



PRICING: DocuWare Document Management Software PREMISE

Description	QTY	Price
<i>DocuWare Professional is a flexible server software for mid-sized organizations. One End-User Organization per DocuWare System. Unlimited file cabinet size. Includes Web Client Server for "thin client" technology. Requires at least 1 client license. Features are expandable with DocuWare's Add-On Modules. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.</i>		
DocuWare Professional Server	1	\$ 6,145.00
DocuWare Professional Server M&S	1	\$ 1,050.00
<i>DocuWare Client Licenses allow concurrent user access while still allowing unlimited user names and security profiles in the system to reduce the licensing need – A concurrent license may also be allocated to two dedicated "always-on" named users (often desirable if particular user(s) are always logged in ex. they utilize SmartConnect buttons. For all DocuWare systems, a discount applies to license purchase as the systems license count increases as show below.</i>		
DocuWare 1-4 Client License	1	\$ 900.00
DocuWare 1-4 Client License M&S	1	\$ 185.00
DocuWare 5-9 Client License	1	\$ 865.00
DocuWare 5-9 Client License M&S	1	\$ 180.00
DocuWare 10-19 Client License	1	\$ 840.00
DocuWare 10-19 Client License M&S	1	\$ 170.00
DocuWare 20-29 Client License	1	\$ 800.00
DocuWare 20-29 Client License M&S	1	\$ 160.00
DocuWare 30-49 Client License	1	\$ 775.00
DocuWare 30-49 Client License M&S	1	\$ 155.00
DocuWare Site License (Unlimited Concurrent User Access)	1	\$ 45,000.00
DocuWare Site License (Unlimited Concurrent User Access) M&S	1	\$ 9,000.00
DocuWare Thin Client Unlimited Read-Only License (Unlimited Read-Only Users)	1	\$ 9,600.00
DocuWare Thin Client Unlimited Read-Only License (Unlimited Read-Only Users) M&S	1	\$ 1,950.00
<i>Additional features available for the DocuWare Professional Edition are available as add-on modules listed below.</i>		
DocuWare Smart Connect	1	\$ 1,950.00
DocuWare Smart Connect M&S	1	\$ 390.00
DocuWare Connect to Outlook	1	\$ 1,950.00
DocuWare Connect to Outlook M&S	1	\$ 390.00
DocuWare Mobile	1	\$ 1,190.00
DocuWare Mobile M&S	1	\$ 250.00
DocuWare Task Manager	1	\$ 3,860.00
DocuWare Task Manager M&S	1	\$ 765.00
DocuWare Auto Index	1	\$ 2,525.00
DocuWare Auto Index M&S	1	\$ 500.00
DocuWare Workflow Manager	1	\$ 9,590.00
DocuWare Workflow Manager M&S	1	\$ 1,920.00
DocuWare Barcode and Forms	1	\$ 3,860.00
DocuWare Barcode and Forms M&S	1	\$ 765.00
DocuWare Import	1	\$ 1,950.00
DocuWare Import M&S	1	\$ 390.00
DocuWare Connect to Mail	1	\$ 1,950.00
DocuWare Connect to Mail M&S	1	\$ 390.00
DocuWare Intelligent Indexing Premise Module	1	\$ 9,590.00

DocuWare Intelligent Indexing Premise M&S	1	\$ 1,925.00
DocuWare Intelligent Indexing Subscription per month (alternative to premise module) Up to 2500 documents per month	1	\$ 100.00
DocuWare Intelligent Indexing Subscription per month 500 document count increase	1	\$ 20.00
DocuWare Connect to Sharepoint	1	\$ 3,850.00
DocuWare Connect to Sharepoint M&S	1	\$ 765.00
DocuWare Connect to SAP	1	\$ 9,595.00
DocuWare Connect to SAP M&S	1	\$ 1,920.00
DocuWare Connect to MFP (option for Ricoh, Toshiba, Sharp, Xerox, OKL)	1	\$ 1,105.00
DocuWare Connect to MFP M&S	1	\$ 250.00
DocuWare Incoming Fax License	1	\$ 545.00
DocuWare Incoming Fax License M&S	1	\$ 115.00
DocuWare Deficiency Manager	1	\$ 6,800.00
DocuWare Deficiency Manager M&S	1	\$ 1,360.00
DocuWare Process Server	1	\$ 6,800.00
DocuWare Process Server M&S	1	\$ 1,360.00
DocuWare Stapler	1	\$ 3,740.00
DocuWare Stapler M&S	1	\$ 750.00
DocuWare Remote Capture	1	\$ 3,740.00
DocuWare Remote Capture M&S	1	\$ 750.00
DocuWare Notification Management	1	\$ 3,740.00
DocuWare Notification Management M&S	1	\$ 750.00
DocuWare Web Client Integration	1	\$ 3,740.00
DocuWare Web Client Integration M&S	1	\$ 750.00
DocuWare SDK Support (includes access to SDK)	1	\$ 2,000.00
DocuWare Software Escrow (per year)	1	\$ 150.00
DocuWare MS SQL 2012 Runtime for DW Client	1	\$ 182.00
DocuWare MS SQL 2012 Runtime for DW 2-core	1	\$ 2,590.00
DocuWare MS SQL 2014 Runtime for DW Client	1	\$ 182.00
DocuWare MS SQL 2014 Runtime for DW 2-core	1	\$ 5,180.00
DocuWare Enterprise Server	1	\$ 16,000.00
DocuWare Enterprise Server M&S	1	\$ 3,500.00
<i>The Professional Services Group offers a variety of services to fully support your implementation projects or to augment the services of your own Professional Services team. Professional Services are available as both remote and onsite offerings.</i>		
Per Diem On Site Services	1	\$ 1,600.00
Per Diem Remote Access Services	1	\$ 1,250.00
Four Hour Remote Access Service Block	1	\$ 700.00
Per Diem Custom Development Services	1	\$ 1,800.00
Per Diem Custom Development Services Maintenance & Support	1	\$ 360.00
Per Diem Data Conversion Services	1	\$ 1,800.00
Custom SQL Scripting (4 hour Increments)	1	\$ 900.00
Custom SQL Scripting (4 hour Increments) Maintenance & Support	1	\$ 180.00
Per Diem Third Party Professional Services	1	\$ 1,800.00

Sample Pricing Scenario: DocuWare PREMISE

This is a sample scenario in which a school would like to scan their student records and meeting minute files into two virtual file cabinets (“student records” and “meeting minutes”). The pricing sample includes **1.** Necessary licenses to install on the customer supplied server/infrastructure **2.** Discovery (outlining the structure and scanning/import procedure for the virtual file cabinets **3.** Installation and configuration **4.** Training and go-live support

Licensing for system access in this sample includes the core server software “DocuWare Professional” and up to three concurrent users. This allows an unlimited number of log-in credentials and user security profiles with up to three people actively naming and searching for documents in the system at the same time.

Solution Components	
<i>Monthly options are all \$1 buyout leases (you own at end)</i>	
Description	QTY
DocuWare Professional Server - Core server software	1
DocuWare Client License - Concurrent user access license (allows unlimited user names) – A concurrent license may also be allocated to <u>two</u> dedicated “always-on” named users	3
Configuration & Training 1. Full process discovery 2. Creation specification document 3. Build/configuration of solution as per agreed upon specification . Beta go-live, support, and feedback process with beta users 5. System refinement as per beta go-live 6. Go-live support	1
1 Payment Purchase - Includes support through year 1 = \$13,180 Or 36 monthly payments - Includes support through year 1 = \$430/month Or 48 monthly payments - Includes support through year 1 = \$335/month Or 60 monthly payments - Includes support through year 1 = \$280/month	

Maintenance & Support

Please note: Support cost are **included through year 1 and are subject to 5% yearly escalation.*

*Solution components support = \$1860**

PRICING: DocuWare Document Management Software CLOUD		
Description	QTY	Price
<i>DocuWare Cloud presents the same user experience as the flexible premise server software counterpart while maintaining a cloud SaaS pricing and implementation model</i>		
DocuWare Cloud Flex - Contains all essential functionality including intelligent indexing service. Includes 4 named user licenses and 20GB of document storage. Must be paid in advance per year	1 month	\$ 300.00
DocuWare Cloud Flex Additional Named License	1 month	\$ 50.00
DocuWare Cloud Flex Additional 10GB Storage	1 month	\$ 14.00
DocuWare Cloud Professional - Contains all major features of DocuWare including intelligent indexing service. Includes an unlimited number of users and 50GB of document storage. Must be paid in advance per year	1 month	\$ 750.00
DocuWare Cloud Professional Additional 1GB Storage	1 month	\$ 8.40
DocuWare Cloud Enterprise - Same feature set as Cloud Professional but includes a total of 250GB document storage	1 month	\$ 1,500.00
DocuWare Cloud Enterprise Additional 1GB Storage	1 month	\$ 4.20
<i>The Professional Services Group offers a variety of services to fully support your implementation projects or to augment the services of your own Professional Services team. Professional Services are available as both remote and onsite offerings.</i>		
Per Diem On Site Services	1	\$ 1,600.00
Per Diem Remote Access Services	1	\$ 1,250.00
Four Hour Remote Access Service Block	1	\$ 700.00
Per Diem Custom Development Services	1	\$ 1,800.00
Per Diem Custom Development Services Maintenance & Support	1	\$ 360.00
Per Diem Data Conversion Services	1	\$ 1,800.00
Custom SQL Scripting (4 hour Increments)	1	\$ 900.00
Custom SQL Scripting (4 hour Increments) Maintenance & Support	1	\$ 180.00
Per Diem Third Party Professional Services	1	\$ 1,800.00

Sample Pricing Scenario: DocuWare CLOUD

This is a sample scenario in which a school would like to scan their student records and meeting minute files into two virtual file cabinets (“student records” and “meeting minutes”). The pricing sample includes **1.** Cloud Subscription to “DocuWare Flex” **2.** Discovery (outlining the structure and scanning/import procedure for the virtual file cabinets) **3.** Installation and configuration **4.** Training and go-live support

Licensing for system access in this sample includes the cloud service software “DocuWare Flex” and up to four named users. This allows an up to four log-in credentials and user security profiles to allow those four people to be actively naming and searching for documents in the system at the same time.

Solution Components	
<i>Subscription cost must be paid year up front and annually thereafter</i>	
Description	QTY
DocuWare Online Flex Access – 4 NAMED users with 20GB storage	1
Configuration & Training 1. Full process discovery 2. Creation specification document 3. Build/configuration of solution as per agreed upon specification 4. Beta go-live, support, and feedback process with beta users 5. System refinement as per beta go-live 6. Go-live support	1
Required up front configuration/activation charges = \$2250 PLUS Total Cost Per Month (subscription) - Includes support = \$300/month	

