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# **New in DocuWare 5.1c**

**Using DocuWare**

**Installing DocuWare**

**DocuWare System**

**Managing DocuWare**

2011

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# New in DocuWare 5.1c

## 1 Using DocuWare

### 1.1 Web Client

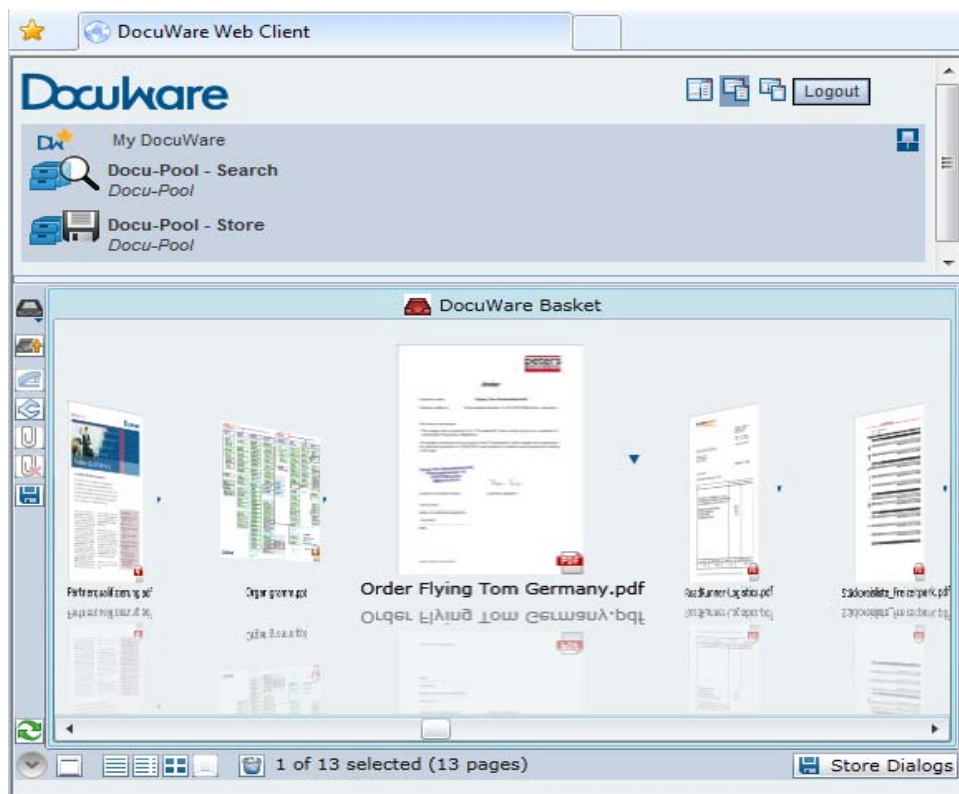
#### 1.1.1 Baskets in Web Client

Baskets complete DocuWare Web Client; from the user's perspective they correspond to the baskets on the DocuWare Windows client or even baskets on your desktop.

Baskets are the place you'll find the documents that are waiting to be processed. These can be documents that are still to be archived, or even copies of documents that have already been archived. From the basket on Web Client you can also display documents in the Viewer, attach stamps or annotations, open and edit them in an editor, print them and download them. You can also combine several documents together there. You can store documents from the basket directly in a DocuWare file cabinet or pre-index them to prepare them for archiving.

The basket in Web Client provides various views for the documents it contains: a simple list, a detailed list, a thumbnail view and a cover-flow view. A separate thumbnail server provides a quick view of thumbnails and the cover-flow view.

Technically, the baskets in Web Client have a similar structure to file cabinets, as their data is stored in the area of DocuWare server components. This allows you to access your new baskets from any location; a Windows PC with a web browser and Internet access is all you need.



*Basket in Web Client, documents in the cover-flow view*

The standard file format for scanned documents in the new baskets is now PDF. When you copy documents scanned or generated with DocuWare as TIFF, JPEG or PNG into a Web Client basket they are automatically converted to PDF and also stored in the file cabinet in this format. The user doesn't notice anything as all functions that were available for the previous formats are now also available in Web Client for PDF format. Documents archived in previous formats can continue to be

used without restrictions. By focusing on PDF, DocuWare is on the one hand following the wishes of users and on the other enabling new, better and more secure functions for document exchange in future.

















## Use






- Scanning documents in the basket (together with Upload Service, page 6)
- Sorting documents into different baskets
- Adding annotations to documents before archiving
- Stamping a document before archiving, which also allows the index words to be added
- Stapling several documents (PDF format) scanned or generated in DocuWare into one document (i.e. into one PDF file), splitting (unstapling) multiple-page documents into single-page documents.
- Clipping together related documents from different sources (scan, e-mail, Word file, etc.) with a view to archiving them as one document
- Creating a new version of a document that has already been archived and then processing it

## Your benefits





- Familiar workflows - be they paper-based or from DocuWare Windows Client - can be retained in Web Client. This leads to a high level of acceptance and rapid familiarization.
- Complements Web Client

## Features in detail

-  Upload documents to the basket from the file system
-  Staple documents: combines several documents scanned or created with DocuWare (PDF format) into one PDF document, i.e. create one PDF file out of several PDF files.
-  Unstaple documents: splits a multiple-page PDF document into several one-page PDF documents, i.e. creates several PDF files out of one PDF file.
-  Clip documents: Combines several documents, even with different file formats, into one document with an "electronic paper clip." This method preserves the individual files.
-  Unclip document: Splits a clipped document back into the original number of separate documents. The individual files are once again treated as individual documents.
-  Display documents in Viewer: There you can add annotations and stamps to documents.
-  Display documents in separate Viewer windows
-  Open and edit documents in the editor
-  Open document in a plug-in
-  Send documents by e-mail: A new e-mail is created in the mail client with the document as attachment, in its original format, as PDF with annotations, as PDF without annotations, or in DocuWare format.
-  Print documents, with or without annotations
-  Rename documents
-  Pre-index document: You assign index words to the document in the store dialog, but without archiving the document.
-  Archive documents manually via the indexing store dialog
  - Keep entries when manually archiving multiple documents: Index words you assigned for the first document to be archived are used for subsequent documents.
  - Option whether or not to delete the document from the basket when archived manually.
-  Store documents automatically: Selected documents are archived without opening a store dialog, index words already assigned are applied.
-  Copy documents from a basket in Web Client into another

-  Move documents from a basket in Web Client into another
-  Download documents
-  Delete documents: Documents are initially moved to the trash can
-  Delete documents permanently
-  Open info dialog on a document

### **Document views available in the basket:**

-  List
-  Detailed list
-  Thumbnail
-  Cover-flow

### **Using Baskets**

The baskets are positioned centrally in Web Client. Any new baskets assigned to you are opened automatically. Using Favorites management in the *My DocuWare* dialog, you can define which of the baskets assigned to you are opened and which should be closed.

Baskets for Web Client are created in the Web Client settings (see page 22) and assigned to users. Individual baskets can also be made accessible to several users.

## **1.1.2 Upload Service**

The Upload Service automatically loads documents into a basket in Web Client at defined intervals, either from a DocuWare 5 basket on the Windows client or from any selectable folder in the file system. Index words, annotations and stamps that may be attached to the documents are also included.

TIFF, JPEG and PNG files created with DocuWare are automatically converted to PDF format.


### **Use**

- You scan documents into a DocuWare 5 basket on the Windows client and then upload them to a basket in Web Client using the Upload Service. The scanned documents are then available for further processing in Web Client.
- You scan documents using an external scan program into a folder in the file system. The Upload Service retrieves the scanned documents from there and places them in the basket in Web Client. Since the Upload Service works in the background, it appears to the user that they are scanning directly into the basket in Web Client.
- ACTIVE IMPORT transfers documents that have been digitized with a network scanner into a DocuWare 5 basket on the Windows client and assigns the documents initial index words, e.g. a barcode value read with RECOGNITION. The Upload Service transfers these documents including the index words into a basket in Web Client. There the documents can still be stamped for example before being archived.

