DocuWare

The DocuWare Platform

Content services for document management
and workflow automation

DocuWare

Everything you need for successful office automation

DocuWare is a state-of-the-art platform that allows you to manage, process and utilize business information – centrally, quickly and effectively. The comprehensive capabilities and functions of our document management and workflow solutions can be integrated into any IT system to digitize manual or paper-based business processes from any department.

Boost your company's productivity and make every day work easier for your teams. Get started with DocuWare and see for yourself.
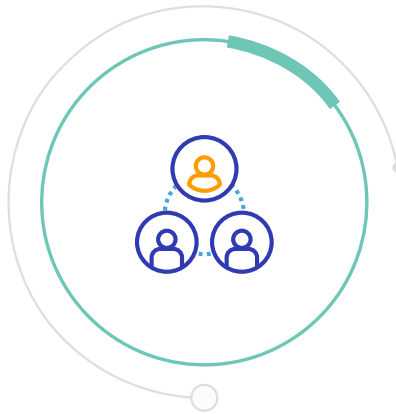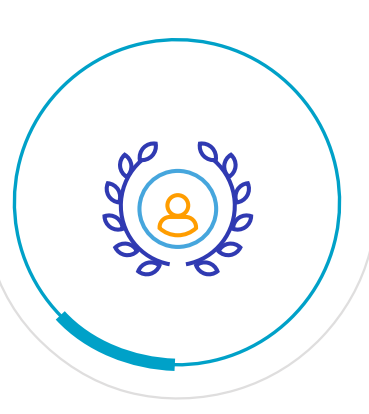
A comprehensive range of functions and excellent user comfort
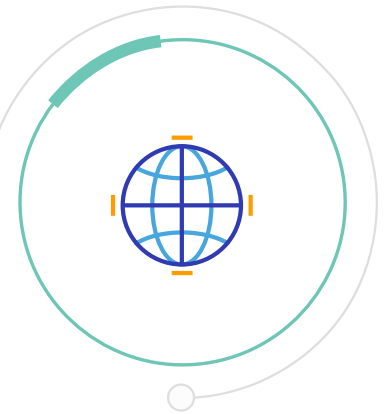
Maximum stability and performance with low maintenance requirements

Available as a cloud, on-premises or hybrid solution

Multiple awards and certifications

Used by more than 12,000 companies in 90 countries

DocuWare leads the way
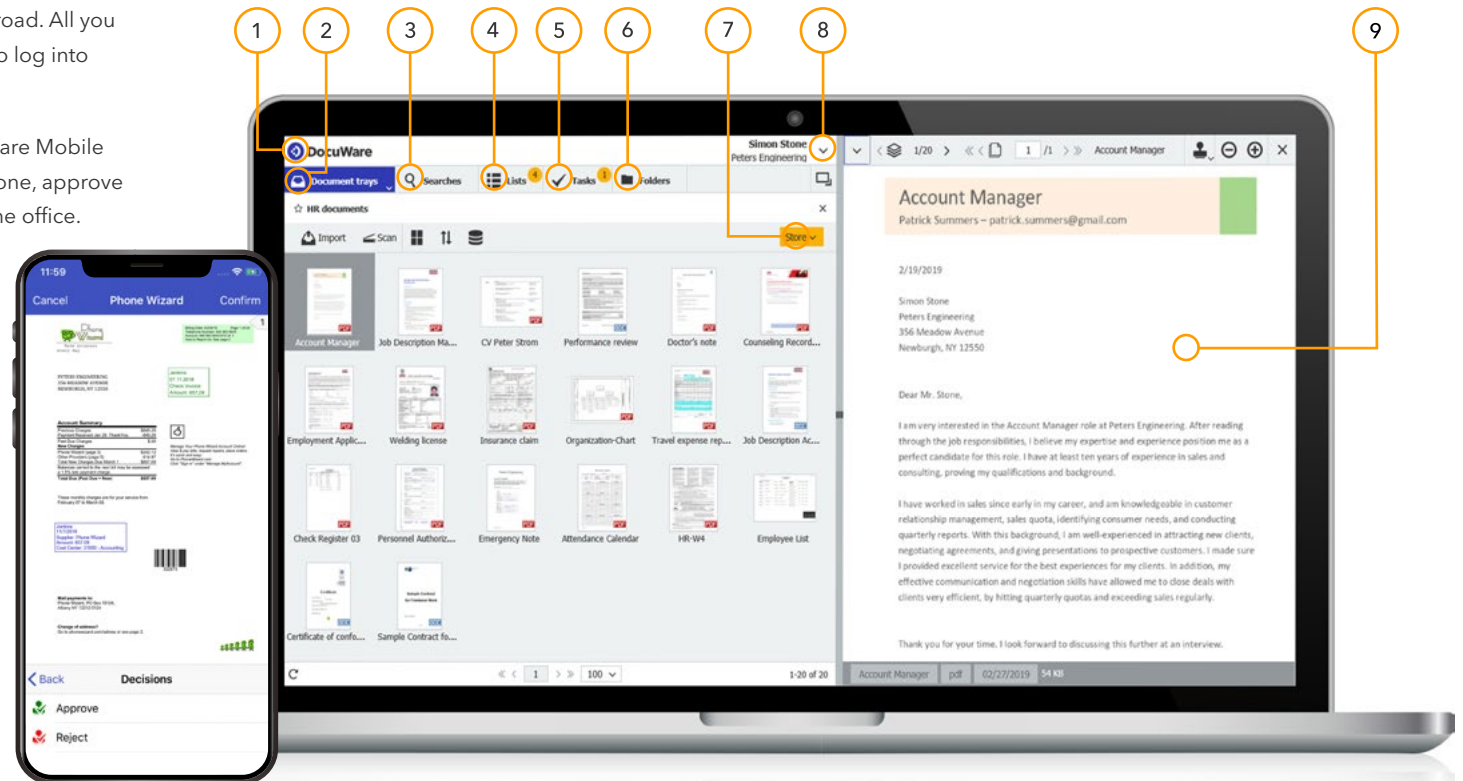
The DocuWare Client in overview