PRICING: SmartSearch Document Management Software		
Description	QTY	Price
<i>The Small Business Solutions Bundle is a great on ramp for customers looking to get started with Document Management. This system includes a five user Professional Edition License with Content Search, PDF Creator and Work XChange at a deeply discounted bundled price. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.</i>		
SmartSearch SMB - 5 User Bundle (with PDF Creator, Content Search & Work XChange)	1	\$ 6,600.00
SmartSearch SMB - 5 User Bundle Maintenance & Support	1	\$ 1,120.00
<i>The Purchase to Pay Solution Bundle is an end to end solution for automating Accounts Payable processes including: Requisition Origination, PO Generation & Routing, AP/GL Coding, Three way Matching and Invoice Approval Routing. Included in this package is a SmartSearch Corporate Edition license, five concurrent seat licenses, GlobalSearch, Work XChange, Image XChange Enterprise, GlobalForms, and the P2P Forms package. The bundled solution represents a savings of more than 20% over purchasing the modules individually. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.</i>		
Purchase to Pay Solution Bundle	1	\$24,500.00
Purchase to Pay Solution Bundle Maintenance & Support	1	\$ 4,900.00
<i>Square 9's Hire to Retire package bundles an end to end solution for Employee Onboarding including web forms for the online job application, WA, I9 and direct deposit registration. Data mapping to additional fields may be added based on an approved scope of work. With the inclusion of Work XChange, organizations can automate the entire hiring process and other future HR activities such as reviews and benefits enrollment. Included in this package is a SmartSearch Corporate Edition license, five concurrent seat licenses, GlobalSearch, Work XChange, Image XChange Enterprise, GlobalForms, and the H2R forms package. The bundled solution represents a savings of more than 20% over purchasing the modules individually.</i>		
Hire to Retire Solution Bundle	1	\$25,500.00
Hire to Retire Solution Bundle Maintenance & Support	1	\$ 5,100.00
<i>The SmartSearch core product suite delivers a highly intuitive foundation for Content Management with powerful tools for effectively managing images and electronic content. The base product provides the ability to store, search and manage documents through the included SQL 2012 Express database engine (may use existing instance of SQL 2005, 2008, 2012). Standard features include Web & LAN Access, Image Annotations, Image Separation, Image Enhancement, Bar Code Recognition, KeyFree Indexing, Email Delivery, Database Look Ups, Email Notifications, Audit Trail Reporting, Check-in/Check out and version control as well as TWAIN based document scanning. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.</i>		
SmartSearch 3 User Professional Edition License	1	\$ 2,300.00
SmartSearch 3 User Professional Edition License Maintenance & Support	1	\$ 500.00
SmartSearch 5 User Professional Edition License	1	\$ 3,850.00
SmartSearch 5 User Professional Edition License Maintenance & Support	1	\$ 770.00
SmartSearch 10 User Professional Edition License	1	\$ 7,700.00
SmartSearch 10 User Professional Edition License Maintenance & Support	1	\$ 1,540.00
SmartSearch 15 User Professional Edition License	1	\$11,550.00
SmartSearch 15 User Professional Edition License Maintenance & Support	1	\$ 2,310.00
SmartSearch 20 User Professional Edition License	1	\$15,400.00
SmartSearch 20 User Professional Edition License Maintenance & Support	1	\$ 3,080.00
SmartSearch 25 Professional Edition User License	1	\$19,250.00
SmartSearch 25 Professional Edition User License Maintenance & Support	1	\$ 3,850.00
SmartSearch Professional Edition Single User Add On License	1	\$ 3,850.00
SmartSearch Professional Edition Single User Add On License Maintenance & Support	1	\$ 3,850.00

<p><i>Additional features available for the SmartSearch Professional Edition include Text Searchable PDF Creation (includes formatted Word/Excel Output), Content Based Searching, Zonal OCR, Multi Database support, automated workflow and solutions for test servers and disaster recovery licensing. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.</i></p>		
Zonal Based OCR with Data Validation	1	\$ 725.00
Zonal Baised OCR with Data Validation Maintenance & Support	1	\$ 145.00
Text PDF Creator	1	\$ 725.00
Text PDF Creator Maintenance & Support	1	\$ 145.00
Content Search Engine	1	\$ 725.00
Content Search Engine Maintenance & Support	1	\$ 145.00
Content Search/PDF Creator Value Bundle	1	\$ 1,100.00
Content Search/PDF Creator Value Bundle Maintenance & Support	1	\$ 220.00
Multi Database Support	1	\$ 1,650.00
Multi Database Support Maintenance & Support	1	\$ 330.00
Tabular Data Control - for Multi Column Indexing	1	\$ 1,650.00
Tabular Data Control - for Multi Column Indexing Maintenance & Support	1	\$ 330.00
Work XChange - Workflow Engine	1	\$ 5,500.00
Work XChange - Workflow Engine Maintenance & Support	1	\$ 1,100.00
SmartSearch Disaster Recovery License	1	\$ 3,000.00
SmartSearch Disaster Recovery License Maintenance & Support	1	\$ 600.00
SmartSearch Test System License	1	\$ 3,000.00
SmartSearch Test System License Maintenance & Support	1	\$ 600.00
<p><i>The SmartSearch Corporate Edition combines enterprise based features into a cost effective server based license package. Bundled features include two (2) SmartSearch Server licenses to allow for load balancing, workflow automation, zonal based OCR, text based PDF Creation, content based searching, web based image access, multi database support, tabular data support, GlobalForms ODBC, and licensing for disaster recovery and test bench solutions. The Corporate Edition also includes all core SmartSearch components such as Web & LAN access, Image Annotations, Image Separation, Image Enhancement, Bar Code Recognition, KeyFree Indexing, Email Delivery, Email Notification, Audit Trail Reporting, Check-in/Check out and version control as well as TWAIN based document scanning. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.</i></p>		
SmartSearch Corporate Edition Server License	1	\$12,950.00
SmartSearch Corporate Edition Server License Maintenance & Support	1	\$ 2,590.00
Corporate Edition Seat Licensing 1-25 seats (per seat)	1	\$ 700.00
Corporate Edition Seat Licensing 1-25 seats (per seat) Maintenance & Support	1	\$ 140.00
Corporate Edition Seat Licensing 26-50 seats (per seat)	1	\$ 650.00
Corporate Edition Seat Licensing 26-50 seats (per seat) Maintenance & Support	1	\$ 130.00
Corporate Edition Seat Licensing 51-100 seats (per seat)	1	\$ 600.00
Corporate Edition Seat Licensing 51-100 seats (per seat) Maintenance & Support	1	\$ 120.00
Corporate Edition Seat Licensing 101-250 seats (per seat)	1	\$ 500.00
Corporate Edition Seat Licensing 101-250 seats (per seat) Maintenance & Support	1	\$ 100.00
Corporate Edition Seat Licensing 250 and above seats (per seat)	1	\$ 450.00
Corporate Edition Seat Licensing 250 and above seats (per seat) Maintenance & Support	1	\$ 90.00

SmartSearch Server Based Options increase the value in your SmartSearch investment by adding enterprise based features for solution development. Additional integration tools for data sharing with line of business applications and 3rd party capture solutions such as Kofax, NSI AutoStore and eCopy. Additional Application Server licenses can be added to your installation to improve support in distributed network environments. Servers share a common license pool to support load balancing, distributed capture processing and Guest/Read Only/Snapshot instances. Also supported are local application servers and file storage to minimize traffic in large WAN environments. For projects with higher volume capture requirements, OCR capabilities may be upgraded where multi-threaded processes are more suitable. This includes options for Dual Core, Tri Core and Quad Core processing. NOTE: Licensing for Content Searching and OCR Options need to be purchased separately for each application server. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.

Additional SmartSearch Application Server - Single Instance	1	\$ 1,350.00
Additional SmartSearch Application Server - Single Instance Maintenance & Support	1	\$ 270.00
Additional SmartSearch Application Server - Five Instance License	1	\$ 5,500.00
Additional SmartSearch Application Server - Five Instance License Maintenance & Support	1	\$ 1,100.00
Capture Workflow Load Balance Utility	1	\$ 750.00
Capture Workflow Load Balance Utility Maintenance & Support	1	\$ 150.00
SmartSearch Image XChange	1	\$ 250.00
SmartSearch Image Xchange Maintenance & Support	1	\$ 50.00
Image XChange - Enterprise License	1	\$ 2,500.00
Image XChange - Enterprise License Maintenance & Support	1	\$ 500.00
XML Transformer - for eCopy, PlanetPress, ScanTag	1	\$ 550.00
XML Transformer - for eCopy, PlanetPress, ScanTag Maintenance & Support	1	\$ 110.00
XML Transformer - Custom Connector Development	1	\$ 550.00
XML Transformer - Custom Connector Development Maintenance & Support	1	\$ 110.00
Kofax Capture Release Script	1	\$ 750.00
Kofax Capture Release Script Maintenance & Support	1	\$ 150.00
GlobalCapture Sharp OSA Connector	1	\$ 750.00
GlobalCapture Sharp OSA Connector Maintenance & Support	1	\$ 150.00
GlobalCapture Xerox EIP Connector	1	\$ 750.00
GlobalCapture Xerox EIP Connector Maintenance & Support	1	\$ 150.00
GlobalCapture Toshiba e-BRIDGE Connector	1	\$ 750.00
GlobalCapture Toshiba e-BRIDGE Connector Maintenance & Support	1	\$ 150.00
Zonal OCR/Text PDF Creator Bundle - Dual Core License	1	\$ 1,750.00
Zonal OCR/Text PDF Creator Bundle - Dual Core License Maintenance & Support	1	\$ 350.00
Zonal OCR/Text PDF Creator Bundle - Tri Core License	1	\$ 2,350.00
Zonal OCR/Text PDF Creator Bundle - Tri Core License Maintenance & Support	1	\$ 470.00
Zonal OCR/Text PDF Creator Bundle - Quad Core License	1	\$ 2,850.00
Zonal OCR/Text PDF Creator Bundle - Quad Core License Maintenance & Support	1	\$ 570.00
GlobalSync -	1	\$ 1,350.00
GlobalSync Maintenance & Support	1	\$ 270.00

GlobalSearch Server, which is included in both the Professional and Corporate Edition License, not only web enables SmartSearch; it also delivers a powerful RESTful API for custom integration, GlobalSearch iOS for the iPad and GlobalSearch for Android. In addition to extending existing LAN licensing, Web Access Only licenses may be purchased for environment where the full LAN client is not required for all users. Web Access clients are available as Read Only for users who only require view, email or print capabilities or Full Edit for users who need to extend their requirements to data editing, annotations, signatures and workflow. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.

GlobalSearch Read Only License (1-50)	1	\$ 275.00
GlobalSearch Read Only License (1-50) Maintenance & Support	1	\$ 55.00
GlobalSearch Read Only License (51-100)	1	\$ 250.00
GlobalSearch Read Only License (51-100) Maintenance & Support	1	\$ 50.00
GlobalSearch Read Only License (101-250)	1	\$ 225.00
GlobalSearch Read Only License (101-250) Maintenance & Support	1	\$ 45.00
GlobalSearch Web Edit License (1-50)	1	\$ 600.00
GlobalSearch Web Edit License (1-50) Maintenance & Support	1	\$ 120.00
GlobalSearch Web Edit License (51-100)	1	\$ 550.00
GlobalSearch Web Edit License (51-100) Maintenance & Support	1	\$ 110.00
GlobalSearch Web Edit License (101-250)	1	\$ 500.00
GlobalSearch Web Edit License (101-250) Maintenance & Support	1	\$ 100.00
<p><i>GlobalForms delivers a web based strategy for replacing paper forms based business processes. When submitted, a PDF or HTML Snapshot copy of the form is automatically indexed and filed into SmartSearch with data automatically passed to a line of business application or into additional forms. Designed for rapid, high volume forms development, the GlobalForms Design Suite option allows users to quickly create web forms through an easy to use drag and drop interface. Includes unlimited form creation and submissions. Concurrent license required for each form designer and per user filling out secure forms that require login (login required for saving form progress, form workflow and for digital signatures.) User license not required to fill out public forms. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.</i></p>		
GlobalForms with Live Design Studio - up to 10 concurrent users	1	\$ 8,500.00
GlobalForms with Live Design Studio - up to 10 concurrent users Maintenance & Support	1	\$ 1,700.00
GlobalForms - each additional user license	1	\$ 250.00
GlobalForms - each additional user license Maintenance & Support	1	\$ 50.00
GlobalForms ODBC Connector	1	\$ 1,100.00
GlobalForms ODBC Connector Maintenance & Support	1	\$ 220.00
GlobalForms Purchase to Pay Forms Pack	1	\$ 1,100.00
GlobalForms Purchase to Pay Forms Pack Maintenance & Support	1	\$ 220.00
GlobalForms Hire to Retire Forms Pack	1	\$ 1,950.00
GlobalForms Hire to Retire Forms Pack Maintenance & Support	1	\$ 390.00
<p>QuickBooks Connections is a suite of products designed to your greatly enhance your QuickBooks accounting processes through a shared information approach that eliminates repetitive data entry during document capture and the creation of Bills and Customer Invoices. Understanding that not everyone works in the same way, QuickBooks Connections provides multiple approaches for linking your SmartSearch documents and QuickBooks accounting data..</p> <p>QuickBill automates your QuickBooks Bill creation process by passing information extracted during document capture to QuickBooks through a workflow activity. This feature requires that the customer has purchased Tabular Data & Work Xchange. Please Note: This feature requires that the customer has purchased Tabular Data & Work XChange.</p> <p>QuickScan not only scans your documents to SmartSearch from QuickBooks, it eliminates secondary data entry requirements by using information from your QuickBooks transaction.</p> <p>QuickLinks provides direct access from any QuickBooks transaction to its related SmartSearch documents through a web interface. The feature requires that the customer has purchased GlobalSearch.</p> <p>All three QuickBooks options are available as a value added bundle to provide maximum flexibility for QuickBooks customers. 1st year M&S is required to purchase any item. M&S Rates are subject to 5% yearly escalation. It is recommended that the M&S contract is renewed each year to maintain access to support and applicable upgrade media.</p>		
QuickBill	1	\$ 1,100.00
QuickBill Maintenance & Support	1	\$ 220.00
QuickScan	1	\$ 450.00
QuickScan Maintenance & Support	1	\$ 90.00
QuickLinks	1	\$ 450.00

