



# Installation Requirements

## Reference Guide

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# GENERAL REQUIREMENTS CONSIDERATIONS

## Overview

This guide outlines requirements information that should be considered before upgrading to OnBase Foundation EP5. See the appropriate sections that follow for details on general or module-specific OnBase requirements. Wherever the module-specific requirements differ from the general requirements, the module-specific requirements prevail.

For additional information on the technical requirements for installing OnBase Foundation EP5, see the **Technical Requirements Overview for New Installations and Upgrades**.

## General Requirements

The following sections outline general requirements information that should be considered when upgrading to OnBase Foundation EP5. These requirements apply to multiple modules in the OnBase product suite.

- [Database Requirements](#)
- [Operating System Requirements](#)
- [Web Browser Requirements](#)
- [OnBase Client Hardware Requirements](#)
- [Server and Core Services Hardware Requirements](#)
- [Miscellaneous Requirements](#)

## Authentication

The following sections outline requirements information specific to the various methods used for authentication with OnBase Foundation EP5.

- [Active Directory and LDAP Authentication](#)
- [Active Directory Federation Services \(AD FS\)](#)
- [Integration for Single Sign-On](#)
- [Single Sign-On for PeopleSoft Enterprise](#)

## Module-Specific Requirements

The following sections outline module-specific requirements information that should be considered when upgrading to OnBase Foundation EP5.

- [ACH Generator](#)
- [Advanced Capture](#)
- [Agenda](#)
- [Agenda Media](#)

- Agenda Voting
- AFP Input Filter
- Application Enabler
- Application Server
- Archive Services for Microsoft SharePoint
- Authoring, Export, and Publishing
- AutoFill Keyword Sets
- Automated Redaction
- Bar Code Generator
- Bar Code Processing
- Branch Capture Check Processor
- Business Activity Monitoring
- Business Indexing Connector for use with SAP ArchiveLink
- Business Rules Engine
- CAD Services
- Certificate Licensing
- Check 21
- Check Import Processor
- Client
- Client and Configuration Installers
- Client Connector for Deltek Costpoint
- COLD/ERM
- Collaboration
- Combined Viewer
- Connector for use with SAP ArchiveLink
- Content Connector for Microsoft SharePoint
- DeficiencyPop
- Diagnostics Service and Diagnostics Console
- Dictionary Import Processor
- Digital Signatures
- Directory Import Processor
- Disconnected Scanning
- Distributed Disk Services
- DJDE Input Filter
- DocPop
- Document Composition
- Document Distribution
- Document eCommerce
- Document Imaging
- Document Import Processor

- Document Knowledge Transfer & Compliance
- Document Packaging
- Document Retention
- Document Tracking
- Document Transfer
- EDI 810 Processor
- EDI 835 EOB Processor
- EDI 837 Processor
- EDI TS 130 Processor
- EDM Services
- E-Forms
- EIS Workflow Messaging
- Electronic Plan Review
- Encrypted Alpha Keywords
- Enterprise Integration Server
- Enterprise Web Access for Document Knowledge Transfer & Compliance
- Event Relay Server
- Exception Reports
- Express Scanning
- External Access Client
- External Mail Services
- FHIR
- FolderPop
- Front Office Scanning
- Full-Page OCR
- Full Text Search
- Gateway Caching Server
- Healthcare Form Manager
- HL7 Module
- Host Enabler
- Hyland Office Products Installers
- IA Connect
- IHE Solutions
- Image Forms
- Image Statements
- Integrated Office Viewer
- Integration for 3M CAC
- Integration for Accela
- Integration for Adobe Sign
- Integration for Azteca Cityworks Server

- Integration for Biscom FAXCOM
- Integration for Corelation Inc. KeyStone
- Integration for D+H Phoenix
- Integration for DocuSign eSignature
- Integration for Dolbey CAC
- Integration for eCopy ShareScan
- Integration for Epic
- Integration for Epic Canto and Epic Haiku
- Integration for Epic MyChart
- Integration for Esker Fax
- Integration for Esri
- Integration for Esri ArcGIS Desktop
- Integration for Guidewire InsuranceSuite
- Integration for HP Connect
- Integration for Jack Henry jXchange
- Integration for Medical Imaging Viewer (Agfa)
- Integration for Medical Imaging Viewer (Calgary Scientific)
- Integration for Medical Imaging Viewer (Merge)
- Integration for Medical Imaging Viewer (TeraRecon)
- Integration for Medical Imaging Viewer (Vital Images)
- Integration for Microsoft Outlook 2019
- Integration for Microsoft Search
- Integration for Netsmart Homecare
- Integration for Nuance CAC
- Integration for Open Text Fax Server, RightFax Edition
- Integration for Optum CAC
- Integration for Symitar Episys
- Integration for Tempest Development Group
- Intelligent Capture for AP
- Interaction with ShareBase
- Interactive Data Capture
- Keyword Update
- LOB Broker
- Mailbox Importer
- Media Server
- Medical Imaging Viewer - NilRead
- Medical Records Unity Client
- Message Broker
- Minutes
- Mobile Access for Android

- Mobile Access for iPad
- Mobile Access for iPad (Legacy)
- Mobile Access for iPhone
- Mobile Access for iPhone (Legacy)
- Mobile Healthcare
- Mobile Applications Broker Server
- Mobile eCapture
- OnBase for Meditech with ODA
- OnBase VNA
- Office Business Application for 2019
- Patient Window
- PCL Input Filter
- PDF Input Filter
- PDFPop
- Physical Records Management
- Print Distribution
- Public Sector Constituency Web Access
- Quick Access
- RCM Payment Processing
- RCM Payment Processing (Legacy)
- Records Management
- Release of Information (Unity)
- Remittance Processor
- Replicated Disk Groups
- Report Capture
- Report Mining
- Report Services
- Reporting Dashboards
- REQ Connect
- Signature Deficiencies for Epic
- Signature Pad Interface
- Statement Composition
- StatusView
- Storage Integration for EMC Centera
- Storage Integration for IBM Tivoli
- Studio
- System Administration
- Unity Briefcase
- Unity Client
- Unity Forms

- Unity Scheduler
- Virtual Print Driver
- VP Connect
- Web Application Management Console
- Web Parts for Microsoft SharePoint
- Web Server
- Web Services Publishing
- Workflow
- Workflow Approval Management
- WorkView | Case Manager
- WorkView Integration for Microsoft Outlook
- XML Index Document Import Processor
- XML Tag Import Processor

## Database Requirements

### Minimum OnBase Database Schema Version

OnBase Foundation EP5 upgrades the database schema to version 3.5-449. The OnBase Foundation EP5 software suite requires this minimum database schema version in order to operate properly.

### ADO.NET Connection Strings

Beginning in OnBase 18, ODBC connections can no longer be used to connect to the database for Core-based applications.

The default database connection method for OnBase servers and applications requires ADO.NET connection strings. An ODBC connection is still required for the OnBase Client and the OnBase Configuration module.

A connection string contains the information required to connect to a database, and each connection string has a unique identifying name for that data source connection. This unique data source name is referenced by other applications to connect to the database configured in the connection string.

Data source connection strings are configured in the configuration file of the application used to connect directly to the database. For example, the **connectionStrings** element in the Application Server web.config file contains a data source connection string for each database that the Application Server accesses. Other applications using the Application Server, such as the Unity Client or Web Server, access the database by referencing the unique data source name from the relevant connection string.

For more information on configuring ADO.NET connection strings, see the **Application Server** module reference guide.

## Databases Supported

The following sections list the databases supported in OnBase Foundation EP5.

### Microsoft SQL Server

The following versions of Microsoft SQL Server™ are supported:

- Microsoft SQL Server 2012 (all service packs)
- Microsoft SQL Server 2014 (all service packs)
- Microsoft SQL Server 2016 (all service packs)
- Microsoft SQL Server 2017
- Microsoft SQL Server 2019

When using Microsoft SQL Server databases, also note the following:

- Azure SQL Managed Instance is also supported.
- Beginning in OnBase Foundation EP1, Microsoft SQL Server 2008 and Microsoft SQL Server 2008 R2 are no longer supported.
- If you are using an ODBC data source to connect to the database, 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 2016, verify that the database client is SQL Server 2016 (or later). Running a previous client version, such as SQL Server 2014, will result in system instability and memory issues. For instructions on determining your server and client versions, see Database Client / Server Version Compatibility.

### Oracle

The following versions of Oracle® are supported:

- Oracle 12c (R2)
- Oracle 19c

When using Oracle databases, also note the following:

- It is strongly recommended that you have a certified Oracle Database Administrator on staff.
- If you are using ODBC drivers with your Oracle database, it is recommended that you select **Bind Timestamp to Date**.



## SAP SQL Anywhere

Beginning in OnBase Foundation EP1, SAP SQL Anywhere™ databases are no longer supported within the OnBase product suite. If you are using an SAP SQL Anywhere database and upgrading to OnBase Foundation EP5, you must migrate your OnBase solution to a supported version of a Microsoft SQL Server or Oracle database. For assistance with the migration process, contact Hyland Global Services.

## Database/File Servers

Server requirements are site-specific. Database/file servers should be dedicated purpose servers; that is, these servers should not be used as a domain controller, email server, print server, or proxy server. Network and disk I/O hardware should be optimized for performance and redundancy. Multiple network interface cards on servers are often required to minimize network bottlenecks.

## Database Client / Server Version Compatibility

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

- Ensure that your database client software version matches or exceeds the database server version.
- Ensure that 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 2016, verify that the database client is SQL Server 2016 (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.

## Simplified Licensing Support

Prior to OnBase Foundation EP5, OnBase primarily supported a conventional licensing model that consisted of individual licenses for each module in the OnBase product suite. While these legacy licenses could be bundled in certain situations, they still had to be activated within the OnBase database individually.

Beginning in OnBase Foundation EP5, OnBase supports a simplified licensing model that automatically bundles legacy product licenses into base packages of related functionalities. This simplified licensing model largely eliminates the need to activate dozens of individual licenses manually and still supports the same functionalities. In supporting these same functionalities, the simplified model also links them together in logical groups to better meet your organization's business needs.

In OnBase Foundation EP5, the base packages of related functionalities are available through the following database licenses:

Simplified License (Base Package)	Functionalities Included
<b>Essential User</b>	<ul style="list-style-type: none"> <li>• Content management</li> <li>• Capture</li> <li>• Reporting and analytics</li> <li>• Search</li> <li>• Retention and records management</li> </ul>
<b>Standard User</b>	<ul style="list-style-type: none"> <li>• All <b>Essential User</b> functionalities</li> <li>• Workflow process automation and integration tools</li> <li>• Collaboration</li> </ul>
<b>Premier User</b>	<ul style="list-style-type: none"> <li>• All <b>Essential User</b> functionalities</li> <li>• All <b>Standard User</b> functionalities</li> <li>• Advanced capabilities for creating low-code business applications</li> <li>• Case management</li> </ul>

Each base package's simplified license is a named user license that a system administrator must assign to the appropriate users or User Groups in the OnBase Configuration module to give them access to the functionalities included with that license. For more information on configuring license settings for users and User Groups, see the **System Administration** documentation.

Each base package license is consumed when the user begins their session, and the user can make up to 10 simultaneous connections through multiple clients or devices. To bypass this per-user limit, you can request the Emergency Access Client add-on license, which logs any overages for later auditing.

In addition to the base packages, the simplified licensing model includes optional add-on packages for accessing additional functionalities. However, unlike the base packages, the add-on packages do not replace any existing licenses with new database licenses. The add-on packages simply group individual licenses for related functionalities together.

## Using Enterprise Simplified Licenses

While each base package's simplified license is an individual named user license by default, you can request the enterprise version of the Essential User, Standard User, or Premier User license to unlock the base package's functionalities for all members of your organization. When using the enterprise version of a base package, you also gain access to one of the following licenses:

- Integration-Only for Essential (Simultaneous Connections)
- Integration-Only for Standard (Simultaneous Connections)
- Integration-Only for Premier (Simultaneous Connections)

The Integration-Only licenses allow concurrent user connections for integrations in the simplified licensing model, similar to how Concurrent Client licenses allow concurrent connections in the legacy licensing model.

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**Note:** When using simplified licensing for healthcare products, by default, you must use the enterprise version of the appropriate base package for core OnBase functionalities plus the appropriate add-on packages for the specific healthcare products you are using.

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## Using Simplified or Legacy Licensing

Beginning in OnBase Foundation EP5, new customers must use one or more simplified licenses to access the functionalities included in those licenses. At a minimum, this includes a base package for accessing standard OnBase functionalities. Optionally, it may also include one or more add-on packages for accessing additional functionalities. For a complete list of the legacy license functionalities included with each simplified license package, see the **OnBase Pricing Simplification Product Mapping Matrix**. For the licensing requirements of a specific product, see that product's documentation.

Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licenses to access all the functionalities they need for their solutions.

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**Note:** All products in a customer's OnBase system must be licensed through the same licensing model. If any customers must access OnBase functionalities that are only available through the legacy licensing model, these customers must use the legacy licensing model for all products in their system.

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Both new and existing customers can use any of the available license packages to access the functionalities they need for their solutions. For more information on the license packages available to you, contact your account manager.

## Operating System Requirements

### General Requirements

Transport Layer Security (TLS) 1.2 or later is required in OnBase Foundation EP5.

### Supported Desktop Operating Systems

The following table lists the desktop operating systems that are supported in OnBase Foundation EP5:

Operating System <b>X = Available/Supported</b> <b>N/A = Not Available</b>	OnBase Client	Web/ Application Server	Web Client	Unity Client
Windows 8.1	<b>X</b>	N/A	<b>X</b>	<b>X</b>
Windows Server 2012 R2	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
Windows 10	<b>X</b>	N/A	<b>X</b>	<b>X</b>
Windows Server 2016	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
Windows Server 2019	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
Windows Server 2019 Server Core	N/A	<b>X</b>	N/A	N/A
Windows Server 20H2 Server Core	N/A	<b>X</b>	N/A	N/A
Apple macOS (Version 10.9 or later version)	N/A	N/A	<b>X</b>	N/A

### Microsoft .NET Framework Requirements

OnBase requires Microsoft .NET Framework 4.7.2 or later. The .NET Framework can be obtained from the Microsoft Download Center at <http://www.microsoft.com/downloads>.

# Microsoft Visual C++ Requirements

## General C++ Requirements

The following Microsoft Visual C++ Redistributable Packages are required:

- Microsoft Visual C++ 2012 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)

If you are using a 64-bit system, the following Microsoft Visual C++ Redistributable Packages are also required:

- Microsoft Visual C++ 2012 Redistributable Package (x64)
- Microsoft Visual C++ 2019 Redistributable Package (x64)

If not already present on your system, these packages are installed when the **setup.exe** installer is used to install the OnBase Client or Configuration modules.

## Server C++ Requirements

The Web Server and both the 32-bit and 64-bit versions of the Application Server require the Microsoft Visual C++ Redistributable Packages listed below. If not already present on your server, these packages are installed when the **setup.exe** installer is used to install the OnBase Web or Application Servers.

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**Note:** If the Web Server and Application Server are not installed on the same computer as the module(s) with which they are connecting, you must ensure that the following packages are also installed on the modules' workstations.

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The 32-bit Application Server requires the following:

- Microsoft Visual C++ 2012 Redistributable Package (x86)
- Microsoft Visual C++ 2013 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)

The 64-bit Application Server requires the following:

- Microsoft Visual C++ 2012 Redistributable Package (x64)
- Microsoft Visual C++ 2019 Redistributable Package (x64)

The Web Server requires the following:

- Microsoft Visual C++ 2012 Redistributable Package (x64)
- Microsoft Visual C++ 2019 Redistributable Package (x64)

If you are using the Application Server (either 32-bit or 64-bit) in conjunction with the Unity Client on a 64-bit system, you must also ensure that all of the following are installed on the Unity Client's workstation:

- Microsoft Visual C++ 2012 Redistributable Package (x86)
- Microsoft Visual C++ 2012 Redistributable Package (x64)

- Microsoft Visual C++ 2019 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x64)

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

### Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Web Browser Requirements

### Web Client Browser Requirements

The following sections list the Web browsers explicitly supported in the Web Client in OnBase Foundation EP5. Ensure that you are using these browser versions at a minimum with the Web Client.

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**Note:** For any Web browser used with OnBase, it is recommended that you disable your Web browser's form field saving feature (sometimes referred to as AutoComplete or Autofill). If a workstation with OnBase has multiple users or handles sensitive or private data, the browser's form field saving feature could save this data and expose it to other users. For more information on disabling the form field saving feature, see your browser's documentation.

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### ActiveX Web Client

The ActiveX Web Client is supported on Microsoft Internet Explorer 11 (IE 11) running in IE 11 document mode.

## HTML Web Client (Macintosh OS)

The HTML Web Client is supported on the following browsers in macOS:

- Google Chrome 89 or greater
- Mozilla Firefox 87 or greater
- Mozilla Firefox Extended Support Release (ESR) 78 or greater
- Safari 14.0 or greater, with the exceptions of full screen mode and Safari Reader

## HTML Web Client (Windows OS)

The HTML Web Client is supported on the following browsers in Windows:

- Google Chrome 89 or greater
- Microsoft Edge on Chromium 89 or greater
- Microsoft Internet Explorer 11 (IE 11) running in IE 11 document mode
- Mozilla Firefox 87 or greater
- Mozilla Firefox Extended Support Release (ESR) 78 or greater

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**Note:** As of OnBase Foundation EP5, Microsoft EdgeHTML (Edge Legacy) is no longer supported. If you are using any version of EdgeHTML, you should not upgrade to OnBase Foundation EP5 until you have upgraded to a browser supported by OnBase.

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## Unity Client Browser Requirements

As long as you are using a supported operating system, there are no further Web browser requirements for the Unity Client.

## Server Browser Requirements

The Web Server and both the 32-bit and 64-bit versions of the Application Server are supported on Microsoft Internet Explorer 11 (IE 11) running in IE 11 document mode.

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**Note:** You must ensure that all Windows Server updates are applied.

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## OnBase Client Hardware Requirements

### Client Retrieval Workstation Hardware Requirements

Hardware	Minimum	Recommended
<b>CPU</b>	1.6 GHz, 2-core	2 GHz or faster, 2-core
<b>Memory (RAM)</b>	<ul style="list-style-type: none"> <li>• <b>32-bit OS:</b> 2 GB</li> <li>• <b>64-bit OS:</b> 4 GB</li> </ul>	4 GB or greater
<b>Free Hard Disk Space (total for installation itself and post-installation files)</b>	2 GB	2 GB or greater
<b>Screen Resolution</b>	1280 x 768	1280 x 1024 (1440 x 900 widescreen)

### OCR Processing Workstation Hardware Requirements

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

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

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## Processing Workstation Minimum Hardware Requirements

Hardware	Minimum Requirement
Memory (RAM)	A typical processing station can run on as little as 64 MB in addition to the amount of memory required to run the operating system. OS requirements vary greatly.
Free Hard Disk Space	200 MB (system files and OnBase software)
Screen Resolution	1280 x 768

## CD/DVD/Blu-ray Authoring Workstation Hardware Requirements

Hardware	Minimum	Recommended
CPU	1.6 GHz, 2-core	2 GHz or faster, 2-core
Memory (RAM)	<ul style="list-style-type: none"> <li>• <b>32-bit OS:</b> 2 GB</li> <li>• <b>64-bit OS:</b> 4 GB</li> </ul>	4 GB or greater
Free Hard Disk Space (total for installation itself and post-installation files)	<ul style="list-style-type: none"> <li>• <b>CD Authoring:</b> 3 GB</li> <li>• <b>DVD Authoring:</b> 8 GB</li> <li>• <b>Blu-ray Authoring:</b> 27 GB</li> </ul> <p><b>Note:</b> If exporting or publishing, add an additional 1 GB to the appropriate value above for the Export directory structure.</p>	
Screen Resolution	1280 x 768	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	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
Scanner	TWAIN compliant	

## Server and Core Services Hardware Requirements

### 32-Bit Server Hardware Requirements

The following requirements apply to the 32-bit Application Server only.

Server Component	Minimum	Recommended
CPU	2.4GHz dual-core / dual processor	Intel® XEON™ processor with multiple cores or processors
Memory (RAM)	4 GB  <b>Note:</b> 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.	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.

Server Component	Minimum	Recommended
<b>Network Card</b>	Gigabit Ethernet	Gigabit Ethernet or higher
<b>IIS</b>	Microsoft Internet Information Services 8.0, 8.5, or 10.0	

Web and Application Servers must be dedicated purpose servers; they must not be 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.

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**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.

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## Microsoft Internet Information Services (IIS)

Microsoft Internet Information Services (IIS) provide the ability to install the OnBase Foundation EP5 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 Server Hardware Requirements

The following requirements apply to the 64-bit Web and Application Servers only. Differences are noted where applicable.

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

Server Component	Minimum	Recommended
<b>Memory (RAM)</b>	<ul style="list-style-type: none"> <li>• <b>Web Server:</b> 4 GB</li> <li>• <b>App Server (64-bit):</b> 8 GB</li> </ul> <hr/> <b>Note:</b> Using the minimum recommended memory may have an adverse effect on performance.	<ul style="list-style-type: none"> <li>• <b>Web Server:</b> 8 GB</li> <li>• <b>App Server (64-bit):</b> 16 GB</li> </ul>
<b>Free Hard Disk Space (total for installation itself and post-installation files)</b>	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.
<b>Network Card</b>	Gigabit Ethernet	Gigabit Ethernet or higher
<b>IIS</b>	Microsoft Internet Information Services 8.0, 8.5, or 10.0	

Web or Application Servers must be dedicated purpose servers; they must not be 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.

## Hyland Full-Text Server Requirements

The Hyland Full-Text Server must be a dedicated-purpose server. It should not be used as a domain controller, DNS server, web server, application 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.

Server Component	Minimum	Recommended
<b>CPU</b>	2.4 GHz quad-core	3.2 GHz Intel® XEON™ hex-core
<b>Host Machine</b>	Physical or virtual	Physical
<b>Memory (RAM)</b> <b>Note:</b> Using the minimum recommended memory may have an adverse effect on performance.	4 GB	12 GB
<b>Free Hard Disk Space</b> <b>Note:</b> Available disk space should be at least twice the size of the largest file users may upload.	10 GB	40 GB or greater
<b>Network Card</b>	100 Mb ethernet	Gigabit ethernet or higher
<b>IIS</b>	Microsoft Internet Information Server 8.0, 8.5, or 10.0	

## Web Client Hardware Requirements

Web Client Component	Minimum	Recommended
<b>CPU</b>	1 GHz	
<b>Memory (RAM)</b>	1 GB	2 GB or greater
<b>Free Hard Disk Space</b>	<ul style="list-style-type: none"> <li>• For installing and running the <b>ActiveX Web Client</b>: 200 MB</li> <li>• For installing and running the <b>Desktop Host</b>: 400 MB</li> </ul>	
<b>Screen Resolution</b>	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
<b>Email Platform</b>	MAPI 1.1 Compliant Email Client connection and supporting Active Messaging DLLs	

## Unity Client Platform Hardware Requirements

Component	Minimum	Recommended
<b>CPU</b>	1.6 GHz, 2-core	2.4 GHz or faster, 2-core
<b>Memory (RAM)</b>	2 GB	4 GB
<b>Free Hard Disk Space (for installing and running the Unity Client)</b>	800 MB	
<b>Screen Resolution</b>	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
<b>Graphics Card</b>	128 MB	256 MB with hardware acceleration support
<b>Email Platform</b>	Lotus Notes 8.5.x IBM Notes 9.0.x Microsoft Outlook 2019 Novell GroupWise 2012 or 2014 Gmail (using Google Services Integration)	
<b>Media Player</b>	Windows Media Player 10	

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**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.

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## Unity Client Scanning Workstation Hardware Requirements

Hardware	Minimum	Recommended
<b>CPU</b>	1.6 GHz, 2-core	2.4 GHz or faster, 2-core
<b>Memory (RAM)</b>	4 GB	6 GB
<b>Free Hard Disk Space (total for installation itself and post-installation files)</b>	2 GB	2 GB or greater

Hardware	Minimum	Recommended
Screen Resolution	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
Scanner	TWAIN compliant	

## 64-Bit Studio Hardware Requirements

The following requirements apply to the 64-bit OnBase Studio only.

For the 32-bit OnBase Studio hardware requirements, see the Unity Client hardware requirements.

Component	Minimum	Recommended
CPU	1.6 GHz, 2-core	2.4 GHz or faster, 2-core
Memory (RAM)	4 GB	8 GB
Free Hard Disk Space (for installing and running the Unity Client)	2 GB	
Screen Resolution	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
Graphics Card	128 MB	256 MB with hardware acceleration support
Email Platform	Lotus Notes 8.5.x IBM Notes 9.0.x Microsoft Outlook 2019 Novell GroupWise 2012 or 2014 Gmail (using Google Services Integration)	
Media Player	Windows Media Player 10	

## Miscellaneous Requirements

### Unity Scheduler Service

Beginning in OnBase 18, 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 Service from a previous version must also be upgraded to version 18 or later.

For more information on installing and configuring the Unity Scheduler Service, see the **Unity Scheduler** module reference guide.

### 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://community.hyland.com/technical/third-party-compatibility/third-party-compatibility-list>

### 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 Hyland Community (<https://community.hyland.com>).

## 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.

## 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 Internet Explorer from a Remote Desktop Server.

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

## Modifying Configuration Files

When UAC is enabled, administrators may be unable to modify Web.config or other \*.config files. To address this issue, the administrator should open a text editor (such as Notepad) by right-clicking it and selecting **Run as administrator**. The administrator can then open the \*.config file from within the text editor. Because the text editor is running with administrator privileges, the configuration file can be modified and saved using that application.

## Data Execution Prevention (DEP)

Data Execution Prevention, or DEP, is a Windows feature that prevents execution of code from places where it should not be executed. Two kinds of DEP may be present on any system running any modern Windows client or server operating system: DEP software and hardware-based DEP. Each type of DEP prevents a different type of undesired code execution. By default, DEP software is contained in all modern Windows client and server operating systems. Hardware-based DEP, or computer-hardware enforced protection, requires a processor that will support hardware-based DEP. Processors that support hardware-based DEP do so through a set of instructions on the processor that implement the hardware protection. Hardware-based DEP is only used in Windows when such a processor is present.

If there is an issue with OnBase as a result of DEP, make sure an exception for OnBase has been created in your DEP settings.

### Determining DEP Settings

The following instructions will help you determine whether DEP settings need to be adjusted on your system:

1. Log on to your operating system with administrator rights.
2. Open the Control Panel and select **System**. The **System** window is displayed.
3. Click **Advanced system settings** in the sidebar. The **System Properties** dialog box is displayed.
4. Select the **Advanced** tab.
5. Select the **Settings** button in the **Performance** section. The **Performance Options** dialog box is displayed.
6. Select the **Data Execution Prevention** tab.

When configuring DEP, two options are present to choose from: **Turn on DEP for essential Windows programs and services only** and **Turn on DEP for all programs and services except those I select**. The first option is selected by default for Windows client operating systems. The second option is selected by default for Windows server operating systems. When DEP is only turned on for essential Windows programs and services, OnBase will perform normally. However, when **Turn on DEP for all programs and services except those I select** has been chosen, and hardware-based DEP is enabled, exceptions need to be configured to exempt OnBase from DEP.

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**Note:** Text at the bottom of the **Data Execution Prevention** tab will indicate whether hardware-based DEP is supported on your system.

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## Configuring Exceptions to DEP Settings

To configure exceptions to DEP settings:

1. In the **Data Execution Prevention** tab, the **Turn on DEP for all programs and services except those I select** option should be already selected.

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**Caution:** Do NOT select this option if it is not already selected. Selecting this option enables a higher DEP security level, which could potentially cause issues with other applications on your system.

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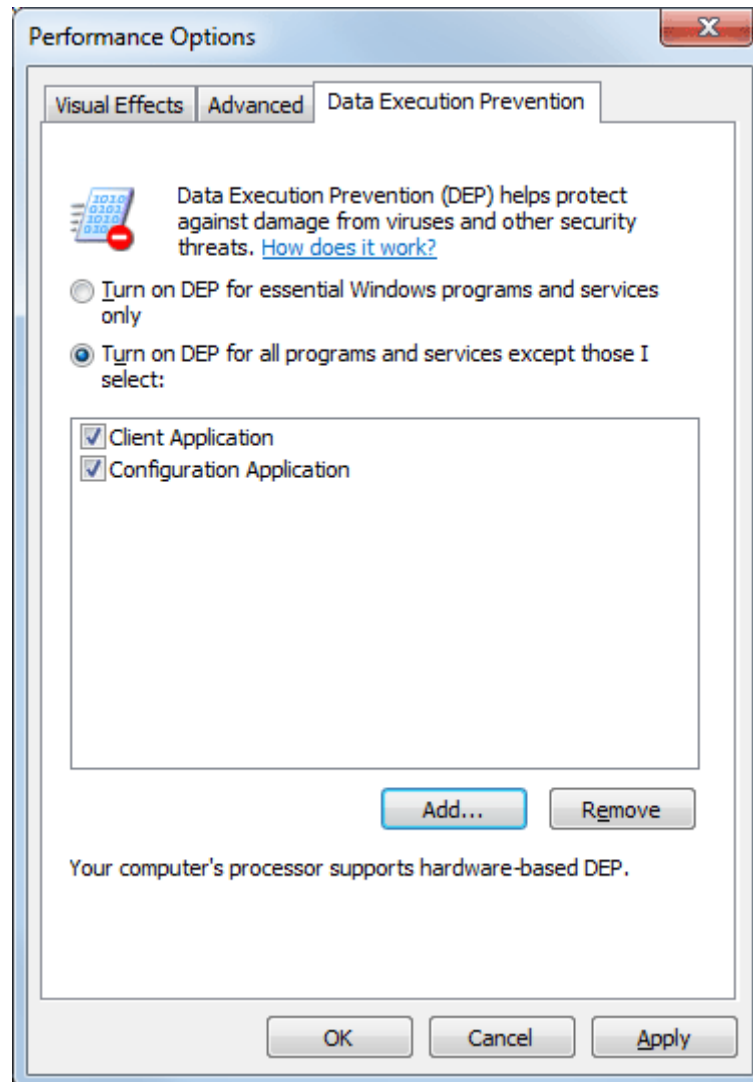
2. Click **Add...**
3. Browse out to the location of your OnBase Configuration and/or Client executable files. Click **Open**.

---

**Note:** The location of the executables must be full paths.

---

4. Selected applications will display in the exceptions list.



If you continue to experience problems, consult your service provider.

## Overview

The following sections outline requirements information specific to ACH Generator in OnBase Foundation EP5. For general requirements information that applies to both ACH Generator and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for ACH Generator:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Additional Requirements Considerations

See [Data Execution Prevention \(DEP\) on page 25](#).

## Overview

The following sections outline requirements information specific to Advanced Capture in OnBase Foundation EP5. For general requirements information that applies to both Advanced Capture and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Advanced Capture:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [OCR Processing Workstation Hardware Requirements on page 13](#).

