

# ONBASE

## UNITY BRIEFCASE

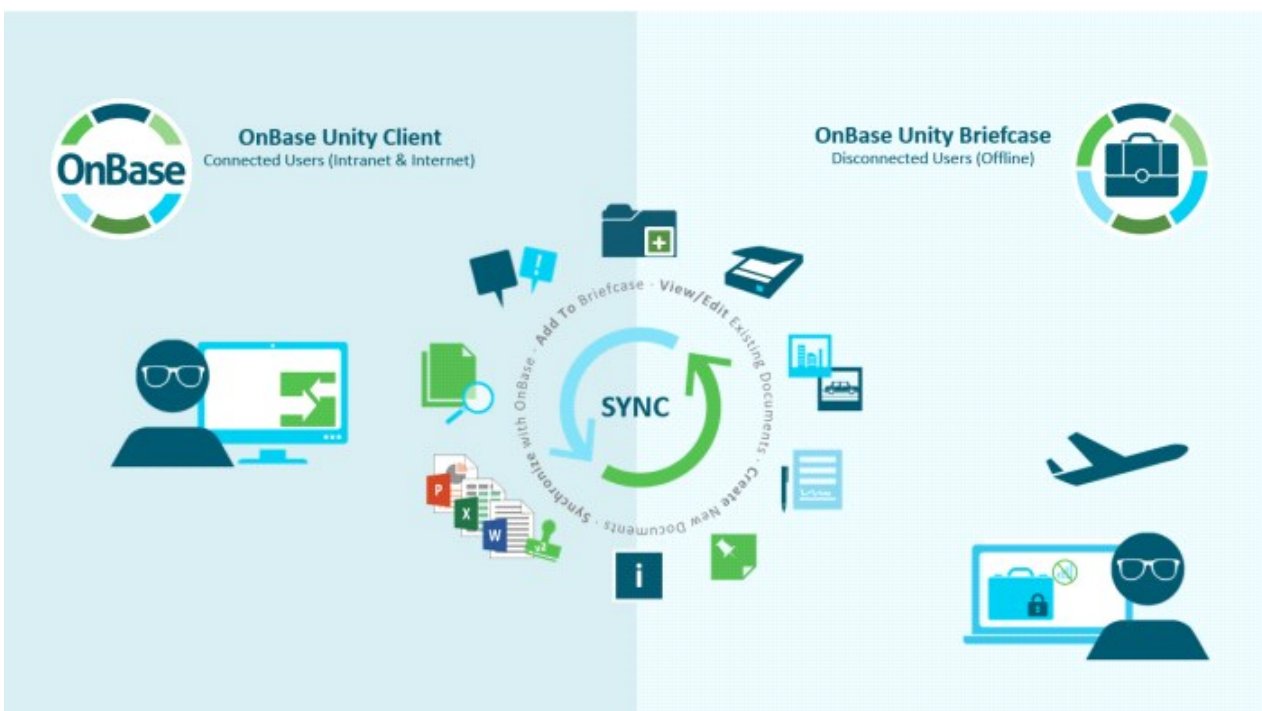
### SUMMARY

The Unity Briefcase gives traveling and field employees portable, offline access to OnBase documents, forms and features. When disconnected from OnBase, Unity Briefcase users can update or add notes to documents, create and sign new electronic forms and upload photos. This jumpstarts processes that depend on offsite data collection, driving out delays that result from duplicate data entry or missed paperwork. And documents taken offline for field use are still available to onsite OnBase users. When back in the office, field staff simply synchronize offline documents back into OnBase—and their business process workflows—properly revisioned.

### BENEFITS

- **Provide secure offline access to OnBase documents and processes** storing encrypted content for disconnected, field workforces.
- **Boost traveling staff productivity** by making documents available online and offline, without the risk of overwriting data.
- **Eliminate stalled business processes** by electronically capturing documents and data earlier in the business process.
- **Reduce printing costs and paper process resource drains** by using electronic copies and creating electronic forms.
- **Uphold tight audit control** by tracking disconnected document changes and posting to document history upon synch.

### DESIGN



1. While connected to OnBase through the OnBase Unity Client (online), users add documents to Unity Briefcase.

- From the Unity Briefcase, when disconnected (offline), users can reference those documents and/or modify them. They can also view keywords, add notes/annotations, create E-Forms, Unity Forms and other OnBase documents or upload new documents from a scanner or camera.
- Back online, users can synchronize any changes—with revisions if necessary—without the risk of overwriting work.