QuickLinks Maintenance & Support	1	\$ 90.00
QuickBooks Connections Bundle	1	\$ 1,650.00
QuickBooks Connections Bundle Maintenance & Support	1	\$ 330.00
<i>The Professional Services Group offers a variety of services to fully support your implementation projects or to augment the services of your own Professional Services team. Professional Services are available as both remote and onsite (T&E Additional) offerings.</i>		
Per Diem On Site Services	1	\$ 1,600.00
Per Diem Remote Access Services	1	\$ 1,250.00
Four Hour Remote Access Service Block	1	\$ 700.00
Per Diem Custom Development Services	1	\$ 1,800.00
Per Diem Custom Development Services Maintenance & Support	1	\$ 360.00
Per Diem Data Conversion Services	1	\$ 1,800.00
Custom SQL Scripting (4 hour Increments)	1	\$ 900.00
Custom SQL Scripting (4 hour Increments) Maintenance & Support	1	\$ 180.00
Per Diem Third Party Professional Services	1	\$ 1,800.00
Per Diem GlobalForms Development Services	1	\$ 1,800.00

Sample Pricing Scenario: SmartSearch PREMISE

This is a sample scenario in which a school would like to scan their student records and meeting minute files into two virtual file cabinets (“student records” and “meeting minutes”). The pricing sample includes **1.** Necessary licenses to install on the customer supplied server/infrastructure **2.** Discovery (outlining the structure and scanning/import procedure for the virtual file cabinets **3.** Installation and configuration **4.** Training and go-live support

Licensing for system access in this sample includes the core server software “SmartSearch Professional” and up to three concurrent users. This allows an unlimited number of log-in credentials and user security profiles with up to three people actively naming and searching for documents in the system at the same time.

Solution Components	
<i>Monthly options are all \$1 buyout leases (you own at end)</i>	
Description	QTY
SmartSearch Professional Server - Core server software	1
SmartSearch Client License - Concurrent user access license (allows unlimited user names)	3
Configuration & Training 1. Full process discovery 2. Creation specification document 3. Build/configuration of solution as per agreed upon specification 4. Beta go-live, support, and feedback process with beta users 5. System refinement as per beta go-live 6. Go-live support	1
1 Payment Purchase - Includes support through year 1 = \$7,600 Or 36 monthly payments - Includes support through year 1 = \$250/month Or 48 monthly payments - Includes support through year 1 = \$195/month Or 60 monthly payments - Includes support through year 1 = \$160/month	

Maintenance & Support

Please note: Support cost are **included through year 1 and are subject to 5% yearly escalation.*

*Solution components support = \$500**

PRICING: Document Scanning Services			
Description	QTY	Unit	Price
Light Prepping (document condition allows prepping over 850 pages/hour)	1	Image	\$0.014
Medium Prepping (document condition allows prepping 500-850 pages/hour)	1	Image	\$0.021
Heavy Prepping (document condition allows prepping less than 500 pages/hour)	1	Image	\$0.028
<i>Note: All imaging services include Image Quality Inspection, Pickup/Delivery within 50 mile radius of Springfield NJ, and secure FTP delivery of completed work</i>			
Scanning 8 1/2 x 11 or 11 x 17 images	1	Image	\$0.059
Scanning 8 1/2 x 11 or 11 x 17 images (if project over 500k images)	1	Image	\$0.055
Scanning oversized drawings	1	Image	\$1.07
Scanning oversized drawings (if project over 50k images)	1	Image	\$0.98
Document naming/indexing - off-shore	1	Keystroke	\$0.0096
Document naming/indexing - on-shore	1	Keystroke	\$0.0044
Color Scanning 8 1/2 x 11 or 11 x 17 images	1	Image	\$0.073
Pickup/Delivery beyond 50 mile radius of Springfield NJ	1	Trip	\$90.00
CD copy	1	Copy	\$13.70
DVD copy	1	Copy	\$27.50
Microfilm scanning 300DPI greyscale	1	Image	\$0.035
Microfilm planetary camera imaging	1	Image	\$0.055
Microfiche scanning 300DPI greyscale	1	Image	\$0.093
Film processing - camera negative	1	Roll	\$11.00
Duplication - Diazo	1	Roll	\$16.50
Duplication - Silver	1	Roll	\$30.00
Digital output to 16mm microfilm	1	Image	\$0.041
Digital output to 35mm microfilm	1	Image	\$0.275
Document Retention Services - <i>Consulting services to determine what documents should be scanned and saved and which documents should be purged and discarded from the file. Based on a bankers box (16 inches) it takes our consultant between 30 and 45 minutes to review the contents of a box</i>	1	Hour	\$58.00

PRICING: Archival Storage and Destruction Services			
Description	QTY	Unit	Price
<i>Note: Minimum storage charge \$75/month</i>			
Storage archive box	1 Month	Box	\$0.25
Storage legal box	1 Month	Box	\$0.65
Archive box filing, refiling & retrieval	1	Box	\$1.95
Legal box filing, refiling & retrieval	1	Box	\$5.75
Archive box secure shredding	1	Box	\$3.00
Legal box secure shredding	1	Box	\$4.00
Archive box permanent removal	1	Box	\$4.00
Legal box permanent removal	1	Box	\$5.00
Delivery/Pickup - Call by 5pm for NBD by 5pm (35mi radius of Carlstadt, NJ) 3 items	1	Trip	\$25.00
Delivery/Pickup - Call by 5pm for NBD by 12pm (35mi radius of Carlstadt, NJ) 3 items	1	Trip	\$35.00
Delivery/Pickup Mileage Add-On for each additional 30mi travel	1	Trip	\$25.00

Overview of DocuWare Functions

Published in March 2015 for DocuWare in Version 6.7

The DocuWare document management system is a standard software package, the basic version of which delivers all the essential functions for professional Enterprise Content Management. The system can be further customized and expanded using add-on modules, allowing every company to find their ideal document management solution.

DocuWare is available as an on-premise installation and as a cloud solution.

The on-premise solution comes in three server versions. DocuWare BUSINESS Server is an entry-level solution for small organizations with one server, operating one production site and with no requirement for automation or larger file cabinets. DocuWare PROFESSIONAL Server is a flexible solutionbase for medium-sized organizations and provides one end-user organization per DocuWare system, practically unlimited file cabinet size and synchronization of file cabinets at different production sites (additional server and client license required for each location. Add-on modules allow documents to be processed even more efficiently. DocuWare ENTERPRISE Server is a scalable solution for large organizations with high demands for performance and document security, supports an unlimited number of organizations within the same DocuWare system, and offers load balancing, clustering, encryption of document data and connection to external storage solutions.

The following lists all the essential functions of the DocuWare basic version and DocuWare Administration, as well as all add-on modules. For each function, it is indicated whether and to what extent it is available in BUSINESS Server, PROFESSIONAL Server and ENTERPRISE Server. The extent to which the function is available with DocuWare Web Client and Windows Explorer Client is also listed. Furthermore, there is a separate chapter for the functions of Windows Explorer Client.

Here you also find all the functions available with DocuWare Cloud. DocuWare Cloud is available in the following versions: Trial, Professional, Enterprise, and Flex.

Legend:

1 = available

1* = available indirectly via Web Client

2 = For the On Premise version available with add-on module, for DocuWare Cloud included in the base package

0 = not available

blank field = not applicable

Working with DocuWare – Functions of DocuWare Basic Version		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
DocuWare Web Client							
	Online access to DocuWare via Browser, without client installation	1	1	1	1	1	
DocuWare Windows Explorer Client							
	Access DocuWare via Windows Explorer	1	1	1	1		1
Space for All Documents: Capturing and Archiving Documents in DocuWare							
	Store all types of documents from any source in electronic file cabinets – create any number of file cabinets per DocuWare system	1	1	1	1	1	1
	Store scanned documents, files, and emails in file cabinets	1	1	1	1	1	1
	Access the most important functions via shortcuts					1	1
	DocuWare BUSINESS Server: Up to 4 GB storage capacity per file cabinet (equates to approximately 42,000 documents per file cabinet assuming a document size of approximately 100 KB)	1				1	1
	Maximum two billion documents per file cabinet – any document size	0	1	1	1	1	1
	Import of documents from the file system with drag & drop or button	1	1	1	1	1	1
	Transfer imported files in the original format	1	1	1	1	1	1
	Store compressed documents (storage in the file cabinet in zip format). This saves hard-disk space without causing any restrictions for the DocuWare Clients	0	0	1	0		
	Store encrypted documents in the file cabinet by integrating AES and RSA processes. This allows documents to only be made visible via DocuWare. Even an administrator can no longer display documents directly (DocuWare Online: activated by default)	0	0	1	1		
	Copy documents from one file cabinet to another – beginning with result list	0	0	1	1	1	
Electronic Document Trays: Organizing Documents Before Storage							
	Each user can create any number of electronic document trays in their DocuWare system to initially accommodate documents after they are scanned or imported	1	1	1	1	1	0
	For perfect clarity: documents trays can be individually named; five colors can be selected for document trays	1	1	1	1	1	0
	Import documents from the file system or the desktop into the document tray using drag and drop	1	1	1	1	1	0

Working with DocuWare – Functions of DocuWare Basic Version		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	Drag and drop a document from the document tray to a document in the result or task list to attach it	1	1	1	1	1	0
	Archive document in the same way as an existing one: Drag and drop document from the document tray to a document in the result list to archive it in the same file cabinet and with the same index words	1	1	1	1	1	0
	Option to staple multi-page documents or to unstaple documents in the document tray	1	1	1	1	1	0
	Option to select from various views for the documents contained in the document tray: a simple list through thumbnails to an index card	1	1	1	1	1	0
	If several document trays are open, these are displayed with tabs and can be sorted by dragging and dropping them	1	1	1	1	1	0
	Display of the total page count for each document in the table and index card view	1	1	1	1	1	0
	Create import and printer configurations directly from the document in the document tray and use the document as a sample document	1	1	1	1	1	0
	Call up Scan App using button in the document tray dialog	1	1	1	1	1	0
Configuring Document Trays							
	Create document trays and assign them to multiple users, e.g. an entire department	1	1	1	1	1	
	Assign several Content and Thumbnail Servers to one document tray location to increase fail-safety	1	1	1	1	1	
	Activate Intelligent Indexing for document trays	2	2	2	1	2	
Storing Documents and Adding Index Words							
	Assignment of search criteria using freely definable store dialog – various store dialogs can be defined per file cabinet	1	1	1	1	1	1
	Quick input option for current date using the X key	1	1	1	1	1	1
	Support for input using predefinable field masks	1	1	1	1	1	1
	Automatic check of index words for plausibility, validation	1	1	1	1	1	1
	Fast indexing by pre-indexing documents in a document tray	1	1	1	1	1	0
	Select list of previously entered words for each store dialog	1	1	1	1	1	1
	Fixed select list: specification of words for defined fields to ensure unique classification	0	1	1	1	1	1
	External select list: specification of index words from external databases	0	1	1	0	1	1

