
Customer OnBase Upgrade Checklist

NOTE: This document is updated for OnBase version 15.0 installs.

Before the Upgrade

These tasks should be done by the OnBase Administrator (customer) about a week before the upgrade.

- Provide PROFORMANCE with a copy of your OnBase Product License report.
- Verify all workstations & servers have the latest Microsoft service packs. Computers should meet minimum requirements as outlined in the latest OnBase Requirements documentation.
- Verify/install the following Microsoft patches are on all workstations that will be running the thick client (scan workstations, COLD workstations, etc). This can be done days before the upgrade without affecting the current OnBase version.
 - Full version of Microsoft .NET Framework 4.5.1. The compact version is insufficient.
 - Microsoft Visual C++ 2013 Redistribution (x86) patch. This is included in the Full Client installer package downloaded above. The file is vcredist_x86.exe.
- Purge Document Maintenance using the OnBase Client(Admin / Utilities / Document Maintenance / Purge All Remove Files). Perform this task days in advance on a non-critical workstation, it may utilize a workstation several hours to complete this task depending on the amount of documents to be deleted.
- Remove all locks using the OnBase Client / Admin / Utilities. (Document Locks, Process Locks and Batch Locks)
- Run all Reports prior to upgrade. OnBase Config / Reports / Run ALL Reports. This is for additional backup purposes.
- Verify all processing queues are clear. It is preferred that you index and commit all current batches. (COLD, Document Images/scanned, DIP)
 - Awaiting Document Separation
 - Awaiting Index
 - Index in Progress
 - Awaiting OCR
 - Awaiting Commit
- Please back up your scan formats on the scanning workstations. If you are currently on OnBase version 9.0 or later, you can export the scan formats. If you are on OnBase version 8.2 or earlier, you will need to take screen shots of all scan workstation scan formats configuration screens.
- If you are using OnBase Web Server for the first time, the application pool identity needs to have access to the domain account and needs to belong to the Account Operators group.

During the Upgrade

- All users will need to be out of the OnBase application.
- PROFORMANCE will download the upgrade files and place the files in the appropriate directories. PROFORMANCE typically connects to the computer using a GoToAssist connection.
- PROFORMANCE will need to contact Hyland during the upgrade process to get an upgrade validation code.
- Once the upgrade has completed, PROFORMANCE has a check list of items to verify OnBase is working properly.
- PROFORMANCE will then request an End User also verify OnBase is working properly and they can verify the new OnBase version.

After the Upgrade

- PROFORMANCE will request another OnBase Product License Report which will reflect the new OnBase version information.
- Assuming the patches mentioned above in Before the Upgrade are completed, the following updates are required to users' workstations:

Thick Client OnBase Users

- If OnBase is installed locally on their workstation (workstations, COLD, Scan workstations, DIP workstations), an administrator will need to copy the new OnBase files to each workstation. These include OBCLNT32.EXE, OB CFG32.EXE, MZENGR.C.DLL, SNBD18CM.DLL.
- If OnBase is located on a network drive. No changes should be required. We make every effort to install OnBase in its current location so shortcuts to OnBase are not affected.

Web or Thin Client OnBase Users

- If the Web client is configured for HTML controls (and not ActiveX controls), no changes will be required for workstations
- If the system is configured for ActiveX control use and the users are at a minimum "power users" on their workstation, no changes will be required to the workstation. The ActiveX controls will download automatically.
- If the system is configured for ActiveX control use and the users are NOT power users (at minimum) on their workstation, an administrator will need to push the ActiveX components down to their workstations.

Miscellaneous OnBase Users

- Citrix servers will need to have the ActiveX components pushed down if you are using ActiveX controls with OnBase.
- Application Enabler users will need to have the current install removed (OnBase Core Enterprise in Control Panel, Add/Remove Programs) before installing the new version MSI.
- OnBase Desktop users will need to have the current install removed (OnBase Core Enterprise in Control Panel, Add/Remove Programs) before installing the new version MSI.
- Disconnected Scanning users will need to have the current install removed (OnBase Core Enterprise in Control Panel, Add/Remove Programs) before installing the new version MSI.