

# ONBASE

## UNITY CLIENT

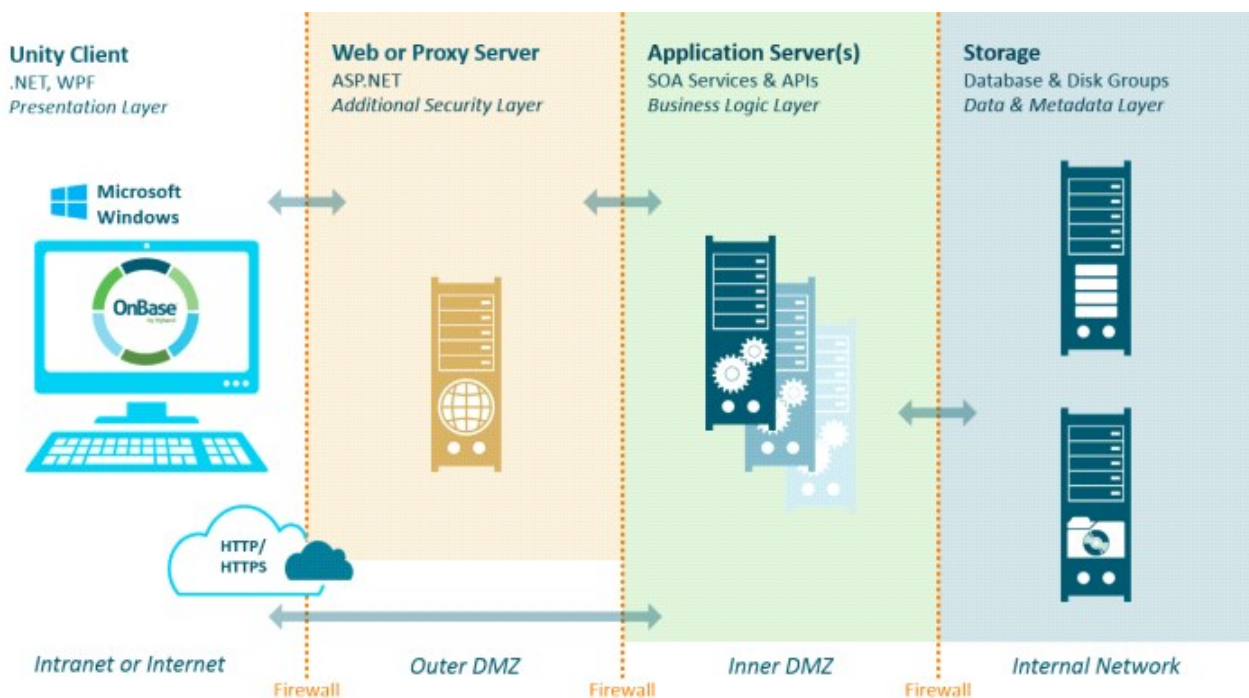
### SUMMARY

The Unity Client is a modern OnBase desktop application, offering the familiar look-and-feel of Microsoft Office products. With intuitive ribbon-style toolbars and tabs and easy access to features, users can easily navigate and perform their primary job tasks with little-to-no training. Unity Client also enables individual users to personalize their interface in order to quickly access the forms and functions they use most often. Installation and administration are simplified with WAN optimized deployment options that support ClickOnce (or MSI) technology for both on-premise or hosted environments.

### BENEFITS

- **Simplifies OnBase access, promoting ease-of-use** by presenting OnBase features where users expect to find them.
- **Increases adoption and minimizes training and support**, leveraging user-familiarity with Windows Office products.
- **Improves productivity** by providing a personalized, task-centric interface with integrated Workflow functionality.
- **Saves IT deployment time and costs** with rapid rollout and upgrades using Microsoft's ClickOnce technology.
- **Works the way organizations require**—from platform to features—with hosted, on-premise and offline solutions.

