



# Getting Started with UnityDrive

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# Welcome to UnityDrive

A new desktop companion application to Unity

- UnityDrive for your desktop is a quick and easy way for you and your law office to access your Unity files
- With UnityDrive your files in Unity are synced directly from the cloud to your computer, providing you with local access to everything saved in Unity. Because UnityDrive files are synced to the cloud, any changes you make or files you add are automatically updated everywhere, you'll always have the latest version
- UnityDrive files are also available for offline access, making sure your Unity files are available even when your internet provider is not. Cached files sync back to the cloud when you're online, so the latest version is available on your matters
- By default, UnityDrive uses C:\UnityDrive as a storage location for all Unity documents. If another location is selected please make sure it is not in use by other cloud storage services like OneDrive, DropBox or Google Drive

# What is UnityDrive ?

## Cloud Based Storage

- UnityDrive is new companion product to Unity that allows you to easily manage all your matters and documents
- Using UnityDrive you can:
  - Access documents produced in Unity directly from your computer desktop without having to log into Unity
  - Save files and documents directly from your desktop programs and have those files stored in your matter documents tab for a specific matters
  - UnityDrive acts like any other folder on your computer desktop
  - Files loaded into desktop folders are automatically synced to your Unity account

# What are the benefits of UnityDrive?

Powerful new tool for productivity

- Unity Provides a fast and complete document management solution for law offices
- UnityDrive will reduce the time managing files from email and other desktop programs
- Unity creates a folder automatically on your UnityDrive desktop folder for each new matter created in Unity
- No more save to the desktop then uploading to Unity, now its done automatically for you
- Have a local (offline) copy of all your matter documents in case of an internet outage
- Edit documents directly from UnityDrive so Unity does not time out while editing
- Together with custom matters, you can manage all your matters and document in one cloud based solution and access them anywhere
- UnityDrive saves you money by replacing the need for other cloud based solutions such as Dropbox and Google drive.

# Is UnityDrive Secure?

## UnityDrive security

- Yes absolutely!
- Any content loaded into Unity through UnityDrive is encrypted and scanned for viruses
- Your UnityDrive files are still protected by Two Factor Authentication and uses the same account, user id, and password that you use with Unity
- Additionally, you can still control who access your UnityDrive folders using access groups

# Known Limitations

## Known limitations currently with UnityDrive

- There are known limitations with the application to be noted for users:
  - Creating sub folders in a matter folder will prevent content in the matter subfolder from syncing
  - Create a main folder under matter folder will not create a new folder in Unity. We recommend creating new matter in Unity before using a folder in UnityDrive. You can create it before but nothing will sync unless the matter is created in Unity with the same matter number
  - You can only use UnityDrive with one Unity account
  - Access is granted at a firm level not at a user level
  - Don't specify the UnityDrive location using other file sharing apps (Filestream, OneDrive etc.)
  - UnityDrive location should only be on local computer locally (not on network folder)
  - Individual File size limit is 25mb

