product**info**

DocuWare 5

Integrated
Document Management

The DocuWare 5 document management system is state-of-the-art software for integrated document management. It can automatically process any type of document regardless of its source, with internal control procedures that help you meet audit and compliance requirements. DocuWare 5 imports them, classifies them, adds a fulltext index and makes them available for onward processing.

Additional Records Management functions ensure that all access is secure, controlled, and logged. Enhanced with workflow functionalities, Web Content Management and universal integration functions, DocuWare 5 provides powerful Enterprise Content Management (ECM) functionality for enabling expansion throughout an organization.

DocuWare 5 offers comfort and security. Even the most exacting users will be impressed not only by the comprehensive features, but also by its user-friendliness and simple administration—all of which, together with the extensive integration capabilities and optimum security, combine to make DocuWare 5 a product that can grow with your requirements well into the future.

Contents

1. Import documents

The performance and acceptability of a document management system depends largely on how quickly and easily documents of many different types, from a wide range of sources, can be imported into the system. The basic principle of DocuWare is geared towards the normal office environment: documents arrive first in electronic in-trays or baskets, where they are clipped together and sorted. From here they are stored in file cabinets. The file cabinets represent the document pool that contains all the information needed for accessing and

controlling the workflow over the network. DocuWare has powerful import features, which can be automated with a variety of options, thereby ensuring that all document types are filed away in the right place.

Paper documents
Letters, business documents, logs, drawings, notes and other printed documents are imported using most any type of scanner. DocuWare integrates numerous convenience features, from controls for simple workstation devices to high-performance scanners. Similarly, network scanners and multifunction devices (digital copiers) can be integrated directly in the DocuWare system without the need for additional software. Once scanned, documents are held in the DocuWare baskets for further processing or ready for storing in the file cabinets. One option extracts data from documents using OCR or barcode recognition during the scanning process and then uses this data to automatically categorize, index and store the document in a file cabinet. In addition, DocuWare supports all the main import and evaluation programs via universal interfaces.

DocuWare – Highlights
- One document pool for all of your documents
- Information available around the clock, around the globe
- Simple search, fast retrieval
- Integrates any workflow
- Optimum security

MS Office, CAD, and other PC files
DocuWare offers several methods of importing files. Drag them into DocuWare baskets with a mouse or use the Import menu. DocuWare is able to monitor any folder in the file system and can import files recently saved there, either into baskets or directly into file cabinets. All the file information can be used to categorize and index the files. This information can be entered automatically or manually and stored with the files. DocuWare has a special add-in for Microsoft Office applications which transfers documents directly from Word, Excel or PowerPoint into DocuWare baskets or file cabinets. Similar functions are offered by third-party providers for other application programs. The DocuWare TOOLKIT also makes it easy to integrate your own storage functions. All files are imported unchanged, in their original format. DocuWare allows you to specify which program is used to display and which to edit each file type. By default, Docu-Ware displays documents in its own viewer and uses the operating system settings for editing. As an alternative, documents can be filed by printing them with the TIFFMAKER function. Printing from the original application using TIFFMAKER generates a true and unalterable TIFF or PNG image from the print data stream and stores it in the DocuWare file cabinet. With documents of the same type, such as quotations or logs, the categorization and index data is read directly from the document and used to store the documents completely automatically.

Enterprise Report Management
DocuWare can be integrated in any business solution by means of universal functions and interfaces. In-house documents such as outgoing invoices, journals, reports, and other lists are archived by DocuWare fully automatically. It imports them either using the Windows operating system's print data stream and TIFFMAKER, or by importing printer spool files from mainframe environments, using the optional COLD/READ module. Print data is stored in individual documents, while the index data is extracted and stored in the file cabinet.
Optionally, DocuWare can also overlay forms and letterheads. Legacy data, or data that must be retained for access in the future for legal reasons, is imported by DocuWare automatically. If the data is needed at a later date by the original system or an analysis tool, DocuWare exports it in its original format and with the original file name. DocuWare also offers special modules for seam-

lessly integrating the SAP R/3 product family and accessing R/3 documents—even without the SAP system. It also provides certified interfaces to Navision and many other ERP systems.

E-mail
The ever rising tide of e-mail can also be easily stored. DocuWare does this either in a separate e-mail repository or stored together with other thematically related documents on the basis of common criteria. DocuWare can import e-mail from Microsoft Outlook and Exchange, and also optionally from Lotus Notes/Domino. Sender, recipient, date, subject and other mail information is used for automatic indexing. Names of persons and companies are supplemented with information from address books and other databases. Archiving can be done either fully automatically or with confirmation and/or correction by the user.

2. Storage is organized and secure

DocuWare lists all documents, regardless of origin, together in the same document pool — "file cabinets" — according to standard criteria. This applies to business documents (whether scanned or created in your own data processing system), correspondences, drawings, images and all kinds of documentation as well as e-mail and Microsoft Office files.

Open standards for documents and index data
Document files are saved to the file cabinets either in their original format or as TIFF or PNG images using the TIFFMAKER printer driver which comes standard in DocuWare. A metafile in XML format is saved for each document file. It records markups, electronic stamps, signatures and a duplicate of the index data for each document. The main storage location for index data is a relational database linked to the document files. This ensures that all documents can be retrieved easily and enriched with a fulltext index if required.

Automatic filing
DocuWare offers various methods of automatically integrating index data from external sources such as text files, databases, and address books, which facilitates correct indexing. Some of these options are standard features while others require add-on modules.