### DESIGN



The Unity Client is a next-generation OnBase "smart" client built atop Microsoft's .NET platform and Windows Presentation Foundation (WPF), using eXtensible Application Markup Language (XAML). In addition to creating an enhanced user experience, these latest technologies enable an efficient, scalable architecture designed to meet any business requirements.

### APPLICATIONS

- **New OnBase customers:** Prospective customers already familiar with Windows-based applications and/or Office

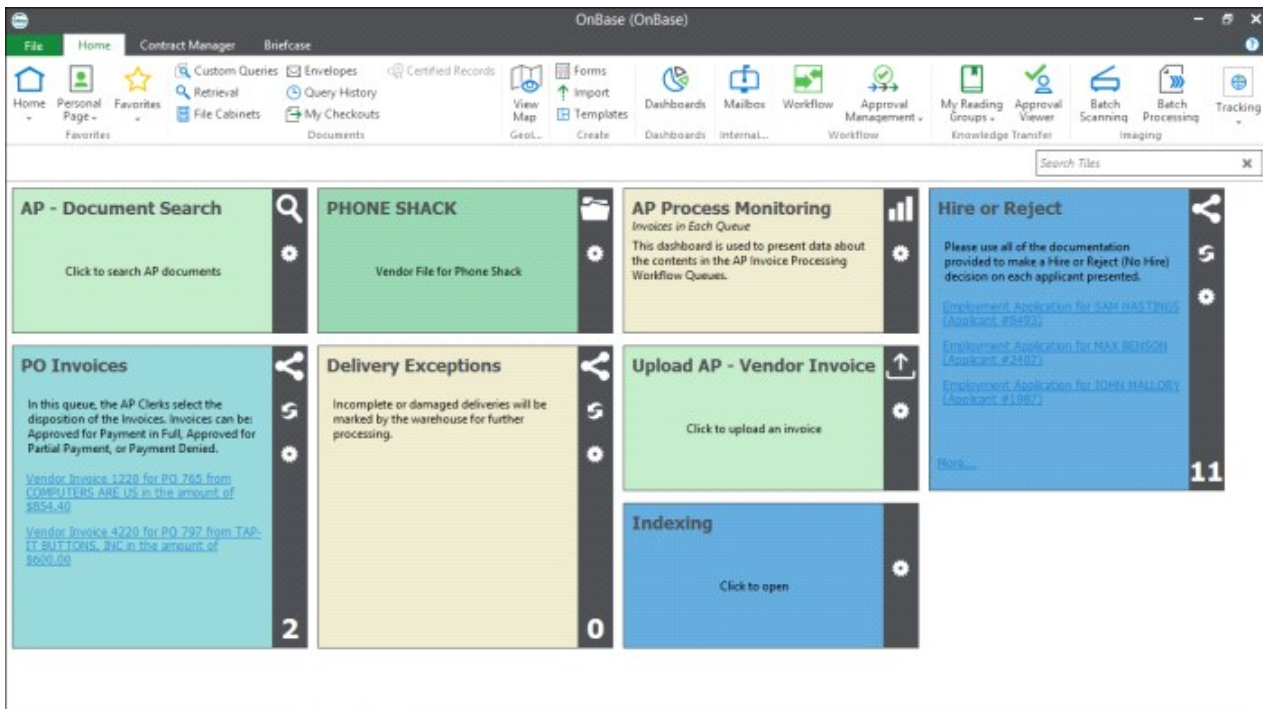
products will instantly be comfortable using the Unity Client, as the interface provides similar ribbon, tab and theme features.

- **On-Premise deployment:** Using ClickOnce technology, the Unity Client deploys quickly and easily to thousands of internal users. The Application Server provides centralization of ODBC transactions and Disk Group access, which can improve performance over a Wide Area Network (WAN).
- **Hosted deployment:** Customers that desire a Windows-based desktop user interface within a SaaS offering will be able to deploy the Unity Client via ClickOnce to meet their requirements. The Unity Client sits on the client machine, while the Application Server, Database and Disk Groups can all be hosted via OnBase OnLine and made available over the Internet via HTTPS.