The DocuWare Client is where you will complete most of your document-related work. Switch between your work areas to archive, find and edit documents. Numerous functions and automated processes help you perform all your tasks quickly and in a structured way. You can also open the configuration manager directly from the DocuWare Client, allowing you to customize applications or add new ones.

Independent, mobile working

Access the information you need anytime, anywhere. Stay part of the ongoing workflow and keep working on your tasks from home or on the road. All you need is the browser of your choice and an internet connection to log into DocuWare.

Switch to touch mode for working on a tablet or use our DocuWare Mobile App for iOS or Android to retrieve information on your smartphone, approve documents or perform any other tasks when you're away from the office.

1. Open DocuWare in your browser

2. Capture and pre-sort documents

3. Find information quickly

4. Organize daily office tasks

5. Perform workflow tasks and collaborate productively

6. Use folder structures for projects

7. Index and securely archive documents

8. Menu to adapt and extend fuctions

9. View, edit, annotate and share documents

Features and capabilities

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Collect and organize information

Access, display and edit content

Process documents and control workflows

DocuWare within your IT ecosystem

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Integrate with SAP, Teams, Outlook and hundreds of other applications

Highest security standards

Flexible deployment options

01

Collect and organize information

Bring together all of the information that is necessary for your business processes on a central platform. Invoices, delivery notes, application forms, project plans or presentations — all document types and formats are welcome in DocuWare. Automated import and indexing functions ensure immediate availability, fast workflows and full productivity.

File cabinets as a central information platform

Store scans, Microsoft Office documents, PDFs, ERP records, web forms and email together in easily searchable file cabinets and access them instantly from any device. Bundle information in a structured way and create file cabinets for any business area, such as accounting, personnel files, sales and marketing. Intelligent indexing, full-text indexing and sorting capabilities give authorized users the right information in the blink of an eye. Parallel searches in several archives are possible.

User-specific dialogs for storing, searching and results

When storing in a file cabinet, each document is enriched with structured index data. Use a simple modular system to define which index fields and dialogs you want to use. Configure individual dialogs for storage, search and result view and assign them to individual users or user groups. So everyone has exactly the user interface they need to manage their specific tasks.

Document capture from all sources

Capture and classify paper documents directly by scanning. For files, PDFs and email, use Import, Drag & Drop or a straight command in the relevant enterprise application. Store documents directly in a file cabinet without user action or capture scans and files first in a digital document tray.

A document tray in DocuWare is a temporary storage that can be used alone or together to view, staple and sort documents before they are archived. Documents are archived in their original format or as PDF/A files.
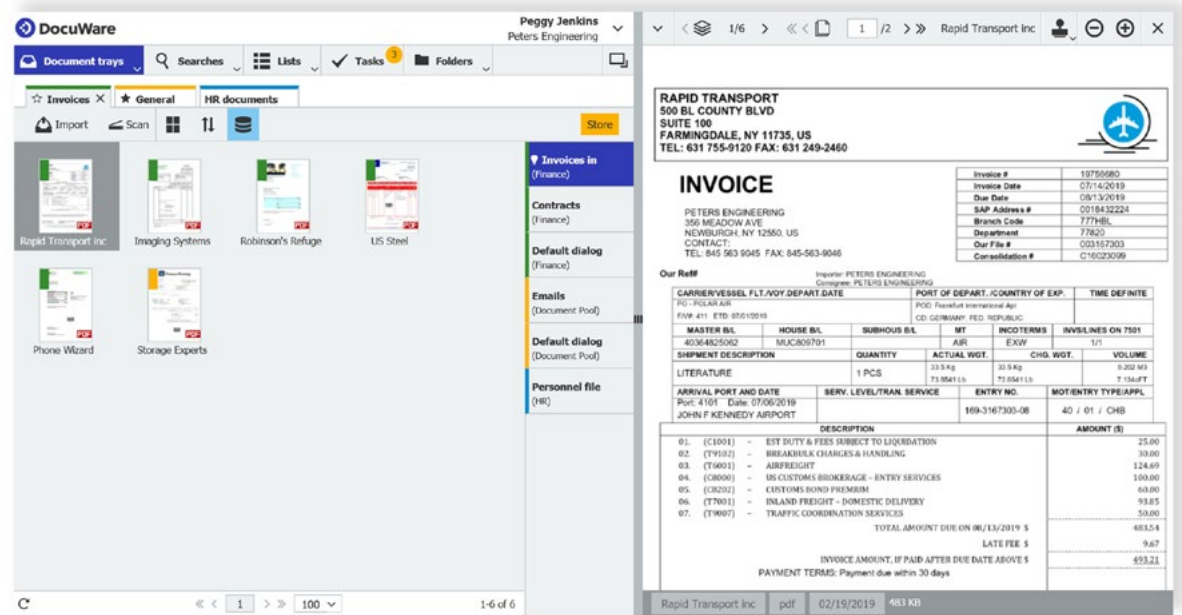
Before securely storing documents in digital file cabinets, simply import, scan or drag and drop them into digital document trays.

