DocuWare

From Documents to Value

DocuWare

ProductInfo

Professional Enterprise Content Management

DocuWare is state-of-the-art document management system software for professional Enterprise Content Management. By tapping into the valuable information contained in documents, precisely where and when you need it, you can streamline your business practices.

DocuWare automatically files documents based on your criteria, regardless of their source or format. This means that both paper and electronic documents such as correspondence, records, email, CAD, spool files and more can be stored, shared and managed, simply and securely, from a centralized document pool.

DocuWare meets all requirements for integration into an existing IT environment, and supports the standards and procedures found in office and enterprise-wide systems.

Additional records management features ensure that access to documents is secure, controlled and logged at all times. With enhanced workflow functionalities, web access, and universal integration features, DocuWare provides all the tools you need for efficient Enterprise Content Management.

DocuWare - Highlights

- User-friendly interface
- Simple administration
- Rapid integration
- Absolute data security
- Flexible scalability
- Security for the future

Power users appreciate the scope of functionality, administrators the affordability and ease of use.

1. Import documents

The basic principle of DocuWare is based on the normal office environment and its established procedures. Documents initially arrive in electronic baskets that mimic the in-box on your desk, and you work with them as you normally would--sort documents in your basket, staple or clip them together, or add notes, comments, signatures and stamps.

From the baskets the documents are stored in digital file cabinets, forming the document pool. You can decide how many file cabinets you'd like, or how they are organized, whatever makes sense for your company. DocuWare's powerful indexing features make sure all document types are filed away in the right place.

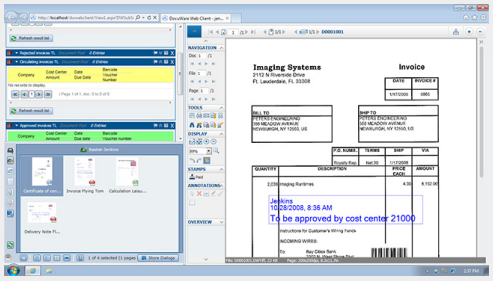
Paper documents

Letters, invoices, reports, drawings, notes and other printed or handwritten documents can be imported using almost any type of scanner. DocuWare integrates a wide range of convenient control features from simple workstation devices to high-performance scanners. Similarly, network scanners and multifunction copiers can be integrated directly in the DocuWare system without the need for additional software.

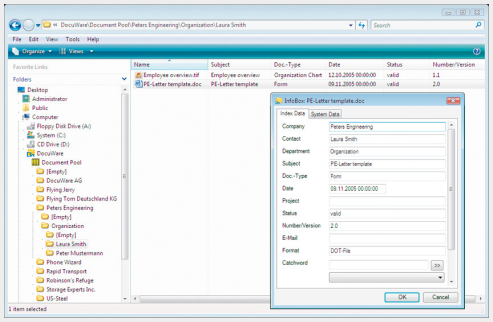
Once scanned, documents are held in the DocuWare baskets for further processing or for storing in the file cabinets. One option uses an add-on module to extract data directly from documents by OCR (text recognition) or barcode recognition during the scanning process. Then, using this extracted data, the documents are automatically categorized, indexed and stored in a file cabinet.*

Solution oriented: Work productively with the valuable contents of your documents through improved efficiencies, regardless of volume.

Work directly from your browser



DocuWare Web Client supplies all the tools needed to use documents productively, directly from your browser.



Windows Explorer Client provides the familiar options of Windows file management to access DocuWare file cabinets. They appear as separate folders within the Microsoft file system. Drag and drop files into file cabinet directories from here or store them in a file cabinet folder from any application using the "Save As" command.

MS Office, CAD, and more

DocuWare offers several ways to import files. Drag and drop them into DocuWare baskets or use the Import menu. DocuWare can monitor any folder in the file system to automatically import large volumes of files into baskets or file cabinets.

Mass documents and legacy data

DocuWare can be integrated into any business solution by means of universal functions and interfaces. Documents created in-house such as invoices, reports, and other lists are archived by DocuWare automatically. DocuWare imports the Windows

The DocuWare Client is available in a browser for storing and processing documents. DocuWare also offers an alternative, convenient method of working through direct integration in Windows Explorer. With the Windows Explorer Client, a DocuWare folder appears within the Microsoft file system. This folder contains the file cabinets. Documents or even entire Explorer directories can be stored from within Windows Explorer using drag and drop, with each file being indexed automatically, or store documents directly from any Windows application with the "Save As" command.