Working with DocuWare – Functions of DocuWare Basic Version		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	External select list: specification of index words from external files	0	1	1	1	1	1
	Automatic storage of pre-indexed documents	1	1	1	1	1	0
	The directory name is adopted as an index word when stored using Windows Explorer Client	1	1	1	1		1
	Support for error-free index word entry using predefined field dialogs. At each position of the index word, the user can only enter those characters that are specified in the dialog definition	1	1	1	1	1	1
	Identification of mandatory fields with asterisks (*) in store and info dialogs	1	1	1	1	1	1
	Change index entries of several documents at one time	1	1	1	1	1	1
	Complete indexing when storing documents manually: Index words that were already entered are used to search the file cabinet. The document in the file cabinet that contains the same index words and was stored most recently is used to complete the missing index words for the document being stored. This makes it quick and efficient to store similar documents	1	1	1	1	1	
	Use barcodes for manual archiving: read barcodes with One Click Indexing and copy them to the store dialog as an appropriate value (additional Barcode & Forms license needed)	0	2	2	1	2	
Quick and Easy Retrieval of Documents (see also separate chapter "Windows Explorer Client")							
	Document search using index words	1	1	1	1	1	
	Search several file cabinets at the same time	0	1	1	1	1	
	Option to enter index words with wildcards – asterisk search, etc.	1	1	1	1	1	
	Quick input option for current date using the X key	1	1	1	1	1	
	Select list(s) for each search field ensure that index words can be entered quickly and without errors	1	1	1	1	1	
	Search with the logical operators AND, OR, and NOT (including for index filters)	1	1	1	1	1	
	Automatic saving of the last five searches so that they can be easily used again	1	1	1	1	1	
	Saving of individual searches that are often needed: as a list in DocuWare (additional Task Manager license needed), shortcut on the desktop, or favorite in your browser	0	2	2	1	2	
	Hierarchical search using select lists	1	1	1	1	1	
	Definition of fields used for selective select lists	1	1	1	1	1	

Working with DocuWare – Functions of DocuWare Basic Version		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	Dynamic links: all documents that belong to the same process can be displayed in a further result list – documents with an identical index word in defined field(s) called up directly in result list or viewer. For example, all documents with the same project name can be displayed in a linked result list	1	1	1	1	1	1*
Document and Data Export							
	Found documents can be exported in: Document tray, file system or email client	1	1	1	1	1	1
	Create DocuWare Request from a result list	1	1	1	1	1	0
	Export result list as CSV file	1	1	1	1	1	0
Displaying Archived Documents							
	Clear listing of retrieved documents with the associated search terms in a result list, display of fields in the result lists can be individually adapted	1	1	1	1	1	
	Documents with attachments are identified in the result list with a symbol	1	1	1	1	1	0
	Display documents either in DocuWare Viewer or the original program or viewer – all normal file formats are supported	1	1	1	1	1	1
	Download documents from DocuWare, original file or PDF	1	1	1	1	1	1*
	Different file formats can also be displayed within a logical document – important for displaying emails with attachments, for example	1	1	1	1	1	1
	Open several documents in separate Viewer windows simultaneously	1	1	1	1	1	0
	Call up linked documents from a result list, task lists, and using the DocuWare Viewer toolbar	1	1	1	1	1	0
	Check sum control using two symbols in the status bar of the Viewer	1	1	1	1	1	1*
	Documents displayed in optimum width without a margin in the Viewer using the "Fit to width for optimum display" option	1	1	1	1	1	1
	Automatic image enhancement in DocuWare Viewer: Rotate and/or deskew document	1	1	1	1	1	0
	Immediate display of the first document in a result or task list in DocuWare Viewer	1	1	1	1	1	0
	Automatically refresh the display of a document in the DocuWare Viewer when it has been changed using the "Edit" function in the viewer	1	1	1	1	1	0
Fulltext Indexing and Searches							
	Automatic fulltext indexing of file cabinets regardless of database used	1	1	1	1		

Working with DocuWare – Functions of DocuWare Basic Version		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	Fulltext indexing of scanned documents with powerful OCR and of other common formats with an integrated text filter	1	1	1	1		
	Option for fulltext search with wildcards before and after a word	1	1	1	1	1	
	Option for phrase search and distance search	1	1	1	1	1	
	Text view for fulltext searches (in addition to thumbnail view and document name): Display of first section of text, which contains the search term (highlighted)	1	1	1	1	1	
	In DocuWare Viewer, fulltext search terms are highlighted in the document, in the display of both scanned documents and other documents that are present as coded information (CI)	1	1	1	1	1	
	Sorting of fulltext search results according to relevance, i.e. frequency of the index word	1	1	1	1	1	
	Automatic recognition of the document language possible (except for Greek and Cyrillic languages)	1	1	1	1	1	
Editing Documents							
	Archived documents can be opened and edited in the editor	1	1	1	1	1	1
	Attach a document from a document tray to a document in a DocuWare file cabinet	1	1	1	1	1	0
Editing Documents: DocuWare Viewer							
	Open and edit archived documents in DocuWare Viewer: Mark and annotate documents with overlays – the original document is not modified	1	1	1	1	1	1*
	Open info box for current document to view index entries and change them if necessary	1	1	1	1	1	1*
	Display document in the Viewer with index dialog	1	1	1	1	1	0
	File properties are displayed in the Viewer as buttons and are copied to fields by clicking	1	1	1	1	1	1*
	Numerous editing options in DocuWare Viewer: Text passages can be highlighted using a rectangle or circle in any color, either transparent or opaque, or with a freehand line; text notes can be positioned at any location in the document any font, size, and color can be selected; annotations can be entered with a freehand line, e.g. signature on touch displays. Save custom settings for all tools, e.g. font size or color	1	1	1	1		
	Text passages can be highlighted on any page of a file	1	1	1	1	1	1*

Working with DocuWare – Functions of DocuWare Basic Version		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	One-click indexing: Select words, dates, and numbers by mouse over and transfer them into the store dialog with a single click. Automatic recognition of the document language possible (except for Greek and Cyrillic languages)	1	1	1	1	1	0
	One-click indexing: Select barcodes and transfer them into the store dialog with a single click (additional Barcode & Forms license needed)	0	2	2	1	2	0
	Copy text to the clipboard to use it in other applications (enabled by default)	1	1	1	1	1	1*
	A total of five overlay levels can be individually shown/hidden	1	1	1	1	1	1*
	Merge annotation levels with the document to permanently fix all annotations and stamps	1	1	1	1	1	1*
	Overlays can be printed with document	1	1	1	1	1	1*
Electronic Stamps in the DocuWare Viewer							
	Personal and public stamps in the DocuWare Viewer for processing documents; workflows based on Task Manager are initiated by stamps	1	1	1	1	1	1*
	Password prompt for stamps in order to increase security for stamp processes	1	1	1	1	1	1*
	Customization of stamps, e.g. with scanned-in signature as well as stamp date, time and user ID of person signing	1	1	1	1	1	1*
	Stamps can be customized by adding form fields: option to enter variable information when stamps are applied (including using fixed and external selection lists – not for BUSINESS Server)	1	1	1	1	1	1*
	Set electronic signature by applying a stamp	1	1	1	1	1	1*
	Permanently activate stamps for quick stamping	1	1	1	1	1	0
	Stamps can be used for both scanned documents and for Office, PDF, and other file formats	1	1	1	1	1	1*
	Workflow based on Task Manager: Automatically change up to five selected index entries in a document by setting a stamp	0	1	1	1	1	1*
	After stamping a document, automatically open the next one from the current list/document tray	1	1	1	1	1	0
	Automatically close viewer after applying stamp	1	1	1	1	1	0
Version Management							
	Automatic version management: a new version is created for every document processed directly in the file cabinet	1	1	1	1	1	1

Working with DocuWare – Functions of DocuWare Basic Version		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	Manual version management: Version control per document by checking out and checking in; document is locked for further editing by checking out	1	1	1	1	1	1
	Display of the version history and option to go back to previous versions	1	1	1	1	1	1
Digital Signature							
	Set a simple signature by applying the stamp	1	1	1	1	1	1*
Forwarding/Sending Archived Documents							
	Send any document via email directly from a DocuWare document tray or viewer	1	1	1	1	1	1*
	Send several documents simultaneously by email directly from a result list	1	1	1	1	1	0
	Send hyperlinks to a document or result list by email	1	1	1	1	1	1*
	Use MAPI-compatible mail system	1	1	1	1	1	1*
Perfect Overview and Maximum User Convenience							
	Customize column width and functions for the result lists	1	1	1	1	1	0
	Columns in result lists can be individually sorted and enabled/disabled one at a time	1	1	1	1	1	0
	Display of number of documents in a list at the top of the list, colored highlighting if the number changes	1	1	1	1	1	0
	Search/store dialog can be customized for individual users or groups	1	1	1	1	1	1
	Maximum reading clarity in a small area due to optimizing display	1	1	1	1	1	1*
	Automatic login (Single Sign-On) by saving the DocuWare user ID in a cookie	1	1	1	1	1	0
	Use of the Windows login to log into DocuWare (Single Sign-On)	1	1	1	0	1	1
	User-interface language can be freely selected in the DocuWare main menu	1	1	1	1	1	0
	DocuWare Update: Automatic message from new DocuWare versions or hotfixes for DocuWare Client components and apps that are available	1	1	1	1	1	0
	Create data record without document in file cabinet, e.g. in order to attach documents downstream	1	1	1	1	1	0
DocuWare Printer App: Storing Documents Using the Print Function in Your Programs							
	<i>For the functions of the DocuWare Printer App, see the sections "DocuWare Printer App" and "Configuring DocuWare Printer App" in chapter "DocuWare Desktop Apps"</i>						

Working with DocuWare – Functions of DocuWare Basic Version		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
DocuWare Scan App: Scanning and Storing Documents							
	<i>For the functions of the DocuWare Scan App, see the section "DocuWare Scan App" in chapter "DocuWare Desktop Apps"</i>						
DocuWare Import App: Monitoring Folders and Importing Documents							
	<i>For the functions of the DocuWare Import App, see the chapter "DocuWare Import" and the section "Import Configurations" in the chapter "DocuWare Desktop Apps"</i>						
Upload Service App: Move Files to DocuWare Document Trays							
	Automatic loading of documents from a folder of the file system into a DocuWare document tray	1	1	1	1		
	Transfer files from an external scanning program to a document tray	1	1	1	1		
	Monitor file folders for automatic upload of files into the document tray	1	1	1	1		
	Automatic conversion of DocuWare TIFF files to PDF format (default format in DocuWare document tray)	1	1	1	0		
	Read index information from an XML file which was generated during the scan. This is possible with almost all multifunction devices by leading manufacturers. For further information, see: http://help.docuware.com	1	1	1	1		
	Display the status and origin of documents in the detail view in the document trays	1	1	1	1		

DocuWare Administration – Setting Up and Managing the System		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud*	Web Client	Windows Explorer Client
Flexible System Integration							
	System access via intranet and/or Internet	1	1	1	1	1	1
	User authorization via login name and password of user	1	1	1	1	1	1
	User authorization via single sign-on	1	1	1	0	1	1
	Access to DocuWare system using DocuWare user name (password not required) via a trustworthy third-party application	1	1	1	1	1	0
Easy Scalability with Specialist DocuWare Server							
	Authentication Server: manages licenses and users, grants user access to features and documents, manages all settings	1	1	1	1		
	Content Server: manages documents, access control to files, and index data	1	1	1			
	Workflow Server: Administer and control batch processes and automatic scheduled processes	1	1	1			
	Workflow Engine Server: Save and administer workflows and workflow instances for Workflow Manager	2	2	2			
	CONNECT to Mail Server: Calls up emails from the mail server, converts them, and stores them in the DocuWare system	2	2	2			
	SAP HTTP Server: stores documents from SAP in DocuWare	0	2	2	0		
	Load balancing: automatic load balancing when accessing file cabinets	0	0	1	1		
	DocuWare System supplemented with Fulltext Server – construction of the fulltext index	1	1	1			
	DocuWare System supplemented with Thumbnail Server – thumbnail cache for document trays in DocuWare and multi-page views	1	1	1			
	DocuWare System supplemented with Notification Server – management of notifications	0	2	2			
	Client capability: multiple organizations possible per system	0	0	1			
System Administration							
	Management of the document store: central administration independent of physical medium	1	1	1			
	Connections and authorizations (databases and files): administered centrally at system level; all can be integrated via databases tested by DocuWare (Microsoft-SQL, Oracle, MySQL)	1	1	1			

