



intellective®

DIGITAL INTEGRATION MADE SIMPLE



**Intellective  
Unity 8 Overview**



# WHO WE ARE

Since 2005, Intellective has been solving complex business challenges with Fortune 1000 companies across multiple industries. Our global team of elite technologists provides digital integration and transformation solutions to companies in North America and Europe.



~150 Elite Technologists

- Offices in 5 Countries
- Expertise in ECM/BPM implementation
- Expertise in Integration disparate apps, repositories, CRMs, ECMs, and BPMs systems
- Suite of proprietary Integration Framework products

## Our Culture

### Customer Success

We challenge ourselves every day and within every task to find ways to help our customers realize their vision

### Trust & Integrity

We do what we say we will do, treat each other with respect, and always act with honesty and transparency

### Delivery Excellence

For our customers and each other, we deliver results that delight

### Teamwork

We achieve our dreams by working together every day as a cohesive team

### Thought Leadership

We are the foremost authority in everything we do

### Fearless & Bold

We think bigger than we did yesterday and continue to amaze

## Our Partners



## Healthcare



## Insurance

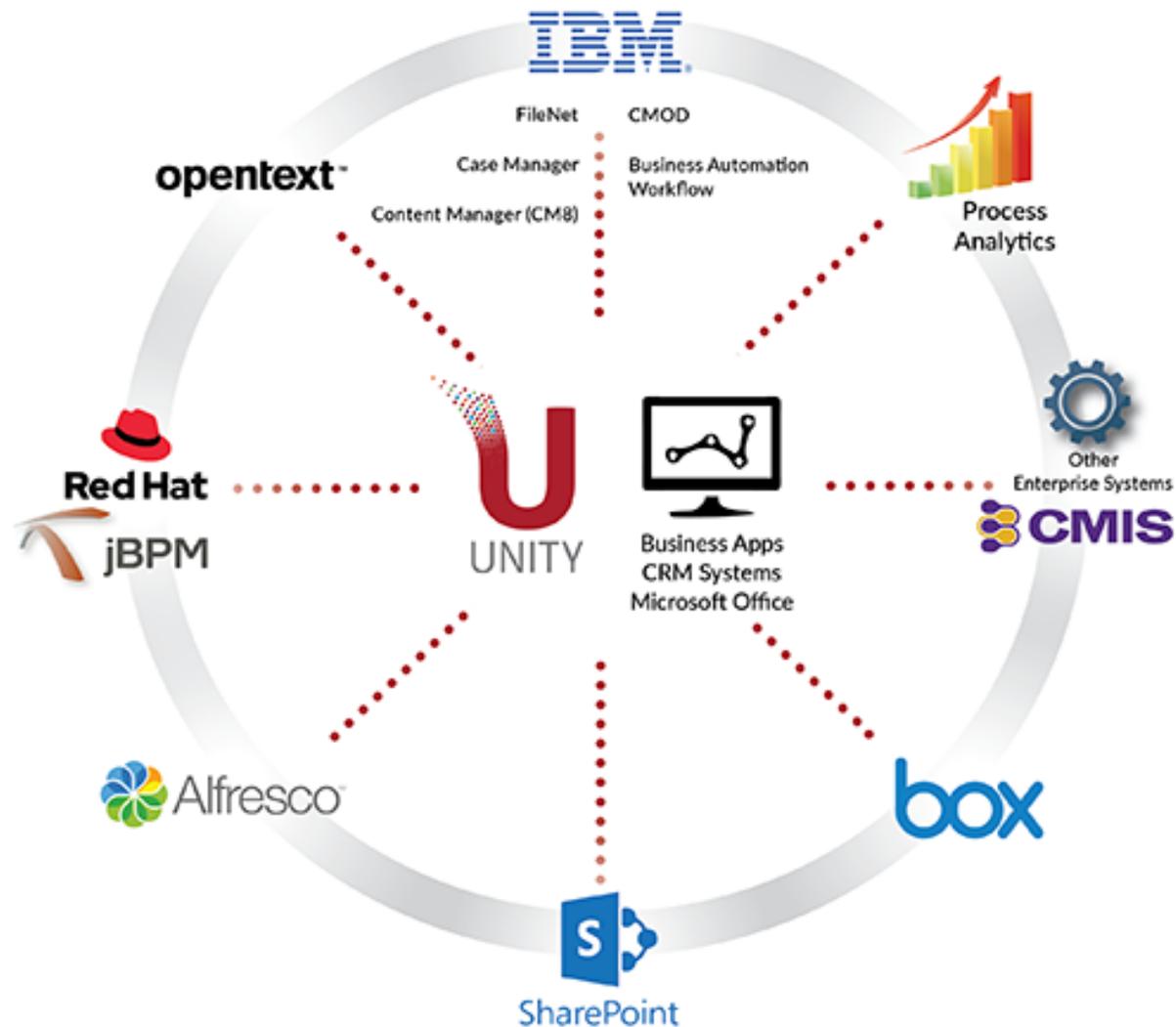


## Government



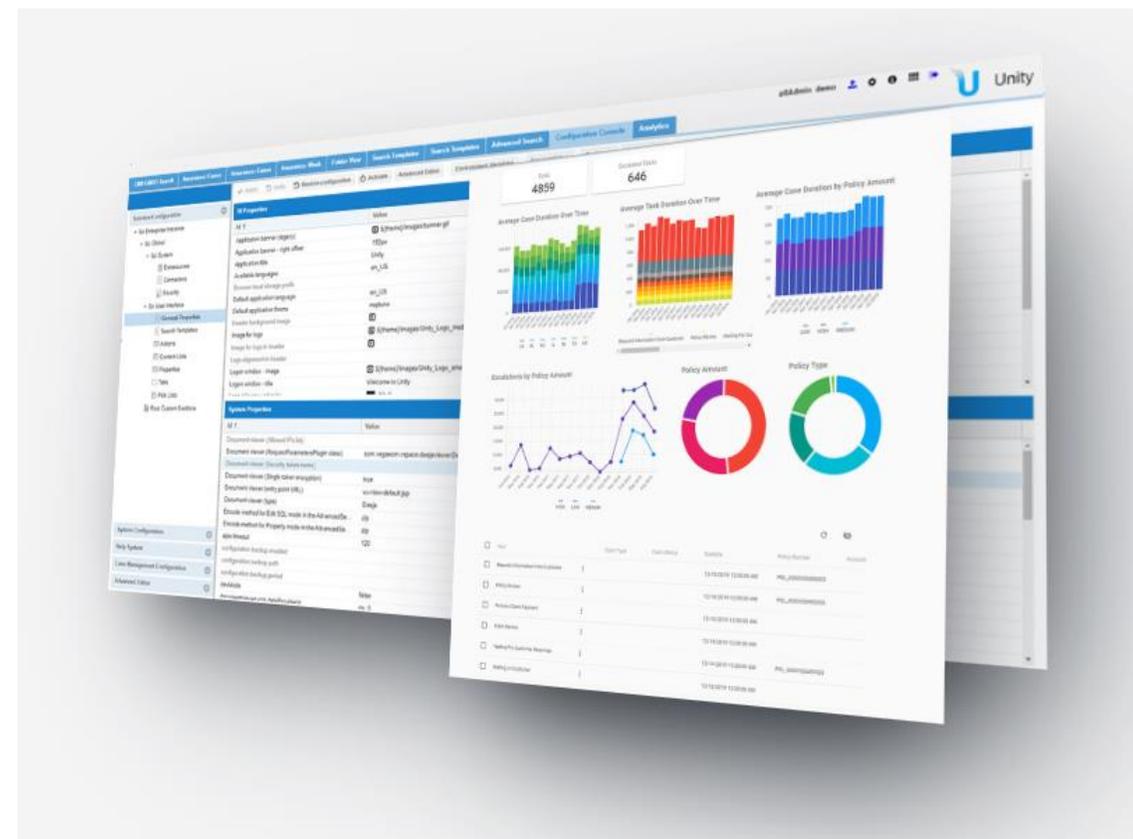
## Banking & Finance





## Unity Solves:

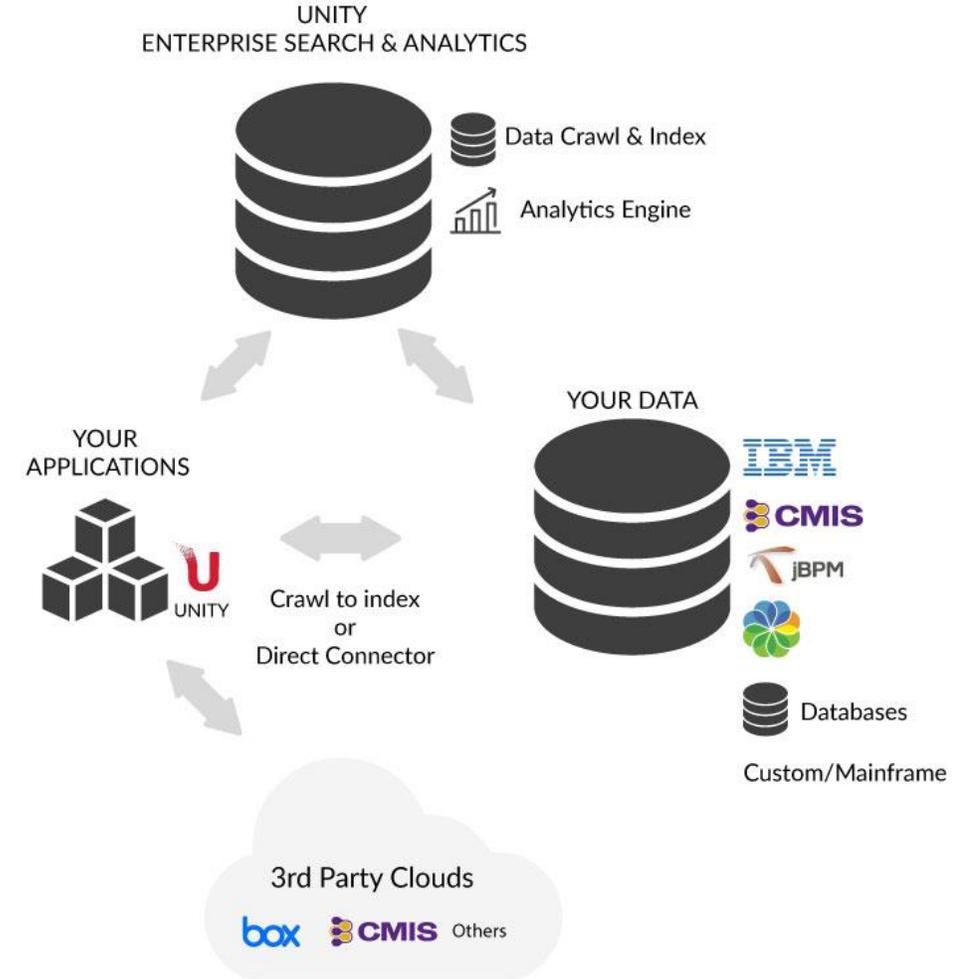
- Connecting multiple ECM/BPM systems to a single business application
- Connecting multiple ECM/BPM systems to a CRM like Salesforce or Dynamics
- Enable migration and digital transformation for content and processes
- Enhancing and increasing value derived from a single content or process source

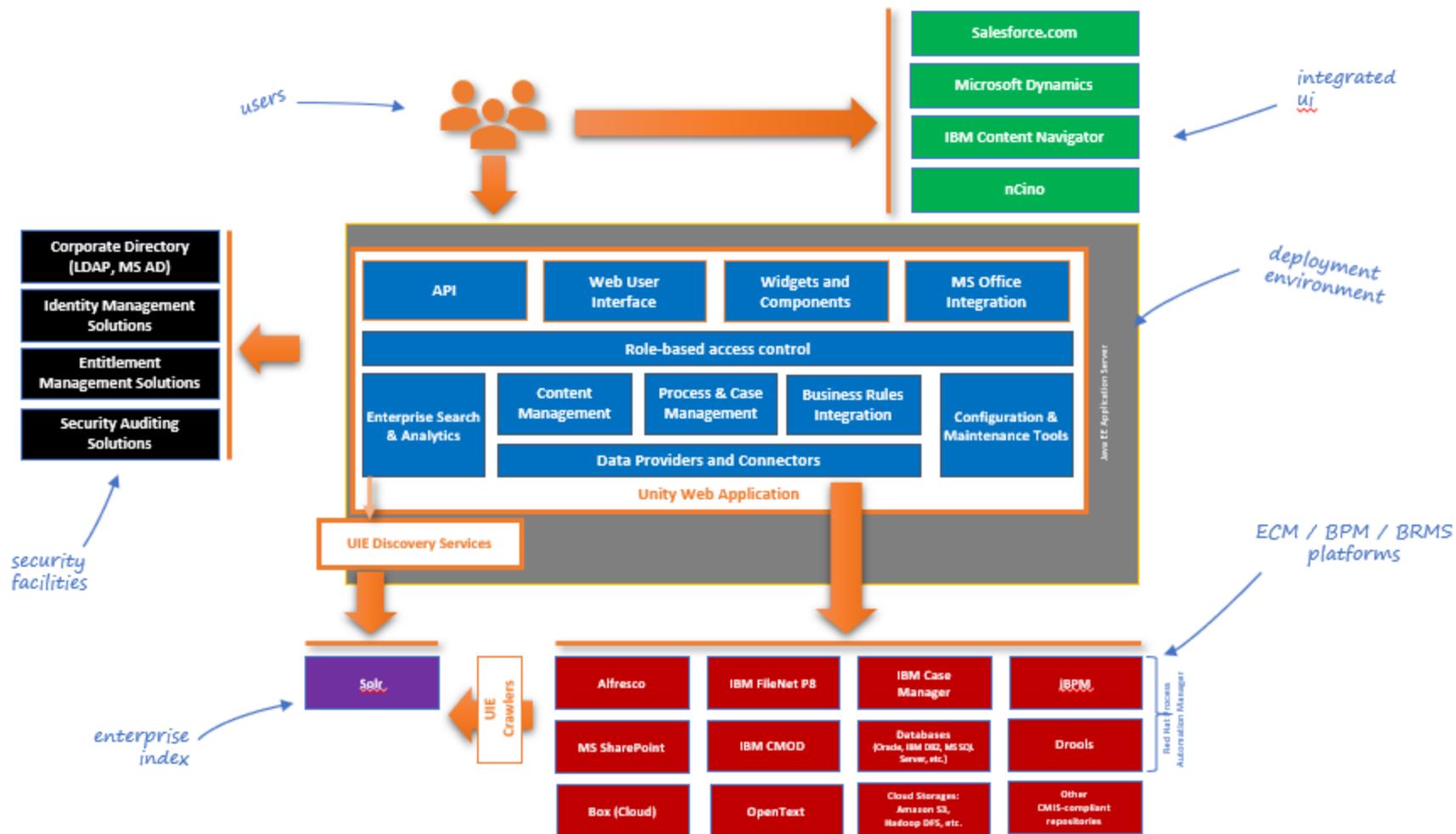


**Enables you to embed your enterprise data & content directly in your business applications or customize Unity's standalone UI.**

## Products & Solutions:

- Unity
- Unity for Dynamics
- Unity for Salesforce
- Unity for nCino
  
- Interchange







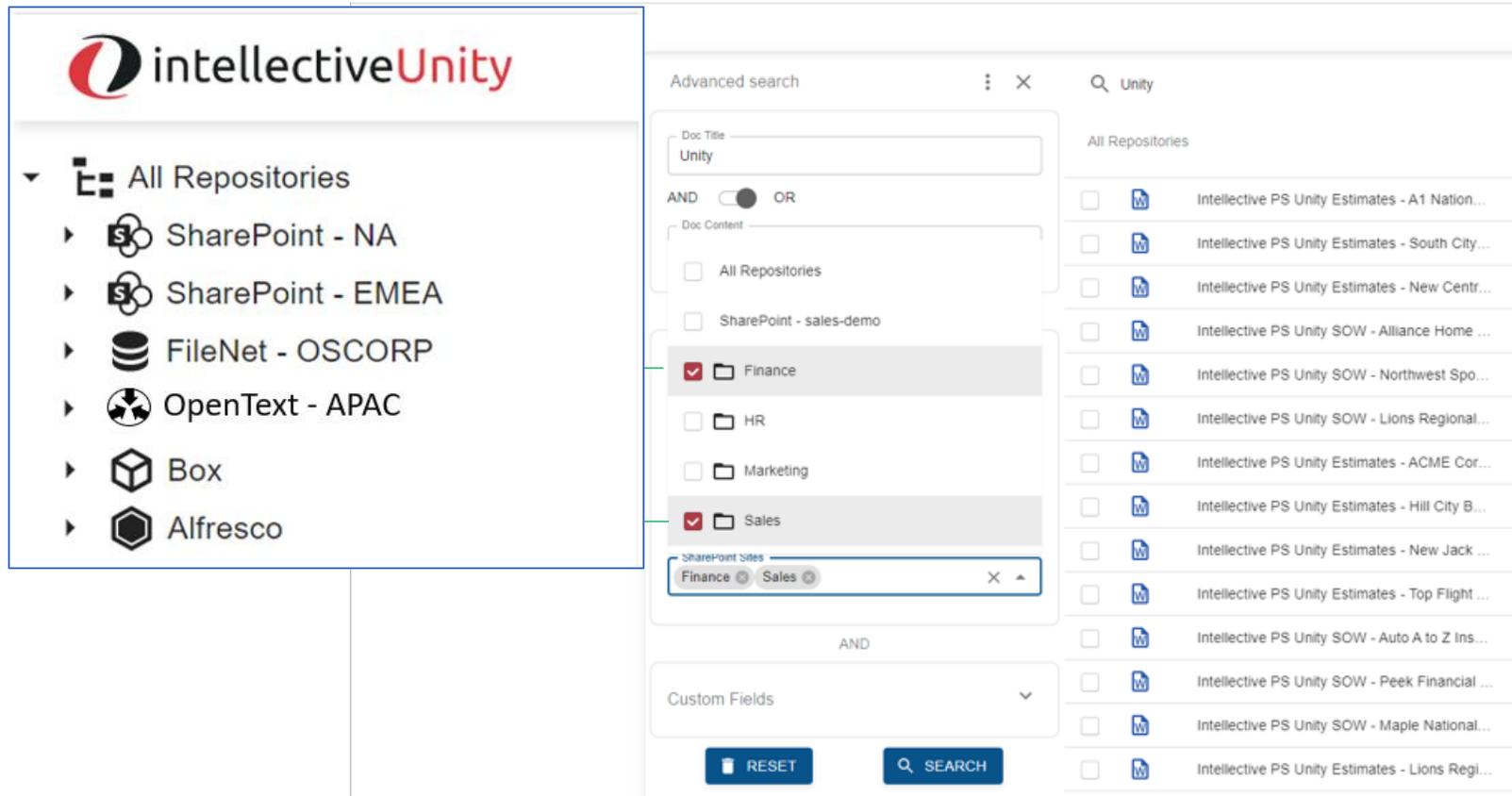
**Unity 8.0**  
**SharePoint Capabilities**