File information such as file size, extension, or the last change date can be used for categorization and indexing. You can choose to store files automatically or manually with supplemental information. Or, you can easily add custom storage features with the DocuWare Software Developer Kit (SDK).

DocuWare imports files in their original format, and displays them either with the integrated DocuWare universal viewer or with the original application program that created them.

File while you print

Choose DocuWare Printer from any application's print dialog box, and an exact replica of the document is generated from the print data stream and stored in the DocuWare file cabinet as the document is printed. In the case of documents that follow a standard format, such as outgoing invoices, proposals, quotes or reports, index words are extracted directly from the document and stored with the documents automatically.

operating system's print data stream using the standard feature, DocuWare Printer. The print data is stored as individual documents, categorized, indexed and stored in the file cabinet. Optionally, DocuWare can also overlay forms and letterheads. This allows the ability, if needed, to combine print data into exact replicas of the original document.

Legacy data, or data that must be retained for legal reasons, can be 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 along with the original file name.

Email

The documentation of business processes also includes email. DocuWare can import and store email from Microsoft Outlook, Exchange, and IMAP email providers such as Gmail,* either automatically or with confirmation or correction by the user. Email can be organized in combination with other kinds of documents on the same subject and by the same criteria. DocuWare uses the sender, recipient, date, subject and other mail information for automatic indexing, and even pulls company and personal information from address books and other databases.

2. Organized and secure storage

DocuWare groups documents, regardless of origin, in a central document pool--the file cabinets--on the basis of user-defined standard criteria. This applies to business documents (whether scanned or created in your own data processing system), correspondence, drawings, and images, as well as email and Microsoft Office files.

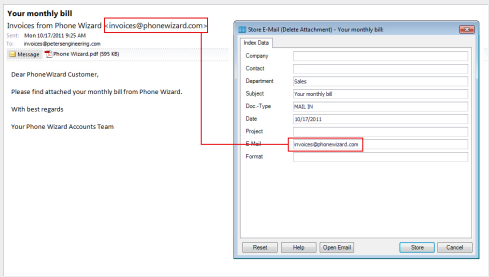
Open standards for documents and index data

Document files are saved either in their original format or as PDF/A files. A "metafile" in XML format is saved for each document file. This is used to record information about the document and its contents, and contains markups, electronic stamps, and signatures along with a duplicate of the document's categorization and index data. The main storage location for index data is a relational database linked to the document files, ensuring that all documents can be retrieved easily and enriched with a full text index if required.

Automatic Filing

DocuWare offers various methods of automatically and semi-automatically integrating index data from external sources such as text files, databases, and address books, to ensure proper and correct indexing. Some of these options are standard features while others require add-on modules. The DocuWare Import module* works in the background and monitors folders and directories for files, while the Intelligent Indexing Service* takes it one step further and automatically learns from what you have done and applies this learning to the next documents with the same format. The CONNECT to Outlook and CONNECT to Mail modules* automatically import and store email in DocuWare. Documents can also be indexed using terms from external databases,* e.g. from ERP or CRM systems.

Save time and resources through automatic classification



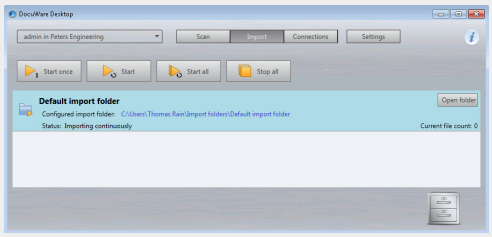
DocuWare automatically imports email information including sender, recipient, date and subject for document indexing.

To make best use of your valuable content, documents must be easily accessible and stored in a future-proof independent structured platform.

Demand-led storage systems

DocuWare file cabinets store documents throughout their life cycle, from the moment they are imported or created, through editing and processing to long-term archiving. All current storage technologies are supported, from hard disks or RAID systems, CD, DVD and BD in manual or Jukebox mode, through 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.

