

DocuWare 5 in Detail

From Storage to System Administration: Here's an Overview of DocuWare's Features

DocuWare 5 offers several new features, options and improvements. Whether you are indexing documents or starting a search, are setting up file cabinets or administering users or an entire installation, DocuWare has added some very useful new features for you. Read on to see all that DocuWare can do for you.

Documents

Capturing Documents

- Scans paper documents from business card size to E-size drawings in b&w or color
- Standard format of image files: 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 is optional
- Scanned documents always remain "genuine", i.e., unaltered, tamper-free

- Annotations can be merged with the document
- *Option: automatic merge of 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
- Text read by OCR in graphic documents; copied into clipboard or entered into store window
- Barcodes: *read directly from document; copied into clipboard or entered into store window*

Stamping Documents

- Customization of personal and public stamps in DocuWare Administration, 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 by simply adding a stamp

New features appear in italics

- Form fields can be inserted in stamp: a variable text can be entered when a stamp is added
- Electronic signatures as well as Qualified Electronic Signatures to initial, authorize or release a document
- *Speed up workflow: optional: automatic closing of viewer after stamp procedure*

Electronic Signatures

- Simple, Advanced and Qualified Electronic Signatures
- *Electronic Time Stamp*
- *Support of mass signatures: automatic placement of signature stamps for all documents in basket, e.g. for scanned documents; quality control by displaying every X document optional*
- *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: setting up requirements for using stamps; filter for certification authorities*
- *Support of standard protocols: PKCS#10 (Certification Requirements), PKCS#7/S/MIME, X.509 V3 (Certificate delivery), PKCS#7/S/MIME, X.509 V2 (Lock List Administration)*
- *Signature check/verification takes place within system*

Organizing Documents in Baskets

- 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/destapling
- 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
- DocuWare Viewer supports all widely used file formats
- Three simultaneous display windows for document comparison
- Printing right from the display, of selected sections as well
- Copy marked segments into 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
- *Page directly within viewer to next or previous document in result list or basket*
- *Zoom: in steps 10%, 25%, ...500% or as defined by the user*

Storing Documents

- Index words can be entered via customizable storage window
- *Over 4 billion documents per file cabinet*
- *Import documents with more than three characters as file extension*
- Optional: storage of files, storage of references instead of file copies
- Handling paper documents: creation of database entries without a document
- Fast indexing by pre-indexing documents in a basket
- Automatic triggering of index words from previously filed documents (manual AUTOINDEX)
- 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
- Administration of scanned documents, COLD data, PC files and e-mail in joint file cabinets (one central document pool)
- Letter size pages per CD: approx. 12,000
DVD: approx. 88,000

New features appear in italics

Retrieving Stored Documents

- Search using index words and with wildcards
- 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
- Export located documents into another file cabinet, basket, file directory or e-mail message
- Export retrieved database entries to dBASE or *.txt file
- Printing, faxing and sending of located documents
- Sort result lists with a mouse click

Fulltext Indexing and Searches

- *Automatic fulltext indexing of a file cabinet regardless of which database used*
- Powerful OCR reads text from scanned documents, while an integrated text filter sorts through text and other common PC files
- Locating documents by using words out of document text, memo fields, COLD files
- *Search with wildcards before and after a word*
- Highlighting of located hits when displaying documents in viewer for scanned, COLD and other CI documents
- *Optional hit display after fulltext search with the page of a document containing the hit shown in viewer*

E-Mail / Fax

- Send any document or individual pages via e-mail directly from DocuWare out of basket, file cabinet or viewer
- Use of 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
- Extracting mail attributes such as sender, recipient, data, subject as index criteria or index words in file cabinet
- Automatic assignment of index criteria of filed e-mail by using a Matchcode, e.g. an e-mail address
- Faxes sent directly out of DocuWare through common 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 menu and result list can be customized for individual users or groups
- Rapid paging using keyboard or mouse: 4 pages/sec (b&tw)
- Maximum reading clarity due to new interpolation procedure for optimizing display
- Comprehensive context-sensitive help in both client as well as DocuWare Administration

System and File Cabinet Administration

- Access to DocuWare system optional 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: clearly organized with directory tree showing all administrative processes within a program*
- *System, organizations and file cabinet administration all handled with DocuWare Administration*
- *Managing of accessible features for a user extending beyond his/her rights: settings options which the user does not have access rights to are not displayed in DocuWare Administration*
- *Test of all connections to databases and document storage paths all within DocuWare Administration*

DocuWare Server Modules

- *Authentication Server: administrates licenses and users, granting of user access to features and documents, management of all settings*
- *Content Server: administration of documents, handling of access to files and index data*
- *Workflow Server: administration and management of batch processes and workflows*

New features appear in italics

System Administration

- *System Administration: management of the entire DocuWare system and its integration in the IT environment and connection to external service providers*
- *Storage Paths: central administration independent of physical medium*
- *Database Connections and Authorizations: administered centrally on system level, all may be integrated through databases tested by DocuWare (MS-SQL, Oracle, MySQL)*
- *Administration of DocuWare server modules: authentication Server, Content Server, Workflow Server*
- *Performance and Scalability: use of multiple Content Servers on different physical machines (volume), use of multiple databases: file cabinets can be distributed on multiple databases running on different physical machines (volume), no limitation regarding the database program (various databases within a system is possible)*