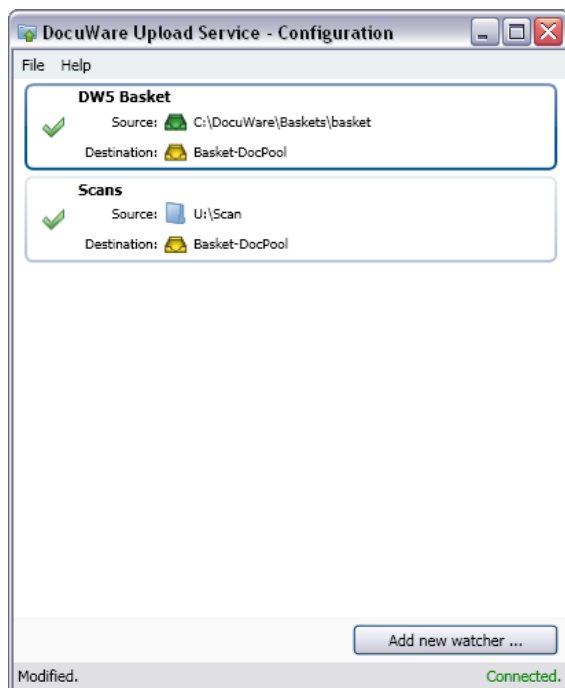
### **Your benefits**

- Automatic transfer of scanned documents including index entries to baskets in Web Client
- Smooth interaction between Windows client and Web Client
- Automatic conversion of documents to PDF format (default format in Web Client basket)

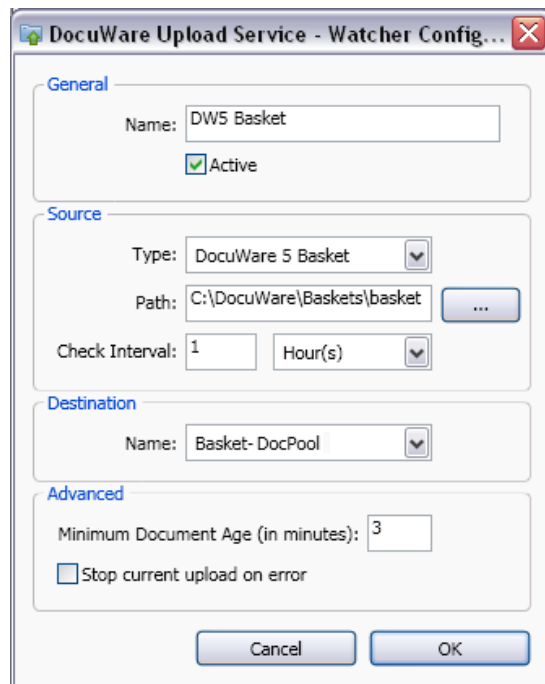
### **Using the option**

Use the  tray icon to open the user interface for the Upload Service. From there you can set up upload jobs. The upload itself is done automatically at time intervals defined by you.

You can install the Upload Service either as a client component using the DocuWare setup or from Web Client in the *My DocuWare* dialog > *Start* tab > *Install desktop applications*.



Overview of individual upload jobs



Settings for an upload job

### 1.1.3 Edit documents

You can now open a document archived from Web Client and edit it in an editor. The document is downloaded to the local client and opened for editing. The document is uploaded again when you save it. This replaces the original document with the updated one.

While a user has a document open for editing, it can only be opened by other users in read mode.

#### Use

- You want to change a document that has already been archived, for example to correct some errors. With the new edit function you can make the changes directly in the archived document, which means that no second version of the document is created.
- A document that needs to be worked on by several users at different times is archived right at the beginning. To modify the document, the user opens the document in an editor directly from the file cabinet. Once he has finished and saves, the updated document is automatically available to other users in the file cabinet. With this method, the document is safely overwritten in the file cabinet right from the start, thus avoiding a plethora of different versions on the computers of different users.


#### Your benefits

- No need to download and upload an archived document that you wish to edit
- This familiar feature from the Windows client is now also contained in Web Client




#### Using the option

Via the context menu of an entry in the result list; or via a button in the result list, if the result list is configured for this.

### 1.1.4 Reply to and forward archived e-mails

E-mails archived from DocuWare 5.1c with ACTIVE IMPORT or CONNECT to Notes are now marked as e-mails in the file cabinet. You can identify e-mails in the result list in Web Client immediately by the  icon. You can answer archived e-mails directly from the result list or from the Viewer. You can also forward them from here. In both cases, the local mail client opens.

Mails are compiled in the same way as in normal mail applications:

-  *Reply*: The mail contains the original mail text, but not attachments. The sender of the original mail is entered as the recipient.
-  *Reply to All*: The mail contains the original mail text, but not attachments. The sender and all other recipients of the original mail are entered as recipients.
-  *Forward*: The mail contains the original mail text and any attachments. No one is entered as recipient.

For a new mail generated using the *Reply/Forward* functions, there is therefore no difference whether it is sent directly from the mail client or from DocuWare Web Client.

#### **Your benefits**

- Work intuitively with e-mails in DocuWare
- Archived e-mails can be re-used in DocuWare in the same way as in Mail clients. This increases acceptance of mail archiving, thus relieving the burden on mail clients.

#### **Using the option**

- In the result list or task lists or in the basket: Via the context menu of an e-mail document: *E-Mail > Reply / Reply to All / Forward*
- In the Viewer: Via the e-mail icon on the toolbar: *Reply / Reply to All / Forward*

### 1.1.5 Annotations and stamps possible in documents of any file format

You can now add annotations and stamps to all pages (not just the first page) of documents in any file format in the Web Client Viewer. This function is not supported by the DocuWare Windows client. There you can open PDF documents and documents in external formats with annotations/stamps on subsequent pages in read-only mode, but the annotations/stamps on the subsequent pages will not be displayed in the Windows Client Viewer.

#### **Use**

- Add stamps or annotations to all pages of all documents residing in your system or which you create by scanning.

#### **Your benefits**

- Better commenting and stamping options in all file formats.

#### **Using the option**

Via the navigation within the document and the annotation tools or stamps.

### 1.1.6 Send multiple documents from a result list in an e-mail

You can now send multiple archived documents together in the same e-mail. Simply select the documents in the result list and then choose the *e-mail* context menu entry.

#### Use

- You want to forward a number of archived documents about a process to one of your partners. You run a search in the file cabinet to retrieve the documents. You select the documents you need in the result list and send them to your partner all together in one e-mail.

#### Your benefits

- Clearer working, as related documents can be sent together in one e-mail.
- Faster working, as it avoids laboriously sending individual documents in separate e-mails.

#### Using the option

Select several documents in a result list, then select *e-mail* context menu entry.

### 1.1.7 Download or print multiple documents from a result list at once

You can now download or print several archived documents at once. Simply select the documents in the result list and then choose the *Download* or *Print* context menu entry.

#### Use

- You want to print out a number of archived documents for an event. You run a search in the file cabinet to retrieve the documents. Select the documents you need in the result list and then start the print routine for all selected documents at once from the context menu. This saves you having to open the print window for each individual document and running the print job separately each time.
- You can use the same procedure when you want to download multiple archived documents.

#### Your benefits

- Faster working, as the print jobs or downloads of the different documents do not have to be initiated individually.

#### Using the option

Select several documents in a result list, then select the *Download* or *Print* context menu entry.

### 1.1.8 Print documents with or without annotations

When you print a document, you can chose whether the annotations and stamps should also be printed on the document or not.

If you do not wish to print the annotations, you need the *Hide graphical elements* file cabinet right.

#### Use

- A document includes annotations or stamps that are only intended for internal use. If you want to send the document to an external partner, simply print the document without the annotations.

