

DocuWare®

DocuWare 4.5

Document Management Designed for 5 to 5,000 Users

DocuWare 4 is the cornerstone of the DocuWare document management product line. It gives you the power to electronically store and organize all kinds of documents — from accounting records to correspondence, from e-mail to technical drawings, and much more. DocuWare is widely known for its complete functionality, simple administration and useability, seamless integration and absolute security.

Capture, Index and Store

Documents in paper form, such as incoming letters and invoices, are simply scanned into DocuWare and digitized. First they are placed in an electronic “in-basket,” where they are sorted and stapled together. DocuWare provides several options to easily create an index, which contains keywords or index words for organizing and retrieving documents later. Then this documents can be quickly and safely stored in well-structured electronic file cabinets.

Files from Word, Excel and PowerPoint are stored with a click of a mouse in a DocuWare file cabinet. E-mail messages are indexed and stored automatically by DocuWare. With DocuWare TIFFMAKER, documents from any Windows application can be indexed and automatically filed in the background while they are being printed. Forms and letterhead, which were used for the original print-out, can be laid over the Windows document, ensuring the original appearance of the stored documents.

As soon as they are filed, every document can be accessed by all authorized network users.

Retrieval and Processing

Searching for documents in a file cabinet is simply a matter of seconds. You can search for any document by filing date, by any assigned keyword and even by full-text retrieval, which looks for any words or numbers found in the complete body of a document. Multiple users can access the same document simultaneously, so a document is never unavailable. Documents can also never be lost or filed in the wrong spot with DocuWare.

The DocuWare viewer displays scanned color and black and white documents, as well as, the most popular PC files. Keywords found in the text are specially highlighted as “hits”

From the viewer, areas can be marked in scanned documents and then transferred as a graphic or text through the clipboard into other Windows programs.

Highlights

For all document types: letters, faxes, records, e-mail, drawings, etc.

Extremely simple installation, administration and useability

Integrated full-text retrieval

Automatic filing with TIFFMAKER, universal for every Windows application

Tamper-free document security

Access to all documents within seconds

Integrated client-server database based on MS SQL-Server



Incoming Faxes

Incoming faxes are received by fax modem, printed and filed automatically in an electronic file cabinet. In addition or as an alternative to the print-out, DocuWare sends all of the faxes to a central workstation. From there, they can be electronically distributed by e-mail to any recipient.

Document Editing and Stamp Function

Annotations such as colored marks, text, underlining and individually created stamps — such as signature stamps — can be added to any document. For this purpose, up to five annotation layers on top of the document can be activated. This overlay technique ensures that the document itself remains

unchanged. This means you can add notes right to a fax on the PC, and then fax it right back.

Document Security

Documents stored with DocuWare are protected against any unwanted manipulation. This security feature is based on a sophisticated check sum mechanism, which uncovers any violations of document integrity. This makes DocuWare the ideal repository for any documents that need to be guarded against illegal modification.

E-mail Correspondence

Documents, notes and even voice annotations can be sent with DocuWare through a network. With an integrated MAPI interface, documents are sent and received by e-mail — even if you are e-mailing someone who is not using DocuWare.

E-mail which is received or sent with Microsoft Outlook can be automatically filed in DocuWare. The index can be set up with freely defined terms such as “Incoming Mail,” as well as, with parts of the e-mail, such as the address of the sender and subject of the e-mail. The full name of the sender or recipient can be automatically traced and enhanced using information from previously stored e-mail in DocuWare file cabinets.

Name	Doc-Type	Date	Subject
BERRY IMPORT	INVOICE OUT	18.09.2001	NO. 800747
BERRY IMPORT	LETTER OUT	20.09.2001	CLOSE CONSIGNMENT
BERRY IMPORT	E-MAIL IN	10.08.2001	REQUEST FOR A QUOTE LISBON-LONDON
BERRY IMPORT	FAX OUT	15.08.2001	QUOTE 05778 LISBON-LONDON
BERRY IMPORT	LETTER IN	18.09.2001	SATISFACTION CONSIGNMENT
BERRY IMPORT	FAX IN	25.08.2001	ORDER LISBON-LONDON

DocuWare main window, showing result list and document display in viewer.



