on changes to DeficiencyPop, see the **DeficiencyPop** module reference guide.

Application Server

As of OnBase 16, DeficiencyPop requires the OnBase Application Server in order to communicate with the database and retrieve documents from disk groups. For information about installing the OnBase Application Server, see the **Application Server** module reference guide.

Patient Window

As of OnBase 16, DeficiencyPop uses the OnBase Patient Window to provide a comprehensive view of a patient record when a physician is looking for additional information to satisfy a deficiency. DeficiencyPop no longer uses the legacy ChartPop, LongitudinalPop, or MRNPop integrations.

The Patient Window is not a technical requirement for the completion of deficiencies, but it is necessary to provide physicians access to the patient record in DeficiencyPop.

Automated Upgrade

As of OnBase 16, DeficiencyPop is a different Web application from previous versions. As a result, you cannot use an automated installer to upgrade DeficiencyPop from a version of OnBase prior to OnBase 16.

If you are upgrading from a version of OnBase prior to OnBase 16, be sure to uninstall the old version of DeficiencyPop before installing the new version.

Deprecated Integrations

As of OnBase 15, the following Medical Pop integrations are not supported for new installations or upgrades:

- ChartPop
- LongitudinalPop
- MRNPop

If you are using these integrations and upgrading to OnBase 17, you will be required to do one of the following:

- Use the OnBase Patient Window to fulfill your Medical Records integration needs.
- Perform an Incremental Parallel Upgrade, where the ChartPop, LongitudinalPop, and MRNPop integrations remain on an earlier version of OnBase.

Medical Records Management

As of OnBase 15, the ability to manually create medical charts has been removed from the OnBase Configuration module. If you need to manually create a medical chart, contact your first line of support. Hyland Software recommends using the HL7 Module to create medical charts in production environments.

Medical Records Web Client

As of OnBase 12, the Medical Records Web Client is no longer supported.

For both upgrades and new installations, use the Medical Records Unity Client for chart retrieval, analysis, reanalysis, coding, completion, correction, administration, and Workflow.

Mobile Workflow for BlackBerry

As of OnBase 16, the Mobile Workflow for BlackBerry module is no longer supported and has been removed from the OnBase suite of products. If you are using the Mobile Workflow for BlackBerry module and upgrading to OnBase 17, you will be required to use one of the following modules:

- OnBase Mobile Access for Android
- OnBase Mobile Access for iPad
- OnBase Mobile Access for iPhone
- OnBase Mobile Access for Windows
- OnBase Mobile Access for Windows Phone.

Office Business Application for 2007/2010/2013/2016

Licensing

With the release of OnBase 11.0.0, Hyland Software has introduced new licenses to support the use of the Office Business Application modules in Citrix and Remote Desktop environments. If you are upgrading to OnBase 17 and using the Office Business Application for 2007, 2010, 2013, or 2016 in a Citrix or Remote Desktop environment, these new licenses will need to be installed before deploying these modules. See the "Licensing" section in the Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide for more information on licensing in a Remote Desktop environment.

Deprecated Versions

The Office Business Application for 2007 is being deprecated for eventual removal from the OnBase product suite. The Office Business Application for 2007 is supported in OnBase 17; however, it will not be available in OnBase 18 and subsequent versions of OnBase.

If you are currently using the Office Business Application for 2007, Hyland Software recommends using the Office Business Application for 2010 or later to fulfill your needs.

OnBase Mobile Access for BlackBerry Phone

As of OnBase 16, the OnBase Mobile Access for BlackBerry Phone module is no longer supported and has been removed from the OnBase suite of products. If you are using the OnBase Mobile Access for BlackBerry Phone module and upgrading to OnBase 17, you will be required to use one of the following modules:

- OnBase Mobile Access for Android
- OnBase Mobile Access for iPad
- OnBase Mobile Access for iPhone
- OnBase Mobile Access for Windows
- OnBase Mobile Access for Windows Phone.

Optical Character Recognition (OCR)

Beginning in OnBase 16, the Asian Language for OCR license is required to configure and process OCR formats that use Japanese, Korean, Simplified Chinese, or Traditional Chinese settings.

If you are using any of these languages for OCR processing, and you are upgrading from a version of OnBase prior to OnBase 16, you must be licensed for Asian Language for OCR.

Platter Management

Disk Groups configured to use the original implementation of **Encrypted Disk Group - AES 256** should be migrated to the current **Encrypted Disk Group - AES 256 v2** implementation. 256-bit AES encryption was introduced in OnBase 14 and renamed to **Encrypted Disk Group - AES 256 v1** in OnBase 14 SP 2.

Caution: OnBase 13 and earlier clients cannot archive or read documents stored in a 256-bit AES encrypted Disk Group. Before configuring **Encrypted Disk Group - AES 256 v2** make sure all clients and the OnBase Application Server are version 14 SP 2 or higher.

RAC Administration

Beginning in OnBase 16, the RAC Administration module is not available for the current OnBase release. If you are using the RAC Administration module and upgrading from a version of OnBase prior to OnBase 16, you will be required to use the RAC Administration module for OnBase 15 in conjunction with an OnBase 15 Application Server. Please contact your OnBase solution provider for further information on the availability of the RAC Administration module for OnBase 17 or later.

Release of Information (ROI) Unity

The Release of Information (ROI) Unity module for OnBase 17 is not available for the initial OnBase 17 release. If you are using the ROI Unity module and upgrading to OnBase 17, you will be required to use the ROI Unity module for OnBase 16 in conjunction with the OnBase 16 Desktop until the ROI Unity module for OnBase 17 becomes available. Please contact your OnBase solution provider for further information on the availability of the ROI Unity module for OnBase 17.

Revenue Cycle Management (RCM)

If you are planning to use any of the Revenue Cycle Management (RCM) modules in OnBase 17, contact your first line of support. Due to extensive changes to the modules in OnBase 16, using these modules in OnBase 17 may require some conversions from previous versions and other data analysis.

Subscription Server

Beginning in OnBase 14, a new version of the Subscription Server module is available. The Subscription Server module has also been renamed as the Mailbox Importer module. If you are using the Subscription Server module and upgrading to the Mailbox Importer module in OnBase 17, consider the following:

- Subscription Server has been removed from the OnBase Client. The Mailbox Importer is configured within the OnBase Configuration module, and the server itself is now a Windows Service that connects to the Application Server to archive emails.
- Mailbox Importer can connect to multiple email servers and accounts. Rules and conditions previously configured within Subscription Server must be assigned to newly configured email accounts so that Mailbox Importer can receive emails.
- Mailbox Importer connects to mail servers using the IMAP, POP3, or Exchange Web Services (EWS) protocol; the MAPI protocol is no longer supported. To allow Mailbox Importer to connect and process emails, you might need to reconfigure your email environment for the appropriate protocol. Additional security measures (e.g., firewalls, HTTPS binding, etc.) can be configured as appropriate.
- Once you have configured Mailbox Importer for an OnBase 17 database, you will no longer be able to run your version of Subscription Server against this database. If you still need to access your version of Subscription Server, you must access it through the matching (i.e., pre-14) version of the OnBase Client.

Unity API

Beginning in OnBase 17, the Unity API configuration interface has been removed from the OnBase Configuration module. If you are using Unity API scripts and upgrading to OnBase 17, you will be required to use OnBase Studio to fulfill your Unity API needs.

Unity Client

A workstation can only have a single Unity Client installation with Service Mode enabled.

Viewing a Microsoft Excel document in the Unity Client takes focus away from the Microsoft Excel application. When an Excel document is open in the Unity Client, you are unable to use Excel outside of the Unity Client until the Excel document in the Unity Client is closed.

Configuration File

Ensure that you are using a current Unity Client configuration file for OnBase 17. Attempting to use a Unity Client configuration file from a previous version of OnBase may produce errors and unwanted behavior.

Citrix or Remote Desktop Environment

The Unity Client has server memory requirements that should be carefully evaluated before the Unity Client is deployed in a Citrix or Remote Desktop environment. The Unity Client can only be deployed in a Remote Desktop environment using the standard MSI installer. See the "OnBase Unity Client" section in the Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide for more information.

Printing Large Documents With Notes

As of OnBase 13, memory usage during printing has been greatly improved. However, when a document contains notes, the extra processing needed to render the notes onto a page requires a certain amount of memory that is dependent on the size, DPI, and bit depth of the source image. In some scenarios, a sufficiently large image will cause the available memory to fragment and will force you to close the Unity Client.

If the issue persists, consider printing through the OnBase Client or scanning images with lower bit depths.

Service Mode

OnBase 12 introduced the ability to automatically launch the Unity Client at machine startup by running it in Service Mode, from the Windows system tray. Service Mode causes the Unity Client to function as a listening client, and was designed to support Application Enabler and other Unity Client automation features.

Service Mode must be enabled in order to use the Application Enabler and Virtual Print Driver modules. It must also be enabled to work with Unity Pop (Upop) files and links. To enable Service Mode automatically through the ClickOnce installer, select any of the following features to include with the installation:

- Application Enabler
- Unity Client Automation API
- Unity Pop
- Virtual Print Driver

To enable Service Mode manually, set the **ServiceMode** option in the Unity Client configuration file to **true**. For more information on Service Mode, see the Unity Client documentation.

Unity Forms

Web Browser Support

Fully supported browsers for Shared Unity Forms include the following major browsers. For the best experience with these forms, one of the following browsers is recommended:

- Microsoft Internet Explorer 11
- Microsoft Edge (EdgeHTML 14 and greater)
- Google Chrome 57 and greater
- Mozilla Firefox 52 and greater
- Apple Safari 9.1/10.0/10.1 and greater

While other browsers and older versions of the above browsers can be used for submitting Shared Unity Forms, full testing is recommended as some features may not be available and functionality may be degraded.

Default Theme

As of OnBase 17, the **Modern Gray (System)** theme will be used by default for new forms in order to match the new interface of OnBase. The previous default theme is now named **Legacy (System)**. Existing Unity Forms can be updated to reflect the new default template by opening the form in the Unity Forms designer, clicking **Form Properties**, and selecting **Modern Gray (System)** from the **Theme** drop-down select list.

Universal Scope Capture

Beginning in OnBase 17, users must belong to a User Group with the **Universal Scope Capture Client** product right to access the Universal Scope Capture Client. If you are upgrading from a version of OnBase prior to OnBase 17, users will no longer be able to access the Universal Scope Capture Client until an administrator assigns them to a User Group with the **Universal Scope Capture Client** product right.

Virtual Print Driver

To use Virtual Print Driver with the Unity Client in OnBase 17, the Unity Client's Service Mode must be enabled. For more information, see [Service Mode on page 18](#).

Web Server

Updating Forms Using LoginFormProc

While LoginFormProc can still be used to create new E-Forms, it can no longer be used to update existing E-Forms. If you are using LoginFormProc to update existing forms and are upgrading to OnBase 17, you will be required to use FormPop to update existing forms.

Web Services Publishing

If you are upgrading from a version of OnBase prior to OnBase 15, and you are using web services created with fields using the **Required** option, you will be required to recreate and redeploy any of these existing web services to prevent them from failing.

Additionally, as of OnBase 17, note the following:

- If any Keyword Types are excluded from requests sent to an **Update a unity form** operation, the existing values for those Keyword Types on the Unity Form are now retained.
- If any attributes assigned to the WorkView object are excluded from requests sent to an **Update workview object** operation, the existing values for those attributes on the WorkView object are now retained.

For more information on the above options and operations, see the **Web Services Publishing** module reference guide. If recreating and redeploying your existing web services is not possible, contact technical support.