Demand-led storage systems
DocuWare file cabinets store documents through their life cycle: from the moment they are imported or created, through editing and processing, to record retention requirements. It supports all the main storage technologies: simple hard-disk and RAID systems, CD, DVD and WORM in manual or jukebox operation, plus content addressed storage (CAS) and storage area network (SAN) solutions. The Integrated Hierarchical Storage Management (HSM) ensures that documents are automatically transferred to the most suitable storage medium according to their current status, e.g. how often they are accessed or on the basis of legal requirements.

Autonomous file cabinets
All or selected documents in a file cabinet can be read from a CD or DVD, without there having to be a DocuWare client or software on the user's computer to display the documents. This allows you to distribute catalogs, lists and technical drawings easily on CD/DVD to customers and vendors who do not have an installed DocuWare system.
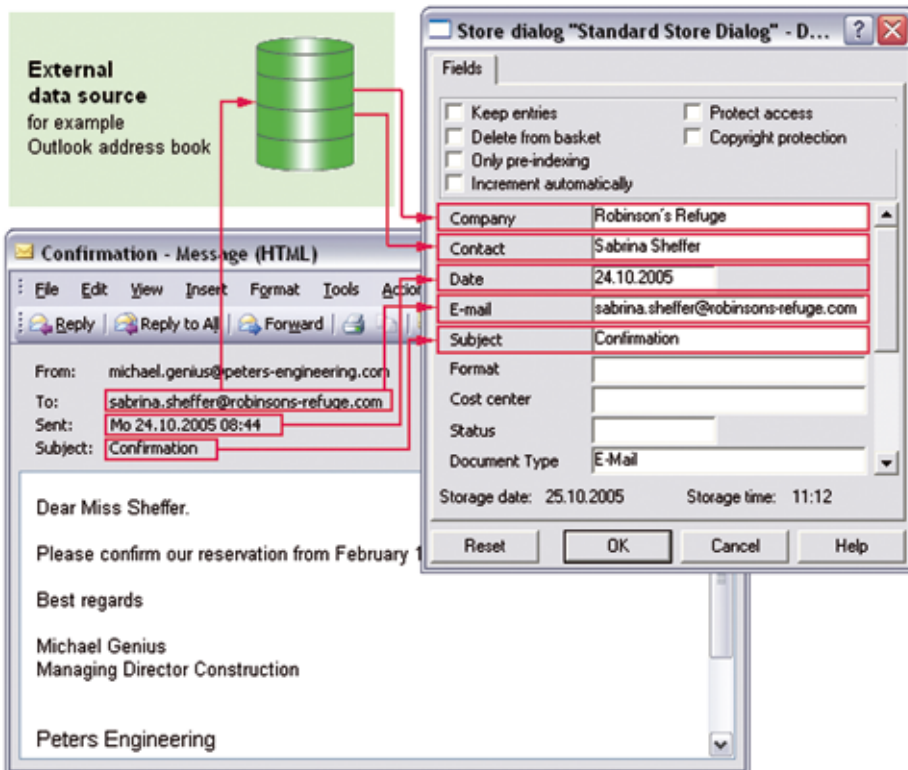
DocuWare automatically imports e-mail information including sender, recipient, date and subject for document indexing

3. Records Management: controlled storage and access

DocuWare has security mechanisms for internal control and meeting audit requirements, protecting documents from importation through long-term archiving on read-only media and storage systems. DocuWare helps you meet your legal and regulatory standards including: AO, HIPAA, Basel II and Sarbanes Oxley. Retention and deletion periods are monitored automatically. The DocuWare database is capable of tracking storage locations and retention periods of physical paper files.

Legally compliant document and data access
DocuWare ensures that data, which may be needed for legal reasons, can be accessed throughout the entire statutory retention period by means of export functions. You can also create form templates in DocuWare to ensure that spool data—which is imported automatically from business solutions using either Computer Output on Laser Disk (COLD) or the TIFFMAKER Windows printer driver—can be reproduced in its original format at any time.

Tailor-made access rights
Access to documents is reliably controlled through a detailed authorization concept consisting of groups, roles and profiles. This concept ensures that employees, auditors, customers and suppliers will only see the documents they are allowed to by their level of authorization. Direct access to document files via the file system is not permitted. And log functions make it possible to prove who accessed and/or modified a document and when, even years later.

Electronic signature
DocuWare accommodates all forms of electronic signature: simple, advanced, and qualified signatures as well as time stamps and handwritten signatures. They are all seamlessly integrated in the DocuWare system and thus available to all users. They provide an additional way of guaranteeing the integrity of documents and the authenticity of users.

Through its comprehensive security features, DocuWare supports compliance within the company.

The status line of the DocuWare Viewer shows whether a document has a qualified electronic signature and (after running a check) whether the signature is valid

4. Find documents

The acceptability of a document management system depends mainly on how quickly it finds the information you are looking for. DocuWare makes this both simple and convenient: search terms can be entered in full, in part, in combination or selected from lists. Categorized and fulltext searches can be combined. Whichever method you use, the results are returned in a matter of seconds in a list that you can sort as you wish. File cabinets can also be displayed in a hierarchical tree structure.

Fulltext searches
DocuWare's powerful fulltext retrieval feature can be combined with all supported database systems. In addition, this feature extracts text from any scanned document. The fulltext search also allows wildcards before and/or after text, for example "*storage". Occurrences of the text are highlighted in color in the DocuWare viewer.

Task–specific search and storage profiles
Administrators can centrally define different search and store menu dialogs as well as result lists to one file cabinet or to multiple file cabinets. These dialogs specify which fields are available for input and which can be initialized with default values. The various dialogs can be assigned to individual users or roles. Users work either with a dialog that they need for their own specific tasks, or they choose the dialog they need for a particular file cabinet from a list in the main window. This is convenient for documents that need to be accessed regularly and for document types such as contracts or logs that must be filed in a particular way.