Organization Administration

- *Organization Administration: management of user organization, licenses, feature rights, users, stamps and external select lists*
- *External Select Lists: administration, setting up and editing within an organization*
- *Static External Select Lists: one-time read of data from external system (database, text file) or one-time entry of data*
- *Dynamic External Select Lists: dynamic queries of external system 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.*

Rights Administration

- *Central administration of users and rights in DocuWare Administration*
- *Function Rights: access to individual menu features (scanning, printing, etc.), stamps, select lists, configurations (templates); definition of function rights on organization level*
- *File Cabinet Rights: access rights to documents in file cabinets; definition of file cabinet rights on file cabinet level*
- *Profile: grouping of functional rights into function profiles and from file cabinet rights to file cabinet profiles*
- *Roles: task-specific grouping of function profiles and file cabinet profiles; roles can be assigned to individual users or user groups*
- *Pre-Defined Roles: system Administrator, Organization Administrator and File Cabinet Owner.*
- *System Administrator: administers overall DocuWare system and its integration in system-technical environment, database connection, storage paths for documents*
- *Organization Administrator: administers organization-typical settings, e.g. user and access right administration*
- *File Cabinet Owner: administers 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, groups and roles in external Directory Service with those of DocuWare system, support of LDAP and Active Directory Services*

File Cabinet Structure Administration

- *File Cabinet Administration: structure of file cabinets and controlling access rights to a file cabinet*
- *File cabinet identification through unique ID used worldwide*
- *File cabinet name: up to 64 characters in length*
- *File cabinets on hard disk, CD, DVD, WORM in manual or jukebox system, in use, Content Addressed Storage (CAS) and Storage Area Network (SAN) solutions; support of RAID systems; hierarchical storage management*
- *Organization of storage on logical disks, user-defined capacity limitations such as CD/DVD size; up to 999,999 logical DocuWare disks per file cabinet*
- *Document administration via integrated or external databases*
- *Database type may be selected individually for each file cabinet and combined in any manner within a DocuWare system*

New features appear in italics

- Automatic generation of log fields for each file cabinet: user name and date, time of storage, last change and last access
- Number of database fields (text, numeric, date) per file cabinet: maximum 50
- Text fields: maximum length 1-255, any size with in 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 windows

File Cabinet Rights Administration

- General rights: store, attach, search, edit
- Rights to documents: Display, edit, delete, export
- Access to index data, definition of each index field: read, search, write, edit, field may not be empty, entry must be in select list, no new entries; access to overlays: create, delete, edit annotations, delete stamps on documents
- Access to search menus, store menus and result lists
- Granting file cabinet rights depending on filter criteria: definition of filter with a general search menu; a user is only granted access to a document if the field entries of the document meet the requirements of the filter (Index Filter)

Automated Handling of Documents

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

Synchronizing File Cabinets

- Synchronization of central master file cabinets and decentral satellite file cabinets
- Satellite file cabinets can be set up on notebooks or in remote locations
- Mobile user: set up of satellite file cabinet on notebook, important documents available "on site," changes also possible "on site"
- Remote locations: satellite file cabinets serve multiple users at subsidiary/field office, synchronization takes place when network least used, e.g. overnight
- Different structures in master and satellite file cabinets possible, mapping of index fields
- Transfer options from the master file cabinet into the satellite file cabinet: document stored in master and/or document deleted in master and/or document changed in master
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- Conflict solutions modified with option settings: master file cabinet overwrites satellite file cabinet, or last change in either the satellite or master file cabinet, or no action just logging.
- Start synchronization workflow from client

Export

- Export existing file cabinets within system, target file cabinet is a new or existing file cabinet

Migration

- Automatic copying/moving of documents, e.g. from hard disk to optical media within a file cabinet
- Recording: optional to create a copy of the data to be recorded for later recording with any program

Logging and Monitoring

- Logging all changes and activities within the whole system
- System Administrator can determine which system changes/activities to log
- Organization Administrator can determine which changes/activities to log on organization level
- File Cabinet Owner can determine which changes/activities to log on file cabinet level.
- Case-by-case definition of content of logging entries, logging cannot be defined beyond access rights of administrator (a system administrator cannot log any information that he/she has no access to)
- Optional: filter of logging information, e.g. only entries in a special database field or login of specific users activities

New features appear in italics

- *System Administrator, Organization Administrator and File Cabinet Owner set goals for logging database, XML file or text file other administrators may use these goals*
- *Alarm feature: additional output options for critical errors, such as e-mail*
- *Optional size limits of logging data*
- *Access protection of logging files may be modified by each administrator*
- *Default logging of all changes in system, all runtime changes in documents as well as all workflows*

Compatibility

- *DocuWare 5 can work with DocuWare 4 documents*
- *Conversion of file cabinets in DocuWare 4 mode into file cabinets in DocuWare 5 mode*

Copyright Protection

- *Scanned documents in database show as "copyright protected"*
- *No simultaneous access to copyright protected documents*
- *Limited 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)*
- *Regeneration of defect databases using information stored in XML header files*
- *Manipulation/tamper protection of archived documents via encrypted checksum*
- *Encrypted communication optional: communication between client and server using Windows mechanisms*
- *Registration via DocuWare or Windows login (Single Sign-On)*
- *Transactions: system constantly secures integrity of data, document changes and storing are handled by transaction for both the index data as for the 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*

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 other with Windows file system support*

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