Workflow

Configuration

Beginning in OnBase 14, the Workflow configuration interface has been removed from the OnBase Configuration module. If you are using Workflow and upgrading to OnBase 17, you will be required to use OnBase Studio to fulfill your Workflow configuration needs.

Upgrading With Workflow and WorkView

If you are using both Workflow and WorkView in the same solution, and you are upgrading from a version of OnBase prior to OnBase 14, you must upgrade Workflow and WorkView concurrently to the same version and build of the software. However, if you are using Workflow and WorkView in separate, unrelated solutions, you can continue to access Workflow from older versions of OnBase.

Call Web Service using MS SOAP Toolkit Action

Beginning in OnBase 14, the **Call Web Service using MS SOAP Toolkit** action is no longer supported. If you are using Workflow and upgrading from a version of OnBase prior to OnBase 14, you will be required to use the **Call Web Service** action to fulfill your needs.

Formatted Notifications

Beginning in OnBase 16, formatted notifications can be sent if the following conditions are met:

- All components of your system (e.g., client, server, database, Distribution Service, etc.) are using OnBase 16 or later.
- A temporary cache is configured for the Distribution Service.

If you are performing an Incremental Parallel Upgrade Process and using system components prior to OnBase 16, you must use plain-text notifications until all system components have been upgraded.

Workflow Timer Service

As of OnBase 14, the Workflow Timer Service stores connection information in the database. If you are upgrading from a version of OnBase prior to OnBase 11, to retain your configuration, you must manually back up your Workflow Timer Service configuration file to a new location before upgrading.

Additionally, the Workflow Timer Service and the Workflow Timer Service Administrator user interface are being deprecated for eventual removal from the OnBase product suite. The Workflow Timer Service and the Workflow Timer Service Administrator user interface are supported in OnBase 17; however, they will not be available in OnBase 18 and subsequent versions of OnBase.

If you are currently using the Workflow Timer Service and the Workflow Timer Service Administrator user interface, Hyland Software recommends using the Unity Scheduler to fulfill your needs for Workflow timer work.

WorkView

Upgrading From Versions of OnBase Prior to OnBase 14

As of OnBase 14, the WorkView database schema is included with the main OnBase database schema. If you are upgrading from a version of OnBase prior to OnBase 14 and you need to access WorkView, you must access OnBase through an OnBase 17 client (i.e., the OnBase Web Client or the OnBase Unity Client). If you do not need to access WorkView or any interface that interacts with WorkView after upgrading, you can continue to access OnBase from older versions of your client.

As part of the upgrade process, you must run the WorkView Schema Migrator. For more information, see [WorkView on page 61](#).

Password Protection

As of OnBase 16, you can password protect an application to require a password in order to make configuration changes to an application. If you are in an environment that is using an Incremental Parallel Upgrade system configuration, however, earlier versions of OnBase Studio will not respect password protection.

System Tasks and System Events

If you are upgrading from a version of OnBase prior to OnBase 14, System Tasks that have been configured in conjunction with events at the class and filter levels will be automatically converted to System Events.

Supported Web Browsers

WorkView in the Unity Client and the WorkView Designer are supported for use with Internet Explorer 11 only.

WorkView in the Web Client is supported for use with any of the Web browsers supported in OnBase 17 (see [Web Browser Support Items for the Web Server](#) on page 22).

View Editor

The classic View Editor, which was replaced by the WorkView Designer in OnBase 6.4, has been deprecated. OnBase 17 does not support views created with the classic View Editor.

View Updater

If you are upgrading to OnBase 17 and your system contains views that were created in previous versions of OnBase, you must update these views by running the View Updater in the WorkView Doctor within OnBase Studio.

Updating your views in the WorkView Doctor will ensure that they render properly, and it will migrate to the OnBase database all views and image resources that were stored in your System Paths directories.

The files that are in System Paths directories and the paths defined in the System Paths for WorkView will remain. Once these configuration items are moved to the database, they will be retrieved from the database at runtime. In order to provide backwards compatibility, the files should be left in their directories, and the System Paths should be maintained. This allows administrators using a version previous to OnBase 17 to be able to access these configuration items. All configuration of views should be done from an OnBase Studio version 17 or greater. Should you accidentally update a view using a version of OnBase Studio previous to version 17, you can run the WorkView Doctor again, and it will detect the changes made and migrate them into the database.

For more information on running the View Updater, see the "Updating Views" section of the **WorkView | Case Manager** module reference guide.

Web Browser Support Items for the Web Server

The following subsections contain important Web browser considerations that should be reviewed before installing or upgrading to OnBase 17. When reviewing this information, please note the following:

- OnBase 17 supports both evergreen (Chrome, Edge, and Firefox) and non-evergreen (Internet Explorer, Firefox ESR, and Safari) browsers. Evergreen browsers are updated frequently and automatically, while non-evergreen browsers are updated according to a less-frequent change schedule.
- The browser versions listed in the subsections below are explicitly supported in OnBase 17, meaning that these versions have been thoroughly tested and certified. Newer versions of the evergreen browsers and security updates for the non-evergreen browsers will be compatible with OnBase, but they will not be extensively tested.

- Because the workstation must be registered before a workstation license can be assigned, and only the ActiveX Web Client registers the workstation, workstation licenses are only supported on Internet Explorer.
- Unless otherwise noted, the support information in the subsections below applies to modules that run on the OnBase Web Server. Other modules (e.g., Public Access and certain healthcare-related modules) might not be fully supported on all browsers and versions listed here. For more information on browser support for these other modules, see the appropriate module reference guides or contact your solution provider.

For further information on the Web browsers supported by OnBase 17, see [Web Client Hardware and Browser Requirements on page 44](#).

Chrome Support

In OnBase 17, the HTML Web Client is supported on Google Chrome 57 and greater.

Edge Support

In OnBase 17, the HTML Web Client is supported in limited contexts on Microsoft EdgeHTML 14 and greater. In this limited support mode, standard client functionality (e.g., Retrieval, Custom Queries, New Form, Document Import) and dialogs (e.g., Keywords, Re-index, History, Properties) are accessible.

Firefox Support

In OnBase 17, the HTML Web Client is supported on Mozilla Firefox 52 and greater, as well as on Firefox 52 Extended Support Release (ESR).

Internet Explorer Support

In OnBase 17, the HTML Web Client and the ActiveX Web Client are supported on Microsoft Internet Explorer 11 (IE 11).

Safari Support

In OnBase 17, the HTML Web Client is supported on Safari 9.1.x, 10.0.x, and 10.1.x for Mac OS X, with the exception of full screen mode.

Third-Party Software Support Items

Microsoft .NET Framework

OnBase 17 requires Microsoft .NET Framework 4.6 or later. By extension, OnBase 17 only supports the client and server operating systems that support Microsoft .NET Framework 4.6 or later, as indicated below. Carefully consider these requirements before installing or upgrading to OnBase 17.

The following client operating systems support Microsoft .NET Framework 4.6 or later:

- Windows 7 SP1
- Windows 8.1
- Windows 10

The following server operating systems support Microsoft .NET Framework 4.6 or later:

- Windows Server 2008 R2 SP1
- Windows Server 2012 R2
- Windows Server 2016

Note: While the Unity Integration Toolkit only requires Microsoft .NET Framework 3.5 on the client machine, the Application Server still requires version 4.6 or later.

Note: Individual OnBase products might require different versions of the Microsoft .NET Framework than the default versions listed above. For more information, see the appropriate module reference guide.

Note that, as of OnBase 14, Windows XP and Windows Server 2003 are no longer supported. As of OnBase 16, Windows Vista, Windows Server 2008, and Windows Server 2012 are no longer supported.

Microsoft .NET Framework can be obtained from the Microsoft Download Center at <http://www.microsoft.com/downloads>.

Incremental Parallel Upgrade Considerations

If you are performing Incremental Parallel Upgrades from OnBase 12 or earlier, it is recommended that you deploy two separate Application Servers: one Application Server running Microsoft .NET Framework 4.0 for OnBase 12 or earlier, and one Application Server running Microsoft .NET Framework 4.5.2 for OnBase 17. This will help you to avoid compatibility issues with different versions of Microsoft .NET Framework while performing the upgrade.

Microsoft Office XP Support

As of OnBase 13, the use of Microsoft Office XP is no longer supported. On June 11, 2011, Microsoft's extended support for Office XP was retired. If you are using Office XP, you should not upgrade to OnBase 17 until you have upgraded to a version of Office supported by OnBase. It is recommended that Office 2007 or later be used with OnBase 17.

Microsoft Office 2003 Support

As of OnBase 14, the use of Microsoft Office 2003 is no longer supported. On April 8, 2014, Microsoft's extended support for Office 2003 was retired. If you are using Office 2003, you should not upgrade to OnBase 17 until you have upgraded to a version of Office supported by OnBase. It is recommended that Office 2007 or later be used with OnBase 17.

Microsoft Office 2007 Support

Microsoft Office 2007 is supported in OnBase 17; however, it will not be supported in OnBase 18 and subsequent versions of OnBase. Microsoft's extended support for Office 2007 is scheduled to expire on October 10, 2017.

If you are currently using Microsoft Office 2007, Hyland Software recommends using Office 2010 or later to fulfill your needs.

Microsoft Office 2010 Support

OnBase supports the 32-bit version of Microsoft Office 2010 and Hyland Software recommends that customers only install the 32-bit version of Microsoft Office 2010. For most users, the 64-bit version of Microsoft Office 2010 does not provide additional performance benefits.

Microsoft provides the following guide to assist with choosing the correct version of Microsoft Office 2010 for your organization (<http://technet.microsoft.com/en-us/library/ee681792.aspx>).

Separate versions of the Office Business Application for 2010 and Integration for Microsoft Outlook 2010 modules are available that support the 64-bit version of Microsoft Office 2010. The 64-bit versions of these modules have limited functionality, though, due to some components which are not 64-bit compatible.

The following are limitations when using the 64-bit versions of the Office Business Application for 2010 and Integration for Microsoft Outlook 2010 modules:

- The embedded Unity Document Viewer cannot display Microsoft Office documents. The Office Business Application for 2010 will be used to open all Microsoft Office documents. The Office Business Application for 2010 is required to view Microsoft Office documents from the Integration for Microsoft Outlook 2010.
- Topaz signature pad functionality, which is part of the Signature Pad Interface module, is not available.
- Document scanning and acquisition is not available.
- The Document Composition preview window, which may be displayed after composing a new document using the Document Composition module, is not available.
- **Send To | Mail Recipient** functionality using the Novell GroupWise e-mail client is not available.

Caution: OnBase does not support mixed 32-bit and 64-bit Microsoft Office installations with the Office Business Application for 2010 and Integration for Microsoft Outlook 2010 modules.

Microsoft Office 2013 Support

OnBase supports the 32-bit version of Microsoft Office 2013 and Hyland Software recommends that customers only install the 32-bit version of Microsoft Office 2013. For most users, the 64-bit version of Microsoft Office 2013 does not provide additional performance benefits. Microsoft provides the following guide to assist with choosing the correct version of Microsoft Office 2013 for your organization ([http://technet.microsoft.com/en-us/library/ee681792\(v=office.15\).aspx](http://technet.microsoft.com/en-us/library/ee681792(v=office.15).aspx)).

Separate versions of the Office Business Application for 2013 and Integration for Microsoft Outlook 2013 modules are available that support the 64-bit version of Microsoft Office 2013. The 64-bit versions of these modules have limited functionality, though, due to some components which are not 64-bit compatible.

