

 Solution

Director® Unity Client

Simplify Document Management With a Customizable User Interface

Easily upload, organize and retrieve documents with Director Unity Client from Fiserv, the next-generation user interface for Director that provides a familiar, easy-to-use look and feel. Intuitive navigation and customizable features improve your staff productivity with minimal training.

When you implement Director Unity Client, your staff can get up to speed on Director more quickly, personalize their view of Director easily, and perform their role-specific Director functions and tasks more efficiently.

Customizable Interface

Director Unity Client offers employees a customizable interface with features that include a personalized favorites menu, where your team members can manage most-used functions by tailoring the homepage and personal pages. From the homepage, each user can directly launch common Director operations – such as document retrieval and customer queries – and add panes for website links and RSS feeds.

Personal pages enable staff members to configure a personalized, searchable, tile-based user interface while providing convenient access to documents, workflows, folders, forms and more.



Intuitive Organization

The Director Unity Client layout makes it easy for your employees to locate the functions they need to complete a task.

→ **Ribbons** – Familiar contextual ribbons like those used in popular business applications show the available user actions based on the layout being displayed. Each ribbon is divided into groups that sort buttons together by function for fast, efficient operations

→ **Task Panes** – These panes display dynamically based on the action taken and the window displays as long as needed or until a function is complete. It's ideal for displaying information that needs to be referenced only briefly, or for tasks such as adding documents to an envelope, displaying a document's keywords or managing Favorites and query history

→ **Hit List Grouping, Sorting and Filtering** – Your staff can search document lists using customized grouping, sorting and filtering features. Customized searches are saved automatically, but default settings are easily restored

Import Preview

Preview and upload any document, including spreadsheets, emails or email attachments, by dragging and dropping it onto the upload or preview panes. The document displays in a preview pane for review, enabling you to verify account number, name, tax ID and more, before saving the information.

The screenshot displays the Director Unity Client interface. At the top, there is a ribbon-style toolbar with various icons for navigation and actions, including Home, Personal Page, Favorites, Custom Queries, Retrieval, File Cabinets, Envelopes, Document Handle, Query History, Trash Can, Forms, Import, Templates, Reporting, Mailbox, Workflow, My Reading Groups, Batch Scanning, Batch Processing, Document Tracking, and Combined Viewer. Below the toolbar, the main window is titled "Document Retrieval" and shows search results for 13 documents. The search criteria include "DEPOSIT DOCUMENTS" and "Keywords and Date Range". The search results are displayed in a table with columns for Icon, Name, Type, and Date.

Icon	Name	Type	Date
\$	[4] DEP Account Maintenance Form - 8/15/2012 - 25 - 200050 - GEORGE WASHINGTON	DEP Account Maintenance Form	8/15/2012
\$	[1] DEP ACH/Direct Deposit Authorization - 11/30/2021 - 25 - 200050 - GEORGE WASHINGTON	DEP ACH/Direct Deposit Authorization	11/30/2021
\$	[2] DEP ACH/Direct Deposit Authorization - 8/4/2021 - 25 - 200050 - MARTHA WASHINGTON	DEP ACH/Direct Deposit Authorization	8/4/2021
\$	[1] DEP Card Applications - 7/11/2012 - 25 - 200050 - GEORGE WASHINGTON	DEP Card Applications	7/11/2012
\$	[1] DEP Declined Card Applications - 7/10/2012 - 25 - 200050 - GEORGE WASHINGTON	DEP Declined Card Applications	7/10/2012
\$	DEP Misc - 12/9/2011 - 25 - 200050 - GEORGE WASHINGTON	DEP Misc	12/9/2011
\$	DEP RegE Opt-In/Opt-Out Form - 10/9/2015 - 25 - 200050 - GEORGE WASHINGTON	DEP RegE Opt-In/Opt-Out Form	10/9/2015
\$	DEP RegE Opt-In/Opt-Out Form - 12/5/2011 - 25 - 200050 - GEORGE WASHINGTON	DEP RegE Opt-In/Opt-Out Form	12/5/2011
\$	[1] DEP Signature - 4/5/2012 - 25 - 200050 - GEORGE WASHINGTON	DEP Signature	4/5/2012
\$	[1] DEP Signature - 4/5/2012 - 25 - 200050 - MARTHA WASHINGTON	DEP Signature	4/5/2012
\$	[1] DEP Signature Card - 6/8/2021 - 25 - 200050 - GEORGE WASHINGTON	DEP Signature Card	6/8/2021
\$	[1] DEP Signature Card - 6/8/2021 - 25 - 200050 - GEORGE WASHINGTON	DEP Signature Card	6/8/2021
\$	[1] DEP Transfer Agreement - 12/19/2011 - 25 - 200050 - GEORGE WASHINGTON	DEP Transfer Agreement	12/19/2011

Using intuitive, ribbon-style toolbars, staff can easily access the forms, functions and workflows they use most often.

Integrated Workflow Experience

Director Unity Client extends the value of your organization's integrated experience with Director, especially with the Director Workflow module. The user-friendly layout displays all tasks and actions on a single screen for improved efficiency. The integrated workflow experience provides your staff with access to related documents, task buttons and user interaction right from selected or open documents.

Director Unity Client unlocks access to more advanced Director features and modules that aren't available in the other Director user interfaces, including Director Document Packets, Director Document Tracking, Director DocuSign® eSignature Interface, Director Reporting Dashboards and Director eForms.




Key Benefits:

- Simplifies Director access through an intuitive layout that presents features and functions where users expect to find them
- Leverages user familiarity with popular business software to minimize training and support costs
- Increases staff efficiency in performing role-specific Director functions and tasks
- Improves productivity with a customizable user interface that makes it easy to manage most-used functions



Connect With Us

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