## APPLICATIONS

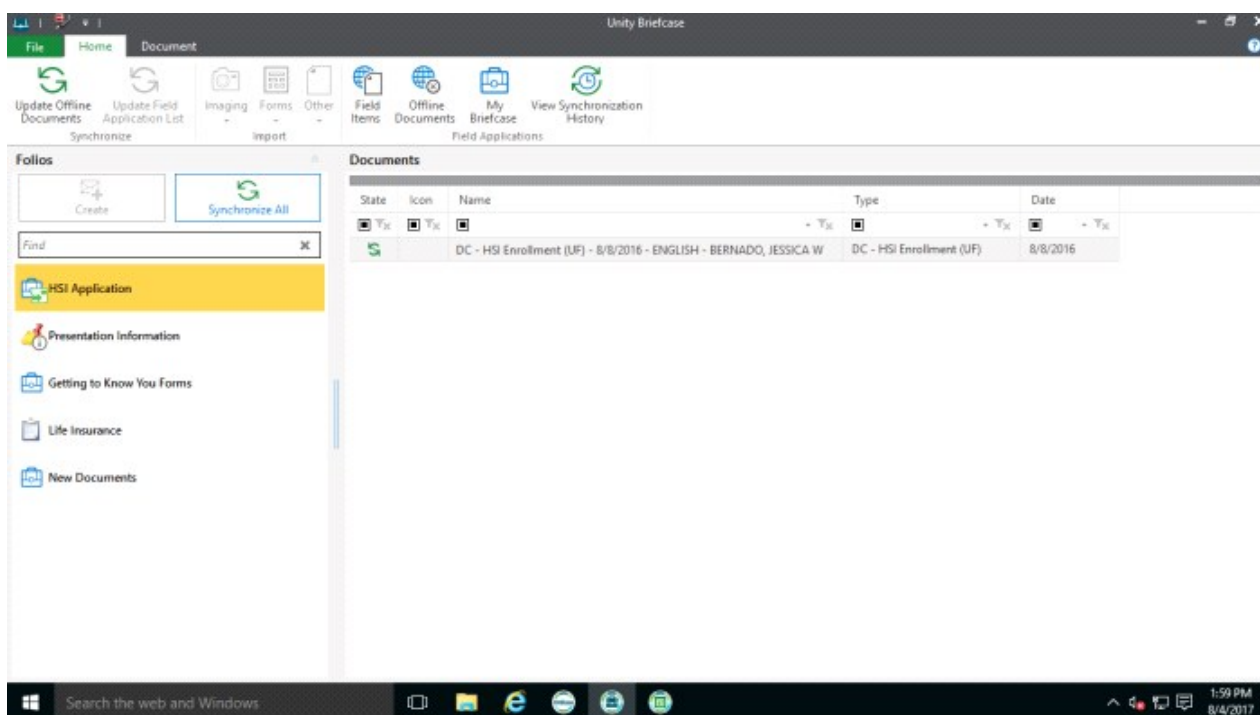
Staff who are regularly on the road—from sales forces, to HR recruiters or visiting nurses—benefit from Unity Briefcase. Examples:

- **Property Management Auditors/Building Inspectors:** Staff maximize time on the road and minimize office time for paperwork. They visit properties, fill out e-forms and upload pictures to chronicle violations—like cracked ceilings or ADA noncompliance.
- **Insurance:** Sales agents visit client homes when selling life insurance policies, typically involving an application (E-Form) that requires a signature to complete the transaction. Claims adjusters document incidents onsite; documents and forms instantly enter underwriting workflows upon synch.
- **Health and Human Services:** Child welfare workers easily ensure they have what they need for site visits. In addition to bringing all case documents along, they can fill out new electronic forms or even add photos to the case file—right there at the home.