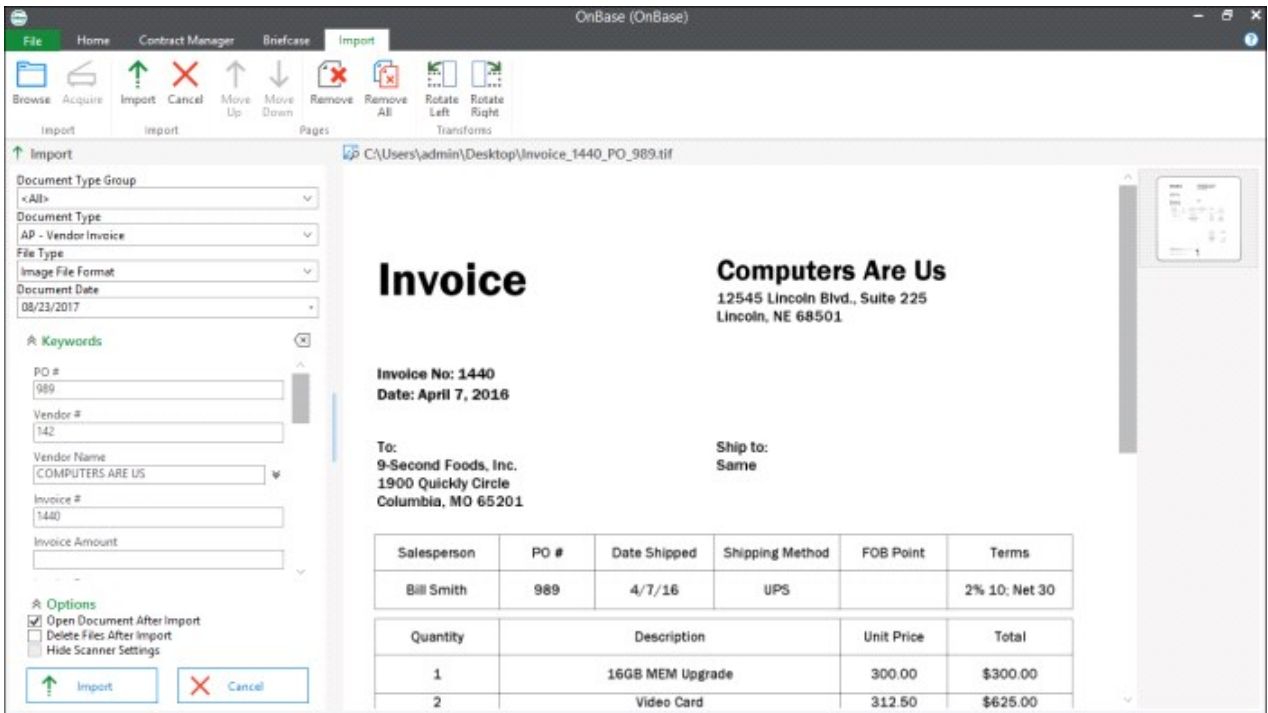
## KEY FEATURES

- **Familiar Windows-based, Office-like interface** provides OnBase functionality including Document Retrieval, Custom Queries, Folders and Workflow through ribbon toolbars, tabs, favorites, home, and personal pages—enhanced with rich sorting/grouping/filtering capabilities.
- **Integrated Workflow** presents related items and task buttons (with user interaction) from selected documents.
- **Information Panel** displays keywords, notes, cross-references and discussions alongside a hit-list or open document.
- **Import Preview** displays the document in a preview pane for review and to research index values (aids indexing).
- **Supports Offline applications**, including the Unity Briefcase, Integration for Allscripts Homecare, etc.
- **Secure, Scalable Architecture:**
  - **Efficient business process logic handling**—the Unity Client connects to the OnBase Database and Disk Groups via the Application Server, which centralizes ODBC transactions, file share access and efficiently handles all business process logic. Optionally, a Web or Proxy server can be used for an additional layer of security.
  - **Ease of administration/installation**—even though the Windows-based desktop application stores interface components on the client machine, ClickOnce (or MSI) enables rapid deployment. Regardless of whether the solution is on-premise or hosted, the Unity Client can be quickly deployed on a WAN across an internal network, or via the Internet using HTTPS over a firewall.