Integration in other programs
Documents in DocuWare can be accessed and displayed directly from other applications. DocuWare provides a number of options for this, including a LINK module that can be configured using menus, a Software Developer Kit (SDK) for C, COM and .NET interfaces, browser integration, and a SAP interface. Other specific interfaces to ERP solutions are supplied by partner companies.

5. Edit documents

DocuWare provides extensive editing features for working with "live" documents.

Version management
Documents stored in DocuWare can always be edited with the program that created them if stored in their original format. Depending on your profile settings, this happens either directly in the file cabinet or after the document has been checked out. When documents are checked out, the version in the file cabinet is locked for editing by others and a new version is created when the document is checked back into the file cabinet. The previous versions are retained for inspection and tracking purposes.

Markup, commenting and stamping
The DocuWare Viewer has powerful tools with which to edit documents. You can add text notes and comments, freehand markings, text marker highlights and stamps to almost any document format. The documents themselves remain unchanged.
All the elements are captured as an overlay and stored separately. Stamps can be set to lock and release documents and also integrate electronic signatures. And if you have a Tablet PC you can easily enter handwritten notes and signatures.
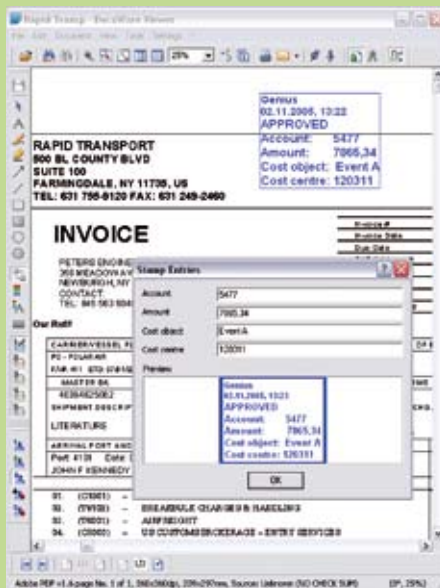
6. Workflow

DocuWare helps you to automate your document-based business processes. It ensures that documents always reach the right person, and by using the integrated stamps and job lists in the CONTENT-FOLDER module, configuring processes couldn't be easier.

Controlling the process
Workflows are controlled by means of simple acceptance and rejection stamps or using text within a stamp. Setting a particular stamp or entering values in a stamp can determine the next step of the workflow. It defines who the document should be sent to next. The use of stamps for process control is modeled after paper-based processing and makes the applications easier for users to understand. Document statuses can be set either automatically using the DocuWare AUTOINDEX module or via the programming TOOLKIT. This allows external programs to influence individual workflow steps.

Flexible job lists
Job lists are defined with CONTENT-FOLDER. As processing lists, they contain all the documents currently awaiting processing by a particular person. As monitoring lists, they offer an overview, for example, documents awaiting approval.

When a stamp is applied to a document in the DocuWare Viewer, information is stamped on the document that can simultaneously be used to define the document's workflow

Maximum transparency
Besides its user-friendliness, the main characteristic of a DocuWare workflow is the transparency. Each process step, controlled using a stamp, is automatically initiated by a stamp placed on the document with the date and user name. The entire process is visible on the document itself (as with paper-based processes), and can be understood even by someone unfamiliar with the workflow process. Depending on your internal guidelines, you can choose to either force or suppress the display of stamps and other notes on screen and on the printed document.

7. Remote locations and mobile users

One of the important benefits of electronic document management is being able to access documents online, regardless of location. The DocuWare 5 Client can have authorized access to file cabinets and documents in the central document pool over the Internet from anywhere in the world and with full functionality. All you need is the right IP address configured on the client PC.

Synchronize file cabinets
File cabinets at different locations can also be synchronized with one another. A finely granulated system of rules determines which documents in a file cabinet in the central document pool are to be synchronized with the file cabinet at a branch location in the next synchronization run, and vice versa. This ensures that the head office and the branch can conveniently work with the same documents with minimum response times and without overloading landlines. This is an optimum way of integrating both domestic and foreign branches and subsidiaries in your document management system.

Work offline on a laptop
DocuWare uses the same synchronization technology to integrate mobile users on laptop PCs. Sales people or engineers at job sites need all the infor-

mation about their customers to be up to date at all times. E-mail and other documents they create themselves are filed in the laptop file cabinet. Then, at the next synchronization, they are automatically transferred to the office, where they become available to in-house staff. The fact that both in-house staff and staff in the field have access to the same, complete information, improves not only your customer service but employee satisfaction as well. And it also means you can extend your workflow processes to include mobile users.