#### Your benefits

- More flexibility when working with annotations
- This feature familiar from the Windows client is now also available in Web Client

### Using the option

- In result or task lists: Via the context menu of a document: *Print > With annotations / Without annotations*
- In the Viewer: Via the Print icon on the toolbar: *With annotations / Without annotations*

#### 1.1.9 Open document in additional Viewer window

To help you compare different documents more easily, you can open them side by side in different Viewer windows. Previously in Web Client this was a setting in the result list and therefore affected all documents in the result list. Now you can choose when displaying a document whether to display it in an additional Viewer window or not, both for documents in result lists and for documents in baskets.


#### Use

- You want to compare the invoice for an order with the associated quotation. You open one document in the "normal" Viewer window in Web Client, and the other document in a separate Viewer window. For optimum comparison, place the Viewer windows side by side. It doesn't matter to the application where in Web Client the documents are opened from: from one or different result lists, from a result or task list, from a result list and basket, or from different baskets.

#### Your benefits

- Work conveniently and efficiently in Web Client.

### Using the option

In the result list or task lists or in the basket: Via the context menu of a document:  *Display in sep. Viewer.*

#### 1.1.10 Forgotten your password? - sending an automatically generated password

If you use the DocuWare login to log into DocuWare Web Client and you have forgotten your password, you can now get a new, automatically generated password sent to you by e-mail via a link in the login dialog. You can use this to log on to Web Client and set up a new personal password (*My DocuWare* dialog > *Change Password* tab).

The conditions for this procedure are:

- You know your DocuWare user name.
- A valid e-mail address is entered in your user account in DocuWare Administration.
- A connection to the mail server is assigned to the Web instance being used for Web Client.

#### Use

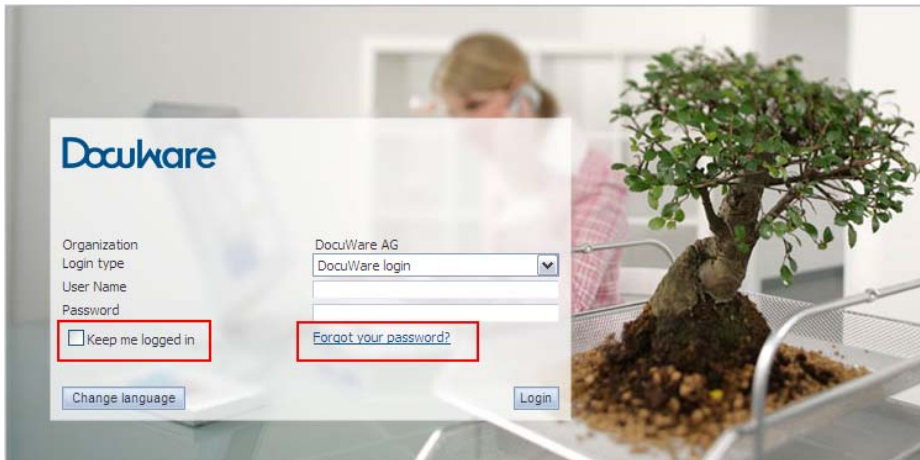
- You have forgotten your DocuWare password. Thanks to this feature you can still log on to Web Client with your DocuWare login without the help of a DocuWare administrator.

#### Your benefits

- Secure access to DocuWare is guaranteed even if you forget your DocuWare password.
- You do not need the administrator to reset your DocuWare password.

### Using the option

In the Login dialog in Web Client



*New options in the Web Client Login dialog*

#### 1.1.11 Automatic login with saved user credentials

From this version, users will be able to save their user credentials on the Login page to the Web Client. The next time they call up Web Client, they will be logged in automatically in the background using the data stored in a cookie.

If necessary, the administrator can disable this option in the setting of the Web instance used.

#### Use

- If Web Client is called by another application there is no need for the user to log on to Web Client first, as they can view the retrieved document directly in the Web Client Viewer. Previously this was only possible if a Single-Sign-On was being used with Windows authentication.

#### Your benefits

- You can now also log on to Web Client automatically with your DocuWare login, removing the need to enter your user ID every time.
- This option can be made available or hidden from the user depending on your security standards

### Using the option

Option for saving user ID: In the Login dialog in the Web Client

Enabling/disabling of option by administrator: in DocuWare Administration in the *General* category of the Web instance used.

#### 1.1.12 Update task lists automatically (only with *Task Manager* or *CONTENT FOLDER* license)

Task lists can be configured so that they are automatically updated at particular time intervals.

#### Use

- To always see all the latest tasks sent to you in the task list, you can keep the task list open all the time. If you set the task list to refresh every five minutes, for example, you will be always up to date.

#### Your benefits

- No need to update task lists manually any more
- You automatically see the documents you need to process

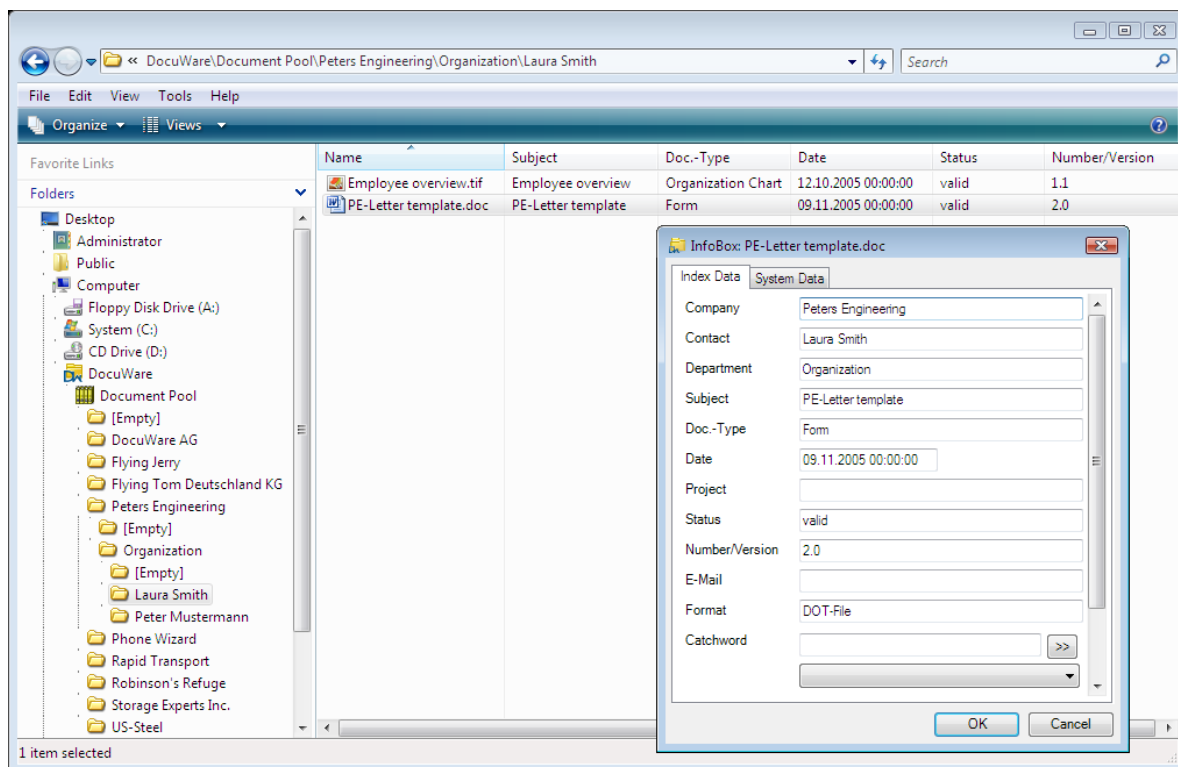
## Using the option

The time interval is set in DocuWare Administration, in the task list settings in the *General* section. No changes are necessary in Web Client itself.

