University of Colorado

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OnBase by Hyland

OnBase Guide - Unity Management Console - Installation and Setup

Goal: To install Unity Management Console and connect to OnBase environments

Complexity Level: Departmental Administrative Users, Departmental Workflow Developers

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Prerequisites

You must have full local administrator access to the machine to perform this installation. If you do not have this access, please ask your local IT staff for support.

Background

Unity Management Console creates Workflow and other timers in OnBase that can trigger scheduled tasks. For more information about Unity Management Console usage, refer to the Unity Scheduler MRG.

Requirements to use Unity Management Console

In order to use Unity Management Console, you must have the *Functional - Admin - System* group assigned to your account. Generally, in order to be a member of this group you will need to successfully complete the OnBase System Administration Training.

Download and Install Unity Management Console

1. Download Unity Management Console from this location. This will always be the latest version of the product.
   https://dm-dev.dev.cu.edu/Clients/Unity_Management_Console.zip

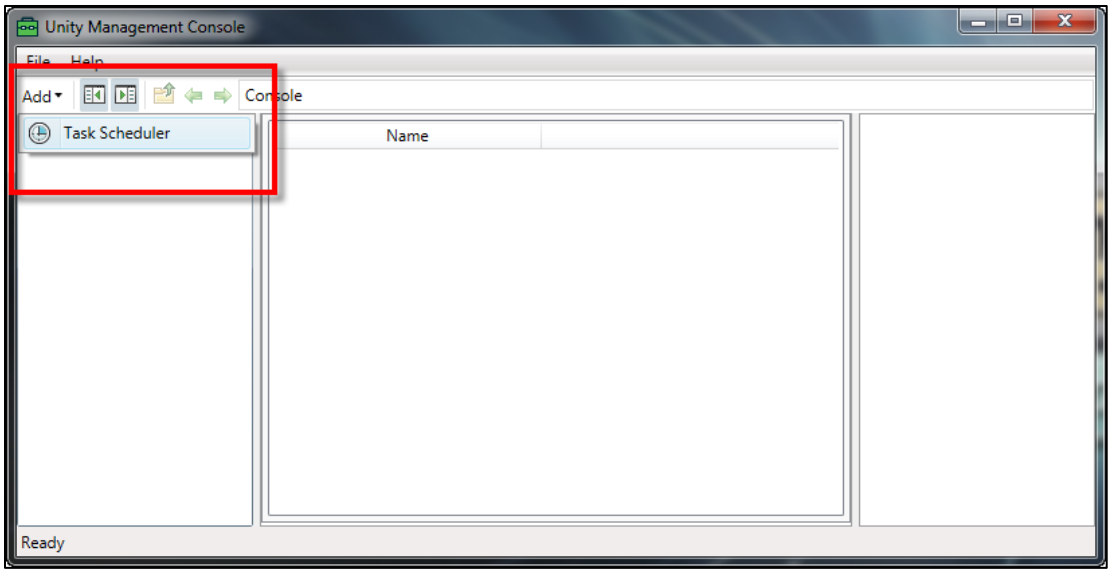
2. Unzip and Install into the default location.