- SharePoint provides the capability to search across the Entire Organization (All SP Sites) or select a Specific SP Site. Which can either provide a too board or too narrow search window.

With Unity 8 a user can:

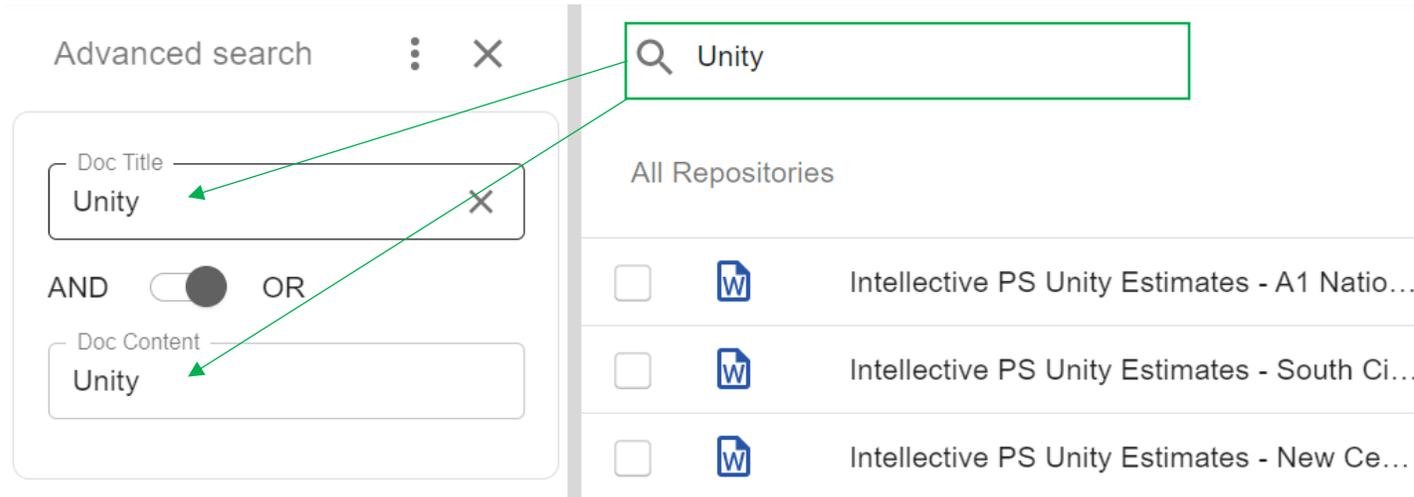
- Select Multiple SharePoint Sites: without having to select All Sites to perform a more refined search



The screenshot displays the Unity 8 search interface. On the left, a sidebar shows the 'intellectiveUnity' logo and a list of repositories under 'All Repositories': SharePoint - NA, SharePoint - EMEA, FileNet - OSCORP, OpenText - APAC, Box, and Alfresco. The main search area is titled 'Advanced search' and includes a search bar with the text 'Unity'. Below the search bar, there are options for 'Doc Title' and 'Doc Content'. The 'Doc Content' section has radio buttons for 'AND' and 'OR', and a list of repository categories: All Repositories, SharePoint - sales-demo, Finance (checked), HR, Marketing, and Sales (checked). Below this, there is a 'SharePoint Sites' section with a dropdown menu showing 'Finance' and 'Sales' selected. At the bottom of the search area, there are 'RESET' and 'SEARCH' buttons. On the right side, a list of search results is displayed under the heading 'All Repositories', showing various document titles such as 'Intellective PS Unity Estimates - A1 Nation...', 'Intellective PS Unity Estimates - South City...', and 'Intellective PS Unity SOW - Alliance Home ...'.

Searching for content in SharePoint can be challenging and time consuming.

- SharePoint provides a Single Search Field which returns content that contains the search criteria in either the Document Title or the Content of the Document. This can often return too many results.
- With Unity 8 a user can:
  - Refine their search to using separate fields for Document Title and Document Content
  - Refine the Operator to use OR (Default behavior to match SharePoint) or AND.



Advanced search

Doc Title  
Unity

AND  OR

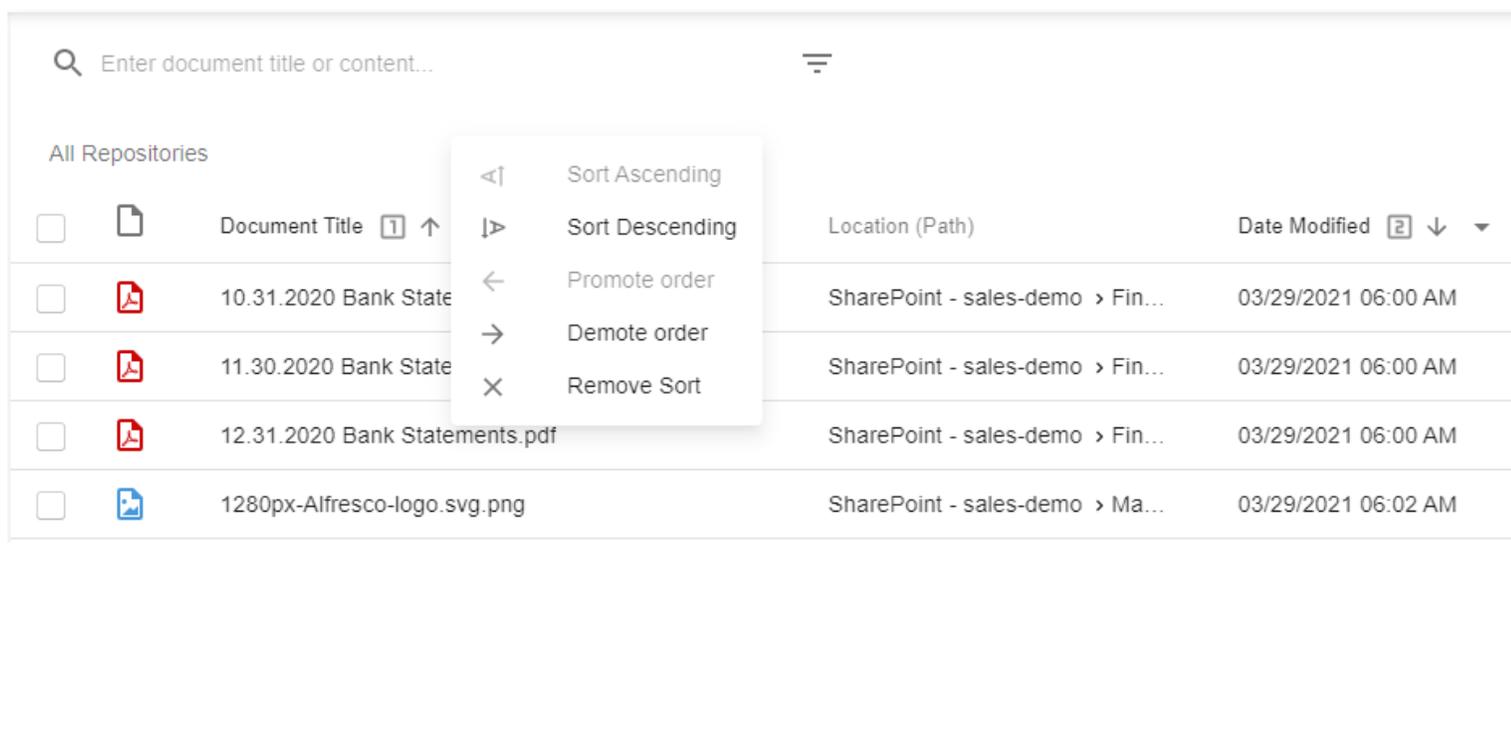
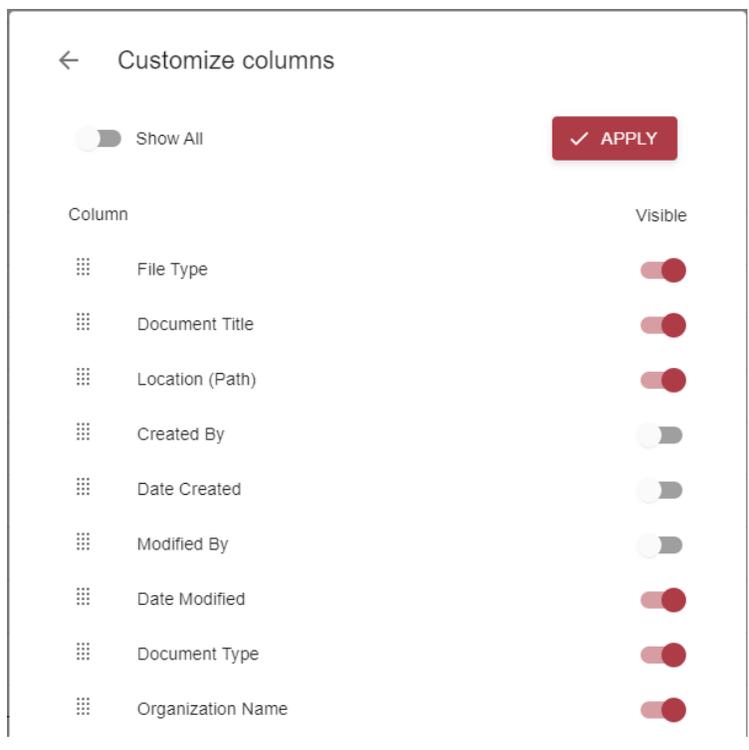
Doc Content  
Unity