## Overview

The following sections outline requirements information specific to Agenda in OnBase Foundation EP5. For general requirements information that applies to both Agenda and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Agenda:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [32-Bit Server Hardware Requirements on page 17](#) for more information.

## Agenda 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
Free Hard Disk Space (for installing and running the Unity Client)	450 MB	

Component	Minimum	Recommended
<b>Screen Resolution</b>	1024 x 768 (1280 x 800) <b>Note:</b> Using a lower resolution may result in a loss of functionality.	1280 x 1024 (1440 x 900 widescreen)
<b>Graphics Card</b>	128 MB	256 MB with hardware acceleration support
<b>Web Browser</b>	Microsoft Internet Explorer 11.0	Because some versions of Internet Explorer are not supported on all operating systems supported by OnBase, Windows 8.1: IE 11 is recommended.
<b>Email Platform</b>	Lotus Notes 8.0.2 or 8.5 IBM Notes 9 Microsoft Outlook 2013 Novell GroupWise 8 or 12 <b>Note:</b> When sending messages with Novell GroupWise, Plain Text is the only format available.	
<b>Media Player</b>	Windows Media Player 10	

## Agenda Online Web Site Hardware and Browser Requirements

To run the Agenda Online public-facing Web site, a user's workstation must meet the following requirements:

Agenda Online Component	Minimum	Recommended
<b>CPU</b>	1 GHz	
<b>Memory (RAM)</b>	1 GB	2 GB or greater
<b>Free Hard Disk Space</b>	200 MB	



Agenda Online Component	Minimum	Recommended
<b>Screen Resolution</b>	1024 x 768 (1280 x 800) <hr/> <b>Note:</b> Using a lower resolution may result in a loss of functionality. <hr/>	1920 x 1080
<b>Web Browser</b>	<ul style="list-style-type: none"> <li>• Edge 92</li> <li>• Firefox® 91</li> </ul> <hr/> <b>Note:</b> The JWPlayer is not supported in the Android version of Firefox. <hr/> <ul style="list-style-type: none"> <li>• Chrome 92</li> <li>• Safari 14.1.1</li> </ul> <hr/> <b>Note:</b> Earlier versions of each browser may work, but are not officially supported. If issues arise, upgrade your browser as a first troubleshooting step. <hr/> Microsoft ASP.NET MVC 4 is required for Agenda Online to function.	

## Overview

The following sections outline requirements information specific to Agenda Media in OnBase Foundation EP5. For general requirements information that applies to both Agenda Media and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Agenda Media:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Media Publisher Hardware Requirements

The following table lists the requirements to run Agenda Media:

Agenda Online Component	Minimum
CPU	Dual quad-core or a single hex-core, 3.00 GHz or better
Network	1Gbps Ethernet
Memory (RAM)	8 GB
Disk	<ul style="list-style-type: none"> <li>• Redundant disk configuration</li> <li>• 100 MB free for installation</li> <li>• Sufficient space for recording to disk.</li> </ul>

---

**Note:** Ensure that the hardware on which the media is stored uses SSD hard drives. This optimizes the write speed during the recording of media.

---

## Media Storage Requirements

OnBase Disk Groups provide long term storage for media files. Media files may be measured in gigabyte sizes. As the stream bit rate increases, the physical storage requirements also increase. For example, board and council meetings can run up to 8 or more hours, with file sizes ranging from 500MB to between 1 - 10 Gigabytes.

---

**Note:** If your OnBase database was installed and configured with a version of OnBase prior to version 13, you may not have support for storing files larger than 2GB. With version 13, OnBase implemented support of 64-bit database integer values for tracking of file sizes greater than 2GB. Please contact your first line of support to determine if your OnBase database will support large file storage.

---

The following table provides estimated calculations of file sizes based on the length and quality of the video.

Average Bitrate kb/Sec	Video Bitrate kb/Sec	Audio Bitrate kb/Sec	Average Bitrate MB/Sec	File Size GB/Hour	Hard Drive Hours/TB
500	404	96	0.06	0.21	4,772
1000	872	128	0.12	0.43	2,386

## Overview

The following sections outline requirements information specific to Agenda Voting in OnBase Foundation EP5. For general requirements information that applies to both Agenda Voting and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Agenda Voting:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

For more information on Web Browser requirements for Agenda Voting, see [Web Browser Requirements on page 13](#).

## Overview

The following sections outline requirements information specific to AFP Input Filter in OnBase Foundation EP5. For general requirements information that applies to both AFP Input Filter and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for AFP Input Filter:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for AFP Input Filter:

- If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).
- If you are using AFP Input Filter with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to Application Enabler in OnBase Foundation EP5. For general requirements information that applies to both Application Enabler and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Application Enabler:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Application Enabler:

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for information on Unity Client web browser requirements.

## Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#) for information on Unity Client hardware requirements.

## Application Enabler User Account Control Statement

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.

## Load Balancing

This module supports load balancing across multiple Web Servers and Application Servers. Load balancers must support either IP-based or cookie-based load balancing (also referred to as layer-3, layer-4, and layer-7 load balancing). Load balancers also must be configured to use persistent session (or sticky session) load balancing. For information about configuring your load balancer, refer to its documentation. For information about configuring OnBase modules for load balancing, refer to the Web Server module reference guide.

In Application Enabler, the following contexts are supported only with IP-based load balancing:

- AE - FolderPop
- Application Enabler - Retrieve Deficiencies
- Application Enabler - Patient Window

Other Application Enabler contexts are supported with both cookie-based and IP-based load balancing.

## Application Enabler and Data Execution Prevention (DEP)

Data Execution Prevention, or DEP, is a Windows feature that prevents execution of code from places where it should not be executed. DEP is a feature of Windows operating systems that was introduced with Windows Server 2003 SP1 and Windows XP SP2.

When DEP is enabled, add the **AEConfig.exe** and **Obunity.exe** files to the DEP Whitelist in order to create the font database necessary to use Application Enabler's OCR functionality. If you are using Application Enabler's OCR functionality, disable DEP or configure DEP with the **Turn on DEP for all programs and services except those I select** radio button selected. Add the **AEConfig.exe** and **Obunity.exe** files to the subsequent list.

## Line-of-Business Application Requirements

Application Enabler should be run under the same Windows user account as the line-of-business application. When Application Enabler and the line-of-business application are running under two different Windows user accounts, Application Enabler will not function.

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**Note:** Application Enabler OCR functionality cannot be used when **ClearType** is selected from the **Use the following method to smooth edges of screen fonts** drop-down list in Windows display settings. For this reason, whenever you use Application Enabler OCR functionality, Application Enabler automatically disables this setting. Application Enabler does not re-enable this setting. For information on enabling this setting, see the Windows help files.

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### Windows Applications

- Applications must use ActiveX® Edit controls that communicate to the Windows API.
- Controls must be active.
- Applications must use the Windows API.

### Text-Based Applications

- Applications must use standard copy-to-clipboard functionality.
- Keyword Values must always be in the same position on the screen.
- Applications must use the Windows API.

### HTML-Based Applications

- HTML Applications must use HTML code.
- The data must be in either a tag - value pair or in a non-nested table format.
- Hidden values can be seen as long as they adhere to the above requirements.
- Values can not be generated by most scripts or applets.
- The application must be running in a web browser supported by OnBase.

To enable applications using the Firefox or Opera browsers, configure the application as a Smart-Screen application. Other web browsers can only be used if Silverlight or WPF applications are embedded inside of the host browser. To enable these types of applications, configure the application as a Smart-Screen application. For more information on Smart-Screen configuration, see the section on enabling Smart-Screen applications in the **Application Enabler** module reference guide.

### Java-Based Applications

In order to enable Java-based applications, Java Access Bridge and Java Virtual Machine must be installed. These two must be compatible with each other. Consult Oracle's compatibility documentation for more information.



The following versions of Java Access Bridge are supported:

Java Access Bridge Version	Important Notes
<b>1.0.2</b>	
<b>1.2</b>	
<b>2.0.1</b>	Java Access Bridge 2.0.1 is recommended for any client machines (32-bit only) on which the Java application is running under Java Runtime Engine 1.5 or earlier. The compatibility for Java Access Bridge 2.0.1 is available at: <a href="http://www.oracle.com/technetwork/java/javase/documentation/compatibility-137109.html">http://www.oracle.com/technetwork/java/javase/documentation/compatibility-137109.html</a>
<b>2.0.2</b>	Java Access Bridge 2.0.2 is required on any 64-bit client machines. It only supports Java Runtime Engine 1.5, 1.6, and 1.7.
<b>2.0.3</b>	Java Access Bridge 2.0.3 is included with Java Runtime Engine 1.7u6 (JRE 7u6) and later. By default, Java Access Bridge is not enabled. To enable Java Access Bridge in this situation, refer to Oracle's instructions available at: <a href="http://docs.oracle.com/javase/7/docs/technotes/guides/access/enable_and_test.html">http://docs.oracle.com/javase/7/docs/technotes/guides/access/enable_and_test.html</a>
<b>2.0.4</b>	Java Access Bridge 2.0.4 is included with Java Runtime Engine 1.8u11 (JRE 8u11) and later. By default, Java Access Bridge is not enabled. To enable Java Access Bridge in this situation, refer to Oracle's instructions available at: <a href="http://docs.oracle.com/javase/8/docs/technotes/guides/access/enable_and_test.html">http://docs.oracle.com/javase/8/docs/technotes/guides/access/enable_and_test.html</a>

The following Java Virtual Machine versions are supported: JDK 1.1.8 and higher.

## Dynamics GP Applications

- Dynamics GP 9.0 or greater must be installed.

## Overview

The following sections outline requirements information specific to the Application Server in OnBase Foundation EP5. For general requirements information that applies to both the Application Server and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

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**Note:** Unless otherwise noted, the following requirements apply to both the 32-bit and 64-bit versions of the Application Server.

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## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for the Application Server:

- For information on supported server operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for the Application Server:

- For 32-bit Application Server hardware requirements, see [32-Bit Server Hardware Requirements on page 17](#).
- For 64-bit Application Server hardware requirements, see [64-Bit Server Hardware Requirements on page 18](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for the Application Server:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)
- [Windows User Account Control Statement on page 24](#)

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

### Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Notes on Dedicated Server Hardware

Hyland Software specifies that OnBase Web and Applications Servers be installed on server machines that are dedicated to that sole purpose. We do not support Application Server installations that place other applications, servers, or services on the same physical device.

Web and Application Servers must be dedicated purpose servers; they must not be 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.

The OnBase Application Server, combined with the OnBase Web Server, delivers both static and dynamic content utilizing Microsoft Internet Information Services and Microsoft ASP.NET technology. When both the OnBase Web Server and the OnBase Application Server reside on the same Microsoft Windows Server, high utilization may be seen during peak times. Retrieving search results lists in XML, rendering document images, executing text searches, and various retrieval-related queries place great demand on the Windows Server's hardware, especially the CPU(s) and I/O systems. The server is further loaded down when Microsoft IIS itself is required to perform HTTPS connection services on all content being served to attached browsers through HTTPS connections.

Workflow timers and OnBase processing, both manual and scheduled, should be run on separate servers or workstations. Due to the nature of IIS and how the Web Server utilizes memory, running these processes on the same machine can consume memory, bandwidth, and CPU resources at critical times when users or customers may be accessing the server. The risk of restarting IIS or rebooting the machine must also be kept to a minimum because either of these actions will cause connected users to lose their sessions and possibly lead to data loss.

With all these processing-intensive demands, it is imperative that dedicated server hardware be deployed for each OnBase installation. This will maximize performance, reliability, and maintainability.

## Notes on Unicode Support

While multiple groups of languages (i.e., as defined by Windows code pages) can be accessed in a single Unicode database, only one group of languages is supported on a single Application Server.

# ARCHIVE SERVICES FOR MICROSOFT SHAREPOINT

## Overview

The following sections outline requirements information specific to Archive Services for Microsoft SharePoint in OnBase Foundation EP5. For general requirements information that applies to both Archive Services for Microsoft SharePoint and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Archive Services for Microsoft SharePoint:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Archive Services for Microsoft SharePoint:

- For information on the supported desktop operating systems, see the **Web/ Application Server** table column and the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

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**Note:** The required version of .NET must be installed on the SharePoint server.

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- For information on the Microsoft Visual C++ requirements for the Web Server, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the web browser requirements for Archive Services for Microsoft SharePoint:

- For information on Web Client browser requirements, see [Web Client Browser Requirements on page 13](#).
- For information on Web Server browser requirements, see [Server Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Archive Services for Microsoft SharePoint:

- For information on 64-bit hardware requirements, see [64-Bit Server Hardware Requirements on page 18](#).
- For information on Web Client hardware requirements, see [Web Client Hardware Requirements on page 20](#).

## Third-Party Requirements

To use Archive Services for Microsoft SharePoint, you must have one of the following:

- Microsoft SharePoint Foundation 2013
- Microsoft SharePoint Server 2013
- Microsoft SharePoint Server 2016

## Overview

The following sections outline requirements information specific to the various methods used for authentication with OnBase Foundation EP5. For requirements information that applies to OnBase in general and other modules, see [General Requirements Considerations on page 1](#).

## Active Directory and LDAP Authentication

The following additional requirements must be met when using Active Directory and LDAP authentication.

### Extended Character Sets

Certain characters in some locales are not stored correctly in an ANSI database and can prevent user logins if the user account names or passwords contain the unsupported characters.

In order to use Active Directory or LDAP authentication in OnBase environments that include any workstations set to a locale that uses an extended character set (for example, the dotted capital I and dotless lower case I in Turkish and Azeri locales), the OnBase database should be a Unicode collation.

### LDAP Directory Service

For LDAP authentication, the directory service software must be compatible with LDAP version 3.

## Active Directory Federation Services (AD FS)

The following certificates are used by OnBase or AD FS to complete authentication. Make sure you have the required certificates before attempting configuration.

- **AD FS SSL:** The SSL certificate used by IIS on the AD FS server to encrypt traffic. It is required. The private key resides on the AD FS server, and the OnBase Web Server and the client machine must trust the issuer (ROOT CA) of the certificate.
- **Token Encryption:** The certificate used by AD FS to encrypt the token sent to the client. It is not required but it is recommended.
- **Token Signing:** The certificate used by AD FS to sign SAML tokens. It is required. The public key resides on the OnBase Web Server.

- **Request Signing:** The certificate used by OnBase to sign the request sent to the AD FS server. It is not required but it is recommended.
- **Web Server SSL:** The SSL certificate used by IIS on the OnBase Web Server to encrypt traffic. It is required. The private key resides on the OnBase Web Server, and the AD FS server and the client machine must trust the issuer (ROOT CA) of the certificate.

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**Note:** OnBase using AD FS authentication does not support CNG (Cryptographic Next Generation) certificates.

---

All certificates should be in the local computer account. If the OnBase Application Server is on a different machine from the OnBase Web Server, the certificates on both servers must match.

All private keys should be stored in the **Local Computer\Personal** certificate store. Private keys in that store should have a matching public key stored in either the **Local Computer\Trusted Root Certification Authorities** or **Local Computer\Trusted People** certificate stores. All other public keys should be stored in the **Local Computer\Trusted People** certificate store.

The Application Pool Identity account or impersonation account configured for the servers requires **Read** access to the certificates.

Certificate thumbprints are used to correctly identify the certificate to use for communication. The thumbprint value can be found in the certificate manager.

## Integration for Single Sign-On

The OnBase Entrust Single Sign-On provider targets Microsoft .NET Framework version 3.5. This may be different from the .NET requirements of other areas of your overall OnBase solution.

## Single Sign-On for PeopleSoft Enterprise

The following additional requirements must be met to configure and use Single Sign-On for PeopleSoft Enterprise:

- PeopleTools version **8.48** or higher.
- The **PRTL\_SS\_CI** PeopleSoft API component interface.
- The OnBase **Integration for Single Sign-On** must be installed on the OnBase web server.

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**Note:** In order for an OnBase user to be automatically logged in to OnBase using single sign-on when OnBase is accessed through a PeopleSoft page, that user's OnBase user name must match exactly that user's PeopleSoft user ID. The user's passwords do not have to match.

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## Overview

The following sections outline requirements information specific to Authoring, Export, and Publishing in OnBase Foundation EP5. For general requirements information that applies to both Authoring, Export, and Publishing and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

### Export/Publishing Transfer Databases Supported

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**Note:** Export jobs require equivalent storage capacities for the OnBase and transfer databases. For instance, an OnBase database that supports 64-bit integer fields can only export to a transfer database that also supports 64-bit integer fields; it cannot export to a transfer database that only supports 32-bit integer fields.

---

The following transfer databases are supported for export/publishing jobs.

- Microsoft SQL Server 2012 Express Edition

### Unicode Transfer Databases Supported

Only Microsoft SQL Server 2012 Express Edition is supported for a Unicode system.

## Operating System Requirements

See the following sections for more information on operating system requirements for Authoring, Export, and Publishing:

- For information on supported server operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

# Hardware Requirements

See [CD/DVD/Blu-ray Authoring Workstation Hardware Requirements](#) on page 14.

## CD, DVD, and Blu-ray Requirements

A CD, DVD, or Blu-ray (BD-R) writer is required for the workstation performing the disc writing, along with the PX (Primo) SDK package from Sonic Solutions, which is included with this module or is available from your first line of support.

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**Note:** Blu-ray writing requires PX (Primo) SDK package version **4.16.15.0** or greater, available from your first line of support. The **BD-R Media** option is not available in **CD Setup** if the PX (Primo) SDK package installed is not a compatible version.

---

OnBase supports disc drives that support the Sonic Record Engine (PX Engine) software by Sonic Solutions.

The PX Engine includes Sonic's SilentSelect technology, which allows it to support new disc drives without requiring an updated driver or software release from Sonic Solutions. With SilentSelect technology most modern disc drives should be supported, but all devices should be tested before including them as part of your overall solution.

## Rimage PC for Automated Jobs

If you are performing automated jobs, a Rimage Unit is required for the authoring workstation, along with the Rimage writing software. The PC that Rimage is installed onto can be either of the following, depending on the anticipated workload:

- Low-End PC – for normal production volumes
- High-End PC – for high-volume production

## Overview

The following sections outline requirements information specific to AutoFill Keyword Sets in OnBase Foundation EP5. For general requirements information that applies to both AutoFill Keyword Sets and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for AutoFill Keyword Sets:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for AutoFill Keyword Sets:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for AutoFill Keyword Sets:

- If you are using AutoFill Keyword Sets with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to Automated Redaction in OnBase Foundation EP5. For general requirements information that applies to both Automated Redaction and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Automated Redaction:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [OCR Processing Workstation Hardware Requirements on page 13](#).

## Overview

The following sections outline requirements information specific to the Bar Code Generator in OnBase Foundation EP5. For general requirements information that applies to both the Bar Code Generator and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Bar Code Generator:

- For information on the supported desktop operating systems, see the **Web/ Application Server** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Hardware Requirements

See [Web Client Hardware Requirements on page 20](#).

## Overview

The following sections outline requirements information specific to Bar Code Processing in OnBase Foundation EP5. For general requirements information that applies to both Bar Code Processing and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Bar Code Processing:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using to perform bar code processing (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Microsoft .NET Framework Requirements

OnBase requires Microsoft .NET Framework 4.7.2 or later. The .NET Framework can be obtained from the Microsoft Download Center at <http://www.microsoft.com/downloads>.

When processing bar codes via the Bar Code Recognition Server, .NET Framework 2.x is also required.

## Hardware Requirements

See [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Additional Processing Requirements

To use Bar Code Processing, you must have one of the following:

- The Hyland Bar Code Recognition software.
- Kofax Image controls or Kofax Software Virtual ReScan (SVRS) with the Adrenaline Image Processing Engine (AIPE).
  - **Adrenaline Software.** The Adrenaline Image Processing Engine software can be purchased separately (without the purchase of a Kofax SCSI board). When software performs the image processing, processing speeds are slower than those performed by Kofax hardware.
  - **Kofax Adrenaline 650i, 850, or 1700 accelerator board.** If using hardware, the SCSI card performs image processing, resulting in faster image processing. The Adrenaline Capture Engine software is delivered with your Adrenaline accelerator board.
- A Fujitsu PaperStream IP-compliant scanner with associated drivers.

## Overview

The following sections outline requirements information specific to Branch Capture Check Processor (Branch Capture) in OnBase Foundation EP5. For general requirements information that applies to both Branch Capture and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Branch Capture:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Microsoft Visual C++ Requirements

One or more versions of the Microsoft Visual C++ Redistributable Package are required. If not already present on your system, the required packages are installed when the **setup.exe** installer is used to install this module.

Workstations running Branch Capture require the following:

- Microsoft Visual C++ 2008 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)



## Hardware Requirements

See the following sections for more information on the hardware requirements for Branch Capture:

- For information on the hardware requirements for retrieving documents in the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- For information on the hardware requirements for Branch Capture processing, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to Business Activity Monitoring in OnBase Foundation EP5. For general requirements information that applies to both Business Activity Monitoring and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Prerequisites

Business Activity Monitoring requires the following components:

- Core Services and a functioning Web Server
- StatusView
- Workflow

# BUSINESS INDEXING CONNECTOR FOR USE WITH SAP ARCHIVELINK

## Overview

The following sections outline requirements information specific to Business Indexing Connector for use with SAP ArchiveLink in OnBase Foundation EP5. For general requirements information that applies to both Business Indexing Connector for use with SAP ArchiveLink and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Business Indexing Connector for use with SAP ArchiveLink:

- For information on the supported databases, see [Databases Supported on page 7](#).
- For information about connection strings, see [ADO.NET Connection Strings on page 6](#).
- For information about file server and database servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Business Indexing Connector for use with SAP ArchiveLink:

- For information on general operating system requirements, see [General Requirements on page 11](#).
- For information on Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Business Indexing Connector for use with SAP ArchiveLink:

- For information on client hardware requirements, see [OnBase Client Hardware Requirements on page 15](#).
- For information on server hardware requirements, see [Server and Core Services Hardware Requirements on page 17](#).

## ArchiveLink Server Requirements

The ArchiveLink Server must meet the following requirements

Component	Minimum Requirements
<b>HTTP Web Server</b>	Microsoft IIS 6.0 / 7.0.
<b>Operating System</b>	The ArchiveLink Server is supported on any operating system supported for the OnBase Foundation EP5 Web Server. See the <b>Server Supported Operating Systems</b> section for more information on supported operating systems.
<b>CPU</b>	Dual Intel Xeon processor at 2.8 GHz or faster. Maximum CPU speed.
<b>System Memory</b>	2 GB minimum, 4 GB recommended
<b>Database Versions</b>	The ArchiveLink Server is supported on any database version supported for OnBase Foundation EP5. See the <b>Databases Supported</b> section for more information on supported databases.
<b>Dependencies</b>	<ul style="list-style-type: none"> <li>• Microsoft Visual C++ 2012 Redistributable Pack x64</li> <li>• Microsoft Visual C++ 2015 Redistributable Pack x86</li> <li>• Microsoft Visual C++ 2015 Redistributable Pack x64</li> <li>• Microsoft Visual C++ 2019 Redistributable Pack x64</li> </ul>

---

**Note:** This module is not supported for use with an Informix or DB2 database.

---

## Third-Party Software Requirements

When using Business Indexing Connector for use with SAP ArchiveLink with SAP 4.6c-4.7, the Business Connector is required. When using 5.0 and above, the Business Connector is not required.

## Overview

The following sections outline requirements information specific to Business Rules Engine in OnBase Foundation EP5. For general requirements information that applies to both Business Rules Engine and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Prerequisites

The following components must be installed prior to installing Business Rules Engine:

- Core API
- Web Server
- Web Services interface for OnBase Client

## Overview

The following sections outline requirements information specific to CAD Services in OnBase Foundation EP5. For general requirements information that applies to both CAD Services and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for CAD Services:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

---

**Note:** Additional Microsoft Visual C++ requirements apply for the CAD Document Viewer and for the Integration with AutoCAD. See [Microsoft Visual C++ Redistributable Package Requirements on page 62](#) for more information.

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## Web Browser Requirements

See the following sections for more information on the Web browser requirements for CAD Services:

- If you are using CAD Services with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using CAD Services with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for CAD Services:

- If you are using CAD Services with the OnBase Client, see [OnBase Client Hardware Requirements on page 15](#).
- If you are using CAD Services with the Web Client, Unity Client, or both, see [Server and Core Services Hardware Requirements on page 17](#).

## Microsoft Visual C++ Redistributable Package Requirements

In addition to the general Microsoft Visual C++ Redistributable Package requirements for OnBase, additional Microsoft Visual C++ Redistributable Package requirements apply for the CAD Document Viewer and the Integration for AutoCAD.

### CAD Document Viewer

The Microsoft Visual C++ 2012 Redistributable Package is required to use the CAD Document Viewer.

The Microsoft Visual C++ 2012 Redistributable Package is available from Microsoft and must be downloaded and installed separately.

### Integration for AutoCAD

The 32-bit version of the Integration for AutoCAD requires the Microsoft Visual C++ 2019 Redistributable Package (x86).

The 64-bit version of the Integration for AutoCAD requires the Microsoft Visual C++ 2019 Redistributable Package (x64).

The Microsoft Visual C++ 2019 Redistributable Packages are available from Microsoft and must be downloaded and installed separately.

## Overview

The following sections outline requirements information specific to Certificate-based Software Licensing in OnBase Foundation EP5. For general requirements information that applies to both Certificate Licensing and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for Certificate Licensing:

- For information on supported client operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for Certificate Licensing:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)
- [Windows User Account Control Statement on page 24](#)
- [Data Execution Prevention \(DEP\) on page 25](#)



## Overview

The following sections outline requirements information specific to Check 21 in OnBase Foundation EP5. For general requirements information that applies to both Check 21 and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Check 21:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to Check Import Processor in OnBase Foundation EP5. For general requirements information that applies to both Check Import Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Check Import Processor:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to the OnBase Client in OnBase Foundation EP5. For general requirements information that applies to both the OnBase Client and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for the OnBase Client:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the OnBase Client:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Hardware Requirements

For more information on the hardware requirements for the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Third-Party Software Requirements

If you are using encrypted disk groups in a Windows 10 environment and have Microsoft Edge configured as your default PDF viewer, you must install the Adobe Acrobat Reader DC to properly access PDF files stored on the encrypted disk group through the OnBase Client.

## Overview

The following sections outline requirements information specific to Client and Configuration Installers in OnBase Foundation EP5. For general requirements information that applies to both Client and Configuration Installers and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Client and Configuration Installers:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Client and Configuration Installers:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Client and Configuration Installers:

- [Client Retrieval Workstation Hardware Requirements on page 15](#).
- If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

# Miscellaneous Requirements

## Authenticode Signature Verification

The OnBase Client and Configuration modules each require an additional configuration file to complete a successful installation: **obclnt32.exe.config** and **obcfg32.exe.config**, for use with the OnBase Client and Configuration module, respectively. These files are necessary under the .NET Framework to enable or disable a check of the Authenticode signatures applied to the OnBase executables. Authenticode is a Microsoft technology that uses digital certificates to identify the publisher of an application to ensure the application's integrity and to verify that the software has not been infected by any malware since it was created.

These files are located in the same directory as the OnBase Client and Configuration module executables and are installed automatically by the Client Installer. Signature verification is disabled by default for both executables. For more information on this topic, see: <http://support.microsoft.com/kb/936707>.

---

**Note:** If you are running the OnBase Client or Configuration module via a UNC connection, and trust is set to verify by publisher, then Authenticode signature verification must be enabled. If trust is set to verify by UNC path, signature verification does not have to be enabled.

---

## Enabling Authenticode Signature Verification

Locate the **obclnt32.exe.config** file for the OnBase Client or the **obcfg32.exe.config** file for the Configuration module. To enable signature verification:

1. Open the file for editing in a plain-text editor, such as Notepad.
2. Locate the **generatePublisherEvidence** element.
3. Change the **enabled** attribute to **true**:  
`<generatePublisherEvidence enabled="true"/>`
4. Save and close the file.

---

**Note:** If the machine running the executables does not have Internet access, or the speed of the network to which it is connected is slow, it could take a noticeably long time to perform this check, causing the application to take longer to launch.

---

## Disabling Authenticode Signature Verification

Locate the **obclnt32.exe.config** file for the OnBase Client or the **obcfg32.exe.config** file for the Configuration module. To disable signature verification:

1. Open the file for editing in a plain-text editor, such as Notepad.
2. Locate the **generatePublisherEvidence** element.

3. Change the **enabled** attribute to **false**:  
`<generatePublisherEvidence enabled="false"/>`
4. Save and close the file.

## Overview

The following sections outline requirements information specific to the Client Connector for Deltek Costpoint in OnBase Foundation EP5. For general requirements information that applies to both the Client Connector for Deltek Costpoint and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Costpoint Versions Supported

Client Connector for Deltek Costpoint is supported for integration with the following versions of Costpoint:

- Costpoint 7
- Costpoint 7.1



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**Note:** Although the licensed name of the product is COLD/ERM, in this manual and the software it is referred to as COLD.

---

## Overview

The following sections outline requirements information specific to COLD in OnBase Foundation EP5. For general requirements information that applies to both COLD and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for COLD:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to Collaboration in OnBase Foundation EP5. For general requirements information that applies to both Collaboration and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Collaboration:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Collaboration:

- For more information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements for the OnBase Client, see [General C++ Requirements on page 12](#).
- For information on the Microsoft Visual C++ requirements for the Web and Application Servers, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See [Web Client Browser Requirements on page 13](#).

## Hardware Requirements

See [Web Client Hardware Requirements on page 20](#).

## Installing ActiveX Controls

When ActiveX controls are deployed through the Web browser on a system with UAC enabled, the user is prompted to install each control asking **Do you want to allow the following program to make changes to this computer?**

The prompt is displayed the first time each ActiveX control is needed. Users who are logged on as administrators can click **Yes** to install the specified ActiveX control. Once the control is installed, the user is not prompted again for that control.

If the user is logged on as a standard user rather than an administrator, then an administrator must provide his or her credentials before the control can be installed. To avoid this scenario, deploy the Web ActiveX controls using the Hyland Web ActiveX Controls installer.

## Email Notifications

Ensure that all users receiving notifications have an email address configured in the Configuration module.

To configure an email address for a user:

1. Select **Users | User Names / Passwords**. The **User Names & Passwords** dialog box is displayed.
2. Select the user and click **Settings**.
3. In the **User's Email** field, enter the user's email address.
4. Click **Save**.
5. Click **Close** to exit the **User Names & Passwords** dialog box.

## Overview

The following sections outline requirements information specific to the Combined Viewer in OnBase Foundation EP5. For general requirements information that applies to both the Combined Viewer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for COLD:

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Version Requirements

The Unity Combined Viewer is available only for OnBase versions 18.0.0.31 and later. Any versions of Unity prior to this do not have access to the Unity Combined Viewer.

