Installing and Logging into OnBase Foundation EP3 Single Sign-On Production

OnBase is hosted for Bryn Mawr on Hyland Software’s servers. There are multiple ways to log into OnBase. The OnBase Unity client, available for Windows only, has the most user-friendly and feature-rich interface. At Bryn Mawr we will use the Unity Client whenever possible and most of our documentation will be written for this interface. These instructions describe how to install and log into our OnBase Production environment. Mac users must use the website (Safari is only supported up to version 12.0. FireFox is known to work if you're Safari is updated past 12.0) : https://brynmawr.hylandcloud.com/203IDP/

Removing the Previous Version of OnBase Unity Client

If you have installed the previous version, OnBase 15/16/17/ or 18 without Single Sign-On, it is recommended that you remove that version before installing OnBase EP3. To remove OnBase 18:

1. Follow the instructions under the section "Logging out of and Exiting OnBase" to exit any existing session of OnBase 18.
2. In the Start menu, select Control Panel, then Programs, then Uninstall a program. If your Control Panel is set up to view by icons, select Programs and Features.
3. Scroll down the list and right-click "Hyland Unity Client [BrynMawr]".
4. Right-click on the icon and select Uninstall/Change, then follow the instructions to remove the program.

Installing the OnBase EP3 Unity Client on a Windows Computer

The OnBase Unity Client can be installed from a one-click installer directly from the Internet. Before installing, you will change the security setting for this site to allow OnBase to be installed.

1. Open Internet Explorer (IE). The installer will not work with Firefox or other browsers.
2. On the upper righthand corner of the window, just below the x, you will see three icons. Click on the icon on the right that looks like a gear and select Internet Options.

![Internet Options](image)

3. In the Internet Options dialog box, click on the Security tab, then on the Trusted sites icon.
4. Click on the Sites button, then type in this address (be sure to type the “s” in “https”):
   https://brynmawr.hylandcloud.com
5. Click the Add button and then Close.

6. Still in the Internet Options>Security tab, pull the slider under Security level for this zone all the way down until it says "Low".

7. In IE, navigate to:
   https://BrynMawr.hylandcloud.com/203UnityIDP
8. Click the Install button. If the "Launching Application" message doesn't come up immediately, check the bottom of the window for any messages and click the appropriate response.
9. When the Application Install – Security Warning appears, check the information and click Install.
Logging Into OnBase

You can access the OnBase EP3 client in the same ways you always have. Your username and password are the same as on the Bryn Mawr network.

1. Before logging in, follow the instructions under the section "Logging out of and Exiting OnBase" to exit any existing session of OnBase.
2. Use one of the following methods to start OnBase:
   - Double-click on the shortcut for “Hyland Unity Client [BrynMawrIDP]” on your desktop.
   - In the Start menu, select All Programs, then the Hyland folder, then “Hyland Unity Client [BrynMawr].”
3. When the OnBase login screen appears, enter your username and password (same as your Bryn Mawr username and password) and follow the Duo prompts.
4. When OnBase launches, always check for “OnBase (BrynMawrIDP)” on the title bar of the window to make sure you are on the correct server.

Application Enabler

Application Enabler is a module that allows OnBase to open documents from a PeopleSoft screen. The configuration for the program is on the S: drive. If you are not on the campus network, or do not have access to this file, you will see this error:

This file is not necessary to use OnBase, so you can ignore it. Click OK, and then Cancel in the next screen to locate the file. The OnBase login screen should then appear, and you can log in normally.
Logging Out of and Exiting OnBase

Once you have installed OnBase, it will start up every time you start your computer. However, you will not be logged into the OnBase server until you enter your credentials in the login screen. When you close the OnBase window by clicking on the “X” in the upper right hand corner, it does not log you out; you can still launch the application without entering your username and password, until you shut down your computer or log out of your Windows account.

To log out of OnBase so others cannot access it if they gain access to your computer:

1. On the lower right hand corner of your screen, in the Windows System Tray, there is a small arrow pointing upward. Left-click on that arrow to see the programs that are running “in the background”.
2. Right-click on the OnBase icon there to see the menu options.
3. To log out of OnBase but leave the program running in the background, click “Log Out”.
4. To quit the program so it is no longer running in the background, click “Exit OnBase”.
5. If you have logged out of OnBase, or simply closed the OnBase window by clicking on the “X”, select “Launch Unity Client...” to open OnBase quickly.

Related Documentation

Faculty and staff using OnBase can access documentation at S:\Public Shares\OBOL\Documentation. For more detailed documentation from Hyland, or if you do not have access to this folder, please contact Helpdesk. For more information on uploading email and other documents to OnBase, refer to the document “Uploading Emails and other Documents to OnBase.docx” in the OnBase documentation folder.