Q Unity

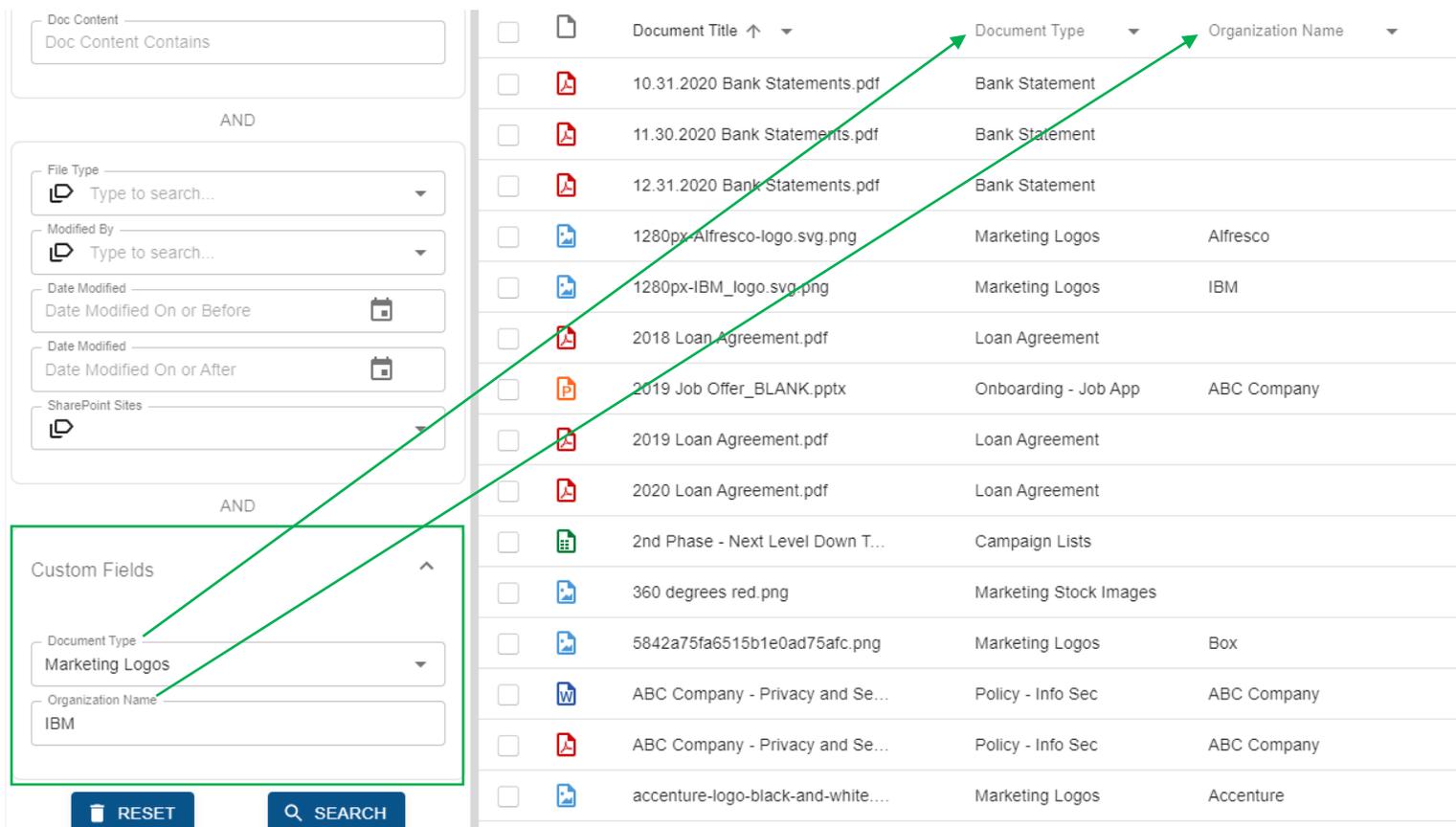
All Repositories

<input type="checkbox"/>		Intellective PS Unity Estimates - A1 Natio...
<input type="checkbox"/>		Intellective PS Unity Estimates - South Ci...
<input type="checkbox"/>		Intellective PS Unity Estimates - New Ce...

- SharePoint has limited capabilities to sort on the search results or control the column headings (display/hide or order). With Unity 8 the end user can:
  - Customize which search result columns to display or hide and control the order.
  - Sort on one more of the search result columns and control the sort order.



- SharePoint does not provide an easy way for end users to search for content using custom metadata.
- With Unity 8:
- Custom metadata fields can be pre-configured for end users to leverage in Search Criteria or Results.



The screenshot displays the Unity 8 search interface. On the left, the search criteria are defined using a series of filters. The 'Doc Content' filter is set to 'Doc Content Contains'. Below this, an 'AND' operator is used. The 'File Type' filter is set to 'Marketing Logos'. The 'Modified By' filter is set to 'IBM'. The 'Date Modified' filter is set to 'Date Modified On or Before'. The 'SharePoint Sites' filter is set to 'IBM'. A 'Custom Fields' section is highlighted with a green box, showing 'Document Type' set to 'Marketing Logos' and 'Organization Name' set to 'IBM'. At the bottom of the search criteria are 'RESET' and 'SEARCH' buttons.

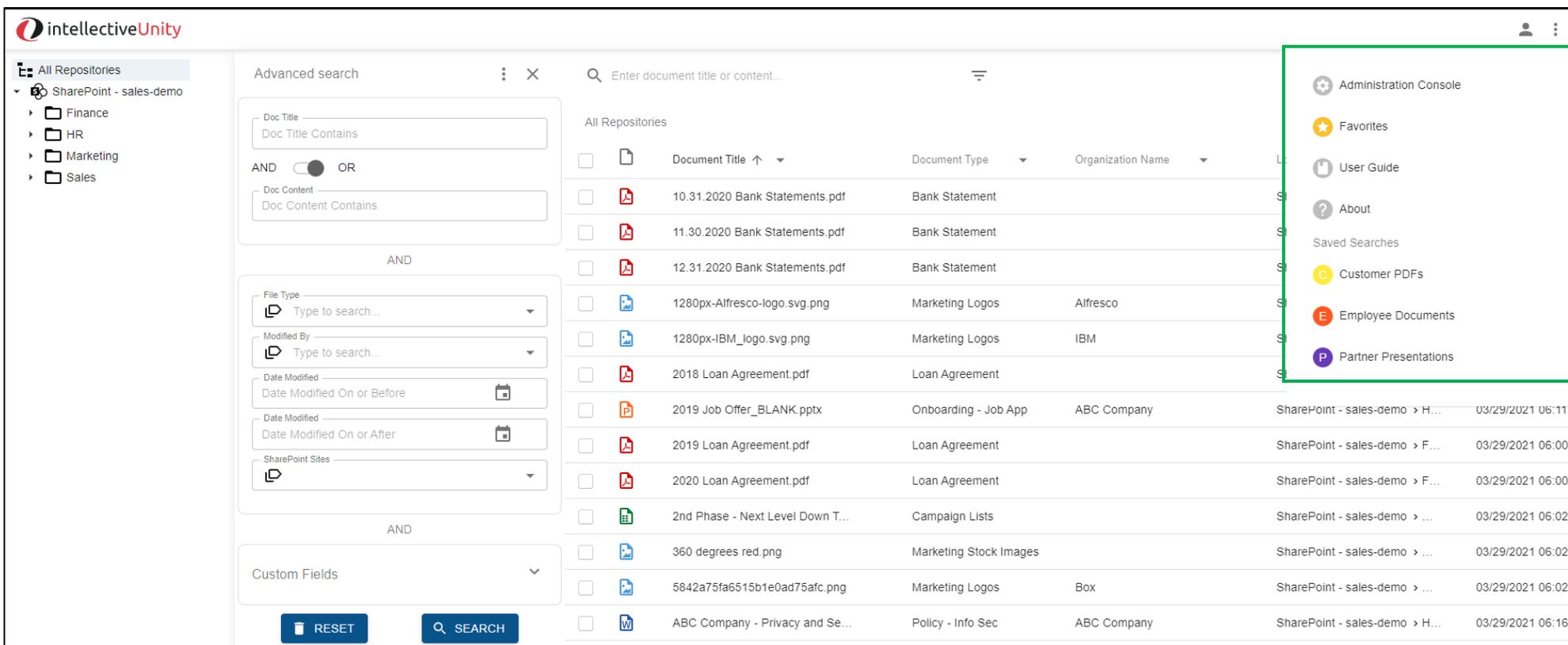
On the right, the search results are displayed in a table format. The table has columns for 'Document Title', 'Document Type', and 'Organization Name'. The results are as follows:

Document Title	Document Type	Organization Name
10.31.2020 Bank Statements.pdf	Bank Statement	
11.30.2020 Bank Statements.pdf	Bank Statement	
12.31.2020 Bank Statements.pdf	Bank Statement	
1280px-Alfresco-logo.svg.png	Marketing Logos	Alfresco
1280px-IBM_logo.svg.png	Marketing Logos	IBM
2018 Loan Agreement.pdf	Loan Agreement	
2019 Job Offer_BLANK.pptx	Onboarding - Job App	ABC Company
2019 Loan Agreement.pdf	Loan Agreement	
2020 Loan Agreement.pdf	Loan Agreement	
2nd Phase - Next Level Down T...	Campaign Lists	
360 degrees red.png	Marketing Stock Images	
5842a75fa6515b1e0ad75afc.png	Marketing Logos	Box
ABC Company - Privacy and Se...	Policy - Info Sec	ABC Company
ABC Company - Privacy and Se...	Policy - Info Sec	ABC Company
accenture-logo-black-and-white....	Marketing Logos	Accenture

- SharePoint has limited capabilities to Save Content as Favorite or Save Search Criteria.

With Unity 8 end users can:

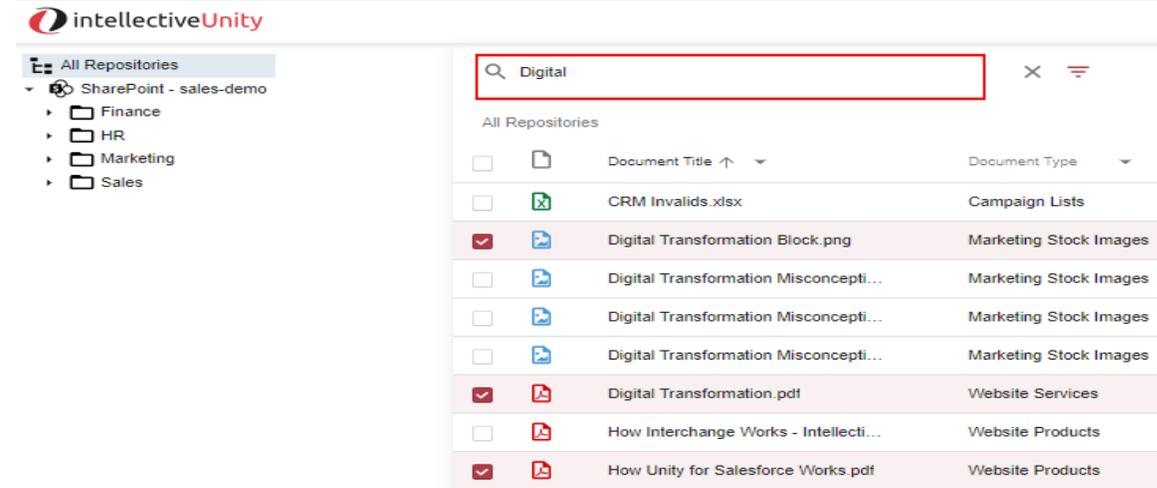
- Indicate a Document as a Favorite and view a list of Favorites. Favorites display by default on Log In.
- Save Search Criteria as a Saved Search, and access Saved Searches to quick execute the search without re-entering the search criteria.



The screenshot displays the Intellective Unity 8 interface. On the left, there is a sidebar with 'All Repositories' and a tree view for 'SharePoint - sales-demo' containing folders for Finance, HR, Marketing, and Sales. The main area features an 'Advanced search' panel with fields for 'Doc Title' and 'Doc Content', both containing 'Doc Title Contains' and 'Doc Content Contains' respectively. Below these are filters for 'File Type', 'Modified By', 'Date Modified', and 'SharePoint Sites'. A 'Custom Fields' dropdown is also visible. At the bottom of the search panel are 'RESET' and 'SEARCH' buttons. The central part of the interface shows a table of 'All Repositories' with columns for 'Document Title', 'Document Type', and 'Organization Name'. The table lists various documents such as '10.31.2020 Bank Statements.pdf', '11.30.2020 Bank Statements.pdf', '12.31.2020 Bank Statements.pdf', '1280px-Alfresco-logo.svg.png', '1280px-IBM\_logo.svg.png', '2018 Loan Agreement.pdf', '2019 Job Offer\_BLANK.pptx', '2019 Loan Agreement.pdf', '2020 Loan Agreement.pdf', '2nd Phase - Next Level Down T...', '360 degrees red.png', '5842a75fa6515b1e0ad75afc.png', and 'ABC Company - Privacy and Se...'. On the right side, a navigation menu is highlighted with a green border, listing options: Administration Console, Favorites, User Guide, About, Saved Searches, Customer PDFs, Employee Documents, and Partner Presentations.

- SharePoint does not provide a capability to select content across multiple searches and provide a consolidate list.

## Search #1



intellectiveUnity

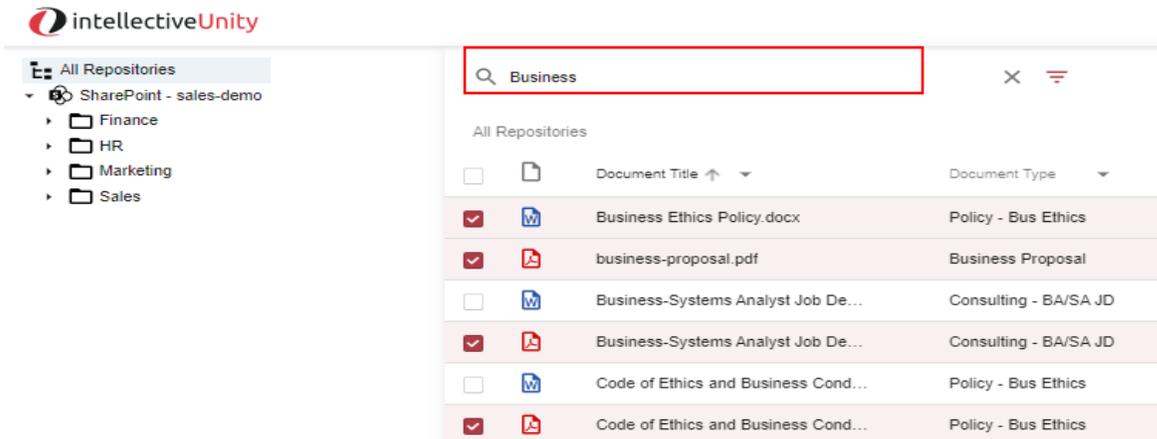
All Repositories

- SharePoint - sales-demo
  - Finance
  - HR
  - Marketing
  - Sales

Search: Digital

Document Title	Document Type
CRM Invalids.xlsx	Campaign Lists
<input checked="" type="checkbox"/> Digital Transformation Block.png	Marketing Stock Images
<input type="checkbox"/> Digital Transformation Misconcepti...	Marketing Stock Images
<input type="checkbox"/> Digital Transformation Misconcepti...	Marketing Stock Images
<input type="checkbox"/> Digital Transformation Misconcepti...	Marketing Stock Images
<input checked="" type="checkbox"/> Digital Transformation.pdf	Website Services
<input type="checkbox"/> How Interchange Works - Intellecti...	Website Products
<input checked="" type="checkbox"/> How Unity for Salesforce Works.pdf	Website Products