The following are limitations when using the 64-bit versions of the Office Business Application for 2013 and Integration for Microsoft Outlook 2013 modules:

- The embedded Unity Document Viewer cannot display Microsoft Office documents. The Office Business Application for 2013 will be used to open all Microsoft Office documents. The Office Business Application for 2013 is required to view Microsoft Office documents from the Integration for Microsoft Outlook 2013.
- Topaz signature pad functionality, which is part of the Signature Pad Interface module, is not available.
- Document scanning and acquisition is not available.
- The Document Composition preview window, which may be displayed after composing a new document using the Document Composition module, is not available.
- **Send To | Mail Recipient** functionality using the Novell GroupWise e-mail client is not available.

Caution: OnBase does not support mixed 32-bit and 64-bit Microsoft Office installations with the Office Business Application for 2013 and Integration for Microsoft Outlook 2013 modules.

Microsoft Office 2016 Support

OnBase supports the 32-bit version of Microsoft Office 2016 and Hyland Software recommends that customers only install the 32-bit version of Microsoft Office 2016. For most users, the 64-bit version of Microsoft Office 2016 does not provide additional performance benefits.

Microsoft provides the following guide to assist with choosing the correct version of Microsoft Office for your organization (<http://support.office.com/en-us/article/Choose-the-32-bit-or-64-bit-version-of-Office-2dee7807-8f95-4d0c-b5fe-6c6f49b8d261?CorrelationId=165c464e-6fb1-4532-83ad-7537787fd680&ui=en-US&rs=en-US&ad=US>).

Separate versions of the Office Business Application for 2016 and Integration for Microsoft Outlook 2016 modules are available that support the 64-bit version of Microsoft Office 2016. The 64-bit versions of these modules have limited functionality, though, due to some components which are not 64-bit compatible.

The following are limitations when using the 64-bit versions of the Office Business Application for 2016 and Integration for Microsoft Outlook 2016 modules:

- The embedded Unity Document Viewer cannot display Microsoft Office documents. The Office Business Application for 2016 will be used to open all Microsoft Office documents. The Office Business Application for 2016 is required to view Microsoft Office documents from the Integration for Microsoft Outlook 2016.
- Topaz signature pad functionality, which is part of the Signature Pad Interface module, is not available.
- Document scanning and acquisition is not available.
- The Document Composition preview window, which may be displayed after composing a new document using the Document Composition module, is not available.
- **Send To | Mail Recipient** functionality using the Novell GroupWise e-mail client is not available.

Caution: OnBase does not support mixed 32-bit and 64-bit Microsoft Office installations with the Office Business Application for 2016 and Integration for Microsoft Outlook 2016 modules.

Microsoft Office 365 Support

In order for the OnBase Office integrations to function in a Microsoft Office 365 environment, the Office 365 subscription must include a desktop-based version of Microsoft Office that is also supported by OnBase. OnBase does not have any integrations for Office Online.

Office 365 subscribers are automatically updated to the latest version of Office when it becomes available. Before this update is applied, they must ensure that they are using a version of OnBase that supports this latest version of Office. At the same time, it is recommended that Office 365 subscribers contact their solution providers to discuss any licensing updates that may be required to support their Integration for Microsoft Outlook, Office Business Application, and WorkView Integration for Microsoft Outlook solutions on the latest version of OnBase.

Microsoft Outlook 2003 Support

As of OnBase 14, the use of Microsoft Outlook 2003 is no longer supported. On April 8, 2014, Microsoft's extended support for Outlook 2003 was retired. If you are using Outlook 2003, you should not upgrade to OnBase 17 until you have upgraded to a version of Outlook supported by OnBase. It is recommended that Outlook 2007 or later be used with OnBase 17.

Microsoft Outlook 2007 Support

Microsoft Outlook 2007 is supported in OnBase 17; however, it will not be supported in OnBase 18 and subsequent versions of OnBase.

If you are currently using Microsoft Outlook 2007, Hyland Software recommends using Outlook 2010 or later to fulfill your needs.

Microsoft SharePoint Support

OnBase 17 supports the use of Microsoft SharePoint 2013, 2013 Online, 2016, and 2016 Online. If you are using an earlier version of SharePoint, you should not upgrade to OnBase 17 until you have upgraded to a version of SharePoint supported by OnBase.

Note: OnBase 17 only supports SharePoint 2013 Online and 2016 Online in the Web Parts for Microsoft SharePoint module.

Adobe Acrobat Reader Compatibility

OnBase 17 is compatible with Adobe Acrobat Reader DC and Adobe Reader XI. Beginning in OnBase 16, the use of Adobe Reader 9 and Adobe Reader X is no longer supported.

Datawatch Monarch

Report Mining Integration for Datawatch Monarch requires Datawatch Modeler version 12, or Datawatch Monarch versions 12.4 or 13. This integration cannot be used with earlier versions of the Datawatch Monarch product line.

Report Mining Integration for Datawatch Monarch is only supported with OnBase 14 and greater.

The Datawatch Modeler application must be installed on each workstation that will configure or use the Report Mining Integration for Datawatch Modeler module.

Datawatch Report Mining Server (Datawatch RMS)

Report Mining Integration for Datawatch Report Mining Server supports Datawatch Report Mining Server (Datawatch RMS) versions 4.5, 5.0, 11.5, and 12.3.

Data mining is supported for model files with *.XMOD or *.DMOD file formats.

Note: Files with the legacy *.MOD format may need to be converted in order to be used with more recent versions of Datawatch RMS. More information on the conversion and on supported file formats is available from Datawatch.

Miscellaneous Support Items

Running OnBase as a Windows Service

When configuring the OnBase Client to run as a Windows Service you must configure the service to run with the following minimum dependencies:

- DCOM Server Process Launcher
- Event Log
- Remote Procedure Call (RPC)

- Security Accounts Manager
- Windows Management Instrumentation

If you are upgrading to OnBase 17 from a previous version, you must ensure that all previously configured OnBase services are assigned these same dependencies.

Caution: If these minimum dependencies are not assigned to all OnBase services running on the workstation, when the machine running the services and starting them automatically is started, the boot process will stop at the **Applying Computer Settings** dialog box.

Note: If multiple OnBase services are configured to automatically start on the same machine, those services may need to be assigned as dependencies of the other OnBase services on that workstation in order to avoid conflicts during the workstation's boot process.

Part 3 – OnBase 17 Databases

Minimum OnBase Database Schema Version

OnBase 17 upgrades the database schema to version 3.5-409. The OnBase 17 software suite requires this minimum database schema version in order to operate properly.

Databases Supported

The following tables list the databases supported.

Microsoft SQL Server

Microsoft SQL Server	Additional Information
Microsoft SQL Server™ 2008 (RTM, SP1, SP2; SP2 recommended) Microsoft SQL Server 2008 R2 (RTM, SP1; SP1 recommended) Microsoft SQL Server 2012 Microsoft SQL Server 2014 Microsoft SQL Server 2016	<p>In April 2016, Microsoft discontinued technical support for Microsoft SQL Server 2005. As of release 17, Hyland Software no longer supports SQL Server 2005.</p> <hr/> <p>Note: You must ensure that your SQL Server database client software version matches or exceeds the database server version. For example, if your database server is SQL Server 2012, verify that the database client is SQL Server 2012 (or later). Running a previous client version, such as SQL Server 2008, will result in system instability and memory issues. For instructions on determining your server and client versions, see Database Client / Server Version Compatibility on page 30.</p> <hr/>

Oracle

Note: If you are using an Oracle database, it is strongly recommended that you have a certified Oracle Database Administrator on staff.

Oracle	Additional Information
Oracle 11g: Release 2	All Oracle 11g drivers can be used.
Oracle 12c	All Oracle 12c drivers can be used.

Sybase SQL Anywhere

Sybase SQL Anywhere	Additional Information
SAP Sybase SQL Anywhere™ 16 SAP Sybase SQL Anywhere 17	On December 31, 2016, SAP retired engineering support for Sybase SQL Anywhere™ versions 12.x and lower. As of OnBase 17, Hyland Software no longer supports SQL Anywhere versions 12.x and lower.

Database Client / Server Version Compatibility

Due to critical issues that have been reported to Hyland Software, Hyland Software strongly recommends that:

- your database client software version matches or exceeds the database server version and
- you are running the most recent version of the database client.

This will help to reduce compatibility issues and minimize troubleshooting time when issues do occur.

Your database administrator can determine the database server version and identify the most-recent version of the database client software. The ODBC driver number indicates which version of the database client software you are using. For example, if your database server software is Oracle 12 Release 1, verify that the Oracle Client software is Oracle 12 Release 1 (or later). The same is true of SQL databases. For example, if your database server is SQL Server 2012, verify that the database client is SQL Server 2012 (or later).

To check your database client version, perform the following steps from the workstation or server where the ODBC connection is configured:

1. Open your ODBC Data Source Administrator, and click on the **Drivers** tab.
2. Select the driver you are using to connect to your OnBase database.
 - If your database server software is Oracle 12 Release 1, the version number should appear as **12.1.[#.#.#]** (or later), where **12.1** is the version number and **[#.#.#]** represents the service pack.
 - If your database server software is any version of Microsoft SQL Server, select **ODBC Driver 13 for SQL Server**.

The above descriptions are examples of two commonly used database version schemes. Ensure that the supported database you use adheres to the database client/server recommendation. In general, Hyland Software recommends that you use the most current drivers that correspond to your system.

Unicode Database Support

Prior to OnBase 13, OnBase only supported ANSI databases, each of which is limited to the group of languages included on the single code page it is configured for. To ensure proper functioning of the software in a desired language, administrators would have to specify a code page that supports this language at both the Windows level and the database level. Because ANSI databases can only be set to use a single code page at a time, however, they do not provide a good way for organizations to store data across multiple languages when those languages are not supported by a single code page.

Beginning in OnBase 13, OnBase provided limited support for Unicode databases for new customers planning to upgrade to fully functional Unicode systems in OnBase 14 or later. While these customers still did not have access to Unicode functionality in OnBase 13, they had the option of initially creating a Unicode database that would readily support Unicode functionality upon upgrading to OnBase 14 or later, as opposed to initially creating an ANSI database and then converting to a Unicode database when upgrading.

As of OnBase 14, OnBase provides optional Unicode support for multiple code pages in the same database. This change will not affect the majority of OnBase users who upgrade to OnBase 17 since it pertains only to customers who request a Unicode database. By default, OnBase 17 databases will continue to be single-code page ANSI databases.

For customers moving to OnBase 17, the following scenarios are possible:

- Existing OnBase users who upgrade and intend to operate within the single-code page limitation of ANSI databases will not have to do anything to their databases in preparation for the upgrade. After the upgrade, their systems will continue to function as they always have in conjunction with the single code page specified for the database.
- Existing OnBase users who already created a Unicode database in OnBase 13 will not have to do anything to their databases in preparation for the upgrade. After the upgrade, they will have access to all currently supported Unicode functionality.

- Existing OnBase users who are still on ANSI databases and have an immediate or anticipated need for multi-code page database support will need to contact Database Support to facilitate a significant manual conversion of their existing ANSI databases to Unicode.
- Customers installing new OnBase systems with OnBase 17 who have an immediate or anticipated need for multi-code page database support may elect to create a Unicode database, which will give them access to all currently supported Unicode functionality.

After upgrading, existing OnBase users who converted from ANSI databases to Unicode databases must access OnBase from the current, Unicode-supported version of the software; they cannot continue to access OnBase from older versions of the software that only supported ANSI databases.

With only the exceptions noted below, the entirety of the OnBase product suite will support multiple code pages in the same Unicode database. Modules that are not compatible with Unicode databases will not operate if the system detects a Unicode database. These are generally modules that have had their End-of-Life status listed for one or more years already.

