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Delta Report

Prepared for Giga Colombia SAS

6 Upgrade Considerations included

Upgrading from OnBase 20.8 to OnBase 21.1

67 Release Notes included

20.8.1.1000 – 21.1.5.1000

OnBase by Hyland

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Upgrade Considerations

from 20.8 to 21.1

General Considerations

Overview

The following upgrade considerations have been compiled by OnBase subject matter experts. These upgrade considerations are general and applicable to most OnBase solutions and network environments and should be considered each time an upgrade is performed.

Carefully consider the impact of making any changes, including those listed below, prior to implementing them in a production environment.

For additional general information about upgrading OnBase, refer to the Upgrade Guidelines reference manual, and visit the Hyland Community at: https://www.hyland.com/community.

The following areas of OnBase are covered in these upgrade considerations:

Systemwide Upgrade Considerations

- General User Interface Redesign
- Environment Considerations
- The System Assessment Tool
- Platter Management
- Standard Authentication
- System Security
- Licensing
- Licensing Certificates
- Technical Requirements Overview for New Installations and Upgrades
- Installation Requirements
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- Remote Desktop Environment Deployment Considerations
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Feature Specific Upgrade Considerations

- Application Server
- AutoFill Keyword Sets
- Command Line Switches
- Data Capture Server
- Dictionary Import Processor
- Document Import Processor
- External Mail Services
- Folders
- Folders Best Practices
- INI Settings
- Mobile Applications Broker Server
- Studio
- System Activation
- Unity Scheduler

General User Interface Redesign

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As of OnBase 17, the Unity Client and Web Client have a new user interface design. The design changes do not affect functionality, but end users may find the new interface unfamiliar. If you are upgrading from a version of OnBase prior to OnBase 17, review the changes to the user interface with end users, and ensure that any custom end-user documentation is updated accordingly.

Environment Considerations

The following general information should be considered or noted when upgrading OnBase deployments. Read this information prior to upgrading your version of OnBase.

- Make note of the OnBase software installed on the machine.
- Check to see if any applications are no longer supported, and plan for a replacement.
- Check the installation prerequisites for the OnBase version to which you are upgrading.

  Note the available hard drive space as well as RAM and processor speed on all machines to ensure the minimum requirements are met. See individual module reference guides for requirements information.

- Check to ensure that any scripts will be compatible with the new version of OnBase.
- Check the **Version Compatibility** setting under **Utils | Cryptography** to ensure that the minimum version configured allows for the versions of all clients that will be accessing the upgraded system, or include upgrading incompatible clients in your upgrade plan.
- Ensure that the proper compatible third party applications are installed (e.g., Adobe Acrobat, Microsoft Office).
- If resources are available, consider performing a test upgrade in a test environment before upgrading the production environment.
- Ensure any proxy servers and load balancer configurations reflect the proper Application Server or Web Server URLs.

  The OnBase Application Server and Web Server should be included in the proxy server's whitelist in order to limit performance impact. See the Application Server and Web Server module reference guides for load balancing configuration information.

- Ensure that basic network connectivity tests have been completed between client and server machines.
- Delete the browsing history and Temporary Internet Files cache on all end-user machines.
- If the OnBase ActiveX controls are used, new controls need to be installed between major versions. All OCX and DLL files must match the version and build of OnBase being installed.
- For existing installations, run the installer as a Windows administrator.
- For a new installation, run startup.exe as a Windows administrator to ensure necessary prerequisites are installed.
- In a Remote Desktop environment, ensure that the user mode is set to **install** during installation and configuration, and then set to **execute** when finished.
- When upgrading to OnBase 16 SP1 or later, a one-time Keyword Group Maintenance process is required. You are prompted to run this process when opening the **Keyword Type Group Configuration** dialog box in the Configuration module. This dialog box cannot be accessed until the maintenance process has been completed.

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- Use of VBScript is not supported for HTML documents, E-Forms, or any document formats that rely on Internet Explorer for rendering. This is because VBScript is deprecated in Internet Explorer. Any functionality that depends on VBScripts should be updated to use JavaScript. For more information, see Microsoft's documentation on Disabling VBScript execution in Internet Explorer.

The System Assessment Tool

The System Assessment Tool helps to ensure that workstations meet the minimum system requirements for the OnBase Client, Unity Client, and Web and Application Servers. It is an optional tool that can be used when deploying or upgrading workstations to the current version of OnBase.

Using the System Assessment Tool

To run the System Assessment Tool:

1. Navigate to the **SAT** folder of your OnBase Client or OnBase Core Services build.
2. Double-click **System Assessment Tool.exe**.
3. The System Assessment Results page is opened in a web browser.
4. Results are returned in two sections:
    - **Client Report** - This section checks the workstation's components against the OnBase Client and Unity Client minimum requirements. It contains the following results:

Component	Description
Operating System	The operating system installed on the workstation.
CPU	The speed of the workstation's CPU.
RAM	The amount of RAM on the workstation.
Free Hard Disk Space	The amount of free hard disk space on the workstation.
Video Memory	The amount of video memory on the workstation.
.NET Framework	Whether or not the required Microsoft .NET Framework is installed on the workstation.
Internet Browser	The Internet browser installed on the workstation.
Visual C++ Redistributable	Whether or not the required Microsoft Visual C++ Redistributable Package is installed on the workstation.

- **Server Report** - This section checks the workstation's components against the OnBase Web/Application Server minimum requirements. It contains the following results:

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Component	Description
Operating System	The operating system installed on the workstation.
CPU	The speed of the workstation's CPU.
RAM	The amount of RAM on the workstation.
Free Hard Disk Space	The amount of free hard disk space on the workstation.
.NET Framework	Whether or not the required Microsoft .NET Framework is installed on the workstation.
Internet Browser	The Internet browser installed on the workstation.
Visual C++ Redistributable	Whether or not the required Microsoft Visual C++ Redistributable Package is installed on the workstation.

1. One of the following statuses is displayed next to each component:

Status	Description
PASS	This component meets or exceeds the minimum requirement.
FAIL	This component does not meet the minimum requirement.

Note: The description for each **PASS** component indicates whether the component meets the minimum requirement or the recommended requirement.

Platter Management

The following information should be considered or noted when upgrading Platter Management deployments. Read this information prior to upgrading your version of OnBase.

General Deployment Considerations

In addition to the previous considerations, the following should be considered with regard to general deployments:

- When upgrading Platter Management systems using incremental, parallel upgrades, be aware that many Platter Management-related components require specific software versions and builds to match and can become unusable if there is a mismatch.