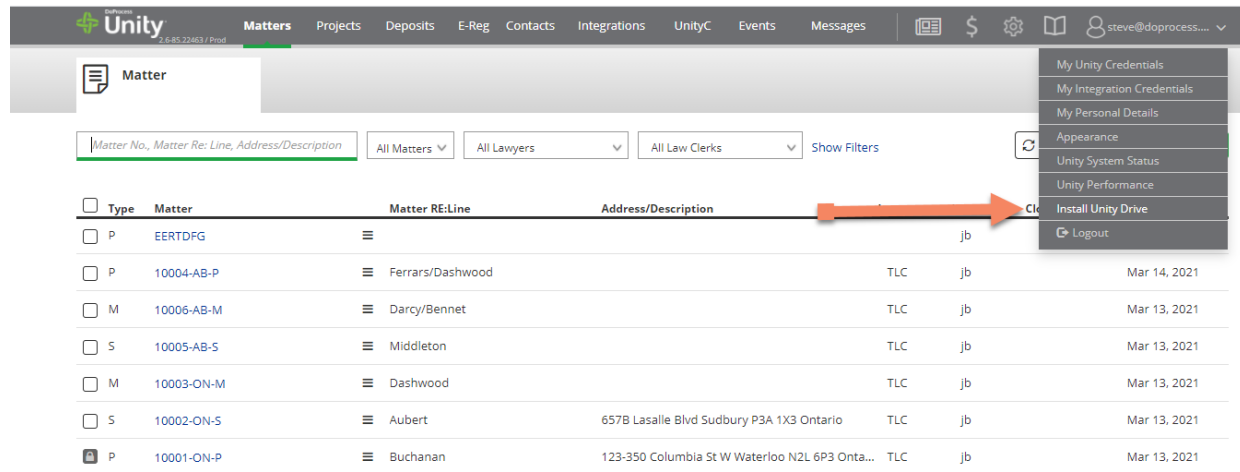
# Frequently Asked Questions

- What happens if I delete my UnityDrive folder? Do I lose all my Unity files?
  - No, in the event that you delete a UnityDrive file, folder, or the entire application, everything will still be available in Unity and will resync to your UnityDrive application the next time it is connected

# Getting Started – Installing UnityDrive

## Installation

- To get started you must install UnityDrive on your computer. To install UnityDrive, login to Unity and navigate to the user menu
- Choose the Install UnityDrive option and follow the prompts
- Note that UnityDrive must be enabled for your account



The screenshot shows the Unity web application interface. At the top, there is a navigation bar with the Unity logo and various menu items: Matters, Projects, Deposits, E-Reg, Contacts, Integrations, UnityC, Events, Messages. A user profile dropdown is visible in the top right corner, showing the user's name 'steve@doprocess...' and a list of options: My Unity Credentials, My Integration Credentials, My Personal Details, Appearance, Unity System Status, Unity Performance, Install Unity Drive, and Logout. An orange arrow points to the 'Install Unity Drive' option in the dropdown menu.

Below the navigation bar, there is a 'Matter' section with a search bar and filters. The search bar contains the text 'Matter No., Matter Re: Line, Address/Description'. The filters are 'All Matters', 'All Lawyers', and 'All Law Clerks'. A 'Show Filters' button is also present.

The main content area displays a table of matters with the following columns: Type, Matter, Matter RE:Line, Address/Description, and a column for 'CL' (likely Clerk). The table contains the following data:

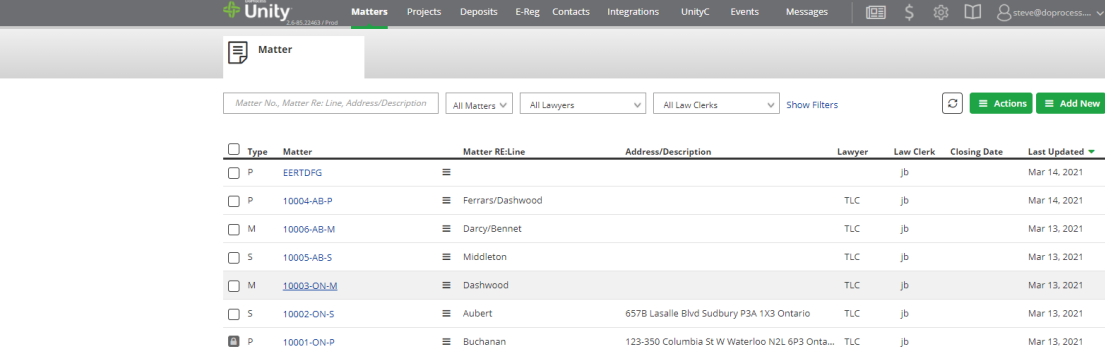
Type	Matter	Matter RE:Line	Address/Description	CL
P	EERTDFG			jb
P	10004-AB-P	Ferrars/Dashwood		TLC jb Mar 14, 2021
M	10006-AB-M	Darcy/Bennet		TLC jb Mar 13, 2021
S	10005-AB-S	Middleton		TLC jb Mar 13, 2021
M	10003-ON-M	Dashwood		TLC jb Mar 13, 2021
S	10002-ON-S	Aubert	657B Lasalle Blvd Sudbury P3A 1X3 Ontario	TLC jb Mar 13, 2021
P	10001-ON-P	Buchanan	123-350 Columbia St W Waterloo N2L 6P3 Onta...	TLC jb Mar 13, 2021