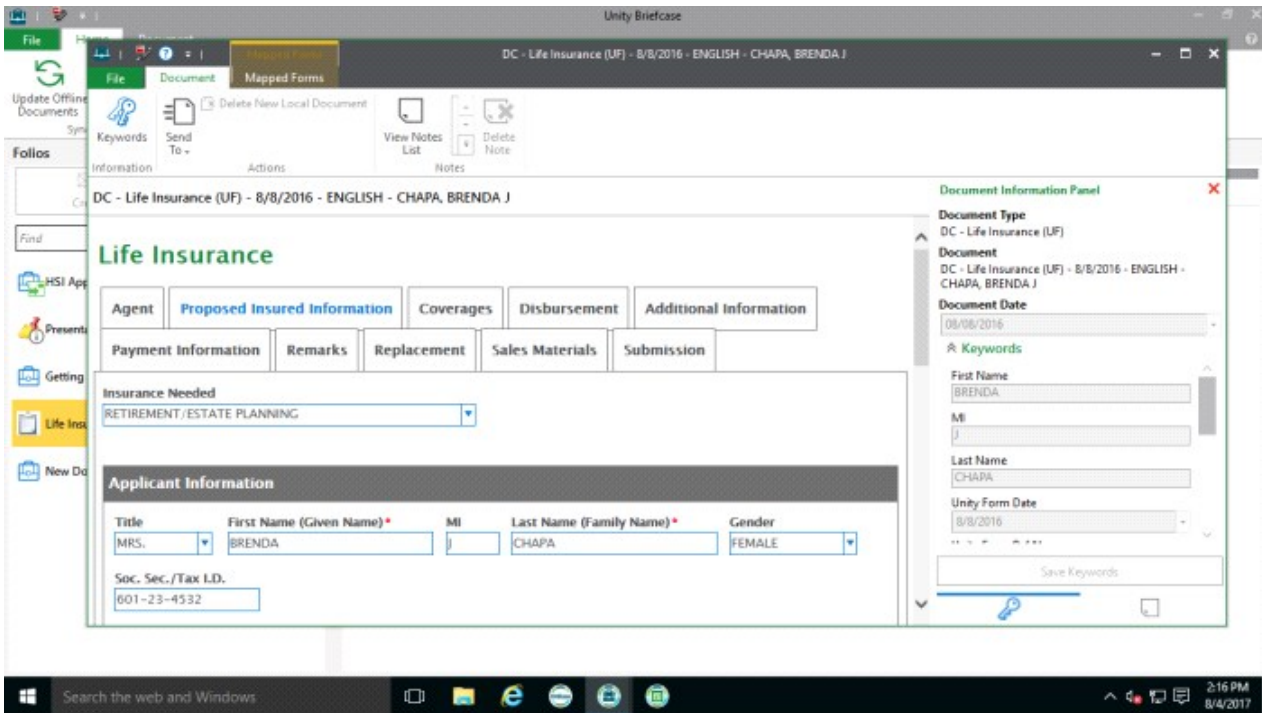
## KEY FEATURES

- **Create and edit OnBase documents, including forms,** while offline, capturing data, documents and signatures electronically at origination (beginning of a business process).
- **Perform ad-hoc scan and document capture** from cameras and other storage devices while offline.
- **Keywords, notes and annotations available offline** via the familiar Unity Document Viewer.
- **AutoFill Keyword Sets available** to automate indexing for new documents and forms created offline.
- **Workflow Queues send documents to Briefcase** facilitating automatic work assignment for disconnected users.
- **Synchronization inserts new documents into Workflow** processes, instantly.