KOMpliance Considerations

KOMpliance servers are no longer supported for use with OnBase as of Foundation EP1.

Standard Authentication

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The following information is specific to Standard Authentication.

Non-Interactive Active Directory Authentication

Additional configuration is required to maintain the authentication credentials of web applications in OnBase when the following conditions are met:

- OnBase is configured to use **Active Directory - Enhanced** as the authentication method
- OnBase is configured to use non-interactive/autologons

For complete details, see the **Required Configuration Settings for Non-Interactive Active Directory Authentication** section in the **Legacy Authentication Methods** documentation.

Foundation EP1

The **Active Directory - Basic** authentication method was removed after OnBase 18. Client logins attempting to use this method will fail in OnBase versions after 18. To continue using Active Directory to authenticate users, you must change the configuration to **Active Directory - Enhanced**. The **Auto-Configure Using Matching Group Names** option is intended to assist in the migration from an existing Active Directory - Basic authentication method to the Active Directory - Enhanced method.

System Security

Upgrading your OnBase system can help protect you from known or discovered vulnerabilities in the software. Hyland Software routinely addresses security, scalability, and other types of issues that are important to OnBase users in its ongoing development efforts. Hyland Software strongly recommends that its customers upgrade to the latest version of OnBase at least once every year.

See the **Security Best Practices** module reference guide for complete details on security considerations for OnBase installations.

Licensing

When upgrading to OnBase 17 or later, all existing license assignments in the previous version are carried over to the upgraded version. However, in mixed environments in which multiple versions of OnBase exist (such as an incremental parallel upgrade process), any manual changes made to a named-user license in a pre-17 version of OnBase Configuration will not be recognized in version 17 or later OnBase applications.

It is highly recommended to use the latest version of OnBase Configuration (17 or later) to make any manual changes to named-user license assignments. Additionally, if User Group-associated licensing is being used, a user must log into the latest version of OnBase (17 or later) to have the license dynamically assigned to that user.

Licensing Certificates

If a licensing certificate contains any products that require a database upgrade, the **Product Schema Version Alert** dialog box is displayed. You must choose to enable the upgraded modules, which will force a database upgrade, or disable those modules until a database upgrade can be performed.

If a licensing certificate contains licenses for products not available in the current version of the software, you are warned to upgrade your software to a newer version before installing the certificate. The licensing certificate can still be installed without upgrading, but there is no functionality tied to licenses not available in the current version of the software.

It is recommended that you install a licensing certificate using the version of the software that contains all the products for which you will be licensed.

Technical Requirements Overview for New Installations and Upgrades

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Before installing or upgrading to OnBase Foundation EP5, it is important to consider technical requirements that must be met and technical choices that must be made for various types of installations.

See the **Technical Requirements Overview for New Installations and Upgrades** reference guide for a detailed overview of technical considerations for installing OnBase Foundation EP5.

Installation Requirements

Before installing or upgrading to OnBase Foundation EP5, it is important to consider the database, operating system, Web browser, hardware, and other requirements that must be met for various types of installations.

See the **Installation Requirements** reference guide for a detailed overview of the general and module-specific requirements for installing OnBase Foundation EP5.

Diagnostics Service and Diagnostics Console

The following information should be noted when upgrading the Diagnostics Service and Diagnostics Console.

General Considerations

To ensure compatibility, upgrade to the same version of both the Diagnostics Service and Diagnostics Console. The Diagnostics Service and Diagnostics Console change from version to version, so the same version of each should be used to take full advantage of all features.

Remote Access

When the Diagnostics Service is installed or upgraded it is only enabled for local machine access by default. Remote access must be specifically configured after upgrading or for new installations.

Caution: The data collected by the Diagnostics Service may contain sensitive system information. Enabling remote access can pose a security risk if your environment is not adequately configured to prevent unauthorized users from gaining access to the data received from remote Diagnostics Services.

Microsoft .NET Core

Due to the discontinuation of Microsoft .NET Core version 2.2.0, issues may occur during an upgrade from a version of OnBase prior to Foundation EP2 to OnBase Foundation EP2 or later. After upgrading, you must run the Repair operation either using the installer or through the Add/Remove Programs function in Windows.

Remote Desktop Environment Deployment Considerations

There should be no noticeable difference to users when OnBase and its modules are accessed in a Remote Desktop environment. However, there are certain installation and configuration requirements unique to a Remote Desktop environment that must be fulfilled to ensure a fully functioning system.

See the **Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide** for complete details on installing and configuring OnBase in a remote desktop environment.

Hardware Resource Guide

Every OnBase solution has unique characteristics that may impact hardware requirements. Considerations such as solution size, infrastructure design, security, and user access to documents are examples of solution characteristics that can impact hardware needs.

See the **Hardware Resource Guide** for hardware recommendations and hardware sizing guidelines for OnBase solutions.

Unicode Considerations

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General and module-specific information must be carefully considered before installing a new Unicode system for OnBase or converting an existing ANSI system to Unicode when upgrading.

See the **Unicode Considerations** reference guide for complete details on considerations for OnBase Unicode systems.

International Considerations

The following information should be considered or noted when upgrading International deployments. Read this information prior to upgrading your version of OnBase.

Obtaining OnBase Client Language DLLs

The language ***RC.dll** files used by the OnBase Client and Configuration modules must be obtained from Technical Support for any upgrade. These files are version-specific.

Upgrading from OnBase 14 Utilizing Asian OCR Languages

When upgrading from OnBase 14 to a newer version of OnBase and Asian OCR languages are used, the **Asian Language OCR** license is required. Existing OCR formats from OnBase 14 will not be lost, however, no new Asian OCR formats can be created without the license.

Application Server

The following information should be considered or noted when upgrading Application Server deployments. Read this information prior to upgrading your version of OnBase.

Microsoft .NET Core

Due to the discontinuation of Microsoft .NET Core version 2.2.0, issues may occur during an upgrade from a version of OnBase prior to Foundation EP2 to OnBase Foundation EP2 or later. After upgrading, you must run the Repair operation either using the installer or through the Add/Remove Programs function in Windows.

ADO.NET Connection Strings and ODBC Connections

As of OnBase 18, the default database connection method for the Application Server and other Core-based applications is ADO.NET connection strings. The Application Server no longer supports ODBC connections to connect to the OnBase database. If you are upgrading from version 17 or earlier, you must update data source connections in the Application Server to use connection strings. In addition, any applications that connect to the database using the Application Server must also be updated to reference the name of the Application Server's data source connection string instead of an ODBC data source name.