## Search #2



intellectiveUnity

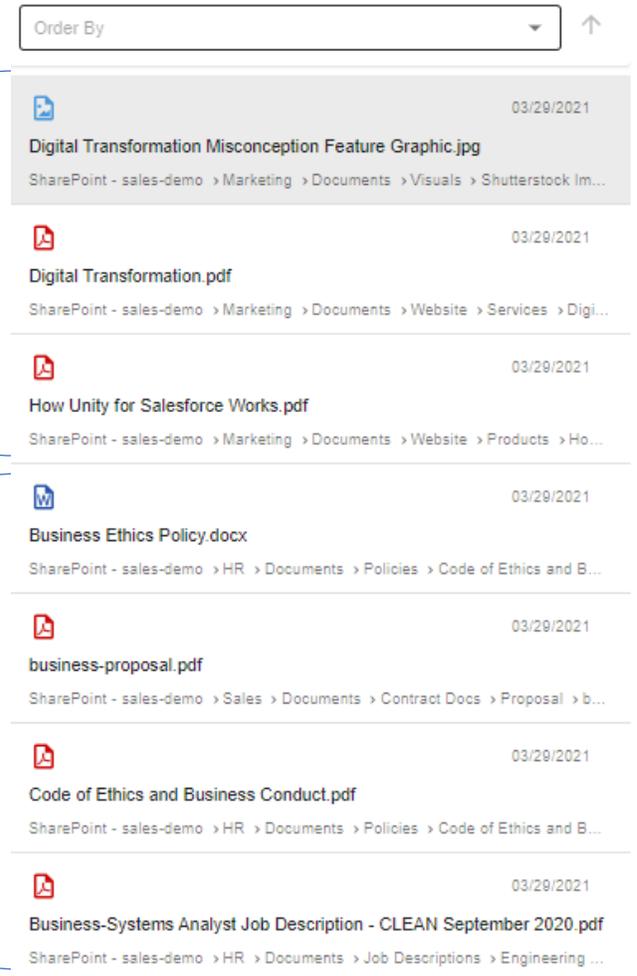
All Repositories

- SharePoint - sales-demo
  - Finance
  - HR
  - Marketing
  - Sales

Search: Business

Document Title	Document Type
<input checked="" type="checkbox"/> Business Ethics Policy.docx	Policy - Bus Ethics
<input checked="" type="checkbox"/> business-proposal.pdf	Business Proposal
<input type="checkbox"/> Business-Systems Analyst Job De...	Consulting - BA/SA JD
<input checked="" type="checkbox"/> Business-Systems Analyst Job De...	Consulting - BA/SA JD
<input type="checkbox"/> Code of Ethics and Business Cond...	Policy - Bus Ethics
<input checked="" type="checkbox"/> Code of Ethics and Business Cond...	Policy - Bus Ethics

## Consolidate Search Results

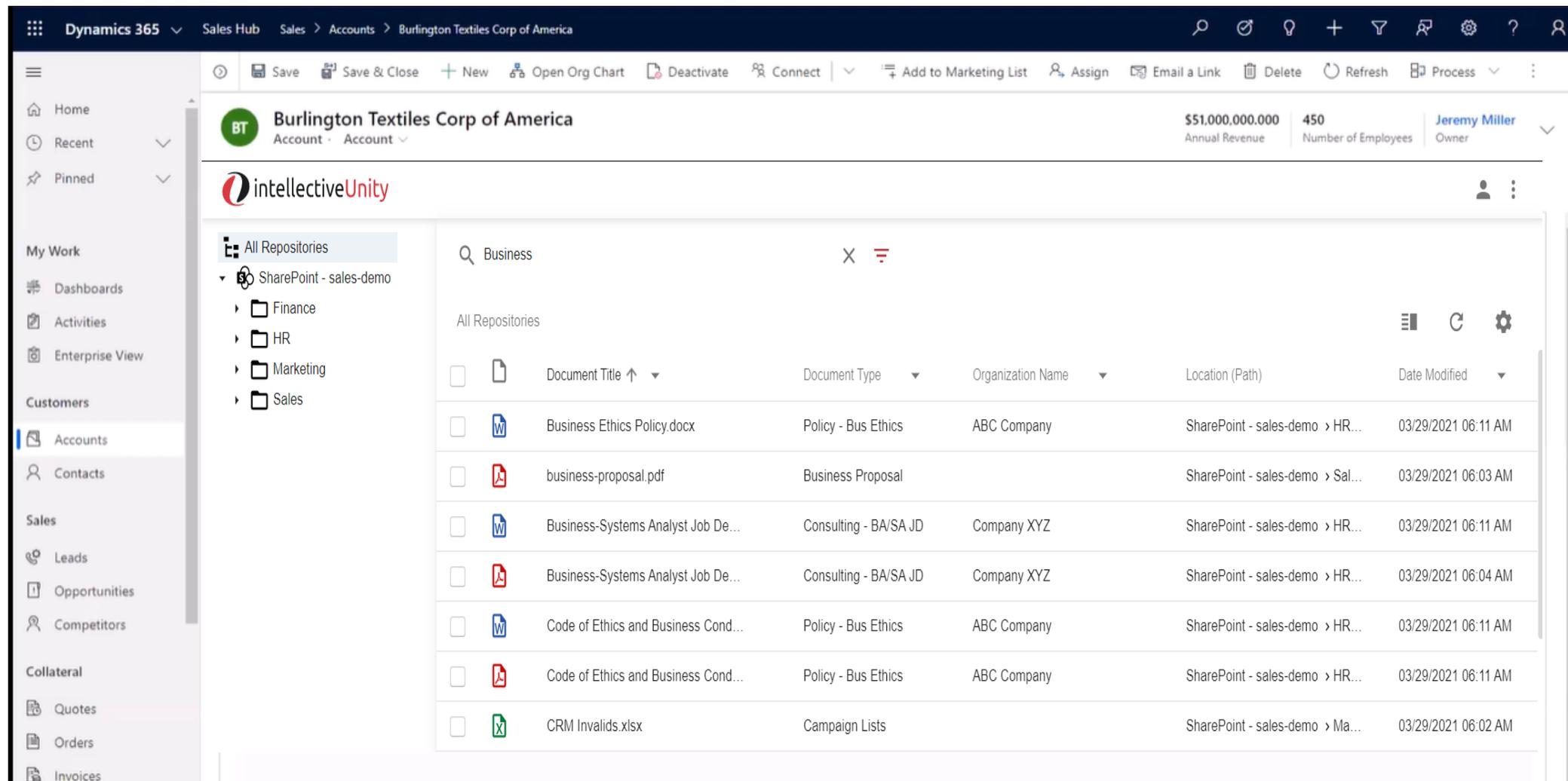


Order By

- Digital Transformation Misconception Feature Graphic.jpg  
SharePoint - sales-demo > Marketing > Documents > Visuals > Shutterstock Im...
- Digital Transformation.pdf  
SharePoint - sales-demo > Marketing > Documents > Website > Services > Digi...
- How Unity for Salesforce Works.pdf  
SharePoint - sales-demo > Marketing > Documents > Website > Products > Ho...
- Business Ethics Policy.docx  
SharePoint - sales-demo > HR > Documents > Policies > Code of Ethics and B...
- business-proposal.pdf  
SharePoint - sales-demo > Sales > Documents > Contract Docs > Proposal > b...
- Code of Ethics and Business Conduct.pdf  
SharePoint - sales-demo > HR > Documents > Policies > Code of Ethics and B...
- Business-Systems Analyst Job Description - CLEAN September 2020.pdf  
SharePoint - sales-demo > HR > Documents > Job Descriptions > Engineering ...