## 1.2 Windows Explorer Client

In Windows Explorer Client DocuWare offers you another alternative for managing your tamper-proof archived documents - direct from Windows Explorer. This intuitive client contains all the main features for easy document management in a familiar interface.

All the main features you are used to in other DocuWare clients are also available in Windows Explorer Client. You can search, view and edit documents directly. New documents can be stored in the file cabinet from the Save dialog of an application. You can import existing documents from the file system either using the familiar Copy/Paste feature, or simply by using drag & drop. Additional index words can be added to documents already archived at any time by opening the info box. Naturally you can re-export or delete documents from a file cabinet, and using the search feature integrated in Windows Explorer since Windows Vista you can now also search in DocuWare file cabinets as well as in the file system.



*Document with index data in Windows Explorer client*

Windows Explorer Client integrates fully into Microsoft Windows Explorer, known and used by all Windows users. After installation Explorer contains an additional folder, which is displayed at the same level as partitions and network drives. From here users can now navigate intuitively through the familiar folder structure. Each folder represents an index word. By copying a document into a folder you automatically assign it the index words of that folder, making the subsequent storage process quick and uncomplicated. By double-clicking on the document or using the context menu, you can open the document to view or edit in the application defined for this.

## Use

Windows Explorer Client includes all the key DocuWare Client functions. The following applications make Windows Explorer Client stand out from the existing DocuWare clients - Windows Client and Web Client.

- Archive documents from different applications directly in DocuWare
- Save links to frequently used archived documents on the desktop
- Import whole folder structures including the documents they contain from the file system into DocuWare while retaining the folder structure

## Your benefits

- Intuitive use and quick introduction to DocuWare: From the user's perspective, very little changes from the familiar file management in Windows
- When you import whole folder structures they remain in DocuWare, with the result that users can carry on as usual, while you benefit from the security of the document management system.
- Economical solution: as an existing customer you can install Windows Explorer Client on as many workstations as you like, without having to purchase an additional license. As for any other DocuWare client, you simply need the appropriate user licenses (Named or Concurrent).

## Features in detail

The features not contained in the previous version are shown here in **bold**.

- **Open archived documents in the Web Client Viewer, add annotations and stamps to documents there**
- Display archived documents (in read-only mode in the application stored in Windows Explorer for that file extension)
- Edit archived documents (in the application stored in Windows Explorer for that file extension)
- Archive documents in DocuWare from an application using Save as: When you select the folder in which the document will be stored, the document is automatically indexed with a number of index terms.
- Retrieve an archived document from an application in read-only mode via *Open*
- Display and change index entries for documents
- Rename folders: Since the folder names reflect the index entries in the archived documents they contain, if you rename a folder, the index entries in all the documents contained in that folder are also changed accordingly.
- Copy archived documents within DocuWare
- Delete archived documents
- Rename archived documents
- Archive individual files from the file system using drag & drop, context menu or shortcut key
- Archive complete folder structures from the file system, without opening the store dialog for individual documents
- Create a link to an archived document (e.g. on the desktop)
- Create a link to a DocuWare folder (e.g. on the desktop)
- Export individual archived documents or even whole folders from the DocuWare folder structure into the file explorer (using drag & drop, context menu or shortcut keys)
- **Archived documents that contain characters in the index word used as the file name that cannot normally be used in Windows Explorer (? ! / etc.) are displayed anyway**
- **Select several archived documents at once in order to open them, move them, etc.**

### Using Windows Explorer Client

Windows Explorer Client is installed together with the DocuWare Client, but it can also be installed on its own, without the DocuWare Client. You can call up the setup for example from Web Client, via *My DocuWare* dialog > *Start* tab > *Install desktop applications*.

You open Windows Explorer Client by clicking on the DocuWare node in Windows Explorer.

For more information on how to install, configure, and use Windows Explorer Client, read the *Windows Explorer Client* manual. You can open the DocuWare homepage from the document pool or via the DocuWare Knowledge Center <http://help.docuware.com/en>.

### 1.3 Smart Connect (Add-on module)

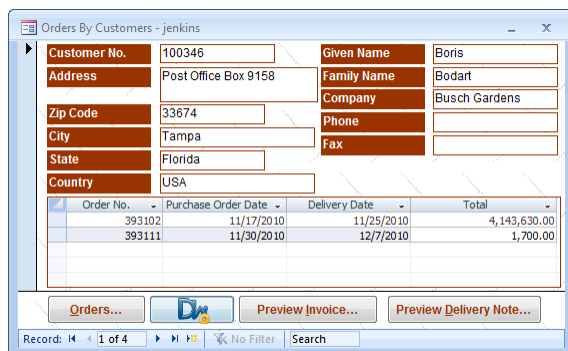
Smart Connect is a new add-on module that connects DocuWare to any external application program. Smart Connect reads words from the user interface of the external application and transfers them to DocuWare Web Client. Here the words are used to search for documents already archived, or even as index words for documents to be archived or already archived.

Smart Connect therefore helps you with searching for documents in DocuWare and with indexing documents, because it saves you having to enter search and/or index terms manually.

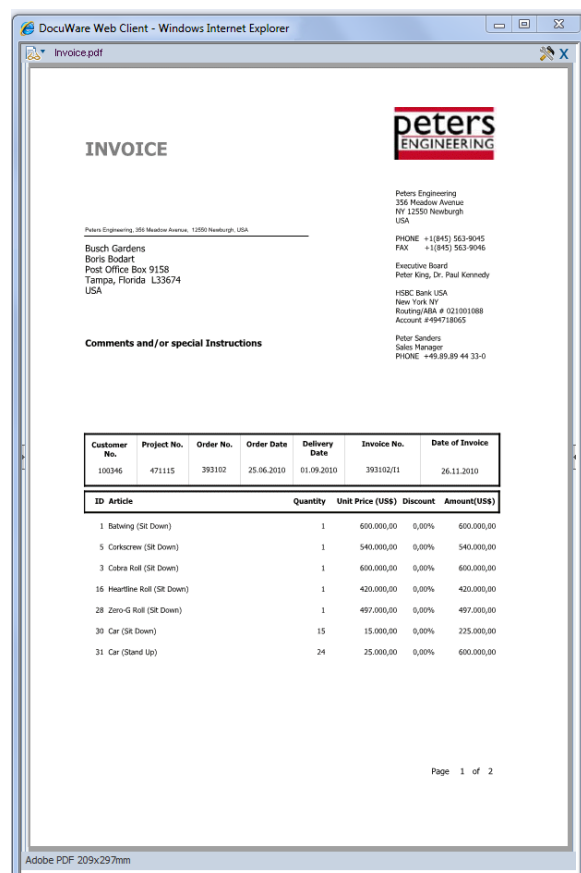
When you use Smart Connect, a previously defined configuration is always run. This Smart Connect configuration specifies for example which content should be read from which applications, and where the extracted content will be used in DocuWare Web Client: as search words in a search dialog (Smart Search) or as index words in a store dialog or info box (Smart Index). Smart Connect configurations are defined in the *Web Client Settings*.

Smart Connect replaces the LINK add-on module.

For more information see the Smart Connect data sheet. You will find this on the DocuWare website under *Products > Add-on Modules > Smart Connect* and in the document pool.



Use the Smart Connect button in the external application to call up the document belonging to the current record from the DocuWare file cabinet.