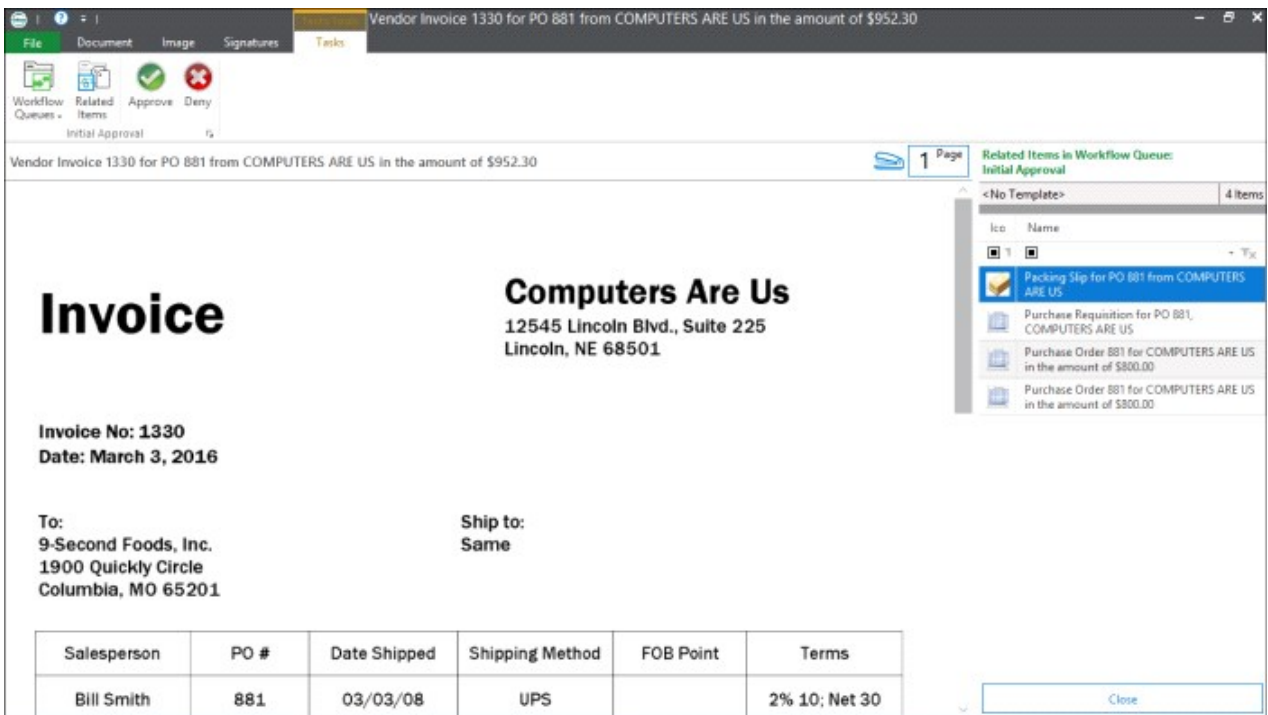
## INTERFACE



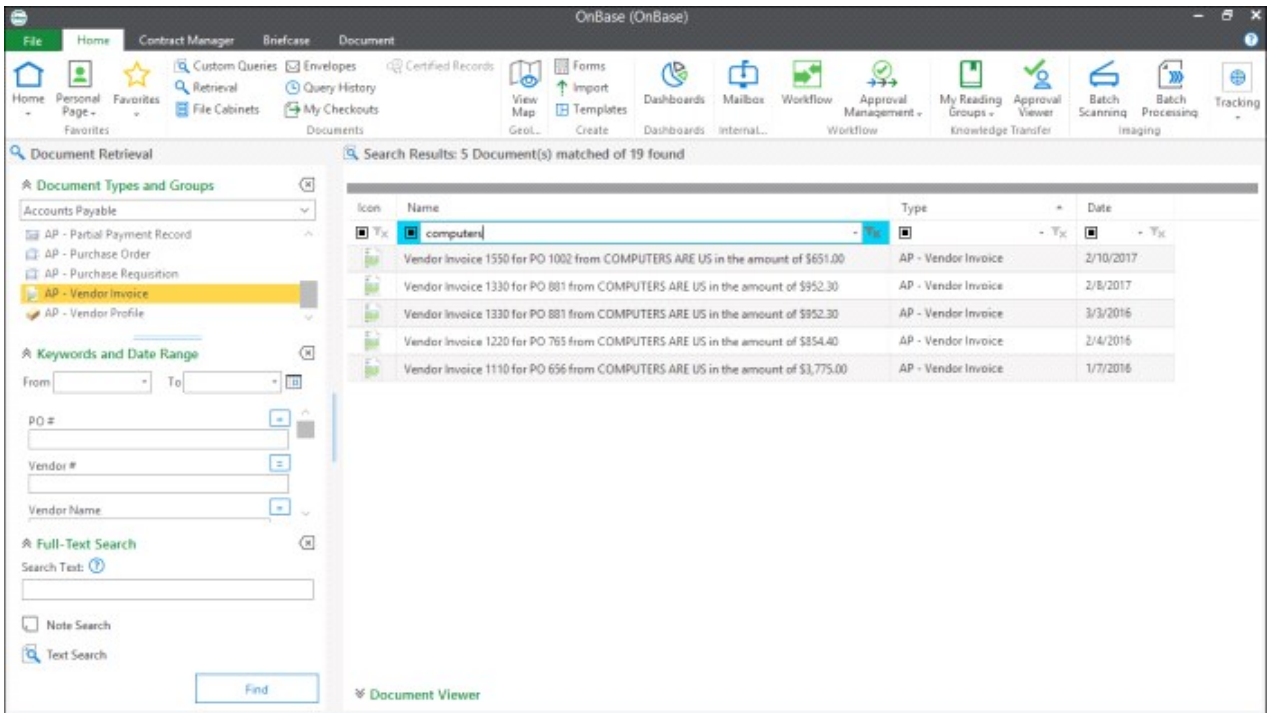
'Personal Page' provides ability to create shortcut tiles to frequently used documents, forms and features