Proxy Server

As of OnBase 18, the Application Server Proxy has been deprecated. A reverse proxy configuration is recommended instead. If you are upgrading from a solution that depended on the Application Server Proxy, you should update the solution to use a reverse proxy. See the Application Server documentation on Reverse Proxy Configuration for more information.

IIS Settings

If the Application Server being upgraded was manually installed in version 16 or earlier, ensure that the following settings are configured in IIS:

- Configure the application pool for the Application Server with **Start Mode** set to **AlwaysRunning**.
- Configure the Web site for the Application Server with **Preload Enabled** set to **True**.

Global Assembly Cache (GAC) Registration

When upgrading the Application Server, it is considered a best practice to de-register any Application Server DLLs from the Global Assembly Cache (GAC) before installing the new version. If any GAC registration had been performed manually in the previous version of the solution, that

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registration will need to be performed manually in the upgraded version as well. This ensures that the GAC references the upgraded versions of the Application Server components.

Unity Scheduler Requirement

Beginning in OnBase 18, the Unity Scheduler Service is required for all OnBase deployments. An instance of the Unity Scheduler Service must be installed and running to ensure that necessary maintenance tasks are automatically performed on the OnBase system. When upgrading any OnBase component to version 18 or later, any existing instance of the Unity Scheduler from a previous version must also be upgraded to version 18 or later. For more information on the Unity Scheduler Service, see the **Unity Scheduler** module reference guide.

Checksum Key Requirement Upgrade Considerations

This version of OnBase has additional Upgrade Considerations when upgrading to it from one of the following earlier versions:

- Any pre-Foundation releases prior to 18 SP 2
- Foundation EP1
- Foundation EP2
- Foundation EP3, prior to Patch 23
- Foundation EP4

If your solution depends on using checksums for validating Pop integration URLs, you are now required to configure a unique checksum key value, which is used to create the checksum value added to the URL.

If your solution did not previously use a unique string value to create checksum values, you must take the following actions in order for any previously created Pop integration URLs to validate:

- In the Web Server web.config file:

  Enter a unique checksum key value in the **checksum** setting for the Pop integration being used (for example, the **checksum** setting within the **Hyland.Web.DocPop** element).

  - Set the **EnableLegacyChecksumFallback** setting to **true**.

Note: Setting the **EnableLegacyChecksumFallback** setting to **true** should be considered a temporary method of validating legacy checksums until you can recreate and replace the Pop integration URLs using the unique string value as the checksum key.

In addition to these actions, if your solution also uses an Application Server that generates Pop integration URLs outside of the Web Server, you must also take the following action to ensure successful checksum generation and validation:

- In the Application Server web.config file, enter the same unique checksum key value in the **ChecksumKey** setting within the **Hyland.Web.AppServerPop** element. The values in the Application Server **ChecksumKey** setting and Web Server **checksum** setting must match exactly.

If your solution was already using a unique string value to create checksum values, any Pop integration URLs that were previously created will continue to validate with no additional action needed.

Upgrading from Version 13 and Earlier

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

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how these legacy checksums were originally generated, you may be required to regenerate the Pop integration URLs:

- If a unique string value was not previously configured to create the legacy checksums, you must regenerate the Pop integration URLs. A unique checksum key value is required for checksum creation and validation, and a URL created without a checksum key will not validate.
- If a unique string value was previously configured to create the legacy checksums, you can still validate the URLs by taking the following actions.

Legacy checksums may be required for certain OnBase environments, such as environments where multiple versions of OnBase are used (for example, an Incremental Parallel Upgrade environment). If your solution requires checksums generated in OnBase 13 or earlier to still validate after an upgrade, then you must modify the following web.config setting for the Web Server:

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

If you are using a version 14 or later Application Server that will be generating Pop integration URLs to be used with a version 13 or earlier Web Server, then you must modify all of the following web.config settings for the Application Server and Web Server:

- In the Application Server web.config file, set **EnableLegacyChecksumCreation** to **true**, and enter a checksum key value for the **ChecksumKey** setting.
- In the Web Server web.config file, set **EnableLegacyChecksumFallback** to **true**, and enter the same checksum key value for the **checksum** setting. The values in the Application Server **ChecksumKey** setting and Web Server **checksum** setting must match exactly.

By default, the legacy checksum settings are 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 earlier OnBase versions, it should be set back to **false** once the earlier versions of OnBase Web Servers have been retired.

AutoFill Keyword Sets

There are no additional upgrade considerations for this module.

Command Line Switches

There are no additional upgrade considerations for this module.

Data Capture Server

As of OnBase 18, the default database connection method for the Data Capture Server is ADO.NET connection strings. The Data Capture Server no longer supports ODBC connections to connect to the OnBase database. If you are upgrading from version 17 or earlier, you must update data source connections in the Data Capture Server to use connection strings. In addition, any applications that

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connect to the database using the Data Capture Server must also be updated to reference the name of the Data Capture Server's data source connection string instead of an ODBC data source name.

Dictionary Import Processor

Upgrade considerations for this module are currently are being researched and will be available when complete. Check back for updates or contact your first line of support for more information.

Document Import Processor

Upgrade considerations for this module are currently are being researched and will be available when complete. Check back for updates or contact your first line of support for more information.

External Mail Services

There are no additional upgrade considerations for this module.

Folders

The following information regarding Folders should be considered or noted prior to upgrading your version of OnBase.

Import/Export Considerations

The following should be considered with regard to importing and exporting:

- When importing and exporting in OnBase Configuration or Studio, ensure that all Folder settings are successfully applied (for example, auto-foldering settings, Parent Folder Type Keyword Type settings, and File Cabinets are not carried over).

Folders Best Practices

There are no additional upgrade considerations for this module.

INI Settings

There are no additional upgrade considerations for this module.

Mobile Applications Broker Server

The following information should be considered or noted when upgrading Mobile Applications Broker Server deployments. Read this information prior to upgrading your version of OnBase.

Installing the Mobile Applications Broker Server

As of OnBase 18, when using the graphical installer to install the Mobile Applications Broker Server, it is installed as a 64-bit application by default. In versions prior to OnBase 18, the Mobile Applications Broker Server could only run as a 32-bit application.

If you are manually installing or upgrading the Mobile Applications Broker Server from a version prior to OnBase 18 and want it to run as a 64-bit application, the application pool for the Mobile Applications Broker Server must have the Enable 32-Bit Applications option set to false.

Studio

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The following information should be considered or noted when upgrading Studio deployments. Read this information prior to upgrading your version of OnBase.