Indexing without manual data entry

DocuWare turns document capture into a highly efficient process by automatically reading document content, for example for a full-text index, or importing index information from external sources such as text files, databases or address books. The methods for enriching documents with correct index date are as varied as effective:

Machine learning

Intelligent Indexing automatically recognizes key information in documents and uses it to fill the fields of a store dialog. As soon as you correct an index value, the machine learning service learns from your feedback and the indexing quality increases with each additional document.

Content transfer by marking

With the **One Click Indexing** function, you mark a term, date or amount within a document opened in DocuWare Viewer to promptly fill the content into an index field. So even complicated invoice or IBAN numbers can be entered effortlessly.

Import from print stream

With the universal **DocuWare Printer,** you can import documents into DocuWare from almost any application using a print command. For standardized documents such as outgoing invoices, DocuWare Printer automatically identifies storage criteria such as customer number, date and contact for indexing.
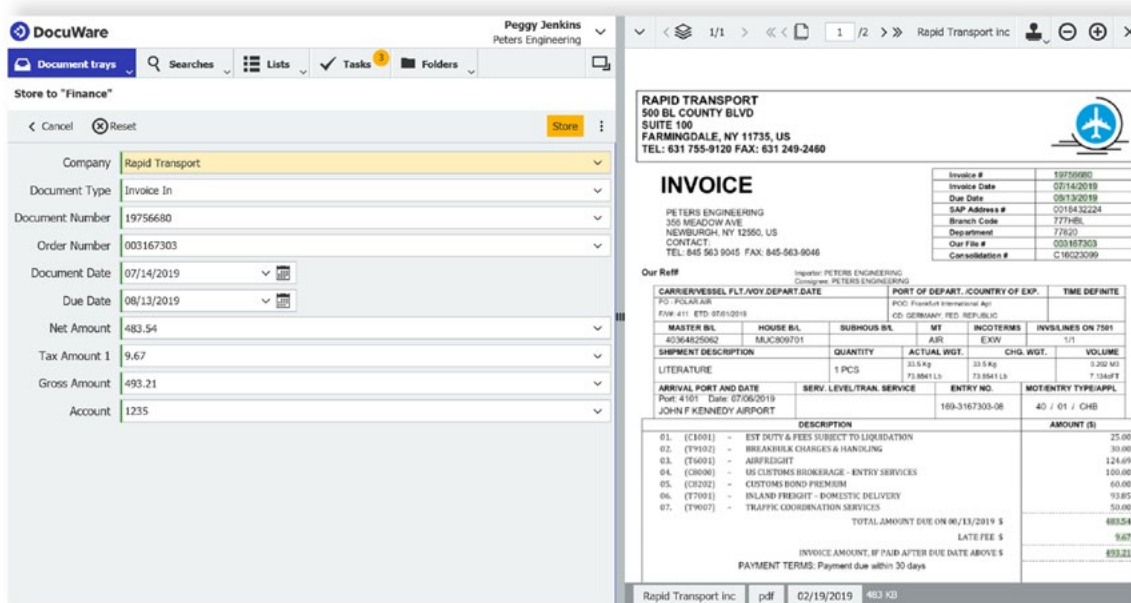
File import with monitored folders

DocuWare Import instantly brings documents such as scanned invoices or PDFs from your ERP system into DocuWare. As soon as they are stored in a defined folder of your file system, DocuWare Import archives them automatically using specific metadata. In addition, module **Barcode & Forms** reads barcodes to sort, separate and index scanned documents.

Data synchronization

Autoindex retrieves information from external data sources and uses it to enrich data records in DocuWare. Find out more about Autoindex under Integration on page 17.

No manual data input necessary. Intelligent Indexing automatically extracts index values and completes the fields of a filing dialog.

Connection to your email client

Email messages often contain key information that is essential for making your decisions. Manage your email along with associated business documents and make them available to all authorized colleagues. DocuWare collects email and attachments individually or together from any clients. Archived email are flagged appropriately and can be answered or forwarded directly from DocuWare in your local email application, such as Microsoft Outlook.

Email from Outlook

Import email and attachments from Outlook into DocuWare or start a search in the secure archive directly from the mailbox. **Connect to Outlook** enables you to seamlessly integrate DocuWare into Outlook. At the time of storage index values such as sender, subject and email address are automatically taken from the email information. Personal and company names can be added from external sources such as address books or CRM.