Remote location workflow processes

The DocuWare architecture makes it easy to extend document-based processes to home offices and other remote workstations. Mobile users can be integrated: quotes and invoices can now be approved offline on the laptop; the workflow step is then transferred to the office during the next synchronization, where DocuWare continues the workflow. Including remote workstations and mobile users in the electronic process control adds even more to the efficiency of this system when compared to paper-based workflows.
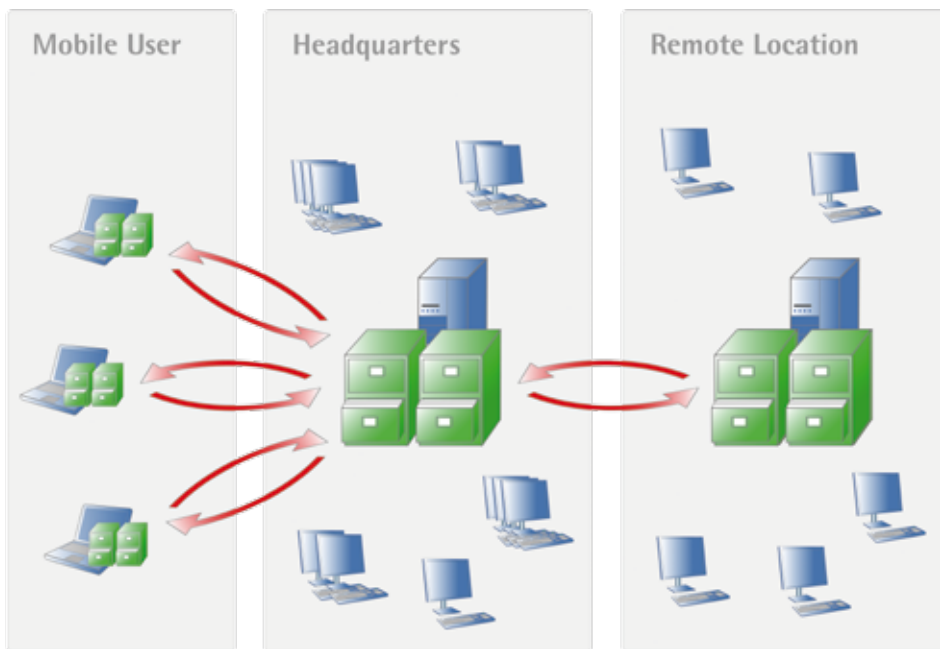
Synchronizing DocuWare file cabinets with file cabinets at other locations or on laptops

8. Web Content Management

The DocuWare INTERNET-SERVER module guarantees access to documents from any web browser; from anywhere in the world at any time.

Flexible integration
The DocuWare web architecture is extremely user-friendly. The user functions for accessing documents are laid out as a Thin Client, which runs on any browser and any operating system. The dialogs can be adapted to any website using style sheets and simple HTML programming and can be integrated in portals. The server component runs on a variety of web server systems and its functions can be customized individually.

Portals for employees, vendors and customers
The flexibility and integration capability of the DocuWare web architecture make it extremely easy to provide user-specific information over the Internet. DocuWare provides important features for building a customer or employee portal or for integration in existing portals. Customers can access the documents relevant to them online, including invoices and delivery advice notes. Employees can access their own documents when traveling or from home. And prospects always have access to the latest product information, all of which enhances customer service and increases productivity. Sophisticated security mechanisms protect against unau-

thorized access even on the Internet. With the standard DocuWare tools for capturing and editing documents, the entire document pool can be accessed for easy maintenance, or to be published. Your employees need no special knowledge in order to present information on the web. They just need authorization for the DocuWare system.

The INTERNET-SERVER add-on module allows you to view documents stored in DocuWare from any normal web browser. Storing documents can also be done using INTERNET-SERVER

9. Configuration

DocuWare is well known for the simplicity of its installation and system administration. Although the number of functions have multiplied compared to earlier versions, this aspect still holds true for version 5. Simplicity is the only way to ensure that people actually use the many features of document management.

Architecture for the future

DocuWare 5 has a multi-tier architecture that distinguishes between the client, server and infrastructure components. Both the user client and the administration client use TCP/IP to access the Authentication, Content and Workflow Servers via a communication channel. For their part, these DocuWare server modules communicate directly with the storage systems, databases and user directories. This creates the conditions for a system that has maximum security while being easily scalable.

Central administration suite

The entire administration, from server availability to user administration, from file cabinet administration to setting up workflows, is done from the centralized DocuWare Administration. Even server modules and users at remote locations are managed from here. With the ENTERPRISE Server version you can also set up and manage several organizations within the same system—especially useful for running multiple clients in a computer center.
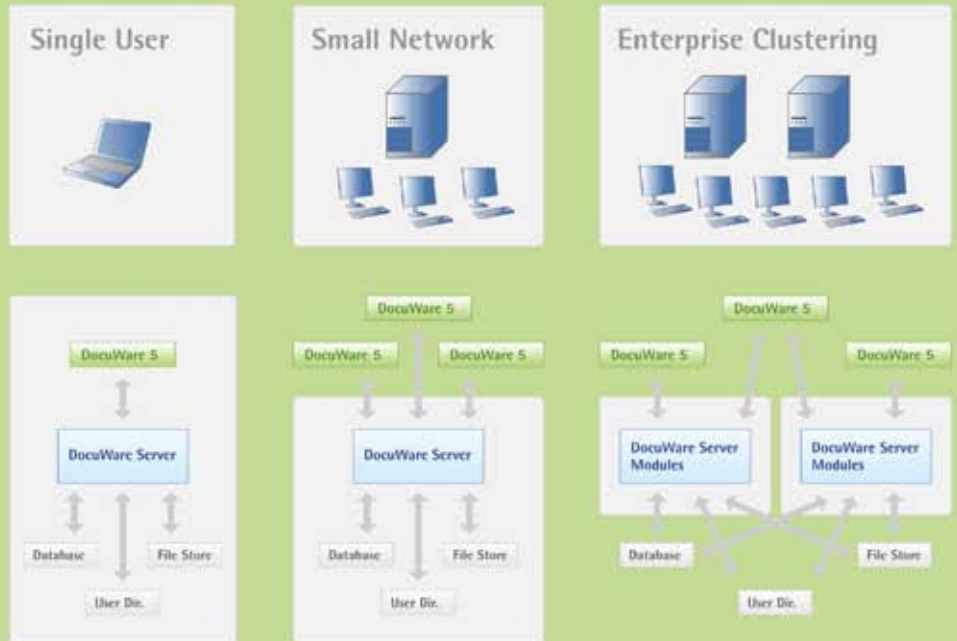
DocuWare adapts easily to growing user numbers

Scalability

If you have a large number of users, you can distribute the DocuWare server modules over several computers. Spreading the load in this way ensures that you get the best performance on all workstations. DocuWare does this by always using the same components and functions, whether on single workstations or for distributed group solutions. As a result, the administration remains simple and transparent, even when the system is extended to include new departments and locations.