Import/Export Considerations

The following should be considered with regard to importing and exporting in Studio:

- When using the Import/Export tool, for best results, ensure that the version and build from which you are exporting matches the version and build to which you are importing (i.e. 15.0.1.94 used to export, 15.0.1.94 used to import).
- If restoring a backed-up database, or using an export file to rapidly set up a new environment, it is important to ensure that all the required Disk Groups and the System Documents are already configured. When using Studio to import a configuration file, a system verification report is generated after importing. If the System Documents are not configured properly, an error will be displayed and the process will have to be executed again after the Disk Groups and System Documents have been configured.

Post-Upgrade Considerations

The following should be considered with regard to post-upgrade maintenance in Studio:

- It is highly likely that after upgrading you will find new System Document Types available within OnBase. Navigate to **Document | Document Types** in the Configuration module in order to assign these new Document Types to the appropriate System Disk Group and System Document Type Group.

System Activation

There are no additional upgrade considerations for this module.

Unity Scheduler

The following information should be considered or noted when upgrading Unity Scheduler deployments. Read this information prior to upgrading your version of OnBase.

General Deployment Considerations

The following should be considered with regard to general deployments:

- As of OnBase 18, the Unity Scheduler Service is required for all OnBase deployments. When upgrading any OnBase component to version 18 or later and an instance of the Unity Scheduler Service from a previous version exists, configuration changes to the service must be made using a version of OnBase Studio prior to version 18.
- Before upgrading to version 18 or later of the Unity Scheduler Service, the database must first be upgraded to OnBase 18 or later.
- When upgrading to this version of Unity Scheduler, you must ensure that all instances of the Unity Scheduler Service are also upgraded to the same version.

XML Style Sheet Configuration

To ensure the highest level of security, more restrictive XSLT parsing has been put into place and it will generate an exception whenever a <xsl:include/> tag is present in a style sheet file. Here is an example of this tag, where FileName.xsl is the external .xsl file being referenced:

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<xsl:include href=”FileName.xsl”/>

This tag informs the XSLT parser to also parse in any XSL content from the specified external file. In order to avoid generating an exception, all content from any referenced.xsl file needs to be copied into the main style sheet .xsl file used for viewing and the <xsl:include> tag needs to be removed. Care must be taken to transfer any <xsl:includes> references embedded within other referenced .xsl files to the main file as well.

It is recommended to not use <xsl:include> in .xsl files for improved security. While it is not recommended to reference external .xsl files, if your solution requires it, you can override this security feature by using the **AllowInsecureExternalXsl** key and set it to **true**. This key must be placed in the Application Server's web.config configuration file under the **appSettings** node.

<add key="AllowInsecureExternalXsl" value="true" />

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Integration for Microsoft Outlook 2019

There are no additional upgrade considerations for this module.

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Office Business Application for 2019

The following information should be considered or noted when upgrading the Integration for Microsoft Office deployments. Read this information prior to upgrading your version of OnBase.

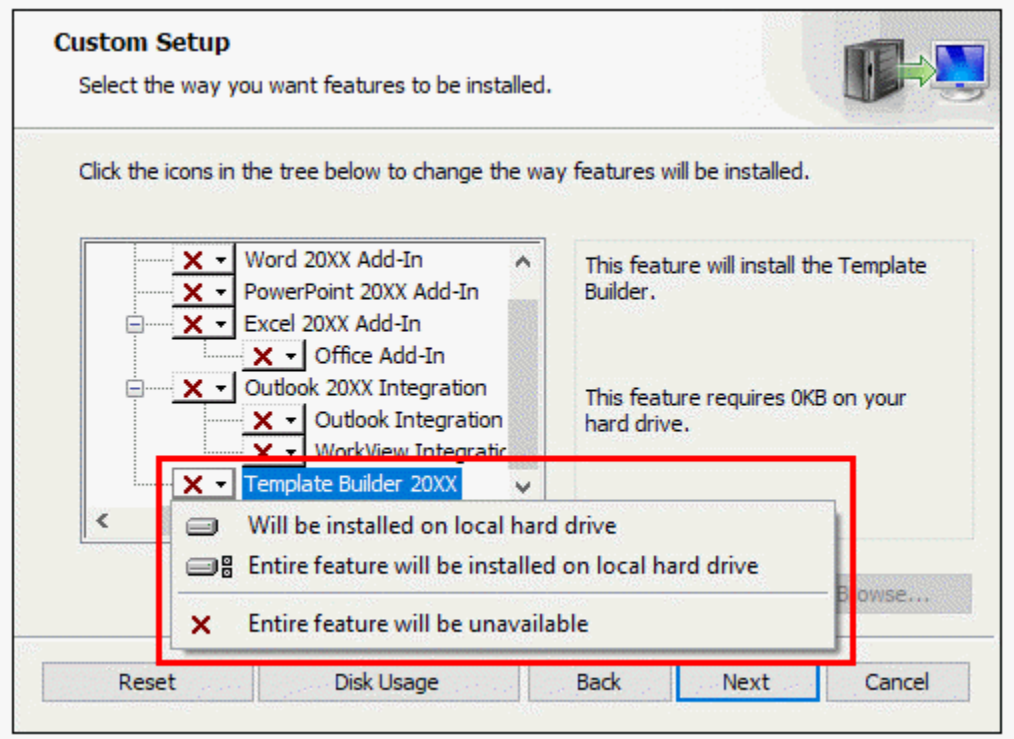
Microsoft Office 2016 No Longer Supported

As of Foundation EP5, Microsoft Office 2016 is not supported in OnBase.

Upgrading with the Template Builder Feature

If your current installation includes the Template Builder feature, you must select the Template Builder feature again when upgrading to the latest version of OnBase.

- From the MSI Installer: From the **Custom Setup** dialog box, click the drop-down list beside the name of the Template Builder component to display the installation options.