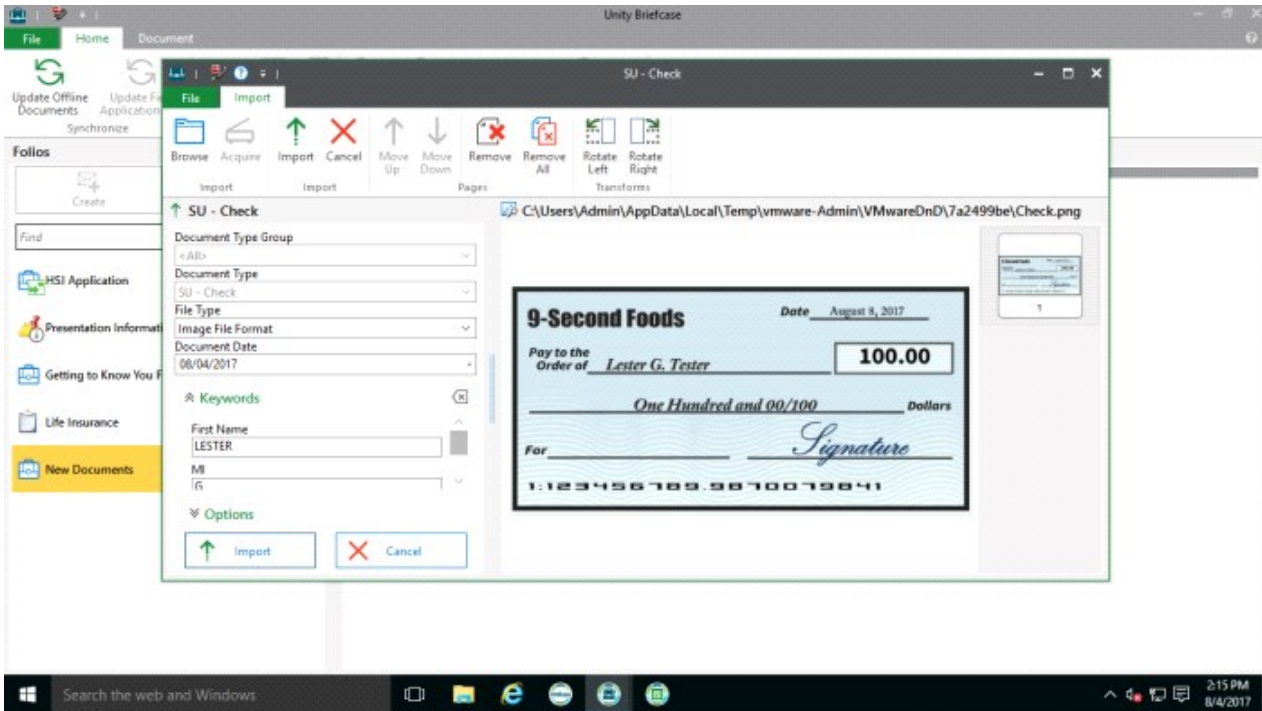
## INTERFACE



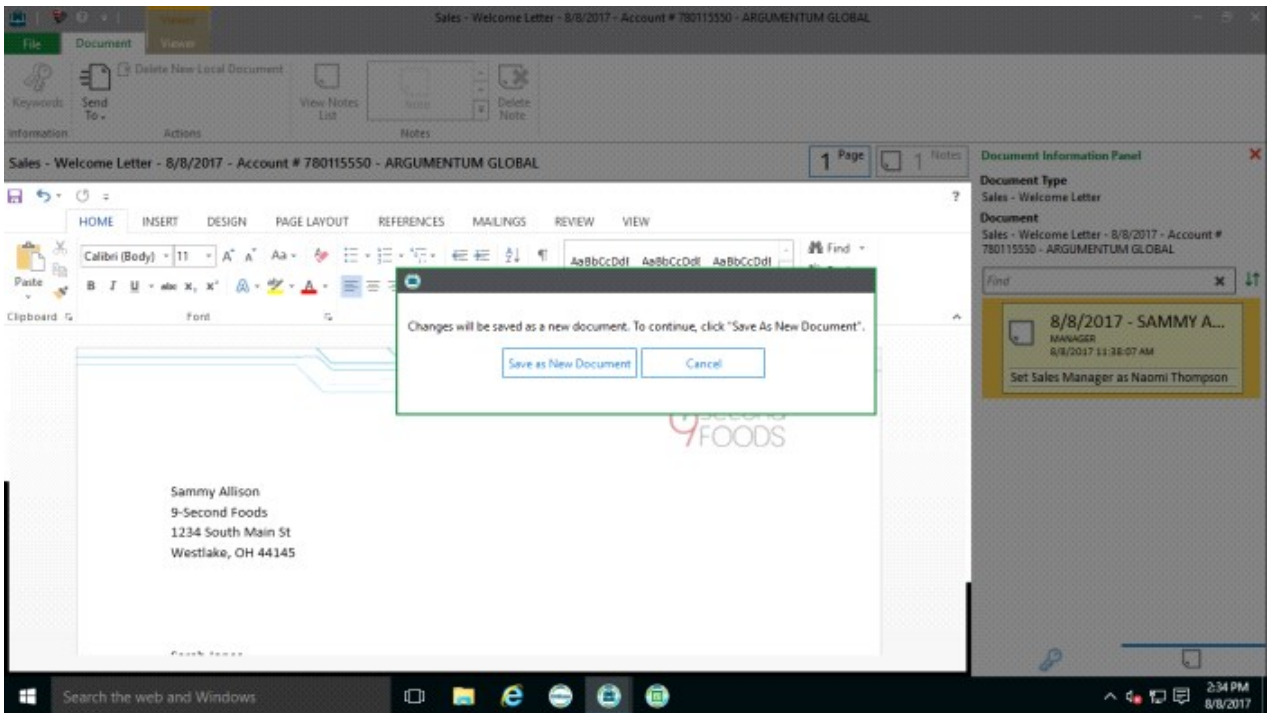
Access "Folio" of Offline Documents from Unity Briefcase while disconnected.