Immediately process incoming files

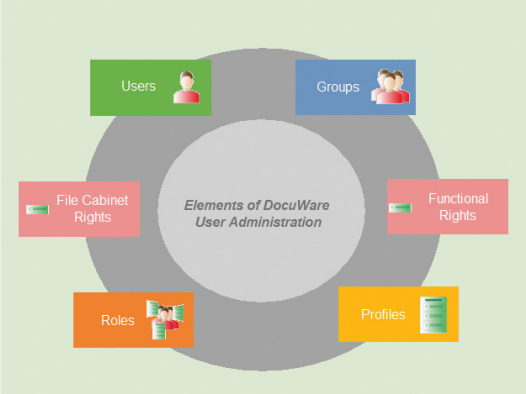


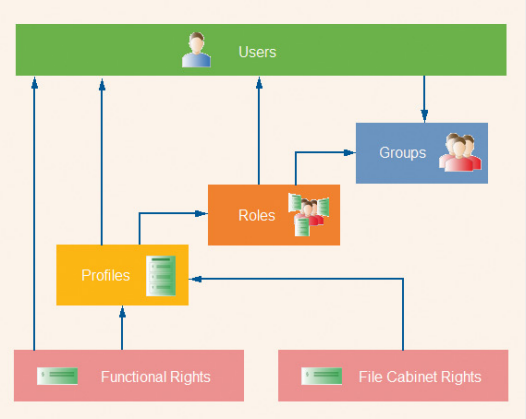
DocuWare Import detects incoming files and archives them automatically, complete with indexing.

Autonomous, system-independent file cabinets

Selected documents or entire file cabinets can be saved on CD/DVD/BD, USB stick or external hard disk. Project-related data such as catalogs, lists and technical drawings can all be easily stored. A separate retrieval module is automatically provided so that users without a DocuWare Client can still search and display the documents they need. Autonomous file cabinets are ideal for long-term archiving and backup. The contents are accessible regardless of the system.

Ensure confidentiality with sensible rights assignment





DocuWare's sophisticated and customized rights assignment makes it possible to ensure that confidentiality is preserved at all times and that responsibilities can be mapped within the system.

3. Records management: Controlled storage and access

DocuWare has security mechanisms for internal control and meeting audit requirements. These mechanisms protect documents throughout the entire workflow from import to long-term archiving on read-only media and storage systems. DocuWare assists compliance with legal and regulatory standards including AO, HIPAA, Basel II and Sarbanes-Oxley. Retention and deletion periods are monitored automatically.

Security creates confidence: DocuWare provides the highest security against data loss, unauthorized access, and system crashes.

Legally compliant document and data access

DocuWare ensures data needed for legal reasons can be accessed throughout the entire statutory retention period by means of export functions. Spool data in the printer system that was automatically imported via DocuWare Printer can be reproduced as an exact replica in the original format by storing form templates.

Tailor-made access rights

Access to documents is strictly controlled through a detailed authorization concept consisting of groups, roles and profiles. This ensures that employees, auditors, customers and suppliers will only see the documents they are allowed to see. Direct access to document files from the operating system file browser is not possible. Log features make it possible to show who accessed or modified a document and when, even years later.

Electronic Signature

Signatures and time stamps are seamlessly integrated in the DocuWare system and available to authorized users. They provide an additional way of ensuring the integrity and authenticity of documents.

4. Find documents

The success of a document management system depends on how quickly you find the information you are looking for. DocuWare makes the search both simple and convenient: search terms can be entered in full, in part, in combination, or selected from lists. Categorized and full text searches can be combined. Whichever method you use, the results are returned in a matter of seconds in a list that can be sorted as you wish. Thanks to the DocuWare universal viewer, it is not necessary to have the original application installed on the computer to read the documents in the result list.

Productivity enhanced with the integration of a search button in your familiar business applications.

Full text searches

DocuWare's powerful full text retrieval feature can be combined with all supported database systems. This feature extracts text from any scanned document, and from most file formats. The full text search also allows truncation and multiple search words. Occurrences of the text are highlighted in the DocuWare Viewer in color.