## Overview

The following sections outline requirements information specific to Connector for use with SAP ArchiveLink in OnBase Foundation EP5. For general requirements information that applies to both Connector for use with SAP ArchiveLink and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Connector for use with SAP ArchiveLink:

- For information on the supported databases, see [Databases Supported on page 7](#).
- For information about connection strings, see [ADO.NET Connection Strings on page 6](#).
- For information about file server and database servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Connector for use with SAP ArchiveLink:

- For information on general operating system requirements, see [General Requirements on page 11](#).
- For information on Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Connector for use with SAP ArchiveLink:

- For information on client hardware requirements, see [OnBase Client Hardware Requirements on page 15](#).
- For information on server hardware requirements, see [Server and Core Services Hardware Requirements on page 17](#).

## ArchiveLink Server Requirements

The ArchiveLink Server must meet the following requirements

Component	Minimum Requirements
<b>HTTP Web Server</b>	Microsoft IIS 6.0 / 7.0.
<b>Operating System</b>	The ArchiveLink Server is supported on any operating system supported for the OnBase Foundation EP5 Web Server. See the <b>Server Supported Operating Systems</b> section for more information on supported operating systems.
<b>CPU</b>	Dual Intel Xeon processor at 2.8 GHz or faster. Maximum CPU speed.
<b>System Memory</b>	2 GB minimum, 4 GB recommended
<b>Database Versions</b>	The ArchiveLink Server is supported on any database version supported for OnBase Foundation EP5. See the <b>Databases Supported</b> section for more information on supported databases.
<b>Dependencies</b>	<ul style="list-style-type: none"> <li>• Microsoft Visual C++ 2012 Redistributable Pack x64</li> <li>• Microsoft Visual C++ 2015 Redistributable Pack x86</li> <li>• Microsoft Visual C++ 2015 Redistributable Pack x64</li> <li>• Microsoft Visual C++ 2019 Redistributable Pack x64</li> </ul>

---

**Note:** This module is not supported for use with an Informix or DB2 database.

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## Third-Party Software Requirements

Connector for use with SAP ArchiveLink supports SAP 4.6c and above.

A browser supported by DocPop is required for viewing documents through DocPop with SAP. For more information, see the DocPop documentation.

# CONTENT CONNECTOR FOR MICROSOFT SHAREPOINT

## Overview

The following sections outline requirements information specific to Content Connector for Microsoft SharePoint in OnBase Foundation EP5. For general requirements information that applies to both Content Connector for Microsoft SharePoint and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

See [Microsoft .NET Framework Requirements on page 11](#) for information on the Microsoft .NET Framework requirements.

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**Note:** This version of .NET must be installed on the server where OnBase Configuration Management and the Content Connector Service is installed.

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## Third-Party Requirements

To use Content Connector for Microsoft SharePoint, you must have one of the following:

- Microsoft SharePoint Foundation 2013
- Microsoft SharePoint Server 2013
- Microsoft SharePoint Server 2016

## Overview

The following sections outline requirements information specific to DeficiencyPop in OnBase Foundation EP5. For general requirements information that applies to both DeficiencyPop and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for DeficiencyPop:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for DeficiencyPop:

- For information on the supported desktop operating systems, see the **Web/ Application Server** table column and the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for DeficiencyPop:

- For information on 32-Bit server hardware requirements, see [32-Bit Server Hardware Requirements on page 17](#).
- For information on Web Client hardware requirements, see [Web Client Hardware Requirements on page 20](#).



# Web Client Browser Requirements

## Macintosh OS

DeficiencyPop is supported on the following browsers in Mac OS X:

- Mozilla Firefox: See [Firefox Browser Support on page 80](#)
- Safari 13.0.0, 13.1.0, and 14.1.1, with the exceptions of full screen mode and Safari Reader
- Google Chrome

## Windows OS

DeficiencyPop is supported on the following browsers in Windows:

- Microsoft Internet Explorer 11 (IE 11)
- Mozilla Firefox: See [Firefox Browser Support on page 80](#)
- Safari 13.0.0, 13.1.0, 14.1.1
- Google Chrome
- Microsoft Edge on Chromium

## Firefox Browser Support

As of OnBase Foundation EP5, DeficiencyPop is supported on Mozilla Firefox version 78 Extended Support Release (ESR).

Going forward, DeficiencyPop will be supported in HTML mode on the latest Firefox ESR version available when OnBase is released. When a new ESR becomes available, it will be tested for compatibility with DeficiencyPop. Once testing has passed, DeficiencyPop will support the current ESR version and one version prior. With each subsequent OnBase release, DeficiencyPop support will be dropped for ESRs no longer supported by Mozilla.

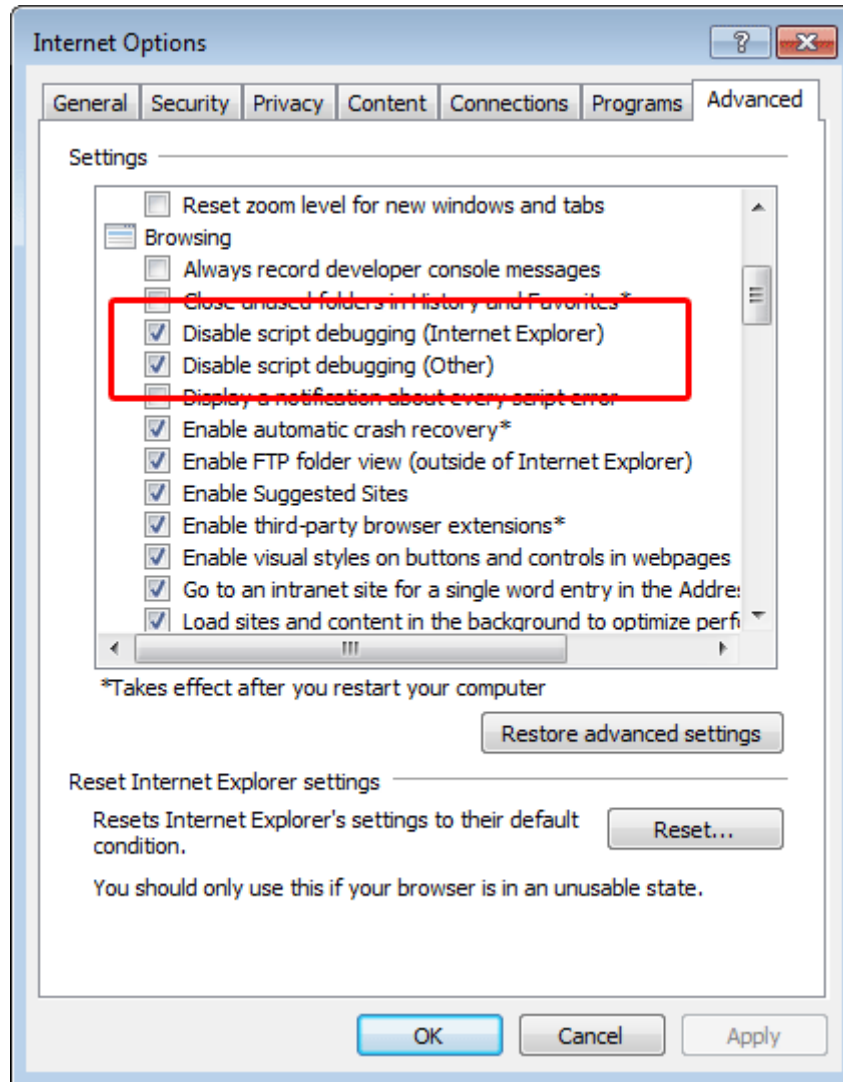
To obtain the latest ESR installer, visit  
<http://www.mozilla.org/en-US/firefox/organizations/all.html>.

## Pop-Up Blockers

Pop-up blockers are not supported. On users' workstations, either pop-up blockers must be disabled, or the web server must be added to the pop-up blocker's list of sites that allow pop-ups.

## Internet Explorer Disable Script Debugging

Internet Explorer Settings must have **Disable Script Debugging (Internet Explorer)** and **Disable Script Debugging (Other)** checked (from Internet Explorer, select **Tools | Internet Options... | Advanced**):

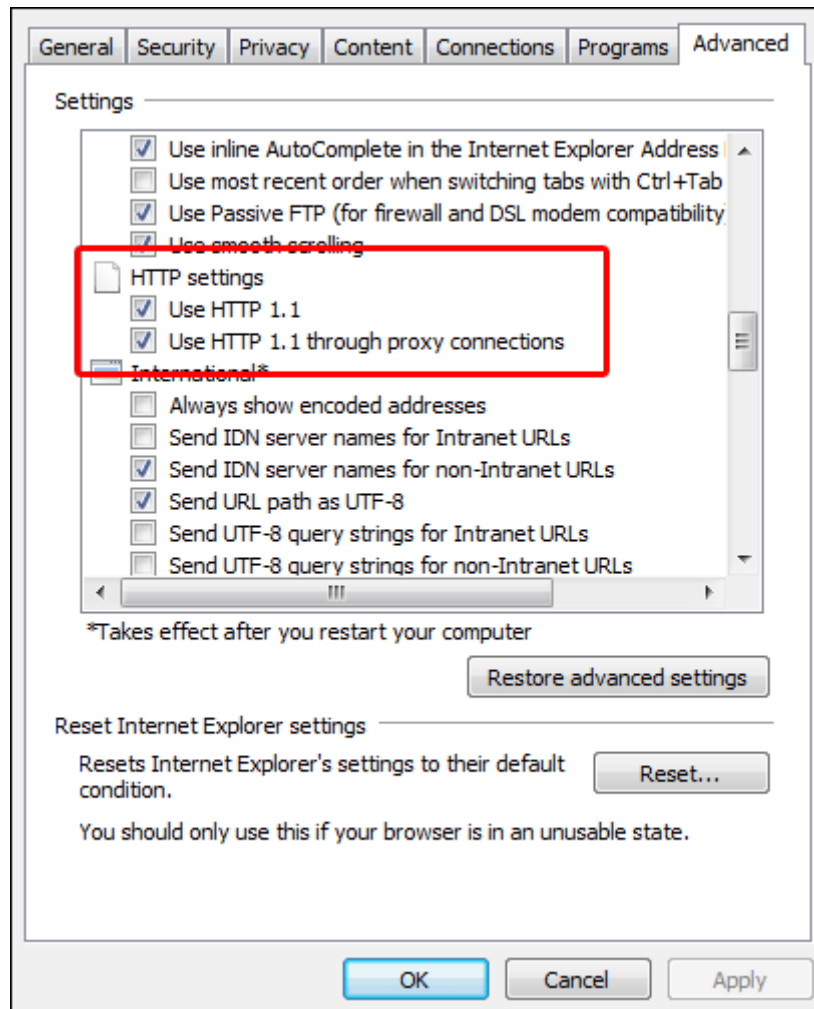


## Proxy Server Setup

Ensure the following items are configured when using a Proxy Server:

**Server side** — If the Web server is using a proxy server, verify that the proxy is setup with HTTP 1.1.

**Client side** — In Internet Explorer, please ensure that **HTTP 1.1 through proxy connections** is checked when using a proxy.



## Overview

The following sections outline requirements information specific to Diagnostics Service and Diagnostics Console in OnBase Foundation EP5. For general requirements information that applies to Diagnostics and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Diagnostics:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## .NET Framework Requirements

The Diagnostics Service and Diagnostics Console both require the full version of Microsoft® .NET Framework. Neither will run with only the .NET Framework Client Profile. OnBase requires .NET Framework 4.7.2 or later.

The Diagnostics Service requires .NET Core 2.1.1 or later.

## Version Requirements

The version of the Diagnostics Console and Diagnostics Service must match the version of OnBase in use to properly function. Older versions of the application do not properly function with newer versions.

## Overview

The following sections outline requirements information specific to Dictionary Import Processor in OnBase Foundation EP5. For general requirements information that applies to both Dictionary Import Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Dictionary Import Processor:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

For information on the hardware requirements for a processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to Digital Signatures in OnBase Foundation EP5. For general requirements information that applies to both Digital Signatures and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for Digital Signatures in the OnBase Client:

- For information on supported client operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Web Browser Requirements on page 13](#).

As part of installing the Web Server, you must properly install Hyland Desktop Host. See the section on Hyland Desktop Host installation in the **Web Server** module reference guide for more information.

## Hardware Requirements

### Client Retrieval Workstation Hardware Requirements

Hardware	Minimum	Recommended
CPU	1.6 GHz, 2-core	2 GHz or faster, 2-core
Memory (RAM)	<ul style="list-style-type: none"><li>• 32-bit OS: 2 GB</li><li>• 64-bit OS: 4 GB</li></ul>	4 GB or greater
Free Hard Disk Space (total for installation itself and post- installation files)	2 GB	2 GB or greater
Screen Resolution	1280 x 768	1280 x 1024 (1440 x 900 widescreen)

---

**Note:** When signing a document with Digital Signatures, the signature temporarily assimilates the open document's memory in OnBase. Once the document is signed, the memory is released.

---

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for Digital Signatures:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)
- [Windows User Account Control Statement on page 24](#)

## Third-Party Software Requirements

The following third-party software components are required for Digital Signatures functionality:

- A digital certificate must be obtained from a Certificate Authority.
- CAPICOM.dll





## Overview

The following sections outline requirements information specific to Directory Import Processor in OnBase Foundation EP5. For general requirements information that applies to both Directory Import Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Directory Import Processor:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Directory Import Processor:

- If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).
- If you are using Directory Import Processor with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to Disconnected Scanning in OnBase Foundation EP5. For general requirements information that applies to both Disconnected Scanning and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Disconnected Scanning:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Windows User Account Control Statement

Windows User Account Control (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.

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**Note:** 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).

---

Disconnected Scanning is unaffected by Windows UAC. If UAC is enabled, Disconnected Scanning functions normally, without any UAC interaction (for example, no UAC pop-up windows are displayed, and you do not have to re-enter your Application Server address when logging back on).

## Hardware Requirements

### 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	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
Scanner	TWAIN compliant	

---

**Note:** To determine the minimum hard disk space required for your Disconnected Scanning workstation, you must consider the number of documents and the characteristics of the documents (for example, color/bi-tonal or resolution) being stored on the local workstation prior to being uploaded to OnBase.

---

### Scanner

The Disconnected Scanning module can use any TWAIN, ISIS, Kofax™, or Fujitsu PaperStream IP-compliant scanner.

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**Note:** Your Disconnected Scanning workstation may have different minimum requirements based on the minimum requirements suggested for your scanner.

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## Application Server Requirements

The Disconnected Scanning module requires access to an OnBase Application Server. The Disconnected Scanning Client version must match the version of the Application Server.

## Third-Party Software Requirements

To use Disconnected Scanning to scan from disk or to perform Image Processing, you must install and configure Kofax software or hardware.

Kofax hardware or software may also be used to perform bar code processing or patch code recognition in lieu of the Hyland Bar Code Recognition software.

If you are using the Adrenaline Image Processing Engine, a dongle (a hardware device similar to a HASP) is required. The dongle is purchased with the Adrenaline software.

## Overview

The following sections outline requirements information specific to Distributed Disk Services in OnBase Foundation EP5. For general requirements information that applies to both Distributed Disk Services and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Distributed Disk Services:

- For information on the supported desktop operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).
- For additional requirements, see [Miscellaneous Requirements on page 23](#).

## Server Requirements

The DDS server must meet the following requirements.

Requirement	Minimum Recommended
Operating System	Windows Server 2012 Windows Server 2012 R2
Processor	1.5 to 2.0 GHz
Memory	256 MB RAM

## Upgrading

When upgrading from a version prior to 2.0.1-b1, to version 2.0.1-b1 or higher, you must create an encryption key for to use after the upgrade has been performed. You must also create a key for new installations.

To create an encryption key, follow the [Validating, Updating, or Rotating the Encryption Key](#) instructions in the Configuration chapter of this manual.

## Overview

The following sections outline requirements information specific to DJDE Input Filter in OnBase Foundation EP5. For general requirements information that applies to both DJDE Input Filter and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for DJDE Input Filter:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for DJDE Input Filter:

- If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).
- If you are using DJDE Input Filter with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to DocPop in OnBase Foundation EP5. For general requirements information that applies to both DocPop and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Prerequisites

DocPop has the following prerequisites:

- The Web Server must be licensed and installed.
- The user must exist in the OnBase user configuration.
- DocPop must be in the <appnet/DocPop> folder of a standard OnBase ASP.NET Web Server installation. This location cannot be modified.
- The Web Server's Web.config file must specify the name of the OnBase data source to use with DocPop.

See the **Web Server** module reference guide for Web Server requirements.

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**Note:** The Firefox web browser is not supported to open documents into the Office Business Application modules from DocPop links.

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## Operating System Requirements

See the following sections for more information on the operating system requirements for DocPop:

- For information on the supported operating systems, see the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

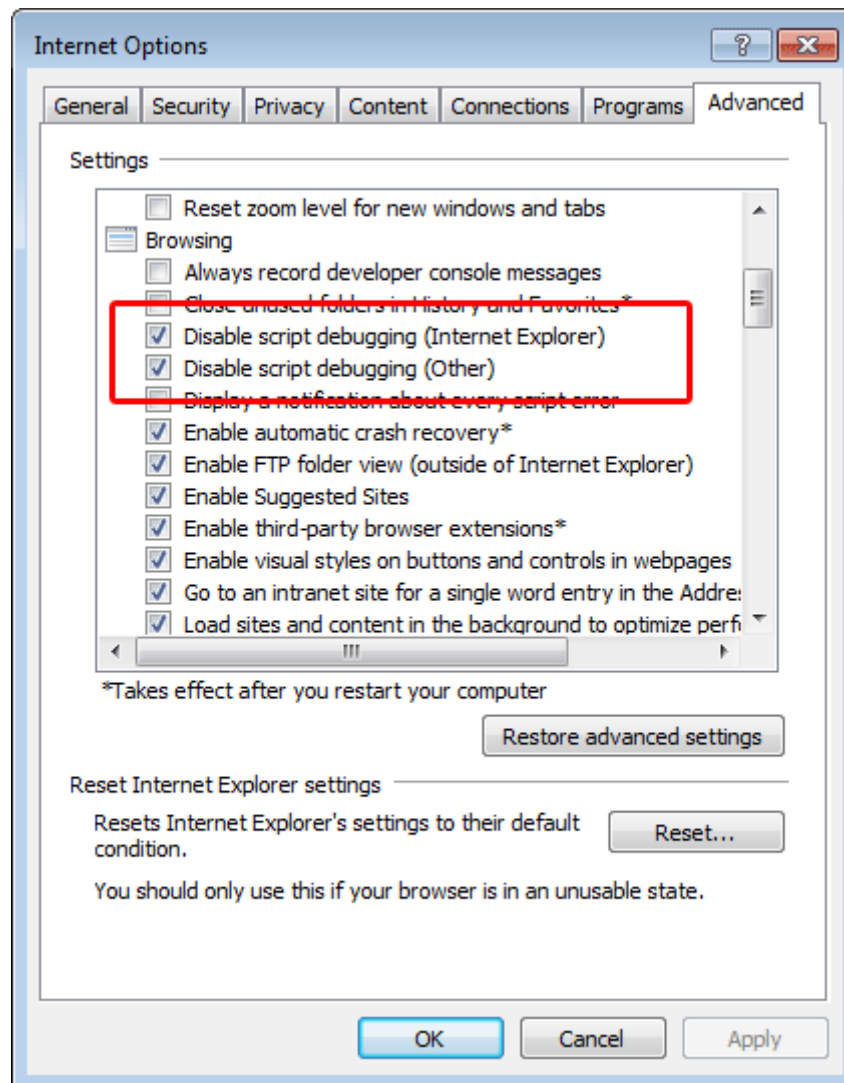
For web browser requirements for DocPop, see [Web Client Browser Requirements on page 13](#).

See the following sections for additional web browser configuration required for DocPop.



## Internet Explorer Disable Script Debugging

Internet Explorer Settings must have **Disable Script Debugging (Internet Explorer)** and **Disable Script Debugging (Other)** checked (from Internet Explorer, select **Tools | Internet Options... | Advanced**):

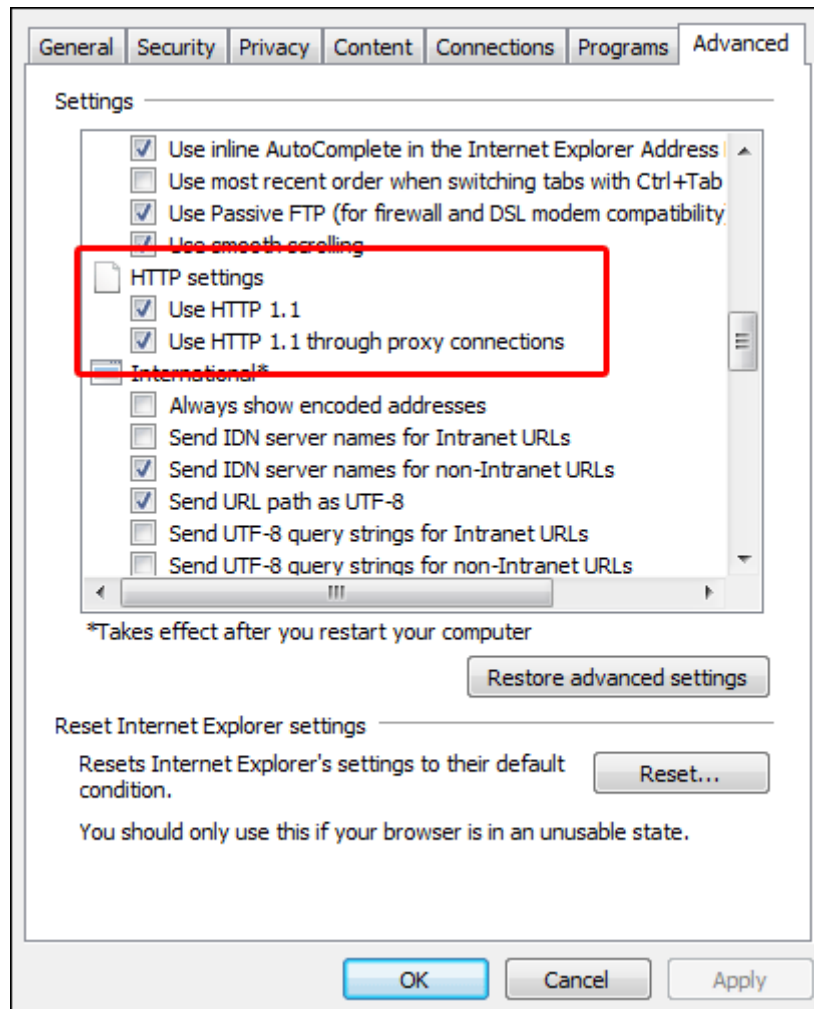


## Proxy Server Setup

Ensure the following items are configured when using a Proxy Server:

**Server side** — If the Web server is using a proxy server, verify that the proxy is setup with HTTP 1.1.

**Client side** — In Internet Explorer, please ensure that **HTTP 1.1 through proxy connections** is checked when using a proxy.



## Hardware Requirements

For hardware requirements for DocPop, see [Web Client Browser Requirements](#) on page 13.

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for DocPop:

- [Third-Party Software Compatibility](#) on page 23
- [About Virtual Environments](#) on page 23

- 64-Bit Support Statement on page 24
- Windows User Account Control Statement on page 24

## Overview

The following sections outline requirements information specific to Document Composition in OnBase Foundation EP5. For general requirements information that applies to both Document Composition and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Composition:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

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**Note:** These .NET requirements apply to all workstations using and configuring Document Composition, including the server that will be used to manage Enterprise Document Composition requests.

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- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Document Composition:

- If you are using Document Composition with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using Document Composition with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Document Composition:

- If you are using Document Composition with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- If you are using Document Composition with the Web Client, see [Web Client Hardware Requirements on page 20](#).
- If you are using Document Composition with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).

## Third-Party Software Requirements

A supported version of Microsoft Word must be installed on workstations that will be configuring Document Composition and/or generating documents with the OnBase Client, Web Client, and Unity Client.

## Hyland Desktop Host Requirements

The Hyland Desktop Host must be installed if documents are to be previewed or edited during composition in the HTML-only Web Client.

## Overview

The following sections outline requirements information specific to Document Distribution in OnBase Foundation EP5. For general requirements information that applies to both Document Distribution and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Distribution

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Document Distribution:

- If you are using Document Distribution with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using Document Distribution with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

# Hardware Requirements

See the following sections for more information on the hardware requirements for Document Distribution:

- If the workstation will be used for processing, see [Processing Workstation Minimum Hardware Requirements on page 16](#).
- If the workstation will be used for CD/DVD/Blu-ray authoring, see [CD/DVD/Blu-ray Authoring Workstation Hardware Requirements on page 14](#).
- If you are using Document Distribution with the Web Client, see [Web Client Hardware Requirements on page 20](#).
- If you are using Document Distribution with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).

## Overview

The following sections outline requirements information specific to Document eCommerce in OnBase Foundation EP5. For general requirements information that applies to both Document eCommerce and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document eCommerce:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Web Browser Requirements on page 13](#) for more information.

## Hardware Requirements

See [Hardware Requirements on page 103](#) for more information.



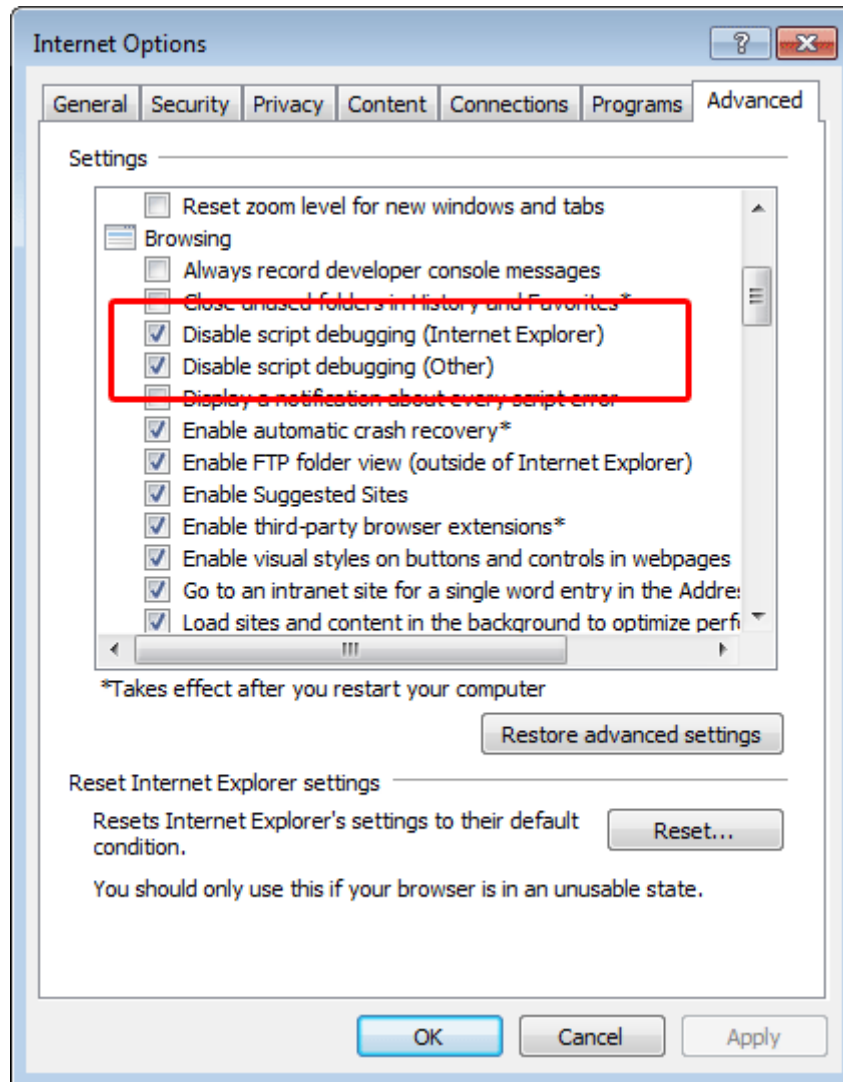
## eCommerce Hardware Requirements

Web Client Component	Minimum	Recommended
CPU	1 GHz	
Memory (RAM)	1 GB	2 GB or greater
Free Hard Disk Space	<ul style="list-style-type: none"><li>• For installing and running the ActiveX Web Client: 200 MB</li><li>• For installing and running the Desktop Host: 400 MB</li></ul>	
Screen Resolution	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
Email Platform	MAPI 1.1 Compliant Email Client connection and supporting Active Messaging DLLs	

# Web Browser Support Settings

## Internet Explorer Disable Script Debugging

Internet Explorer Settings must have **Disable Script Debugging (Internet Explorer)** and **Disable Script Debugging (Other)** checked (from Internet Explorer, select **Tools | Internet Options... | Advanced**):

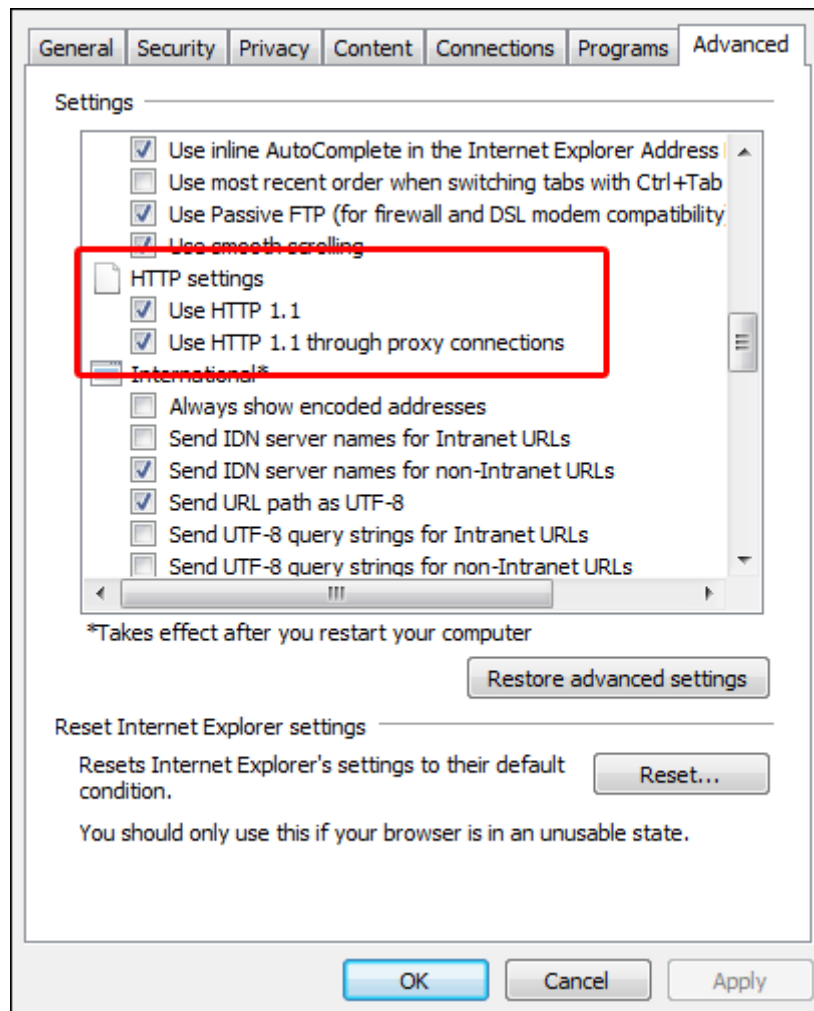


## Proxy Server Setup

Ensure the following items are configured when using a Proxy Server:

**Server side** — If the Web server is using a proxy server, verify that the proxy is setup with HTTP 1.1.

**Client side** — In Internet Explorer, please ensure that **HTTP 1.1 through proxy connections** is checked when using a proxy.