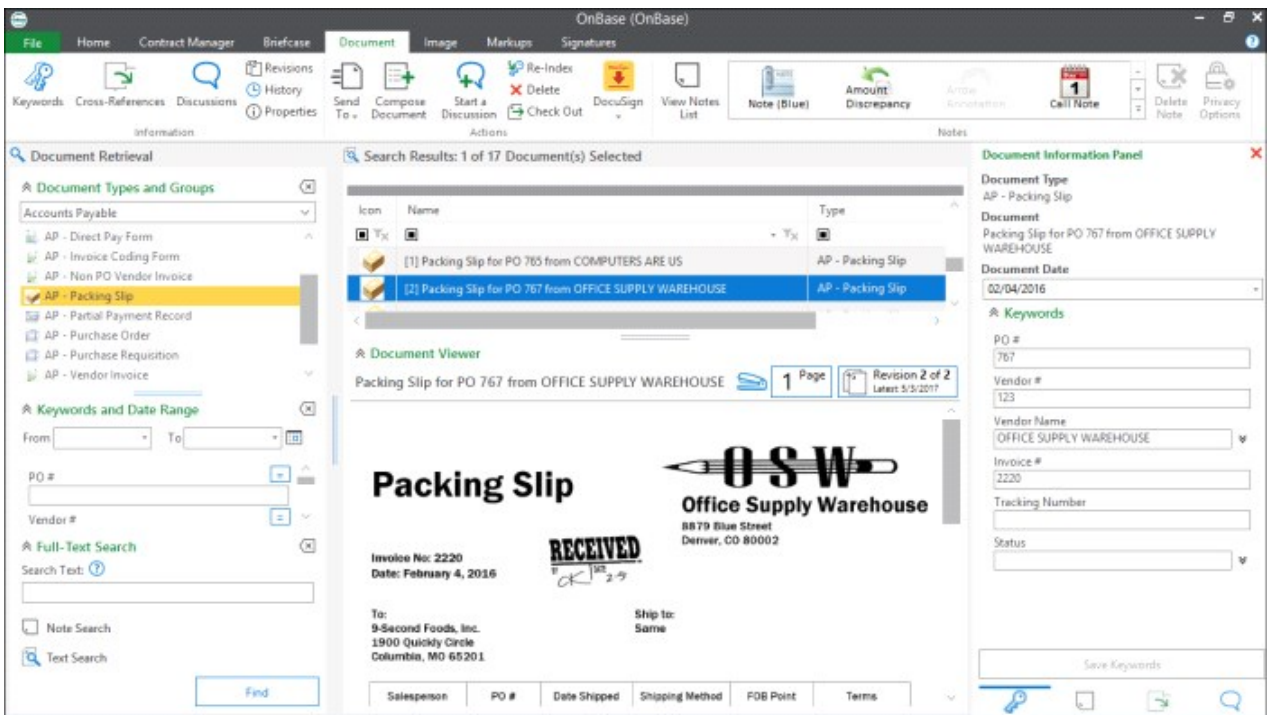
Import via 'Browse' to file, 'Acquire' from device or drag/drop to layout with option to 'Open Document After Import'