Security

DocuWare's basic architecture alone offers a high degree of security against unauthorized data access. DocuWare uses the "Ticket-Granting-Ticket" authentication procedure. The identification of single users, via both the DocuWare login and at single sign-on, with automatic Windows authentication, is absolutely secure. And if you are using the ENTERPRISE Server version, you have additional security functions available to you that protect highly sensitive documents from being accessed even by system administrators. Extra protection against manipulation is provided by logging all system changes in detail. DocuWare also effectively protects you against data loss: all index data is stored in duplicate, once in the database and once in the documents' XML metafiles. This makes it easy to restore databases if necessary. Depending on the implementation scenario, document files are backed up using normal backup tools or duplicated with DocuWare's own tools.

Add-on modules

A document management system must be capable of being integrated into an existing IT environment. With DocuWare, you get optimum data and document exchange with third-party systems, side by side with minimum administration. The basis for this optimum integra-

tion in specific user environments is the numerous optional expansion modules over and above the many standard features and interfaces that DocuWare provides. These modules make it possible to customize the system to any individual requirements. A brief summary of

these add-on modules is provided here. Detailed data sheets about each module are available from the DocuWare website at http://www.docuware.com.
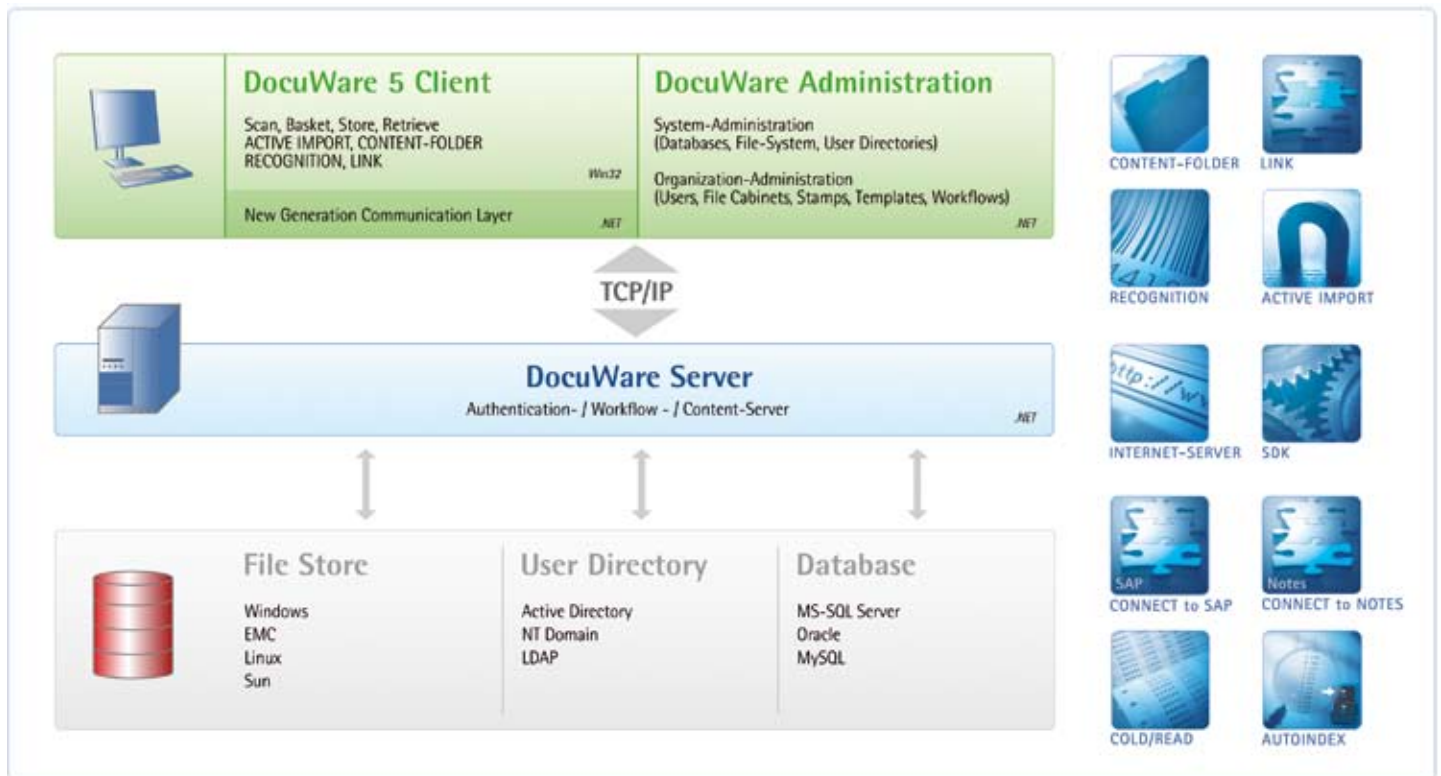
Add-on modules allow DocuWare to integrate perfectly in the customer's IT landscape

CONTENT-FOLDER

CONTENT-FOLDER manages document-based business processes electronically by combining and distributing stored documents in virtual work folders. Task lists can be defined and assigned to employees; deadlines are easily and reliably monitored.