## Use

- **Smart Search:** You have an accounting software application, which you use to post invoices, and DocuWare, where the invoices are archived. The invoices have the same invoice numbers in both systems. When you now edit the record for an invoice in the accounting software and you want to view the invoice for that record at the same time, you can simply click on a DocuWare button which is integrated in your accounting software. The button runs a background search for the invoice in DocuWare using the invoice number. The retrieved invoice is displayed to you directly as the result.
- **Smart Index:** In this application example too you have an accounting software application, which you use to post invoices, and DocuWare, where the invoices are archived. You start by scanning the incoming invoices so that they are held in a DocuWare basket in Web Client. Entering the invoices in the accounting program and archiving the invoice now take place in parallel: You select the invoices in the basket and choose the file cabinet in which the invoices are to be archived. The first invoice is displayed in the Viewer, and the DocuWare store dialog opens. Parallel to this you have opened your accounting system. There you enter the invoice data, for example the company, date, invoice number, and total. This record is also given a unique number in the accounting system. Now click the Smart Index button in the DocuWare store dialog, import all this data from the accounting system's user interface into the fields in the store dialog. This process assigns index terms in DocuWare at the touch of a button, typing errors from entering the data twice are excluded - and therefore so are inconsistencies between data in the accounting system and index words in DocuWare.

## Your benefits

- Integrate any external applications in DocuWare through easily created configurations. No more complex interface programming.
- Import index and/or search words from an external application into a DocuWare dialog at the touch of a button, no more laborious copying and pasting of individual terms.
- Run searches in DocuWare without having to start DocuWare explicitly first

## Using the add-on module

- **Smart Search:** Via the Smart Search button in the external application, via the  tray icon, or via a previously defined shortcut key
- **Smart Index:** Via the Smart Index button in the store or info dialog
- **Creating configurations:** Centrally in the *Web Client Settings* (see page 22), Smart Connect section. Configurations can be created by the administrator and made available to various DocuWare users, but individual users can also create their own configurations. To create or edit Smart Connect configurations you need the *Manage Smart Connect configurations* right, which is assigned in DocuWare Administration.

## 1.4 All E-mail notifications (only with *Task Manager* license)

An e-mail notification is an e-mail generated automatically by the DocuWare system which is sent whenever a particular event concerning a document archived in DocuWare occurs. Individual e-mail notifications always relate to documents in a DocuWare file cabinet.

You can configure as many e-mail notifications as you like in the *Web Client Settings*.

## Use

- A cost center manager is automatically informed by mail that an invoice he needs to approve is available in DocuWare. The e-mail contains a link to the invoice that the cost center manager can use to open the invoice in the Viewer in DocuWare Web Client and then stamp the invoice for approval or reject it. Scheduling can also be used to send this notification just once a day with links to all invoices to be approved.

**Your benefits**

- Convenient working with DocuWare: users are immediately informed about new tasks, and the documents to be processed are available at the touch of a button.
- Document-based workflows can be completed more quickly, generating savings by approving invoices for payment within discount periods.

**Using the option**

- You automatically receive e-mail notifications for which you are entered as the recipient in the configuration.
- In the case of e-mail notifications released for subscription, you can enter yourself as a recipient in the *Web Client Settings* under *Customize DocuWare > All E-mail notifications*.
- Configurations for e-mail configurations are created in the *Web Client Settings* (see page 22). They can be assigned to specific people and/or released for subscription to all users of the DocuWare organization.  
You need the *Manage E-mail notifications* right to create or change e-mail notifications. You do not need any special rights to subscribe to e-mail notifications.

**1.5 DocuWare Mobile (only with DocuWare Mobile License)**

DocuWare Mobile lets you access your DocuWare file cabinet direct from your iPhone or iPod. You can load documents, view them on-screen and forward them in the workflow. A special stamp feature has been integrated for this. With DocuWare Mobile, these devices are now even better adapted for business use.



Display a document archived in DocuWare on your iPhone

## Use

- Say for example you suddenly need an update to the financial plan before meeting with a customer, you can now download this to your iPhone using DocuWare Mobile.
- Draw up the budget for a new project during a business trip
- Approve an invoice for work done from the beach so that the workflow never stops

## Your benefits

- Thanks to the new DocuWare business app, you can carry your file cabinet with you at all times and access the documents you need from everywhere, without having to cart a Notebook around with you.
- And because you can also display task lists, workflows keep running smoothly, even when the persons concerned are not actually working on their computer

## Using the option

- Buy a DocuWare Mobile license and import it into your DocuWare system
- Download the free app from the iTunes Store onto your iPhone

## 1.6 Full text

You also have some new options for the full-text search:

- Phrase search: "DocuWare AG based in Germering"
- Distance search: "DocuWare Germering"~10: The words "DocuWare" and "Germering" must be no more than 10 words apart.
- Sort search results by relevance

## Your benefits

- The full-text search returns more accurate results, in particular through sorting by relevance and distance search

## Using the option

In the full-text search, both in Windows Client and in Web Client.

## 1.7 ACTIVE IMPORT (basic version and add-on module)

As from this version, e-mails archived in DocuWare using ACTIVE IMPORT are marked as e-mails. From Web Client you can answer or forward these e-mails using the local mail client (see 1.1.4 Reply to and forward archived e-mails, page 8).

You cannot mark individual files as e-mail when using the *All attachments as separate documents* conversion option.

## Using the option

This feature does not need to be specially enabled, it is implemented automatically from DocuWare 5.1c.

## 1.8 CONNECT to Sharp (add-on module)

DocuWare now offers a completely new version for connecting Sharp multifunction printers to DocuWare, in addition to the previous one. With this version, you can not only store the documents being scanned in DocuWare file cabinets, but also in baskets in Web Client. There is also a feature directly on the MFP that allows you to select documents from a DocuWare file cabinet in order to print them.

When archiving documents, you can assign the index words in a number of ways: using a tree structure, a wizard, which helps you to fill in the individual index fields, or as before using a "normal" DocuWare store dialog.

The different methods of selecting documents that you want to print are available as before. You can also retrieve documents from task lists.

Both for archiving and for printing documents on an MFP you start by creating configurations in the *Web Client Settings*. These consist among other things of the selected file cabinet (or a basket in Web Client in the case of archiving), the type of indexing or document selection and the users who can use and/or administer the configurations.

Scanning with CONNECT to Sharp always produces PDF files.

## Use

- You use a configuration to scan incoming correspondence on the MFP directly into a DocuWare file cabinet. In the configuration and the store dialog it contains, the index words *incoming letter* and *new* are automatically assigned to the documents as the document type and status. On the MFP display, you enter the sender and name of the person for whom the document is intended as additional index terms.  
Any employees with a task list that displays documents with the index words *incoming letter*, *new* and the respective user name, immediately see their new correspondence.
- You use a customized configuration to scan incoming invoices on the MFP into a basket in Web Client. The index words *incoming invoice* are automatically assigned to the documents as the document type, and *Assign cost center* as the status. Other index terms such as sender and invoice number are entered either directly on the MFP or in the basket. On the workstation, you open the scanned invoices from the basket in the Viewer and stamp the documents. You enter the number of the department and the name of the person who is responsible for approving the invoice. The number and name are automatically adopted as index words, and the status is changed by setting the stamp in *Approve/reject invoice*. The invoices are archived with these index words, and the invoice approval workflow starts.
- On the way to a meeting you remember that you haven't got the minutes of the previous meeting. You search for the minutes, which have been archived in DocuWare, directly on the MFP and print them out.

## Your benefits

- You create accurate configurations for different document types and archiving scenarios, resulting in user-friendly scanning and archiving in a single step on the MFP
- Scan to a basket in Web Client, for example to stamp documents before archiving them
- Select archived documents for printing directly on the MFP

## Using the option

- Call individual configurations for archiving or printing direct from the display on the MFP
- Create configurations: Centrally in the *Web Client Settings* (see page 22), CONNECT to Sharp section. Configurations can be created by the administrator and made available to various DocuWare users, but individual users can also create their own configurations.  
To create or edit these configurations you need the *Manage CONNECT to Sharp* right, which is assigned in DocuWare Administration.

## 1.9 Call DocuWare from external applications without an active login

For accessing DocuWare from external applications, there is now a special DocuWare user, the so-called *Trusted application user*. This trusted application user can access DocuWare from any external application, without the user having an active login. This access without login works using the *Trusted application user* even when a normal Single Sign-On is not possible, for example because different domains are involved or because the external application does not allow a Windows login. The *Trusted application user* is sent from the external application to DocuWare together with the user name of the person logged into the external application.