## Overview

The following sections outline requirements information specific to Document Imaging in OnBase Foundation EP5. For general requirements information that applies to both Document Imaging and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Imaging:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Document Imaging:

- If you are using Document Imaging with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using Document Imaging with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Document Imaging:

- If you are using Document Imaging with the OnBase Client, see [Client Scanning Workstation Hardware Requirements on page 108](#).
- If you are using Document Imaging with the Web Client, Unity Client, or both, see [Unity Client Scanning Workstation Hardware Requirements on page 108](#).

### Client Scanning Workstation Hardware Requirements

Hardware	Minimum	Recommended
<b>CPU</b>	1 GHz	2 GHz or faster
<b>Memory (RAM)</b>	512 MB	2 GB or greater
<b>Free Hard Disk Space (total for installation itself and post-installation files)</b>	2 GB	2 GB or greater
<b>Screen Resolution</b>	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
<b>Scanner</b>	TWAIN compliant	

### Unity Client Scanning Workstation Hardware Requirements

Hardware	Minimum	Recommended
<b>CPU</b>	1.6 GHz, 2-core	2.4 GHz or faster, 2-core
<b>Memory (RAM)</b>	4 GB	6 GB
<b>Free Hard Disk Space (total for installation itself and post-installation files)</b>	2 GB	2 GB or greater
<b>Screen Resolution</b>	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
<b>Scanner</b>	TWAIN compliant	

## Third-Party Software Requirements

To use the **Image Processing** option when configuring a scan format, install and configure Kofax Image Controls or Kofax Software Virtual ReScan (SVRS) with the Adrenaline Image Processing Engine (AIPE).

## Overview

The following sections outline requirements information specific to Document Import Processor in OnBase Foundation EP5. For general requirements information that applies to both Document Import Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Import Processor:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

For information on the hardware requirements for a processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to Document Knowledge Transfer & Compliance in OnBase Foundation EP5. For general requirements information that applies to both Document Knowledge Transfer & Compliance and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Document Knowledge Transfer & Compliance:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Knowledge Transfer & Compliance:

- For information on the supported desktop operating systems, see the **OnBase Client**, **Web Client**, and **Unity Client** table columns in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on Microsoft Visual C++ requirements for the OnBase Client, see [General C++ Requirements on page 12](#).
- For information on Microsoft Visual C++ requirements for the Application/Web server, see [Server C++ Requirements on page 12](#).



## Web Browser Requirements

See the following sections for more information on the web browser requirements for Document Knowledge Transfer & Compliance:

- For information on Web Client browser requirements, see [Web Client Browser Requirements on page 13](#).

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**Note:** Document Knowledge Transfer & Compliance is not supported for use with the Microsoft Edge web browser.

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- For information on Unity Client browser requirements, see [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Document Knowledge Transfer & Compliance:

- For information on OnBase Client retrieval workstation hardware requirements, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- For information on Web Client hardware requirements, see [Web Client Hardware Requirements on page 20](#).

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**Note:** Document Knowledge Transfer & Compliance is not supported for use with the Microsoft Edge web browser.

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- For information on Unity Client hardware requirements, see [Unity Client Platform Hardware Requirements on page 21](#).

## Overview

The following sections outline requirements information specific to Document Packaging in OnBase Foundation EP5. For general requirements information that applies to both Document Packaging and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Packaging:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Web Browser Requirements on page 13](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Document Packaging:

- If you are using Document Packaging with the Web Client, see [Web Client Hardware Requirements on page 20](#).
- If you are using Document Packaging with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).

## Overview

The following sections outline requirements information specific to Document Retention in OnBase Foundation EP5. For general requirements information that applies to both Document Retention and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Document Retention:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Retention:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Document Retention:

- If you are using Document Retention with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using Document Retention with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

# Hardware Requirements

See the following sections for more information on the hardware requirements for Document Retention:

- If you are using Document Retention with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- If you are using Document Retention the Web Client, see [Web Client Hardware Requirements on page 20](#).
- If you are using Document Retention with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).
- If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to Document Tracking in OnBase Foundation EP5. For general requirements information that applies to both Document Tracking and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Tracking:

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).
- For information on how Windows User Account Control (UAC) can impact modifications made to configuration files, see [Modifying Configuration Files on page 24](#).

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Web Browser Requirements

See [Unity Client Browser Requirements](#) on page 14.

## Hardware Requirements

See [Unity Client Platform Hardware Requirements](#) on page 21.

## Overview

The following sections outline requirements information specific to Document Transfer in OnBase Foundation EP5. For general requirements information that applies to both Document Transfer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Transfer:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Document Transfer Service Requirements

The Document Transfer Service requires the following Microsoft Visual C++ Redistributable Packages:

- Microsoft Visual C++ 2012 Redistributable Package (x86)
- Microsoft Visual C++ 2013 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)

## Additional Module Requirements

Document Transfer requires the OnBase application server. If DocPop is going to be used to retrieve documents for which only the metadata is replicated, you must also have the OnBase web server.

---

**Note:** The sending and receiving sites must be using the same version of OnBase. Document Transfer cannot transfer files between different versions of OnBase.

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## Overview

The following sections outline requirements information specific to EDI 810 Processor in OnBase Foundation EP5. For general requirements information that applies to both EDI 810 Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for EDI 810 Processor:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to EDI 835 EOB Processor in OnBase Foundation EP5. For general requirements information that applies to both EDI 835 EOB Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for EDI 835 EOB Processor:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to EDI 837 Processor in OnBase Foundation EP5. For general requirements information that applies to both EDI 837 Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for EDI 837 Processor:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to EDI TS 130 Processor in OnBase Foundation EP5. For general requirements information that applies to both EDI TS 130 Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for EDI TS 130 Processor:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to EDM Services in OnBase Foundation EP5. For general requirements information that applies to both EDM Services and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for EDM Services:

- For information on supported server operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements for the OnBase Client, Web Client, and Unity Client, see [Microsoft Visual C++ Requirements on page 12](#).

## Microsoft Visual C++ Requirements for EDM Briefcase

EDM Briefcase has specific requirements regarding Microsoft Visual C++.

The following Microsoft Visual C++ Redistributable Packages are required:

- Microsoft Visual C++ 2012 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)

If you are using a 64-bit system, the following Microsoft Visual C++ Redistributable Packages are also required:

- Microsoft Visual C++ 2012 Redistributable Package (x64)
- Microsoft Visual C++ 2019 Redistributable Package (x64)

If not already present on your system, these packages are installed when the **setup.exe** installer is used to install the OnBase Client or Configuration modules.

This package is also installed when the **setup.exe** installer is used to install EDM Briefcase on a workstation.

## Web Browser Requirements

The Web Server and both the 32-bit and 64-bit versions of the Application Server are supported on Microsoft Internet Explorer 11 (IE 11) running in IE 11 document mode.

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**Note:** You must ensure that all Windows Server updates are applied.

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**Note:** The EDM Briefcase and Document Templates are only supported in the ActiveX version of the Web Client. The HTML Web Client does not support the EDM Briefcase or Document Templates.

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## Hardware Requirements

See the following sections for more information on the hardware requirements for EDM Services:

- For OnBase Client hardware requirements, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- For Web Client hardware requirements, see [Web Client Hardware Requirements on page 20](#).
- For Unity Client hardware requirements, see [Unity Client Platform Hardware Requirements on page 21](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for EDM Services:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)
- [Windows User Account Control Statement on page 24](#)
- [Modifying Configuration Files on page 24](#)

## Overview

The following sections outline requirements information specific to E-Forms in OnBase Foundation EP5. For general requirements information that applies to both E-Forms and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for E-Forms:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for E-Forms:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for E-Forms:

- If you are using E-Forms with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using E-Forms with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for E-Forms:

- If you are using E-Forms with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- If you are using E-Forms the Web Client, see [Web Client Hardware Requirements on page 20](#).
- If you are using E-Forms with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).

## Third-Party Software Requirements

The ability to create and edit HTML documents is required for the E-Forms module. In many cases, an HTML editor, such as Microsoft Expression Web, is usually used to create HTML forms that are used in OnBase. Notepad, or any text editor, can be used if the user has HTML coding knowledge.



## Overview

The following sections outline requirements information specific to EIS Workflow Messaging in OnBase Foundation EP5. For general requirements information that applies to both EIS Workflow Messaging and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Microsoft .NET Framework Requirements

For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Microsoft Visual C++ Requirements

For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for EIS Workflow Messaging:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)

## Overview

The following sections outline requirements information specific to Electronic Plan Review in OnBase Foundation EP5. For general requirements information that applies to both Electronic Plan Review and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Electronic Plan Review:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Web Browser Requirements on page 13](#) for more information.

## Hardware Requirements

See [Hardware Requirements on page 129](#) for more information.

## Unity Client Supported Operating Systems

- Windows 8.1
- Windows Server 2012 R2
- Windows 10
- Windows Server 2016

- Windows Server 2019
- Windows Server 2019 Server Core
- Windows Server 20H2 Server Core

**Note:** As of OnBase Foundation EP3, the Windows 7 and Windows Server 2008 R2 operating systems are no longer supported. If you are using any of these operating systems, you should not upgrade to OnBase Foundation EP5 until you have upgraded to a Windows operating system supported by OnBase. For a complete list of operating systems that are no longer supported, see the **Technical Requirements Overview for New Installations and Upgrades** document.

## Plan Review Website Hardware and Browser Requirements

To run the Electronic Plan Review public-facing website, a user's workstation must meet the following requirements:

Web Site 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) <b>Note:</b> Using a lower resolution may result in a loss of functionality.	1280 x 1024 (1440 x 900 widescreen)
Web Browser	<ul style="list-style-type: none"> <li>• Edge 92</li> <li>• Firefox 91</li> <li>• Chrome 92</li> <li>• Safari 14.1.1</li> </ul> <b>Note:</b> Earlier versions of each browser may work, but are not officially supported. If issues arise, upgrade your browser as a first troubleshooting step.	
Email Platform	MAPI 1.1 Compliant Email Client connection and supporting Active Messaging DLLs	



## Overview

The following sections outline requirements information specific to Encrypted Alpha Keywords in OnBase Foundation EP5. For general requirements information that applies to both Encrypted Alpha Keywords and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Encrypted Alpha Keywords:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Encrypted Alpha Keywords:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Overview

The following sections outline requirements information specific to Enterprise Integration Server in OnBase Foundation EP5. For general requirements information that applies to both Enterprise Integration Server and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Microsoft .NET Framework Requirements

For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Microsoft Visual C++ Requirements

For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Third-Party Software Requirements

The Enterprise Integration Server requires the Microsoft Windows Communication Foundation (WCF) Line of Business (LOB) Adapter SDK (WCF LOB Adapter SDK). The adapter will be installed during the Microsoft BizTalk installation process, or you can also download the WCF LOB Adapter SDK from <http://www.microsoft.com/>.

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for Enterprise Integration Server:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)

# ENTERPRISE WEB ACCESS FOR DOCUMENT KNOWLEDGE TRANSFER & COMPLIANCE

## Overview

The following sections outline requirements information specific to Enterprise Web Access for Document Knowledge Transfer & Compliance in OnBase Foundation EP5. For general requirements information that applies to both Enterprise Web Access for Document Knowledge Transfer & Compliance and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Enterprise Web Access for Document Knowledge Transfer & Compliance:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Enterprise Web Access for Document Knowledge Transfer & Compliance:

- For information on the supported desktop operating systems, see the **OnBase Client**, **Web Client**, and **Unity Client** table columns in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on Microsoft Visual C++ requirements for the OnBase Client, see [General C++ Requirements on page 12](#).
- For information on Microsoft Visual C++ requirements for the Application/Web server, see [Server C++ Requirements on page 12](#).



## Web Browser Requirements

See the following sections for more information on the web browser requirements for Enterprise Web Access for Document Knowledge Transfer & Compliance:

- For information on Web Client browser requirements, see [Web Client Browser Requirements on page 13](#).

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**Note:** Enterprise Web Access for Document Knowledge Transfer & Compliance is not supported for use with the Microsoft Edge web browser.

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- For information on Unity Client browser requirements, see [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Enterprise Web Access for Document Knowledge Transfer & Compliance:

- For information on OnBase Client retrieval workstation hardware requirements, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- For information on Web Client hardware requirements, see [Web Client Hardware Requirements on page 20](#).

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**Note:** Enterprise Web Access for Document Knowledge Transfer & Compliance is not supported for use with the Microsoft Edge web browser.

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- For information on Unity Client hardware requirements, see [Unity Client Platform Hardware Requirements on page 21](#).

## Overview

The following sections outline requirements information specific to Event Relay Server in OnBase Foundation EP5. For general requirements information that applies to both Event Relay Server and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for Event Relay Server:

- For information on supported server operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for Event Relay Server:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)
- [Windows User Account Control Statement on page 24](#)
- [Modifying Configuration Files on page 24](#)

## Overview

There are no requirements specific to Exception Reports in OnBase Foundation EP5. For general requirements information that applies to both Exception Reports and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Overview

The following sections outline requirements information specific to Express Scanning in OnBase Foundation EP5. For general requirements information that applies to both Express Scanning and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Express Scanning:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).
- For information on how Windows User Account Control (UAC) can impact modifications made to the Express Scanning configuration file, see [Modifying Configuration Files on page 24](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#).

# Hardware Requirements

## Client Scanning Workstation Hardware Requirements

Hardware	Minimum	Recommended
<b>CPU</b>	1 GHz	2 GHz or faster
<b>Memory (RAM)</b>	512 MB	2 GB or greater
<b>Free Hard Disk Space (total for installation itself and post-installation files)</b>	2 GB	2 GB or greater
<b>Screen Resolution</b>	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
<b>Scanner</b>	TWAIN compliant	

## Overview

The following sections outline requirements information specific to the External Access Client in OnBase Foundation EP5. For general requirements information that applies to both the External Access Client and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## General Requirements

The External Access Client requires an OnBase Web Server, an Application Server, and the Workflow and StatusView modules.

## Overview

The following sections outline requirements information specific to External Mail Services in OnBase Foundation EP5. For general requirements information that applies to both External Mail Services and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for External Mail Services:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Third-Party Software

- **IBM Lotus Notes** - 8.0 or greater; supports a direct link and can also utilize a **Messaging Application Programming Interface (MAPI)** connection using **Windows Messaging Services (WMS)**.
- **Novell GroupWise** - 8.0 or greater; requires a MAPI connection using WMS.

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**Note:** Using Novell GroupWise 8.0.2 or 12.0.0 is not recommended due to a known issue in which attachments are duplicated.

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- Supported versions of **Microsoft Outlook**.

- **SMTP/ POP (Simple Mail Transfer Protocol)** - a protocol for sending email messages between servers. Most email systems that send mail over the Internet use SMTP to send messages from one server to another. The messages can then be retrieved with an email client using either POP or IMAP. In addition, SMTP is generally used to send messages from a mail client to a mail server. This is why you need to specify both the POP or IMAP server and the SMTP server when you configure your email application.

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**Note:** SMTP is currently not supported in the Unity Client or Web Client.

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**Note:** OnBase External Mail Services respects restrictions set by third-party email systems (such as file attachment size limits). This may result in a situation where the user is presented with the OnBase **Mail Message** dialog box instead of the email program's native format.

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## Overview

The following sections outline requirements information specific to FHIR in OnBase Foundation EP5. For general requirements information that applies to both FHIR and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for the Application Server:

- For information on supported server operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#).

## Hardware Requirements

See [64-Bit Server Hardware Requirements on page 18](#).

## Overview

The following sections outline requirements information specific to FolderPop in OnBase Foundation EP5. For general requirements information that applies to both FolderPop and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Prerequisites

FolderPop has the following prerequisites:

- The Web Server must be licensed and installed.
- The user must exist in the OnBase user configuration.
- FolderPop must be in the <appnet/FolderPop> folder of a standard OnBase ASP.NET Web Server installation. This location cannot be modified.
- The Web Server's Web.config file must specify the name of the OnBase data source to use with FolderPop.

See the **Web Server** module reference guide for Web Server requirements.

## Operating System Requirements

See the following sections for more information on the operating system requirements for FolderPop:

- For information on the supported operating systems, see the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

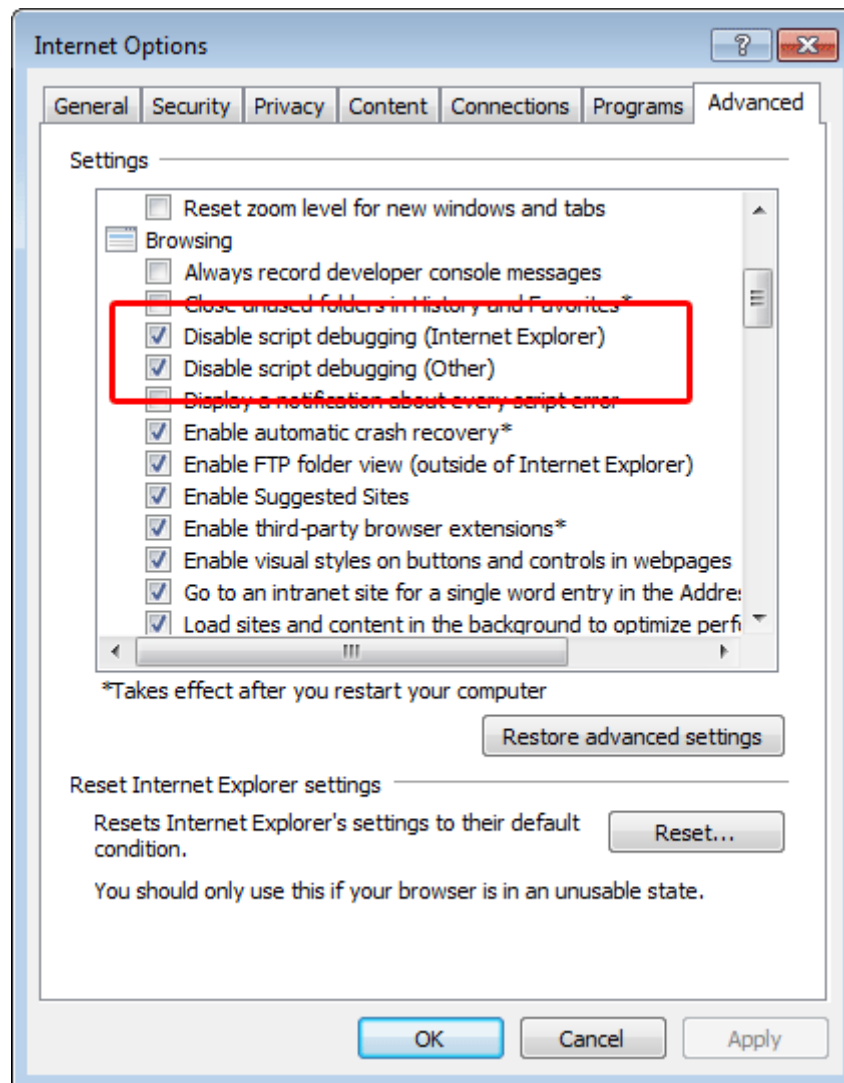
## Web Browser Requirements

For web browser requirements for FolderPop, see [Web Client Browser Requirements on page 13](#).

See the following sections for additional web browser configuration required for FolderPop.

## Internet Explorer Disable Script Debugging

Internet Explorer Settings must have **Disable Script Debugging (Internet Explorer)** and **Disable Script Debugging (Other)** checked (from Internet Explorer, select **Tools | Internet Options... | Advanced**):

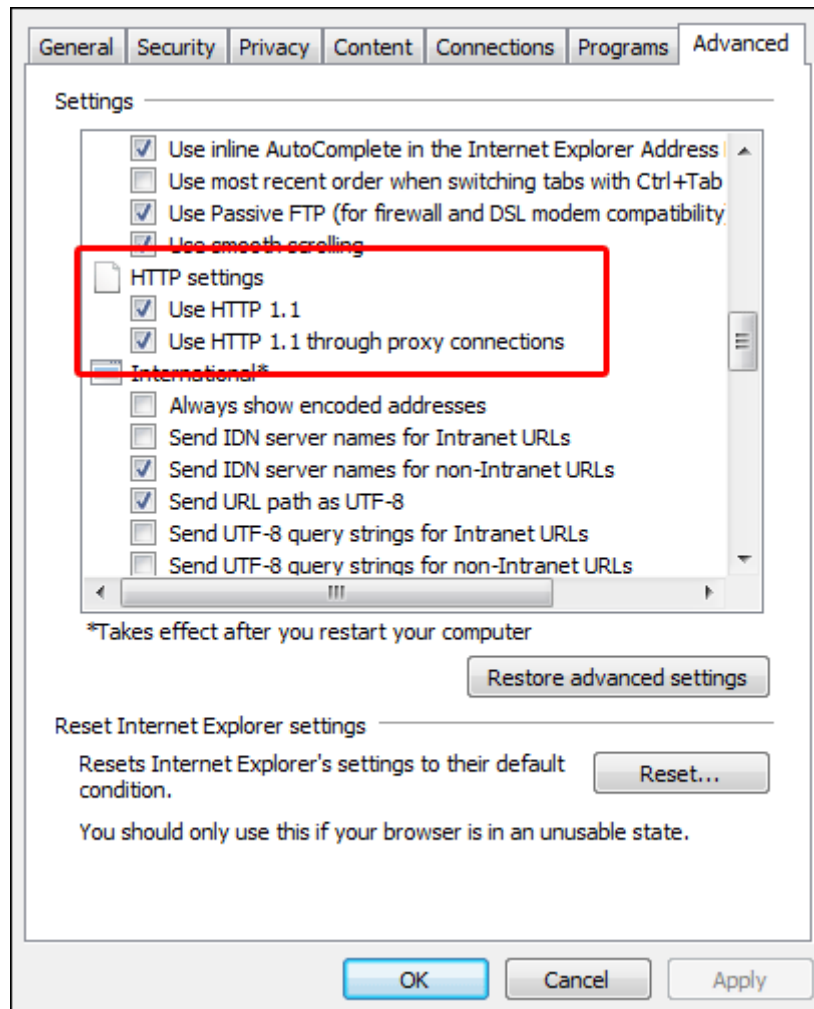


## Proxy Server Setup

Ensure the following items are configured when using a Proxy Server:

**Server side** — If the Web server is using a proxy server, verify that the proxy is setup with HTTP 1.1.

**Client side** — In Internet Explorer, please ensure that **HTTP 1.1 through proxy connections** is checked when using a proxy.



## Hardware Requirements

For hardware requirements for FolderPop, see [Web Client Browser Requirements](#) on page 13.

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for FolderPop:

- [Third-Party Software Compatibility](#) on page 23
- [About Virtual Environments](#) on page 23

- 64-Bit Support Statement on page 24
- Windows User Account Control Statement on page 24

## Overview

The following sections outline requirements information specific to Front Office Scanning in OnBase Foundation EP5. For general requirements information that applies to both Front Office Scanning and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Front Office Scanning:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).
- For information on how Windows User Account Control (UAC) can impact modifications made to the Front Office Scanning configuration file, see [Modifying Configuration Files on page 24](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Front Office Scanning:

- For information on the hardware requirements for the 32-bit Application Server, see [32-Bit Server Hardware Requirements on page 17](#).
- For information on the hardware requirements for the 64-bit Application Server, see [64-Bit Server Hardware Requirements on page 18](#).

## 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	1280 x 768	1280 x 1024 (1440 x 900 widescreen)
Scanner	TWAIN compliant	

## Additional Requirements Considerations

### Creating the Automated Console Registry Settings

Typically, when configuring a Front Office Scanning/Application Enabler Automated Console solution, an administrator would manually log on the Front Office Scanning client once during configuration in order to create the **LastLocation** registry key that allows the Front Office Scanning client to automatically launch.

However, when Windows UAC is enabled, be aware that UAC may, depending on the rights of the administrator, prevent the administrator from adding/modifying registry settings.

There are two potential solutions to this issue:

- **When UAC is Set at the Default Level.** When manually launching Front Office Scanning as part of the Automated Console mode configuration, the Front Office Scanning client must be launched as an administrator (that is, a user with administrator rights must right-click the shortcut to the Front Office Scanning client and select **Run as Administrator**) in order to create the **LastLocation** registry key.
- **When UAC is Set at the Lowest Level.** When manually launching Front Office Scanning as part of the Automated Console mode configuration, the Front Office Scanning client can be launched by any non-administrator to create the **LastLocation** registry key.

## Overview

The following sections outline requirements information specific to Full-Page OCR in OnBase Foundation EP5. For general requirements information that applies to both Full-Page OCR and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Document Imaging:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [OCR Processing Workstation Hardware Requirements on page 13](#).

## Third-Party Software Requirements

To use the **Image Processing** option when configuring a scan format, install and configure Kofax Image Controls or Kofax Software Virtual ReScan (SVRS) with the Adrenaline Image Processing Engine (AIPE).

---

**Note:** See the **Document Imaging** module reference guide for detailed instructions on installing and configuring Kofax scanning environments.

---



## Overview

The following sections outline requirements information specific to Full Text Search in OnBase Foundation EP5. For general requirements information that applies to both Full Text Search and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Full Text Search Requirements

Full-Text Search uses a Hyland Full-Text Server. This section includes information on the requirements of the Hyland Full-Text Server.

The Hyland Full-Text Server is a 64-bit application and requires a 64-bit server. Full-Text Search also requires other OnBase modules that may have separate requirements.

- For the requirements of the OnBase Application Server, see the **Application Server** module reference guide.
- For the requirements of the Hyland OCR Engine, see the **Full-Page OCR** module reference guide.
- For the requirements of the OnBase Client, Web Client, and Unity Client, see the corresponding client module reference guides.

## Database Requirements

See [Database Requirements on page 6](#).

## Hyland Full-Text Server Supported Operating Systems

The following operating systems are supported for use with the Hyland Full-Text Server:

- Microsoft Windows Server 2012 RS (64-bit)
- Microsoft Windows Server 2016 (64-bit)

## Hardware Requirements

See [Hyland Full-Text Server Requirements on page 19](#).

## Load Balancing

This module supports load balancing across multiple Web Servers and Application Servers. Load balancers must support either IP-based or cookie-based load balancing (also referred to as layer-3, layer-4, and layer-7 load balancing). Load balancers also must be configured to use persistent session (or sticky session) load balancing. For information about configuring your load balancer, refer to its documentation. For information about configuring OnBase modules for load balancing, refer to the Web Server module reference guide.

Full-Text Search supports load balancing across multiple Application Servers. Load balancers must support either IP-based or cookie-based load balancing (also referred to as layer-3, layer-4, and layer-7 load balancing).

## Overview

The following sections outline requirements information specific to Gateway Caching Server in OnBase Foundation EP5. For general requirements information that applies to both Gateway Caching Server and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for Gateway Caching Server:

- For information on supported server operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#).

## Hardware Requirements

See [32-Bit Server Hardware Requirements on page 17](#).

## Server Hard Drive Configuration

Because the Gateway Caching Server closely resembles a server hosting the Disk Groups, its hard drive configuration must be appropriate for processing document requests. Use fast storage for the cache location. Fast storage often can be achieved using drives in a RAID or spanned configuration.

## Load Balancing

The Gateway Caching Server is supported in a load-balanced environment. If you configure load balancing, ensure all load-balanced Gateway Caching Servers point to the same network cache location. There should be only one cache per geographic gateway location.

Each Gateway Caching Server must be installed on a separate machine. Load balancing with multiple gateways on the same machine is not supported.

For more information on load balancing, see the **Application Server** module reference guide.

## Overview

The following sections outline requirements information specific to the Healthcare Form Manager in OnBase Foundation EP5. For general requirements information that applies to both the Healthcare Form Manager and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Healthcare Form Manager:

- For information on the supported server operating systems, see the **Web/Application Server** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the supported client operating systems, see the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for the Healthcare Form Manager.

## Server Browser Requirements

See [Server Browser Requirements on page 14](#).

## Client Workstation Browser Requirements

Healthcare Form Manager is supported on the following browsers:

- Google Chrome 89 or greater
- Mozilla Firefox 78 Extended Support Release (ESR) or greater
- Mozilla Firefox 87 or greater
- Windows only:
  - Microsoft Edge on Chromium 89 or greater
  - Microsoft Internet Explorer 11 (IE 11)
- Mac OS only: Safari 14.0.x, with the exceptions of full screen mode and Safari Reader

## Pop-Up Blockers

Pop-up blockers are not supported. On client workstations, either pop-up blockers must be disabled, or Healthcare Form Manager must be added to the pop-up blocker's list of sites that allow pop-ups.

## Internet Explorer Settings

### Tabbed Browsing

It is considered a best practice to make sure Internet Explorer's Tabbed Browsing Settings are configured to use either of the following pop-up settings:

- **Always open pop-ups in a new window**
- **Let Internet Explorer decide how pop-ups should open**

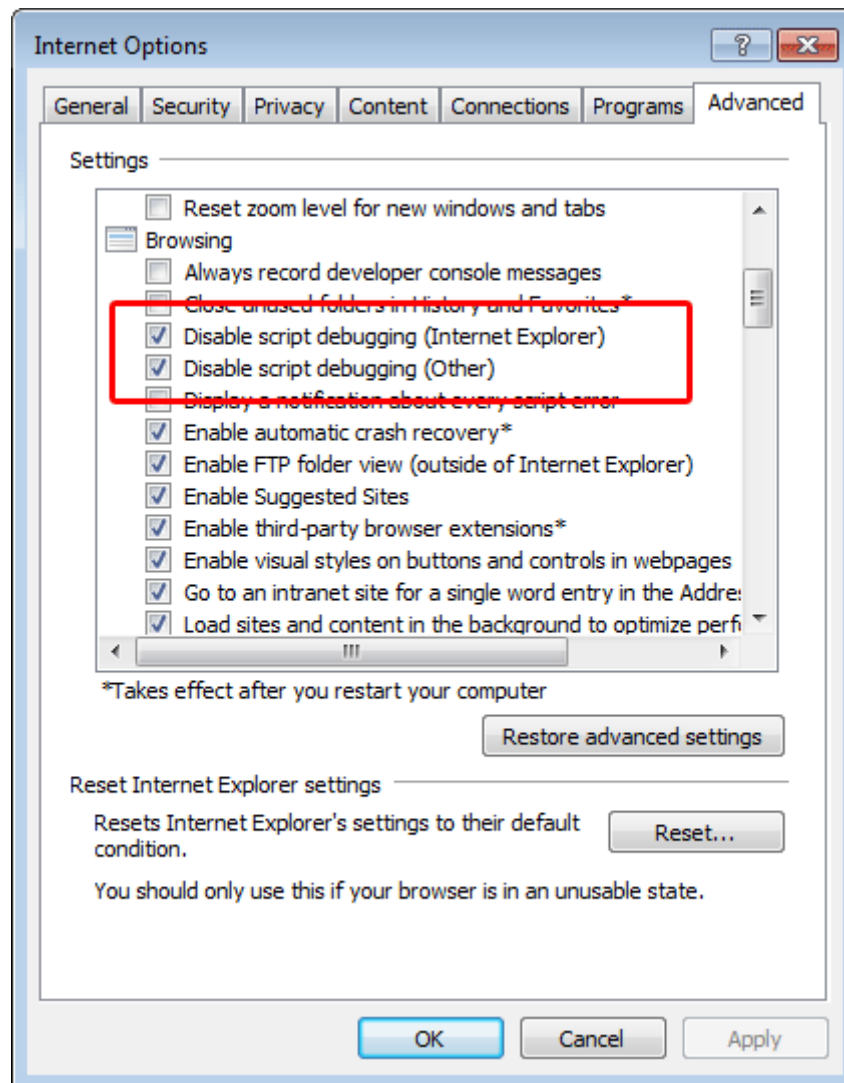
Using these settings will ensure Healthcare Form Manager functions as intended.