Task-specific search and storage profiles

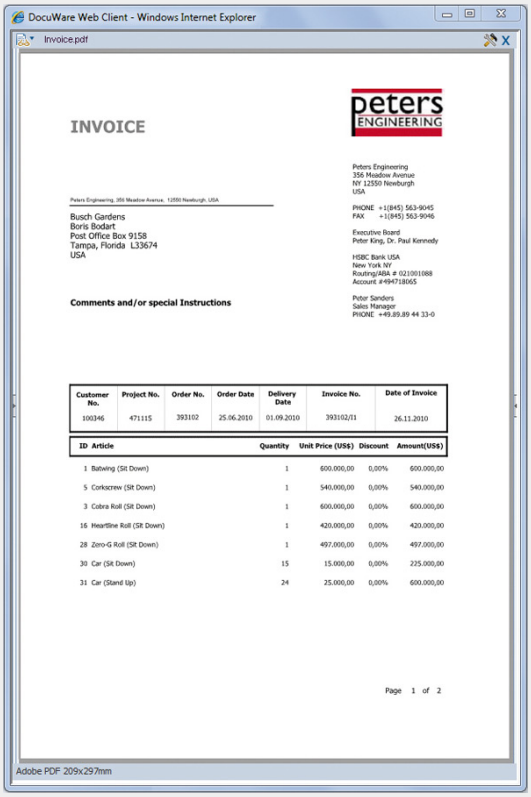
Administrators can define different search and store dialogs and result lists centrally for the same file cabinet. The fields that are available for input and preset with default values are defined by the dialog. The different dialogs can be assigned to individual users or roles. Users work either with a dialog that they need for their own specific tasks, or they can choose the dialog they need for a particular file cabinet from a list in the main window. This makes it easier and more efficient to access documents such as contracts or reports that need to be accessed regularly. Documents that belong together can be linked so that when a particular document is retrieved, the corresponding information is also available at a glance.

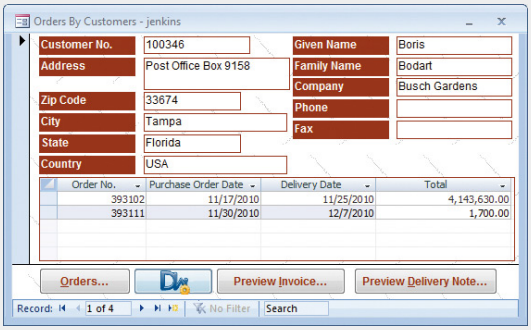
Easy integration: Work with other programs

To make workflows as easy to design as possible, documents can be accessed and displayed directly from other applications. The Smart Connect* module can capture search and index terms directly from most applications at the touch of a button. You can retrieve the documents belonging to a particular process while never leaving your standard applications. Configuration is flexible, so that it can be done not just by administrators but also by the users themselves.

For direct integration into an application, there is a Software Developer Kit (SDK) for C, COM, Java, Web Service and .NET interfaces, as well as browser integration and a proprietary SAP interface.* Other specific interfaces to ERP solutions are supplied by partner companies (www.docuware.com).

Smart Connect: retrieve with one click





Use the Smart Connect button to retrieve documents with one click.

5. Edit documents

When working with "live documents," files that are regularly edited and updated, DocuWare offers some extensive editing options.

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 is done 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 auditing and tracking purposes.

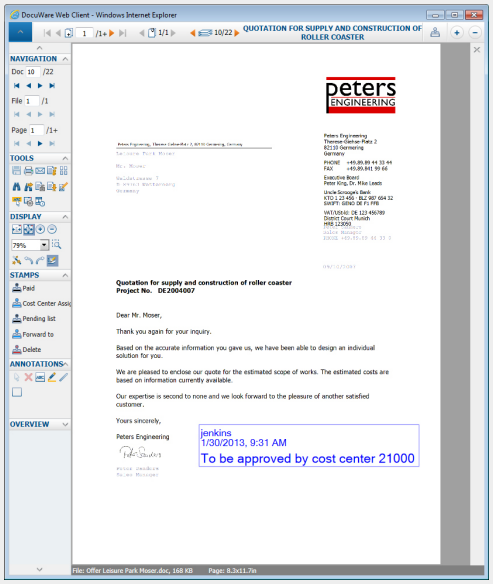
Markup, commenting and stamps

The DocuWare universal viewer provides some powerful tools for editing documents. Text notes and comments, text marker highlights and stamps can be applied to almost any document format. The documents themselves remain unchanged. All elements are printed as an overlay and stored separately. Stamps can be used to lock and release documents and also for integrating electronic signatures. Handwritten comments and signatures are easily entered and integrated on compatible devices using the pen feature.