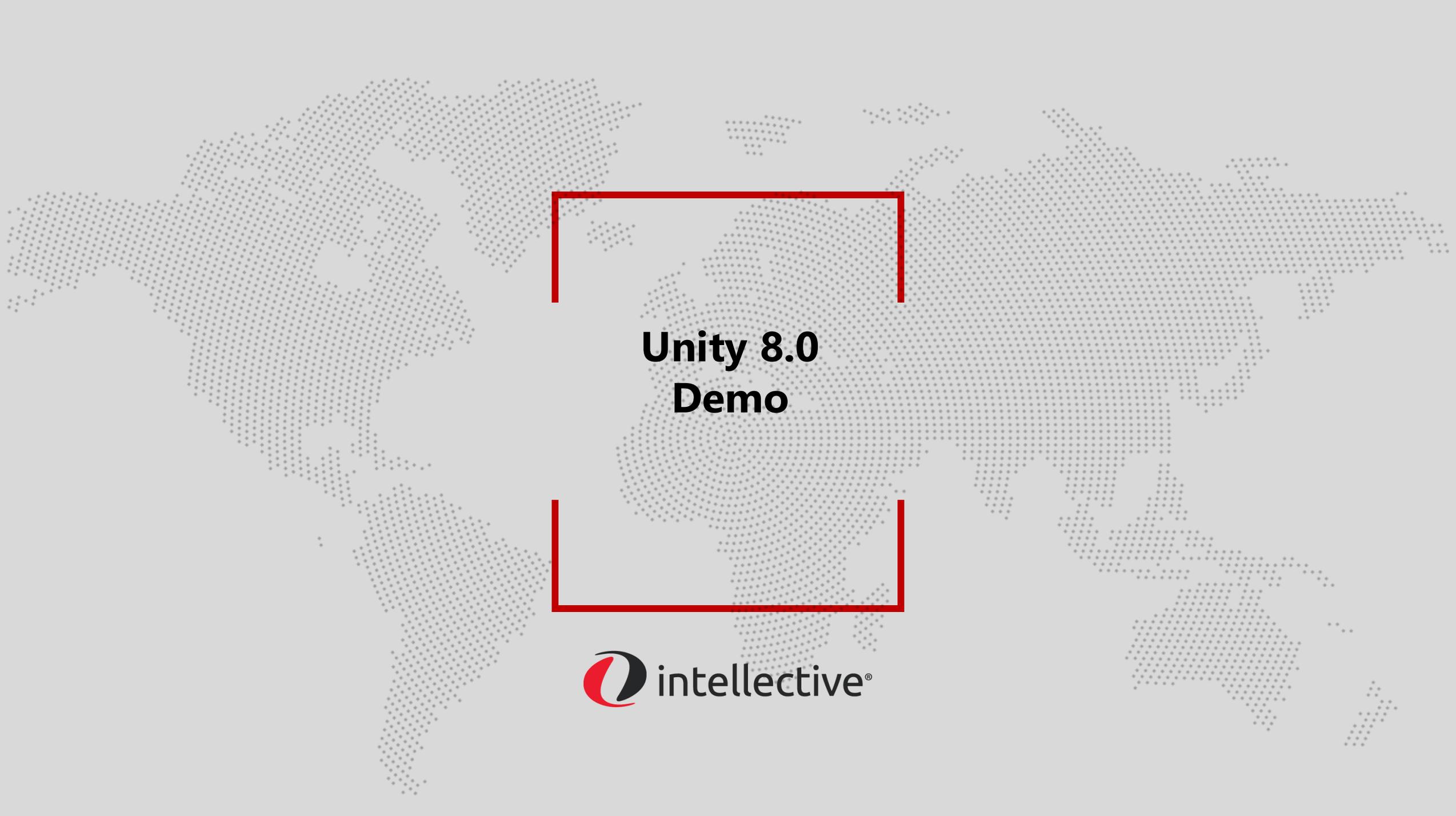
- Unity 8 embedded into high use applications (e.g., CRM, ERP, LOB).

Example below presents Unity 8 embedded into MS Dynamics



The screenshot displays the Microsoft Dynamics 365 interface. The top navigation bar shows 'Dynamics 365' and 'Sales Hub'. The main content area is titled 'Burlington Textiles Corp of America' with account details: Annual Revenue of \$51,000,000.000, 450 Number of Employees, and Owner Jeremy Miller. The Unity 8 interface is embedded within the 'SharePoint - sales-demo' repository, showing a search for 'Business' and a list of documents.

Document Title	Document Type	Organization Name	Location (Path)	Date Modified
Business Ethics Policy.docx	Policy - Bus Ethics	ABC Company	SharePoint - sales-demo > HR...	03/29/2021 06:11 AM
business-proposal.pdf	Business Proposal		SharePoint - sales-demo > Sal...	03/29/2021 06:03 AM
Business-Systems Analyst Job De...	Consulting - BA/SA JD	Company XYZ	SharePoint - sales-demo > HR...	03/29/2021 06:11 AM
Business-Systems Analyst Job De...	Consulting - BA/SA JD	Company XYZ	SharePoint - sales-demo > HR...	03/29/2021 06:04 AM
Code of Ethics and Business Cond...	Policy - Bus Ethics	ABC Company	SharePoint - sales-demo > HR...	03/29/2021 06:11 AM
Code of Ethics and Business Cond...	Policy - Bus Ethics	ABC Company	SharePoint - sales-demo > HR...	03/29/2021 06:11 AM
CRM Invalids.xlsx	Campaign Lists		SharePoint - sales-demo > Ma...	03/29/2021 06:02 AM



**Unity 8.0  
Demo**





**Unity 8.0  
SharePoint  
Deployment Options**



## INTELLECTIVE UNITY ACCESS REQUEST FORM

### 2. Select SharePoint Deployment Type

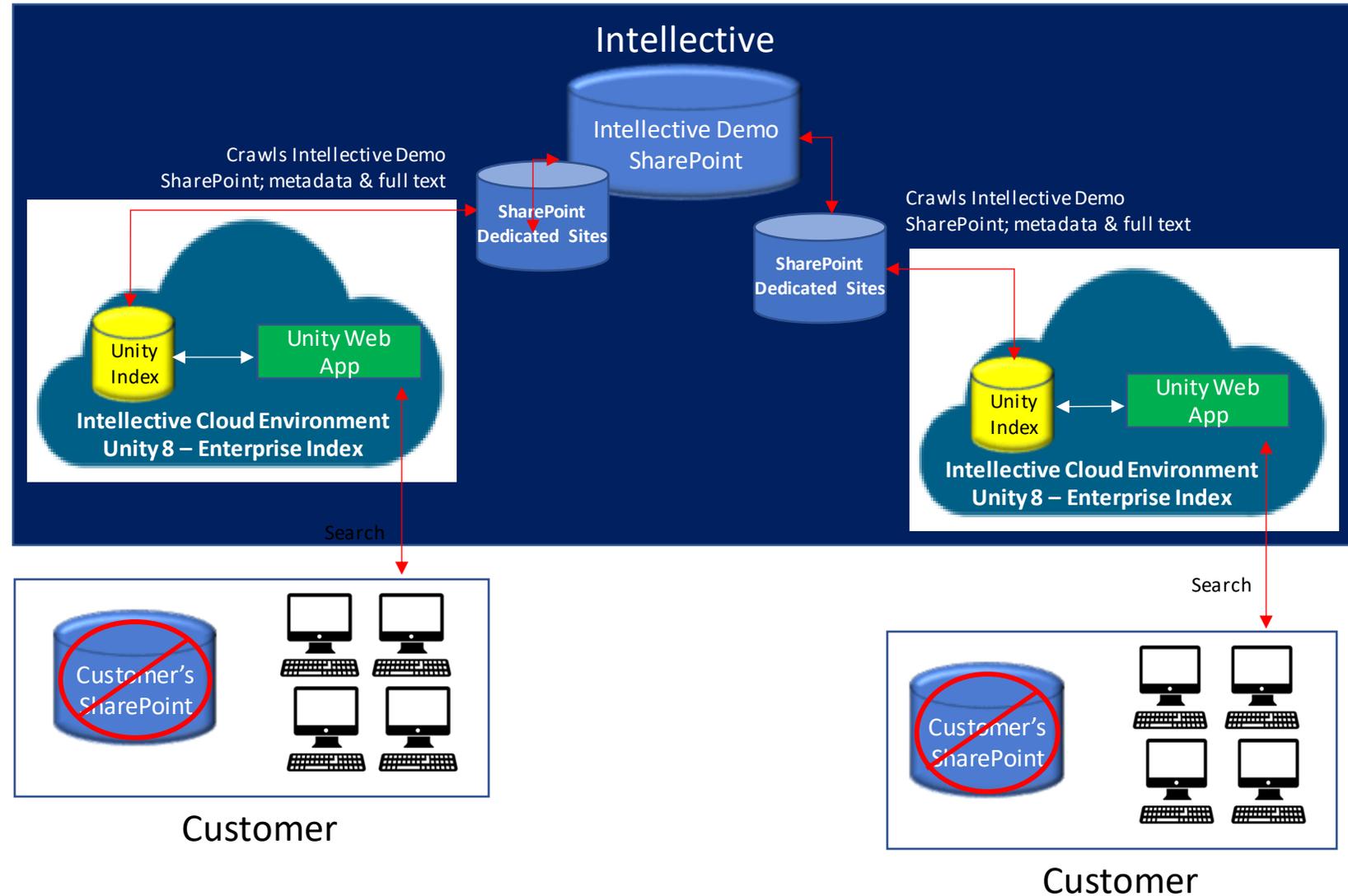
Intellective will deploy a personalized instance of Unity in our environment. Start using Unity immediately in our secure cloud to connect to content, process, data, and applications.