### Internet Explorer Miscellaneous Settings

Workstations accessing the Healthcare Form Manager should have **Allow script-initiated windows without size or position constraints** set to **Enable**.

## Internet Explorer Disable Script Debugging

Internet Explorer Settings must have **Disable Script Debugging (Internet Explorer)** and **Disable Script Debugging (Other)** checked (from Internet Explorer, select **Tools | Internet Options... | Advanced**):

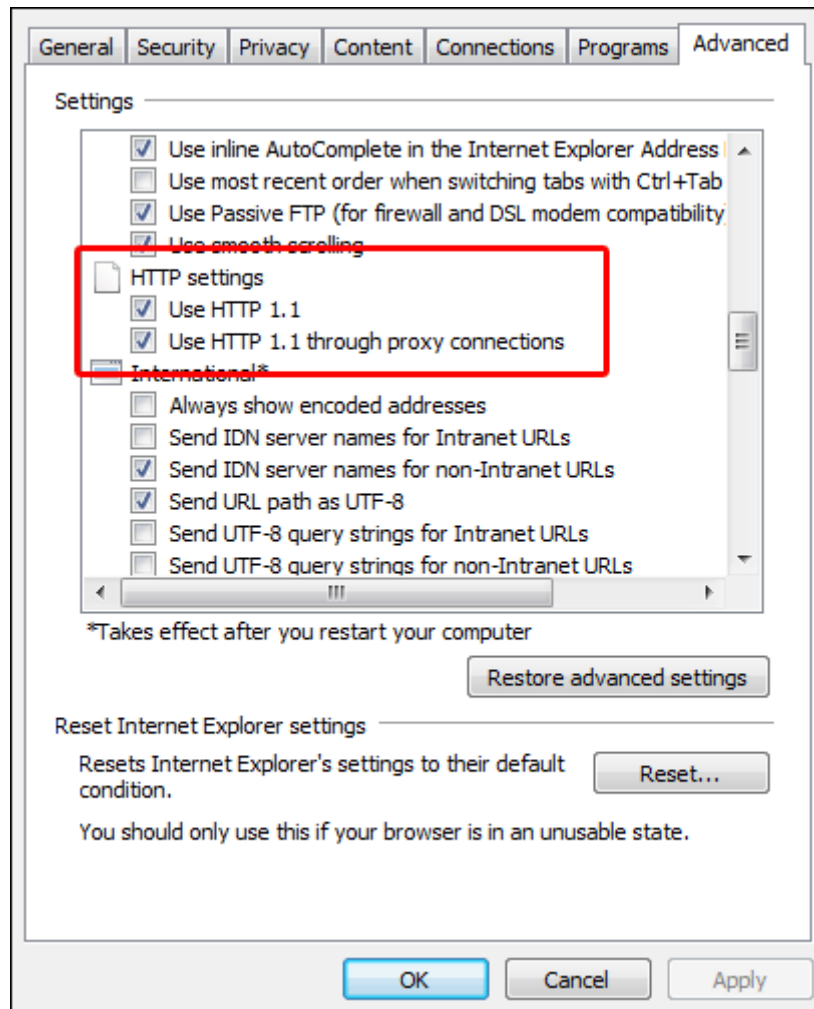


## Proxy Server Setup

Ensure the following items are configured when using a Proxy Server:

**Server side** — If the Web server is using a proxy server, verify that the proxy is setup with HTTP 1.1.

**Client side** — In Internet Explorer, please ensure that **HTTP 1.1 through proxy connections** is checked when using a proxy.



## Server and Core Services Hardware Requirements

See the following sections for more information on the hardware requirements for the Healthcare Forms Manager:

- For 64-bit server-side hardware requirements, see [64-Bit Server Hardware Requirements on page 13](#).
- For 32-bit server-side hardware requirements, see [32-Bit Server Hardware Requirements on page 12](#).
- For client-side hardware requirements, see [Web Client Hardware Requirements on page 17](#).



## Overview

The following sections outline requirements information specific to the HL7 module in OnBase Foundation EP5. For general requirements information that applies to both HL7 and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for HL7:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [OnBase Client Hardware Requirements on page 15](#).

## HL7 Message Transport Protocol

HL7 messages sent to OnBase must be sent using Minimal Lower Layer Protocol (MLLP), a common HL7 transport protocol that uses TCP/IP.

HL7 messages sent by OnBase also use MLLP formatting. Because this behavior is not configurable, ensure your export destinations are able to receive and process messages using MLLP.

## Overview

The following sections outline requirements information specific to Host Enabler in OnBase Foundation EP5. For general requirements information that applies to both Host Enabler and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Host Enabler:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Host Enabler:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

For more information on the hardware requirements for using Host Enabler with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to Hyland Office Products Installers in OnBase Foundation EP5. For general requirements information that applies to both Hyland Office Products Installers and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Office Business Application for 2019:

- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements for the Application and Web Servers, see [Server C++ Requirements on page 12](#).

## User Permissions

You must be logged on to the installation machine with administrator privileges in order to use the Hyland Office Products installer.

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**Note:** The Hyland Office Products installer must be run with elevated administrator privileges, even if the user currently logged in is an administrator.

---

If you are installing a deployment package to be delivered to a client workstation using ClickOnce, any user on the client workstation can install the deployed package as long as they have sufficient rights to access the package on the deployment server.

## Client Machine

**Microsoft Visual Studio 2010 Tools for Office Runtime** must be installed on client machines prior to deployment. **Microsoft Visual Studio 2010 Tools for Office Runtime** can be obtained from the Microsoft Download Center at <http://www.microsoft.com/downloads>. The x86 version is required for 32-bit versions of Windows; the x64 version is required for 64-bit versions of Windows.

---

**Note:** **Microsoft Visual Studio 2010 Tools for Office Runtime** can also be installed by the **Hyland Office Integration Dependencies** installer for ClickOnce deployments, or by using setup.exe to run the MSI installer for the Office Business Application module.

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## Overview

The following sections outline requirements information specific to IA Connect in OnBase Foundation EP5. For general requirements information that applies to both IA Connect and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Required Modules

The following OnBase modules are required for IAConnect:

- Application Server
- Client
- Report Services
- Single Sign-On for Microsoft Active Directory Service
- Unity Client
- Web Client
- Web Server
- Workflow
- Workflow Approval Management
- Hyland IdP

## Costpoint Versions Supported

- Costpoint 7.1
- Costpoint 7.1.1
- Costpoint 8.0

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**Caution:** Other minor versions of Costpoint have not been tested with IAConnect. Performing acceptance testing is recommended before deploying in a production environment.

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## Client Limitations

The following ad hoc tasks are not supported in the OnBase Client. The Unity Client is required to use these ad hoc tasks.

Workflow Queue	Ad Hoc Tasks
AP Initial Review Queue	<ul style="list-style-type: none"><li>• Assign 1st Level Approvers</li><li>• Manually Assign Route/Approvers</li></ul>
Approvals Admin Queue	<ul style="list-style-type: none"><li>• Manually Assign Route/Approvers</li></ul>
Supervisor Queue	<ul style="list-style-type: none"><li>• Assign 1st Level Approvers</li><li>• Manually Assign Route/Approvers</li></ul>

## Overview

The following sections outline requirements information specific to the IHE Solutions module in OnBase Foundation EP5. For general requirements information that applies to both IHE and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for IHE:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [OnBase Client Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to Image Forms in OnBase Foundation EP5. For general requirements information that applies to both Unity Forms and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Databases Supported on page 7](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Image Forms:

- For information on the supported desktop operating systems, see the Unity Client table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Server and Core Services Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#).

## Web Browser Requirements

Fully supported browsers for 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 on Chromium 89 and greater
- Google Chrome 89 and greater
- Mozilla Firefox 87 and greater
- Apple Safari 14.0 and greater

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





## Overview

The following sections outline requirements information specific to Image Statements in OnBase Foundation EP5. For general requirements information that applies to both Image Statements and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Image Statements:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

If you are setting up a processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to the Integrated Office Viewer in OnBase Foundation EP5. For general requirements information that applies to both the Integrated Office Viewer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Office Business Application for 2019:

- For information on the Microsoft Visual C++ requirements for the Application and Web Servers, see [Server C++ Requirements on page 12](#).

## Integrated Office Viewer Requirements

To use the Module Name, it is required to configure the WOPI endpoint in the Application Server's web.config file. To configure the WOPI endpoint, you must have:

- A functioning Microsoft Office environment, consisting of one of the following:
  - Microsoft Office Online Server farm
  - Microsoft Office for the web (Office 365)
- A functioning OnBase Application Server
  - The same Application Server needs **Anonymous Authentication** enabled

Additionally, if you are integrating with Microsoft Office for the web (Office 365), you must register your solution with Hyland Software and receive a tenant ID code, which is needed to enable Hyland Broker for Microsoft Office settings. For more information on registering your solution, contact your first line of support.

To install the OnBase Application Server, see the **Application Server** module reference guide. Information on installation and configuration of the Microsoft Office servers or subscriptions is available from Microsoft.

## Supported File Types with the Integrated Office Viewer

To view and edit some of the supported document types in OnBase using the OnBase Integrated Office Viewer, the OnBase WOPI endpoint must be configured to integrate with the Microsoft Office Online Server or Office for the web.

This table shows the file-access level for OpenDocument and Microsoft Office documents that are displayed in the OnBase Integrated Office Viewer in the OnBase clients.

File Type	Microsoft Office Online Server or Office for the web
<b>Microsoft Excel</b>	
<b>ods</b>	view and edit
<b>xls</b>	read-only
<b>xlsb</b>	read-only
<b>xlsm</b>	read-only
<b>xlsx</b>	view and edit
<b>Microsoft PowerPoint</b>	
<b>odp</b>	view and edit
<b>pot</b>	read-only
<b>potm</b>	read-only
<b>potx</b>	read-only
<b>pps</b>	read-only
<b>ppsm</b>	read-only
<b>ppsx</b>	read-only
<b>ppt</b>	read-only
<b>pptm</b>	read-only
<b>pptx</b>	view and edit
<b>Microsoft Word</b>	
<b>doc</b>	read-only

File Type	Microsoft Office Online Server or Office for the web
<b>docm</b>	read-only
<b>docx</b>	view and edit
<b>dot</b>	read-only
<b>dotm</b>	read-only
<b>dotx</b>	read-only
<b>odt</b>	view and edit

## Overview

The following requirements information is specific to Integration for 3M CAC in OnBase Foundation EP5.

Integration for 3M CAC also requires the OnBase Application Server and the OnBase HL7 Module. For requirements information that applies to these modules and others, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Third-Party Software Requirements

Integration for 3M CAC requires the 3M 360 Encompass System (July 2013 SP2 or higher).

Contact your 3M support team to ensure your 3M 360 Encompass solution meets the requirements for the Integration for 3M CAC.

## Overview

The following sections outline requirements information specific to Accela in OnBase Foundation EP5. For general requirements information that applies to both Accela and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Accela:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Third-Party Software Requirements

Accela Automation is required to use the Integration for Accela Automation.

## Overview

The following sections outline requirements information specific to the Integration for Adobe Sign in OnBase Foundation EP5. For general requirements information that applies to both Integration for Adobe Sign and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Integration for Adobe Sign:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## .NET Core Requirements

The Integration for Adobe Sign requires the Microsoft .NET Core 3.1 Runtime and Hosting Bundle.

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**Note:** The .NET Core Runtime and Hosting bundle must be installed prior to installing the Module Name.

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The .NET Core Runtime and Hosting Bundle is a Microsoft product. For installation and configuration procedures, see Microsoft's .NET Core documentation.



# INTEGRATION FOR AZTECA CITYWORKS SERVER

## Overview

The following sections outline requirements information specific to the Integration for Azteca Cityworks Server in OnBase Foundation EP5. For general requirements information that applies to both the Integration for Azteca Cityworks Server and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Integration for Azteca Cityworks Server:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for more information on the Web browser requirements for the Integration for Azteca Cityworks Server.

## Hardware Requirements

See [Server and Core Services Hardware Requirements on page 17](#) for more information on the hardware requirements for the Integration for Azteca Cityworks Server.

## Third Party Software Requirements

The Integration for Cityworks Server requires the following third party software:

- Esri ArcGIS for Desktop Advanced, ArcGIS for Desktop Standard, ArcGIS for Desktop Basic, ArcInfo, ArcView, or ArcEditor version 9.3.1 to 10.0 SP1
- Cityworks 14

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**Note:** The Integration for Cityworks Server is supported for use with the **Office** mode of Cityworks. It is not supported for use in the **Field** or **Respond** modes.

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## Overview

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**Caution:** In order for the Integration for Biscom FAXCOM to correctly import faxes, the Fax Connector Service must write a status note to the **Notes** field on the FAXCOM server. This means that all existing data in the **Notes** field will be overwritten when the Fax Connector Service polls for faxes to import. It also means that if the **Notes** field is altered after the Integration for FAXCOM is installed and running, previously archived faxes may be archived again by the service.

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The following sections outline requirements information specific to Integration for Biscom FAXCOM in OnBase Foundation EP5. For general requirements information that applies to both Integration for Biscom FAXCOM and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Overview

The following sections outline requirements information specific to the Integration for Corelation Inc. KeyStone in OnBase Foundation EP5. For general requirements information that applies to both the Integration for Corelation Inc. KeyStone and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Integration for Corelation Inc. KeyStone:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for more information on the Web browser requirements for the Integration for Corelation Inc. KeyStone.

## Hardware Requirements

See [Server and Core Services Hardware Requirements on page 17](#) for more information on the hardware requirements for the Integration for Corelation Inc. KeyStone.

## Authentication Requirements

The Integration for Corelation Inc. KeyStone requires a standard OnBase account to authenticate to OnBase through the connector.

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**Note:** LDAP and AD Authentication is also supported through the integration. In order to use LDAP or AD Authentication, the client-side component of Corelation's software must be exposed to allow this type of authentication.

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## Overview

The following sections outline requirements information specific to Integration for D+H Phoenix in OnBase Foundation EP5. For general requirements information that applies to both Integration for D+H Phoenix and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for D+H Phoenix:

- For information on the supported desktop operating systems, see the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Integration for D+H Phoenix:

- For information on the hardware requirements for retrieving documents in the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- For information on the hardware requirements for Integration for D+H Phoenix processing, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Third-Party Software Requirements

To use the Document Storage component, client workstations must contain Adobe Reader, Adobe Acrobat Standard, or Adobe Acrobat Professional, version 8 or greater.

## Overview

The following sections outline requirements information specific to the Integration for DocuSign eSignature in OnBase Foundation EP5. For general requirements information that applies to both the Integration for DocuSign eSignature and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Integration for DocuSign eSignature:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for more information on the Web browser requirements for the Integration for DocuSign eSignature.

## Hardware Requirements

See the following sections for more information on the hardware requirements for the Integration for DocuSign eSignature:

- If you are using the Integration for DocuSign eSignature with the OnBase Client, see [OnBase Client Hardware Requirements on page 15](#).
- If you are using the Integration for DocuSign eSignature with the Unity Client, see [Server and Core Services Hardware Requirements on page 17](#).

## Third-Party Software

The Integration for DocuSign eSignature requires a DocuSign eSignature solution.



## Overview

The following requirements information is specific to Integration for Dolby CAC in OnBase Foundation EP5.

Integration for Dolby CAC also requires the OnBase Application Server and the OnBase HL7 Module. For requirements information that applies to these modules and others, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Third-Party Software Requirements

Integration for Dolby CAC requires Dolby® Fusion CAC.

Contact your Dolby support team to ensure your Fusion CAC solution meets the requirements for Integration for Dolby CAC.

## Overview

The following sections outline requirements information specific to the Integration for eCopy ShareScan in OnBase Foundation EP5. For general requirements information that applies to both the Integration for eCopy ShareScan and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

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**Note:** Unless otherwise noted, the following requirements apply to both the 32-bit and 64-bit versions of the Application Server, which is required by the Integration for eCopy ShareScan.

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## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for the Integration for eCopy ShareScan:

- For information on supported server operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for the Application Server, which is required by the Integration for eCopy ShareScan:

- For 32-bit Application Server hardware requirements, see [32-Bit Server Hardware Requirements on page 17](#).
- For 64-bit Application Server hardware requirements, see [64-Bit Server Hardware Requirements on page 18](#).

## eCopy ShareScan Requirements

The Integration for eCopy ShareScan is for use only with eCopy ShareScan version 5.0, 5.1, 5.2, 5.4 or 6.1.

For information on the hardware and software requirements for the server hosting the eCopy ShareScan Administrative Console, or for information on the hardware and software requirements for your MFP devices, contact your eCopy ShareScan solution provider.

## Overview

The following sections outline requirements information specific to Integration for Epic in OnBase Foundation EP5. For general requirements information that applies to both Integration for Epic and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Integration for Epic:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

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**Note:** The OnBase Client and Configuration modules require an ODBC connection to the OnBase database.

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## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Epic:

- For information on the supported desktop operating systems, see the **Web/ Application Server, Unity Client, and OnBase Client** table columns in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

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**Note:** This requirement applies to the following integration components: OnBase Application Server, OnBase Viewer (client workstations), Epic ROI (print server), EpicCare Link (server and clients).

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- For information on Microsoft Visual C++ requirements for the Application/Web server, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#) for information on the Application Server browser requirements.

## Hardware Requirements

See the following sections for more information on the hardware requirements for Integration for Epic:

- For information on OnBase Client scanning workstation hardware requirements, see [Client Scanning Workstation Hardware Requirements on page 17](#).
- For information on 32-Bit server hardware requirements, see [32-Bit Server Hardware Requirements on page 17](#).

## Overview

The following sections outline requirements information specific to the OnBase Mobile Healthcare app in OnBase Foundation EP5, where the OnBase Mobile Healthcare app is configured to integrate with Epic.

For general requirements information that applies to both the Mobile Healthcare app and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

### Android OS

Android OS version 5.0 or greater is required in order to use the OnBase Mobile Healthcare app.

The OnBase Mobile Healthcare app is supported for use on Android tablets and phones. Clinical Consents functionality is only supported on Android tablets.

For best performance, devices used with the OnBase Mobile Healthcare app should have a minimum diagonal screen measurement of 10 inches.

### iOS

The OnBase Mobile Healthcare app is supported for use on iPhones and iPads. Clinical Consents functionality is only supported on iPads.

### iOS Version Support Statement

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 Foundation EP5, OnBase Mobile Access and Mobile Healthcare applications are supported on iOS version 14.4.2.

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 14.

## 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 Hyland Community (<https://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 Hyland Community at <https://www.onbase.com/community> or contact your first line of support.

## Server Requirements

The OnBase Mobile Healthcare app requires a Mobile Applications Broker Server and Application Server.

## Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.

## Third-Party Software Requirements

Integration for Epic Canto and Epic Haiku requires the Epic Canto and Epic Haiku apps by Epic Systems.



## Overview

The following sections outline requirements information specific to Integration for Epic MyChart in OnBase Foundation EP5. For general requirements information that applies to both Integration for Epic MyChart and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Epic MyChart:

- For information on the supported server operating systems, see the **Web/Application Server** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Application Server Requirements

Integration for Epic MyChart requires a dedicated 64-bit OnBase Application Server. The integration is not supported with the 32-bit OnBase Application Server.

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**Note:** If the OnBase Application Server is installed on a Windows Server Core operating system, then the Server Core App Compatibility Feature on Demand (FOD) must be installed. For information about the Server Core App Compatibility FOD, see the Microsoft Windows Server documentation.

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## Web Server Requirements

Integration for Epic MyChart requires a dedicated OnBase Web Server. To allow Unity Forms to be viewed, the OnBase Web Server and the Patient Portal Link (PPL) application must be installed on the same domain.

## Web Browser Requirements

Integration for Epic MyChart is supported on the following browsers:

- Google Chrome 89 or greater
- Microsoft Edge on Chromium 89 or greater
- Microsoft Internet Explorer 11 (IE 11) with compatibility view disabled
- Mozilla Firefox 87 or greater
- Mozilla Firefox Extended Support Release (ESR) 78 or greater
- Safari 14.0 or greater, with the exceptions of full screen mode and Safari Reader

## Mobile Phone Limitation

Integration for Epic MyChart does not support the signing of third-party forms on mobile phones. Third-party forms can be signed on other mobile devices and desktop computers.

Unity Forms and Image Forms can be signed on any device supported by MyChart.

## Third-Party Software Requirements

Integration for Epic MyChart requires Epic 2017 or later. End users can access the integration using the MyChart web or mobile application. Epic and MyChart are registered trademarks or trademarks of Epic Systems Corporation in the United States and/or in other countries.

## Integration for Epic Requirements

Integration for Epic MyChart requires the Integration for Epic module. The following must be configured as described in the **Integration for Epic** module reference guide:

- The **ALL EPIC USERS** User Group
- Authentication credentials
- Encryption settings

The following sections outline requirements information specific to Integration for Esker Fax in OnBase Foundation EP5. For general requirements information that applies to both Integration for Esker Fax and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Supported Esker Fax Version

Integration for Esker Fax supports Esker Fax version 5.0 and above, including the Esker Fax OnDemand service.

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**Note:** The connection to the fax server must be made using the full URL to the web services endpoint for both hosted and premise-based solutions.

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## Overview

The following sections outline requirements information specific to the Integration for Esri in OnBase Foundation EP5. For general requirements information that applies to both the Integration for Esri and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Integration for Esri:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for more information on the Web browser requirements for the Integration for Esri.

## Hardware Requirements

See [Server and Core Services Hardware Requirements on page 17](#) for more information on the hardware requirements for the Integration for Esri.

## Overview

The following sections outline requirements information specific to the Integration for Esri ArcGIS Desktop in OnBase Foundation EP5. For general requirements information that applies to both the Integration for Esri ArcGIS Desktop and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Integration for Esri ArcGIS Desktop:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for more information on the Web browser requirements for the Integration for Esri ArcGIS Desktop.

## Hardware Requirements

See [Server and Core Services Hardware Requirements on page 17](#) for more information on the hardware requirements for the Integration for Esri ArcGIS Desktop.

## ASP.NET MVC Framework Requirements

This module requires the ASP.NET MVC 4 framework. The ASP.NET MVC framework can be obtained from <http://www.asp.net/downloads>.

## Third Party Software Requirements

An Esri ArcGIS desktop product is required. You must have ArcGIS for Desktop Advanced, ArcGIS for Desktop Standard, ArcGIS for Desktop Basic, Esri ArcInfo, ArcView, or ArcEditor version 10.0 SP2 in order to use the Integration for Esri ArcGIS Desktop.

## Overview

The following sections outline requirements information specific to Integration for Guidewire InsuranceSuite in OnBase Foundation EP5. For general requirements information that applies to both Integration for Guidewire InsuranceSuite and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Prerequisites

The Integration for Guidewire InsuranceSuite requires the OnBase Web Server. See the Web Server chapter in the **Installation Requirements** manual for information on requirements for the Web Server. See the Web Server module reference guide for details on installing the OnBase Web Server.

## Miscellaneous Requirements

### Installing ActiveX Controls with UAC Enabled

When ActiveX controls are deployed through the Web browser on a system with UAC enabled, the user is prompted to install each control asking **Do you want to allow the following program to make changes to this computer?**

The prompt is displayed the first time each ActiveX control is needed. Users who are logged on as administrators can click **Yes** to install the specified ActiveX control. Once the control is installed, the user is not prompted again for that control.

If the user is logged on as a standard user rather than an administrator, then an administrator must provide his or her credentials before the control can be installed. To avoid this scenario, deploy the Web ActiveX controls using the Hyland Web ActiveX Controls installer.

## Third-Party Software Requirements

The Integration for Guidewire InsuranceSuite is supported for use with the following third party software products:

- Guidewire BillingCenter versions 8 and 9
- Guidewire ClaimCenter versions 8 and 9
- Guidewire PolicyCenter versions 8 and 9
- Guidewire Gateway Portal for Agents versions 4 and 5





## Overview

The following sections outline requirements information specific to the Integration for HP Connect in OnBase Foundation EP5. For general requirements information that applies to both the Integration for HP Connect and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for the Integration for HP Connect:

- For information on supported server operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#).

## Hardware Requirements

See [64-Bit Server Hardware Requirements on page 18](#).

## HP Device Requirements

To use the Integration for HP Connect, your HP device must be OXPd1.6 API-enabled and it must be equipped with a network interface card or wireless network access.

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**Note:** To ensure that your HP device meets all requirements to run the Integration for HP Connect, contact your hardware provider.

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## Overview

The following sections outline requirements information specific to Integration for Jack Henry jXchange in OnBase Foundation EP5. For general requirements information that applies to both Integration for Jack Henry jXchange and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Data Source Connections

When you install the Integration for Jack Henry jXchange, you must configure the ADO.NET connection string to connect the Integration for Jack Henry jXchange to the OnBase database.

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Jack Henry jXchange:

- For information on the supported desktop operating systems, see the **Web/ Application Server** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#).

## Hardware Requirements

See [32-Bit Server Hardware Requirements on page 17](#).

## Third-Party Software Requirements

To use the Integration for Jack Henry jXchange, Jack Henry jXchange must be installed on the server, and the Jack Henry products used to interact with OnBase must be installed on client workstations.

# INTEGRATION FOR MEDICAL IMAGING VIEWER (AGFA)

## Overview

The following sections outline requirements information specific to Integration for Medical Imaging Viewer (Agfa) in OnBase Foundation EP5. For general requirements information that applies to both Integration for Medical Imaging Viewer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Medical Imaging Viewer:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, Web Client or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Integration for Medical Imaging Viewer:

- If you are using this integration with OnBase Patient Window, see [Patient Window on page 269](#).
- If you are using this integration with the OnBase Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using this integration with the Unity Client or Medical Records Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Third-Party Software Requirements

The Integration for Medical Imaging Viewer (Agfa) requires ICIS™ View (version 3 or later) by Agfa HealthCare. For information about ICIS View requirements and installation, refer to the ICIS View documentation.

# INTEGRATION FOR MEDICAL IMAGING VIEWER (CALGARY SCIENTIFIC)

## Overview

The following sections outline requirements information specific to Integration for Medical Imaging Viewer (Calgary Scientific) in OnBase Foundation EP5. For general requirements information that applies to both Integration for Medical Imaging Viewer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Medical Imaging Viewer:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, Web Client or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Integration for Medical Imaging Viewer:

- If you are using this integration with OnBase Patient Window, see [Patient Window on page 269](#).
- If you are using this integration with the OnBase Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using this integration with the Unity Client or Medical Records Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Third-Party Software Requirements

Integration for Medical Imaging Viewer (Calgary Scientific) requires one of the following versions of the Calgary Scientific ResolutionMD® application:

- 6
- 5.1
- 4.3

For information about ResolutionMD requirements, installation, and setup, please refer to the documentation for ResolutionMD administration.

## FIPS Limitation

The OnBase Application Server used with the ResolutionMD integration must not be installed on a server with FIPS mode enabled. If the integration uses the federated search feature, then FIPS mode must not be enabled on the servers running either the Application Server or the OnBase Client with the -HL7DICOMPROCESSOR command line switch.



# INTEGRATION FOR MEDICAL IMAGING VIEWER (MERGE)

## Overview

The following sections outline requirements information specific to Integration for Medical Imaging Viewer (Merge) in OnBase Foundation EP5. For general requirements information that applies to both Integration for Medical Imaging Viewer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Medical Imaging Viewer:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, Web Client or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Integration for Medical Imaging Viewer:

- If you are using this integration with OnBase Patient Window, see [Patient Window on page 269](#).
- If you are using this integration with the OnBase Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using this integration with the Unity Client or Medical Records Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Third-Party Software Requirements

Integration for Medical Imaging Viewer (Merge) requires Merge iConnect<sup>®</sup> Access (version 4.1.1 or later). For information about iConnect Access requirements and installation, refer to the iConnect Access documentation.

# INTEGRATION FOR MEDICAL IMAGING VIEWER (TERARECON)

## Overview

The following sections outline requirements information specific to Integration for Medical Imaging Viewer (TeraRecon) in OnBase Foundation EP5. For general requirements information that applies to both Integration for Medical Imaging Viewer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Medical Imaging Viewer:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, Web Client or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Integration for Medical Imaging Viewer:

- If you are using this integration with OnBase Patient Window, see [Patient Window on page 269](#).
- If you are using this integration with the OnBase Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using this integration with the Unity Client or Medical Records Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Third-Party Software Requirements

Integration for Medical Imaging Viewer (TeraRecon) requires iNtuition EMV (iEMV).<sup>1</sup> For iEMV requirements and installation information, refer to the iEMV documentation.

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1. TeraRecon, AquariusNet, and iNtuition are either registered trademarks or trademarks of TeraRecon, Inc. in the United States and/or other countries.

# INTEGRATION FOR MEDICAL IMAGING VIEWER (VITAL IMAGES)

## Overview

The following sections outline requirements information specific to Integration for Medical Imaging Viewer (Vital Images) in OnBase Foundation EP5. For general requirements information that applies to both Integration for Medical Imaging Viewer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Medical Imaging Viewer:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, Web Client or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Integration for Medical Imaging Viewer:

- If you are using this integration with OnBase Patient Window, see [Patient Window on page 269](#).
- If you are using this integration with the OnBase Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using this integration with the Unity Client or Medical Records Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Third-Party Software Requirements

Integration for Medical Imaging Viewer (Vital Images) requires VitreaView<sup>1</sup> version 6.5.9 or later and a compatible version of VioStream<sup>2</sup>. For VitreaView requirements and installation information, refer to the documentation for VitreaView.

## FIPS Limitation

The OnBase Application Server used with Integration for Medical Imaging Viewer (Vital Images) must not be installed on a server with FIPS mode enabled.

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1. VitreaView is a registered trademark of Vital Images, Inc.

2. VioStream is a trademark of Vital Images, Inc.

## Overview

The following sections outline requirements information specific to Integration for Microsoft Outlook 2019 in OnBase Foundation EP5. For general requirements information that applies to both Integration for Microsoft Outlook 2019 and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

For general requirements information on the Hyland Office Products Installers, see [Hyland Office Products Installers on page 162](#).