LINK

LINK allows the full integration of archived documents in existing programs. In Windows applications, LINK displays linked archived documents at the touch of a button or copies search terms to DocuWare—all without any extra programming.

RECOGNITION

RECOGNITION reads barcodes and text from scanned documents using OCR. This information is imported into predefined database fields for automatic indexing of documents.

REQUEST

DocuWare REQUEST makes complete file cabinets or selected documents available on CD/DVD. Convenient search functions as well as viewing and/or editing programs for different file formats can be added if required. Documents can be read without a DocuWare Client.

ACTIVE IMPORT

ACTIVE IMPORT monitors folders in a file or e-mail system and imports the files stored there into DocuWare baskets and file cabinets. Documents are automatically indexed. ACTIVE IMPORT allows multi-function products (digital copiers) to be integrated in DocuWare, and supports Microsoft Outlook and Exchange as well as other MAPI mail systems.

INTERNET-SERVER

INTERNET-SERVER enables controlled access to documents stored in DocuWare from a web browser on the Internet or Intranet from anywhere in the world. The user functions for accessing documents are laid out as a Thin Client, which runs on any browser and any operating system.

SDK

Powerful API interfaces and OLE automation allow the main DocuWare functions to be controlled from other applications (TOOLKIT for C and VB, TOOLKIT.NET Interface and GAPI for C# and VB.NET)

CONNECT to SAP

With the SAP-certified interface CONNECT to SAP, DocuWare has enhanced SAP -with functions for archiving documents and data. Even without SAP, DocuWare can provide access to documents and easily integrate external scanning service providers.

CONNECT to NOTES

DocuWare imports e-mail and documents from Lotus Notes and archives them using the CONNECT to NOTES add-on module. These are categorized and indexed automatically using information in the e-mail such as sender and recipient. And vice versa, DocuWare sends scanned and archived documents for further processing in Lotus Notes.

COLD/READ

COLD/READ reads and archives the spool files of invoices, delivery notes, account statements and journals generated for printing by data processing systems. The data is reproduced in its original form by overlaying forms or letterheads.

AUTOINDEX

AUTOINDEX imports information from other applications, such as financial accounting programs, and sends it to the file cabinet as indexing and search terms for documents.

Features

Functions marked with * are only available when using the ENTERPRISE Server. All other functions can be used with PROFESSIONAL and with ENTERPRISE Server.

Documents

■ Capturing Documents
- Scans paper documents from business card size to E-size drawings in B&W and color
- Supports TWAIN and ISIS scanner drivers
- Standard image file formats: TIFF, JPEG
- Memory requirement per scanned letter format: approx. 50 KB (B&W)
- Add-in for MS Office for the direct storage of Word, Excel and PowerPoint documents
- Import documents from file system by drag & drop or via menu command in DocuWare
- Import any PC files with automatic or manual assignment of viewing and application program
- Monitor file folders for automatic import of files stored there
- Automatic filing of e-mail

■ TIFFMAKER
- Windows printer driver for converting documents out of Windows applications into unchangeable graphic format files
- Can be used in conjunction with existing printer drivers, enabling automatic filing during normal printing or faxing
- Optional layering of scanned letterhead, invoice forms, etc.
- Direct storage in DocuWare file cabinets
- Automatic extraction of index criteria from the document

■ Editing Documents
- Mark and annotate documents with overlays
- Text passages can be highlighted using a rectangle or circle containing any color selected, in either transparent or opaque mode
- Freehand writing and drawing for mouse and Tablet PC digitizer pen with adjustable line colors and thickness
- Textmarker function at the click of a button for mouse and Tablet PC digitizer pen
- Notes and text can be positioned anywhere; font, font size and color can be customized
- Five overlay levels can be defined (each may be activated and deactivated separately)
- Printing overlays are optional
- Scanned documents always remain "genuine," i.e., unaltered, tamper-free
- Option: merge comments with document
- Option: automatically merge overlays with document during export (graphic formats)
- Voice annotations can be attached
- Version management: check-out button with document lock-out in file cabinet
- Direct editing of documents in a file cabinet
- Extract text from graphic documents by OCR; copy to clipboard or enter in store dialog
- Barcodes: read directly from document, copy to clipboard or enter in store dialog

■ Stamping Documents
- Customization of personal and public stamps, e.g. with scanned-in signature as well as stamp date, time and user ID of person signing
- Assignment of stamps to users and profiles
- Stamps with handwritten signatures for Tablet PCs; maximum security by storing biometric information
- Automatic updating of up to five selectable index entries in a document
- Customize stamps by adding form fields: input variable information when applying stamps (including using fixed and external selection lists)
- Accelerate the workflow: option to automatically close viewer after applying stamp
- Use stamps for both scanned documents and for Microsoft Office, PDF and other file formats

■ Electronic Signatures
- Simple, Advanced and Qualified Electronic Signatures
- Electronic Time Stamp
- Support for mass signatures: automatic placement of signature stamps for all documents in basket, e.g. for scanned documents; optional quality control by displaying every X document
- Signature is added by placing stamp; no other user interaction necessary on DocuWare client
- Simple integration of external Time Stamp Services for creating signatures
- Custom definition of signature content (e.g. current page, current page with overlays, document, document and overlays, etc.)
- Signature types: set up requirements for using stamps; filter for certification authorities
- Signature check/verification takes place within system

■ Organizing Documents in the Basket
- Electronic in-baskets temporarily hold scanned or imported documents
- Pre-sort documents by moving and copying with drag & drop
- Staple to create multi-page documents/unstapling
- Display documents as lists or thumbnails
- Choice of basket color
- Auto rotate: correct alignment of upside-down/skewed documents
- Export of documents out of a basket