If you believe you will be affected by this change, please contact your support organization to make sure Hyland Software is aware of your needs. The conversion of an ANSI database to a Unicode database is not a trivial undertaking and may require planning tailored to your specific needs.

For more detailed information on Unicode support in OnBase 17, including limited support scenarios for specific modules, see the **Unicode Considerations** manual.

Support Items of Note

The following modules and features do not support Unicode database functionality in OnBase 17:

- Connector for use with SAP ArchiveLink
- Integration for IBM Notes for all Lotus Notes versions prior to 8.5.2

Note: Unicode databases other than Microsoft SQL Server 2016 do not support Mixed Case Alphanumeric Keyword Values longer than 224 characters.

64-Bit Integer Field Support

Prior to OnBase 13, OnBase was limited to storing approximately two billion documents in a single database. This limitation was the result of OnBase storing Document Handles as 32-bit integer fields in the database. 32-bit integer fields can store a maximum positive value of roughly 2.14 billion.

As of OnBase 13, newly created OnBase databases will allow for the storage of up to one quadrillion documents. Shown as a numeral, that is a 1 followed by 15 zeros. This change will not affect the majority of OnBase users who upgrade to OnBase 13 since it pertains only to newly created OnBase systems. The following three scenarios are possible:

- Existing OnBase users who upgrade and intend to operate within the current two billion documents limitation will not have to do anything to their databases in preparation for the upgrade. After the upgrade, their systems will still be limited to storing roughly 2.14 billion documents.
- Existing OnBase users who have an immediate or anticipated need to store more than two billion documents in a single database will need to go through a significant manual conversion of their existing database(s). This includes current customers using multiple databases who wish to consolidate them.
- Customers installing new OnBase systems with OnBase 13 will automatically have the higher capacity storage.

Significant development went into raising the document limit for OnBase 13, which uses a larger (64-bit) integer field to store the Document Handle. The OnBase 13 product suite now operates properly against both styles of databases. There is no performance difference based on how Document Handles are stored, nor are there any other benefits beyond the greater document capacity.

Hyland Software's go-forward strategy is to maintain compatibility with all future versions of OnBase, which will run successfully on databases with 32-bit integer fields. With over 11,000 deployed OnBase systems as of 2013, it is imperative that each of these systems continues to operate successfully with all future versions of OnBase.

With only the exceptions noted below, the entirety of the OnBase product suite will operate with the larger Document Handle fields. Modules that are not compatible with the larger Document Handle fields will not operate if the system detects Document Handles greater than 2.14 billion. These are generally modules that have had their End-of-Life status listed for one or more years already.

If you believe you will be affected by this change, please contact your support organization to make sure Hyland Software is aware of your needs. The conversion of an existing database to support larger Document Handles is not a trivial undertaking and may require planning tailored to your specific needs.

Support Items of Note

All modules in the OnBase product suite function against a 64-bit integer database. However, some modules do not fully support 64-bit integer fields; these modules continue to support integer fields up to 32 bits.

The following modules and features do not fully support 64-bit integer fields in OnBase 17:

- Application Enabler Configuration
- EDM Briefcase
- Integration for SAP ArchiveLink

- Integration for Sharp MFP

Note: While the Integration for Sharp MFP module does not fully support 64-bit integer fields, the Sharp AIP Connect options within the module do fully support 64-bit integer fields.

- Java Hyland.Types API
- R4 ACERT Ultrasound Reporting System

Part 4 – OnBase 17 Operating Systems

Supported Desktop Operating Systems

The following table lists the desktop operating systems that are supported in OnBase 17:

Operating System X = Available/Supported N/A = Not Available	OnBase Client	Web/ Application Server	Web Client	Unity Client
Windows Server 2008 R2 SP1 (or later service pack)	X	X	X	X
Windows 7 SP1 (or later service pack)	X	N/A	X	X
Windows 8.1	X	N/A	X	X
Windows Server 2012 R2	X	X	X	X
Windows 10	X	N/A	X	X
Windows Server 2016	X	X	X	X
Apple Mac OS X (Version 10.6 or later version)	N/A	N/A	X	N/A

Additional OnBase Client Operating System Requirements

OnBase Client supported operating systems require both:

- Microsoft .NET Framework 4.6 or later
- Microsoft Visual C++ 2015 Redistributable Package (x86)

The Microsoft Visual C++ 2015 Redistributable Package (x86) installs a set of Microsoft DLLs, which must be present on the workstation for the OnBase Client and Configuration modules to work. Once the redistributable DLLs are installed, they will not need to be re-installed as newer versions of the OnBase Client and Configuration modules requiring them are installed on the same workstation.

The OnBase 17 Client Installer must be run on systems that support the Windows Installer architecture. For installation to complete successfully, the installation machine also requires the Microsoft Visual C++ 2015 Redistributable Package (x86). The OnBase Client setup executable (**setup.exe**) detects these requirements and installs them, if necessary.

If you are installing the OnBase Client or Configuration modules using the Windows Installer Package file (**Hyland OnBase Client.msi**), the installation machine still requires the Microsoft Visual C++ 2015 Redistributable Package (x86). The Windows Installer Package file (**Hyland OnBase Client.msi**) will not detect missing requirements and install them.

A version of the Microsoft Visual C++ 2015 Redistributable Package (x86) is included in your OnBase Client build (**vc redistrib_x86.exe**). It can also be acquired from Microsoft at the following link: <http://www.microsoft.com/en-us/download/details.aspx?id=48145>.

Note: Individual OnBase products might require different versions of the Microsoft .NET Framework and the Microsoft Visual C++ Redistributable Package than the versions listed above for the OnBase Client. For more information, see the appropriate module reference guide.

Authenticode Signatures

Beginning in OnBase 16, most OnBase installers and executables are signed by Hyland Software using Microsoft Authenticode technology. An Authenticode signature uses digital certificates to identify the publisher of an application to ensure the application's integrity and authenticity.

To ensure the signing certificate's validity, Windows may issue a revocation check request to retrieve the most up-to-date information about the certificate. If you encounter long or delayed startup times before a user interface is presented when launching an OnBase installer or executable in a limited-connectivity network environment, these revocation checks might be timing out. For potential solutions to this issue, contact your first line of support.

Windows User Account Control Statement

Hyland Software is dedicated to ensuring that OnBase is compatible with Windows User Account Control (UAC). UAC is a feature of Windows operating systems that was introduced with Windows Vista. It limits the ability of standard users to make global system changes to a workstation and prevents malicious software from making unauthorized changes to protected areas.

For details on UAC, refer to your Microsoft support information or see [http://technet.microsoft.com/en-us/library/cc709691\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc709691(WS.10).aspx).

You may encounter UAC in OnBase when:

- Installing or uninstalling OnBase, OnBase modules, or OnBase ActiveX controls.
- Copying, moving, or saving files to the Program Files directory, Windows directory, or another protected location.
- Modifying system-wide settings, such as the registry.
- Re-indexing a document or opening a scanned batch using published IE from a Citrix or Terminal server.

If Windows UAC is enabled, the above operations may prompt for administrator privileges or credentials, even if an administrator is currently logged on.

Supported Mobile Operating Systems

The sections below list the mobile operating systems that are supported in OnBase 17, along with additional support considerations.

Android Support

Android operating system 2.2 or greater is required to use OnBase Mobile Access for Android.

Note: The user interface for Android tablets is optimized for use on Android operating system 3.0 and greater.

iOS Support

Apple releases iOS version updates on a frequent basis. Hyland Software Development and Quality Assurance departments are dedicated to developing and testing against the latest versions of iOS supported by Apple.

As of the initial release of OnBase 17, OnBase Mobile Access and Mobile Healthcare applications are supported on iOS versions 9.3.5 and 10.3.2.

After the initial OnBase release, OnBase Mobile applications will continue to be supported on up to two of the latest major versions of iOS. A major version of iOS is defined by the first digit of the iOS build number, for example, iOS 9 or iOS 10.

Testing of Major and Minor iOS Version Updates After the OnBase Release

When a new major version of iOS is officially released by Apple after the initial OnBase release, OnBase Mobile applications will be tested for compatibility with the new major version. Once testing has completed, OnBase Mobile applications will continue to be supported on the new major version of iOS and one version prior. Because of this, if a device cannot be upgraded to the iOS versions supported by OnBase Mobile applications, that device will not be supported.

When new minor versions of iOS are officially released, they will also be tested for compatibility with OnBase Mobile applications and an official communication regarding iOS version support will be released on the OnBase Community (<http://www.onbase.com/community>).

iOS Application Transport Security Requirements

In order to use OnBase Mobile applications for iOS, the Mobile Applications Broker Server must be configured to accept secure (HTTPS) connections, and the Mobile Applications Broker Server must meet the following requirements:

1. The server certificate must meet one of the following criteria:
 - Issued by a certificate authority (CA) whose root certificate is incorporated into the operating system
 - Issued by a trusted root CA and installed by the user or a system administrator
2. The negotiated TLS version must be TLS 1.2.
3. The negotiated TLS connection cipher suite must support forward secrecy (FS) and be one of the following:
 - TLS_ECDHE_ECDSA_WITH_AES_256_GCM_SHA384
 - TLS_ECDHE_ECDSA_WITH_AES_128_GCM_SHA256
 - TLS_ECDHE_ECDSA_WITH_AES_256_CBC_SHA384
 - TLS_ECDHE_ECDSA_WITH_AES_256_CBC_SHA
 - TLS_ECDHE_ECDSA_WITH_AES_128_CBC_SHA256
 - TLS_ECDHE_ECDSA_WITH_AES_128_CBC_SHA
 - TLS_ECDHE_RSA_WITH_AES_256_GCM_SHA384
 - TLS_ECDHE_RSA_WITH_AES_128_GCM_SHA256
 - TLS_ECDHE_RSA_WITH_AES_256_CBC_SHA384
 - TLS_ECDHE_RSA_WITH_AES_128_CBC_SHA256
 - TLS_ECDHE_RSA_WITH_AES_128_CBC_SHA
4. The leaf server certificate must be signed with one of the following types of keys:
 - Rivest-Shamir-Adleman (RSA) key with a length of at least 2048 bits
 - Elliptic-Curve Cryptography (ECC) key with a size of at least 256 bits
5. The leaf server certificate hashing algorithm must be SHA-2 with a digest length of at least 256 (SHA-256 or greater).

For additional information about iOS Application Transport Security, refer to the Mobile Access for iPad Product blog on the OnBase Community at <http://www.onbase.com/community> or contact your first line of support.

Windows Support

Windows 8.1 or greater is required in order to use Mobile Access for Windows.

Windows Phone Support

Windows Phone OS 8 or 8.1 is required in order to use Mobile Access for Windows Phone.

Updating OnBase Mobile Applications

OnBase mobile applications are periodically updated to include new functionality and fix software defects. When these applications are updated, the updates are not automatically deployed to devices. Users must update the OnBase Mobile application on their devices through the appropriate application store/market. These updates do not require an OnBase upgrade.

However, some functionality in OnBase Mobile applications can only be used after an OnBase upgrade. For example, a certain version of an OnBase Mobile application may be compatible with multiple versions of OnBase. When using the most recent version of the OnBase Mobile application with an older version of OnBase, some newer functionality may not be available. When using the most recent version of the OnBase Mobile application with the most recent version of OnBase, the most current features and functionality will be available.