Setup Connections to the OnBase Application Servers

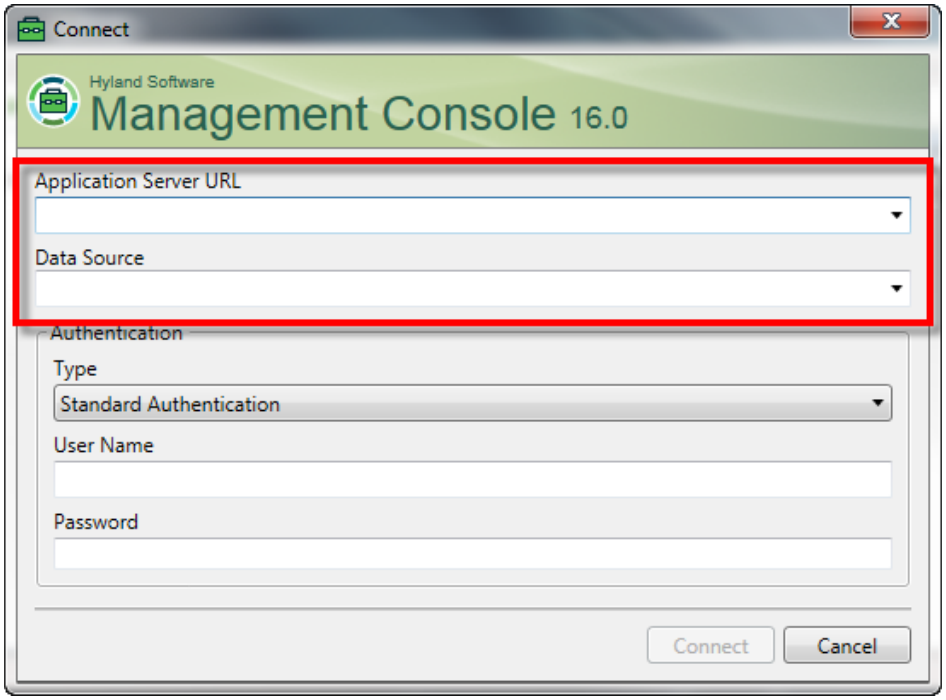
The one install of Unity Management Console allows you to connect to any of the OnBase environments, you simply need to setup the connection strings for each.

1. Launch Unity Management Console from the desktop shortcut.

2. The Unity Management Console uses a “console file” to save settings and connection information. By default, there will be nothing configured. Select the **Add** button on the menu then select **Task Scheduler** to add a new connection to an OnBase environment.



3. On the Connect dialog, you will see two fields that need to be populated for each environment: **Application Server URL** and **Data Source**.



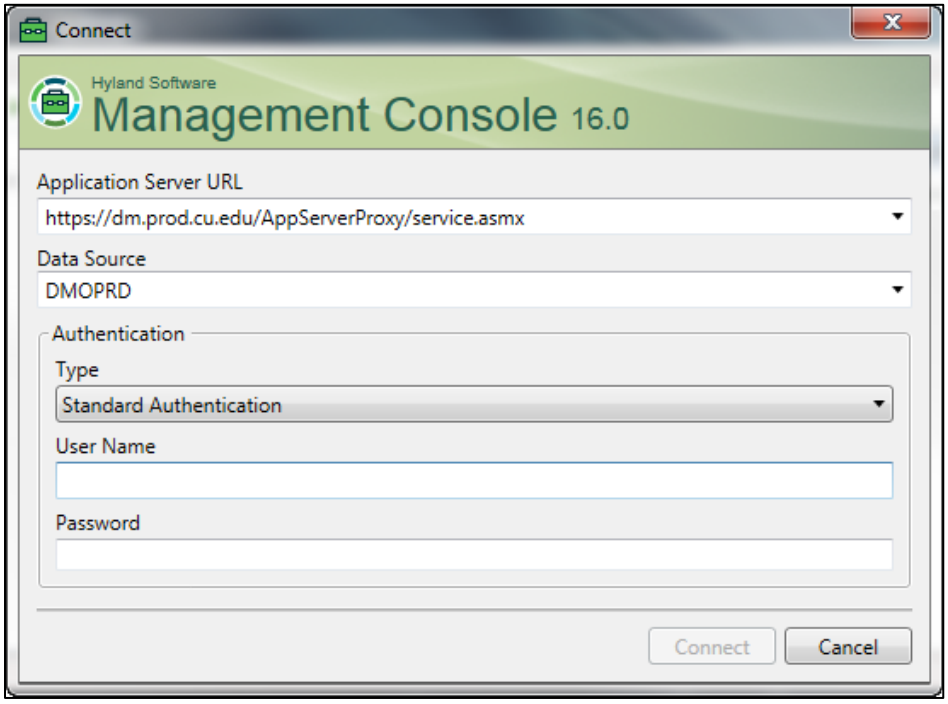
4. In the **Application Server URL** field, paste the URL below for the environment you wish to connect to.