- Pre-Configured SharePoint Demo (Intellective Cloud)
- SharePoint Online (Intellective Cloud)
- SharePoint Online (Customer Environment Cloud or On-Premise)
- SharePoint On-Premise (Customer Environment Cloud or On-Premise)
- Contact Intellective for Other Deployment Options

## Pre-Configured Demo SharePoint Sites and Content in Intellective's Cloud Environment.

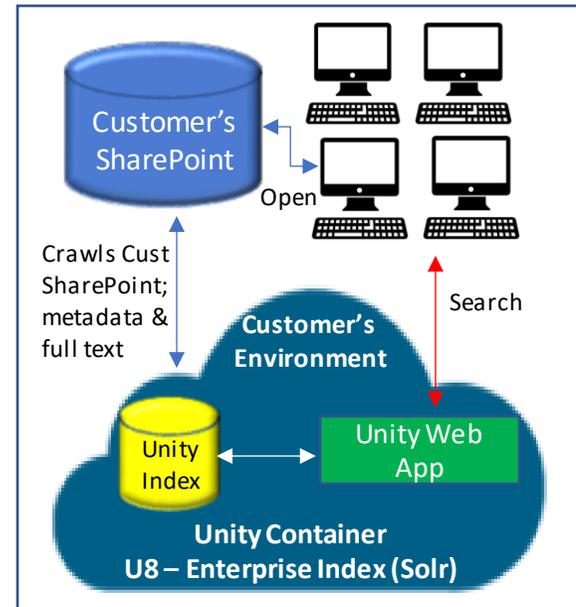
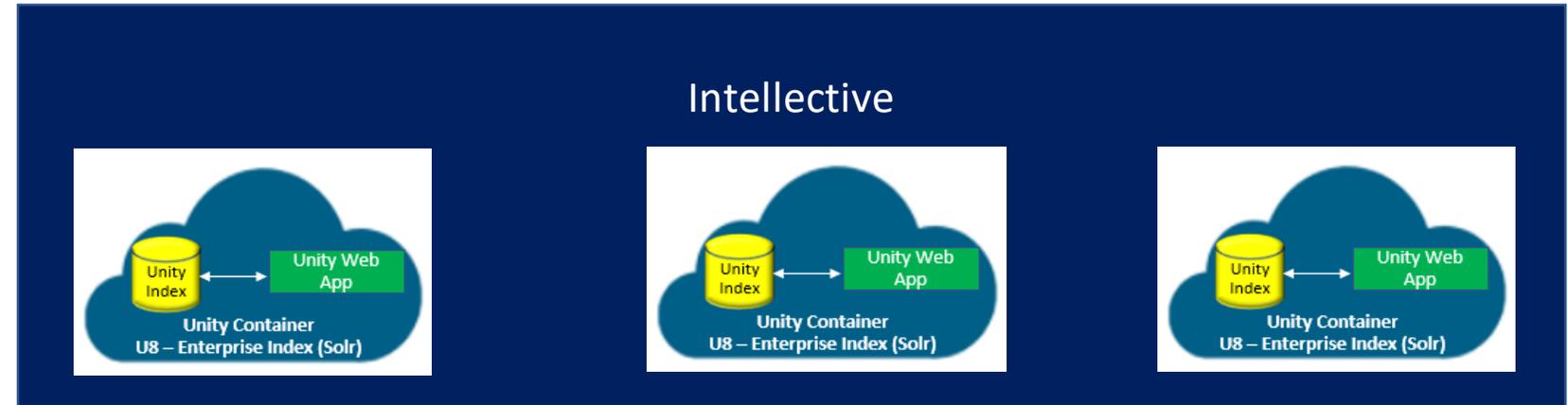
### Environment.

- Leverages Intellective's Demo SharePoint Environment.

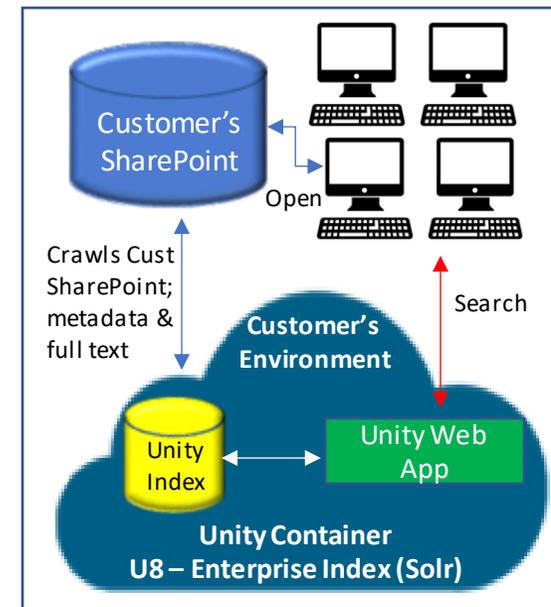


**Unity 8 Container Implemented in Customer's Environment.**

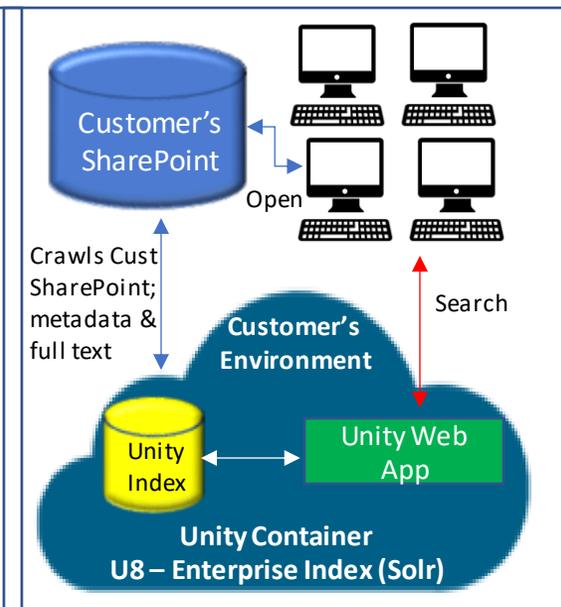
- Leverages Customer's own SharePoint Environment.



Customer



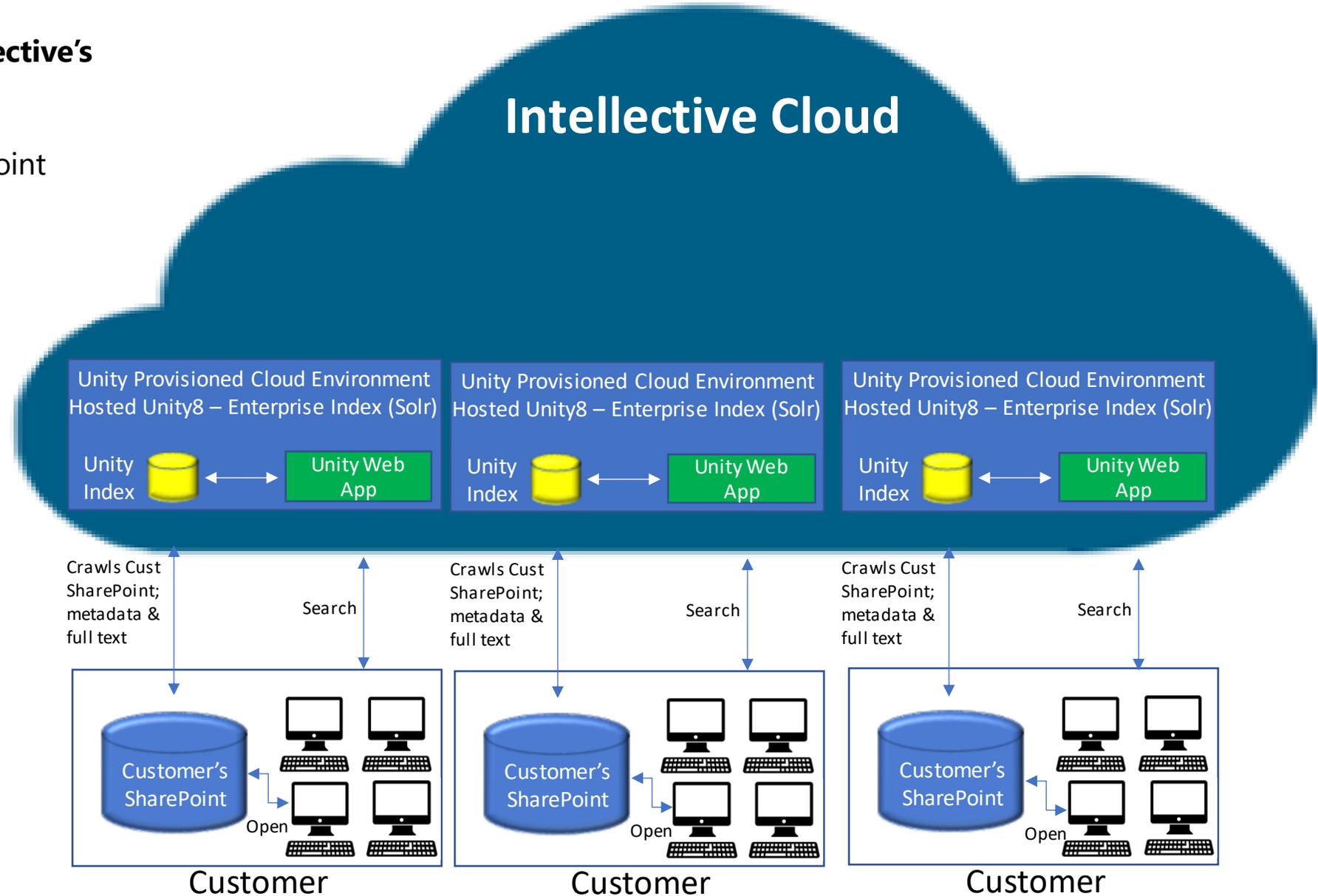
Customer



Customer

## SharePoint Online, Hosted in Intellective's Cloud Environment.

- Leverages Customer's own SharePoint Environment.





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