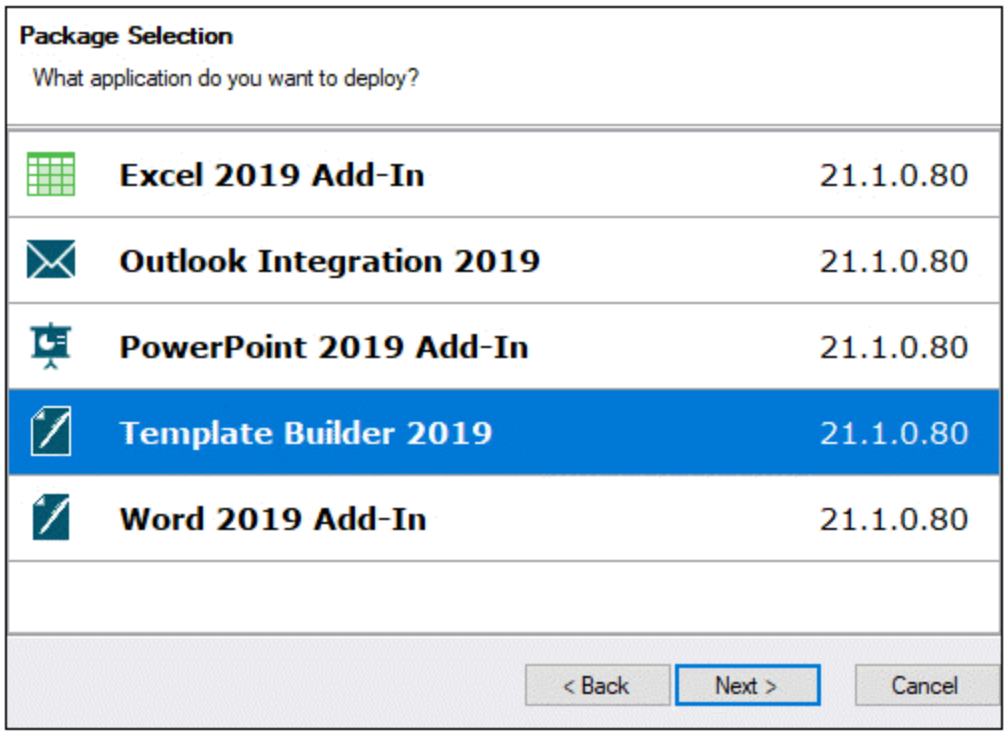
Select **Will be installed on local hard drive** to install the selected component.

Select **Entire feature will be installed on local hard drive** to install all components of the Template Builder feature.

For more information on using the MSI installer, see the section on installing with the standard (MSI) installer in the Hyland Office Products Installers chapter.

- From the ClickOnce Deployment: From the Package Selection dialog box, select the Template Builder 20XX component from the list, where XX represents the year of the Microsoft Office integration.

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For more information on installing using ClickOnce, see the section on installing using ClickOnce in the Hyland Office Products Installers chapter.

- From the Command Line: When installing components, pass the **Template_Builder** feature name to the installer using the **ADDLOCAL** property. For example, **msiexec /i "Office 2019 Integration x86.msi" ADDLOCAL=Template_Builder**. For more information on installing from the command line, see the section on controlling the installer from the command line in the Hyland Office Products Installers chapter.

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Document Imaging

The following information should be considered or noted when upgrading Document Imaging deployments. Read this information prior to upgrading your version of OnBase.

Server Machine Considerations

The following should be considered with regard to server machines:

- Beginning in OnBase 16, an enhanced version of the Bar Code Recognition Server processes bar codes on batches imported into the Unity Client using the Data Capture Server Windows Service. If you are upgrading from a version of OnBase prior to OnBase 16, and you are using the Bar Code Recognition Server to process bar codes in the Unity Client, you must install the Data Capture Server. For more information, see the **Data Capture Server Deployment Guide**.

End-User Workstation Considerations

The following should be considered with regard to end-user workstations:

- This version of Document Imaging for the Unity Client has additional upgrade considerations when upgrading from one of the following earlier versions:

  Any pre-Foundation releases prior to 18 SP 2

  Foundation EP1

  Foundation EP2

  Foundation EP3, prior to Patch 19

  - Foundation EP4

To prevent errors and loss of functionality when upgrading from any of these versions, you must ensure all instances of the Unity Client and the Application Server are also upgraded to the new version.

- The scanning logic architecture of Upgrade Considerations for the Unity Client has been rewritten to modernize the scanning hardware communication layer. If you are upgrading to OnBase Foundation EP5 and you encounter issues with the new scanning logic during testing, contact your first line of support.
- Beginning in OnBase Foundation EP1, the ability for Unity Client users to manage global scan formats is controlled by the **Global Scan Format Management** product right. In previous versions of OnBase, this ability was controlled by the **Document Imaging** product right. If you are upgrading to OnBase Foundation EP5 and want to ensure a user has the ability to manage global scan formats in the Unity Client, this user must belong to a User Group that has been granted the **Global Scan Format Management** product right.
- Beginning in OnBase 18, a change has been made to the database logic to improve batch processing performance. If you are upgrading from a version of OnBase prior to OnBase 18, batches that were committed in earlier versions of OnBase are not visible in the **Committed** batch status queue unless you manually migrate these batches to the appropriate database table. To migrate these previously committed batches and make

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them visible, in the OnBase Configuration module, select **Utils | Upgrade Data | Migrate Committed Scan Batches**. Once the migration is complete, a confirmation message is displayed.

When migrating scan batch data, note the following:

Batches committed in OnBase Foundation EP5 are automatically migrated to the appropriate database table and are thus visible in the **Committed** batch status queue.

Migrating committed batches from older versions of OnBase makes these older batches visible in the OnBase Client and the Unity Client.

- While an in-progress batch migration can be canceled, this cancellation does not roll back the entire migration process. Batches that have already been migrated to the new database table remain there, even if the full migration process is not completed.

- If you are performing Incremental Parallel Upgrades from a version of OnBase prior to OnBase 16, certain scan queues may become hidden in the Unity Client in the earlier version of OnBase. To make these hidden scan queues visible again, use the **Filter Scan Queues** dialog box to add the hidden queues back to the **Assigned Scan Queues** list.

Additional Licensing Considerations

The following should be considered with regard to licensing:

- To use Document Imaging for the Web Client, your solution must be licensed for the Web Server. This license may include additional upgrade considerations to review. For more information, see the **Web Server** module reference guide.

The following information should be considered or noted when upgrading Studio deployments. Read this information prior to upgrading your version of OnBase.

Import/Export Considerations

The following should be considered with regard to importing and exporting in Studio:

- When using the Import/Export tool, for best results, ensure that the version and build from which you are exporting matches the version and build to which you are importing (i.e. 15.0.1.94 used to export, 15.0.1.94 used to import).
- If restoring a backed-up database, or using an export file to rapidly set up a new environment, it is important to ensure that all the required Disk Groups and the System Documents are already configured. When using Studio to import a configuration file, a system verification report is generated after importing. If the System Documents are not configured properly, an error will be displayed and the process will have to be executed again after the Disk Groups and System Documents have been configured.

Post-Upgrade Considerations

The following should be considered with regard to post-upgrade maintenance in Studio:

- It is highly likely that after upgrading you will find new System Document Types available within OnBase. Navigate to **Document | Document Types** in the Configuration

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module in order to assign these new Document Types to the appropriate System Disk Group and System Document Type Group.