## Database Requirements

See the following sections for more information on the database requirements for Integration for Microsoft Outlook 2019:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Microsoft Outlook 2019:

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements for the Application and Web Servers, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for information on browser requirements for the Unity Client.

## Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#) for information on hardware requirements for the Unity Client.

## Third-Party Software

You must have Microsoft Outlook 2019 in order to use Integration for Microsoft Outlook 2019. The latest service pack is also required.

## Microsoft Office 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. While OnBase modules that integrate with Microsoft Office applications can be used with the 64-bit versions of these applications, the 32-bit versions of these Microsoft Office applications are recommended for the OnBase integrations. Consult the Microsoft Office Support Statement for your version of Microsoft Office in the [Hyland Office Products Installers](#) chapter of this module reference guide for complete details on the limitations to using a 64-bit version of these applications.

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

## Hyland Software - Microsoft Service Pack Statement

The developers of OnBase are dedicated to ensuring the monthly cumulative updates released by Microsoft® are compatible with OnBase. On the second Tuesday of each month, the Quality Assurance Department of Hyland Software evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase and installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.



## Overview

The following sections outline requirements information specific to Integration for Microsoft Search in OnBase Foundation EP5. For general requirements information that applies to both Integration for Microsoft Search and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

See [Microsoft .NET Framework Requirements on page 11](#) for information on the Microsoft .NET Framework requirements.

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**Note:** The version of the Microsoft .NET Framework must be installed on the SharePoint server.

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## Third-Party Requirements

To use Integration for Microsoft Search, you must have one of the following Microsoft products installed:

- Microsoft SharePoint Server 2013
- Microsoft SharePoint Server 2016

## Load Balancing

This module supports load balancing across multiple Web Servers and Application Servers. Load balancers must support either IP-based or cookie-based load balancing (also referred to as layer-3, layer-4, and layer-7 load balancing). Load balancers also must be configured to use persistent session (or sticky session) load balancing. For information about configuring your load balancer, refer to its documentation. For information about configuring OnBase modules for load balancing, refer to the Web Server module reference guide.

## Crawling and Load Balancing

The Integration for Microsoft Search does not support load balancing across multiple Application Servers for the purpose of crawling documents. The server performing the crawl cannot communicate with the Application Server through a load balancer.

## Overview

The following sections outline requirements information specific to Integration for Netsmart Homecare in OnBase Foundation EP5. For general requirements information that applies to both Integration for Netsmart Homecare and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Integration for Netsmart Homecare:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Integration for Netsmart Homecare:

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Microsoft Visual C++ Requirements

One or more versions of the Microsoft Visual C++ Redistributable Package are required. If not already present on your system, the required packages are installed when the **setup.exe** installer is used to install this module.

Each workstation where the module will be installed requires the following Microsoft Visual C++ Redistributable Packages:

- Microsoft Visual C++ 2005 Redistributable Package (x86)
- Microsoft Visual C++ 2012 Redistributable Package (x86/x64)
- Microsoft Visual C++ 2019 Redistributable Package (x86/x64)

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

### Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for information on Unity Client web browser requirements.

## Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#) for information on Unity Client hardware requirements.

## Digital Input Device Compatibility

Digital input devices, such as scanners and digital cameras, can use the Windows Image Acquisition (WIA) driver model. Depending on the module being used, devices that use TWAIN, Kofax, or ISIS can also be used.

To use Windows Image Acquisition (WIA) digital input devices to acquire images, the WIA Windows service must be configured with an **Automatic** or **Manual** Startup Type. For more information on WIA, including a complete list of devices compatible with WIA, see <http://www.microsoft.com>.

For more information on the TWAIN standard for image acquisition devices, see <http://www.twain.org>.

## SQL Server Compact 3.5

Each workstation where the module will be installed requires Microsoft SQL Server Compact 3.5 SP1 (or later service pack). Microsoft SQL Server Compact 3.5 SP1 is automatically installed when running the module installer. It is also automatically installed when installing the Unity Client.

The module uses SQL Server Compact for your workstation's database. This database is limited to 4 GB.

## Third-Party Software Requirements

Version 6.1 or a later version of the Netsmart Homecare application is the only third-party software required to use the Integration for Netsmart Homecare.

The Netsmart **Can Synchronize Netsmart AllDocs** and **Netsmart AllDocs** privileges must be set to **Allow**.

## Overview

The following requirements information is specific to Integration for Nuance CAC in OnBase Foundation EP5.

Integration for Nuance CAC also requires the OnBase Application Server and the OnBase HL7 Module. For requirements information that applies to these modules and others, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Third-Party Software Requirements

Integration for Nuance CAC requires Nuance® Clintegrity 360™ | Computer-Assisted Coding (version 14.1 or later).

Contact your Nuance support team to ensure your Nuance Clintegrity solution meets the requirements for Integration for Nuance CAC.

# INTEGRATION FOR OPEN TEXT FAX SERVER, RIGHTFAX EDITION

The following sections outline requirements information specific to Integration for Open Text Fax Server, RightFax Edition in OnBase Foundation EP5. For general requirements information that applies to both Integration for Open Text Fax Server, RightFax Edition and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Third-Party Software Requirements

Versions 16.4, 16.6, and 20.2 of the RightFax Server are supported with OnBase Foundation EP5.

## Overview

The following requirements information is specific to Integration for Optum CAC in OnBase Foundation EP5.

Integration for Optum CAC also requires the OnBase Application Server and the OnBase HL7 Module. For requirements information that applies to these modules and others, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Third-Party Software Requirements

Integration for Optum CAC requires the following third-party software:

- Optum® CAC Image Service Server
- Optum® Enterprise CAC

Contact your Optum support team to ensure your Optum CAC solution meets the requirements for Integration for Optum CAC.

## Overview

The following sections outline requirements information specific to the Integration for Symitar Episys in OnBase Foundation EP5. For general requirements information that applies to both the Integration for Symitar Episys and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Integration for Symitar Episys:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for more information on the Web browser requirements for the Integration for Symitar Episys.

## Hardware Requirements

See [Server and Core Services Hardware Requirements on page 17](#) for more information on the hardware requirements for the Integration for Symitar Episys.



## Authentication Requirements

The Integration for Symitar Episys requires a standard OnBase account to authenticate to OnBase through the connector.

---

**Note:** LDAP and AD Authentication is also supported through the integration. In order to use LDAP or AD Authentication, the client-side component of Symitar's software must be exposed to allow this type of authentication.

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# INTEGRATION FOR TEMPEST DEVELOPMENT GROUP

## Overview

The following sections outline requirements information specific to the Integration for Tempest Development Group in OnBase Foundation EP5. For general requirements information that applies to both the Integration for Tempest Development Group and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Integration for Tempest Development Group:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for more information on the Web browser requirements for the Integration for Tempest Development Group.

## Hardware Requirements

See [Server and Core Services Hardware Requirements on page 17](#) for more information on the hardware requirements for the Integration for Tempest Development Group.

## Authentication Requirements

The Integration for Tempest Development Group requires a standard OnBase account to authenticate to OnBase through the connector.

---

**Note:** LDAP and AD Authentication is also supported through the integration. In order to use LDAP or AD Authentication, the client-side component of Tempest's software must be exposed to allow this type of authentication.

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## Overview

The following sections outline requirements information specific to Intelligent Capture for AP in OnBase Foundation EP5. For general requirements information that applies to both Intelligent Capture for AP and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## General Operating System Requirements

See the following sections for more information on the operating system requirements for Intelligent Capture for AP:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the supported desktop operating systems for a workstation running the Data Capture Server Windows Service, see [OCR Processing Workstation Supported Operating Systems on page 227](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## OCR Processing Workstation Supported Operating Systems

- Windows 8.1
- Windows Server 2012 R2
- Windows 10
- Windows Server 2016
- Windows Server 2019
- Windows Server 2019 Server Core
- Windows Server 20H2 Server Core

## Web Browser Requirements

If you are using Intelligent Capture for AP with the Unity Client, [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Intelligent Capture for AP:

- If you are setting up the host for the Data Capture Server Windows Service, see [OCR Processing Workstation Hardware Requirements on page 13](#).
- If you are using Intelligent Capture for AP with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).

## Overview

The following sections outline requirements information specific to Interaction with ShareBase in OnBase Foundation EP5. For general requirements information that applies to both Interaction with ShareBase and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the ShareBase Monitor service:

- For information on the supported server operating systems, see the **Web/Application Server** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Server and Core Services Hardware Requirements

See the following sections for more information on the hardware requirements for the ShareBase Monitor service:

- For 32-bit server hardware requirements, see [32-Bit Server Hardware Requirements on page 17](#).
- For 64-bit server hardware requirements, see [64-Bit Server Hardware Requirements on page 18](#).

OnBase Studio is required to configure Interaction with ShareBase. For Studio hardware requirements, see [64-Bit Studio Hardware Requirements on page 21](#).

## Load Balancer Limitation

The ShareBase Monitor service cannot communicate with OnBase through a load balancer. The configuration file for the ShareBase Monitor service must point to a single OnBase Application Server.

## Overview

The following sections outline requirements information specific to Interactive Data Capture in OnBase Foundation EP5. For general requirements information that applies to both Interactive Data Capture and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Interactive Data Capture:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Interactive Data Capture:

- If you are using Interactive Data Capture with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- If you are using Interactive Data Capture with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).



## Overview

The following sections outline requirements information specific to Keyword Update in OnBase Foundation EP5. For general requirements information that applies to both Keyword Update and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Keyword Update:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Processing Workstation Minimum Hardware Requirements on page 16](#).

# Miscellaneous Requirements

## Authenticode Signature Verification

The OnBase Client and Configuration modules each require an additional configuration file to complete a successful installation: **obclnt32.exe.config** and **obcfg32.exe.config**, for use with the OnBase Client and Configuration module, respectively. These files are necessary under the .NET Framework to enable or disable a check of the Authenticode signatures applied to the OnBase executables. Authenticode is a Microsoft technology that uses digital certificates to identify the publisher of an application to ensure the application's integrity and to verify that the software has not been infected by any malware since it was created.

These files are located in the same directory as the OnBase Client and Configuration module executables and are installed automatically by the Client Installer. Signature verification is disabled by default for both executables. For more information on this topic, see: <http://support.microsoft.com/kb/936707>.

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**Note:** If you are running the OnBase Client or Configuration module via a UNC connection, and trust is set to verify by publisher, then Authenticode signature verification must be enabled. If trust is set to verify by UNC path, signature verification does not have to be enabled.

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## Enabling Authenticode Signature Verification

Locate the **obclnt32.exe.config** file for the OnBase Client or the **obcfg32.exe.config** file for the Configuration module. To enable signature verification:

1. Open the file for editing in a plain-text editor, such as Notepad.
2. Locate the **generatePublisherEvidence** element.
3. Change the **enabled** attribute to **true**:  
`<generatePublisherEvidence enabled="true"/>`
4. Save and close the file.

---

**Note:** If the machine running the executables does not have Internet access, or the speed of the network to which it is connected is slow, it could take a noticeably long time to perform this check, causing the application to take longer to launch.

---

## Disabling Authenticode Signature Verification

Locate the **obclnt32.exe.config** file for the OnBase Client or the **obcfg32.exe.config** file for the Configuration module. To disable signature verification:

1. Open the file for editing in a plain-text editor, such as Notepad.
2. Locate the **generatePublisherEvidence** element.

3. Change the **enabled** attribute to **false**:  
    <generatePublisherEvidence enabled="false"/>
4. Save and close the file.

## Overview

The following sections outline requirements information specific to LOB Broker in OnBase Foundation EP5. For general requirements information that applies to both LOB Broker and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Microsoft .NET Framework Requirements

For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for LOB Broker:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)

## Overview

The following sections outline requirements information specific to the Mailbox Importer in OnBase Foundation EP5. For general requirements information that applies to both the Mailbox Importer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on operating system requirements for the Mailbox Importer:

- For information on supported server operating systems, see [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to Media Server in OnBase Foundation EP5. For general requirements information that applies to both Media Server and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Media Server:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Web Browser Requirements on page 13](#) for more information.

## Overview

The following sections outline requirements information specific to Medical Imaging Viewer - NilRead in OnBase Foundation EP5. For general requirements information that applies to both Medical Imaging Viewer and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Medical Imaging Viewer - NilRead:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, Web Client or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Medical Imaging Viewer:

- If you are using Medical Imaging Viewer with OnBase Patient Window, see [Patient Window on page 269](#).
- If you are using Medical Imaging Viewer with the OnBase Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using Medical Imaging Viewer with the Unity Client or Medical Records Unity Client, see [Unity Client Browser Requirements on page 14](#).

## NilRead Software Requirements

Medical Imaging Viewer - NilRead requires NilRead version 4.2.28.92907 or later. For information about NilRead requirements, please see the documentation for NilRead administration.



## Overview

The following sections outline requirements information specific to Medical Records Unity Client in OnBase Foundation EP5. For general requirements information that applies to both Medical Records Unity Client and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Medical Records Unity Client:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Medical Records Unity Client:

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for information on Unity Client web browser requirements.

## Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#) for information on Unity Client hardware requirements.

## Microsoft Visual C++ Requirements

One or more versions of the Microsoft Visual C++ Redistributable Package are required. If not already present on your system, the required packages are installed when the **setup.exe** installer is used to install this module.

Workstations running the Medical Records Unity Client require the following:

- Microsoft Visual C++ 2010 Redistributable Package (x86)
- Microsoft Visual C++ 2013 Redistributable Package (x86)
- Microsoft Visual C++ 2015 Redistributable Package (x86)

## Hyland Software - Microsoft Service Pack Statement

The developers of OnBase are dedicated to ensuring the monthly cumulative updates released by Microsoft® are compatible with OnBase. On the second Tuesday of each month, the Quality Assurance Department of Hyland Software evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase and installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Digital Input Device Compatibility

Digital input devices, such as scanners and digital cameras, can use the Windows Image Acquisition (WIA) driver model. Depending on the module being used, devices that use TWAIN, Kofax, or ISIS can also be used.

To use Windows Image Acquisition (WIA) digital input devices to acquire images, the WIA Windows service must be configured with an **Automatic** or **Manual** Startup Type. For more information on WIA, including a complete list of devices compatible with WIA, see <http://www.microsoft.com>.

For more information on the TWAIN standard for image acquisition devices, see <http://www.twain.org>.

## Third-Party Software Requirements

Microsoft Office 2013 or later is required for working with Microsoft Office documents in the Medical Records Unity Client.

## Overview

The following sections outline requirements information specific to Message Broker in OnBase Foundation EP5. For general requirements information that applies to both Message Broker and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Microsoft .NET Framework Requirements

For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Microsoft Visual C++ Requirements

For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for Message Broker:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)

## Overview

The following sections outline requirements information specific to Minutes in OnBase Foundation EP5. For general requirements information that applies to both Minutes and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Minutes:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

For hardware requirements for Minutes, see [OnBase Client Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to Mobile Access for Android in OnBase Foundation EP5. For general requirements information that applies to both Mobile Access for Android and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

Android operating system 4.2 or greater is required to use OnBase Mobile Access for Android.

## Server Requirements

Mobile Access for Android requires a Mobile Applications Broker Server and Application Server.

## Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.

## Overview

The following sections outline requirements information specific to Mobile Access for iPad in OnBase Foundation EP5.

These requirements apply to the version-specific Mobile Access for iPad app.

For general requirements information that applies to both Mobile Access for iPad and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

### iOS Version Requirements

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 Foundation EP5, OnBase Mobile Access and Mobile Healthcare applications are supported on iOS version 14.4.2.

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 14.

### 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 Hyland Community (<https://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 Hyland Community at <https://www.onbase.com/community> or contact your first line of support.

## iOS Touch ID Requirements

The OnBase Mobile Access for iPad app supports the ability to log in to OnBase using Apple's Touch ID® authentication.

This allows users to log in to OnBase using a fingerprint instead of requiring them to manually enter their credentials each time.

In order to use this functionality, the iOS device must support Touch ID and Touch ID must be enabled in the iOS Settings app. Touch ID must also be enabled in the OnBase app after installation.

Refer to Apple's documentation for additional information about Touch ID.

## Server Requirements

Mobile Access for iPad requires a Mobile Applications Broker Server and Application Server.

## Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.



## Overview

The following sections outline requirements information specific to Mobile Access for iPad in OnBase Foundation EP5.

These requirements apply to the non-versioned Mobile Access for iPad app.

For general requirements information that applies to both Mobile Access for iPad and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

### iOS Version Requirements

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 Foundation EP5, OnBase Mobile Access and Mobile Healthcare applications are supported on iOS version 14.4.2.

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 14.

### 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 Hyland Community (<https://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 Hyland Community at <https://www.onbase.com/community> or contact your first line of support.

## Server Requirements

Mobile Access for iPad requires a Mobile Applications Broker Server and Application Server.

## Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.

## Overview

The following sections outline requirements information specific to Mobile Access for iPhone in OnBase Foundation EP5.

These requirements apply to the version-specific Mobile Access for iPhone app.

For general requirements information that applies to both Mobile Access for iPhone and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

### iOS Version Requirements

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 Foundation EP5, OnBase Mobile Access and Mobile Healthcare applications are supported on iOS version 14.4.2.

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 14.

### 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 Hyland Community (<https://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 Hyland Community at <https://www.onbase.com/community> or contact your first line of support.

## iOS Touch ID Requirements

The OnBase Mobile Access for iPhone app supports the ability to log in to OnBase using Apple's Touch ID® authentication.

This allows users to log in to OnBase using a fingerprint instead of requiring them to manually enter their credentials each time.

In order to use this functionality, the iOS device must support Touch ID and Touch ID must be enabled in the iOS Settings app. Touch ID must also be enabled in the OnBase app after installation.

Refer to Apple's documentation for additional information about Touch ID.

## Server Requirements

Mobile Access for iPhone requires a Mobile Applications Broker Server and Application Server.

## Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.

## Overview

The following sections outline requirements information specific to Mobile Access for iPhone in OnBase Foundation EP5.

These requirements apply to the non-versioned Mobile Access for iPhone app.

For general requirements information that applies to both Mobile Access for iPhone and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

### iOS Version Requirements

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 Foundation EP5, OnBase Mobile Access and Mobile Healthcare applications are supported on iOS version 14.4.2.

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 14.

### 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 Hyland Community (<https://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 Hyland Community at <https://www.onbase.com/community> or contact your first line of support.

## Server Requirements

Mobile Access for iPhone requires a Mobile Applications Broker Server and Application Server.



## Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.

## Overview

The following sections outline requirements information specific to the Mobile Applications Broker Server in OnBase Foundation EP5. For general requirements information that applies to both the Mobile Applications Broker Server and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

The operating system requirements for the Mobile Applications Broker Server match those of the Application Server and Web Server.

- For information on supported operating system requirements, see [Operating System Requirements on page 11](#).
- For information on the Microsoft .NET requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Web Browser Requirements on page 13](#).

## Hardware Requirements

See [Server and Core Services Hardware Requirements on page 17](#).

## Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.

## Overview

The following sections outline requirements information specific to the OnBase Mobile Healthcare app in OnBase Foundation EP5, where the OnBase Mobile Healthcare app is configured for Mobile eCapture.

For general requirements information that applies to both the Mobile Healthcare app and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

### Android OS

Android OS version 5.0 or greater is required in order to use the OnBase Mobile Healthcare app.

Patient Registration mode in the OnBase Mobile Healthcare app is supported for use on Android tablets.

### iOS

Patient Registration in the OnBase Mobile Healthcare app is supported on iPads only.

### iOS Version Support Statement

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 Foundation EP5, OnBase Mobile Access and Mobile Healthcare applications are supported on iOS version 14.4.2.

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 14.

## 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 Hyland Community (<https://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 Hyland Community at <https://www.onbase.com/community> or contact your first line of support.

## Server Requirements

The OnBase Mobile Healthcare app requires a Mobile Applications Broker Server and Application Server.

## Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.

## Overview

The following sections outline requirements information specific to the OnBase Mobile Healthcare app in OnBase Foundation EP5.

For general requirements information that applies to both the Mobile Healthcare app and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Operating System Requirements

### Android OS

Android OS version 5.0 or greater is required in order to use the OnBase Mobile Healthcare app.

The OnBase Mobile Healthcare app is supported for use on Android tablets and phones. Clinical Consents functionality is only supported on Android tablets.

For best performance, devices used with the OnBase Mobile Healthcare app should have a minimum diagonal screen measurement of 10 inches.

### iOS

The OnBase Mobile Healthcare app is supported for use on iPhones and iPads. Clinical Consents functionality is only supported on iPads.

### iOS Version Requirements

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 Foundation EP5, OnBase Mobile Access and Mobile Healthcare applications are supported on iOS version 14.4.2.

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 14.

## 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 Hyland Community (<https://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 Hyland Community at <https://www.onbase.com/community> or contact your first line of support.

## Server Requirements

The OnBase Mobile Healthcare app requires a Mobile Applications Broker Server and Application Server.

## Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.



## Overview

The following sections outline requirements information specific to OnBase for Meditech ODA in OnBase Foundation EP5. For general requirements information that applies to both OnBase for Meditech ODA and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for OnBase for Meditech ODA:

- For information on supported databases, see [Databases Supported on page 7](#).

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**Note:** The Hyland Multiserver does not support 64-bit Oracle databases.

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- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for OnBase for Meditech ODA:

- For information on the supported desktop operating systems, see the **Web/ Application Server** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

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**Note:** The .NET Framework requirement applies to the OnBase Application Server, the Processing Server (the server hosting the Hyland Meditech Release Service and, if needed, the Hyland Multiserver and the Hyland Printserver), the server hosting the Hyland Meditech Listener, and the client-side workstations where the OnBase for Meditech Viewer is installed.

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- For information on Microsoft Visual C++ requirements for the Application/Web server, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#) for information on the Application Server browser requirements.

## Meditech Requirements

Your Meditech solution must be licensed and registered for Optical Disk Archiving (ODA) in order for your OnBase for Meditech ODA solution to function.

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**Note:** If your Meditech solution is not, or cannot be, ODA-enabled, contact your solution provider or see the OnBase for Meditech without ODA documentation for more information on building an OnBase for Meditech solution.

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For information on the hardware and software requirements for your Meditech Magic or Client/Server with ODA solution, contact your Meditech solution provider.

## Hyland Multiserver Microsoft Visual C++ Requirements

One or more versions of the Microsoft Visual C++ Redistributable Package are required. If not already present on your system, the required packages are installed when the **setup.exe** installer is used to install this module.

Workstations running the Hyland Multiserver require the following:

- Microsoft Visual C++ 2005 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)

## Installing ActiveX Controls

When ActiveX controls are deployed through the Web browser on a system with UAC enabled, the user is prompted to install each control asking **Do you want to allow the following program to make changes to this computer?**

The prompt is displayed the first time each ActiveX control is needed. Users who are logged on as administrators can click **Yes** to install the specified ActiveX control. Once the control is installed, the user is not prompted again for that control.

If the user is logged on as a standard user rather than an administrator, then an administrator must provide his or her credentials before the control can be installed. To avoid this scenario, deploy the Web ActiveX controls using the Hyland Web ActiveX Controls installer.

## Overview

The following sections outline requirements information specific to the OnBase VNA module in OnBase Foundation EP5. For general requirements information that applies to both VNA and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for VNA:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [OnBase Client Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to Office Business Application for 2019 in OnBase Foundation EP5. For general requirements information that applies to both Office Business Application for 2019 and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

For general requirements information on the Hyland Office Products Installers, see [Hyland Office Products Installers on page 162](#).

## Database Requirements

See the following sections for more information on the database requirements for Office Business Application for 2019:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Office Business Application for 2019:

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements for the Application and Web Servers, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for information on browser requirements for the Unity Client.

## Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#) for information on hardware requirements for the Unity Client.

## Third-Party Software Requirements

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**Caution:** OnBase does not support mixed installations of multiple versions of Microsoft Office with the Office Business Application modules.

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Microsoft Office 2019 is required to use the Office Business Application for 2019. The latest service pack is also required.

Microsoft Outlook 2019 is required to email documents from the Office Business Application for 2019.

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**Note:** When installing the Office Business Application for 2019, the installer does not check for the correct Office version installed. If you do not have the correct Office version installed, the Office Business Application for 2019 installs but is not functional.

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## Microsoft Office 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. While OnBase modules that integrate with Microsoft Office applications can be used with the 64-bit versions of these applications, the 32-bit versions of these Microsoft Office applications are recommended for the OnBase integrations. Consult the Microsoft Office Support Statement for your version of Microsoft Office in the [Hyland Office Products Installers](#) chapter of this module reference guide for complete details on the limitations to using a 64-bit version of these applications.

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

## Hyland Software - Microsoft Service Pack Statement

The developers of OnBase are dedicated to ensuring the monthly cumulative updates released by Microsoft® are compatible with OnBase. On the second Tuesday of each month, the Quality Assurance Department of Hyland Software evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase and installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Overview

The following sections outline requirements information specific to OnBase Patient Window in OnBase Foundation EP5. For general requirements information that applies to both OnBase Patient Window and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for OnBase Patient Window:

- For information on the supported server operating systems, see the **Web/Application Server** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the supported client operating systems, see the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for OnBase Patient Window.

## Server Browser Requirements

See [Server Browser Requirements on page 14](#).

## Client Browser Requirements

OnBase Patient Window is supported on the following browsers:

- Mozilla Firefox Extended Support Release (ESR) 78
- Google Chrome 92 or greater
- Windows only:
  - Microsoft Edge on Chromium 92 or greater
  - Microsoft Internet Explorer 11 (IE 11)
- Mac OS only: Safari 14.1.x with the exceptions of full screen mode and Safari Reader

## Pop-Up Blockers

Pop-up blockers are not supported. On client workstations, either pop-up blockers must be disabled, or OnBase Patient Window must be added to the pop-up blocker's list of sites that allow pop-ups.

## Internet Explorer Settings

### Tabbed Browsing

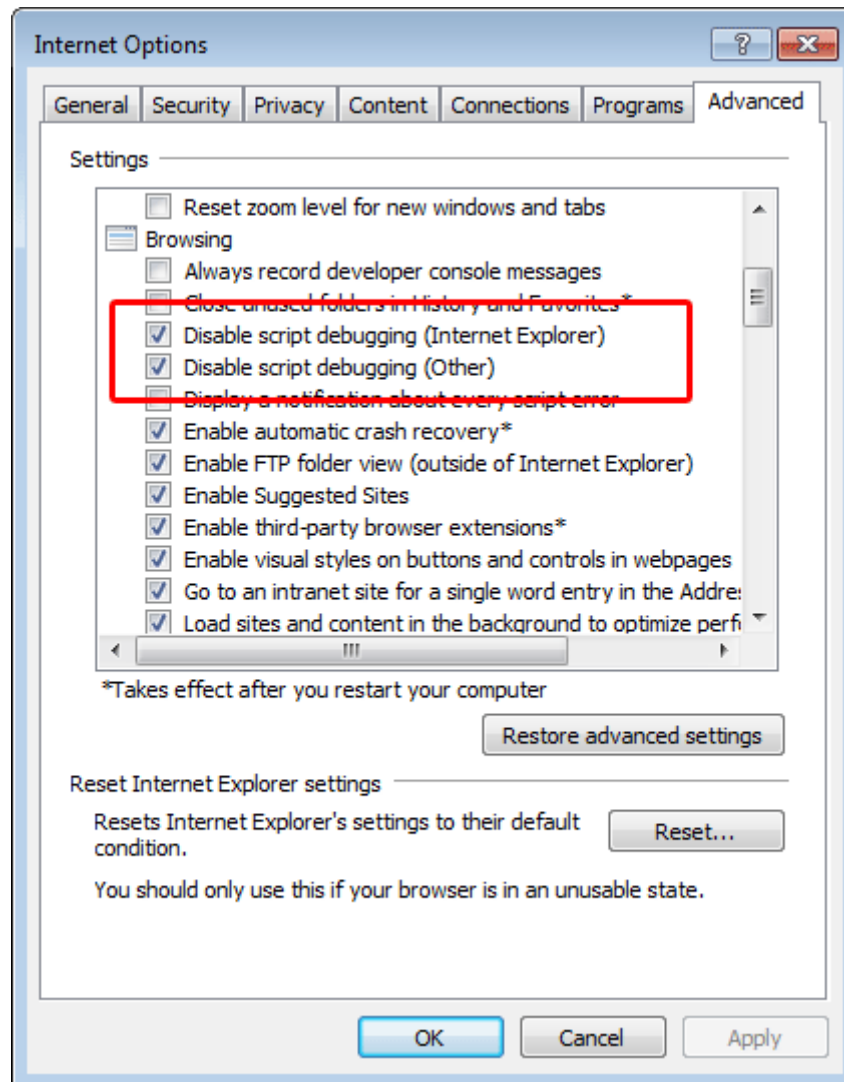
It is considered a best practice to make sure Internet Explorer's Tabbed Browsing Settings are configured to use either of the following pop-up settings:

- **Always open pop-ups in a new window**
- **Let Internet Explorer decide how pop-ups should open**

Using these settings will ensure OnBase Patient Window functions as intended.

## Internet Explorer Disable Script Debugging

Internet Explorer Settings must have **Disable Script Debugging (Internet Explorer)** and **Disable Script Debugging (Other)** checked (from Internet Explorer, select **Tools | Internet Options... | Advanced**):



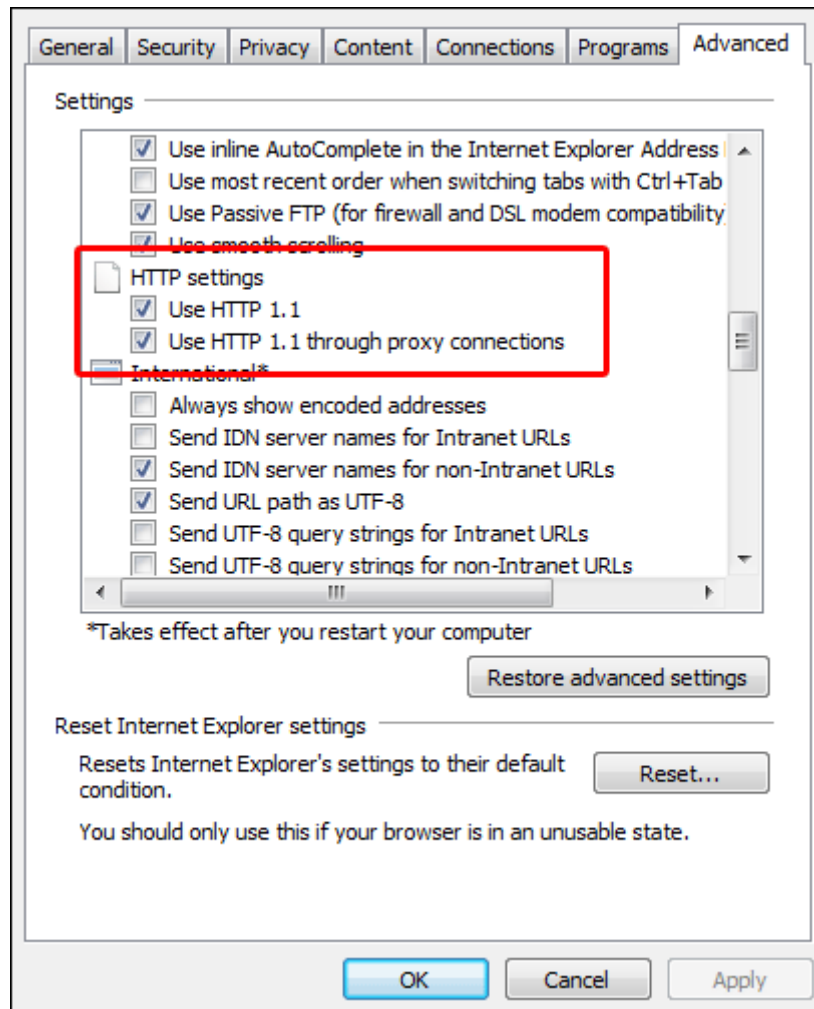
## Proxy Server Setup

Ensure the following items are configured when using a Proxy Server:

**Server side** — If the Web server is using a proxy server, verify that the proxy is setup with HTTP 1.1.



**Client side** — In Internet Explorer, please ensure that **HTTP 1.1 through proxy connections** is checked when using a proxy.



