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What's new in OnBase Foundation 23.1?

Summary

OnBase Foundation 23.1 is a significant release that includes over 40 areas of enhancements to Hyland's OnBase platform and solution capabilities. The introduction of OnBase App Builder and OnBase Apps eases end-user adoption of solutions through an improved user experience tailored to their job tasks, terminology and usage patterns. Web Client enhancements facilitate the transition of users from OnBase Client or Unity Client to the Web Client for browser-based solution delivery, minimizing management of desktop clients. The release enables user mobility with enhanced user experiences on tablets and expanded capabilities on mobile devices. The Epic Chart Search and SAP AP solutions are enriched to provide smoother user experiences and automation of information processing.

Benefits

- Empowers administrators to configure role-centric web-based user experiences as OnBase Apps

- Enables rich collaboration on PDFs with external solution participants outside of OnBase

- Provides improved Web Client appearance, navigation, usability and accessibility on desktop and tablet

- Assists further adoption of OnBase Mobile with an improved user experience and expanded capabilities

- Optimizes administration of OnBase while offering improved security, serviceability and extensibility to administrators and solution developers

Key features

App Builder

With the new 23.1 release of OnBase, administrators can create role-centric user interfaces for different parts of their organization based on how users interact with content and in the user's terminology.
This results in simplified user experiences tailored to the job tasks, terminology and usage patterns of the user. With views streamlined to only content and functionality that is relevant to specific roles, users will require less time to become familiar with the applications. OnBase Apps can be accessed by end users in the supported browser of their choice on desktop and tablet devices for ease of participation in solutions.

Web Client enhancements

1. Enhanced PDF viewer

The PDF viewer in the Web Client features major enhancements, reducing the need for third-party PDF tools. The improved version comes with a new default setting in web.config and provides native PDF functionality while retaining the ability to collaborate in OnBase via notes and annotations. Users can perform the following actions on PDF documents:

- Search and select text, and copy to clipboard

- Interact with hyperlinks (to other locations within the document and to external website links or email addresses)

- Use pre-existing bookmarks

- Apply notes and annotations

- Export PDF with notes and annotations included

2. Feature additions

OnBase 23.1 facilitates easier end-user transition from OnBase Client (Thick) to the OnBase Web Client with capabilities formerly available only in the OnBase Client. This increases the viability and adoption of the OnBase Web Client by enabling browser-based delivery of solutions and avoidance of desktop client deployment and management.
Users can now perform more capabilities in the OnBase Web Client with less dependency on the OnBase Client by leveraging the following enhancements:

- For scanned batches, users can now see items awaiting commit and can mark the batches as ready to commit.

- Users will also be able to manage document distribution recipients.

- Text report viewer features have been added to include search, select/highlight text and right- click functions.

3. Accessibility updates

Increased usability for everyone, especially users who are sensitive to contrast, is featured in this release. The pastel green and pink in header text, buttons and icons have been switched to a darker blue to provide better contrast ratios in both light and dark mode. These changes were made across the Web Client. In addition to improving usability and accessibility, the higher contrast ratios ensure increased compliance with WCAG 2.1 guidelines because they exceed the WCAG 2.1 AAA minimum contrast ratio of 7:1.

4. Single-window mode

This user experience enhancement allows the Web Client to be presented in a single browser window without opening new tabs or floating dialog/popup windows that can be difficult for users to navigate. Single-window mode provides a better navigation experience on smaller desktop displays and tablets with less screen real estate. The enhancement is delivered as a user-selectable option, allowing users to switch between single-window mode and classic mode based on their use case. When enabled, dialogs displaying or requesting additional information will be displayed as either a full-screen modal or a side panel, depending on the layout of the item being displayed, such as document viewer, keywords, notes and document properties.

5. Tablet support

User experience is enhanced when using tablets to access the Web Client, enabling customers to be more mobile while using OnBase. Leveraging touch gestures on tablets with a touchscreen, users can:

- Pinch to zoom

- Scroll and pan

- Single click (tap) to open a document

- Access right-click menu via a new button

Mobile enhancements

We have now closed the major functionality gaps between the legacy OnBase Mobile apps and the new OnBase Mobile client that is accessed through Hyland Mobile, significantly easing any barriers to an upgrade. The new version of OnBase Mobile provides the same UI and features across iOS and Android, delivering consistency from both a user-experience and feature-functionality perspective. For example, the new OnBase Mobile client provides the ability to utilize forms and workflow tasks.