Part 5 – OnBase 17 Client Hardware Requirements

Client Retrieval Workstation Hardware Requirements

Hardware	Minimum	Recommended
CPU	1 GHz	2 GHz or faster
Memory (RAM)	1 GB	2 GB
Free Hard Disk Space (total for installation itself and post-installation files)	2 GB	2 GB or greater
Screen Resolution	1024 x 768 (1280 x 800) Note: Using a lower resolution may result in a loss of functionality.	1280 x 1024 (1440 x 900 widescreen)

Note: The OnBase System Assessment Tool can be used to ensure that your workstation meets the minimum system requirements for the OnBase Client. For more information on this tool, see the Client Installer documentation.

OCR Processing Workstation Hardware Requirements

Hardware	Minimum	Recommended
CPU	1 GHz	2 GHz or faster
Memory (RAM)	4 GB	8 GB or greater Note: Additional RAM may be needed if working with grayscale or color images.
Free Hard Disk Space (total for installation itself and post-installation files)	2 GB	2 GB or greater

Tip: To take advantage of additional memory space when processing large images (e.g., blueprints), use the 64-bit version of the Hyland OCR Engine on the Data Capture Server.

CD/DVD/Blu-ray Authoring Workstation Hardware Requirements

Hardware	Minimum	Recommended
CPU	1 GHz	2 GHz or faster
Memory (RAM)	1 GB	2 GB or greater
Free Hard Disk Space (total for installation itself and post-installation files)	<ul style="list-style-type: none"> • CD Authoring: 3 GB • DVD Authoring: 8 GB • Blu-ray Authoring: 27 GB Note: If exporting or publishing, add an additional 1 GB to the appropriate value above for the Export directory structure	

Hardware	Minimum	Recommended
Screen Resolution	1024 x 768 (1280 x 800) Note: Using a lower resolution may result in a loss of functionality.	1280 x 1024 (1440 x 900 widescreen)

Client Scanning Workstation Hardware Requirements

Hardware	Minimum	Recommended
CPU	1 GHz	2 GHz or faster
Memory (RAM)	512 MB	2 GB or greater
Free Hard Disk Space (total for installation itself and post-installation files)	2 GB	2 GB or greater
Screen Resolution	1024 x 768 (1280 x 800) Note: Using a lower resolution may result in a loss of functionality.	1280 x 1024 (1440 x 900 widescreen)
Scanner	TWAIN compliant	

Part 6 – OnBase 17 Web/Application Server & Core Services Requirements

Server Hardware and Browser Requirements

The following requirements apply to the 32-bit Web and Application Servers only.

Server Component	Minimum	Recommended
CPU	2.4GHz dual-core / dual processor	Intel® XEON™ processor with multiple cores or processors

Server Component	Minimum	Recommended
Memory (RAM)	4 GB <hr/> Note: Using the minimum recommended memory may have an adverse effect on performance. Memory might need to be increased to accommodate other application pools or software that is running on the server. <hr/>	8 GB
Free Hard Disk Space (total for installation itself and post-installation files)	2 GB Available disk space should be at least twice the size of the largest file users may upload.	2 GB or greater Available disk space should be at least twice the size of the largest file users may upload.
Network Card	Gigabit Ethernet	Gigabit Ethernet or higher
Web Browser	Microsoft Internet Explorer 11.0 <hr/> Note: Ensure that all Windows Server updates are applied. <hr/>	
IIS	Microsoft Internet Information Server 7.5, 8.0, 8.5, or 10.0	

Web and Application Servers must be dedicated purpose servers; not used as a domain controller, DNS server, non-OnBase Web server, email server, print/database/file server, index server, proxy server, network backup server, jukebox manager, network performance monitor, OnBase Client processing workstation, or Workflow/API OnBase Client broker. Network and disk I/O hardware should be optimized for performance and redundancy. Two network ports can reduce server bottlenecks by using a segmented network for external and internal requests, where external requests are sent to the Web clients and internal requests are sent to the file and database servers. A Gigabit Ethernet connection to the file server and minimal latency connection to the database server are recommended.

Note: The OnBase System Assessment Tool can be used to ensure that your server meets the minimum system requirements for the OnBase Web/Application Server. For more information on this tool, see the **Client Installer** module reference guide.

Microsoft Internet Information Services (IIS)

Microsoft Internet Information Services versions 7 (IIS 7) and later provide the ability to install the OnBase 17 Web Server and Application Server on the same machine, but in different virtual directories running different application pools. This maximizes the resources on the server, allowing the Web Server and Application Server to each have their own application pool. When installed this way, both processes run isolated from each other and maximize the use of available memory resources on the server. The Web Server and Application Server can be installed on two separate machines to provide for additional network flexibility and scalability when necessary.

64-Bit Application Server Hardware and Browser Requirements

Server Component	Minimum	Recommended
CPU	2.4GHz dual-core / dual processor	Intel® XEON™ processor with multiple cores or processors
Memory (RAM)	6 GB Note: Using the minimum recommended memory may have an adverse effect on performance.	12 GB
Free Hard Disk Space (total for installation itself and post-installation files)	2 GB Available disk space should be at least twice the size of the largest file users may upload.	2 GB or greater Available disk space should be at least twice the size of the largest file users may upload.
Network Card	Gigabit Ethernet	Gigabit Ethernet or higher
Web Browser	Microsoft Internet Explorer 11.0 Note: Ensure that all Windows Server updates are applied.	
IIS	Microsoft Internet Information Server 7.5, 8.0, 8.5, or 10.0	

Application Servers must be dedicated purpose servers; not used as a domain controller, DNS server, non-OnBase Web server, email server, print/database/file server, index server, proxy server, network backup server, jukebox manager, network performance monitor, OnBase Client processing workstation, or Workflow/API OnBase Client broker. Network and disk I/O hardware should be optimized for performance and redundancy. Two network ports can reduce server bottlenecks by using a segmented network for external and internal requests, where external requests are sent to the Web clients and internal requests are sent to the file and database servers. A Gigabit Ethernet connection to the file server and minimal latency connection to the database server are recommended.

Full-Text Indexing Server for Autonomy IDOL Requirements

The following components of Full-Text Indexing Server for Autonomy IDOL are 64-bit applications and must be installed on a 64-bit server:

- The Autonomy IDOL Configuration utility;
- the Autonomy IDOL server;
- the Hyland Full-Text Indexing Service (IDOL);
- the OnBase OCR engine;
- the Data Capture Server.

It is a best practice to install these components on the same machine in order to avoid introducing the potential for latency and communication issues between multiple servers. If the components need to be divided between machines, the following components must be kept together on the same machine:

- The Autonomy IDOL server and Autonomy IDOL Configuration utility must be installed on the same machine.
- The OnBase OCR engine and Data Capture Server must be installed on the same machine.

Note: The Hyland Full-Text Indexing Service (indexing service) should not be installed on the same machine as the OnBase Application Server because the indexing service requires considerable system resources and may reduce the performance of machines shared with other services or functionality.

The following table lists the hardware requirements for a single machine that is hosting all of the components.

Server Component	Minimum	Recommended
CPU	2.4 GHz quad-core	3.2 GHz Intel® XEON™ hex-core

Server Component	Minimum	Recommended
Memory (RAM)	4 GB Note: Using the minimum recommended memory may have an adverse effect on performance.	12 GB
Free Hard Disk Space	5 GB	40 GB
Network Card	100 MB Ethernet	Gigabit Ethernet
Web Browser	Microsoft Internet Explorer 11.0 Note: Ensure that all Windows Server updates are applied.	

Web and Application Servers must be dedicated purpose servers; not used as a domain controller, DNS server, non-OnBase Web server, e-mail server, print/database/file server, index server, proxy server, network backup server, jukebox manager, network performance monitor, OnBase Client processing workstation, or Workflow/API OnBase Client broker. Network and disk I/O hardware should be optimized for performance and redundancy. Two network ports can reduce server bottlenecks by using a segmented network for external and internal requests, where external requests are sent to the Web clients and internal requests are sent to the file and database servers. A Gigabit Ethernet connection to the file server and minimal latency connection to the database server are recommended.

Web Client Hardware and Browser Requirements

Web Client Component	Minimum	Recommended
CPU	1 GHz	
Memory (RAM)	1 GB	2 GB or greater
Free Hard Disk Space (for installing and running the ActiveX Web Client)	200 MB	
Screen Resolution	1024 x 768 (1280 x 800) Note: Using a lower resolution may result in a loss of functionality.	1280 x 1024 (1440 x 900 widescreen)

Web Client Component	Minimum	Recommended
Web Browser	<p>Active X Web Client:</p> <ul style="list-style-type: none"> • Internet Explorer 11.0 <p>HTML Web Client (Macintosh OS):</p> <ul style="list-style-type: none"> • Chrome 57 or greater • Firefox® 52 or greater / Firefox® 52 ESR or greater • Safari 9.1.0, 10.0.0, or 10.1.0 See Safari Browser Support on page 45 for additional information. <p>HTML Web Client (Windows OS):</p> <ul style="list-style-type: none"> • Chrome 57 or greater • EdgeHTML 14 (limited support) See Edge Browser Support on page 45. • Firefox® 52 or greater / Firefox® 52 ESR or greater • Internet Explorer 11.0 	
Email Platform	MAPI 1.1 Compliant Email Client connection and supporting Active Messaging DLLs	

Edge Browser Support

In OnBase 17, the HTML Web Client is supported in limited contexts on Microsoft EdgeHTML 14 and greater. In this limited support mode, standard client functionality (e.g., Retrieval, Custom Queries, New Form, Document Import) and dialogs (e.g., Keywords, Re-index, History, Properties) are accessible.

Safari Browser Support

In OnBase 17, the HTML Web Client is supported on the versions of Safari listed in the previous table. However, note that the following limitations also apply:

- The Web Client is not supported in Safari's full screen mode.
- The Web Client is not supported in Safari Reader.

Unity Client Hardware and Browser Requirements

Component	Minimum	Recommended
CPU	1.6 GHz dual-core	2.4 GHz dual-core
Memory (RAM)	2 GB	4 GB

Component	Minimum	Recommended
Free Hard Disk Space (for installing and running the Unity Client)	500 MB	
Screen Resolution	1024 x 768 (1280 x 800) Note: Using a lower resolution may result in a loss of functionality.	1280 x 1024 (1440 x 900 widescreen)
Graphics Card	128 MB	256 MB with hardware acceleration support
Web Browser	Note: As long as you are using a supported operating system, there are no further Web browser requirements.	
Email Platform	Lotus Notes 8.5.x IBM Notes 9.0.x Microsoft Outlook 2007, 2010, 2013, or 2016 Novell GroupWise 2012 or 2014 Note: When sending messages with Novell GroupWise, Plain Text is the only format available.	
Media Player	Windows Media Player 10	

Note: The OnBase System Assessment Tool can be used to ensure that your workstation meets the minimum system requirements for the OnBase Unity Client. For more information on this tool, see the **Client Installer** module reference guide.

Unity Client Scanning Workstation Hardware Requirements

Hardware	Minimum	Recommended
CPU	1.6 GHz dual-core	2.4 GHz dual-core

Hardware	Minimum	Recommended
Memory (RAM)	4 GB	6 GB
Free Hard Disk Space (total for installation itself and post-installation files)	2 GB	2 GB or greater
Screen Resolution	1024 x 768 (1280 x 800) <hr/> Note: Using a lower resolution may result in a loss of functionality. <hr/>	1280 x 1024 (1440 x 900 widescreen)
Scanner	TWAIN compliant	

Part 7 – International Support in OnBase 17

International Support Items

Issue with Windows Regional Options

In OnBase 17 and all previous OnBase versions, changing the Windows Regional Options settings can result in the loss of currency keywords. This issue occurs if the Regional Options location field is changed to a regional setting that is not supported by OnBase. If the document is then retrieved, and keywords are viewed, the currency keyword will not be viewable and the keyword field will appear blank. If the keywords are saved with the blank currency field, the blank currency field will replace the value in the database.