DocuWare Administration – Setting Up and Managing the System		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud*	Web Client	Windows Explorer Client
	Performance and scalability: use of multiple Content Servers on different physical machines (volume), use of multiple databases: file cabinets can be distributed across multiple databases on different physical machines (volume), no restrictions in terms of database program (different databases allowed within the same system)	0	1	1			
	Overview of logged-in users and licenses in use in the DocuWare system	0	1	1			
Organization Administration							
	Static select lists: one-time read of data from external systems (databases)	0	1	1	0		
	Static select lists: one-time read of data from external systems (text files) or one-time entry of data	0	1	1	1		
	External select lists: dynamic queries of external systems generate select lists (e.g. ERP systems, databases)	0	1	1	0		
	Assignment of select lists to index fields and dialogs	0	1	1	1		
	Setup of a guest account per organization	1	1	1	1		
	Overview of logged-in users and licenses in use in the relevant DocuWare organization	0	1	1	1		
Secure Passwords							
	Minimum length context	1	1	1	1		
	Complexity: Upper and lower case characters, numbers, and special characters can all be set as separate password requirements	1	1	1	1		
	Setting the expiration date	1	1	1	1		
	Set the number of permitted attempts and how long a client is blocked if it exceeds the limit	1	1	1	1		
	Receive notification when your password is about to expire to remind you to change it	1	1	1	1		
	Deactivate the time limits for individual users' passwords, e.g. if their accounts are only used for workflows	1	1	1	1		
	Block a user account after the password has been entered incorrectly a certain number of times (with a note to indicate when the account was blocked)	1	1	1	1		
Rights Administration							
	Central administration of users and rights in DocuWare administration	1	1	1	1	1	1
	Functional rights: access to individual functions, stamps, select lists, templates; definition at organization level	1	1	1	1	1	1

DocuWare Administration – Setting Up and Managing the System		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud*	Web Client	Windows Explorer Client
	File cabinet rights: access rights to documents in file cabinets	1	1	1	1	1	1
	Profiles: grouping of functional rights into function profiles and file cabinet rights to file cabinet profiles	1	1	1	1	1	1
	Roles: combination of function profiles and file cabinet profiles according to task	1	1	1	1	1	1
	Predefined roles: System Administrator, Organization Administrator, and File Cabinet Owner	1	1	1	1	1	1
	System Administrator can determine if in the general search dialog a free SQL command is allowed	1	1	1	0	1	1
User Administration							
	Structuring of users into groups	1	1	1	1	1	1
	Direct assignment of individual rights, profiles and roles to different users	1	1	1	1	1	1
	Assignment of roles to groups	1	1	1	1	1	1
	Set up inbox (default document tray) for user	1	1	1	1	1	1
	Convenient user and group administration: integration and running synchronization of users and groups in external Directory Services with those of DocuWare system, support for LDAP and Active Directory Services	0	1	1	0		
	Unblock user accounts as a user with the "User Management" right	1	1	1	1		
	Specify users as out of office	1	1	1	1		
	Create substitution rules: Assign users	1	1	1	1		
	Create substitution lists: Compile substitution rules in lists	1	1	1	1		
File Cabinet Structure and Rights Administration							
	Implementation of a hierarchical file cabinet structure (tree view)	1	1	1	1	0	1
	When a new file cabinet is created, the file cabinet settings of an existing file cabinet are imported by means of an XML file	1	1	1	1		
	Transfer of the field structure of an existing file cabinet by means of an XML file	1	1	1	1		
	File cabinets on hard disk, CD, DVD, WORM in manual or jukebox system, Storage Area Network (SAN), RAID systems	1	1	1			
	Automatic finalizing and recording of file cabinets that are on a jukebox	1	1	1	0		
	File cabinets on Content Addressed Storage (CAS), NetApp storage solutions	0	0	1	0		
	Hierarchical storage management	0	1	1			

DocuWare Administration – Setting Up and Managing the System		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud*	Web Client	Windows Explorer Client
	Organization of storage into logical disks, user-defined capacity restrictions, e.g. on CD/DVD/Blu-ray disk size	0	1	1	0		
	Select database types for each file cabinet individually and combine in any configuration within a DocuWare system	1	1	1	0		
	File cabinets with higher security level. Access to these is forbidden even by the administrator	0	0	1	1		
	Detailed rights definition (e.g. display, edit, delete, change) for each file cabinet and index field and in relation to overlays	1	1	1	1		
	Additional definition of field rights: Field must not be empty, entry must be contained in select list, no new entries	1	1	1	1		
	Link file cabinet rights with index entries of a document (index filter)	0	1	1	1		
File Cabinet Synchronization Workflow							
	Synchronization of central master file cabinets and decentralized satellite file cabinets	0	1	1	1		
	Different structures in master and satellite file cabinets possible, mapping of index fields	0	1	1	1		
	Configurable conflict solution, in the event that documents in master and satellite file cabinets were modified at the same time	0	1	1	1		
	Scheduled workflow	0	1	1	1		
Export Workflow							
	Export existing file cabinets within system, selected file cabinet can be a new or existing file cabinet	0	1	1	1		
	Export into other DocuWare system	0	1	1	0		
	Scheduled workflow	0	1	1	1		
Migration Workflow							
	Automatically copy/move documents, e.g. from hard disk to optical media within a file cabinet	0	1	1	0		
	Recording: optionally create a copy of the data to be recorded for later recording with any program	0	1	1	0		
	Scheduled workflow	0	1	1	0		
Deletion Workflow							
	Automatically control the life cycle of documents, including document deletion and optionally database entries	1	1	1	1		

DocuWare Administration – Setting Up and Managing the System		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud*	Web Client	Windows Explorer Client
	Option for irrecoverable document deletion. The data to be deleted is overwritten with randomly generated data that is created in accordance with the DoD definition (National Industrial Security Program Operating Manual). Once it has been deleted, no restore tools are able to reconstruct the data	0	0	1	1	1	1
	Scheduled workflow	1	1	1	1		
Logging and Monitoring							
	Default logging of all changes in system, all runtime changes in documents as well as all workflows (DocuWare Online: not on system level)	0	1	1	1		
	Specification of changes/activities to log by system administrator, organization administrator, file cabinet owner, according to level (DocuWare Online: not on system level)	0	1	1	1		
	Definition of logging configuration based on access rights	0	1	1	1		
	Filter logging information, e.g. entries in a special database field or log the activities of a particular user	0	1	1	1		
	Logging destinations: database, XML file, text file	0	1	1	1		
	Logging at debug level for the whole DocuWare system or just for certain elements such as Content Server or DocuWare Administration using a menu command	0	1	1	0		
	Logging export as XML files	1	1	1	1		
	Documentation of all settings of the DocuWare system, organizations, and clients in PDF format	1	1	1	0		
Document Security							
	Double data retention: additional storage of database entries in document file(s) as XML header file(s)	1	1	1	1		
	Encrypt documents and headers by linking to AED and RSA procedures	0	0	1	1		
	Restore corrupt databases using information stored in XML header files	1	1	1			
	Encrypted communication, communication between client and server using Windows mechanisms	1	1	1	1	1	1
	Server inter-communication via SSL	0	1	1			
	Log on using DocuWare login	1	1	1	1	1	1
	Log on using Windows login (Single Sign-On)				0		
	Transactions: system always protects data integrity, document changes and storage transactionally, both for index data and for document	1	1	1	1		
	Access to documents only possible via Content Server, no direct user access to document directories	1	1	1	1		

DocuWare Administration – Setting Up and Managing the System		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud*	Web Client	Windows Explorer Client
	Access to database only possible via Content Server, no direct user access to the database	1	1	1	1		
	High security level for file cabinet and users; only users with high security level authorization (no Single Sign-On) can access a file cabinet with a high security level	0	0	1	1	1	1
	Administrator can block potentially hazardous file types for an organization	1	1	1	1		
	Back up and restore system settings, for example data connections, storage locations for documents and user administration settings, in an XML file	1	1	1	0		
	Passwords are stored using the salted hash process	1	1	1	1		

**Some of the administration functions listed are not relevant to DocuWare Cloud.*

DocuWare Configuration Browser-based configuration platform for the administration of special browser-based DocuWare components		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Configuring DocuWare							
	<i>See the respective chapters for information on configuring the individual components</i>						
	Open DocuWare Configuration settings directly from DocuWare Web Client – no installation required	1	1	1	1	1	
	Configuration of various DocuWare components using wizards	1	1	1	1	1	
	Detailed rights assignment for creating, editing, and assigning individual configurations via DocuWare Administration	1	1	1	1	1	

Windows Explorer Client		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
DocuWare Windows Explorer Client allows all DocuWare file cabinets to be integrated into the Windows file directory							
Intuitive Working with Windows Explorer							
	Archive documents from the Windows file system to DocuWare using drag & drop, menu or keyboard shortcut: automatic indexing using the folder and file names; automatic copying of indexing for further documents	1	1	1	1		1
	Archive complete folder structures from the file system, documents are archived in DocuWare with the relevant index words	1	1	1	1		1
	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 index words	1	1	1	1		1
	Create new folders and save documents by dragging and dropping them there	1	1	1	1		1
	Display of default document tray of the logged-in user in tree view	1	1	1	1		1
	Display and change index entries for documents directly in Windows Explorer	1	1	1	1		1
	Create links to archived documents and/or DocuWare folders (e.g. on the desktop or within an application, such as PowerPoint)	1	1	1	1		1
	Access an archived document from an application in read-only mode via "Open"	1	1	1	1		1
	Edit archived documents (in the application stored in Windows Explorer for that file extension)	1	1	1	1		1
	Open a document from Windows Explorer Client in DocuWare Viewer	1	1	1	1		1
	Print documents from context menu on default printer	1	1	1	1		1
	Send link to document from Windows Explorer Client	1	1	1	1		1
	Display archived documents in read-only mode in the application stored in Windows Explorer for that file extension	1	1	1	1		1
	For faster access, a filter can be used that limits the result to the most important lines (e.g. only to documents from the last 30 days or to documents that the users themselves or their team created)	1	1	1	1		1
	Display the version history of a document	1	1	1	1		1

DocuWare Cloud					
Via the Internet, without any software installed on your local PC, you can use DocuWare Cloud to store, search, view, download, edit and integrate documents in your everyday business processes. Your documents are securely stored in the Cloud. After entering a user ID, you'll find yourself in familiar software terrain - at any time of the day and from anywhere around the world		Trial Version	Professional Version	Enterprise Version	Felix Version
DocuWare Cloud Portal					
	Access for DocuWare Cloud Administrator to DocuWare Cloud Portal	1	1	1	1
	Edit contact data der Kontaktdaten	1	1	1	1
	Increase/reduce capacity of documents	0	1	1	1
	Intelligent Indexing: Rename document types	1	1	1	1
	Intelligent Indexing: Configure field filter	1	1	1	1
	Activation and configuration of FTP upload	1	1	1	1
	Configure users and roles	1	1	1	1
	DocuWare Request: Start jobs; download file cabinets	1	1	1	1
Connect mobile DocuWare applications					
	DocuWare PaperScan App (Android/iOS)	1	1	1	1
	DocuWare Mobile II (iOS)	1	1	1	1
	DocuWare Mobile II (Android)	1	1	1	1
	DocuWare Mobile I (Windows Phone 7, 8)	1	1	1	1
Security					
	Encrypted data storage in a European data center (EMEA)	1	1	1	1
	Encrypted data storage in a US-american data center (US)	1	1	1	1
	Data are stored twice, each on a separate storage system in different fire zones	1	1	1	1
	Certified according to ISO 27001, this standard specifies the requirements for the manufacture, introduction, operation, monitoring, maintenance, and optimization of a documented Information Security Management System (ISMS)	1	1	1	1
	Encrypted communication: Data encryption with Secure Site SSL certificate (VeriSign), 256 Bit	1	1	1	1
	Strict separation between customer data and system data	1	1	1	1
	Personal backup of all/ selected data as ZIP archive with DocuWare Request possible at any time; may be charged additionally	1	1	1	1
Support					
	Prioritized support	0	1	1	1