Work with email

Email archived with DocuWare is automatically marked as email. This means they can be answered or forwarded directly from the DocuWare Web Client using the local email application (e.g. Outlook).

Work with your familiar desktop tools



The methods are comfortably familiar: add notes, comments, signatures and stamps to documents in the usual way. History and editing status can be seen at a glance. The document itself remains unchanged.

6. Workflow

DocuWare helps to automate document-based business processes. It ensures that documents always reach the right person, and the use of integrated stamps and optional task lists* makes configuring processes very easy. This makes it possible to include employees and outsiders in workflow processes over the Internet while keeping all of the security mechanisms of the DocuWare system in place.

Controlling with stamps

Workflows can be controlled by means of simple approval and refusal stamps or via forms that are linked to stamps. Placing a particular stamp on a document or entering values in a stamp can determine the next step of the workflow. As an example, it can define who the document should be sent to next. The use of stamps mimics paper processing and makes the application easier for users to understand. There are also ways to allow external programs to influence individual workflow steps.

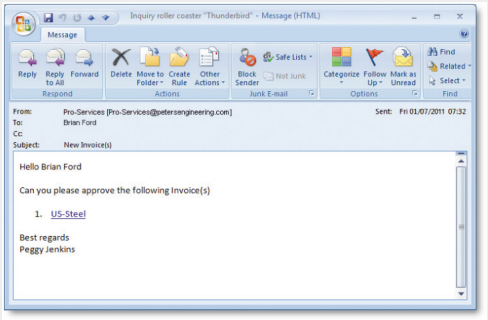
The Task Manager* module makes it possible for users to be notified by email when they have new tasks, for instance if a document is added to their inbox that needs their approval. This generally speeds up processes and, above all, keeps remote or mobile users informed when new tasks arrive.

The Workflow Manager* module provides a powerful graphical workflow designer that allows complex document-based workflows with substitution and escalation management. This ensures that workflows proceed to completion, regardless whether a particular person is present. Changes are tracked in the workflow history.

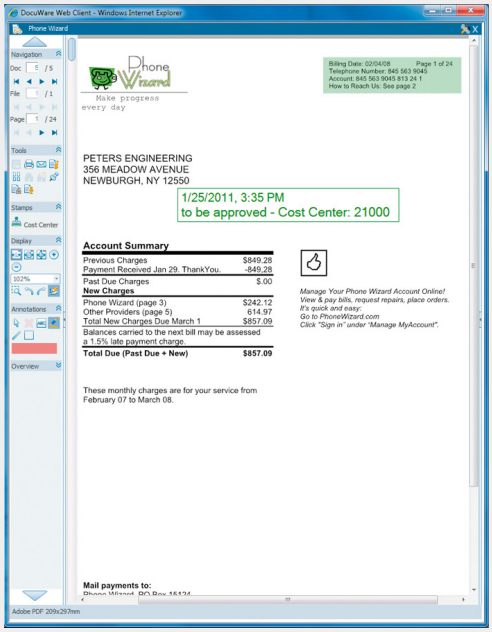
Maximum transparency

The main characteristic of DocuWare workflows is transparency. By using a stamp, the date and user name are automatically placed on the document, creating a visible audit trail (just as with paper). This can be understood even by someone unfamiliar with the workflow process. Depending on your internal guidelines, you can choose to either show or hide stamps and other notes on screen and on the printout.

Email notification keeps processes moving forward



Notification by email that documents are waiting to be processed makes for fast, efficient processes, even when the person responsible is out of the office.



Stamps are a tried and true method of marking work steps and controlling processes, for example, in approval procedures.

7. Remote locations and mobile users

One of the important benefits of electronic document management by DocuWare is being able to access documents online regardless of location. DocuWare can access file cabinets and documents in the central document pool via the Internet with the full range of functions. This makes it easier to include mobile workers with smartphones or tablets without impairing DocuWare's high security standards.