Email from other accounts

Save email from Google, Yahoo, Web.de and many other webmail clients with **Connect to Mail** securely in DocuWare and retrieve all documents relating to a project at the same time – not only email but also sketches or contracts, for example. DocuWare monitors a folder in your email client, imports the incoming messages into the archive and enriches them with the necessary index data such as sender or subject.
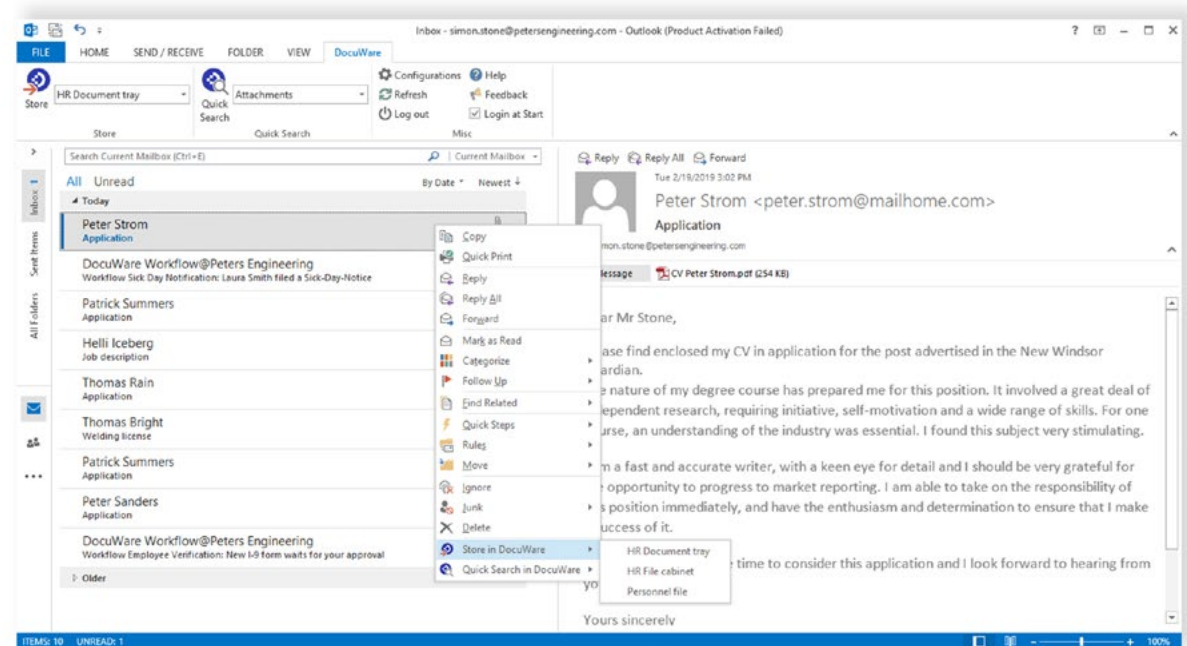
DocuWare integrates seamlessly into Outlook. You can store or search for email in the DocuWare ribbon or via context menus.

Web forms for data capture

Create web-based forms and share them via URL to capture information quickly, easily and legibly. Even people who have no access to your DocuWare system can fill out the forms on any device and transfer them directly to DocuWare by submitting them. The delivered data can then be used to trigger business processes directly or be imported into other programs such as your ERP or CRM.

DocuWare Forms allows you to create web-based forms with no programming required to quickly process applications, orders or registrations. Or enable integrated HR services on your intranet by including forms for vacation or sick leave requests that are immediately processed in the DocuWare workflow.

Easily create and publish web-based forms with an intuitive editor. No programming skills are necessary. Published forms can be opened, filled and submitted in any browser on any device.

02

Access, display and edit content

To carry out and complete your tasks effectively, you need to have the required information on hand.

DocuWare provides your teams with comprehensive picture about a customer, project or business process within seconds.

Flexible search

Enter individual search terms or select keywords from dropdown lists, use place-holders and logical links, and search the document content as well as the index data. The result is immediately available as a list that you can sort as you wish. Related documents are linked to one another as needed.
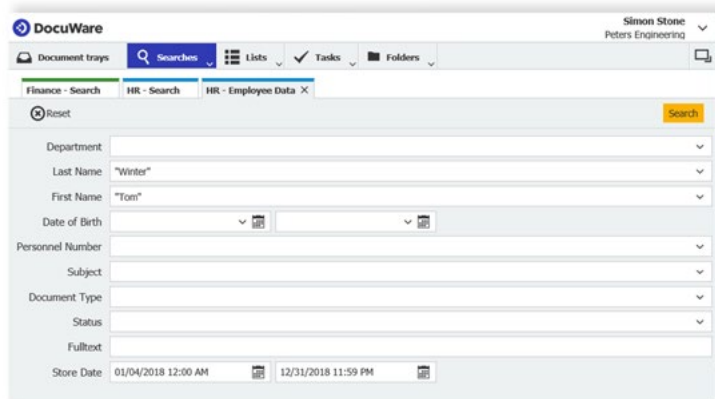
Flexible keyword search: all personnel documents for an employee from a specific period.
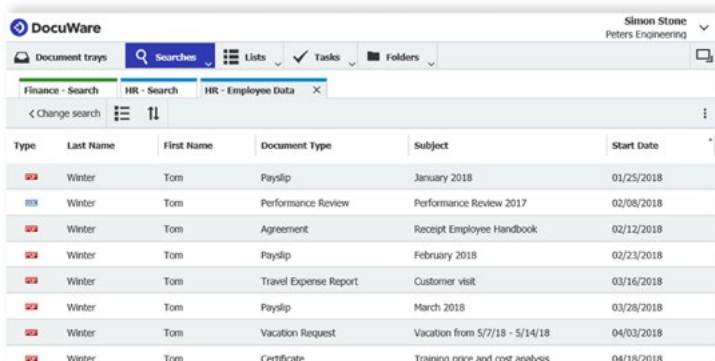
Quick search result: all personnel documents for the employee in one overview, sorted by date.