DocuWare Desktop Apps		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE: Server	DocuWare Cloud	Web Client	Windows Explorer Client
The DocuWare Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App							
DocuWare Desktop Apps							
	Individual apps can be installed and uninstalled from the DocuWare main menu and from the Desktop Apps context menu in the Windows status bar	1	1	1	1		
	Search for updates for DocuWare Desktop Apps via tray menu	1	1	1	1		
DocuWare Printer App: Storing Documents Using the Print Function in Your Programs							
	Store documents in file cabinet	1	1	1	1		
	Store documents in document tray	1	1	1	1		
	Initiate the printer configuration from a document in the document tray and use the document as a sample document for a new configuration	1	1	1	1		
	Convert documents into PDF/A (long-term archiving format)	1	1	1	1		
	Index document: Automatic reading of content from defined readout areas of the document. This content is used for indexing (e.g. adopting the company name from an invoice into the respective index field)	1	1	1	1		
	Automatic reading of barcodes from defined readout areas of the document, e.g. invoice number (additional Barcode & Forms license needed)	0	2	2	1		
	Filter barcodes with exact specification of characters	0	2	2	1		
	Index document using fixed and dynamic entries	1	1	1	1		
	When indexing, you can combine fixed entries, dynamic entries, and text readout areas in an index field	1	1	1	1		
	Split the content of text readout areas in order to transfer individual parts to different index fields	1	1	1	1		
	Replace the content of text readout areas with different text, e.g. when printing from the ERP, replace the index work "Invoice" with the expanded term "Invoice – output"	1	1	1	1		
	Sample documents for reading text from file system or select document tray	1	1	1	1		
	Define readout areas based on parts of text within the document (setting an anchor), e.g. the invoice amount which is always at the end, next to the word "Total"	1	1	1	1		
	Automatic overlay of a invoice form, letterhead etc. - can be done separately for first page and subsequent pages	1	1	1	1		

DocuWare Desktop Apps		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
The DocuWare Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App							
	Process documents as transparent to prevent elements with a white background, for example, overlaying a stored letterhead logo	0	1	1	1		
	Split multi-page documents after a set number of pages	1	1	1	1		
	Split multi-page documents following text criteria defined using readout areas (e.g. "Page 1")	1	1	1	1		
	Split multi-page documents after an empty readout area or if the content of the area changes	1	1	1	1		
	Split multi-page documents based on barcodes (additional Barcode & Forms license needed)	0	2	2	1		
	Embed simple electronic signature in PDF	1	1	1	1		
	Only one printer appears for all DocuWare Printer configurations in the printer list for applications (automatic detection of the configuration to be used)	1	1	1	1		
	Identify and classify a document based on text criteria and on printing title (e.g. a specific configuration is executed if "Invoice" appears at a specific point in a Word document)	1	1	1	1		
	Identify and classify a document based on the application from which it is printed (e.g. it always runs a certain configuration when you print from your ERP system)	1	1	1	1		
	Add pages, e.g. append return form	1	1	1	1		
	Print a copy on a physical printer – with or without a form/letterhead	1	1	1	1		
	Print additional documents (e.g. General Terms and Conditions, a return form)	1	1	1	1		
	DocuWare Control: Control the document processing with DocuWare Printer directly from applications such as ERP or MS Word. Invisible text commands are written to the documents or document templates using a special font (DocuWare Control)	1	1	1	1		
	Create electronic invoices in accordance with the German ZUGFeRD standard (PDF/A-3 with integrated XML meta data)	1	1	1	1		
	Automatically attach edited document to a new email, e.g. electronic invoice	1	1	1	1		
Configuring DocuWare Printer App							
	Configurations are created and managed centrally and are immediately available on the Client (providing the relevant rights are in place)	1	1	1	1		
	Create configurations for DocuWare Printer App	1	1	1	1		

DocuWare Desktop Apps		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
The DocuWare Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App							
	Copy existing configurations	1	1	1	1		
	Deactivate configurations, e.g. for test purposes	1	1	1	1		
	Assign access rights with ease: Assign a configuration directly to individual users or via roles to all users that hold the role	1	1	1	1		
	The person who created the configuration automatically receives user and administrator rights	1	1	1	1		
DocuWare Scan App: Scanning and Storing Documents							
	Scan documents from any scanner (with TWAIN or WIA driver) that is installed on your local PC	1	1	1	1		
	Open DocuWare Scan App directly from the document tray	1	1	1	1		
	Store documents in file cabinet	1	1	1	1		
	Store documents in document tray	1	1	1	1		
	Convert documents into PDF/A (long-term archiving format)	1	1	1	1		
	Index document: Automatic reading of content from defined readout areas of the document. This content is used for indexing e.g. adopting the company name from an invoice into the respective index field (additional Barcode & Forms license needed)	0	2	2	1		
	Index document using fixed and dynamic entries	1	1	1	1		
	When indexing, you can combine fixed entries and dynamic entries with text readout areas in an index field (additional DocuWare Import license needed)	0	2	2	1		
	Split the content of text readout areas in order to transfer individual parts to different index fields	1	1	1	1		
	Index document using 1D and 2D barcodes (additional Barcode & Forms license needed)	0	2	2	1		
	Select barcode type that is to be searched and used for the indexing (additional Barcode & Forms license needed)	0	2	2	1		
	Split the content of barcode readout areas in order to transfer individual parts to different index fields (additional Barcode & Forms license needed)	0	2	2	1		
	Select sample documents for reading out text or barcodes from file system or document tray (additional Barcode & Forms license needed)	0	2	2	1		
	Define readout areas based on parts of text within the document (setting an anchor), e.g. the invoice amount that is always at the end, to the right of the word "Total" (additional Barcode & Forms license needed)	0	2	2	1		

DocuWare Desktop Apps		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
The DocuWare Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App							
	Automatic overlay of a invoice form, letterhead etc. - can be done separately for first page and subsequent pages (additional Barcode & Forms license needed)	1	1	1	1		
	Split multi-page documents after a set number of pages	1	1	1	1		
	Split multi-page documents following text criteria defined using readout areas (e.g. "Page 1" (additional Barcode & Forms license needed)	0	2	2	1		
	Split multi-page documents after an empty readout area or if the content of the area changes (additional Barcode & Forms license needed)	0	2	2	1		
	Split multi-page documents based on barcodes (additional Barcode & Forms license needed)	0	2	2	1		
	Embed electronic signature in PDF	1	1	1	1		
	Automatic recognition of the document language possible (except for Greek and Cyrillic languages)	1	1	1	1		
	Automatic rotating and aligning of pages that were scanned in the wrong direction or at an angle	1	1	1	1		
	Manually upload documents in PDF/A format after scanning them, e.g. if you want to check the order of the pages or rearrange them	1	1	1	1		
	Rearrange the pages within a document using drag & drop	1	1	1	1		
	Manually delete pages and documents, e.g. blank or poorly scanned pages	1	1	1	1		
	Automatic deletion of separating pages (additional Barcode & Forms license needed)	0	2	2	1		
	Automatic deletion of blank pages	1	1	1	1		
	Add pages at a later date using drag & drop, e.g. if certain pages were inserted at an angle	1	1	1	1		
	Direct adding of pages at a later date with a single click	1	1	1	1		
	Manually rotate pages scanned in incorrect direction after scanning	1	1	1	1		
	Split documents manually	1	1	1	1		
	Scan each sheet as a new document in order to scan in and store multiple single sheet invoices in the stack, for example	1	1	1	1		
	Set scan settings based on your scanner's normal settings (e.g. scanning and color options)	1	1	1	1		
	Display devices dialog of the scanner so that all device-specific scan options can be used	1	1	1	1		

DocuWare Desktop Apps		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
The DocuWare Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App							
	Automatically attach scanned document to a new email	1	1	1	1		
DocuWare Import App: Monitoring Folders and Importing Files							
	<i>The DocuWare Import App offers basic features for monitoring folders in the file system and importing files into DocuWare. The additional "DocuWare Import" license allows additional and advanced features. You can learn about both the basic and advanced features in the separate "DocuWare Import" chapter. A further enhancement of the features is possible with the "Barcode & Forms" license, see the "Barcode & Forms" chapter</i>						
Import Configurations for DocuWare Scan App and Import App							
	Configurations are created and managed centrally and are immediately available on the Client	1	1	1	1		
	Create configurations	1	1	1	1		
	Copy existing configurations	1	1	1	1		
	Deactivate configurations, e.g. for test purposes	1	1	1	1		
	Assign access rights with ease: Assign a configuration directly to individual users or via roles to all users that hold the role	1	1	1	1		
	The person who created the configuration automatically receives user and administrator rights	1	1	1	1		
DocuWare Smart Connect-App							
	<i>See "Smart Connect" chapter (additional license)</i>	1	1	1	1		
Managing Connections to the DocuWare System							
	Establish a connection to the DocuWare system from which DocuWare Desktop Apps was installed	1	1	1	1	1	
	Activate connections	1	1	1	1	1	
	Remove connections from the connections list	1	1	1	1		

DocuWare Import							
DocuWare Import monitors selected directories and imports the files saved within them into DocuWare document trays or file cabinets. This way documents can be distributed to those responsible right when they are scanned, for example. The documents are automatically indexed and can be stored in their original format		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Monitoring Folders and Importing Documents							
	Monitor file folders for automatic import of files	1	1	1	1		
	Folder to monitor freely selectable (directory on local PC or server/network)	1	1	1	1		
	Import scanned documents via network scanner	1	1	1	1		
	Schedule a check of the import directory for new files: continuously or at flexibly configurable intervals (additional DocuWare Import license needed)	0	2	2	1		
	Check minimum age of files to prevent importing incomplete files	1	1	1	1		
	Store documents in document tray	1	1	1	1		
	Store documents in file cabinet	1	1	1	1		
	Automatic transfer of fixed entries as index words	1	1	1	1		
	Automatic transfer of dynamic entries as index words, e.g. user, file name, file extension, creation or modification date	1	1	1	1		
	Automatic reading of content from defined readout areas of the document. This content is used for indexing e.g. transferring the company name from an invoice into the respective index field (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	When indexing, you can combine fixed entries and dynamic entries with text readout areas in an index field (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Split the content of text readout areas to transfer separate parts to different index fields (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Replace the content of text readout areas with different text, e.g. replace the index word "Invoice" with the expanded term "Invoice – output" (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Define readout areas based on parts of text within the document (setting an anchor), e.g. the invoice amount, which is always at the end to the right of the word "Total" (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		

DocuWare Import							
DocuWare Import monitors selected directories and imports the files saved within them into DocuWare document trays or file cabinets. This way documents can be distributed to those responsible right when they are scanned, for example. The documents are automatically indexed and can be stored in their original format		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	Switch off text and barcode recognition at import in order to speed up document processing when this function is not required	0	1	1	0		
	Automatically detect electronic invoices as such with ZUGFeRD standard and process further (additional DocuWare Import license needed)	0	2	2	1		
	Index document with 1D and 2D barcodes (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Select barcode type to be searched for and used for indexing (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Filter barcodes with exact specification of characters	0	2	2	1		
	Split the content of barcode readout areas to transfer separate parts to different index fields (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Automatically overlay forms and letterheads, e.g. a scanned invoice form – can be done separately for first page and subsequent pages (additional DocuWare Barcode & Forms license needed)	0	2	2	1		
	Split multi-page documents after a fixed number of pages	0	2	2	1		
	Split multi-page documents according to text criteria defined using readout areas (e.g. "Page 1") (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Split multi-page documents after a blank readout area or if the content of the area changes, e.g. no page number (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Split multi-page documents after barcodes (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Automatic deletion of separating pages (additional DocuWare Import and Barcode & Forms licenses needed)	0	2	2	1		
	Embed electronic signature in PDF	1	1	1	1		
	Automatic recognition of the document language possible (except for Greek and Cyrillic languages)	1	1	1	1		