Microsoft .NET Framework

Microsoft .NET Framework Language Packs contain translated text for languages other than English. If you are installing OnBase in one of the languages supported in OnBase 17, Hyland Software recommends installing the Microsoft .NET Framework Language Pack that corresponds to the version of Microsoft .NET Framework that is required for the modules in your OnBase solution. Doing so ensures that all text encountered by users in the OnBase interface (for example, right-click options in Unity Client's **Add/Modify Keywords** pane), is properly translated.

To determine which version and profile of Microsoft .NET Framework is required for the modules in your OnBase solution, consult the Installation chapter in each module's module reference guide.

Microsoft .NET Framework and Microsoft .NET Framework Language Packs can be obtained from the Microsoft Download Center at <http://www.microsoft.com/downloads>.

Please note that not all language packs may be available.

Infragistics

Within its Unity Client foundation, OnBase uses Infragistics technology for translations. Certain features, such as OnBase Studio's spell checker, only support English, German, Spanish, and French.

Note About Arabic Characters

For Arabic text, note that both letters and diacritics are counted as characters. This is important to consider when dealing with character limits in text fields.

Web Client Help Files

In OnBase 17, the Web Client can display the help files in different languages, based on the user's locale, if help files exist for that language. Help files are located in the **/AppNet/Help/** folder, in a subfolder named after the locale (i.e., **de**, **en**, **fr**, etc.). If the subfolder for the locale does not exist, the **/AppNet/Help/en** folder is used.

Note: See the Web Server documentation for more information on configuring help files for multiple languages.

Supported Languages and Cultures

A culture is considered supported when OnBase is able to properly interpret and manipulate all components of a locale (script, date, time, number, and currency format). The culture is linked to a specific location. Consequently, not all cultures of the same language are necessarily supported. Unless otherwise noted, all locales under a culture are supported.

A culture can be supported but not translated. A language is considered translated when the OnBase user interface has been translated in the language.

The following languages are supported in OnBase 17:

Language	OnBase Client	Web Client	Unity Client
Arabic ^{2,6,7}	X ¹	X ⁵	X ³
Chinese (simplified) ^{+,8}	X	X	X
Chinese (traditional) ⁸	X	X	X
Czech ²	X	X	X
Danish ²	X	X	X
Dutch	X	X	X

Language	OnBase Client	Web Client	Unity Client
Finnish	X	X	X
French ⁺	X	X	X
German ⁺	X	X	X
Hebrew ^{4,7}	X ¹		X
Indonesian	X	X	X
Italian ⁺	X	X	X
Japanese ^{+,8}	X	X	X
Korean ⁸	X	X	X
Malay	X	X	X
Norwegian ²	X	X	X
Polish ^{2,6}	X	X	X
Portuguese ⁺	X	X	X
Romanian ²	X	X	X
Russian ⁺	X	X	X
Slovenian		X	X
Spanish ⁺	X	X	X
Swedish	X	X	X
Thai ^{2,6,7}	X ¹	X	X
Turkish ^{+,7}	X	X	X

⁺ This language is translated.

¹ The OnBase Client only supports Arabic, Hebrew, and Thai for executing processes, such as the Document Import Processor (DIP).

² This language is translated in the Unity Client.

³ The Unity Client supports the default formats mandated by your Windows operating system's regional settings. Customizations to these settings are not supported.

⁴ The Hebraic calendar is not supported.

⁵ The Web Client only supports Arabic in the following contexts: Retrieval, Custom Queries, Document Import, the Document Select List, the Document Viewer, Workflow, and File Cabinets/Folders.

⁶ This language is translated in the Web Client.

⁷ This language is not supported in WorkView | Case Manager.

⁸ This language is supported via the Asian Language for OCR license.

General Support Items

The following subsections contain important considerations that should be reviewed before installing or upgrading to OnBase 17. These considerations could potentially impact several different modules in your OnBase solution.

Optical Character Recognition (OCR)

OCR processing is not supported for use with Arabic, Hebrew, or Thai.

Module-Specific Support Items

The following subsections contain important considerations that should be reviewed before installing or upgrading to OnBase 17. These considerations are presented on a module-by-module basis. Ensure that you review the sections pertaining to the modules currently in your OnBase solution.

Full-Text Indexing Server for Autonomy IDOL

This module has limited support for Japanese, Chinese, Korean, and Turkish. It is not supported for use with Hebrew or Romanian. Accented characters are not supported in the catalog name. For more information, contact your first line of support.

This module supports Arabic in text-based PDFs, Microsoft Word documents, and text documents. It does not support Arabic in text searches on image-based documents.

Report Mining

This module is not supported for use with languages that use multi-byte character sets, such as Chinese, Japanese, and Korean.

Interface Translations

Interface Translations is a feature of OnBase Configuration that allows for creating multiple translations of OnBase objects in the same database. For ANSI databases, the languages that are translated need to have compatible codepages. Unicode databases, on the other hand, support any languages that are translated.

Note: Interface Translations is only supported in Core Services applications.

The configuration objects used by the standard licensing features and Workflow can currently be translated through Interface Translations.

Limitations

The following product and functionality sections detail limitations of the Interface Translations feature. References to the Primary Configuration Language indicate the language in which the database was initially created.

Unsupported Modules and Features

The following modules and features are not supported for international use of Interface Translations:

- Unity Briefcase
- StatusView in the Web Client
- Personal Page in the Unity Client

Custom Queries

If a custom query is configured to return a document name and sort results on that document name, the sorting will be run against the Primary Configuration Language. The result may not show a sorted list in the displayed translated language.

Folders

- If the Folder Type is configured to order child folders based on folder Auto-Name, the sorting will be run against the Primary Configuration Language. The result may not show a sorted list in the displayed translated language.
- If the Folder Type is configured to order documents based on document Auto-Name, the sorting will be run against the Primary Configuration Language. The result may not show a sorted list in the displayed translated language.
- When using the folders pop-up list, searches are run against the Primary Configuration Language.

Unity Forms

Translation capabilities for Unity Forms are provided directly from the Unity Forms Designer.

Workflow

If Workflow queues are ordered by document Auto-Name, the sorting will be run against the Primary Configuration Language. The result may not show a sorted list in the displayed translated language.

Part 8 – Technical Support and Upgrade Information for OnBase 17

This section clarifies Hyland Software's commitment to supporting different versions of OnBase.

Commitment to Fix Defects for Customers Under Maintenance

When a defect is reported to Hyland Software and it is determined that a software change is required, the defect will be prioritized and reviewed for future software releases. In rare cases, if an issue is deemed significant in nature, the change may be made in the current release as well. This is done on a case-by-case basis based on information gathered during analysis of the issue. For more information on the current release status of a software change, contact your first line of support.

Hyland Software will no longer repair ANY issues in the following OnBase versions and their associated service packs:

- OnBase Core Services/Web Server versions: 4.3.1, 4.3.3, 4.3.5, 4.3.7, 4.3.9, 4.3.11, 5.0, 5.2, 6.2, 6.4, 7.2, 8.0, 8.2, 9.0, 9.2, 10.0, and 11.0
- OnBase Client versions: 3.5.1, 3.5.2, 3.5.3, 3.5.4, 3.6, 3.7 (all versions), 3.9, 5.0, 5.2, 6.2, 6.4, 7.2, 8.0, 8.2, 9.0, 9.2, 10.0, and 11.0

Hyland Software will provide technical support for all customers under maintenance.

Hyland Software will continue to provide technical support to partners and customers by troubleshooting issues with regard to the configuration, operation, and maintenance of the OnBase product line, even for older versions of the software for which error corrections are no longer being made. Based on the findings during our troubleshooting, it may be necessary to upgrade to the current OnBase version for the issue to be resolved.

Upgrading OnBase

OnBase solutions can be upgraded via a Synchronous Upgrade (i.e., all at once) or an Incremental Parallel Upgrade. Both processes are supported. However, an Incremental Parallel Upgrade Process (IPUP) is recommended by Hyland Software. In an Incremental Parallel Upgrade, the previous OnBase version remains available, in a known working configuration. If a problem occurs, users can revert to using the previous OnBase version without intervention. The goal of an Incremental Parallel OnBase Upgrade is to reduce the risk that any part of our customers' organizations will be unable to perform their work.

The "Mitigating Risk in OnBase Upgrades" document, located on the OnBase Community (https://www.onbase.com/community/technical_communities/onbase_upgrades/), explains this upgrade approach. Every Incremental Parallel Upgrade involves and requires close collaboration with your support representative. Please consult with them before and during any upgrade process.

Upgrade Schedule

Hyland Software Recommendations Regarding Product Upgrades

Due to rapidly changing technological environments, Hyland Software strongly recommends that its customers upgrade to the latest version of the software at least once every two years.

Technological changes in customer environments can lead to situations where older versions of the product may be rendered inoperable and Hyland Software may be unable to provide relief or suggestions to address issues that customers may face.

In addition, Hyland Software routinely addresses security, scalability, and other types of fixes that are important to OnBase users in its ongoing development efforts.

Recommended OnBase Upgrades

OnBase installations running version 11.0 or earlier should be upgraded to OnBase 17 immediately. Hyland Software will no longer repair any issues in these older versions or their associated service packs.

Things You Need To Do Before Upgrading

- Upgrade any necessary hardware or software on current workstations/servers.
- Upgrade the current OnBase database to a supported platform.
- Upgrade Web browsers to a version supported by OnBase 17.
- Complete a backup of the OnBase database.
- Review the "Mitigating Risk in OnBase Upgrades" document, located on the OnBase Community (https://www.onbase.com/community/technical_communities/onbase_upgrades/), which explains an Incremental Parallel Upgrade.

Things You Should Do Before Upgrading

Hyland Software strongly recommends performing these actions to improve the speed of the upgrade process and to preserve information about your OnBase solution's configuration:

- Run all reports available in the OnBase Configuration module by selecting **Report | Run All Reports**.
- Complete the distribution of all Document Distribution jobs that are listed in the Document Distribution queue. Make sure all distribution publishing jobs are completed.
- If you are using the OnBase Web Client, and you wish to preserve the settings from the **web.config** file, use the Web Application Management Console to export these settings from the **web.config** file before upgrading. Then, once the upgrade is complete, use the Web Application Management Console to import these settings into the newly created **web.config** file.

Password Configuration Considerations

If you are upgrading from a pre-9.2.0 version of OnBase, the password options from your previous OnBase version remain in effect after upgrading. However, you cannot modify the password settings from your previous OnBase version after upgrading.

Prior to OnBase 9.2.0, password options were configured at the User Group level in the **Password Options** dialog box. Additional password options that applied to all OnBase users were configured in the **Password Settings** dialog box.

In OnBase 9.2.0, the ability to configure a password policy was introduced. A password policy is a set of rules designed to enhance the security of user passwords in your OnBase solution. A password policy forces users to create and use passwords that conform to the configured rules. Instead of password policies being configured at the User Group level, a default password policy is applied globally to all User Groups in your OnBase solution. Additional password policies are then defined to support OnBase User Groups that require more restrictive password policies.

If you are upgrading from a pre-9.2.0 version of OnBase, the password options from your previous OnBase version remain in effect until you create your first password policy. You cannot modify the password settings from your previous OnBase version. When creating your first password policy, you are given the option to select whether you want to use the password settings from your previous OnBase version to configure this new password policy.

Since you are given the option to select whether you want to use the password settings from your previous OnBase version when configuring a new password policy, it is not necessary to review the password settings from your previous OnBase version before upgrading.