DEV	`https://dm-devapp.dev.cu.edu/AppServer/service.asmx`
TST	`https://dm-tstapp.qa.cu.edu/AppServer/service.asmx`
STG	`https://dm-stgapp.qa.cu.edu/AppServer/service.asmx`
PRD	`https://dm-app.prod.cu.edu/AppServer/service.asmx`

5. In the **Data Source** field, use the corresponding Data Source for each environment.

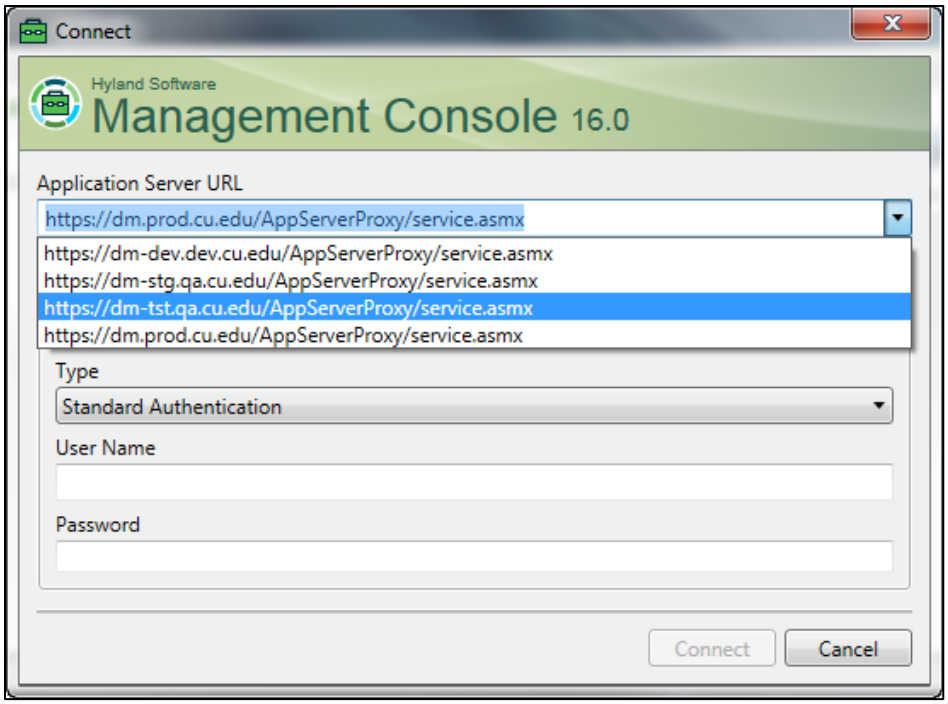
DEV	DMODEV
TST	DMOTST
STG	DMOSTG
PRD	DMOPRD

6. Your Connect dialog should now look like the following.



7. Enter your OnBase credentials in the **User Name** and **Password** fields.

8. Each time you add or use a new connection, it will be saved and can be selected via the **Application Server URL** dropdown menu.