DocuWare Import DocuWare Import monitors selected directories and imports the files saved within them into DocuWare document trays or file cabinets. This way documents can be distributed to those responsible right when they are scanned, for example. The documents are automatically indexed and can be stored in their original format		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	Automatic rotation and deskewing of pages that have the wrong orientation or were scanned at an angle	1	1	1	1		
	Automatically attach processed document to a new email, e.g. electronic invoice	1	1	1	1		
	Also import metadata (indexing data) of documents in the DocuWare Control format when importing from external applications (additional DocuWare Import license needed)	2	2	2	1		
	Select sample document from file system or document tray	1	1	1	1		
	Initiate the import configuration from a document in the document tray and use the document as a sample document for a new import configuration	1	1	1	1		

DocuWare Barcode & Forms		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Barcode & Forms extracts 1D and 2D barcodes from documents, which are then stored in the DocuWare file cabinet via DocuWare Scan and DocuWare Import, and automatically adopts the information for indexing the documents							
Reading Out Text and Overlaying Forms/Letterheads							
<i>The Barcode & Forms features are available in the Import App of DocuWare Desktop Apps only in conjunction with the DocuWare Import license</i>							
Automatic reading of content from defined text readout areas of the document. This content is used for indexing, e.g. adopting the company name from an invoice into the respective index field		0	2	2	1		
When indexing, you can combine fixed entries and dynamic entries with text readout areas in an index field		0	2	2	1		
Replace the content of text readout areas with different text, e.g. replace the index entry "Invoice" with the expanded term "Invoice – output"		0	2	2	1		
Define readout areas based on parts of text within the document (setting an anchor), e.g. the invoice amount, which is always at the end next to the word "Total"		0	2	2	1		
Automatically overlay forms and letterheads, e.g. a scanned invoice form – can be done separately for first page and subsequent pages		0	2	2	1		
Split multi-page documents according to text criteria defined using readout areas (e.g. "Page 1")		0	2	2	1		
Split multi-page documents after a blank readout area or if the content of the area changes, e.g. no page number		0	2	2	1		
Automatic deletion of separating pages		0	2	2	1		
Reading Out 1D and 2D Barcodes							
Automatic reading of content from defined barcode readout areas of the document. This content is used for indexing		0	2	2	1		
Select barcode type to be searched and used for indexing		0	2	2	1		
Filter barcodes with exact specification of characters		0	2	2	1		
Split the content of barcode readout areas to transfer individual parts to different index fields		0	2	2	1		
Split multi-page documents after barcodes		0	2	2	1		
Define readout areas based on barcodes on the document (set anchors)		0	2	2	1		
Split multi-page documents after a fixed number of pages		0	2	2	1		

DocuWare Barcode & Forms		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Barcode & Forms extracts 1D and 2D barcodes from documents, which are then stored in the DocuWare file cabinet via DocuWare Scan and DocuWare Import, and automatically adopts the information for indexing the documents							
	Split multi-page documents after a blank readout area or if the content of the area changes	0	2	2	1		
	Automatic deletion of separating pages	0	2	2	1		
Supported 1D Barcode Types							
	2 of 5 (Interleaved, Datalogic, IATA, Industrial, Inverted, Matrix)	0	2	2	1	2	
	Codabar	0	2	2	1	2	
	Code 11 (USD 8)	0	2	2	1	2	
	Code 39	0	2	2	1	2	
	Code 93	0	2	2	1	2	
	Code 128 / EAN 128 / GS1-128	0	2	2	1	2	
	EAN 8	0	2	2	1	2	
	EAN 13	0	2	2	1	2	
	MaxiCode	0	2	2	1	2	
	MSI (Modified Plessey)	0	2	2	1	2	
	PharmaCode	0	2	2	1	2	
	Postal (Dutch KIX, Postnet, Australia Post, Royal Mail, Planet, Intelligent Mail)	0	2	2	1	2	
	RSS (RSS 14, RSS 14 Stacked, RSS Expanded, RSS Expanded Stacked)	0	2	2	1	2	
	Telepen	0	2	2	1	2	
	UPC/A	0	2	2	1	2	
	UPC/E	0	2	2	1	2	
Supported 2D Barcode Types							
	Aztec	0	2	2	1	2	
	DataMatrix	0	2	2	1	2	
	MicroQR	0	2	2	1	2	
	PDF417	0	2	2	1	2	
	QR	0	2	2	1	2	

DocuWare Smart Connect		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
You can use Smart Connect to connect to almost any program you like with the DocuWare document pool without any programming							
DocuWare Integration Without Programming							
	Simple configuration in four steps with configuration wizards	2	2	2	1	2	
	Configuration program can be called up directly from DocuWare	2	2	2	1	2	
	Transfer of index words from any areas (including tables) of the third-party application	2	2	2	1	2	
	One or more search buttons shown in the relevant application	2	2	2	1	2	
	"Smart Index" menu entry in the DocuWare store or info dialog. This allows index information to be adopted from an external program	2	2	2	1	2	
	Can be used in multi-user environments, e.g. a terminal server environment	2	2	2	1	2	
Smart Connect Search: Finding Documents Directly from Third-Party Applications with One Click							
	Run a configured search using the displayed search button, keyboard shortcut, or the tray menu of DocuWare Desktop Apps	2	2	2	1	2	
	Option to use additional pre-defined index words	2	2	2	1	2	
	Use place holders when entering a search term	2	2	2	1	2	
	When extracting content from third-party applications, you can simply select different content with the mouse and then use it for the Smart Connect Search in DocuWare	2	2	2	1	2	
Smart Connect Indexing: Adding Search Terms to Documents from Third-Party Applications							
	Run Smart Index from a button displayed in the DocuWare store or info dialog	2	2	2	1	2	
	Option to use additional pre-defined index words	2	2	2	1	2	
	When indexing, you can combine fixed entries, dynamic entries, and text readout areas in an index field	2	2	2	1	2	
	Index during document archiving or as post-indexing of documents already archived	2	2	2	1	2	
Configuring Smart Connect							
	Create Smart Search configurations	2	2	2	1	2	
	Create Smart Index configurations	2	2	2	1	2	
	Copy existing Smart Connect configurations	2	2	2	1	2	
	Use selected text when extracting content from any area	2	2	2	1	2	
	Use place holders in a search	2	2	2	1	2	
	Automatic recognition of the text language possible (except for Greek and Cyrillic languages)	2	2	2	1	2	

DocuWare Smart Connect You can use Smart Connect to connect to almost any program you like with the DocuWare document pool without any programming		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	Automatic selection of the optimum recognition technology for reading out text	2	2	2	1	2	

DocuWare Mobile		iPhone, iPod Touch	iPad	Android devices, BlackBerry 6 (with touch function from BlackBerry 10)	Windows Phone 7	Windows 8/RT devices
With DocuWare Mobile you can access DocuWare directly from your mobile device – whether it is an iPhone, iPad, iPod Touch, smartphone with Android or a Windows Phone or BlackBerry. You can use the Windows 8 app on an RT tablet or on a PC. For DocuWare Mobile, you require DocuWare with the server version PROFESSIONAL or ENTERPRISE. The DocuWare Cloud license includes DocuWare Mobile						
Retrieving Documents						
	Display documents in the DocuWare Viewer specially adapted to mobile devices – regardless of the format in which the documents were archived. Including deep zoom: powerful zooming of document areas	2	2	2	2	2
	Call up search dialogs, task lists, and select lists, searching by select list and selective select list	2	2	2	2	2
	Show indexing data	2	2	2	2	2
Editing Documents						
	Control workflows based on Task Manager using mobile devices: Support of the DocuWare stamp functions (keyword fields not supported; Windows 8/RT: including additional assignment of keyword fields)	2	2	2	2	2
	Send documents using iPhone or iPad	2	2			
	PDF files can be transferred to iBooks on an iPad. This enables optimum preparation for a meeting		2			
Security						
	Transfer documents from DocuWare Server to DocuWare Mobile using HTTPS (secure encryption of the protocol using SSL)	2	2	2	2	2

DocuWare PaperScan				
The free PaperScan app transforms your iPhone or iPad into a mobile document scanner. The app photographs documents and saves the guaranteed sharp scans to the desired location, where they can be further processed. It is the ideal solution for easily reporting expenses, for example		iPhone	iPad	Android devices*
Scanning and Storing Documents				
	Scan documents	1	1	1
	Trigger automatically, i.e. without changing your hand position or needing a second hand to stabilize (from device versions iPhone 4s, iPad 3, iPad Mini)	1	1	1
	Automatically align document edges	1	1	1
	Automatically cut out scan background	1	1	1
	Manually crop scans	1	1	1
	Rotate scans	1	1	1
	Convert color scans to grayscale	1	1	1
	Scroll through documents	1	1	1
	Add scan to an existing document	1	1	1
	Change document name	1	1	1
	Store documents in document tray (additional DocuWare Mobile license needed)	1	1	1
	Store documents in Dropbox	1	1	1
	Upload documents to Google Drive	1	1	1
	Print documents with AirPrint	1	1	1
	Generate multi-page PDFs	1	1	1
	Delete individual pages of documents	1	1	1
	Send documents by email	1	1	1
	Store documents in a file cabinet (only with additional DocuWare Mobile license and PROFESSIONAL or ENTERPRISE server version)	2	2	2
	Connect PaperScan App easily to DocuWare via QR code	1	1	1

*Find information about tested Android devices on
<http://www.paperscanapp.com>

DocuWare Task Manager Task lists in Web Client and automatic email notifications ensure an optimum workflow		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Task Lists in Web Client							
	Practical lists that gather together the new documents to be processed	0	2	2	1	2	
	Task lists can be defined using index entries and assigned to users (using DocuWare Administration)	0	2	2	1	2	
	Automatic updating of task lists	0	2	2	1	2	
	Link to a task list can be saved in the browser or on the desktop	0	2	2	1	2	
Automatic Email Notification							
	Receive an email notification as soon as a new document is available for processing	0	2	2	1		
	The email notification contains links to the documents to be processed or to a task list	0	2	2	1		
	Any number of templates can be created for email notifications	0	2	2	1		
	Scheduling: set email notifications to be submitted once a day or during a certain period	0	2	2	1		
Configuration: Email Notifications							
	Create email notifications and assign to individual users	0	2	2	1	2	
	Create email notifications and release for subscription	0	2	2	1	2	
	Define the trigger for email notifications using the content of the DocuWare index fields	0	2	2	1	2	
	Email notifications can be set up for newly archived documents, for documents with modified indexed words or for both options simultaneously	0	2	2	1	2	
	Define the subject and text content of the email notification	0	2	2	1	2	
	Define the scheduling for email notifications	0	2	2	1	2	