During the upgrade process, two pre-configured, read-only password policies are added to your system. If desired, you may select one of these as your global default password policy.

Password Policy Encryption

Due to changes in the software between versions, the algorithm used to store passwords in the OnBase database may not always be compatible with older versions of the software. This is especially important to note in the Incremental Parallel Upgrade Process (IPUP). To ensure that all users can still log in to OnBase, the password algorithm compatibility can be assigned in the **Password Policies** dialog box.

Note: Password algorithm compatibility can only be assigned if your system may need it to be changed. If this setting is not available, your system does not need to change algorithm compatibility.

The password algorithm compatibility version assigned applies to all passwords in OnBase and is not related to a single password policy. Password algorithm compatibility is not forwards compatible. It must be set to the lowest client version in your system. In other words, a newer client can log in with an older algorithm compatibility setting, but an older client cannot log in with a newer compatibility setting.

The password algorithm compatibility setting can be changed at any time and should be increased to a newer version with each upgrade, as allowed by the clients logging in. The following table describes the use for each setting:

Setting	Description
Versions prior to 12.0	Use this if any user logs in with a client that is older than version 12.
Version 12.0 and above	Use this if any user logs in with a client that is version 12 or 13, and no clients lower than version 12 are used.
Version 14.0 and above	Use this if any user logs in with a client that is version 14 or 15, and no clients lower than version 14 are used.
Version 16.0 and above	Use this if no user logs in with a client that is older than version 16.

Note: By default, new installations use the **Version 16.0 and above** setting. It only needs to be explicitly changed if clients older than version 16 are in use in your environment.

For more information on configuring password policy encryption, see the **System Administration** module reference guide.

Validating the Upgrade

Upgrading OnBase to a new version, like any software upgrade, requires thorough validation before moving the upgrade into production.

To ensure a smooth upgrade from any previous version of OnBase, you should:

- Thoroughly test current Workflow and WorkView solutions.
- Thoroughly test current API solutions.
- Thoroughly test current E-Forms, Virtual E-Forms, user forms in Workflow, HTML Custom Queries, and HTML documents.
- Thoroughly test all areas of your OnBase solution that affect critical business processes.

Upgrading From OnBase 13 or Earlier

If you are upgrading from OnBase 13 or an earlier version, when attempting to use previously generated checksums with DocPop or FolderPop URLs, the queries will no longer validate.

Legacy checksums may be required for certain OnBase environments, such as environments where multiple versions of OnBase are used (i.e., an Incremental Parallel Upgrade environment). If your solution requires previously generated checksums to still validate after an upgrade, then you must modify the following Web.config setting for the Web Server:

- In the Web Server's Web.config file, set **EnableLegacyChecksumFallback** to **true**.

If you are using a version 17 Application Server that will be generating DocPop and FolderPop URLs to be used with a version 13 or older Web Server, then you must modify the following Web.config settings for the Application Server and Web Server:

- In the Application Server's Web.config file, set **EnableLegacyChecksumCreation** to **true**.
- In the Web Server's Web.config file, set **EnableLegacyChecksumFallback** to **true**.

By default, these settings are both set to **false**, allowing only new checksums to be validated. Setting **EnableLegacyChecksumFallback** to true will allow previously generated checksums to be used.

If **EnableLegacyChecksumCreation** is set to **true**, then **EnableLegacyChecksumFallback** must also be set to **true**. When both settings are set to **false**, checksums will be created using the new method and legacy checksums will not be validated.

Note: It is recommended to keep **EnableLegacyChecksumCreation** set to **false**. If it is set to true to work with previous OnBase versions, it should be set to false once the previous versions of OnBase Web Servers have been retired.

Upgrading From OnBase 12 or Earlier

If you are performing Incremental Parallel Upgrades from OnBase 12 or earlier, it is recommended that you deploy two separate Application Servers: one Application Server running Microsoft .NET Framework 4.0 for OnBase 12 or earlier, and one Application Server running Microsoft .NET Framework 4.5.2 for OnBase 17. This will help you to avoid compatibility issues with different versions of Microsoft .NET Framework while performing the upgrade.

Upgrading From OnBase 11.0 or Earlier

If you are upgrading from OnBase 11.0 or earlier, you may notice a delay in the upgrade process. Progress may appear to stall while the folder history is being updated. This delay is because the OnBase database upgrade converts folder transaction log entries to improve consistency with how the messages are stored in the database, and to also provide compatibility with other folder transaction log entries. The length of the delay will depend on how many rows exist in the transaction log table.

Upgrading From OnBase 10.0 or Earlier

When upgrading from a pre-10.0.1 version of OnBase, System Activation is included with the database upgrade. This product security feature was introduced in OnBase 10.0.1 to protect against unauthorized duplication of a licensed OnBase system. This feature is present in all versions of the software that follow 10.0.1. System Activation is accomplished with the assistance of your first line of support and ensures that you have an authentic version of OnBase.

For complete details on System Activation, see the System Activation module reference guide.

Upgrading From OnBase 3.6 or Earlier

If you are upgrading from OnBase version 3.6 or earlier, it is recommended that you first purge Document Maintenance.

The upgrade to OnBase 17 will migrate the deleted documents that are currently in Document Maintenance to a newly created database table. The duration of this portion of the upgrade will vary depending on the number of documents currently in Document Maintenance.

A status message is displayed during the migration and is updated every 250 documents to indicate the progress of the migration.

OnBase User Security Modifications as a Result of Upgrade

Upgrading From OnBase 10.0 or Earlier

As of OnBase 11.0.0, the **Document History** and **Folder History** User Group Product Rights have been replaced by the **View History** (Documents) and **View History** (Folders) User Group Privileges, respectively. User Groups that were assigned either Product Right in the previous version of OnBase are automatically assigned the corresponding User Group Privilege after the upgrade to OnBase 17 is complete.

Module-Specific Upgrade Information

ActiveX Controls

When deploying ActiveX controls, the Web Server uses the version and service pack numbers to determine whether the client workstation's ActiveX controls need to be upgraded. For example, if you are using OnBase build 17.0.0.50 and upgrading to 17.0.0.51, you will not need to deploy a new set of ActiveX controls to client workstations. The same would be true if you had a service pack, such as 17.0.1.110, installed and upgraded to 17.0.1.111. If you are upgrading your OnBase solution from an earlier version, such as 11.0 to 17, or to a new service pack, such as 17.0.0 to 17.0.1, then you will need to deploy a new set of ActiveX controls to client workstations. The deployment can be pushed manually to client workstations or left to happen automatically when users access the Web Server.

AutoFill Keyword Sets

Beginning in OnBase 10.0.0, Reverse AutoFill Keyword Set Lookups are available for all indexing/re-indexing completed in the OnBase Client, not just from within Document Imaging. The configuration options that were formerly located on the **Reverse Keyset Lookup** tab of the **Assign Process Options for <scan queue>** dialog box can now be accessed by selecting **Keyword | Reverse AutoFill Keyword Sets** in the OnBase Configuration module.

When upgrading to OnBase 17 from OnBase 9.2.1 or lower, some Reverse AutoFill Keyword Set Lookups may be duplicated. To remove the duplicate entries, log on to the OnBase Configuration module and select **Keywords | Reverse AutoFill Keyword Sets**. Select a duplicate Reverse AutoFill Keyword Set Lookup, click **Delete**, and repeat until all duplicate entries have been removed.

Document Knowledge Transfer

Beginning in OnBase 13, a new version of the Document Knowledge Transfer module containing test creation and grading capabilities is available. The Document Knowledge Transfer module has also been renamed as the Document Knowledge Transfer & Compliance module. Existing Document Knowledge Transfer customers who are upgrading to OnBase 17 will have continued access to all existing functionality. However, existing customers who are interested in acquiring the compliance testing functionality should contact their account manager for related details.

All new customers are required to use the full-featured Document Knowledge Transfer & Compliance module that includes the compliance testing functionality.

Hyland OCR Engine

If you are upgrading to OnBase 17, you must obtain the latest version of the Hyland OCR Engine from your solution provider. The Hyland OCR Engine is used by modules that use OCR technology (e.g., Advanced Capture, Batch OCR, Full-Text Indexing Server for Autonomy IDOL, Intelligent Capture for AP, etc.), and this engine must be installed on each workstation that is to perform any OCR-related processing for these modules.

Integration for Epic

When OnBase is upgraded to version 17 from OnBase 12 or earlier, existing healthcare document correction actions (configured under **Medical | Healthcare Document Correction**) may be updated to accommodate a new configuration setting. The change affects only actions configured to display an E-Form when the action is clicked.

Beginning in OnBase 13, the **Misfile With EForm Life Cycle IDs** parameter (configured for Epic under **Utils | External Systems**) has been replaced by the **Create E-Form on Entry to Lifecycle** setting. The new setting is available in healthcare document correction configuration.

When OnBase is upgraded to 17, the upgrade process checks the **Misfile With EForm Life Cycle IDs** parameter. If the parameter specifies a life cycle associated with a document correction action, the upgrade process automatically selects the **Create E-Form on Entry to Lifecycle** setting on the document correction action. This automatic change ensures the document correction process continues to function the same way it did before the upgrade.

Note: The **Create E-Form on Entry to Lifecycle** setting only applies to actions configured to display an E-Form when the action is clicked. This setting is not required for document correction actions to send documents to Workflow.

Medical Records Unity Client

OnBase 17 introduces new options for configuring the Medical Records Unity Client.

Print Template Security

When OnBase is upgraded to version 17 from OnBase 11.0.0 or earlier, Medical Records configuration is modified to accommodate Print Template security. This change ensures users can access the same Print Templates they could access in earlier versions.

In the 11.0.0 Medical Records Unity Client, any user with the **Printing** medical records privilege could print chart documents using any Print Template, but the user could not print documents in a secure tab that the user did not have access to.

In the OnBase 17 Medical Records Unity Client, users can use only Print Templates they are assigned to. If the Print Template includes documents the users normally cannot access due to secure tab security, these documents now are included in the print job.

To accommodate this enhancement, the following changes take place during the upgrade:

- If none of the Document Types in an existing Print Template belongs to a secure chart tab, then all User Groups with the **Printing** medical records privilege are assigned to the Print Template.
- If any Document Type in an existing Print Template belongs to a secure chart tab, then no User Groups are assigned to the Print Template. Because only privileged users should be able to print secure Document Types, you must manually assign access to this Print Template. In **Print Template Configuration**, Print Templates with no User Groups assigned are denoted by an asterisk.

PDF Input Filter

If you are upgrading to OnBase 17 from version 9.2.0 or earlier, you should note that the PDFNet third-party software package is no longer fully supported for use with the PDF Input Filter module. As of OnBase 10.0.0, Hyland Software recommends using the Datalogics PDF software with the PDF Input Filter.

Existing customers using PDFNet that are upgrading to OnBase 17 can continue to use PDFNet, ensuring that they are supplied with the version of **mzPDF.dll** that corresponds to the version of PDFNet they are using. Alternatively, these customers can use the Datalogics PDF software instead of continuing to use PDFNet. New customers must use the Datalogics PDF software, which is included with the PDF Input Filter.

As in previous versions of OnBase, the PDF Input Filter module requires the **mzPDF.dll** file to be placed in the same folder as your OnBase executables. For OnBase 14, the PDF Input Filter requires **mzPDF.dll** version 5.0.0.13 or later and Datalogics version 10 or later. When upgrading to OnBase 17 or licensing the PDF Input Filter for the first time on an OnBase 17 solution, you will be asked for the version of the third-party software you are using to ensure you are supplied with the correct version of the **mzPDF.dll**. For more information, contact your solution provider.