# Download and install

## Installation continued

- The application will download, click to install
- Note you may need windows administrative privileges to install
- Contact you office system administrator if required



The screenshot shows the Unity web application interface. The top navigation bar includes 'Unity' and various menu items like 'Matters', 'Projects', 'Deposits', etc. Below the navigation bar, there is a search bar and filter options. The main content area displays a table of matters with columns for Type, Matter, Matter RELine, Address/Description, Lawyer, Law Clerk, Closing Date, and Last Updated.

<input type="checkbox"/>	Type	Matter	Matter RELine	Address/Description	Lawyer	Law Clerk	Closing Date	Last Updated
<input type="checkbox"/>	P	EERTDFG				jb		Mar 14, 2021
<input type="checkbox"/>	P	10004-AB-P	Ferrars/Dashwood		TLC	jb		Mar 14, 2021
<input type="checkbox"/>	M	10006-AB-M	Darcy/Bennet		TLC	jb		Mar 13, 2021
<input type="checkbox"/>	S	10005-AB-S	Middleton		TLC	jb		Mar 13, 2021
<input type="checkbox"/>	M	10002-ON-M	Dashwood		TLC	jb		Mar 13, 2021
<input type="checkbox"/>	S	10002-ON-S	Aubert	657B Lasalle Blvd Sudbury P3A 1X3 Ontario	TLC	jb		Mar 13, 2021
<input checked="" type="checkbox"/>	P	10001-ON-P	Buchanan	123-350 Columbia St W Waterloo N2L 6P3 Onta...	TLC	jb		Mar 13, 2021

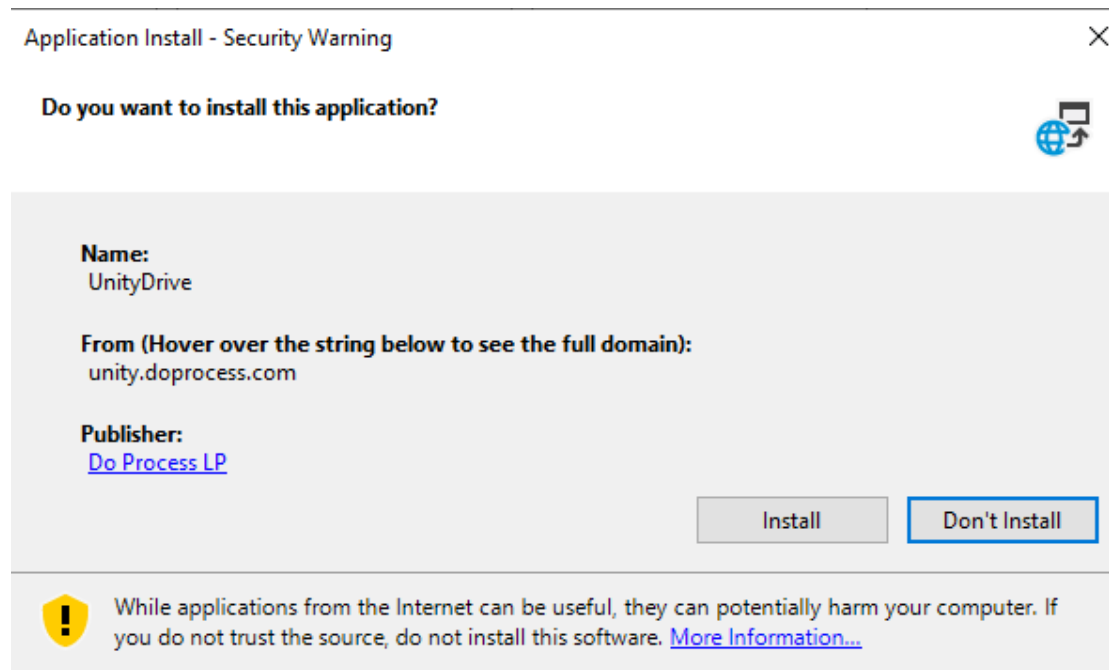
Click UnityDrive application  
to install