## Use

If a user in an ERP system, in which Windows authentication is not permitted, wishes to access a document in DocuWare, he must first log in to DocuWare with his user name and password. The same applies if someone has logged on to an MFP with a smart card and not only wishes to copy a document, but to store it in DocuWare at the same time - in this case too a login is required. In order to avoid delaying the work process with login procedures, a trusted application user is used. The login takes place in the background and the user is not involved in any way.

The external application sends the *Trusted application user* with its user name and password to the DocuWare login and simultaneously supplies the name of the user currently logged into the external application. The user of the external application must be the same as a DocuWare user, who is then used to log into DocuWare. Once logged into DocuWare the user has access to the functional rights and file cabinet rights which he holds as a DocuWare user.

## Using the option

- You create the *Trusted application user* in DocuWare Administration, under *User Administration > Trusted application user*
- Store the user ID of the *Trusted application user* also in the external application

## 1.10 CONNECT to SharePoint (Add-on Module)

The SharePoint connection to DocuWare has been expanded. As well as SharePoint Server 2007, SharePoint Server 2010 Standard and Enterprise are now also supported. The three components Records Center Archiving, Search Federation Server and Web Client Integration work without difficulty in the 64bit environment of SharePoint Server 2010.

## 2 Installing and updating DocuWare

### 2.1 Setup

The setup for DocuWare 5.1c has been revised. When installing the system you can now choose between two different types of installation: *Default* and *Custom*.

The default installation uses default values wherever possible, to ensure the installation routine requires as little user interaction as possible. The custom installation allows you to define special paths, ports, etc.

When selecting the client components, the following new ones are available:

- *Windows Explorer Client* as a new component (included in the default installation)
- *DocuWare Administration* and *DocuWare Windows Client* can be selected separately, i.e. DocuWare Administration does not have to be installed on client computers, and Windows Client does not have to be installed on server computers
- The *Tools* component includes a number of small applications designed especially for administrators, including IndexCleaner (page 25), DWEXTENSION Administrator (page 26) and URL Creator.

### 2.2 Windows Explorer Client

You can install Windows Explorer Client on workstations separately, i.e. without a DocuWare Client installation. You can run the setup for this for example from Web Client, by going to *My DocuWare* dialog > *Start* tab > *Install desktop applications*. You can use Windows Explorer Client without a special license, all you need is the appropriate user licenses (Named or Concurrent), as for the other DocuWare clients.

If you want to use Windows Explorer Client in your organization, you need to define a few preliminary settings for the file cabinets to be displayed using Windows Explorer Client. For more information please consult the Windows Explorer Client manual, which you will find in the document pool on the DocuWare website or via the DocuWare Knowledge Center <http://help.docuware.com/en>.

### 2.3 Licenses

#### 2.3.1 Smart Connect

For the new Smart Connect add-on module (see page 14) you need the license of the same name. You can also use Smart Connect with DocuWare BUSINESS Server.

#### 2.3.2 Task Manager

With the Task Manager license you can use task lists and e-mail notifications (see page 15) and therefore use DocuWare to run very user-friendly document-based workflows.

In the area of task lists this license overlaps with the CONTENT-FOLDER license.

Component License	CONTENT-FOLDER (Windows Client)	Task lists (Web Client)	E-mail notifications
Task Manager	-	✓	✓
CONTENT-FOLDER	✓	✓	-

## 3 DocuWare System

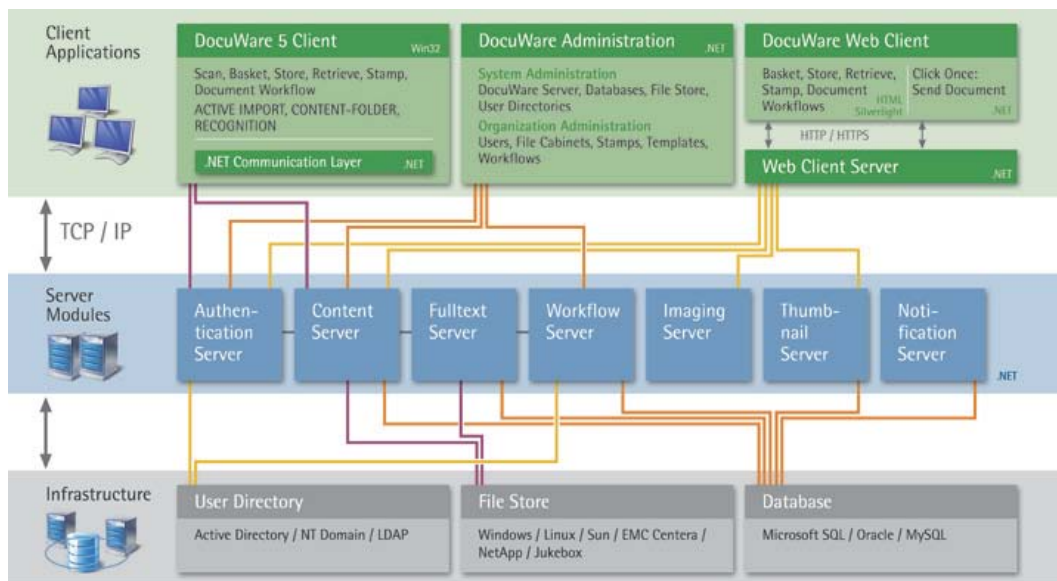
### 3.1 Server components

The DocuWare system has been expanded through three new servers:

**Fulltext Server** is responsible for creating and updating the full-text catalogs.

**Thumbnail Server** is responsible for saving and querying thumbnails for display in the Web Client Viewer and basket. For better performance, the thumbnails are not recreated each time they are loaded, but saved in a dedicated database and made available from there when needed for display.

**Notification Server** is used for the e-mail notifications (only with Task Manager license).



### 3.2 Synchronization

In DocuWare 5.1c and subsequent versions, synchronization workflows can also run between file cabinets of different DocuWare versions. For example, if a new service pack or new DocuWare version has been installed on a server but not yet on a mobile client, the file cabinet of both systems can still be synchronized.

### 3.3 Windows 7 compatibility

DocuWare is Windows 7 compatible. This also applies to the components

- ACTIVE IMPORT
- DocuWare Windows Client with Viewer
- Office Add-In...
- RECOGNITION
- CONTENT-FOLDER
- DocuWare Service Control