PDFNet

If you are still using PDFNet software with OnBase 17, you must use one of the following supported C++ versions:

- 4.0.3
- 4.0.9
- 4.5.4 (recommended)

Caution: It is highly recommended that PDFNet 4.5.1 not be used. This is because of an issue with the PDFNet software where some documents that were correctly processed in previous versions of OnBase may not process correctly in OnBase 17, resulting in lost data. If you must use PDFNet 4.5.1, contact Technical Support for information on how to ensure your documents are processed correctly.

Records Management

When OnBase is upgraded to version 17 from a pre-11.0.0 OnBase release, Records Management configuration is modified to accommodate new options. During the upgrade, all users assigned the **Administer Records Management** privilege are also assigned the new **Approve Folders for Final Disposition** privilege. The ability to approve folders for final disposition was previously included with the **Administer Records Management** privilege. A second privilege was created to allow for remote approval by users in the OnBase Unity Client.

Also during the upgrade, all existing hold reasons for a Folder Type are migrated to a retention hold set, which then is assigned to the Folder Type. For example, if Folder Type A is assigned Hold Reason 1 and Hold Reason 2, and Folder Type B is assigned Hold Reason 3, then the upgrade creates two hold sets: one containing Hold Reason 1 and Hold Reason 2, and another set containing only Hold Reason 3. The first hold set is assigned to Folder Type A, and the second hold set is assigned to Folder Type B.

StatusView

On systems concurrently running multiple versions of OnBase, some OnBase versions may include StatusView portlets that are not available in earlier versions. A portlet is available only within the OnBase versions where the portlet is supported. Within the earlier versions, you can assign privileges to the portlet using the Administration pane, but the portlet will not be available for layout configuration, and the portlet will not be displayed in existing layouts where it has been added using a newer OnBase version.

Workflow

If you upgrade from a version of OnBase earlier than 5.0, Folder Types configured as Work Folders will default to the Workflow usage type. The administrator can reset this type if these folders are to be used within the file cabinet interface. This went into effect in OnBase 5.0.

WorkView

Caution: Before running the WorkView Schema Migrator, it is important to back up your database and to contact your first line of support to ensure that all prerequisites have been met. You should then upgrade to OnBase 17 immediately after running the WorkView Schema Migrator.

If you are upgrading from a version of OnBase prior to OnBase 14, you must run the WorkView Schema Migrator.

Note: The WorkView Schema Migrator must be run as an administrator.

To run the migrator:

1. Double-click on the **WorkviewSchemaMigrator.exe** file. If you do not have this file, contact Technical Support.
2. Select the **Datasource** for the database you are upgrading from the drop-down select list.
3. Enter the **Password** for the database's HSI user.
4. Click **Migrate the WorkView schema** button.
5. A message stating **Your WorkView schema has been updated properly** will display upon a successful migration. Click **OK** once the migration is complete.
6. If any errors are logged, contact Technical Support.

Note: The WorkView Schema Migrator does not support the ODBC Driver 11 for SQL Server.

If the migration does not complete in 45 minutes, the WorkView Schema Migrator must be run from the command line with the command of "WorkViewSchemaMigrator.exe -T<time>" where <time> is the total time in minutes. In the following examples, the migration will run for at least 120 minutes before timing out:

```
"C:\OnBase\WorkViewSchemaMigrator\WorkViewSchemaMigrator.exe -T120"
```

OnBase Database Versions

OnBase 17 is built upon database schema version 3.5-409. Users upgrading to OnBase 17 from an earlier version will observe that upon the first use of the OnBase Configuration module, the software attempts to upgrade the database schema to version 3.5-409.

The software will not properly function until this database upgrade is completed.

It is best to utilize OnBase 17 to upgrade the database regardless of the database schema version currently installed.

Do not attempt to upgrade to OnBase 17 through the use of intermediate versions of the OnBase software. All of the required logic to upgrade any earlier version of OnBase to OnBase 17 is included.

Compatibility with Earlier Database Versions

Hyland Software recommends that customers run an entire installation on the same version of OnBase. Doing so ensures that the OnBase solution is easier to support, troubleshoot, and maintain. Occasionally, complex upgrade scenarios require a customer to run in a mixed version environment for a period of time. While this is an acceptable short term solution, Hyland Software recommends that organizations strive to eventually complete an upgrade of their entire OnBase solution. For customers that require a mixed version environment during an upgrade, your first line of support should be contacted to provide expert guidance.

If, during an upgrade, an organization finds itself with a critical problem, Hyland Software should be contacted prior to any attempt to "roll back" an upgrade. Under no circumstances should users or OnBase solution providers "set back" or change the database version field (even if this has been done in the past).

The current version of the OnBase Configuration module should be used under all circumstances.

Note: For more information on upgrading, see the "Mitigating Risk in OnBase Upgrades" document, located on the OnBase Community (https://www.onbase.com/community/technical_communities/onbase_upgrades/).

Third-Party Software Compatibility

OnBase is used in conjunction with a variety of third-party software products. The specific versions of third-party software that are supported are documented in the requirements sections of this manual, which reflect the versions that were required at the time this manual was published.

For up-to-date information, visit the following site: https://www.onbase.com/community/technical_communities/third_party_software_updates/default.aspx.

About Virtual Environments

Hyland Software develops, tests, and supports the OnBase suite of products on specific Operating Systems, not specific hardware configurations. When OnBase is operated in a virtual environment (such as Citrix, VMware, Hyper-V, or Windows Remote Desktop) there may be limitations or subtle differences imposed by the environment. The customer and the virtual environment vendor are responsible for any interactions or issues that arise at the Hardware or Operating System layer as a result of their use of a virtual environment.

When it appears that a performance-related issue in OnBase is either caused by (or is unique to) the virtual environment, organizations may be asked to validate that the issue occurs in a non-virtual environment. Hyland Software will make this request if there is reason to believe that the virtual environment is a contributing factor to the issue.

Each OnBase site is unique. Hyland Software depends on the customers who deploy OnBase in virtual environments to do so only after careful design and adequate planning (that takes into account the workloads of your organization), and in accordance with recommendations provided by the virtual environment's vendor. As with any implementation, Hyland Software strongly recommends that any customer deploying the OnBase solution in a virtual environment thoroughly test the solution before putting it into production.

For information about using OnBase in a Citrix and Microsoft Windows Remote Desktop environment, please see the **Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide**, available on the OnBase Community (<https://www.onbase.com/community>).

64-Bit Support Statement

The OnBase suite of products is tested on 64-bit systems and is capable of being deployed on 64-bit systems using the Windows 32-bit on Windows 64-bit Emulator (WOW64) layer. However, OnBase modules that integrate with third-party applications may not be able to be used with the 64-bit versions of these applications. For these modules, only the 32-bit versions of these third-party applications are currently supported by the OnBase integrations. Consult the module-specific requirements section in each module reference guide for complete requirements details.

Supported database versions that are deployed on a 64-bit database server are also supported. For more information, contact your solution provider.

INI File

INI files (initialization files) are plain-text files that contain configuration information. These files are used by Windows and Windows-based applications to save and access information about your preferences and operating environment. OnBase uses an initialization file named `onbase32.ini`. If a user does not have rights to access the `onbase32.ini` file, that user will be unable to use the Client or Configuration modules.

The `onbase32.ini` file is primarily used to store settings specified in the Client or Configuration module. For example, when a user selects a default data source in the OnBase Client's Workstation Options dialog box, this selection is saved to the `onbase32.ini` file. The `onbase32.ini` file is also used to make modifications to OnBase modules that cannot be made through the module's interface.

Previous File Location/File Name

Every version of the OnBase Client prior to 8.2.0 used an INI file named OnBase.ini. In OnBase 8.2.0 and subsequent versions, the INI file was moved to a new location to be consistent with changes Microsoft has made to Windows. Since the location has changed, the name of the file has also been changed to alleviate some confusion between the needs of OnBase 8.2.0 and installations of older executables. The new file name is onbase32.ini.

Location

For all currently supported operating systems (i.e., Windows 7 SP1 or later), the default location of the onbase32.ini file is **C:\ProgramData\Hyland Software**. For previous versions of OnBase running on older operating systems, the default location of the onbase32.ini file may have been different (e.g., **C:\Documents and Settings\All Users\Application Data\Hyland Software**).

Note: To maintain backwards compatibility with previous versions of OnBase, OnBase will check the workstation's **C:\Windows** folder for the OnBase INI file if it is not found in the folder specified above. If the OnBase INI file is found in the **C:\Windows** folder, OnBase will copy the file to the new location. The previously existing version of the OnBase INI file will remain in the **C:\Windows** folder, but will no longer be used by OnBase.

Your onbase32.ini file may reside in a different location, if that location is specified by the following command line switch on the OnBase Client shortcut target:

-INIFILE= "full path\filename", where **full path** and **filename** are replaced by the specific path and file name.

If this command line switch is not used and you move or rename your onbase32.ini file, OnBase will recreate the file in the default folder and ignore the newly created file.

INI Considerations in a Citrix and Microsoft Windows Remote Desktop Environment

In Remote Desktop environments, a remote session is established in which the user is running applications that are not installed locally. This presents a challenge when an application, such as OnBase, requires a user-specific INI file to establish unique settings. In a Remote Desktop environment, you must ensure that each user has a single, unique INI file to make sure any user-specific settings are consistent for that user.

Note: The default location of the OnBase INI file is not unique in a Remote Desktop environment.

To ensure that the INI file is accessible by OnBase and unique to each user in a Remote Desktop environment, the **-INIFILE** command line switch must be applied to the OnBase Client and Configuration shortcuts and be set to a unique location for the INI file.

Note: Additional details regarding the deployment of OnBase in a remote desktop environment is discussed in detail in the **Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide**, available from your first line of support.

Editing the INI File

Users with the **Configuration** Product Right can open the onbase32.ini file from the OnBase Client by selecting **Admin | Utilities | Edit INI File**. When multiple onbase32.ini files exist, opening the onbase32.ini file from the OnBase Client ensures that a user is editing the correct onbase32.ini file instance. In most cases, this will be the onbase32.ini file residing in the default directory described above. If an alternate location for the onbase32.ini file is specified by the **-INIFILE** command line switch, the file in the specified location will be opened.

Part 9 – API Support for OnBase 17

Some OnBase customers choose to develop their own client applications to access their OnBase database or expand the functionality of certain OnBase modules (e.g., Workflow and WorkView) using the OnBase Application Programming Interface (API). The OnBase API is a developer's tool that requires a high level of technical sophistication to use properly. Hyland Software offers training in the use of the API, and it is strongly recommended that any customer who wants to use the API attend the training.

Through our API Support Group at apisupport@onbase.com, Hyland Software offers API product support to customers who are API certified.

This support is provided to assist customers who believe they have identified a product defect while using the API in development or production. A "defect" is defined as behavior or performance of the API that is contrary to the behavior described in the product documentation. The OnBase SDK documentation is the comprehensive documentation of the OnBase APIs, and this is also provided to assist customers.

Customers who believe that they have discovered a defect in the API should contact API Support for assistance. Hyland Software may require that the customer provide sample code or a use case in order to facilitate the reproduction and investigation of the issue by Technical Support and Development.

It is important to note that support for the API is limited to the resolution of API-related defects. API Support should not be contacted for assistance with non-API-related defects, programming, software design, business system analysis, a Microsoft operating system, or issues with development tools. Instead, the appropriate outlet should be contacted for assistance with these items (e.g., your first line of support for non-API-related defects, your account manager for programming and software design issues, etc.).