Document Viewer displays available Workflow 'Tasks' and Related Items

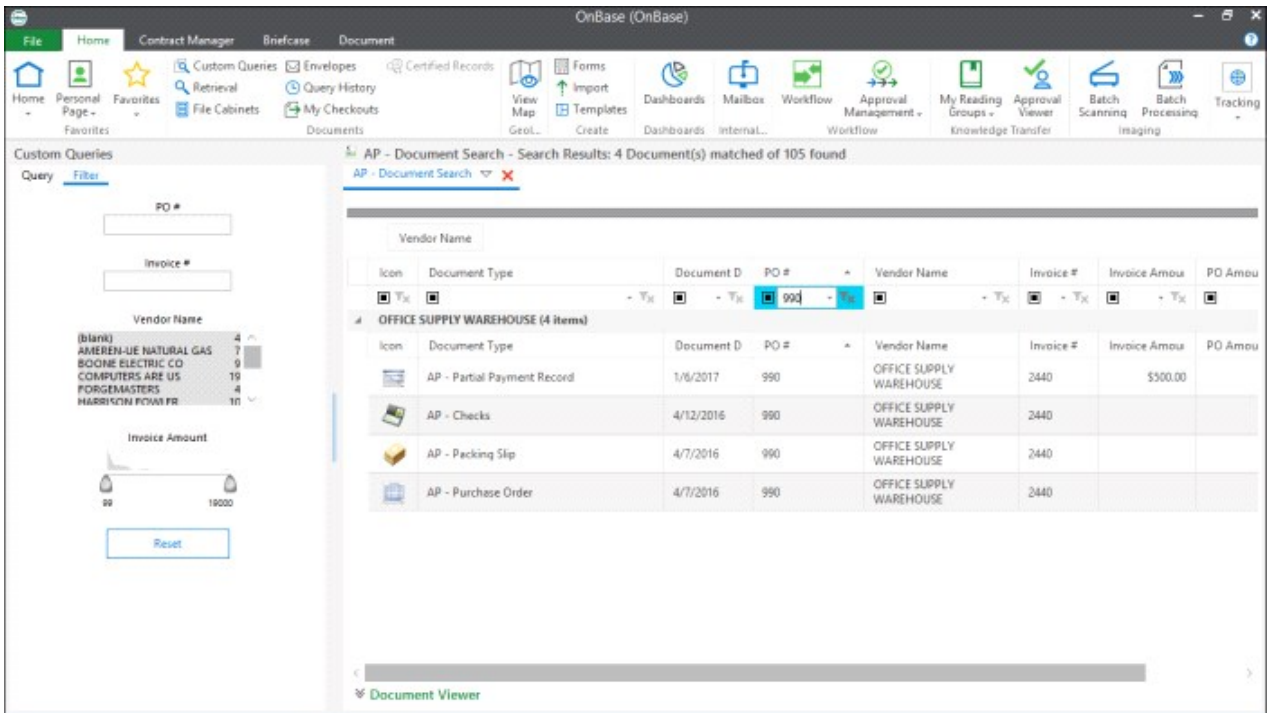


Document Retrieval Search Results list with Column Filtering

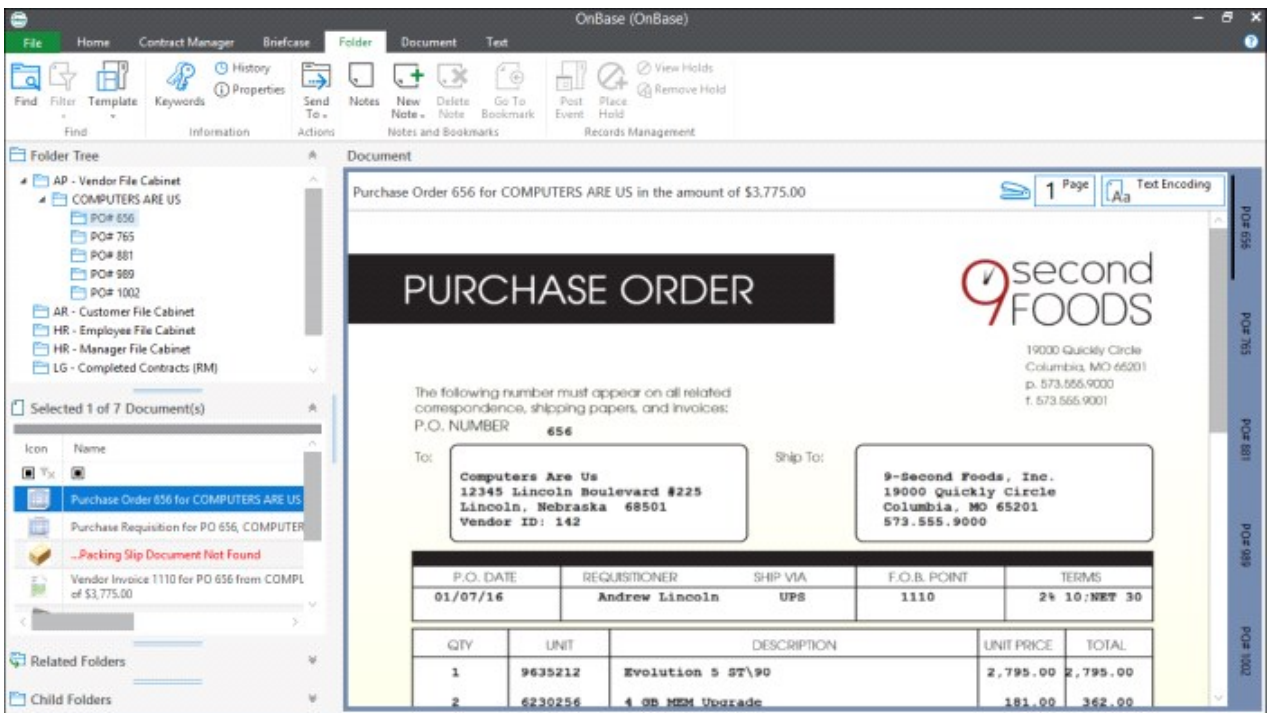


Embedded Document Viewer with 'Document' tab and Document Information Panel





Custom Query with Text, Instance & Pinch Filters, Grouped Column Display and Column Filtering



File Cabinets with 'Folder' tab and features, including identification of missing documents

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