DocuWare Workstation

Administration

One of DocuWare's signature features is its intuitive administration and ease-of-use. For every function, an administrator can quickly find a simple explanation in the program's online help. A complete reference of technical documentation is included as PDF files, which provide more in-depth and current information about managing a DocuWare system. User groups and accounts can be automatically transferred from a Windows network operating system with DocuWare. This eliminates the need to do twice the work for user group administration. When starting a client-PC, DocuWare takes over the process of registering the current user.

Powerful and easy-to-use tools enable the quick reorganization of file cabinets or parts of file cabinets, and movement to other storage media, servers or jukeboxes. DocuWare ensures maximum compatibility by building on standard interfaces and components of the most widely distributed network operating systems.

To rapidly find documents, DocuWare administers all index words and full-text indices in an integrated Microsoft SQL Server. For single PC applications,

such as on notebooks or file cabinets on a CD, an extremely fast file-based database is integrated. Additional database systems are supported through ODBC.

In addition, DocuWare stores all database information together with the document files. This provides double security. So that even in a worst case scenario, if database defects should arise or a complete system crash should occur, the complete database can be recreated. The architecture of DocuWare is designed to provide maximum document and data security.

Compatibility and Integration

DocuWare can incorporate all applications that create or open documents. TIFFMAKER files anything that can be printed out of Windows and add-on modules COLD/READ and ACTIVE IMPORT make sure that all other documents are automatically integrated. Displaying filed documents from other applications occurs with the help of DocuWare LINK or programming with the DocuWare TOOLKIT.

File Cabinets on CD and DVD (with an Add-on Module)

With DocuWare, you can always copy or move a file cabinet (or parts of a file cabinet) onto CD or DVD. During this process, the file cabinet and optionally the database and DocuWare CDREQUEST retrieval software are all transferred to the CD or DVD. This makes it possible to directly retrieve documents on this CD/DVD from any Windows PC, no matter if DocuWare is installed or not. This application is considered a "self-contained file cabinet."



DocuWare & Special Add-on Modules: The Right Solution for Every Task

The need for modern document management systems is numerous, since every company and every department has very special requirements. In response to this, DocuWare has developed a system that is based on standard software that can be applied universally, but can also be customized by using any number of add-on modules to meet more specific needs.

An overview of these add-on modules is provided below. Detailed data sheets on each module can be found on the Internet at <http://www.docuware.com>.

DocuWare DOCUMENT-SERVER

DOCUMENT-SERVER maximizes the security for stored documents, reduces administration efforts and enables remote access for DocuWare clients via an intranet or the Internet. Clients communicate through HTTP/HTTPS with DOCUMENT-SERVER.

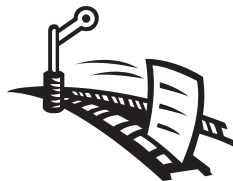
The program stores documents within the file system and then makes them accessible for retrieval, acting as a go-between. The access rights are set up using

DocuWare file cabinet rights.

Mobile or home DocuWare users, can use their local installation of DocuWare to access the file cabinets stored at the company, all managed by DOCUMENT-SERVER.

DocuWare CONTENT-FOLDER

With this add-on module, the user can put together any number of filed documents into special folders. The folders are usually retained on the Windows



desktop, as pending items in Outlook, sent via e-mail, or stored in any other spot. The folders do not contain actual files, but rather links to the original documents in

a file cabinet. If documents are changed or annotated in a file cabinet, the folder of each user is also updated. CONTENT-FOLDER provides fast access to documents you are currently working with, as well as, fast distribution of collections of important information to coworkers.

DocuWare RECOGNITION

Barcodes and text in documents are automatically read, and the information is transferred to a file cabinet as index words. For example, an accounting record number which is pasted as a barcode label on an incoming invoice, will be recognized after scanning with absolute certainty. For text, powerful OCR reads the information from fixed spots on documents with relatively good print quality.

