

OnBase App Builder



The new App Builder in the OnBase 23.1 release represents a transformational shift in the OnBase user experience by enabling intuitive persona-based experiences. With streamlined views of only the content and functionality relevant to a role, App Builder presents OnBase solutions as modern web apps in the user's terminology.

OnBase administrators can create different applications for their end-users based on their persona and specific job function. Administrators can also create content-centric applications with multiple layouts based on how their users need to interact with content.

Features

- Supported sources include document types, forms, custom queries, custom folder queries, workflow queues and reporting dashboards.
- Supported actions include importing document(s), creating Unity forms, opening custom URLs, navigating to source, workflow ad-hoc tasks and system tasks.
- Chrome, Edge, Safari and Firefox are supported on desktops and tablets.
- Web client usability enablers
 - Theming updates
 - Embedded content mode
 - Tablet navigation and gesture support

Benefits

- An intuitive interface that enhances the overall persona-based user experience, making it easier and more enjoyable for users to interact with OnBase
- Increased productivity through well-defined workflows that make tasks more efficient for users
- Cross-platform compatibility to facilitate the creation of applications that work seamlessly across different platforms
- Greater customization capabilities to incorporate design and functionality that align with end-user requirements

Overall, a modern software interface is essential for keeping up with user expectations, industry standards and technological advancements.

The OnBase App Builder is more than just improved colors, spacing and other stylistic elements. Users no longer need to learn OnBase terminology or see their functionality organized by module. Instead, users see language in their application that relates to the work they're doing, and their functionality will be organized by their use case.

User experience

Below are sample screenshots from the user interface, providing a preview of the user experience.

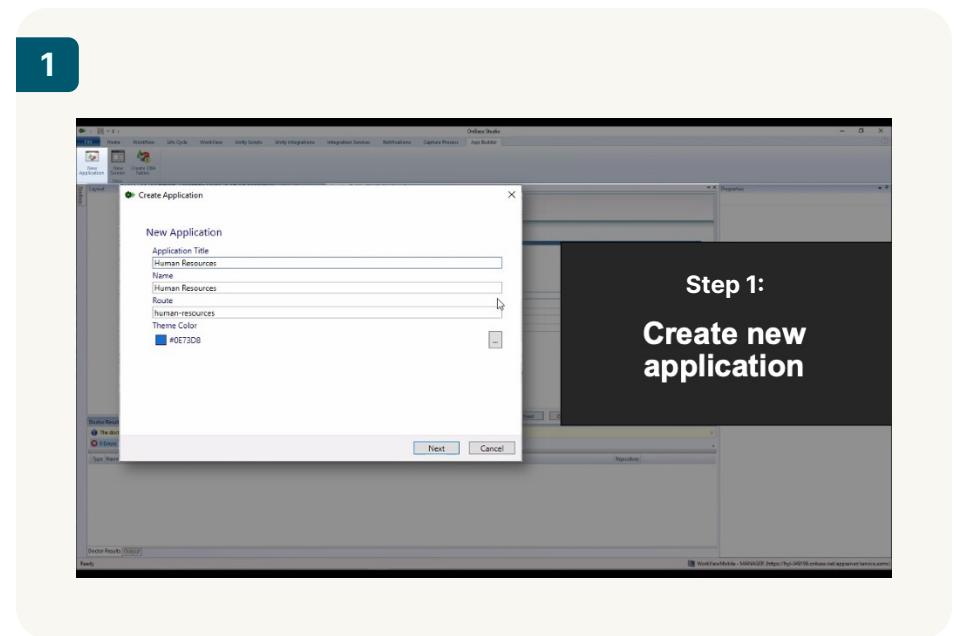


OnBase administrator

Scenario
Ana is tasked with producing a new HR employee file management solution.

Ana can assemble new apps in four simple steps using OnBase App Builder.

The slide features a woman with her arms crossed on the left and text on the right, all within a white-bordered box on a dark teal background.