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Release Notes

Created ActiveX controls for version 21.1.0

Software Correction | Ticket #: 327453 | Fixed in: 21.1.0.9

Pressing Shift+Tab keys shifts focus incorrectly using Unity Script Ext. AFKS

While using Unity Script Ext. AFKS, pressing Shift+Tab keys moves the focus to respective upper field

Software Correction | Ticket #: CSFMD-717 | Fixed in: 21.1.0.83

Tab shifts focus to Doc Type Group drop down using Unity Script Ext. AFKS

While using Unity Script Ext. AFKS, pressing Tab key moves the focus to respective lower/next field.

Software Correction | Ticket #: CSFMD-453 | Fixed in: 21.1.0.73

Select Keyset pop-up dialog now has "Toggle Column Filters" option

Software Correction | Ticket #: CSFMD-1269 | Fixed in: 21.1.3.1000

The F6 shortcut successfully expands Autofills within the Unity Client.

The F6 shortcut key successfully expands Autofill Keyword Sets within the Unity Client. This fixes a previously found error, allowing users to quickly and easily expand Autofill Keyword Sets in the Unity Client with one keystroke.

Software Correction | Ticket #: CSFMD-1283 | Fixed in: 21.1.4.1000

End users are able to access the Reverse Autofill Lookup button even if the document type has a Hidden keyword on it.

Previously end users were not able to access the Reverse Autofill Lookup button if the document type they are indexing into has a Hidden keyword value on it.

Software Correction | Ticket #: CSFMD-1256 | Fixed in: 21.1.4.1000

The F6 shortcut successfully expands Autofills within the Unity Client.

The F6 shortcut key successfully expands Autofill Keyword Sets within the Unity Client. This fixes a previously found error, allowing users to quickly and easily expand Autofill Keyword Sets in the Unity Client with one keystroke.

Software Correction | Ticket #: CSFMD-1283 | Fixed in: 21.1.4.1000

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Reverse Autofill Keyset exclusions are now respected in the Web Client

Keywords marked with exclusions will not be populated with values from the AutoFill Keyset when using Reverse AutoFill lookup during Document Import.

Software Correction | Ticket #: CSFMD-1423 | Fixed in: 21.1.5.5

SCR# 326583 - LRM Dialog resizing for 20.3.2 -Russian File fix

Sanil has mentioned that Russian does not seem to be getting updated with the new dialog resizing. I need to look through the build tools to ensure the file is being processed correctly.
Support ID : 1292143

1213432

1167496

1206425

1385588

Enhancement | Ticket #: QC-40 | Fixed in: 20.8.1.1000

Invalid Login attempts are properly logged

Invalid Login attempts are now properly logged, giving administrative users better, more accurate knowledge of when invalid logins are attempted.

Software Correction | Ticket #: QC-724 | Fixed in: 21.1.3.1000

Open Source Notices have been updated for the Thick Client and OnBase Configuration.

Open Source Notices have been updated for the Thick Client and OnBase Configuration. This lets users have up-to-date licensing information for OnBase.

Enhancement | Ticket #: QC-656 | Fixed in: 21.1.3.1000

BP - Medical Configuration Options are visible to users with no rights

The following menu options need to be hidden when a user with no rights besides being able to log into config, logs in.
* Medical > Healthcare Clients
** Document Collections
** Emergency Access

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* Report
** Document Retention > Document Types

The medical options were added in [http://dev-tfs:8080/tfs/HylandCollection/OnBase/_versionControl/changeset/334685]

Enhancement | Ticket #: CONFIG-1402 | Fixed in: 20.8.1.1000

Medical Configuration Options are visible to users with no rights

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The medical options were added in [http://dev-tfs:8080/tfs/HylandCollection/OnBase/_versionControl/changeset/334685]

Enhancement | Ticket #: CONFIG-1396 | Fixed in: 20.8.1.1000

TS Top Issue - (MS Word) SCR #326178 - Restricted user cannot "Save as new document" for certain restricted keyword configuration

QA JIRA: [https://jira.hylandqa.net/browse/CSFM-1974]

Parent SCR: [http://s/scr/326540]

MS Word SCR: [http://short/scr/326178]

+ €œSave as a New Document € MS Word Scenario+
* Log in to Unity as restricted user

- Retrieve the Word document with doc handle 347559
- Modify the Word document and Save
- Choose "Save as New Document"
- On the Import Dialog ensure that the "1406200 DT" Doc Type is selected and there is a value for the "Read" readonly keyword, select Import
- Choose "Save as New Document" and enter a comment

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* *Actual Result*
** Error: There was a problem while attempting to upload your document. Please contact your administrator.
* *Expected Result*
** Document is created

Enhancement | Ticket #: CSFMD-31 | Fixed in: 20.8.1.1000

SCR #307273 - Exception when retrieving a document from a currency Keyword Type in a MIKG which is assigned a format other than "Workstation Regional Settings"

Documents using a currency Keyword Type in a MIKG which are assigned a currency format other than "Workstation Regional Settings" are properly retrieved and displayed

Software Correction | Ticket #: CSFMD-695 | Fixed in: 21.1.0.73

Addressed an issue in the Unity Client where AutoFill Keysets may not expand when re-indexing multiple documents

Updated the Unity Client to allow AutoFill Keysets to expand properly on the re-index dialog when multiple documents are selected for re-index.

Software Correction | Ticket #: CSFMD-1343 | Fixed in: 21.1.4.1000

Multiple Documents with Restricted Keywords can be queued for upload.

End users are able to simultaneously queue multiple Documents with Required Keywords without entering Required Keyword values.
Values must be entered before executing the import.

Software Correction | Ticket #: CSFMD-1276 | Fixed in: 21.1.4.1000

Addressed an issue in the Unity Client where AutoFill Keysets may not expand when re-indexing multiple documents

Updated the Unity Client to allow AutoFill Keysets to expand properly on the re-index dialog when multiple documents are selected for re-index.

Software Correction | Ticket #: CSFMD-1343 | Fixed in: 21.1.4.1000

In Unity Client, the warning message will display when importing or re-indexing a document with double-byte characters if keyword values exceed keyword length.

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In Unity Client, the warning message will display when importing or re-indexing a document with double-byte characters if keyword values exceed keyword length.

Software Correction | Ticket #: CSFMD-1367 | Fixed in: 21.1.4.1000

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In Unity Client, the warning message will display when importing or re-indexing a document with double-byte characters if keyword values exceed keyword length.

Software Correction | Ticket #: CSFMD-1367 | Fixed in: 21.1.4.1000

A more informative error is displayed in the Unity Client UI and detailed error is logged to Unity Diagnostics.