Synchronize file cabinets

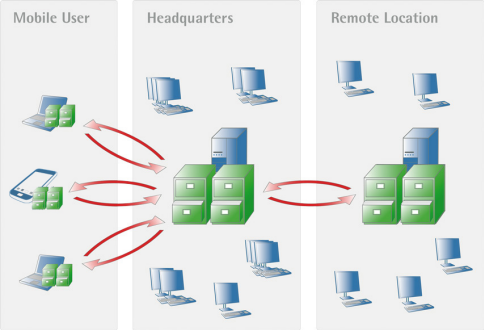
File cabinets at different locations can also be synchronized with one another. A detailed system of rules determines which documents in a file cabinet in the central document pool are synchronized with the file cabinet at a branch location in the nightly synchronization run, and vice versa. This ensures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

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 in the electronic process, making the system more efficient compared to paper-based workflows. The optional email notification* of new tasks accelerates workflows across remote locations and mobile users.

Access, view, and edit documents from the road.

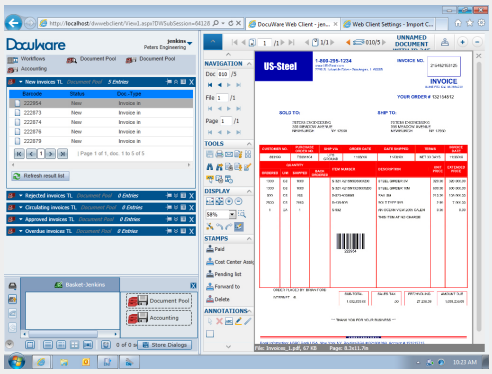
Information synchronized at all locations



8. Worldwide document management

DocuWare's Web Client ensures access to documents from anywhere in the world, at any time, using common web browsers. Workflows and functions can be easily adapted to the needs of different organizations and to different bandwidths.

Flexible access on the web



With DocuWare Web Client documents can be accessed and processed via the web with the same flexibility and the same level of security as within closed company systems - all with a normal web browser.

Flexible integration and security on the web

The two main features of DocuWare's web architecture are its extreme ease of integration and high security. In DocuWare Administration it is easy to set up any number of Web Client configurations and assign them via a unique URL. This allows documents to be encrypted securely before being made accessible to individual people. It also allows rights and access levels to be assigned individually and related to particular tasks. Logins are implemented securely, e.g. through automatic logins (Single Sign-On). You can immediately see whether a document has been manipulated through Checksum control.

Information pool for employees, customers and partners

The flexibility and integration capability of DocuWare's web architecture makes it extremely easy to provide user-specific information over the Internet. Customers can call up their own documents such as invoices and delivery notes. Employees can access their documents when traveling or from home. This enhances customer service and increases productivity without compromising high security standards.

9. Configuration

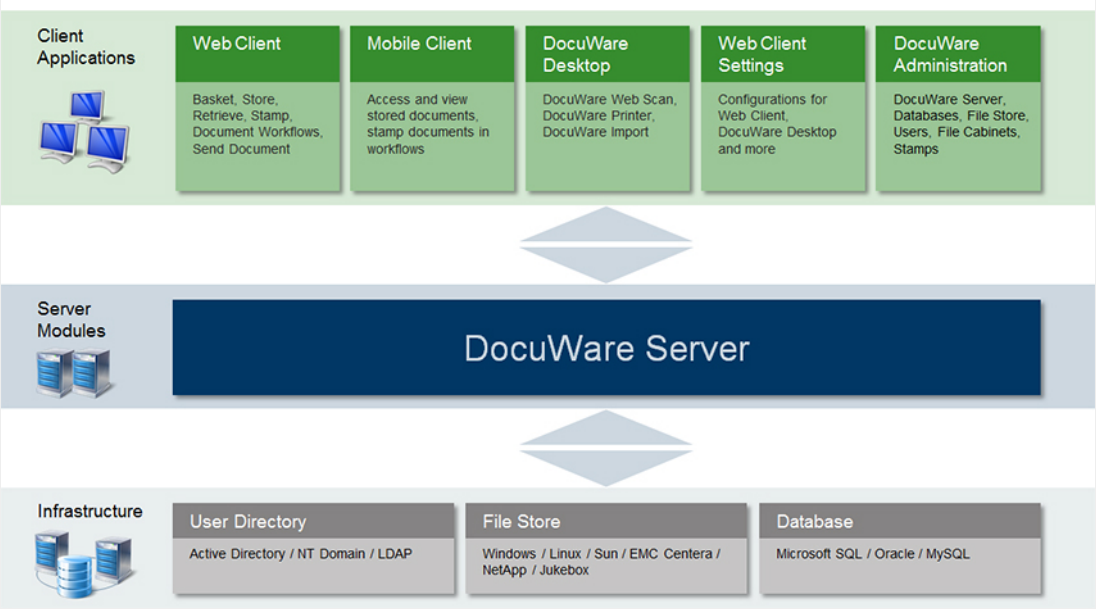
DocuWare has always been known for the simplicity of its installation and system administration. Although the number of features has multiplied compared to earlier versions, these attributes continue to hold true with each new update. Simplicity is the only way to ensure that people actually use the many features of document management.