## Server and Core Services Hardware Requirements

See the following sections for more information on the hardware requirements for OnBase Patient Window:

- For 64-bit server-side hardware requirements, see [64-Bit Server Hardware Requirements on page 13](#).
- For 32-bit server-side hardware requirements, see [32-Bit Server Hardware Requirements on page 12](#).
- For client-side hardware requirements, see [Web Client Hardware Requirements on page 17](#).

## Overview

The following sections outline requirements information specific to PCL Input Filter in OnBase Foundation EP5. For general requirements information that applies to both PCL Input Filter and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for PCL Input Filter:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for PCL Input Filter:

- If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).
- If you are using AFP Input Filter with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Supported File Formats

PCL Level 1 - 5 are supported.

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**Note:** There are two types of PCL that are not supported: A PCL file that uses bitmapped fonts that are not represented within the file by the ASCII value of the characters, and HP-GL/2 extension to the PCL language.

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## Overview

The following sections outline requirements information specific to PDF Input Filter in OnBase Foundation EP5. For general requirements information that applies to both PDF Input Filter and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for PDF Input Filter:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).

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**Note:** Windows Server Core is not a supported Desktop Operating System for PDF Input Filter.

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- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

If you are setting up a processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to PDFPop in OnBase Foundation EP5. For general requirements information that applies to both PDFPop and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Prerequisites

PDFPop has the following prerequisites:

- The Web Server must be licensed and installed.
- The user must exist in the OnBase user configuration.
- PDFPop must be in the <appnet/DocPop> folder of a standard OnBase ASP.NET Web Server installation. This location cannot be modified.
- The Web Server's Web.config file must specify the name of the OnBase data source to use with PDFPop.
- Any device accessing a PDFPop URL must have an application installed that allows the viewing of PDF documents.

See the **Web Server** module reference guide for Web Server requirements.

## Operating System Requirements

See the following sections for more information on the operating system requirements for PDFPop:

- For information on the supported operating systems, see the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

The following web browsers are supported for use with FormPop and PDFPop:

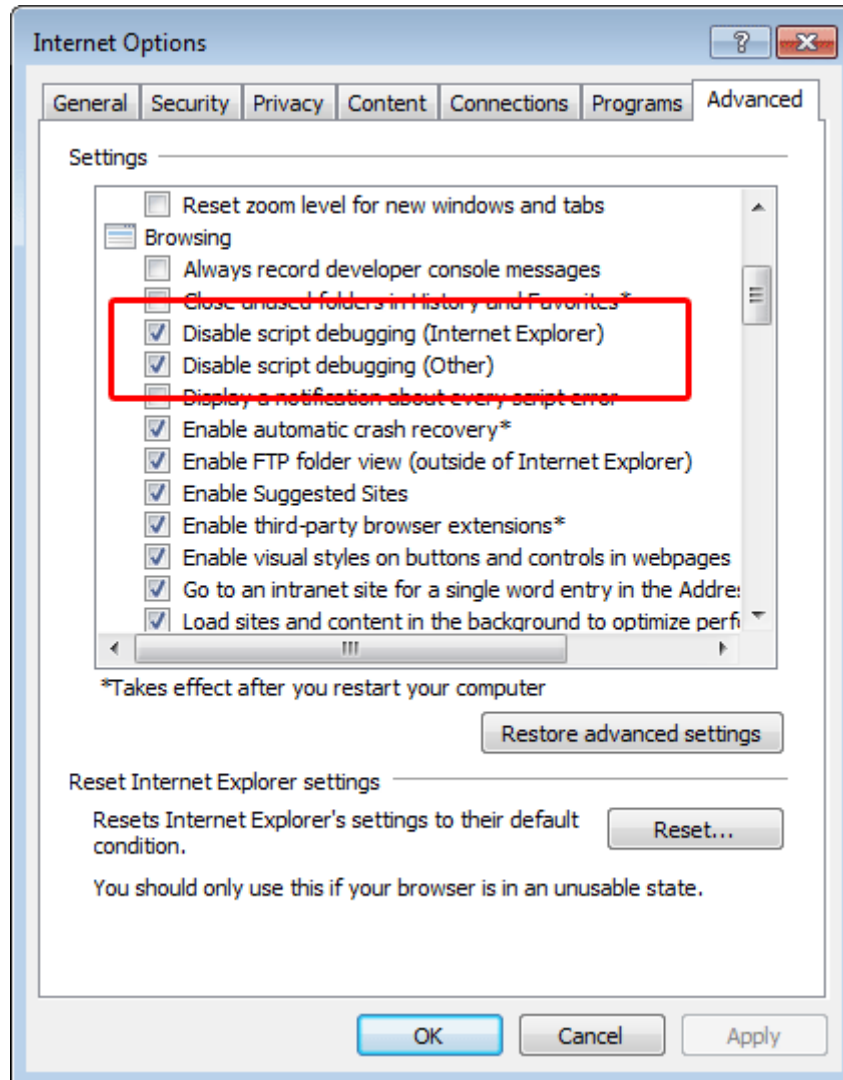
Web Browser	Supported Versions
Internet Explorer	Internet Explorer 11
Edge	EdgeHTML 14 and higher
Firefox	Firefox 28 and higher (including non-ESR versions)
Safari	Safari 9.1 and higher for OS X and macOS Safari for iOS
Google Chrome	Chrome 29 and higher

## Web Client Additional Browser Requirements

See the following sections for additional web browser configuration required for PDFPop.

### Internet Explorer Disable Script Debugging

Internet Explorer Settings must have **Disable Script Debugging (Internet Explorer)** and **Disable Script Debugging (Other)** checked (from Internet Explorer, select **Tools | Internet Options... | Advanced**):

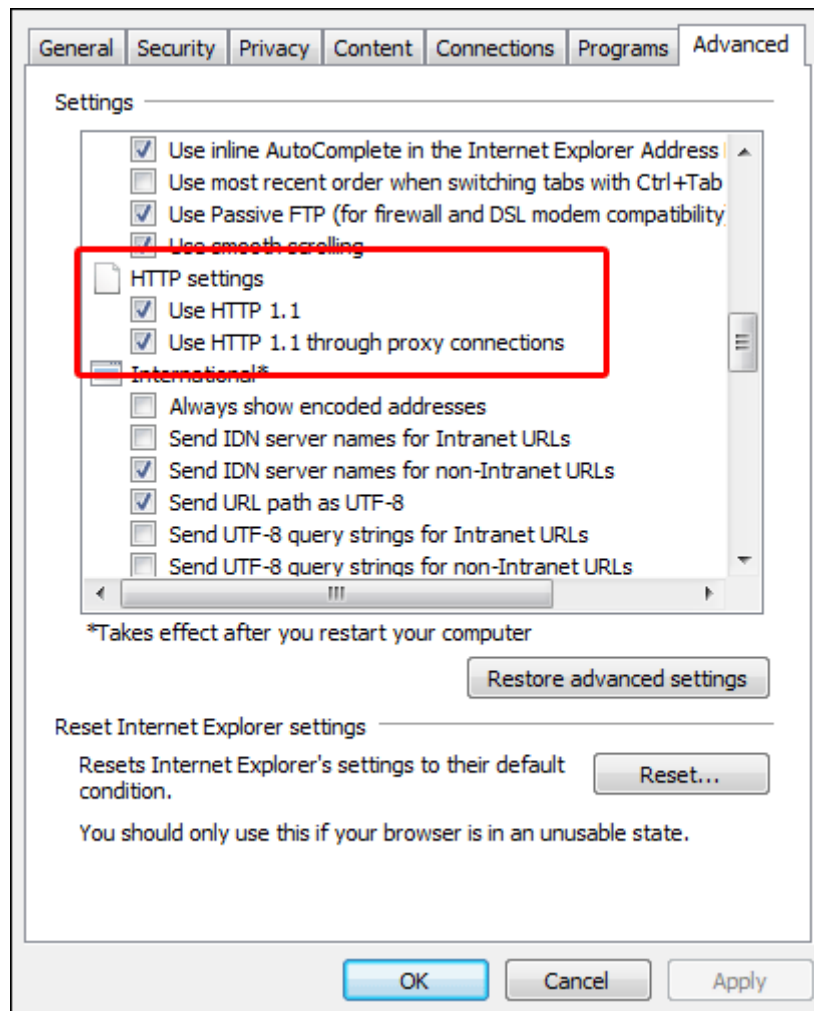


## Proxy Server Setup

Ensure the following items are configured when using a Proxy Server:

**Server side** — If the Web server is using a proxy server, verify that the proxy is setup with HTTP 1.1.

**Client side** — In Internet Explorer, please ensure that **HTTP 1.1 through proxy connections** is checked when using a proxy.



## Hardware Requirements

For hardware requirements for PDFPop, see [Web Client Browser Requirements](#) on page 13.



## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for PDFPop:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)
- [Windows User Account Control Statement on page 24](#)

## Overview

The following sections outline requirements information specific to Physical Records Management in OnBase Foundation EP5. For general requirements information that applies to both Physical Records Management and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Physical Records Management:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Physical Records Management:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Physical Records Management:

- If you are using Physical Records Management with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using Physical Records Management with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Physical Records Management:

- If you are using Physical Records Management with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- If you are using Physical Records Management the Web Client, see [Web Client Hardware Requirements on page 20](#).
- If you are using Physical Records Management with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).

## Installing ActiveX Controls

When ActiveX controls are deployed through the Web browser on a system with UAC enabled, the user is prompted to install each control asking **Do you want to allow the following program to make changes to this computer?**

The prompt is displayed the first time each ActiveX control is needed. Users who are logged on as administrators can click **Yes** to install the specified ActiveX control. Once the control is installed, the user is not prompted again for that control.

If the user is logged on as a standard user rather than an administrator, then an administrator must provide his or her credentials before the control can be installed. To avoid this scenario, deploy the Web ActiveX controls using the Hyland Web ActiveX Controls installer.

## Overview

The following sections outline requirements information specific to Print Distribution in OnBase Foundation EP5. For general requirements information that applies to both Print Distribution and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Print Distribution:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to Public Sector Constituency Web Access in OnBase Foundation EP5. For general requirements information that applies to both Public Sector Constituency Web Access and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Overview

The following sections outline requirements information specific to Quick Access in OnBase Foundation EP5. For general requirements information that applies to both Quick Access and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Prerequisites

Prior to installing Quick Access, the following must be installed and configured:

- The Hyland IdP (version 1.0.0 or later)
- API Server
  - OnBase GraphQL
  - Document Management REST API (version 0.8.0 or later)

See the **Identity and Access Management Services** documentation for information about configuring the Hyland IdP.

See the **API Server** documentation for information about installing and configuring the API Server.

## Web Browser Requirements

Quick Access is supported on the following browsers:

- Google Chrome 89 or greater
- Mozilla Firefox 87 or greater
- Windows only:
  - Microsoft Edge on Chromium 89 or greater
  - Microsoft Internet Explorer 11 (IE 11)
- Mac OS only: Safari 14.0.x or greater

## Application Version Requirements

Version 1.6.0 of Quick Access is supported with OnBase Foundation EP5.

## Additional Requirements

The following software must be installed or enabled on the server hosting Module Name:

- Internet Information Services (IIS)
- Microsoft .NET Core 2.1 Runtime & Hosting Bundle
- Microsoft .NET 4.7.2

## Overview

The following sections outline requirements information specific to RCM Payment Processing in OnBase Foundation EP5. For general requirements information that applies to both RCM Payment Processing and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for RCM Payment Processing:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for more information on the Web browser requirements for RCM Payment Processing.

## Hardware Requirements

See the following sections for more information on the hardware requirements for RCM:

- For OnBase Client processing workstations, see [OnBase Client Hardware Requirements on page 15](#).
- For RCM Unity Client end user workstations, see [RCM Client Hardware Requirements on page 288](#).



## RCM Client Hardware Requirements

Component	Minimum	Recommended
CPU	2.8 GHz	3.2 GHz
Memory (RAM)	8 GB	12 GB
Free Hard Disk Space (for installing and running the Unity Client)	500 MB	
Screen Resolution	1024 x 768 (1280 x 800) <b>Note:</b> 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

## Overview

The following sections outline requirements information specific to RCM Payment Processing (Legacy) in OnBase Foundation EP5. For general requirements information that applies to both RCM Payment Processing (Legacy) and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

In OnBase Foundation EP5, only the following database is supported for use with the legacy RCM client:

- Microsoft SQL Server 2016

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**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 the section on Database Client / Server version compatibility in the **Installation Requirements** manual.

---

## Operating System Requirements

See the following sections for more information on the operating system requirements for RCM Payment Processing (Legacy):

- For information on the supported desktop operating systems, see the OnBase Client column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Overview

The following sections outline requirements information specific to Records Management in OnBase Foundation EP5. For general requirements information that applies to both Records Management and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Records Management:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Records Management:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Records Management:

- If you are using Records Management with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using Records Management with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

# Hardware Requirements

See the following sections for more information on the hardware requirements for Records Management:

- If you are using Records Management with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- If you are using Records Management the Web Client, see [Web Client Hardware Requirements on page 20](#).
- If you are using Records Management with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).

## Overview

The following sections outline requirements information specific to Release of Information (Unity) in OnBase Foundation EP5. For general requirements information that applies to both Release of Information (Unity) and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Release of Information (Unity):

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Release of Information (Unity):

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for information on the Unity Client browser requirements.

## Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#) for information on hardware requirements for the Unity Client.

## ROI Packet Generation Server Requirements

The ROI Packet Generation Server is responsible for creating release of information packets. It hosts the ROI Packet Generation service.

The server can be a physical or virtual server, and it must meet the following requirements:

Component	Requirement
<b>Processor</b>	4 Core 3.2 GHz or greater
<b>RAM</b>	8 GB
<b>Operating System</b>	Same as OnBase Application Server
<b>Adobe and Microsoft Office Software</b>	<ul style="list-style-type: none"> <li>• Microsoft® Word 2010, Microsoft Word 2013, or Microsoft Word 2016</li> <li>• Adobe® Acrobat Reader®</li> </ul>
<b>Server .NET / XML / Runtime Libraries</b>	Same as OnBase Application Server

The following storage configuration is recommended. Actual requirements may vary per solution.

Drive	Type	Configuration	Usage	Size
<b>C:\</b>	DAS	RAID 1	Operating System	72 GB
<b>D:\</b>	DAS	RAID 1	Data Files	50 GB

## Overview

The following sections outline requirements information specific to Remittance Processor in OnBase Foundation EP5. For general requirements information that applies to both Remittance Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Remittance Processor:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Additional Requirements Considerations

See [Data Execution Prevention \(DEP\) on page 25](#).

## Overview

The following sections outline requirements information specific to Replicated Disk Groups in OnBase Foundation EP5. For general requirements information that applies to both Replicated Disk Groups and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## C++ Requirements

The following Microsoft Visual C++ Redistributable Packages are required:

- Microsoft Visual C++ 2012 Redistributable Package (x64)
- Microsoft Visual C++ 2019 Redistributable Package (x64)

If not already present on your system, these packages are installed when the **setup.exe** installer is used to install the OnBase Client or Configuration modules.

## Operating System Requirements

See the following sections for more information on the operating system requirements for Replicated Disk Groups:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [OnBase Client Hardware Requirements on page 15](#).



## Overview

The following sections outline requirements information specific to Report Capture with Meditech Magic and Meditech 6.0 in OnBase Foundation EP5. For general requirements information that applies to both Report Capture and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Report Capture:

- For information on supported databases, see [Databases Supported on page 7](#).

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**Note:** Oracle databases are not supported for Report Capture.

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- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

---

**Note:** Database client and server version compatibility is only pertinent to installing Report Capture with Meditech 6.0.

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## Operating System Requirements

See the following sections for more information on the operating system requirements for Report Capture:

- For information on the supported desktop operating systems, see the **OnBase Client** and **Web/Application Server** table columns in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on Microsoft Visual C++ requirements for the Web/Application server, see [Server C++ Requirements on page 12](#).

## Hardware Requirements

See [Client Retrieval Workstation Hardware Requirements on page 15](#) for information on hardware requirements for client retrieval workstations.

## Microsoft Visual C++ Requirements

One or more versions of the Microsoft Visual C++ Redistributable Package are required. If not already present on your system, the required packages are installed when the setup.exe installer is used to install this module.

Workstations running Report Capture require the following:

- Microsoft Visual C++ 2012 Redistributable Package (x86)
- Microsoft Visual C++ 2013 Redistributable Package (x86)
- Microsoft Visual C++ 2019 Redistributable Package (x86)

## Overview

The following sections outline requirements information specific to Report Mining in OnBase Foundation EP5. For general requirements information that applies to both Report Mining and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Report Mining:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Third-Party Software Requirements

Report Mining workstations require a supported version of Microsoft Office Excel.

## Overview

The following sections outline requirements information specific to Report Services in OnBase Foundation EP5. For general requirements information that applies to both Report Services and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## General Requirements

Report Services requires an OnBase Application server with the Report Services server components installed. For more information on installing the OnBase Application server and Report Services server components, see the Application Server module reference guide.

Microsoft Data Access Components is required for data scenarios.

## IIS

Microsoft Internet Information Services (IIS) is required on the Report Services server.

## .NET Framework

The version of the .NET Framework required by the module being installed must be installed on both the deployment and client machines before installation.

For Oracle 11g databases, the **Oracle Data Provider for .NET** and **Oracle Providers for ASP.NET** components must be installed with the Oracle client on the OnBase Application Server. Consult the documentation provided by Oracle for details on installing these components using the installers provided by Oracle.

For more information on .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#)

## Overview

The following sections outline requirements information specific to Reporting Dashboards in OnBase Foundation EP5. For general requirements information that applies to both Reporting Dashboards and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Overview

The following sections outline requirements information specific to REQ Connect in OnBase Foundation EP5. For general requirements information that applies to both REQ Connect and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Required Modules

The following OnBase modules are required for IACconnect:

- Application Server
- Client
- Report Services
- Single Sign-On for Microsoft Active Directory Service
- Unity Client
- Web Client
- Web Server
- Workflow
- Workflow Approval Management
- Hyland IdP

## Costpoint Versions Supported

- Costpoint 7.1
- Costpoint 7.1.1
- Costpoint 8.0

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**Caution:** Other minor versions of Costpoint have not been tested with IACconnect. Performing acceptance testing is recommended before deploying in a production environment.

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## Overview

The following sections outline requirements information specific to Signature Deficiencies for Epic in OnBase Foundation EP5. For general requirements information that applies to both Signature Deficiencies for Epic and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Signature Deficiencies for Epic:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

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**Note:** The OnBase Client and Configuration modules require an ODBC connection to the OnBase database.

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## Operating System Requirements

See the following sections for more information on the operating system requirements for Signature Deficiencies for Epic:

- For information on the supported desktop operating systems, see the **Web/ Application Server** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

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**Note:** The .NET Framework requirement applies to the OnBase Application Server, client workstations running Signature Deficiencies for Epic, and the Hyland Integration for Epic installer.

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- For information on Microsoft Visual C++ Requirements for the Application Server, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See [Server Browser Requirements on page 14](#) for information on the Application Server browser requirements.

## Hardware Requirements

See [32-Bit Server Hardware Requirements on page 17](#) for information on hardware requirements for a 32-bit Application Server.

## Microsoft Visual C++ Requirements

One or more versions of the Microsoft Visual C++ Redistributable Package are required. If not already present on your system, the required packages are installed when the **setup.exe** installer is used to install this module.

### Client Workstation Visual C++ Runtime Requirements

Signature Deficiencies for Epic requires the Microsoft Visual C++ 2012 Redistributable Package (x86) and Microsoft Visual C++ 2019 Redistributable Package (x86) to be installed on client workstations.

## Compatible Epic Versions

Signature Deficiencies for Epic requires the Epic HIM application with the Chart Deficiency module. You can use Signature Deficiencies for Epic with the following Epic versions:

- Epic August 2018 and later
- Epic February 2018
- Epic 2017
- Epic 2015



## Overview

The following sections outline requirements information specific to Signature Pad Interface in OnBase Foundation EP5. For general requirements information that applies to both Signature Pad Interface and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Signature Pad Interface:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for Signature Pad Interface:

- If you are using Signature Pad Interface with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using Signature Pad Interface with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Signature Pad Interface:

- If you are using Signature Pad Interface with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).
- If you are using Signature Pad Interface with the Web Client, see [Web Client Hardware Requirements on page 20](#).
- If you are using Signature Pad Interface with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).

## Third-Party Software Requirements

Signature Pad Interface requires appropriate drivers compatible with Topaz or Wacom models. Refer to the respective product page for complete download instructions for the appropriate drivers.

## Overview

The following sections outline requirements information specific to Statement Composition in OnBase Foundation EP5. For general requirements information that applies to both Statement Composition and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Statement Composition:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Statement Composition:

- If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).
- If you are using Statement Composition with the OnBase Client, see [Client Retrieval Workstation Hardware Requirements on page 15](#).

## Overview

The following sections outline requirements information specific to StatusView in OnBase Foundation EP5. For general requirements information that applies to both StatusView and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for StatusView:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)
- [Windows User Account Control Statement on page 24](#)

## Web Server Requirements

StatusView is part of the Web Client; therefore, it requires Core Services and a functioning Web Server.

The Web Server must be able to request and access StatusView web pages. Ensure that you can retrieve StatusView web pages from the Web Server that is hosting OnBase.

See the **Web Server** module reference guide for Web Server requirements.

## Overview

The following sections outline requirements information specific to Storage Integration for EMC Centera® in OnBase Foundation EP5. For general requirements information that applies to both Storage Integration for EMC Centera® and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

Storage Integration for EMC Centera® requires EMC Centera 32-bit SDK version 3.2P3 or 3.2P5. OnBase requires the 32-bit version of the SDK under both 32-bit and 64-bit operating systems.

If you are running the integration using 2-Tier Mode, the Centera SDK must be installed on the OnBase Client workstation in the system path.

If you are running the integration using 3-Tier Mode, the Centera SDK must be installed in the system path of the DCS server.

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**Note:** The OnBase application server can only operate with Centera in 2-Tier mode.

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**Caution:** Ensure that you use the same Centera SDK version throughout your system to avoid any potential data problems caused by mismatched versions. Files archived to Centera using one EMC Centera SDK version are not retrievable using another version. In mixed environments it is recommended to upgrade all appropriate workstations to the same version.

---

## Operating System Requirements

See the following sections for more information on the operating system requirements for Storage Integration for EMC Centera®:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Upgrading

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**Caution:** OnBase systems that include a Centera unit as part of its document storage solution should not allow access to the production Centera unit for non-production installations (e.g., test or development systems). This is because the Centera unit does not contain a unique OnBase installation ID, meaning that if a document is purged from a non-production system that has access to the production Centera unit, that document is also purged from the production Centera unit.

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When upgrading Storage Integration for EMC Centera® to OnBase 10.0 or higher, all OnBase Clients and OnBase servers must also be upgraded to 10.0 or higher, and any Distributed Centera Services servers must be upgraded to DCS version 1.1.5-b7 or higher.

When upgrading from a version prior to 2.0.1-b1, to version 2.0.1-b1 or higher, you must create an encryption key for to use after the upgrade has been performed. You must also create a key for new installations.

To create an encryption key, follow the **Validating, Updating, or Rotating the Encryption Key** instructions in the Configuration chapter of this manual.

## Overview

The following sections outline requirements information specific to Storage Integration for IBM Tivoli in OnBase Foundation EP5. For general requirements information that applies to both Storage Integration for IBM Tivoli and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

All clients accessing the Tivoli server must have access to the port on the server that is functioning as the connection to the disk groups.

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**Note:** The OnBase web server can only operate with Tivoli in 2-Tier mode.

---

## Operating System Requirements

See the following sections for more information on the operating system requirements for Storage Integration for IBM Tivoli:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Upgrading

When upgrading from a version prior to 2.0.1-b1, to version 2.0.1-b1 or higher, you must create an encryption key for to use after the upgrade has been performed. You must also create a key for new installations.

To create an encryption key, follow the [Validating, Updating, or Rotating the Encryption Key](#) instructions in the Configuration chapter of this manual.

## Tivoli Version

Storage Integration for IBM Tivoli is supported for Tivoli Storage Manager (TSM) Client versions 5.5.x and 6.2.x.

Consult the documentation for Tivoli provided by IBM for complete details on Tivoli Client/Server version compatibility.

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**Caution:** IBM has reported a known issue with mixed environments that are using both TSM Client 5.5.x and 6.2.x. Files archived to Tivoli using TSM Client 6.2.x are not retrievable using TSM Client 5.5.x. In mixed environments it is recommended to upgrade all workstations running TSM Client 5.5.x to TSM Client 6.2.x. Files archived using TSM Client 5.5.x are still retrievable using TSM Client 6.2.x.\

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## Overview

The following sections outline requirements information specific to Workflow Approval Management in OnBase Foundation EP5. For general requirements information that applies to both Workflow Approval Management and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Workflow Approval Management:

- For information on the supported databases, see [Databases Supported on page 7](#).
- For information about connection strings, see [ADO.NET Connection Strings on page 6](#).
- For information about file server and database servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Workflow Approval Management:

- For information on general operating system requirements, see [General Requirements on page 11](#).
- For information on Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Workflow Approval Management:

- For information on client hardware requirements, see [OnBase Client Hardware Requirements on page 15](#).
- For information on server hardware requirements, see [Server and Core Services Hardware Requirements on page 17](#).

## Overview

The following sections outline requirements information specific to System Administration in OnBase Foundation EP5. For general requirements information that applies to both System Administration and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for System Administration:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).
- For information on database client and server version compatibility, see [Database Client / Server Version Compatibility on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for System Administration:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Miscellaneous Requirements

### Data Execution Prevention (DEP)

Data Execution Prevention, or DEP, is a Windows feature that prevents execution of code from places where it should not be executed. Two kinds of DEP may be present on any system running any modern Windows client or server operating system: DEP software and hardware-based DEP. Each type of DEP prevents a different type of undesired code execution. By default, DEP software is contained in all modern Windows client and server operating systems. Hardware-based DEP, or computer-hardware enforced protection, requires a processor that will support hardware-based DEP. Processors that support hardware-based DEP do so through a set of instructions on the processor that implement the hardware protection. Hardware-based DEP is only used in Windows when such a processor is present.

If there is an issue with OnBase as a result of DEP, make sure an exception for OnBase has been created in your DEP settings.

### Determining DEP Settings

The following instructions will help you determine whether DEP settings need to be adjusted on your system:

1. Log on to your operating system with administrator rights.
2. Open the Control Panel and select **System**. The **System** window is displayed.
3. Click **Advanced system settings** in the sidebar. The **System Properties** dialog box is displayed.
4. Select the **Advanced** tab.
5. Select the **Settings** button in the **Performance** section. The **Performance Options** dialog box is displayed.

6. Select the **Data Execution Prevention** tab.

When configuring DEP, two options are present to choose from: **Turn on DEP for essential Windows programs and services only** and **Turn on DEP for all programs and services except those I select**. The first option is selected by default for Windows client operating systems. The second option is selected by default for Windows server operating systems. When DEP is only turned on for essential Windows programs and services, OnBase will perform normally. However, when **Turn on DEP for all programs and services except those I select** has been chosen, and hardware-based DEP is enabled, exceptions need to be configured to exempt OnBase from DEP.

---

**Note:** Text at the bottom of the **Data Execution Prevention** tab will indicate whether hardware-based DEP is supported on your system.

---

## Configuring Exceptions to DEP Settings

To configure exceptions to DEP settings:

1. In the **Data Execution Prevention** tab, the **Turn on DEP for all programs and services except those I select** option should be already selected.

---

**Caution:** Do NOT select this option if it is not already selected. Selecting this option enables a higher DEP security level, which could potentially cause issues with other applications on your system.

---

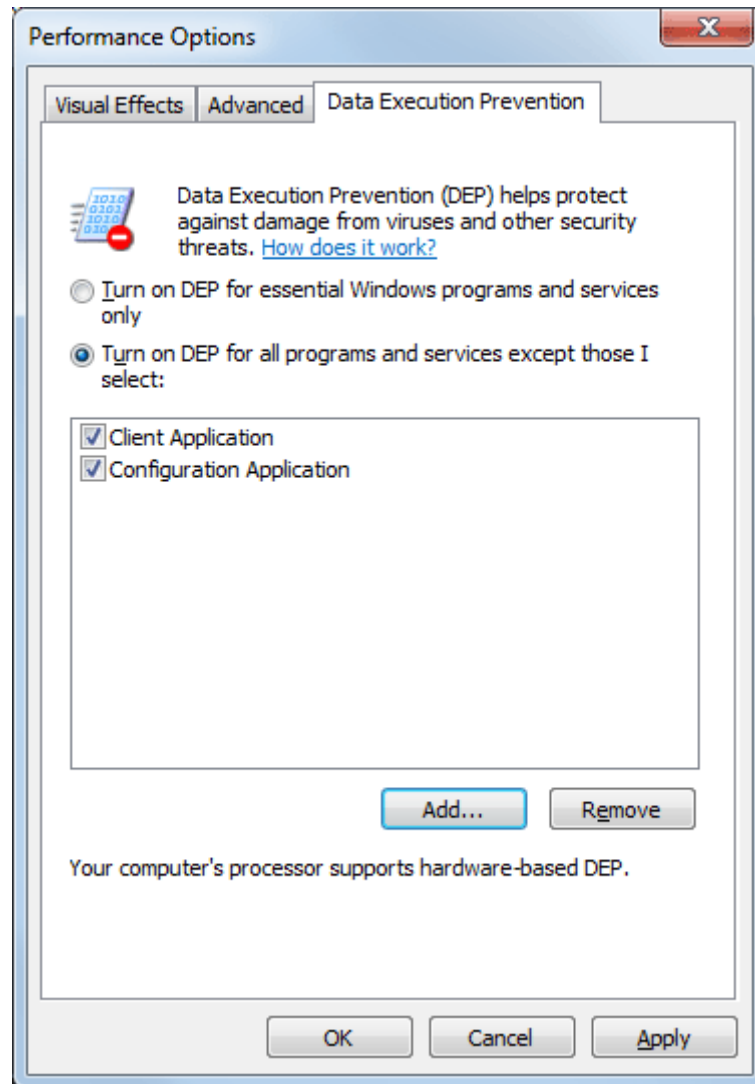
2. Click **Add...**
3. Browse out to the location of your OnBase Configuration and/or Client executable files. Click **Open**.