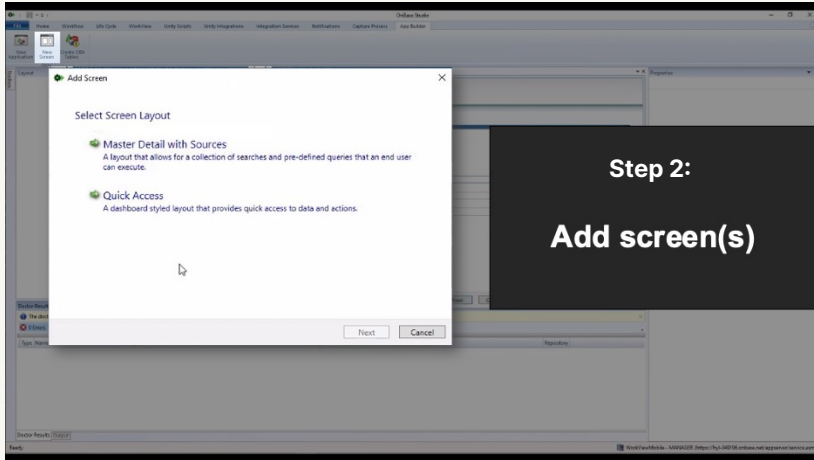


1

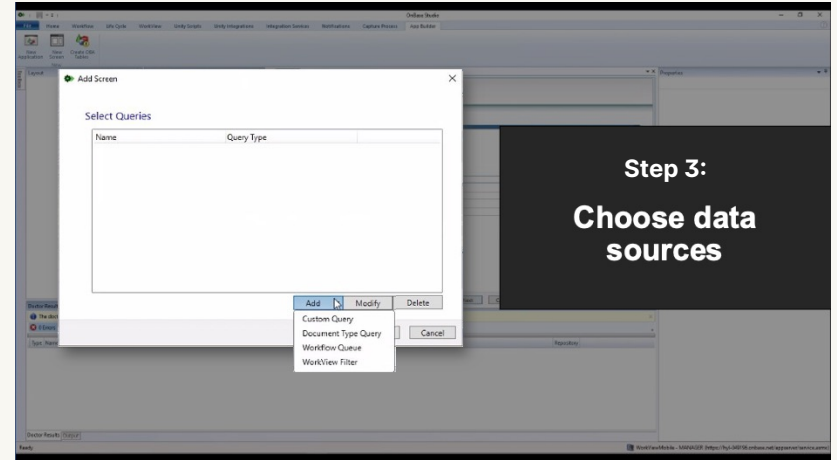
Step 1: Create new application

The screenshot shows the OnBase App Builder interface with a 'Create Application' dialog box open. The dialog contains the following fields: Application Title, Name (with 'Human Resources' entered), Route (with 'Human Resources' entered), and Theme Color (with '#0E73DB' selected). 'Next' and 'Cancel' buttons are at the bottom. A large black overlay with white text 'Step 1: Create new application' is positioned on the right side of the dialog.

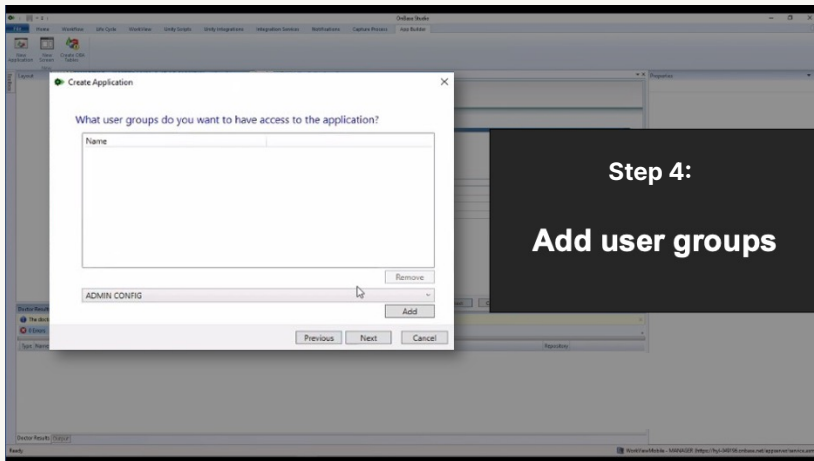
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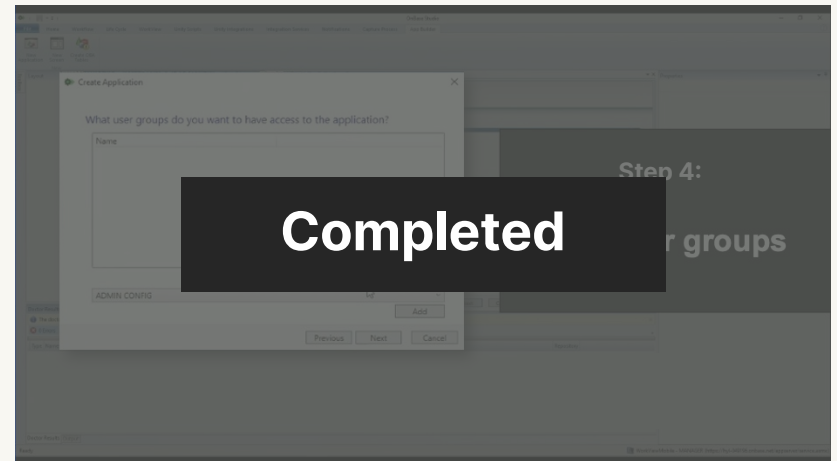
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HR staff