## 4 Managing DocuWare

### 4.1 Web Client Settings

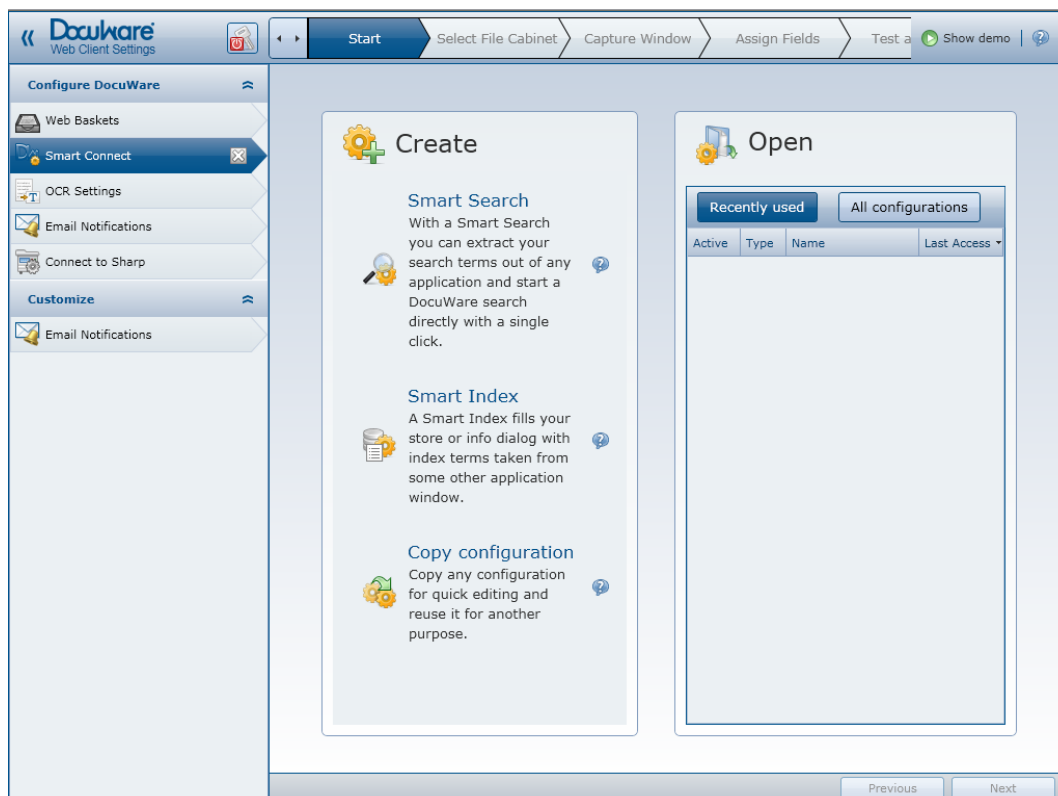
You administer new DocuWare components, especially for Web Client, in a new, browser-based user interface based on Silverlight technology. Currently, the Web Client settings include the following areas:

- **Configure DocuWare**
  - **Baskets:** Create and manage baskets for Web client, assign baskets to individual users or roles
  - **Smart Connect:** Create and manage Smart Connect configurations, assign the configurations to individual users or roles
  - **E-mail notifications:** Create and manage configurations for e-mail notifications, assign the configurations to individual users or roles
  - **OCR:** Create and manage OCR configurations that can be used by Smart Connect, assign the configurations to individual users or roles
  - **CONNECT to Sharp:** Create and manage configurations for connecting Sharp MFPs to DocuWare, assign the configurations to individual users or roles
- **Customize DocuWare**
  - **E-mail notifications:** Subscribe to e-mail notifications made freely available

To access the individual components in the administrative area you will need the corresponding rights, which are assigned in DocuWare Administration, under *Users/Profiles > Function settings*.

#### Loading the Web Client Settings

- In Web Client via the *My DocuWare* dialog, *Start* tab > *Open settings*
- Via the menu in DocuWare Administration: *Tools > Open Web Client Settings*



Web Client settings, here with the area for Smart Connect

## 4.2 DocuWare Administration

The following changes have been made to DocuWare Administration in version 5.1c:

### 4.2.1 Menu

DocuWare Web Client settings can be loaded from DocuWare Administration, via the *Tools > Open Web Client Settings* menu.

### 4.2.2 System Administration

- **Imaging Server:** From version 5.1c DocuWare Imaging Server is managed in DocuWare Administration like the other servers.
- **Notification Server:** DocuWare lets you send e-mails to users, for example when documents with defined index words have been stored in a file cabinet. Notification Server is responsible for sending the new e-mail messages.
- **Thumbnail Server:** DocuWare Thumbnail Server is responsible for saving and querying thumbnails for display in the Web Client Viewer and basket. For better performance, the thumbnails are not recreated each time they are loaded, but saved in a dedicated database and made available from there when needed for display.
- **Database connection for baskets in Web Client:** The information for baskets in Web Client is stored in the database. From version 5.1c, database connections therefore have the new option *Used for: Baskets in Web Client*. The option appears both in the wizard and in the table of settings.
- **Storage locations for baskets in Web Client:** DocuWare storage locations can now also be used for baskets in Web Client. From version 5.1c, storage locations therefore have the new option *Used for: Baskets in Web Client*. The option appears both in the wizard and in the table of settings.
- **Data connection to Notification Server:** DocuWare lets you send e-mails to users, for example when documents with defined index words have been stored in a file cabinet. A user of Web Client can also request a new password if they have forgotten theirs. The system needs specific connections to the mail server for these purposes. For this reason, in 5.1c you can set up and manage SMTP (Simple Mail Transfer Protocol) connections to the mail server in DocuWare Administration and make them available to the user for example when configuring e-mail notifications.
- **Data connection for full text:** The Fulltext Server connection contains the information needed to use DocuWare Fulltext Server which provides full-text information within the DocuWare system. At installation, a Fulltext Server connection called *DocuWare Fulltext* is set up automatically.
- **Backup:** A workflow monitor now informs you of progress on the creation of backup files, when you are creating these files.

### 4.2.3 Organization Administration

#### General

- **Web instance:** There is a special Web instance for the new CONNECT to Sharp add-on module where you can assign result lists in the tree view.
- **Extension lists:** You can involve or exclude particular file endings for DocuWare full text. That means the user specifies which files should be read by the full-text service and which not. For example, it is a good idea to exclude music and video files, to avoid overloading the performance of the full-text service. You can manage the available lists, delete them or create new lists under the new *Extension lists* node. The lists are used in the full-text settings in the Full text node under each file cabinet. Full-text lists can be used for any number of file cabinets. Special lists can also be defined for each file cabinet, depending on requirements.

### User Administration

- **Trusted application user:** You create, manage, and delete users from trusted applications at <Organization x> - Trusted application user level.  
A trusted application user can access DocuWare from any external application, without an active login by the actual user. This access without login works using the *Trusted application user* even when a normal Single Sign-On is not possible, for example because different domains are involved or because the external application does not allow a Windows login. (See 18). Calling up DocuWare from external applications without an active login)
- **The Default profile and role** are now set up by default in the installation of DocuWare version 5.1c. The *Default* profiles and roles are used to enable the new rights added with each new release. The *Default* role is assigned to the *Public* group, so that all users in this group receive the new rights.
- **Users and function profiles:** From version 5.1c you can configure DocuWare Web applications in the DocuWare Web Client settings. The rights for these configurations are managed in DocuWare Administration. For this reason users and function profiles now have the new *Web Client Settings* item and the options *Manage Smart Connect-configurations*, *Manage Web Client baskets*, *Manage E-mail notifications*, *Manage CONNECT to Sharp configurations* and *Manage OCR configurations*.
- **Selecting users:** For rapid access to the settings of a particular user, select the *Users* node in the tree view in Administration and type the first letters of the user name whose user settings you want to edit. For example, if you type "b" you are automatically taken to the first user whose name begins with "b". You can type the second letter of the name within a time interval of three seconds.

### File cabinets

- File cabinets have some **new system fields**: "DWEXTENSION": The document format (file extension) is written to this field. "DWDocSize": The document's file size (minus the header) is written to this field. "DWHeaderSize": The size of a document's header is written to this field.
- Under the <File cabinet x> node there is a new **"Full text" node** - this contains all the full-text options for a cabinet.
- The **status monitor** is no longer to be found under the file cabinet node, but can be accessed via the <Full-text service x> node.
- The **file cabinet settings have some new options**:
  - *Access via Windows Explorer Client allowed* must be enabled to enable a file cabinet to be accessed from Windows Explorer Client.
  - *User from trusted application allowed* must be enabled in order that a user can access the file cabinet via the "Trusted application user" feature.
  - *E-mail notifications*: If this option is enabled, e-mails can be sent to selected users when certain actions take place in the file cabinet, such as storing a document with specific index criteria. Only if this option is enabled can the file cabinet be selected for e-mail messages in the Web Client Settings. A Web instance must also be selected for the e-mail messages.
- The **field definition** has a new *Description* line. The description can for example relate to which entries are expected here. The description is displayed in new and future applications, for example in the add-on module CONNECT to Sharp Version 2. The description on the copier control panel appears here.
- For **fields** there is a new predefined entry: "CURRENTUSEREMAIL".
- **New features in the Web Client result list**:
  - *Reply*, *Reply to All* and *Forward* for e-mails
  - *Edit document*
  - *Document Display in sep. viewer*
- **Tree views** for use with Windows Explorer Client can contain up to 10 levels (Windows client still only supports 3 levels)

### Workflows

- **Full text for COLD documents:** Even documents from COLD documents that do not exist in TIF format can be extracted for full text from version 5.1c.
- **Synchronization:** In DocuWare 5.1c and subsequent versions, synchronization workflows can also run between file cabinets of different DocuWare versions. For this reason you can now decide in the wizard and in the table of settings whether a synchronization should run dependently (both file cabinets in same DocuWare release versions) or independently of the DocuWare versions.
- **Thumbnail workflow:** The new Thumbnail workflow generates the thumbnail views displayed by Thumbnail Server in Web Client. Individual workflows always relate to a single file cabinet and can be initiated by scheduling. They can be used for example to generate thumbnails when there is relatively little traffic on the Thumbnail Server being used.