Create new and edit existing OnBase electronic forms while offline. Changes take effect once connectivity is re-established.

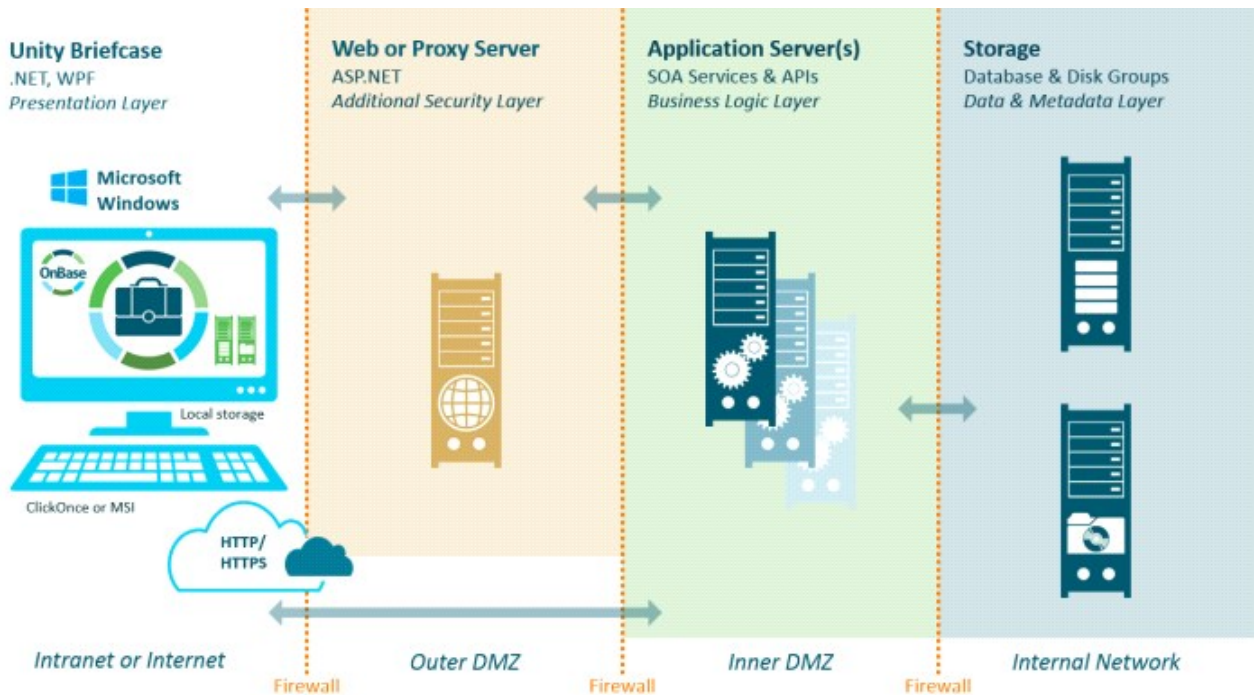


Browse to or Acquire images from the file system, camera or scanner. Documents enter OnBase upon synchronization.



*Add/modify/delete OnBase Notes and Save as New Document or create Revisions while disconnected.*

## ARCHITECTURE



The Unity Client connects to the OnBase Database and Disk Groups via the Application Server, which centralizes ODBC transactions and Disk Group access, as well as efficiently handles all business process logic. Optionally, a Web or Proxy Server can be used for an additional layer of security.

The Unity Client is a Windows-based desktop application that stores interface components on the client machine, but ClickOnce (or MSI) technology enables rapid installation to user workstations. Regardless of whether the solution is on-premise or hosted, the Unity Client can be quickly deployed over a WAN across an internal network, or via the Internet using HTTPS over a firewall.

The Unity Briefcase provides disconnected users with offline access to OnBase documents, forms and features. The Unity Briefcase is also a Windows-based desktop application installed on the (same) user workstation and is used to access offline content. Data and documents added to the Unity Briefcase are stored in a fully encrypted, local storage system that includes an offline database and disk group (file share).

When a connection is established, any changes made to data and documents can be synchronized between the Unity Client (OnBase Database and Disk Groups) and the Unity Briefcase (local storage system).

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