■ Displaying Documents
- Display computer-generated files with either DocuWare viewer or the original program, or viewer of choice
- Support for all common file formats
- Display different file formats within a logical document-ideal for archiving e-mail with attachments
- Three parallel display windows
- Print directly from the display, including selected sections
- Copy selected sections to the Windows clipboard as an image or text (with integrated OCR) and paste into other applications
- Convert scanned documents into other image formats, e.g. BMP
- Browse directly within viewer to next or previous document in result list or basket

■ Storing Documents
- Index words can be entered using customizable store dialogs
- Support for input using field dialogs
- Check index terms for plausibility, validation
- Over 4 billion documents per file cabinet
- Manage scanned documents, COLD data, PC files and e-mail in shared file cabinets
- Option: store files and references instead of file copies
- Option: save compressed files*
- Option: save encrypted documents by integrating AES and RSA procedures*
- Fast indexing by pre-indexing documents in a basket
- Adopt search terms from stored documents during storage process
- Select lists of previously entered terms for each database field
- Fixed select lists for certain fields to ensure single classification structure
- External select lists with classification terms provided from external files or databases
- Automatic storage of pre-indexed documents in batch mode
- Scanned letter size pages per CD: 12,000 approx. DVD: 88,000 approx.

■ Finding Stored Documents
- Search using index words and with wildcards
- Check index terms for plausibility, validation
- Support for input using field dialogs
- Complex searches with relational or logical operators and by alphabetical ranges within individual fields
- Hierarchical search with Explorer display
- AND/OR searches within one field or between fields
- Select lists for each database field
- Search in one or multiple file cabinets
- Display retrieved documents along with the corresponding index words in a result list
- Dynamic linking: retrieve documents with identical index entry in a defined field directly from the result list or viewing program
- Refine hits in the result list using a nested search
- Export located documents to another file cabinet, basket, file directory or e-mail message
- Export retrieved database entries to dBASE or *.txt file
- Print, fax and send retrieved documents

■ Fulltext Indexing and Searches
- Automatic fulltext indexing of a file cabinet regardless of database used
- Powerful OCR reads text from scanned documents, while an integrated text filter sorts through text and other common PC files
- Locate documents using words from document text, memo fields, COLD files
- Search with wildcards before and after a word
- Highlight located hits when displaying documents in viewer for scanned, COLD and other CI (Coded Information) documents
- Option: display hits after fulltext search with document page in the viewer

■ E-mail/Fax

- Send any document or individual pages via e-mail directly from DocuWare, from basket, file cabinet or viewer
- Use MAPI-compatible mail systems (MS-Mail, Internet, etc.)
- Automatic storage of incoming and outgoing e-mail from MS Outlook using basic integrated version of ACTIVE IMPORT
- Use mail attributes such as sender, recipient, date, subject as index criteria or index words in file cabinet
- Automatically assign index criteria of filed e-mail using a matchcode, e.g. an e-mail address
- Send faxes directly from DocuWare using normal Windows fax programs

Usability

- Size and position of main DocuWare window, icon bars, viewer, baskets, result lists and search/store menu can be customized and adjusted for different monitor resolutions
- Column width, icon bar and buttons in result list can be customized
- Search/store dialog and result list can be customized for individual users or groups
- Maximum reading clarity due to interpolation procedure for optimizing display
- Comprehensive context-sensitive help in both the DocuWare client as well as DocuWare Administration

System and File Cabinet Administration

- Access to DocuWare system optionally via Intranet or Internet, communication using standard protocols (TCP/IP)
- User authorization via login name and password of user or Single Sign-On
- DocuWare Administration: transparency using a directory tree, all configurations within one program
- System, organization and file cabinet administration all handled with DocuWare Administration
- Control accessible functions for users via rights: settings options for which users have no rights are not displayed
- Client capability: multiple organizations possible per system*
- Simultaneous access to file cabinets from two different systems, e.g. network installation and mobile workstation
- Option: irrevocable document deletion*

■ DocuWare Servers

- Authentication Server: manages licenses and users, granting of user access to features and documents, manages all settings
- Content Server: manages documents, access control to files and index data
- Workflow Server: manages and controls batch processes and workflows

- SAP HTTP Server: stores documents from SAP in DocuWare
- Load balancing: automatic load balancing when accessing file cabinets*

■ System Administration

- Management of the overall DocuWare system and its integration in the IT environment and connection to external service providers
- Storage paths: central administration independent of physical medium
- Connections and authorizations (databases and files): administered centrally at system level, all can be integrated via databases tested by DocuWare (MS-SQL, Oracle, MySQL)
- Administration of DocuWare Servers: Authentication Server, Content Server, Workflow Server, SAP HTTP Server
- Performance and scalability: use of multiple Content Servers on different physical machines (volume), use of multiple databases: file cabinets can be distributed across multiple databases on different physical machines (volume), no restrictions in terms of database program (different databases allowed within the same system)

■ Organization Administration

- Management of user organization, licenses, feature rights, users, stamps and select lists
- Static select lists: one-time read of data from external systems (databases, text files) or one-time entry of data
- External select lists: dynamic queries of external systems generate select lists (e.g. ERP systems, databases)
- Assignment of select lists to index fields and menus in file cabinet administration
- Management of display, editing programs including setting parameters for opening etc.
- Definition of validation configurations using program libraries
- Central setup of baskets for clients or one basket on network for multiple clients