There is improved error handling when re-indexing from a document type to another document type with the same MIKG but different keyword configurations as as restricted user.

Software Correction | Ticket #: CSFMD-1249 | Fixed in: 21.1.4.1000

A more informative error is displayed in the Unity Client UI and detailed error is logged to Unity Diagnostics when keyword configurations differ.

There is improved error handling when re-indexing from a document type to another document type with the same MIKG but different keyword configurations as a restricted user.

Software Correction | Ticket #: CSFMD-1249 | Fixed in: 21.1.4.1000

Multiple Documents with Restricted Keywords can be queued for upload.

End users are able to simultaneously queue multiple Documents with Required Keywords without entering Required Keyword values.
Values must be entered before executing the import.

Software Correction | Ticket #: CSFMD-1276 | Fixed in: 21.1.4.1000

End-users without the Access Restricted Keywords privilege are able to save documents with Hidden Keywords.

An issue was fixed in the HTML Web Client to allow users without the "Access Restricted Keywords" privilege to save documents with hidden keywords. This issue was addressed in the Add/Modify, Re-Index, and HTML Send To > Create New Document contexts.

Software Correction | Ticket #: CSFMD-1238 | Fixed in: 21.1.5.6

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Users do not lack the option to 'Create as revision of original document' from Send To | Create New Document for revisions that are not the most recent.

After this fix, Users do not lack the option to 'Create as revision of original document' from Send To | Create New Document for revisions that are not the most recent.

Software Correction | Ticket #: 292269 | Fixed in: 21.1.0.12

Documents exported in Thick Client do not include XML stylesheet using the Send To | Create New Document and the Unity Client does include the stylesheet and document data in the exported document.

When creating a new document in OnBase and using an existing xml document with a stylesheet configured, the resulting document will not merge the xml and stylesheet together, but rather only use the base xml document.

Software Correction | Ticket #: CSFPR-655 | Fixed in: 21.1.0.156

When rapidly clicking through Workflow Inbox documents or Related items with Auto Display Keyword and custom Workflow layout, the following error is thrown: 'This visual is not connected to a presentation Source'

When rapidly clicking through Workflow Inbox documents or Related items with Auto Display Keyword and custom Workflow layout, no longer received the following error 'This visual is not connected to a presentation Source'.

Software Correction | Ticket #: CSFPR-840 | Fixed in: 21.1.0.152

Unable to switch between institutions when not an institutional super user

It is now able to switch between institutions when not an institutional super user.

Software Correction | Ticket #: CSFPR-801 | Fixed in: 21.1.0.138

30-60 second delay with Unity Client User Administration panel

Improved loading time for User Administration panel in Unity Client

Software Correction | Ticket #: CSFPR-839 | Fixed in: 21.1.0.162

Errors appear when rapidly scrolling through a image rendered text file that has 10+ pages: "There was an issue rendering the document. Please close the viewer and try again"

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The errors no longer display when rapidly scrolling through a image rendered text file that has 10+ pages.

Software Correction | Ticket #: CSFPR-797 | Fixed in: 21.1.0.138

SCR #272475 - Resize the IdP SAML Unity Window when entering Shibboleth credentials so the screen is not cut off

The Unity Client idp window now has the ability to be resized, while persisting it's size and location

Software Correction | Ticket #: CSFPR-649 | Fixed in: 21.1.0.100

Getting an Error when attempting to Generate a Text Report in the Unity Client.

While attempting to generate a Text Report in the Unity Client, the generated Text search reports are being properly archived to OnBase as a document in the SYS Search Reports Document Type.

Software Correction | Ticket #: CSFPR-481 | Fixed in: 21.1.0.101

Send to Mail Recipient functionality is not attaching documents as expected

Corrections: Addressed an issue where selecting multiple items in a results hitlist and performing a "Send To Mail" action could result in incorrect documents being attached to the email.

Software Correction | Ticket #: CSFPR-277 | Fixed in: 21.1.0.19

Checksum is not being appended to DocPop URLs when generating a CSV file for a document with DocPop URL column included

Checksum is now being appended to DocPop URLs when generating a CSV file for a document with DocPop URL column included.

Software Correction | Ticket #: CSFMD-696 | Fixed in: 21.1.0.77

An error message is displayed when a user leaves the Import window open and leaves the Unity Client sit idle for 25-30 minutes

The timeout for keyword metadata being stored in memory on the application server is now configurable via the new "KeywordDataCacheTimeout" web.config setting.

Software Correction | Ticket #: CSFMD-473 | Fixed in: 21.1.0.123

Rendering error is no longer received when scrolling through the pages of an image rendered document

Rendering error is no longer received when scrolling through the pages of an image rendered

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document

Software Correction | Ticket #: CSFPR-1007 | Fixed in: 21.1.2.1000

A new configurable option has been added to the Unity Client to allow a user to switch between authenticating with the embedded CEFSharp Browser or the default System Browser (ex: Chrome, Firefox, Edge, etc)

A new configurable option has been added to the Unity Client to allow a user to switch between authenticating with the embedded CEFSharp Browser or the default System Browser (ex: Chrome, Firefox, Edge, etc)

Enhancement | Ticket #: CSFPR-1015 | Fixed in: 21.1.2.1000

The incorrect revision is no longer made read-only when signing an E-form

If an e-form is modified by adding keywords and saving during the process of signing the e-form with a digital signature, the digital signature is added to the correct revision.

Software Correction | Ticket #: SBPPA-1962 | Fixed in: 21.1.4.1000

Fixed editable note text focus

Resolved the issue when the note text not setting the focus on the editable note text field.

Software Correction | Ticket #: CSFPR-1328 | Fixed in: 21.1.4.1000

Documents no longer appear blurry after being rotated

Updated the Unity Client so that documents no longer appear blurry after being rotated 270 degrees. This ensures that users will not worry about losing image quality while editing their documents in the Unity Client.

Software Correction | Ticket #: CSFPR-1290 | Fixed in: 21.1.4.1000

During the page append process, end users can successfully choose an image file type if the incorrect file type was previously chosen.

An error was fixed that prevented end users from being able to append pages to an image during import if they had initially selected a non-image file before selecting the images in the Unity Client.

Software Correction | Ticket #: CSFMD-1444 | Fixed in: 21.1.4.1000

A user is able to continue with an import after a system loses connection to the

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Application Server and reconnects.

If the Application Server connection is lost during document import, the user is notified and is given the option to reconnect to the application server. Upon reconnecting, the keyword panel is reset and the user may try their import again.