# Installation continued

More installation fun

- Select install from the application install dialog box



# Settings

## Specifying UnityDrive settings

After clicking install the install wizard will guide you through the process. Click Next



The screenshot shows the UnityDrive installation wizard's settings screen. On the left is a vertical navigation pane with four steps: Welcome (selected with a green diamond), Settings (radio button), Login (radio button), and Done (radio button). Below the pane is an 'Exit Setup' button. The main content area features the DoProcess UnityDrive logo, a 'Welcome to UnityDrive!' heading, and three paragraphs of text explaining the software's benefits and default settings. A green 'Next >>' button is located at the bottom right.

**DoProcess**  
**UnityDrive™**

### Welcome to UnityDrive !

*UnityDrive for your desktop is a quick and easy way for you and your law firm to access your Unity files.*

*With UnityDrive your files in Unity are synced directly from the cloud to your computer, providing you with local access to everything saved in Unity. Because UnityDrive files are synced to the cloud, any changes you make or files you add are automatically updated everywhere, you'll always have the latest version.*

*UnityDrive files are also available for offline access, making sure your Unity files are available even when your internet provider is not. Cached files sync back to the cloud when you're online, so the latest version is available on your matters.*

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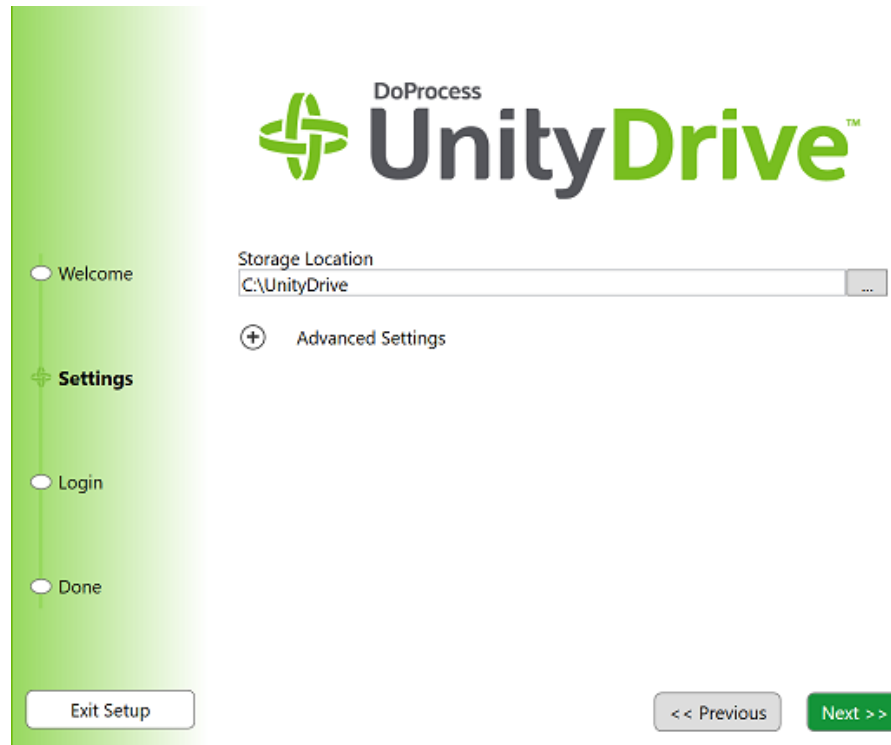
Exit Setup