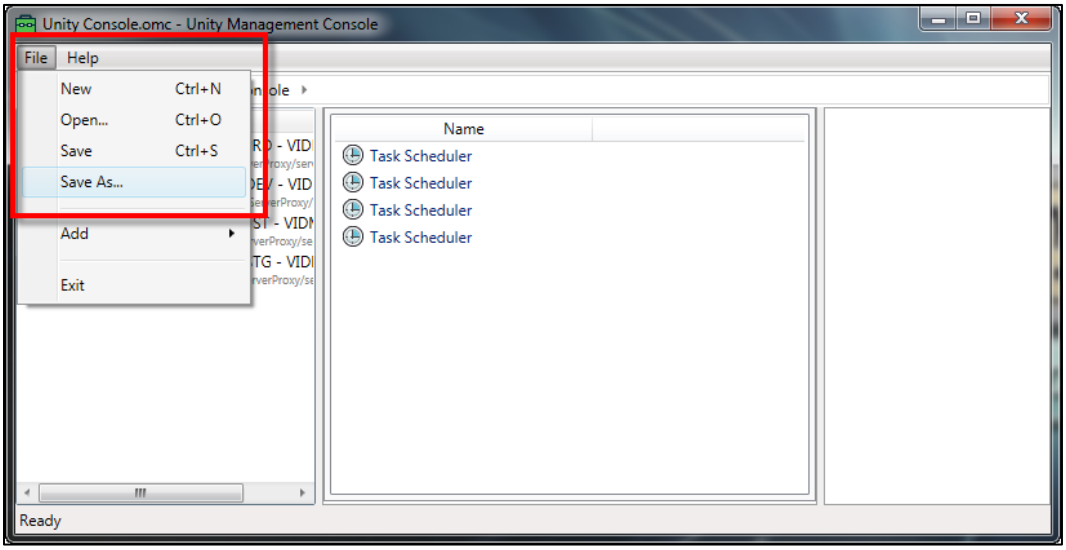


Save the Console settings to a console file

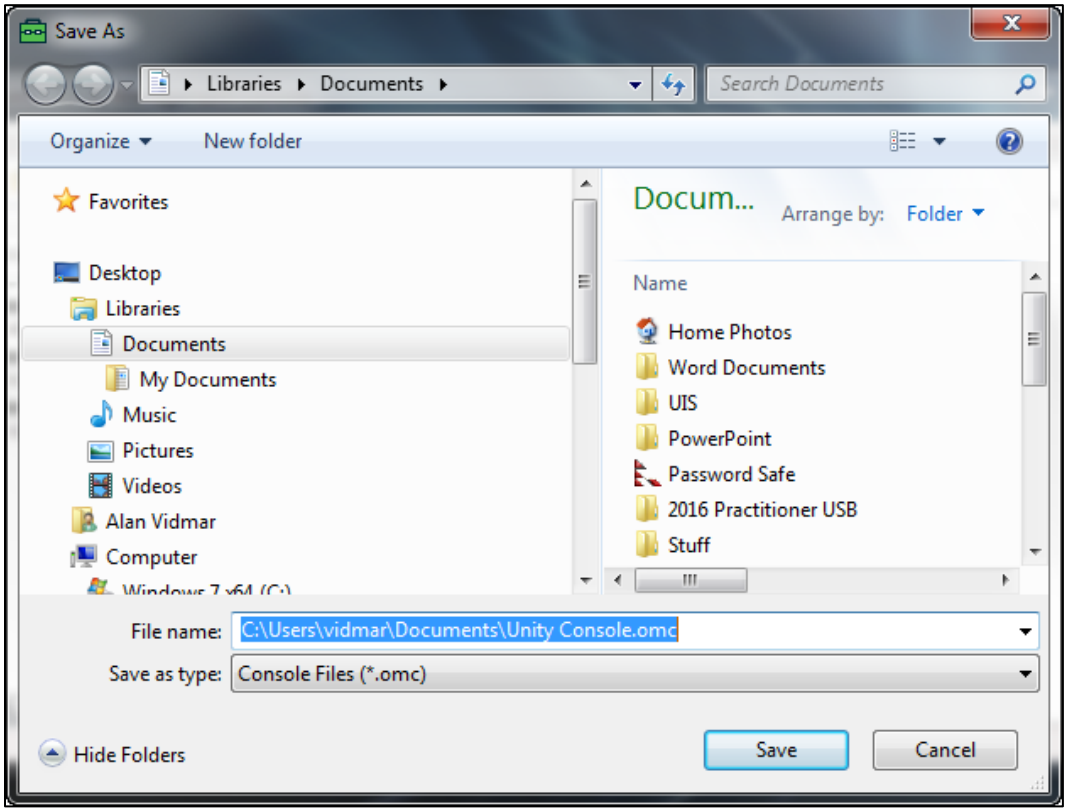
Once you have populated the Unity Management Console with all of the connection details, you will want to save that to a console file so that you can easily open these settings later.

1. Select the **File** menu option.

2. Select **Save As**.



3. Give the file a unique name so that you will know it is for the Unity Management Console. Also place it in a common location like “My Documents.”