Software Correction | Ticket #: CSFMD-1445 | Fixed in: 21.1.4.1000

The Document Import queue is now refreshed and cleared when a user navigates to another layout.

Queueing multiple documents for import and then exiting the Import process by navigating to another layout, such as Document Retrieval, clears the entire Import queue. This prevents documents being erroneously imported when a separate, unrelated import process is started.

Software Correction | Ticket #: CSFMD-1450 | Fixed in: 21.1.4.1000

The incorrect revision is no longer made read-only when signing an E-form

A correction was made to a previous error that caused the original revision to be made read-only when signing an E-form instead of the latest revision. This change brings greater stability for E-forms in the Unity Client.

Software Correction | Ticket #: SBPPA-1962 | Fixed in: 21.1.4.1000

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Software Correction | Ticket #: CSFMD-1450 | Fixed in: 21.1.4.1000

An end user is able to retry an import after an Application Server reconnect occurs.

If the application server connection is lost during document import, the user is notified and is

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given the option to reconnect to the application server. Upon reconnecting, the keyword panel is reset and the user may try their import again.

Software Correction | Ticket #: CSFMD-1445 | Fixed in: 21.1.4.1000

Changed the selected thumbnail to retain the blue bounding box

Changed the selected thumbnail to retain the blue bounding box when it is not actively focused. To distinguish between the actively selected thumbnail and the thumbnail that is moused over, there is a slightly lighted blue shade to represent the moused over thumbnail.

Software Correction | Ticket #: CSFPR-1339 | Fixed in: 21.1.4.1000

Application Server does not log service requests if authentication fails

When authentication on the Application Server fails, we now indicate in the log message which service request was attempting to authenticate.

Enhancement | Ticket #: RIP-1447 | Fixed in: 21.1.0.58

Race condition with registering workstation

An exception is no longer displayed when registering a workstation fails

Enhancement | Ticket #: RIP-1792 | Fixed in: 21.1.0.43

Implement core access token code changes

Logging in using Idp no longer consumes multiple licenses in cases that it shouldn't.

Enhancement | Ticket #: RIP-1634 | Fixed in: 21.1.0.24

Update Application Server code for HL7 message to use New Hyland.Web.AppServerPop Configuration

Administrators must enter a checksum key in the web.config file for the AppServer for the "Checksumkey" (this previously was called DPChecksum).Â

Software Correction | Ticket #: HC-131938 | Fixed in: 21.1.0.122

Unable to move between documents with the arrow keys or Pg Up and Pg Dn keys in Batch Scanning or Batch Processing

Arrow keys working as expected in Batch Scanning/Processing

Software Correction | Ticket #: FDTN-127 | Fixed in: 21.1.0.31

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N/A

Software Correction | Ticket #: FDTN-1616 | Fixed in: 21.1.2.1000

Update ASG for Tiered Licensing

The Gateway Caching Server now supports tiered licensing.

Enhancement | Ticket #: RIP-1902 | Fixed in: 21.1.0.81

If the Desktop Host service is installed but the OBAService is not, OLE documents cannot download

When Desktop Host Installed, OBAService not installed, the OpenInOBA feature seems to prevent the document from being downloaded by the browser.

See attached email for more information.

Note: this is not a huge concern as currently there is not way to only install the Desktop Host service and not the OBAService. The OBA folder would need to be manually deleted for this issue to occur. However, we will address this scenario for EP 4+ as the Desktop Host installer may one day become more granular.

Enhancement | Ticket #: OT-5 | Fixed in: 20.8.1.1000

Using Web Client OBA documents are not displaying latest revision within Document Retrieval hitlist, also seeing error when selecting latest revision from Renditions/Revisions

When viewing the Renditions/Revisions list for an Office document in the Web Client, users will be able to open past revisions.

Software Correction | Ticket #: OI-124 | Fixed in: 21.1.0.162

Web Client Locking Word Docs

The Web Client will no be locked by notification messages when a user is launching into the Office Business Application from the Web Client into a locked document

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Software Correction | Ticket #: OI-125 | Fixed in: 21.1.0.156

fix EP5- When working within Workflow and executing a task to 'Display Document' on a related Excel document, the following error is thrown "The calling thread cannot access this object because a different thread owns it." when the 'Open Microsoft

Errors will no longer display when working within Workflow and executing a task to "Display Document" on a related Excel document

Enhancement | Ticket #: OI-94 | Fixed in: 21.1.0.94

OnBase does not perform a lock check when saving the document, only when initially loading it

The OBA add in has been updated to verify that lock checks occur when a user attempts to save a document.

Software Correction | Ticket #: OI-96 | Fixed in: 21.1.0.123

IMPLEMENT FIX - Users are prompted to log in when attempting to save a document opened through Desktop Host from an HTML Web Client.

The Desktop Host Office Business Application (OBA) Service will share sessions with the OBA, no longer requiring a user to log in when launching into the OBA from the HTML Web Client

Software Correction | Ticket #: OI-30 | Fixed in: 21.1.0.104

Implement fix: User does not receive a message indicating that an Office document is locked by another user (SCR 327079)

A toast notification ill display in the Office Business Application when the document is locked by another user

Enhancement | Ticket #: OI-31 | Fixed in: 21.1.0.55

Implement fix: 'Save As' Excel window opens when attempting to open Excel Document from the OnBase Client

A "Save As" window no longer appears when opening an Excel document in the OnBase Client

Enhancement | Ticket #: OI-15 | Fixed in: 21.1.0.48

Auto Import Folder adding a second instance of a MIKG by default.

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When using an autoimport folder for documents with multi instance keyword groups, the keyword fields are displayed and populated with the expected keywords

Software Correction | Ticket #: OUTI-107 | Fixed in: 21.1.0.153

EP 5: Chinese characters in the TO and SUBJECT line of an email imported through Outlook Integration appear as symbols or Question marks.

Display issues related to Chinese characters in the TO or SUBJECT line of emails imported through the Outlook integration have been resolved

Software Correction | Ticket #: OUTI-71 | Fixed in: 21.1.0.33

IMPLEMENT FIX -Unable to import document after changing Document Type and common keywords are kept

Users can successfully import multiple attachments to different Document Types that share common keywords

Software Correction | Ticket #: OUTI-83 | Fixed in: 21.1.0.67

IMPLEMENT FIX - Users are unable to import attachments through the outlook addin when configured with autofill restricted keywords

Read Only Keywords in Autofill keyword sets will no longer cause import to fail in the Outlook addin.

Software Correction | Ticket #: OUTI-112 | Fixed in: 21.1.0.89

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