Folder view

If you also prefer to sort your documents into folders, you can easily do that with DocuWare. Map your documents in any folder structure and work with multiple project files at the same time, each containing the same version of a document without multiple occurrences.
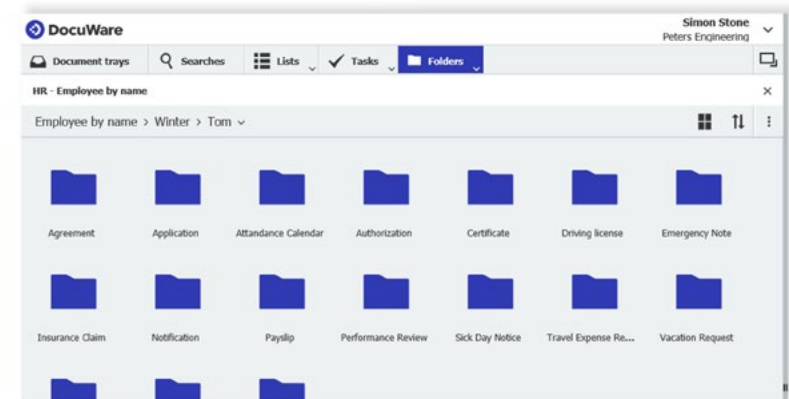
Intuitive search via folders: all document types found in an employee's personnel file.

Search from other programs

Maximum efficiency can be achieved by integrating the powerful DocuWare search function directly into other programs. For example, you can access invoices and delivery notes directly from ERP, personnel files directly from your HR software, customer correspondence from CRM, or archived emails and related information from Outlook.

Display

In the DocuWare Viewer, you can open documents via any browser on Mac, PC or Linux, regardless of the program used to create them. Page through the document, rotate or zoom the pages, or copy text to the clipboard. Numerous editing functions are also available.

Editing
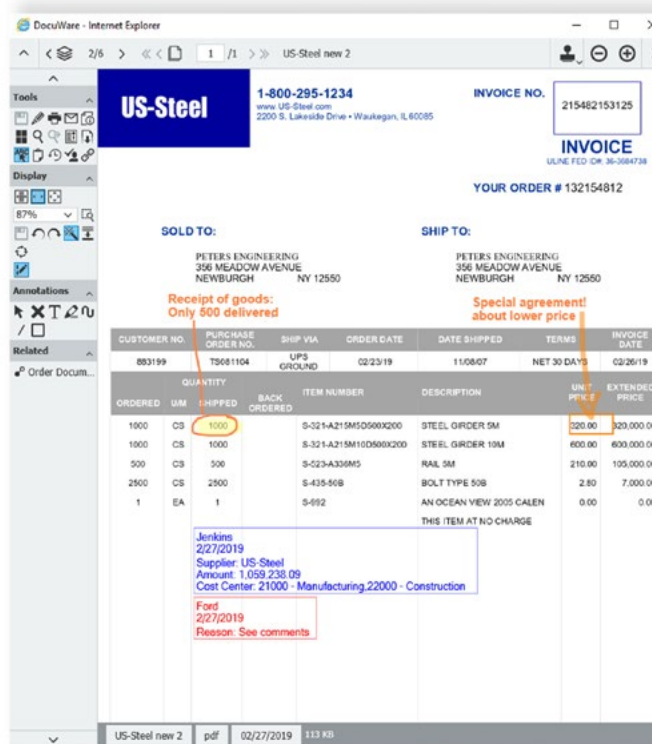
Attach notes, comments or stamps to documents or highlight important content. The document itself remains unchanged by the overlay technique. Alternatively, open and edit documents in the original program and save them directly back into the archive. Depending on the setting, DocuWare automatically creates a new version.

Share information

Download documents, print them out and forward them in an email that opens directly from within DocuWare. Or send and share links to individual documents or lists, instead of large email attachments. This also ensures that only those who are authorized to view the content can access it.

Standalone archive

Assemble documents specifically or select entire file cabinets with **DocuWare Request** to provide them to auditors, external staff or other service providers. With the integrated browser, they can search for and view documents — without DocuWare or other additional software.

The DocuWare Viewer toolbar offers numerous functions for convenient viewing and editing documents. Digital stamps and annotations make decisions easy to track.

03

Process documents and control workflows

A smooth flow of information is the foundation of every productive process. Automate any document-based task, from efficient resubmission to complex approval workflows, and keep your teams working across organizations and departments without obstacles.