Next >>

# Settings

More installation Fun

- Enter the desired storage location on your computer and click next



# Logging in to UnityDrive

- Enter your Unity account number, user id and password along with the code texted to your mobile phone when prompted. Unity drive will then create folders and documents on your local drive
- If you hover over the UnityDrive icon, you can see the number of documents downloaded to your UnityDrive folders
- **Note:** UnityDrive will initially sync matters that have been worked on in the last 30 days. Older Unity matters will sync only after they have been accessed in Unity

DoProcess  
**UnityDrive™**

Account Number

User Id

Password

Unity Drive 1.0.1.126; Connecting to https://unity.doprocess.com

Welcome  
Settings  
**Login**  
Done

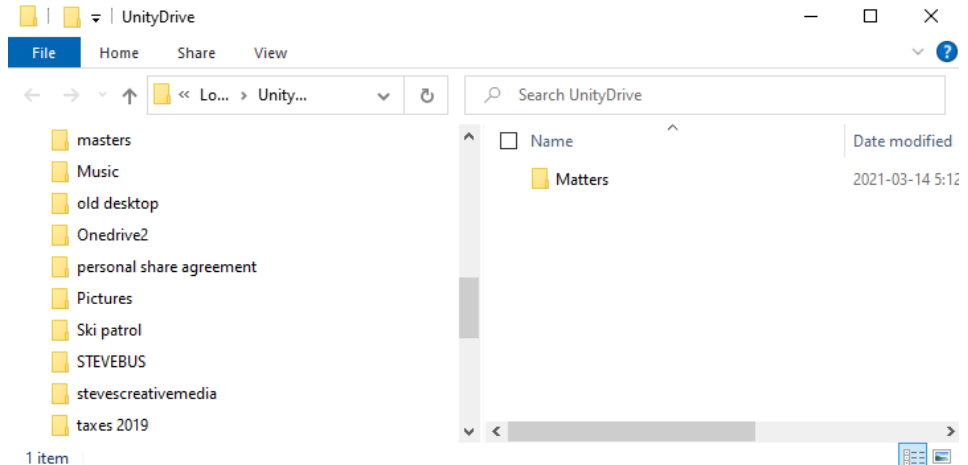
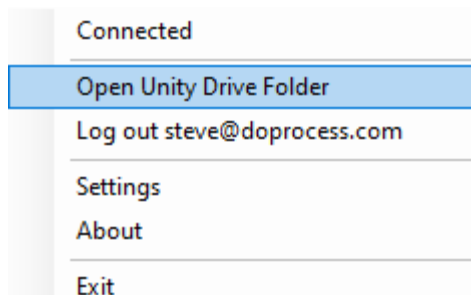
Exit Setup

<< Previous    Login >>

# Using UnityDrive

## Using Unity Drive

- To access UnityDrive folders, choose “open UnityDrive folder from the UnityDrive menu
- You can access UnityDrive like any other local desktop folder. To see individual folders click the matters folder






# Using UnityDrive

## Using UnityDrive

- Now the individual matter folders are displayed. Folder names match the matter number in Unity
- Documents from matter documents from each matter are contained in the folders