---

**Note:** The location of the executables must be full paths.

---

4. Selected applications will display in the exceptions list.



If you continue to experience problems, consult your service provider.

## Authenticode Signature Verification

The OnBase Client and Configuration modules each require an additional configuration file to complete a successful installation: **obclnt32.exe.config** and **obcfg32.exe.config**, for use with the OnBase Client and Configuration module, respectively. These files are necessary under the .NET Framework to enable or disable a check of the Authenticode signatures applied to the OnBase executables. Authenticode is a Microsoft technology that uses digital certificates to identify the publisher of an application to ensure the application's integrity and to verify that the software has not been infected by any malware since it was created.

These files are located in the same directory as the OnBase Client and Configuration module executables and are installed automatically by the Client Installer. Signature verification is disabled by default for both executables. For more information on this topic, see: <http://support.microsoft.com/kb/936707>.

---

**Note:** If you are running the OnBase Client or Configuration module via a UNC connection, and trust is set to verify by publisher, then Authenticode signature verification must be enabled. If trust is set to verify by UNC path, signature verification does not have to be enabled.

---

## Enabling Authenticode Signature Verification

Locate the **obcInt32.exe.config** file for the OnBase Client or the **obcfg32.exe.config** file for the Configuration module. To enable signature verification:

1. Open the file for editing in a plain-text editor, such as Notepad.
2. Locate the **generatePublisherEvidence** element.
3. Change the **enabled** attribute to **true**:  
`<generatePublisherEvidence enabled="true"/>`
4. Save and close the file.

---

**Note:** If the machine running the executables does not have Internet access, or the speed of the network to which it is connected is slow, it could take a noticeably long time to perform this check, causing the application to take longer to launch.

---

## Disabling Authenticode Signature Verification

Locate the **obcInt32.exe.config** file for the OnBase Client or the **obcfg32.exe.config** file for the Configuration module. To disable signature verification:

1. Open the file for editing in a plain-text editor, such as Notepad.
2. Locate the **generatePublisherEvidence** element.
3. Change the **enabled** attribute to **false**:  
`<generatePublisherEvidence enabled="false"/>`
4. Save and close the file.

## Overview

The following sections outline requirements information specific to Unity Briefcase in OnBase Foundation EP5. For general requirements information that applies to both Unity Briefcase and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Unity Briefcase:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Unity Briefcase:

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Microsoft Visual C++ Requirements

One or more versions of the Microsoft Visual C++ Redistributable Package are required. If not already present on your system, the required packages are installed when the **setup.exe** installer is used to install this module.

Each workstation where the module will be installed requires the following Microsoft Visual C++ Redistributable Packages:

- Microsoft Visual C++ 2005 Redistributable Package (x86)
- Microsoft Visual C++ 2012 Redistributable Package (x86/x64)
- Microsoft Visual C++ 2019 Redistributable Package (x86/x64)

## Hyland Software - Microsoft Windows Updates

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### Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Web Browser Requirements

See [Unity Client Browser Requirements on page 14](#) for information on Unity Client web browser requirements.

## Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#) for information on Unity Client hardware requirements.

## Digital Input Device Compatibility

Digital input devices, such as scanners and digital cameras, can use the Windows Image Acquisition (WIA) driver model. Depending on the module being used, devices that use TWAIN, Kofax, or ISIS can also be used.

To use Windows Image Acquisition (WIA) digital input devices to acquire images, the WIA Windows service must be configured with an **Automatic** or **Manual** Startup Type. For more information on WIA, including a complete list of devices compatible with WIA, see <http://www.microsoft.com>.



For more information on the TWAIN standard for image acquisition devices, see <http://www.twain.org>.

## SQL Server Compact 3.5

Each workstation where the module will be installed requires Microsoft SQL Server Compact 3.5 SP1 (or later service pack). Microsoft SQL Server Compact 3.5 SP1 is automatically installed when running the module installer. It is also automatically installed when installing the Unity Client.

The module uses SQL Server Compact for your workstation's database. This database is limited to 4 GB.

## Overview

The following sections outline requirements information specific to the Unity Client in OnBase Foundation EP5. For general requirements information that applies to both the Unity Client and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Unity Client:

- For information on the supported desktop operating systems, see the Unity Client table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

## Web Browser Requirements

See [Unity Client Browser Requirements](#) on page 14.

## Server and Core Services Hardware Requirements

See [Unity Client Platform Hardware Requirements](#) on page 21.

## HTTPS Automation Requirements

If you are installing Application Enabler and you want to expose an HTTPS endpoint to allow third-party applications to perform Application Enabler context events, additional requirements must be met.

The following requirements must be configured prior to enabling HTTPS Automation:

- A domain that will resolve to **localhost**.
- An HTTPS binding public/private key pair for the domain, in .PEM format, that must be trusted by all client workstations.
- The password for the private key must be **OnBase**.
- The key pair must be stored somewhere accessible to all clients using HTTPS Automation (for example, distributed to every workstation or stored in a network share accessible via UNC).

If you need a URL and certificate to use with an HTTPS binding, contact your first line of support.

## Third-Party Software Requirements

Microsoft Office 2013 or greater is required to work with Microsoft Office documents in the Unity Client. Ensure that the latest Office service pack is installed.

Microsoft Outlook 2013 or greater, Lotus Notes 8.5.x, IBM Notes 9.0.x, or Novell GroupWise 2012 or 2014 is required to email documents in the Unity Client.

## Digital Input Device Compatibility

Digital input devices, such as scanners and digital cameras, can use the Windows Image Acquisition (WIA) driver model. Depending on the module being used, devices that use TWAIN, Kofax, or ISIS can also be used.

To use Windows Image Acquisition (WIA) digital input devices to acquire images, the WIA Windows service must be configured with an **Automatic** or **Manual** Startup Type. For more information on WIA, including a complete list of devices compatible with WIA, see <http://www.microsoft.com>.

For more information on the TWAIN standard for image acquisition devices, see <http://www.twain.org>.

## Overview

The following sections outline requirements information specific to Unity Forms in OnBase Foundation EP5. For general requirements information that applies to both Unity Forms and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Databases Supported on page 7](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Unity Forms:

- For information on the supported desktop operating systems, see the Unity Client table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Server and Core Services Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#).

## Web Browser Requirements

Fully supported browsers for 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 on Chromium 89 and greater
- Google Chrome 89 and greater
- Mozilla Firefox 87 and greater
- Apple Safari 14.0 and greater

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



## Overview

The following sections outline requirements information specific to Unity Scheduler in OnBase Foundation EP5. For general requirements information that applies to both Unity Scheduler and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Unity Scheduler:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Unity Scheduler:

- For information on the supported desktop operating systems, see the **Unity Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

See [Unity Client Platform Hardware Requirements on page 21](#).

## Overview

The following sections outline requirements information specific to the Virtual Print Driver in OnBase Foundation EP5. For general requirements information that applies to both the Virtual Print Driver and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Virtual Print Driver:

- For information on the supported desktop operating systems, see the **OnBase Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [General C++ Requirements on page 12](#).

## 64-Bit Support Statement

The Virtual Print Driver can only be installed on 64-bit environments using the 64-bit version of the Virtual Print Driver.

For more information, contact your solution provider.

## Hardware Requirements

See [Client Retrieval Workstation Hardware Requirements on page 15](#).



# Additional Requirements Considerations

## Version Independence

The OnBase Virtual Print Driver is version-independent. This means that the Virtual Print Driver can be upgraded independently from your OnBase solution, and vice-versa. For example, an organization uses OnBase version 17 but wants to make use of features available in the 18 Virtual Print Driver. This organization can upgrade the Virtual Print Driver to version 18 while still using OnBase 17. Similarly, an organization can choose to upgrade OnBase without upgrading the Virtual Print Driver.

## Limitations

Before installing and using the Virtual Print Driver, consider the following limitations.

### Network Printing

The Virtual Print Driver should not be installed as a network printer. Each user should install Virtual Print Driver directly on a local machine.

If it is necessary to use the Virtual Print Driver as a network printer, contact your first line of support.

### Large File Sizes

TIFF images produced can be large, depending on the settings used. Generally, lower DPI settings and use of Black and White mode significantly reduces file sizes. You can also reduce file sizes by using JPEG compression instead of LZW compression.

### Speed

Printing large documents can take considerable time, particularly if the print driver is in Color mode or printing at a high resolution. However, the Virtual Print Driver is still considerably faster than printing to paper.

## Overview

The following sections outline requirements information specific to VP Connect in OnBase Foundation EP5. For general requirements information that applies to both VP Connect and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Required Modules

The following OnBase modules are required for IAConnect:

- Application Server
- Client
- Report Services
- Single Sign-On for Microsoft Active Directory Service
- Unity Client
- Web Client
- Web Server
- Workflow
- Workflow Approval Management
- Hyland IdP

## Costpoint Versions Supported

- Costpoint 7.1
- Costpoint 7.1.1
- Costpoint 8.0

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**Caution:** Other minor versions of Costpoint have not been tested with IAConnect. Performing acceptance testing is recommended before deploying in a production environment.

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## Overview

Web Application Management Console can run in Windows environments that support the OnBase Web Server and Application Server. Refer to the Web Server requirements for information about supported operating systems and software requirements.

The following sections outline requirements information specific to Web Application Management Console in OnBase Foundation EP5. For general requirements information that applies to both Web Application Management Console and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Microsoft .NET Framework Requirements

See [Microsoft .NET Framework Requirements on page 11](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for Web Application Management Console:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)

## Overview

The following sections outline requirements information specific to Web Parts for Microsoft SharePoint in OnBase Foundation EP5. For general requirements information that applies to both Web Parts for Microsoft SharePoint and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Web Parts for Microsoft SharePoint:

- For information on supported databases, see [Databases Supported on page 7](#).
- For information on database and file servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Web Parts for Microsoft SharePoint:

- For information on the supported desktop operating systems, see the **Web/ Application Server** table column and the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

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**Note:** The required version of .NET must be installed on the SharePoint server.

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- For information on the Microsoft Visual C++ requirements for the Web Server, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the web browser requirements for Web Parts for Microsoft SharePoint:

- For information on Web Client browser requirements, see [Web Client Browser Requirements on page 13](#).
- For information on Web Server browser requirements, see [Server Browser Requirements on page 14](#).

## Hardware Requirements

See the following sections for more information on the hardware requirements for Web Parts for Microsoft SharePoint:

- For information on 64-bit server hardware requirements, see [64-Bit Server Hardware Requirements on page 18](#).
- For information on Web Client hardware requirements, see [Web Client Hardware Requirements on page 20](#).

## Third-Party Requirements

Web Parts for Microsoft SharePoint is supported with the following SharePoint products:

- Microsoft SharePoint Foundation 2013
- Microsoft SharePoint Server 2013
- Microsoft SharePoint Online 2013
- Microsoft SharePoint Server 2016

## Overview

The following sections outline requirements information specific to the Web Server in OnBase Foundation EP5. For general requirements information that applies to both the Web Server and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for the Web Server and Web Client:

- For information on the supported Web Server operating systems, see the **Web/ Application Server** table column in [Supported Desktop Operating Systems on page 11](#).

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**Note:** If the OnBase Web Server is installed on a Windows Server 2012/IIS 8 server and system message functionality is needed, it is recommended that the WebSocket Protocol Windows Server feature is enabled for IIS for optimal performance. See Microsoft documentation for more information on Windows Server features and roles.

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- For information on the supported Web Client operating systems, see the **Web Client** table column in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the web browser requirements for the Web Server and Web Client:

- For web browser requirements for the Web Server, see [Server Browser Requirements on page 14](#).
- For web browser requirements for the Web Client, see [Web Client Browser Requirements on page 13](#).

## Cookies and DOM Storage

Cookies and DOM storage are required when using the Web Client. Each supported browser provides the ability to enable these items.

### Internet Explorer

To enable DOM Storage in Internet Explorer:

1. From the Internet Options dialog box, select the **Advanced** tab.
2. Scroll down to the **Security** section.
3. Select the **Enable DOM Storage** check box to enable DOM storage.
4. Click **Apply**.

To enable cookies in Internet Explorer:

1. From the Internet Options dialog box, select the Privacy tab.
2. Click Advanced.
3. Ensure that Accept is selected in the First-part Cookies and Third-party Cookies sections.
4. Click OK.

### Google Chrome

To enable cookies and DOM Storage in Google Chrome:

1. From the Customize and Control options, select **Settings**.
2. Scroll to the bottom of the screen, and then select **Show Advanced Settings**.
3. From the Privacy section, select **Content Settings**.
4. In the Content Settings dialog box, select the **Allow local data to be set (recommended)** option.
5. Click **Done**.

### Firefox

To enable DOM Storage in Firefox:

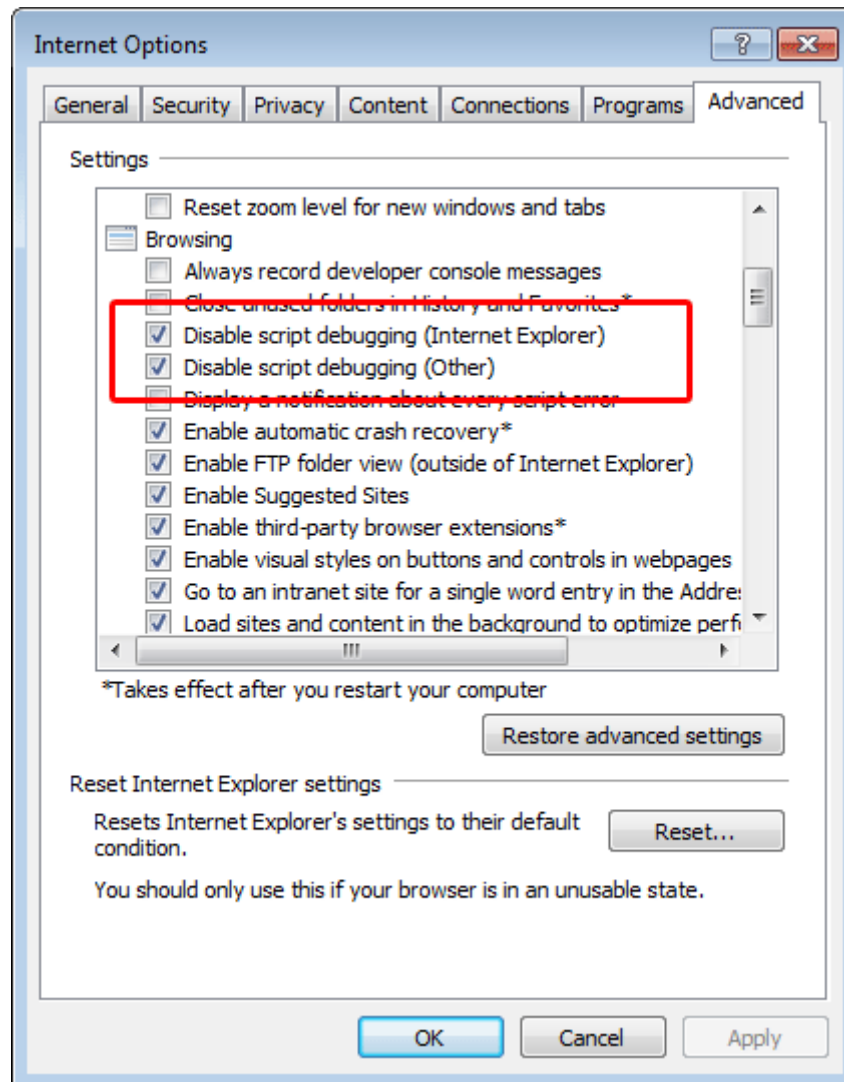
1. Type the following in the subject line: `about:config`.
2. Locate the `dom.storage.enabled` option. The value should be set to True. If it is set to False, right-click the `dom.storage.enabled` option and select **Toggle**.

To enable cookies in Firefox:

1. From the Firefox options menu, select the Options icon.
2. Select the privacy option on the left side of the screen.
3. From the drop-down list in the History section, select the Use custom settings for history option.
4. Ensure that the Accept cookies from sites option is selected.

## Internet Explorer Disable Script Debugging

Internet Explorer Settings must have **Disable Script Debugging (Internet Explorer)** and **Disable Script Debugging (Other)** checked (from Internet Explorer, select **Tools | Internet Options... | Advanced**):



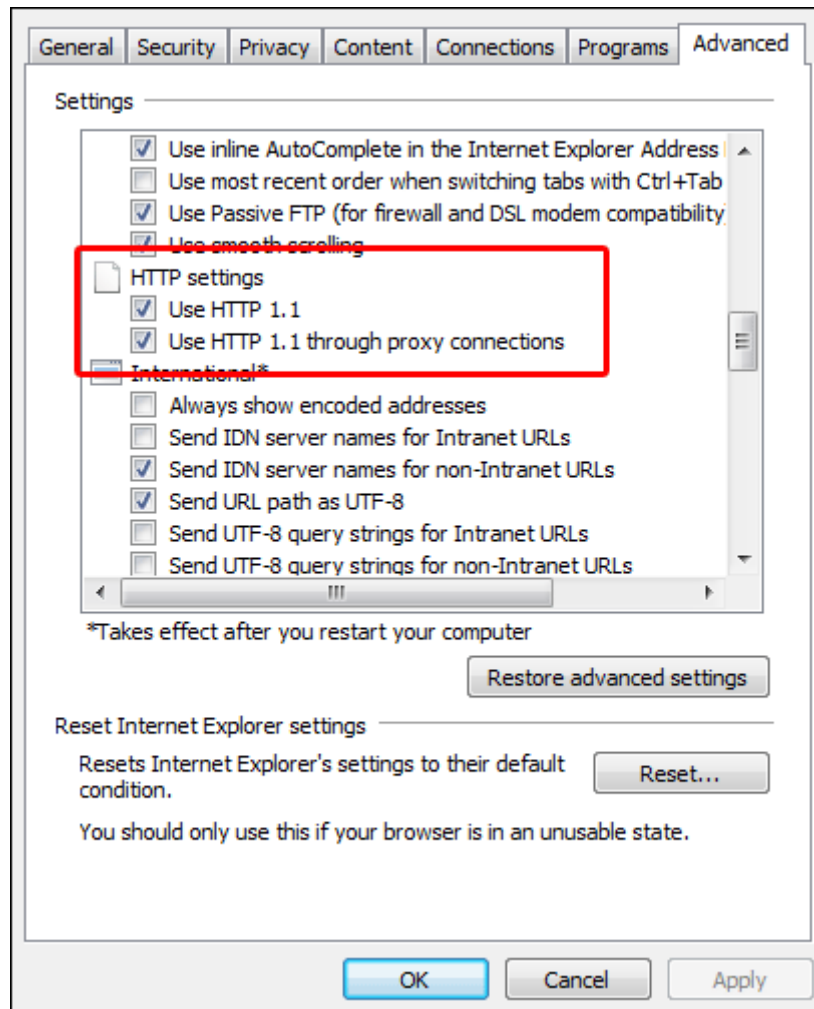
## Proxy Server Setup

Ensure the following items are configured when using a Proxy Server:

**Server side** — If the Web server is using a proxy server, verify that the proxy is setup with HTTP 1.1.



**Client side** — In Internet Explorer, please ensure that **HTTP 1.1 through proxy connections** is checked when using a proxy.



## FormPop and PDFPop Web Browser Requirements

The following web browsers are supported for use with FormPop and PDFPop:

Web Browser	Supported Versions
Internet Explorer	Internet Explorer 11
Edge	EdgeHTML 14 and higher
Firefox	Firefox 28 and higher (including non-ESR versions)

Web Browser	Supported Versions
<b>Safari</b>	Safari 9.1 and higher for OS X and macOS Safari for iOS
<b>Google Chrome</b>	Chrome 29 and higher

## Hardware Requirements

See the following sections for more information on the web browser requirements for the Web Server and Web Client:

- For hardware requirements for the Web Server, see [64-Bit Server Hardware Requirements on page 18](#).
- For hardware requirements for the Web Client, see [Web Client Browser Requirements on page 13](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for the Web Server:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)
- [Windows User Account Control Statement on page 24](#)

## Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Windows 10 Updates

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## Notes on Dedicated Server Hardware

Hyland Software specifies that OnBase Web and Applications Servers be installed on server machines that are dedicated to that sole purpose. We do not support Application Server installations that place other applications, servers, or services on the same physical device.

Web and Application Servers must be dedicated purpose servers; they must not be 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.

The OnBase Application Server, combined with the OnBase Web Server, delivers both static and dynamic content utilizing Microsoft Internet Information Services and Microsoft ASP.NET technology. When both the OnBase Web Server and the OnBase Application Server reside on the same Microsoft Windows Server, high utilization may be seen during peak times. Retrieving search results lists in XML, rendering document images, executing text searches, and various retrieval-related queries place great demand on the Windows Server's hardware, especially the CPU(s) and I/O systems. The server is further loaded down when Microsoft IIS itself is required to perform HTTPS connection services on all content being served to attached browsers through HTTPS connections.

Workflow timers and OnBase processing, both manual and scheduled, should be run on separate servers or workstations. Due to the nature of IIS and how the Web Server utilizes memory, running these processes on the same machine can consume memory, bandwidth, and CPU resources at critical times when users or customers may be accessing the server. The risk of restarting IIS or rebooting the machine must also be kept to a minimum because either of these actions will cause connected users to lose their sessions and possibly lead to data loss.

With all these processing-intensive demands, it is imperative that dedicated server hardware be deployed for each OnBase installation. This will maximize performance, reliability, and maintainability.

## Overview

The following sections outline requirements information specific to Web Services Publishing in OnBase Foundation EP5. For general requirements information that applies to both Web Services Publishing and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Microsoft .NET Framework Requirements

For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).

## Microsoft Visual C++ Requirements

For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Miscellaneous Requirements

See the following sections for general statements on these miscellaneous requirements for Web Services Publishing:

- [Third-Party Software Compatibility on page 23](#)
- [About Virtual Environments on page 23](#)
- [64-Bit Support Statement on page 24](#)

## Overview

The following sections outline requirements information specific to Workflow in OnBase Foundation EP5. For general requirements information that applies to both Workflow and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Workflow:

- For information on the supported databases, see [Databases Supported on page 7](#).
- For information about connection strings, see [ADO.NET Connection Strings on page 6](#).
- For information about file server and database servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Workflow:

- For information on general operating system requirements, see [General Requirements on page 11](#).
- For information on Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the web browser requirements for Workflow:

- For information on Web Client browser requirements, see [Web Client Browser Requirements on page 13](#).
- For information on server browser requirements, see [Server Browser Requirements on page 14](#).

# Hardware Requirements

See the following sections for more information on the hardware requirements for Workflow:

- For information on client hardware requirements, see [OnBase Client Hardware Requirements on page 15](#).
- For information on server hardware requirements, see [Server and Core Services Hardware Requirements on page 17](#).
- For information on 32-bit systems, see [32-Bit Server Hardware Requirements on page 17](#).
- For information on 64-bit systems, see [64-Bit Server Hardware Requirements on page 18](#).

## Module-Specific Requirements

If you will be using Workflow with the Web Client, refer to the Web Server section of **the Installation Requirements** manual.

If you will be using Workflow with the Unity Client, refer to the Unity Client section of **the Installation Requirements** manual.

Refer to the respective sections in the **Installation Requirements** manual if you will be using Workflow with any of the following modules:

- Integration for Microsoft Outlook 2019
- Office Business Application for 2019

## Overview

The following sections outline requirements information specific to Workflow Approval Management in OnBase Foundation EP5. For general requirements information that applies to both Workflow Approval Management and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See the following sections for more information on the database requirements for Workflow Approval Management:

- For information on the supported databases, see [Databases Supported on page 7](#).
- For information about connection strings, see [ADO.NET Connection Strings on page 6](#).
- For information about file server and database servers, see [Database/File Servers on page 8](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for Workflow Approval Management:

- For information on general operating system requirements, see [General Requirements on page 11](#).
- For information on Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Web Browser Requirements

See the following sections for more information on the web browser requirements for Workflow Approval Management:

- For information on Web Client browser requirements, see [Web Client Browser Requirements on page 13](#).
- For information on server browser requirements, see [Server Browser Requirements on page 14](#).



# Hardware Requirements

See the following sections for more information on the hardware requirements for Workflow Approval Management:

- For information on client hardware requirements, see [OnBase Client Hardware Requirements on page 15](#).
- For information on server hardware requirements, see [Server and Core Services Hardware Requirements on page 17](#).

## Prerequisites

This module requires the Workflow module. Refer to the **Installation Requirements** manual for the Workflow installation requirements.

## Overview

The following sections outline requirements information specific to WorkView | Case Manager in OnBase Foundation EP5. For general requirements information that applies to both WorkView | Case Manager and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

### Databases Supported

The following sections list the databases supported by this module in OnBase Foundation EP5.

#### Microsoft SQL Server

The following versions of Microsoft SQL Server™ are supported:

- Microsoft SQL Server 2012 (all service packs)
- Microsoft SQL Server 2014 (all service packs)
- Microsoft SQL Server 2016 (all service packs)
- Microsoft SQL Server 2017
- Microsoft SQL Server 2019

When using Microsoft SQL Server databases, also note the following:

- Azure SQL Managed Instance is also supported.
- Beginning in OnBase Foundation EP1, Microsoft SQL Server 2008 and Microsoft SQL Server 2008 R2 are no longer supported.
- If you are using an ODBC data source to connect to the database, 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 2016, verify that the database client is SQL Server 2016 (or later). Running a previous client version, such as SQL Server 2014, will result in system instability and memory issues. For instructions on determining your server and client versions, see Database Client / Server Version Compatibility.

## Oracle

The following versions of Oracle® are supported:

- Oracle 12c (R2)
- Oracle 19c

When using Oracle databases, also note the following:

- It is strongly recommended that you have a certified Oracle Database Administrator on staff.
- If you are using ODBC drivers with your Oracle database, it is recommended that you select **Bind Timestamp to Date**.

## Database/File Servers

Server requirements are site-specific. Database/file servers should be dedicated purpose servers; that is, these servers should not be used as a domain controller, email server, print server, or proxy server. Network and disk I/O hardware should be optimized for performance and redundancy. Multiple network interface cards on servers are often required to minimize network bottlenecks.

## jQuery

You should not override the version of jQuery that is packaged with OnBase. Overriding this can cause issues in the system. The following is a list of recent OnBase versions and the jQuery version packaged with OnBase.

OnBase Version	jQuery Version	jQuery UI
15	2.0.3	1.10.3
16	2.2.0	1.11.4
17	3.1.0	1.12.1

## Load Balancing

This module supports load balancing across multiple Web Servers and Application Servers. Load balancers must support either IP-based or cookie-based load balancing (also referred to as layer-3, layer-4, and layer-7 load balancing). Load balancers also must be configured to use persistent session (or sticky session) load balancing. For information about configuring your load balancer, refer to its documentation. For information about configuring OnBase modules for load balancing, refer to the Web Server module reference guide.

## Exceptions

In the Unity Client, when the viewer is set to “web”, does not support load balancing across multiple Web Servers or multiple Application Servers.

## Operating System Requirements

See the following sections for more information on the operating system requirements for the WorkView | Case Manager:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, Web Client or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Server C++ Requirements on page 12](#).

## Additional Hyland Timer Service Requirements

The Timer Service workstation requires the Microsoft® .NET Framework 4.5.1 to be installed.

In addition to the Microsoft Visual Studio C++ Redistributable versions required in the general requirements, the Hyland Timer Service has these additional requirements:

- Microsoft Visual C++ 2012 Redistributable (x64)
- Microsoft Visual C++ 2013 Redistributable (x86)
- Microsoft Visual C++ 2019 Redistributable (x64)

## Web Browser Requirements

See the following sections for more information on the Web browser requirements for WorkView | Case Manager:

- If you are using WorkView | Case Manager with the Web Client, see [Web Client Browser Requirements on page 13](#).
- If you are using WorkView | Case Manager with the Unity Client, see [Unity Client Browser Requirements on page 14](#).

## Additional Requirements and Limitations

When using WorkView | Case Manager in a Web browser, also consider the following:

- The WorkView Designer requires Internet Explorer 11.
- In all supported browsers, formatted text labels may become truncated when the length of label exceeds the length of the control.
- The following feature is not supported in Firefox: Cut, copy, and paste functions when used in long text fields.

## Server and Core Services Hardware Requirements

See the following sections for more information on the hardware requirements for WorkView | Case Manager:

- If you are using WorkView | Case Manager with the Web Client, see [Web Client Hardware Requirements on page 20](#).
- If you are using WorkView | Case Manager with the Unity Client, see [Unity Client Platform Hardware Requirements on page 21](#).
- OnBase Studio is required to configure WorkView | Case Manager. See [64-Bit Studio Hardware Requirements on page 21](#).
- WorkView | Case Manager requires access to a licensed OnBase Web Server. See [64-Bit Server Hardware Requirements on page 18](#). For additional Web Server requirements, see the Web Server Technical and Administrative documentation.

# WORKVIEW INTEGRATION FOR MICROSOFT OUTLOOK

## Overview

The following sections outline requirements information specific to WorkView Integration for Microsoft Outlook Foundation EP5. For general requirements information that applies to both WorkView | Case Manager and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

The WorkView Integration for Microsoft Outlook module requires a properly configured OnBase Application Server. In addition, properly configured WorkView applications must be configured. The OnBase Outlook Integration must also be properly installed and configured.

## Load Balancing

### Exceptions

In the Unity Client, when the viewer is set to “web”, does not support load balancing across multiple Web Servers or multiple Application Servers.

## Overview

The following sections outline requirements information specific to XML Index Document Import Processor in OnBase Foundation EP5. For general requirements information that applies to both XML Index Document Import Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for XML Index Document Import Processor:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

If you are setting up a processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).

## Overview

The following sections outline requirements information specific to XML Tag Import Processor in OnBase Foundation EP5. For general requirements information that applies to both XML Tag Import Processor and other modules, see the appropriate sections in [General Requirements Considerations on page 1](#).

## Database Requirements

See [Database Requirements on page 6](#).

## Operating System Requirements

See the following sections for more information on the operating system requirements for XML Tag Import Processor:

- For information on the supported desktop operating systems, see the appropriate table column for the interface you are using (for example, OnBase Client, Web Client, or Unity Client) in [Supported Desktop Operating Systems on page 11](#).
- For information on the Microsoft .NET Framework requirements, see [Microsoft .NET Framework Requirements on page 11](#).
- For information on the Microsoft Visual C++ requirements, see [Microsoft Visual C++ Requirements on page 12](#).

## Hardware Requirements

If you are setting up a dedicated processing workstation, see [Processing Workstation Minimum Hardware Requirements on page 16](#).