All form types are now supported in OnBase Mobile:

- E-forms
- Unity forms
- Image forms

Additional workflow tasks are now supported in OnBase Mobile:

- Display form for input
- Create new form
- Add note
- Send to user (load-balanced queue)

Admin portal enhancements

We've improved the solution administrator access and user experience for administering configurations formerly managed in the Configuration module. This provides all customers with access to Configuration from any browser-enabled device and hosted customers with access to additional OnBase solution configuration parameters without requiring a Citrix session to access the Configuration module.

New features in the OnBase admin portal:

- Additional user group privilege administration, including:
  - Default document
  - Folder
  - Scan/index
  - Client features
  - Client-based products
- Keyword type groups
- Document type groups
- File formats

REST API enhancements

Customers can now integrate and automate form-centric solutions with external systems by evaluating form data to initiate activity or updates to external systems. By exposing REST API, integrated solutions can consume e-form, unity form, document history, workflow history and security keyword data to evaluate the state of content in the system and leverage the same information to drive AI automation decisions.

Examples include retrieval of:

- E-forms and unity forms data
- Document history
- Workflow history
- Security keywords for a user
- Security keywords for a user group

Platform enhancements

The latest OnBase platform offers TLS 1.3 support for inbound connections, such as app server, web server, API server and integration points. Customers can leverage the highest TLS encryption security standard for secure inbound HTTPS connections from browsers, applications and other systems to all OnBase modules.

Additionally, OnBase 23.1 includes an update from .NET Framework 4.7.2 to 4.8 as the latest, final and most secure version of .NET Framework. These enhancements will allow users to operate with confidence in the security of the application and their solution data managed within OnBase.

Additional features

AP global enhancements for SAP

This feature improves efficiency when vendors are paid through designated bank accounts while reducing exception handling time. Additionally, it will reduce regulatory risk and avoid potential penalties associated with withholding tax regulations and compliance.

OnBase integration for Epic Chart Search

This feature allows users to view their OnBase content alongside their Epic content in the search results from Epic Chart Search. Using optical character recognition technology, Epic Chart Search provides context to search results by searching within the document's content and metadata. This allows for a
smoother end-user experience, where users can view results from both OnBase and Epic in one place.

Hyland Credentials 1.0

This feature allows institutions to design their own credentials, import recipient data and digitally issue records quickly and easily. Hyland Credentials enables instant, independent digital verification of credentials via a convenient,
secure and decentralized system powered by blockchain technology, ensuring transparency, accountability, oversight and risk reduction for organizations.

To learn more about our latest features, check out the interactive video gallery, release notes and documentation portal: What's New in OnBase?
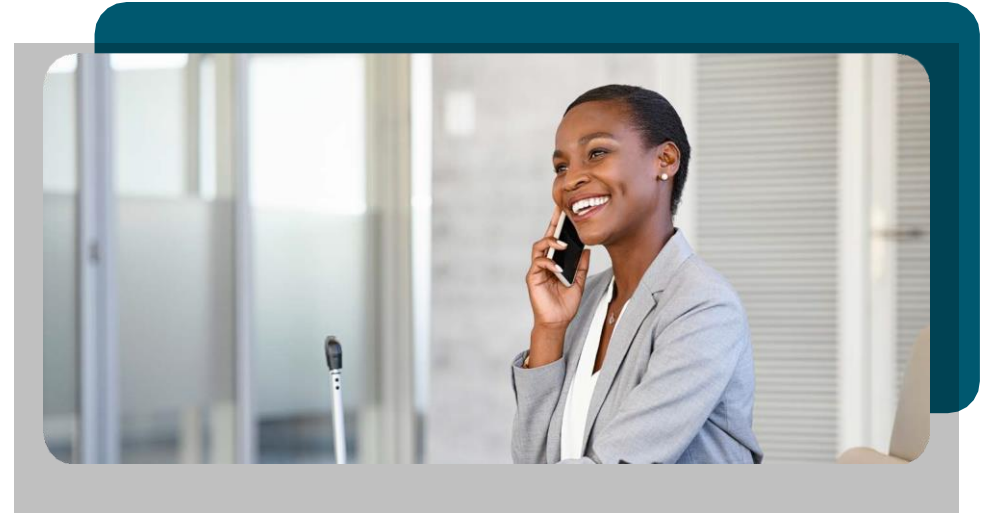
OnBase version lifecycle updates

The OnBase 23.1 release signals the final year of active development for OnBase 22.1, with monthly service releases, and the end of active development for OnBase EP5, with no further monthly service releases. The OnBase EP3 release has not received monthly services releases since March of 2023 to provide software corrections or security updates. Customers residing on OnBase EP3 accept the risk of running an unpatched version of the software and the third parties that it is dependent upon.

For more information, review the **OnBase Foundation version lifecycle**.

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