■ Rights Administration

- Central administration of users and rights in DocuWare Administration
- Function rights: access to individual menu functions, stamps, select lists and templates; definition at organization level
- File cabinet rights: access rights to documents in file cabinets, definition at file cabinet level
- Profiles: grouping of functional rights into function profiles and file cabinet rights to file cabinet profiles
- Roles: combination of function profiles and file cabinet profiles according to task
- Predefined roles: System Administrator, Organization Administrator and File Cabinet Owner
- System administrator: administers the overall DocuWare system
- Organization administrator: administers organizational settings, e.g. user and rights management
- File cabinet owner: administers the structure of rights within "his/her" file cabinet

■ User Administration

- Optional structuring of users into groups
- Direct assignment of individual rights, profiles and roles to different users
- Assignment of roles to groups
- Easy user and group administration: integration and running synchronization of users and groups in external Directory Services with those of a DocuWare system, support for LDAP and Active Directory Services

■ File Cabinet Structure and Rights Administration

- Option: implementation of a hierarchical file cabinet structure (tree view)
- Specify criteria to link a displayed document to associated documents
- File cabinet identification using globally unique ID
- File cabinet name: up to 64 characters in length
- File cabinets on hard disk, CD, DVD, WORM in manual or jukebox system, Content Addressed Storage (CAS), e.g. EMC Centera*, Storage Area Network (SAN), NetApp Storage Solutions*, RAID systems; hierarchical storage management
- Organization of storage into logical disks, user-defined capacity restrictions, e.g. on CD/DVD
- Up to 999,999 logical DocuWare disks per file cabinet
- Document management via integrated or external databases
- Select database types for each file cabinet individually and combine in any configuration within a DocuWare system
- Automatically generate log fields for each file cabinet: user name and date, time of storage, of last change and of last access
- Number of database fields (text, numeric, date) per file cabinet: max. 50
- Text fields: length 1-255, any size within is possible
- Maximum length of numeric fields depends on database type selected
- GMT as internal time format for all date and time information
- 8 keyword fields per file cabinet, each with up to 64 entries (maximum keyword length: 20 characters)
- Assignment of select lists to index fields and dialogs
- Detailed rights definition (e.g. display, edit, delete, change) for each file cabinet and index field and in relation to overlays
- Additional definition of field rights: field must not be empty, entry must be contained in select list, no new entries; access to search dialogs, store dialogs and result lists
- Link file cabinet rights with index entries of a document (index filter)

■ Automated Document Handling

- Automatic workflows for synchronization, export, migration from/to file cabinets
- No limit in number of automatic workflows
- Managed with DocuWare Administration
- Custom set-up of filter criteria for documents
- Optional fixed login in file cabinets for workflows

DocuWare

File Cabinet Synchronization
- Synchronization of central master file cabinets and decentralized satellite file cabinets
- Satellite file cabinets on laptops (important documents available locally, make changes locally) or at remote company locations (synchronization carried out at times of minimal network load)
- Different structures in master and satellite file cabinets possible, mapping of index fields
- Detailed transfer options from master file cabinet to satellite file cabinet and vice versa
- Conflict resolution configurable using option settings
- Option: start synchronization workflow from client

Export
- Export existing file cabinets within system, selected file cabinet can be a new or existing file cabinet
- Export to another system

Migration
- Automatically copy/move documents e.g. from hard disk to optical media within a file cabinet
- Recording: optionally create a copy of the data to be recorded for later recording with any program

Deletion
- Automatically control the life cycle of documents, including document deletion and optionally, database entries

Logging and Monitoring
- Default logging of all changes in system, all runtime changes in documents as well as all workflows
- Specification of changes/activities to log by system administrator, organization administrator, file cabinet owner, according to level
- Case-by-case definition of content of logging entries
- Definition of logging configuration based on access rights
- Option: filter logging information, e.g. entries in a special database field or log the activities of a particular user
- Logging destinations: database, XML file, text file
- Alarm feature: additional output options for critical errors, such as e-mail

Copyright Protection
- Scanned documents in database show as "copyright protected"
- No simultaneous access to copyright protected documents
- Controlled printing of protected documents to individual pages

Security
- Double data retention: additional storage of database entries in document file(s) as XML header file(s)
- Option: encrypt documents and headers by linking to AED and RSA procedures*
- Restore corrupt databases using information stored in XML header files
- Option: encrypted communication, communication between client and server using Windows mechanisms
- Option: server inter-communication via SSL
- Log on using DocuWare or Windows login (Single Sign-On)
- Transactions: system always protects data integrity, document changes and storage transactions, both for index data and for document
- Access to documents only possible via Content Server, no direct user access to document directories
- Access to database only possible via Content Server, setting up database clients or ODBC clients on client-side not necessary
- Option: high security level for file cabinet and users; only users with high security level authorization (no Single Sign-On) can access a file cabinet with a high security level*

System Requirements
Operating Systems
Client and Server Components:
Win 2000 SP4, Win XP Prof. SP1, Win 2003 Server SP1 (DocuWare server components do not require server operating system)
Web Client (INTERNET-SERVER):
All common operating systems and browser models

Hardware
Server: Pentium IV, 512 MB RAM, 1 GB recommended
Client: Pentium IV, 128 MB RAM, 512 MB recommended
Single User / Mobile Workstation: Pentium IV, 256 MB RAM, 512 MB recommended

Storage
External databases supported: MySQL, MS-SQL, Oracle
Storage for document files:
Windows File System, Linux, SUN, Novell and others with Windows file system support

For more information please visit our website at www.docuware.com:
Datasheets
Functions and performance characteristics for all DocuWare optional modules
White paper
Technical information of conception and architecture
SolutionInfo
DocuWare solutions for range of applications
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