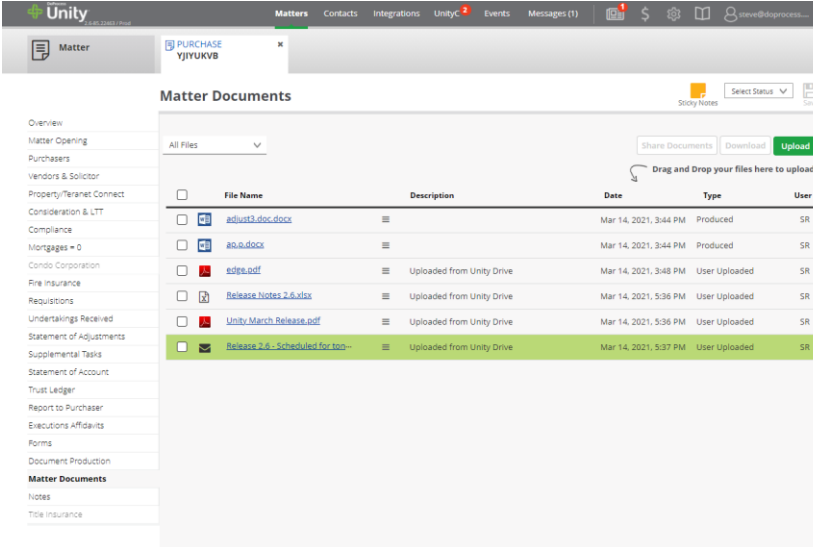
<input type="checkbox"/> Name	Date modified	Type
<input type="checkbox"/> ASASD	2021-03-14 5:12 PM	File folder
<input type="checkbox"/> DHGJGDHJ	2021-03-14 5:14 PM	File folder
<input type="checkbox"/> ERTERT	2021-03-14 5:15 PM	File folder
<input type="checkbox"/> ERTW5245	2021-03-14 5:12 PM	File folder
<input type="checkbox"/> EYTU567EHGJ	2021-03-14 5:15 PM	File folder
<input type="checkbox"/> FGHGFHDFGHDFGH	2021-03-14 5:12 PM	File folder
<input type="checkbox"/> FHGJFGHJ	2021-03-14 5:15 PM	File folder
<input type="checkbox"/> FJKHGJK	2021-03-14 5:12 PM	File folder
<input type="checkbox"/> RTYERTXFGHSFGH	2021-03-14 5:12 PM	File folder
<input type="checkbox"/> SASA23123	2021-03-14 5:15 PM	File folder
<input type="checkbox"/> UIOYUIO	2021-03-14 5:14 PM	File folder
<input type="checkbox"/> YJIYUKVB	2021-03-14 5:14 PM	File folder
<input type="checkbox"/> YUI	2021-03-14 5:12 PM	File folder

<input type="checkbox"/> Name	Date modified	Type
 adjust3.doc.docx	2021-03-14 3:44 PM	Microsoft Word D...
 ap.p.docx	2021-03-14 3:44 PM	Microsoft Word D...
 edge.pdf	2021-03-14 3:48 PM	Adobe Acrobat D...

# Using UnityDrive

## Using Unity Drive

- You can now save emails, attachments, and other documents from your desktop to your UnityDrive folders
- Content is then automatically synced to your Unity account and shown in the matter documents topic menu in Unity
- Any new documents created in Unity will automatically show in your local UnityDrive folder



The screenshot shows the Unity web interface for a matter titled 'PURCHASE vjyYUKVB'. The 'Matter Documents' section is active, displaying a list of documents. The interface includes a sidebar with navigation options, a top navigation bar, and a main content area with a table of documents.

File Name	Description	Date	Type	User
<a href="#">adjust3.doc.docx</a>		Mar 14, 2021, 3:44 PM	Produced	SR
<a href="#">ab.e.docx</a>		Mar 14, 2021, 3:44 PM	Produced	SR
<a href="#">edgs.pdf</a>	Uploaded from Unity Drive	Mar 14, 2021, 3:48 PM	User Uploaded	SR
<a href="#">Release Notes 2.6.xlsx</a>	Uploaded from Unity Drive	Mar 14, 2021, 5:36 PM	User Uploaded	SR
<a href="#">Unity March Release.pdf</a>	Uploaded from Unity Drive	Mar 14, 2021, 5:36 PM	User Uploaded	SR
<a href="#">Release 2.6 - Scheduled for top-</a>	Uploaded from Unity Drive	Mar 14, 2021, 5:37 PM	User Uploaded	SR