DocuWare COLD/READ

Mass records generated by your own computer system — such as invoices, delivery forms, account and journal records — can be automatically filed in DocuWare using the COLD/READ add-on module. The spool data that is created when printing the records is automatically imported by COLD/READ. Specific index words are filtered out, and the data is converted in such a way so that the records can be retrieved, displayed, and printed along with all the rest of the scanned documents contained in a DocuWare file cabinet.





DocuWare LINK

DocuWare LINK lets you incorporate DocuWare into any existing Windows application. That way you can view filed documents or enter search words with a click of the mouse from any Windows application. This is all done without any additional programming!

DocuWare AUTOINDEX

Somewhere in your computer system, such as in an accounting program, you already have scanned documents that have numbers, values or names that could be used as index words for new documents coming into the system. That's where DocuWare AUTOINDEX comes in. Its only requirement is to have a unique index word, like a barcode or record number, which can be used to search for the remaining information.

DocuWare INTERNET-SERVER

DocuWare file cabinets can be accessed via an intranet or the Internet. Authorized users can then retrieve and store documents in DocuWare file cabinets from around the world. The only thing needed is an everyday Web browser and DocuWare INTERNET-SERVER. With the help of style sheets, the design of the user interface can be completely customized to look like the rest of your Web design.



DocuWare TOOLKIT

Using the powerful API interface or OLE automation, important DocuWare functions can be used within other external applications. The TOOLKIT makes this job easy for programmers.

DocuWare ACTIVE IMPORT

Folders within the file or mail system are specifically monitored. All files or e-mail that ends up in these folders is immediately transferred into DocuWare. In addition to the functions contained in DocuWare 4, this add-on module enables the integration of file converters, the automatic index



extraction of information from external files and databases, special functions for document classification, and running ACTIVE IMPORT by pre-set times in server mode.

DocuWare CONNECT to NOTES

E-mail and documents from Lotus Notes are automatically filed by DocuWare. The Domino server is relieved and all Notes documents are managed alongside the other documents, files and records belonging to a certain project or client. In addition, scanned documents from DocuWare are also made available for further processing in Lotus Notes.

DocuWare CONNECT to R/3

Using a special SAP-certified interface, DocuWare becomes an archive for R/3 — including all modules and versions of R/3, even mySAP.com. All document types and filing methods are supported.

DocuWare can use the same database system as R/3 for its file cabinets, plus

it offers additional valuable functions such as access to file cabinets without R/3 and the simple integration of external scanning service providers.



Functions and Technical Data: DocuWare 4.5

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 by "dragging & dropping" from applications like Explorer
- 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 automatic conversion of documents from Windows applications into DocuWare TIFF files or color JPEG 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 scanned documents with overlays: lines, arrows, circles and squares
- Text marker function with choice of colors for translucent or masking highlights
- Notes and text can be positioned anywhere — font, font size and color can be selected
- Customizable stamps (9 personal stamps and 9 network stamps are available per user), such as a scanned signature, additionally with date and user ID



- 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
- 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

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 multiple-page documents
- Display documents as lists or thumbnails
- Choice of basket color
- Auto-Rotate: correct alignment of upside-down documents

Displaying Documents

- Optimized display of scanned black and white documents with "scale-to-gray"
- Extremely fast scrolling with keyboard or mouse: 4 pages per sec. (b&w)
- Display computer-generated files with either DocuWare viewer or the original program

- DocuWare viewer supports: BMP, PCX, JPEG, Excel, Word and others

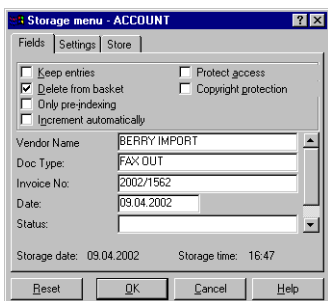
- Three simultaneous display windows for document comparison
- Variable positioning of display window
- Print directly from display segments, as well as whole documents
- Copy marked segments into the Windows clipboard as an image or text (with integrated OCR) and paste into other applications
- Convert scanned documents into other image formats, e.g. BMP