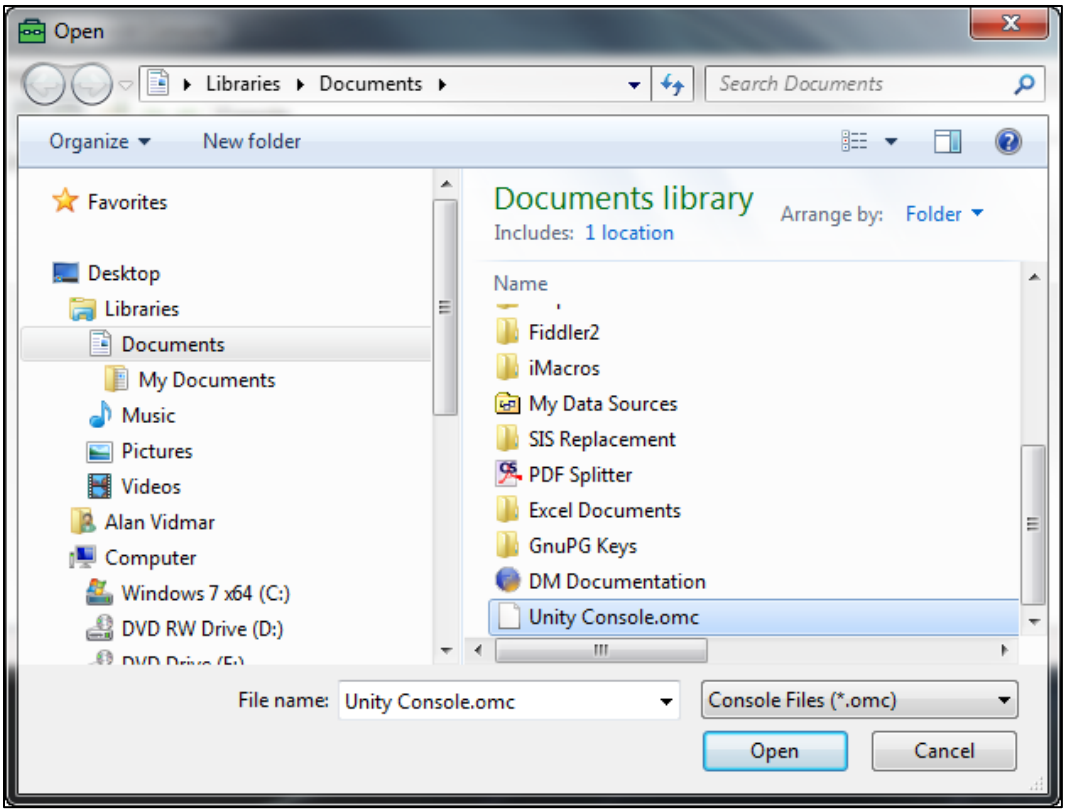
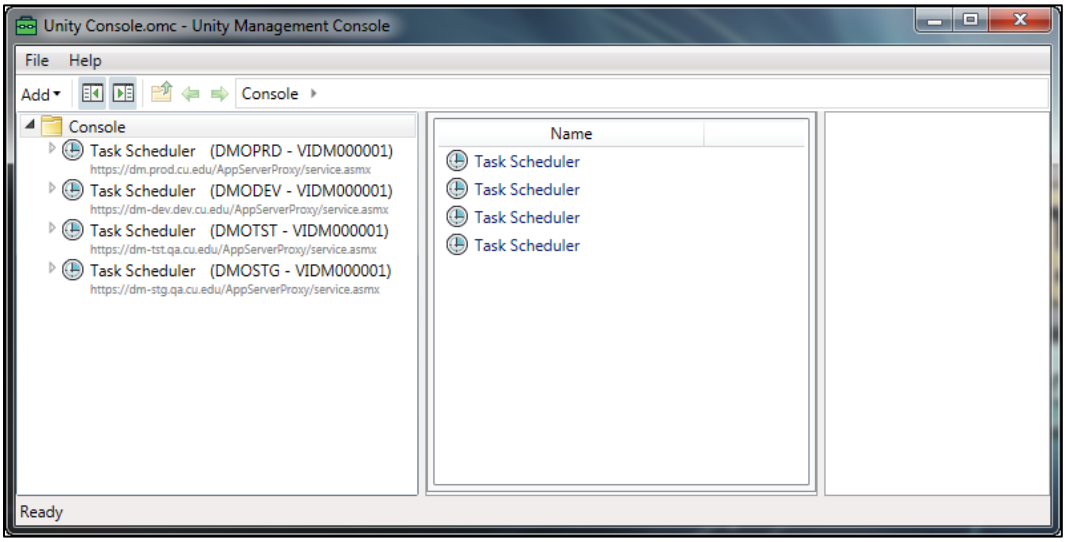


Open an existing console file

Once you have created and saved a console file, you can open that same file the next time you launch the Unity Management Console.

1. Launch Unity Management Console from the desktop shortcut.

2. Click on **File**, then **Open**. Navigate to and select the saved console file.



3. You will now see the connections that have been saved and are ready to use.