Task Management with Lists

Simplify and accelerate recurring tasks with notifications and lists that automatically aggregate current information. Lists in DocuWare update as soon as, for example, a new delivery note arrives or if a contract expires within the next 12 weeks.

This ensures that you keep sight of the latest developments and deadlines. Simple information processes in the team can be organized efficiently with the DocuWare **Task Manager**.
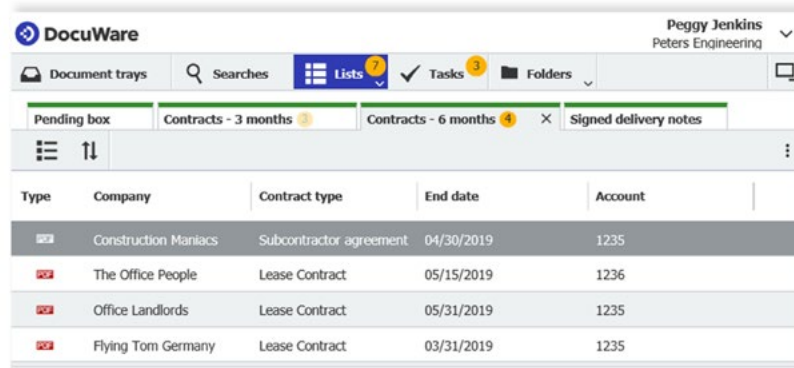
Digital lists keep you on track, giving you a well-organized overview of your pending tasks right on your desktop.

Workflow Manager for complex processes

Business processes with branched decision points and multi-level if-then rules can be controlled with DocuWare **Workflow Manager**. Automate comprehensive and complex business processes in invoice processing, HR or sales through an intuitive visual designer and define what should happen when certain document processing situations occur. Install automated control and calculation functions, organize tasks in parallel, configure conditions, set deadlines, appoint representatives and limit the scope of action of individual agents or user groups individually.

The task to be performed automatically appears in your DocuWare tasks, which you can also carry out on the move without restrictions.
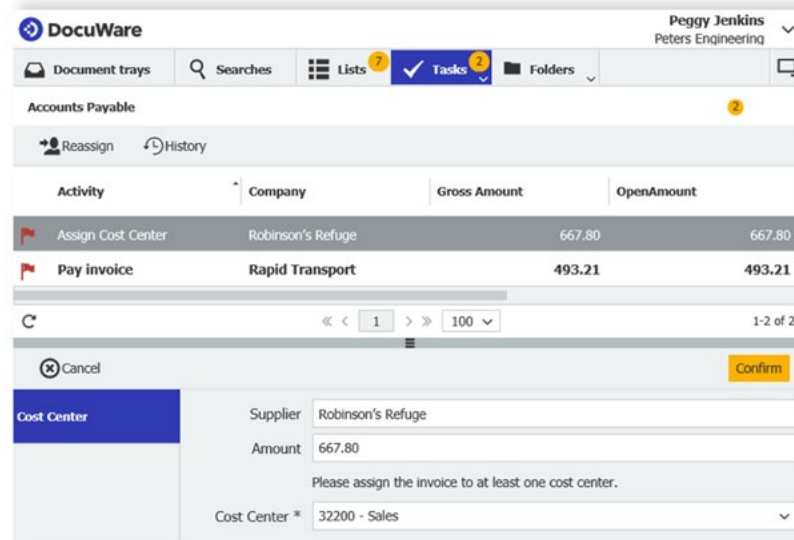
All pending workflow tasks are shown in lists that update automatically. Use stamps and data fields to initiate next steps and add context to a document.

WHAT OUR CUSTOMERS SAY ABOUT DOCUWARE

"Managers in our satellite stores did not have the ability to research prices and even those at the headquarters store were limited in the amount of cost research they could do with a paper system. DocuWare is a game changer. It has empowered our employees with the research tool they needed and helps them negotiate the best possible price."

MIKE DECIUTIIS

DIRECTOR OF IT, ADAMS FAIRACRE FARMS

"We've eliminated a couple of hours per employee per week by getting rid of manual, paper processes. It's hard to quantify how many hours we've saved but the bigger benefit is that we've been able to add more stores and grow our business without adding operational costs such as more staff in accounting."

SEAN PENNER

CFO, CARUBBA COLLISION

"If we were still manually indexing information in tract books, we would not be able to keep up with the volume of information we receive. DocuWare has improved our efficiency and allows us to effortlessly keep up with volume of documents we receive from the courthouses to add to our database."

VAN WINTON

PRESIDENT AND OWNER, COMMUNITY TITLE & ESCROW

04

Integrate with SAP, Teams, Outlook and hundreds of other applications

DocuWare is designed to connect with any application within your IT ecosystem. Stable integration with CRM, ERP or HR systems makes it possible to digitize processes without interruption and keep data synchronized. This ensures you get the information you need quickly and securely, regardless of what program you use to create, receive and process content.

From simple step-by-step configurations to custom programming, DocuWare offers numerous ways to seamlessly communicate with other applications. It makes no difference whether these methods are deployed locally or in the cloud.