Simplicity means that people can use functionalities in an easy and productive way. Administrators value the easy configuration and management of the whole system.

Future-proof architecture

DocuWare has a multi-tier architecture that distinguishes between the client, server and infrastructure components. Communication between components and with the surrounding IT environment is done using established standard protocols and interfaces. The Web Client, based on modern, low-maintenance browser technology, and the special client programs access the DocuWare server modules via http/https. For their part, these communicate directly with the storage systems, databases, and user directories creating the conditions for a system that has maximum security while being easily scalable.

The DocuWare system architecture



The DocuWare system architecture offers flexible ways to integrate into existing IT infrastructures.

Central administration suite

The entire configuration, from server availability to user administration, file cabinet administration to setting up workflows, is executed from the central DocuWare Administration or Web Administration. Server modules and users at remote locations are also managed from there. Extensive reporting tools make it possible to create exact system documentation and even make complex installations and configurations transparent. With the ENTERPRISE Server version you can also set up and manage several organizations for different customers within the same system, especially used for running multiple tenants in data centers.

Successful use guaranteed: There are multiple ways you can integrate and customize DocuWare according to your specific needs.

Scalability

If you have a large number of users, you can distribute the DocuWare server modules over several servers. Spreading the load in this way ensures the best performance on all workstations. DocuWare does this by always using the same components and features, whether on single workstations or for distributed group solutions. As a result, the administration remains simple and transparent and no further training is necessary, even when the system is expanded to include new departments and locations.

Security

DocuWare's basic architecture provides a high degree of security against unauthorized data access. The identification of single users via both the DocuWare login and at single sign-on, with automatic Windows authentication, offers the highest degree of security. Access rights can be assigned to roles and groups down to the single document level. If using the ENTERPRISE Server version, there are additional security functions available 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 provides optimum protection 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 a database. Depending on the implementation scenario, document files are backed up using normal backup tools or duplicated with DocuWare's own tools, providing for the necessary redundancy.

Add-on modules

A document management system such as DocuWare, must be capable of integration in an existing IT environment. With DocuWare there is optimal data and document exchange with third-party systems, side by side with minimum administration. The basis for this integration in specific user environments is the numerous optional expansion modules over and above the many features and interfaces that DocuWare provides as standard. These modules make it possible to customize the system to almost any individual requirement. An overview of add-on modules together with detailed data sheets on each module is available at www.docuware.com.

** For precise details of the features available in individual DocuWare modules, see our Products section at www.docuware.com.*

Licensing

DocuWare is available in three server versions:

1. DocuWare BUSINESS Server is an entry-level solution for small organizations with one server, operating one production site and with no requirement for add-on modules or larger file cabinets. Add-on modules are not available.

2. DocuWare PROFESSIONAL Server is a flexible solution for medium-sized organizations and provides one end-user organization per DocuWare system, unlimited file cabinet size and synchronization of file cabinets at different production sites (additional server license required for each one).

3. DocuWare ENTERPRISE Server is a scalable solution for large organizations, supports an unlimited number of organizations within the same DocuWare system, and offers load balancing, clustering, encryption of document data and connection to external storage solutions.

Client licenses for users in a system can be purchased in the Concurrent model (i.e. licensing the number of users logged into the system simultaneously) or the Named model (i.e. licensing the number of computers connected to the system). One Concurrent license can be converted into two Named licenses.

The current license terms can be obtained from your Authorized DocuWare reseller. Find a listing of local resellers at www.docuware.com.

This document can also be found here: **http://pub.docuware.com/en/docuware?company=6565**

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