## 4.3 IndexCleaner

You can use IndexCleaner to correct the index data in your file cabinets quickly and easily. It allows you to correct typing errors, for example in company or personal names, or standardize how names are written ("First name Last name" or "Last name First name"). The system does this by checking an index field for similar entries, generates word groups with similar index entries and identifies how often the individual terms occur in the index field. You specify which term is to be used from now on and which index entries should be corrected.

### Use

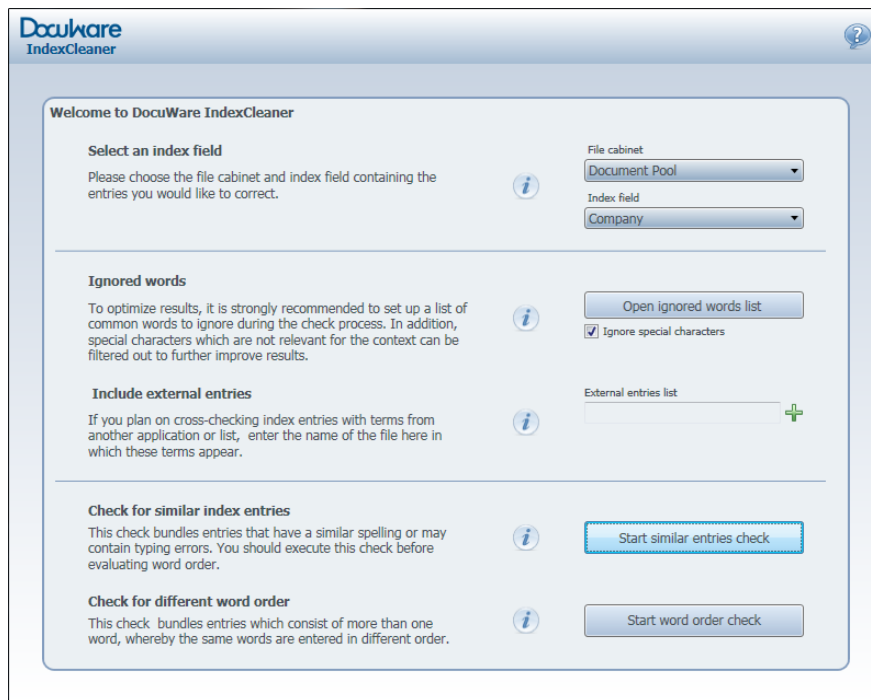
- Correct and/or standardize index entries to make documents easier to find.
- In combination with Windows Explorer Client, it makes sense to correct the index terms used for the folder structure first. For example, if you use an index field containing the company name for folders, you do not want to end up with multiple folders for the same company because the company name was not always spelled identically in the index entry.

### Your benefits

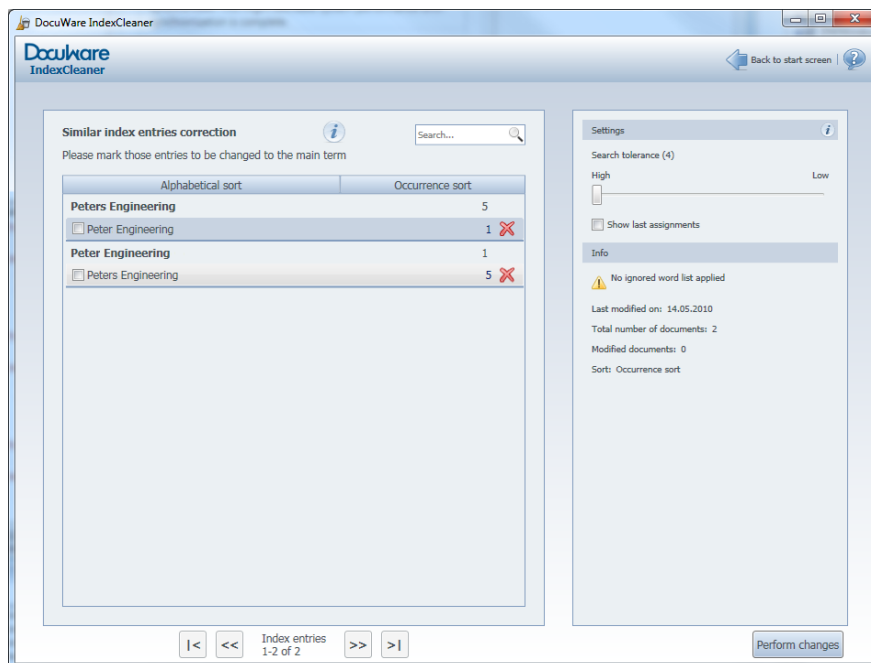
- You can now find the documents you are looking for in the "cleaned up" file cabinet as no documents are excluded from the search on account of typing errors made when the index terms were entered.
- Clear folder structure in Windows Explorer Client

### Using the tool

The tool is installed by the setup if you select the *Tools* client component.



*IndexCleaner start dialog: Prepare the index cleanup here*



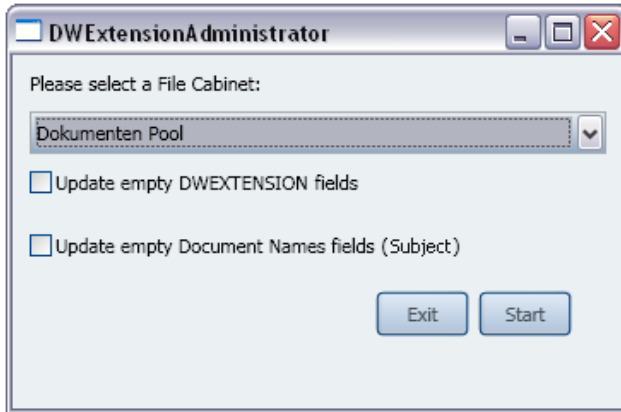
*Correction window: Similar index entries are listed in word groups*

#### 4.4 DWEXTENSION Administrator

The DWEXTENSION field is needed for use with Windows Explorer Client. This field is automatically populated with the document file extension of all new documents stored. For documents already archived, the system field is populated by the DWEXTENSION Administrator tool. The tool must be run once on all file cabinets used in Windows Explorer Client in order that documents archived before version 5.1c can also be displayed.

### Using the tool

The tool is installed by the setup if you select the *Tools* client component.



*DocuWare Extension Administrator*

## 4.5 New JAPI Version (JAVA-API)

There is a new JAPI version with DocuWare 5.1c. You will need this if you wish to connect to DocuWare 5.1c via third-party JAVA applications.

For existing connections, you simply need to replace the old JAPI files with the new ones. You need JAVA Version 1.6 or higher.

### Downloading the JAPI files

The JAPI files are available to download from the *Developer Network* area on the DocuWare homepage.