Data exchange in any direction

Extensive information for index and workflow actions is already available in your IT system. Import the data into DocuWare with **Autoindex** and eliminate annoying manual entries, for example by automatically filling your ERP with data from invoice processing during posting. DocuWare Autoindex can access various data sources, a database or a limited database view, a DocuWare file cabinet or a simple CSV file.

User interface screening

Access archived documents from any program with just one click. DocuWare **Smart Connect** reads predefined content from program interfaces and uses it for searching or indexing. For seamless document access and targeted information, an overlay field is displayed in the application. Configure the required settings in just a few steps. Programming is not necessary.

URL integration

Create URL links to DocuWare elements such as search fields and lists and embed them in any application or in your intranet for quick information.

Platform Service

Use the REST-based gateway to DocuWare for custom programming. For example, integrate DocuWare archives across any platform via XML or JSON, integrating them into the program code of a third-party application.

Connect-to modules

Seamlessly integrate **SAP, Teams, Outlook** and many other mail services with powerful connector modules.

DocuWare *Document* Index data from document · Index data from record · Index data from document · Index data from record · *Database record* *Database*
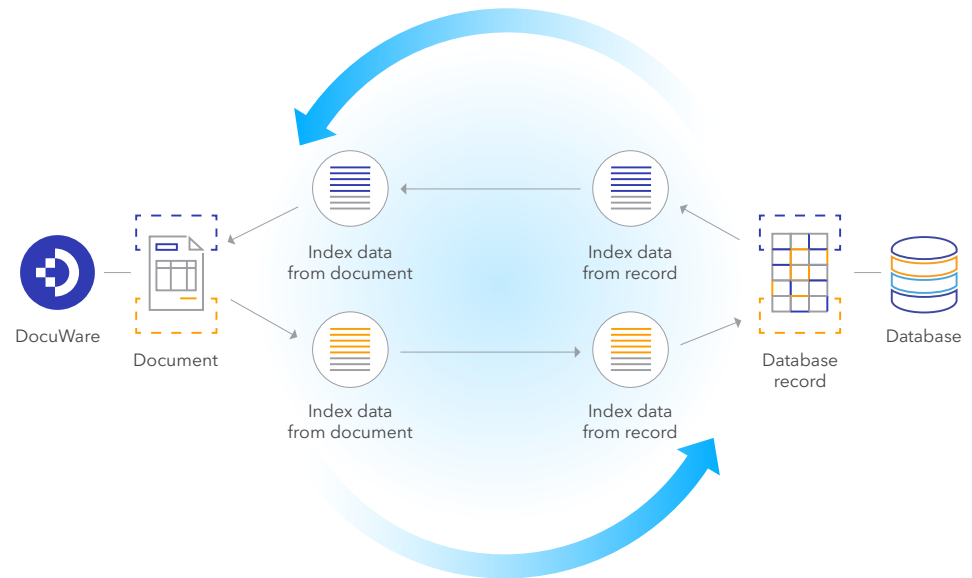
Productive circle: DocuWare gets index data from an external data source and enriches automatically the archived documents. Conversely you can use DocuWare data to populate your other systems.

05

Highest security standards

The DocuWare platform offers a sophisticated digital infrastructure to ensure the confidentiality, integrity and availability of information. Control what happens to your documents and data and rest assured that they will be captured, processed and stored safe from misuse or loss.

Business continuity

Make sure that business-critical data and documents can be restored in the event of a hardware crash or natural disaster. Maximum availability and reliability are guaranteed by DocuWare as a cloud solution. Based on Microsoft Azure, all data are AES encrypted, stored in high-performance data centers in the EU or the US and mirrored three times. DocuWare supports common databases and associated backup technologies for on-premises solutions. DocuWare services can be installed on multiple server computers in parallel for enhanced load distribution and reliability.

Secure from loss

Documents archived in DocuWare do not disappear into the wrong files, chaotic file directories, or personal email accounts. Central archiving with structured index data combined with powerful full-text indexing ensures that information is always reliable and complete. Even cryptoviruses have no chance of rendering information unusable in DocuWare. Because of the carefully designed architecture, even an infected client machine cannot cause any damage to the archive during document access.

Access rights

Give your employees the exact rights they need for their respective tasks and control who is allowed to see, edit, export and delete which documents and in which context. For easy implementation, DocuWare provides predefined groups, roles and profiles that you assign to each user. Highly confidential data can also be encrypted so that even the system administrator cannot access it.

Role

Functional Profiles

File Cabinet Profiles

User

User Groups
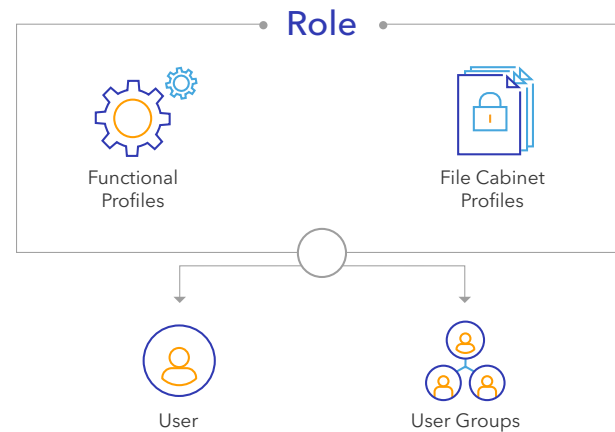
Traceability and data protection

Meet compliance requirements such as HIPAA, Sarbanes-Oxley or the GDPR. DocuWare offers reliable procedures to ensure the integrity of your business information. Powerful logging and analysis functions give you control over document versions, changes, and workflows. A sophisticated rights structure, secure data capture, clearly controlled processes and unchangeable system entries protect against document loss, abuse and manipulation.