Storing Documents

- Infinite number of file cabinets per system
- Optional management of documents by integrated client/server database, which is based on MS SQL or with external database with compatible ODBC interface (e.g. SQL Server, Oracle, Sybase)
- Database types can be selected individually for each file cabinet and combined as needed within DocuWare system
- Menu-guided transfer of file cabinets from hard disk to CD-ROM or DVD with database and DocuWare CDREQUEST retrieval module



- Only create an image of files to be recorded, for later recording with any program
- Up to 16.3 million documents stored per file cabinet
- Max. number of pages per document: 999
- Number of index/database fields (text, numeric or date) per file cabinet: 24
- One full-text memo field with 64 KB plus a field with a maximum of 64 extra keywords per document
- Create index or keywords with user-friendly storage menu



- Storing computer-generated files: saving references or links instead of file copies possible
- Creation of database entries without a document
- Fast indexing by pre-indexing documents in a basket
- Automatic triggering of index words from already filed documents (manual AUTOINDEX)

- Set or dynamic pick (select) lists for each database field
- Fixed terms for selected fields, ensuring single classification structure
- 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

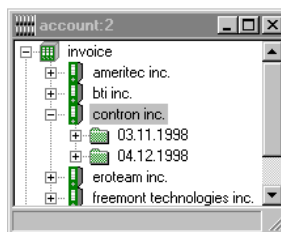
Full-Text Indexing

- Automatic full-text indexing of a file cabinet with the help of an indexing program
- Powerful OCR reads text from scanned documents, while an integrated text filter sorts through text and other common PC files
- Locate documents using any word contained in the document text

- Hits are highlighted — located keywords are highlighted when the document (even a scanned document) is shown in the viewer

Retrieving Stored Documents

- Search using index words
- Hierarchical search with Explorer display



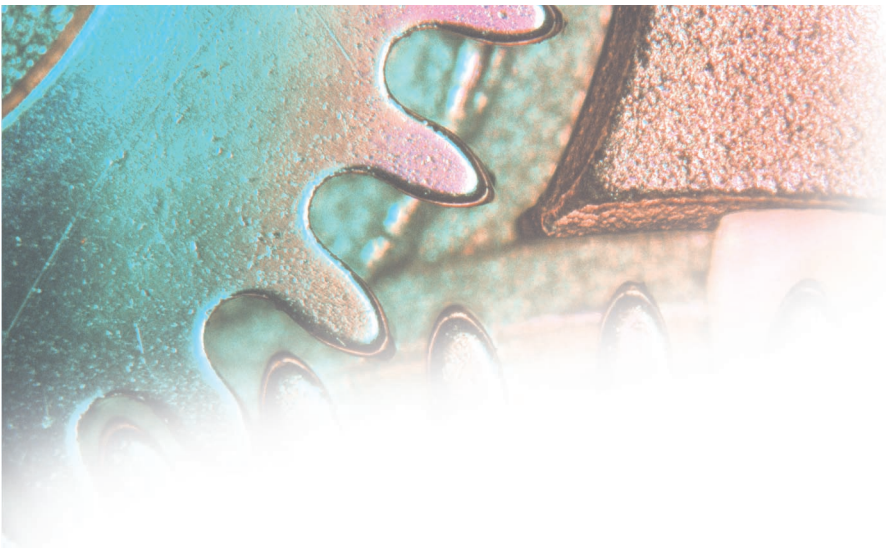
- Full-text search through index, memo fields, COLD data and complete document text
- Search by wildcards
- AND/OR searches within one field or between fields
- Select lists for each database field
- Search in one or multiple file cabinets
- Display retrieved documents along with the corresponding index words in a results list

- Individual settings for window size, font size, column width, tool bar and results list buttons
- Appearance of search menu, storage menu and results list can be customized for individual users or groups
- Export retrieved documents to another file cabinet or basket
- Export retrieved database entries to dBASE or *.txt file
- Print, fax and e-mail retrieved documents
- Hits are highlighted — found index words are highlighted in the document, including scanned, COLD and other CI documents