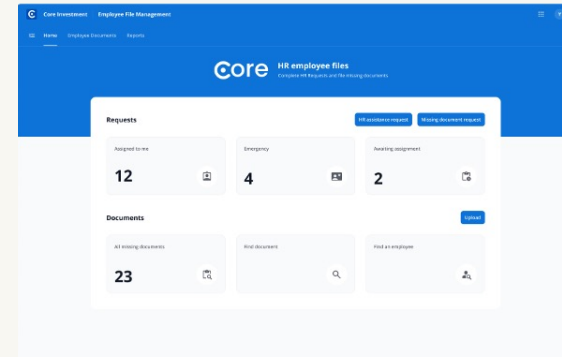
Scenario

Erika needs to ensure documents are up to date for all new hires.

Erika can access the newly published human resources app to find employees with missing documents.



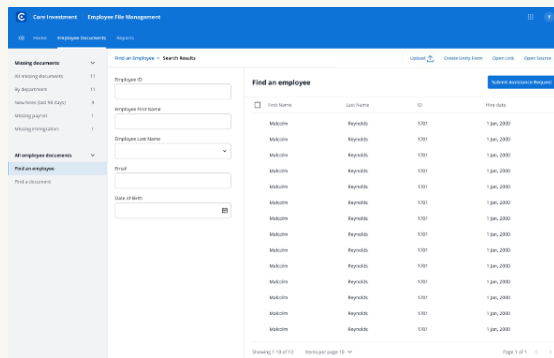
1



Quick-access layout

Provides an overview of critical information and shortcuts to commonly used actions

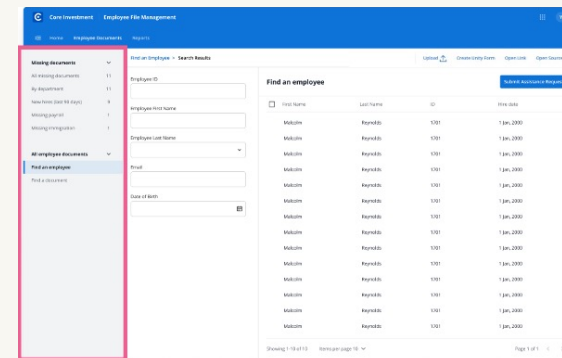
2



Master-detail layout

Provides users a navigable list of data sources and a detail view for browsing content and taking actions

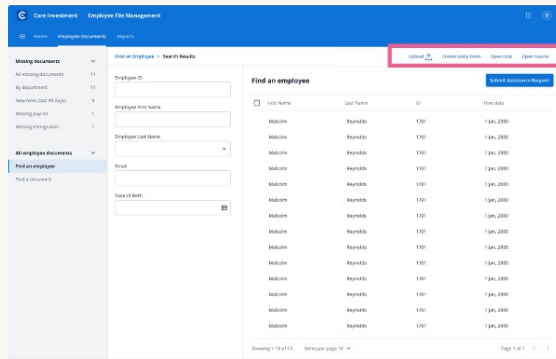
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Supported source types for 23.1

- Document types
- Forms
- Custom queries
- Custom folder queries
- Workflow queues
- Reporting dashboards

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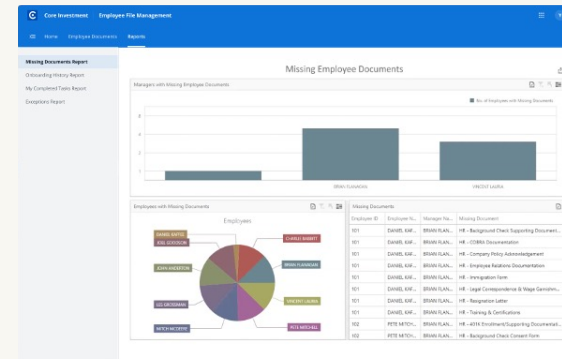
Actions can also be configured specific to each source.

Supported actions for 23.1 include:

- Import document(s)
- Create unity form
- Open custom URL
- Navigate to source
- Workflow ad-hoc tasks
- System tasks

Learn more about [OnBase](#).

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Reporting dashboards

Reports can be linked as data sources to provide relevant information in context.

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The screenshot shows the 'HR Assistance Request' form. It includes fields for Employee ID, Department, Position, Manager Name, Location, and Category. There are also dropdown menus for Employment Status and Request Status. A text area is provided for the Description, and a section for 'Request Documents' is visible at the bottom.

Forms

Links to related forms can also be configured for easy access.