06

Flexible deployment options

Use DocuWare as a SaaS cloud service, traditional on-premises software or distributed across a hybrid setup — with no compromise on system features or capabilities.

Preconfigured cloud solutions enable you to start digitalizing central business areas straight away.

DocuWare Cloud

With DocuWare Cloud, you get full use of our content services as an uncom-promising SaaS solution, without worrying about server hardware, complex IT responsibilities or high initial investment.

DocuWare Cloud is available with flexible licenses for different sizes of enterprise and offers you maximum security, scalability and availability. Automatic updates and backups ensure that your system is always up to date. Every subscription includes the full range of features, including Intelligent Indexing, Workflow Manager, DocuWare Forms and all other applications. You only have to decide how many user licenses and how much storage you need.

Preconfigured cloud solutions

Very fast, targeted entry into office automation is made possible by our pre-configured solutions for specific teams or key applications such as invoice processing or digital files and workflows in personnel management.

Instead of planning the digitization of these processes yourself and configuring an "empty" DocuWare system, you start with a best practice solution based on DocuWare Cloud that you can adapt to your own requirements in just a few steps. Implementation usually takes no longer than a few days. With every preconfigured solution you get the full range of DocuWare Cloud services.

DocuWare as an on-premises solution

If your business has strong IT resources of its own, it may make sense to deploy and maintain your document management and workflow solution with other applications in your own data center. DocuWare supports Microsoft SQL, MySQL, and Oracle databases in multiple load-sharing configurations.

Depending on the requirements and size of your enterprise, choose the right server license for you and expand the included standard functions with additional modules if required.

Cloud, on-premises and hybrid

A hybrid model is another possibility, combining services in the cloud with local on-premises software.

For example, DocuWare Cloud can be used as document storage backup for a local system, or an on-premises system can use Intelligent Indexing in the cloud, or a DocuWare Cloud deployment can integrate with an on-premises ERP.

Information moves smoothly and seamlessly without compromising productivity.

Summary of the functions

DocuWare maintains core feature parity across cloud and on-premises deployments. All document management and workflow automation capabilities are available in DocuWare Cloud and when DocuWare is delivered on-premises.

Central functions	DocuWare Cloud	DocuWare on-premises
Standard capture: scan, import, print, drag & drop	✓	✓
One Click Indexing	✓	✓
Full-text Index	✓	✓
Self-learning, automated indexing	✓	+ Intelligent Indexing
Capture and index by folder monitoring	✓	+ DocuWare Import
Web forms for data collection	✓	+ DocuWare Forms
Integrated email capture	✓	+ Connect to Outlook, Connect to Mail
Read barcodes	✓	+ Barcode & Forms
System-independent access via any web browser	✓	✓
Search via keywords, full-text, folder structures	✓	✓
Access via mobile app	✓	+ DocuWare Mobile
Editing with and without changing the original; versioning	✓	✓
Task management with lists and rule-based notifications	✓	+ Task Manager
Multi-level, comprehensive process automation	✓	+ Workflow Manager
Information and participation in workflows via mobile app	✓	+ DocuWare Mobile
Easily configurable search field integration into any application	✓	+ Smart Connect
Automated data synchronization and exchange with other applications	✓	+ Autoindex
Integration via URL or programming	✓	✓
Integration with SAP	+ Connect to SAP	+ Connect to SAP

WHAT OUR CUSTOMERS SAY ABOUT DOCUWARE

"Moving from a pure archive solution to an integrated workflow-based document management system has been an incredible improvement for our organization. As a result, we have significantly improved processing times and the quality of service provided by our group."

BERT VAN OS

OPERATIONS MANAGER, HB MUNTERS GROUP

"As we look to the future, we know that more and more of our business-critical information will be stored in DocuWare. We are already seeing the positive results from bringing in DocuWare as a key element in our IT environment."

MOLLY MALONE

MANAGER SYSTEMS ANALYSIS AND PROGRAMMING, CABOT OIL & GAS CORPORATION

"We chose to implement DocuWare Cloud to avoid taxing our internal IT staff and be able to quickly deploy and implement the solution to the corporate office as well as 30 remote locations. Implementing a cloud system was the quickest way to get something in place and have it be as seamless and easy to use as possible."

EMILIA O'BRIEN

ACCOUNTING MANAGER, CULINAIRE INTERNATIONAL

BECOME PART OF THE DOCUWARE COMMUNITY

More than 500,000 users worldwide rely on our solutions to dynamically organize their business processes, collaborate more effectively and secure their data and documents.

We are grateful for this trust and eager to support all of our customers with the best information and services. Whether you are starting out with DocuWare or an experienced user looking to try out new applications: we are always here for you and ready to answer your questions.

Learn more: docuware.com

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