E-mail/Fax

- Send and receive any document via e-mail directly in DocuWare
- Parallel, integrated use of DocuWare mail and MAPI-compatible mail systems (MS-Mail, Internet etc.)
- Integrated, fully functional e-mail client with direct filing function
- Automatic storage of incoming and outgoing e-mail from MSOutlook using a basic integrated version of ACTIVE IMPORT
- Extracting mail attributes such as sender, recipient, data, subject, etc. as index words in file cabinet

Vendor Name	Doc Type	Invoice No:	Date:	Status:	Stored by:
AMERITEC INC.	INVOICE	1194	11.02.1998	VALID	SANDERS
BTI INC.	INVOICE	1400	12.11.1998	INVALID	SANDERS
CONTRON INC.	INVOICE	2264	04.12.1998	VALID	SANDERS
CONTRON INC.	INVOICE	2273	03.11.1998	VALID	SANDERS
EROTEAM INC.	INVOICE	1182	05.12.1998	INVALID	MILLER
FREEMONT TECHNOLOGIES INC.	INVOICE	2346	05.09.1998	VALID	MILLER
FREEMONT TECHNOLOGIES INC.	INVOICE		07.08.1998	VALID	SANDERS



- Automatic indexing of new e-mail with the help of previously filed e-mail by setting up match-codes, e.g. e-mail address
- Faxes sent directly out of DocuWare through common Windows fax programs

File Cabinet and System Administration

- File cabinets stored on hard disk, CD, DVD, WORM, MO, Jukebox
- Copy between file cabinets
- Password protection
- Hierarchical storage management: automatic migration of older documents from hard disk to optical memory (batch process with schedule)
- Convenient user and group administration: synchronizing between NT/2000 users and user groups and those using DocuWare
- General file cabinet access rights can be assigned by user and group
- Document level security rights depend on the database field content. Selected users are refused access to document if database field does or does not contain certain entry

- Functionality can be customized for user groups, based on whether they need to scan, store, retrieve, print, e-mail, etc.
- File cabinet accesses are logged, e.g., to record accesses for cost accounting in text or dBASE files

Copyright Protection/ Document Authenticity

- Scanned documents are marked in the database as "copyright protected"
- Prevents simultaneous access to copyright-protected documents
- Restricted printing of copyright-protected documents to single pages

Security

- Double data: Additional storage of database entries directly with document files
- Automatic recovery of defective database by using data in document files
- Filed documents are safeguarded against tampering by encrypted check sum
- Added security in conjunction with commonly used backup tools

System Requirements

- Network workstation: min. PC Pentium with 32MB RAM for Windows 98, Millennium, 64 MB for Windows NT, 2000 or 128 MB for Windows XP
- Network Server for program files and documents: Novell, Windows NT/2000, Linux
- Database Server: Requirements depend on the number of DocuWare users and the amount of data and documents. Min. requirements for the integrated Microsoft SQL Server are: Pentium 200 Mhz, 256 MB RAM, min. 10 GB hard disk, Windows NT Server plus Service Pack 5+ or Windows 2000 Server, MS Internet-Explorer 5.0+
- Memory requirement for program files: approx. 95 MB (approx. 100 MB for installation of add-on modules) on the network server and approx. 5 MB locally. When installing with local copy approx. 65 MB are needed locally (approx. 70 MB for installing add-on modules). Single client workstations need 75 MB

- Memory requirements for documents: approx. 50 KB per b&w letter-size page. Accordingly, storage space has to be scheduled for file cabinets on the server as well as for baskets and the local workstation

Requirements for Full-Text Indexing

- Only for file cabinets housed on the MS SQL Server integrated in DocuWare
- The index service requires a Windows NT/2000/XP workstation or server computer
- Additional necessary memory on a server: 128 MB RAM
- Recommended processor: min. 400 MHz, Pentium 3
- Additional hard disk capacity on the database server: varies based on document type and size; per average letter-size page: approx. 5 KB
- If the index service does not run on the database server, an additional SQL license is required