DocuWare Workflow Manager		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
With DocuWare Workflow Manager you can create clear rules for document handling in your company: The work processes are controlled using document-based workflows and implemented in your DocuWare system							
Workflow Task Lists in DocuWare							
	Practical lists that gather together the new documents to be processed and the tasks associated with them – organized by workflow onto tabs e.g. "Incoming invoices"	0	2	2	1	2	
	Edit tasks in DocuWare: e.g. enter decisions directly in a form or set an appropriate stamp – or use a form and additional automatic stamping	0	2	2	1	2	
	Reassign tasks to other users, roles, or substitution rules	0	2	2	1	2	
	Mark tasks "read" or "unread"	0	2	2	1	2	
	Specify "out of office" status directly in DocuWare so that tasks will be forwarded to substitute	0	2	2	1	2	
	Special controller list: Within a workflow, the controller has an overview of all tasks that are still open for the people involved. He can take control at any time and stop running workflow instances where necessary	0	2	2	1	2	
	List structuring: Individual design of task lists enables optimum clarity	0	2	2	1	2	
	Display workflow history from result list and viewer – of the document that was or is part of a workflow	0	2	2	1	2	
	One-click indexing for working with workflow forms	0	2	2	1	2	
	Integrate a task list into any application with a URL	0	2	2	1	2	
Design Workflows and Define Tasks with Workflow Designer							
	Define substitution rules in case one or more people responsible are out of office (in DocuWare Administration)	0	2	2	1		
	Publish workflow, providing it to the authorized users, roles, or substitution rules	0	2	2	1		
	Remove publication of a workflow	0	2	2	1		
	Specify a calendar with work times for the organization (in DocuWare Administration)	0	2	2	1		
	Define time-based escalations for tasks: 1. Period to remind those responsible, 2. Overdue period for task	0	2	2	1		
	Automatic forwarding of tasks if the time limit is exceeded (timeout)	0	2	2	1		
	Define tasks and parallel tasks	0	2	2	1		
	Assign tasks and parallel tasks to users, roles, or substitution rules	0	2	2	1		

DocuWare Workflow Manager							
With DocuWare Workflow Manager you can create clear rules for document handling in your company: The work processes are controlled using document-based workflows and implemented in your DocuWare system		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	Set triggers for workflow instances, e.g. storing a new document or modifying index values for a document that has already been stored	0	2	2	1		
	Determine decision-making options that should be available to the person responsible during a task, e.g. approving or rejecting an invoice	0	2	2	1		
	Assemble form into which the responsible person should enter data (Field, Field name, Field mask, Pre-filled with, Select list, Variable)	0	2	2	1		
	Inform employees via email notification that a new task has been assigned to them	0	2	2	1		
	Remind employees via email notification that a task is due or overdue	0	2	2	1		
	Attach document to email notification, e.g. for employees with no access to the DocuWare file cabinet	0	2	2	1		
	Opening tasks from the email notification	0	2	2	1		
	Send employees information about the achievement of project milestones via email from workflow	0	2	2	1		
	Define termination conditions for a parallel task. For example, if multiple users are supposed to approve partial sums on an invoice but one of them approves the full sum, the task should no longer be displayed to the other user	0	2	2	1		
	Define conditional commands, such as if invoices above a certain amount need to be approved by a second party	0	2	2	1		
	Define variables for workflows	0	2	2	1		
	Use variables when prefilling forms and reminder date	0	2	2	1		
	Use index values in automatic steps, e.g. have the departmental manager's name entered via the name of the employee who makes a vacation request	0	2	2	1		
	Automatically write data to index fields, e.g. in the case of incoming invoices, save the invoice status in the index data too	0	2	2	1		
	Assign data from external sources so that calculations can be run automatically, e.g. transfer information from the accounting system into a workflow	0	2	2	0		
	Assign data from an external source straight to a variable	0	2	2	0		

DocuWare Workflow Manager		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
With DocuWare Workflow Manager you can create clear rules for document handling in your company: The work processes are controlled using document-based workflows and implemented in your DocuWare system							
	Call up Web Service to read out external data, e.g. automatically enter invoice amount in form	0	2	2	1		
	Overview table of all workflows specifying assigned archive, creation data, versions, active instances of every workflow, and other information	0	2	2	1		
	Filter workflow overview by search	0	2	2	1		
	Show workflow versions ("development history") in separate list	0	2	2	1		
	Copy workflow version and generate new version, to change its functionality, for example	0	2	2	1		
	Display active instances of a workflow in a separate list: Shows which activity is currently being processed	0	2	2	1		
	Flow diagram layer for each individual workflow	0	2	2	1		
	Add workflow activities (tasks, decisions, etc.) into a flow diagram using drag & drop	0	2	2	1		
	Set colors for workflow steps (outputs) in a flow diagram	0	2	2	1		
	Create, edit, copy, and save workflow configuration	0	2	2	1		
	Clear assignment: Workflow configuration must be assigned to a DocuWare file cabinet	0	2	2	1		
	Simulate workflow with the option to change variables	0	2	2	1		
	Stop running workflow instance, e.g. for test purposes	0	2	2	1		
	Completely delete workflow from system	0	2	2	1		
	Structure the workflow task list shown in DocuWare: Specify columns with the document's index data, workflow system variables, and global workflow variables; with structure preview	0	2	2	1		
	Permissions as controller and designer	0	2	2	1		
Substitution Rules, Out of Office, and Other Settings							
	<i>See chapter "DocuWare Administration"</i>						

Intelligent Indexing		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Intelligent Indexing saves you from manual indexing. DocuWare classifies documents and automatically searches them for relevant index words. Users' confirmation or corrections automatically feed into the self-learning system, which can use this feedback to independently assign the index words after a brief learning period							
Managing Intelligent Indexing							
	Classify documents in a document tray and automatically suggest index words based on known documents whose indexing was already "learned"	2	2	2	1	2	0
	Automatically store documents that have been evaluated by Intelligent Indexing	2	2	2	1	2	0
	Color-code documents and individual index words by the level of confidence that the suggested index words are correct	2	2	2	1	2	0
	"Train" Intelligent Indexing: Correct suggested index words as needed to "teach" the system the indexing pattern so it knows it the next time	2	2	2	1	2	0
	Compare results with existing data from other applications, e.g. ERP, and filter them	2	2	2	1	2	0
	Run documents in the document tray through Intelligent Indexing again	2	2	2	1	2	0
	Document types can be freely named, i.e. company-specific terms are possible	2	2	2	1	2	0
	11 standard index fields (Document type, Date, Company, Contact, Customer number, Payment date, Document number, Amount, VAT ID, Subject) for automatic indexing based on crowd learning	2	2	2	1	2	0
	8 user-defined index fields of various types (text, date, numeric) for automatic indexing of individually relevant index words	2	2	2	1	2	0
	Automatic recognition of the document language possible (except for Greek and Cyrillic languages)	2	2	2	1	2	0
Managing Intelligent Indexing							
	Optionally enable and disable Intelligent Indexing for specified organizations (in DocuWare configuration)	2	2	2	0	2	0
	Use Intelligent Indexing only within a locally installed on-premise DocuWare system	0	2	2	0	2	0
	Reset configurations	2	2	2	1	2	0

DocuWare Connect to Outlook		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Use Connect to Outlook to conveniently archive your emails directly in DocuWare from Microsoft Outlook and use quick search to access stored emails							
Archiving Emails							
	Store in DocuWare file cabinet		2	2	1	2	
	Store in DocuWare document tray		2	2	1	2	
	Emails can be archived in the following formats: MSG (Outlook), DOC (Word), RTF, PDF, or PDF/A		2	2	1	2	
	Integrated DocuWare menu bar and context menu in Outlook		2	2	1	2	
	Store emails using the DocuWare menu bar		2	2	1	2	
	Store emails using the DocuWare context menu		2	2	1	2	
	Send and store emails from MS Outlook in a single step (not supported in a terminal server environment)		2	2	1	2	
	Archive emails with file attachments; emails can be marked as archived with the "DocuWare" category		2	2	1	2	
	Archive emails with file attachments and only delete the attachment		2	2	1	2	
	Archive emails with file attachments and delete them completely		2	2	1	2	
	Configure storage type: Email and appended files (show email first), email and appended files (show attachment first), or only appended files		2	2	1	2	
	Storage type for individual email can be selected regardless of the configuration: Email and appended files (show email first), email and appended files (show attachment first), or only appended files		2	2	1	2	
	Emails are marked in the result list with a specific icon		1	1	1	1	
	Any number of different storage destinations can be defined: the emails are sent to their specific destination according to the configuration selected		2	2	1	2	
	After the client has logged in, monitored folders are automatically created; store using these monitored folders – emails are deleted (not supported in a terminal server environment)		2	2	1	2	
	Storage with and without store dialog		2	2	1	2	
	If mandatory fields are not set, the store dialog always opens (even with other settings)		2	2	1	2	
	Identification of mandatory fields with asterisks (*) in store and info dialogs		2	2	1	2	

DocuWare Connect to Outlook Use Connect to Outlook to conveniently archive your emails directly in DocuWare from Microsoft Outlook and use quick search to access stored emails		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Accessing Archived Documents – Using Quick Search							
	Find documents archived in DocuWare connected to an email at the click of a button (e.g. from the same sender)		2	2	1	2	
	If only the attachments of an email were deleted in Outlook; access these attachments again at the click of a button		2	2	1	2	
	Access DocuWare task lists from Outlook (additional Task Manager license needed)		2	2	1	2	
Configuring Email Storage and Quick Search							
	Any number of storage configurations can be set centrally. They can be assigned directly to users or via certain roles		2	2	1	2	
	Any number of quick search configurations can be set centrally. They can be assigned directly to users or via certain roles		2	2	1	2	
	Administrators can create storage and quick search configurations for all users		2	2	1	2	
	Non-administrators (basic users) can create storage and quick search configurations for themselves if they have the necessary rights		2	2	1	2	
	Use fixed values as index words for archiving		2	2	1	2	
	Select email properties as index words for archiving (sender, subject, etc.)		2	2	1	2	
	Use predefined entries as index words for archiving (CURRENTDATE, etc.)		2	2	1	2	
	Select information about the recipient/sender from the Outlook contact (name, company, etc.) as index words for archiving		2	2	1	2	
	Select information from other DocuWare file cabinets as index words; email addresses can be used as match code		2	2	1	2	
	Support of other external SQL databases (MySQL, MSSQL, Oracle) for automatic expansion of index words: email addresses can be used as match code		2	2	1	2	
	Storage with and without store dialog		2	2	1	2	
	If mandatory fields are not set, the store dialog always opens (even with other settings)		2	2	1	2	
	Identification of mandatory fields with asterisks (*) in store and info dialogs		2	2	1	2	
	Use fixed values as index words for quick searches		2	2	1	2	

DocuWare Connect to Outlook Use Connect to Outlook to conveniently archive your emails directly in DocuWare from Microsoft Outlook and use quick search to access stored emails		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Select storage type: Email and appended files (show email first), email and appended files (show attachment first), or only appended files			2	2	1	2	
Select email properties as index words for quick searches (sender, subject, etc.)			2	2	1	2	
Use predefined entries as index words for quick searches (e.g. CURRENTDATE (-30) for the last 30 days)			2	2	1	2	
Select information about the recipient/sender from the Outlook contact (name, company, etc.) as index words for quick searches			2	2	1	2	
In the storage configurations, select a DocuWare keyword up to 64 times in the "Store Target" step, thereby transferring lots of values into the keyword field when emails are archived			2	2	1	2	
In quick search, use the storage date as a search criterion, thus limiting the results, for example, to the last 14 days			2	2	1	2	

DocuWare Connect to Mail		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
With Connect to Mail, you can conveniently load and archive the emails from your Google account into DocuWare							
Archiving Emails							
	Call up emails from Gmail		2	2	1	2	
	Call up emails from Microsoft Exchange Server		2	2	1	2	
	Call up emails from IMAP server		2	2	1	2	
	Store in DocuWare file cabinet		2	2	1	2	
	Store in DocuWare document tray		2	2	1	2	
	Archive emails in original EML format or as PDF		2	2	1	2	
	Delete emails with attachments or move them to another folder, both emails with and without attachment		2	2	1	2	
	Any number of different storage destinations can be defined: The emails are sent to their specific destination according to the monitored folder selected		2	2	1	2	
Configuring Email Storage							
	Any number of storage configurations can be set centrally. They can be assigned directly to users or via certain roles		2	2	1	2	
	Administrator can create storage configurations for all users		2	2	1	2	
	Use fixed values as index words for archiving		2	2	1	2	
	Select email properties as index words for archiving (sender, subject, etc.)		2	2	1	2	
	Select storage type: Email and appended files (show email first), email and appended files (show attachment first), email without attachment or only appended files		2	2	1	2	
	Automatic download of images can be disabled, e.g. for protection against phishing emails		2	2	1	2	

DocuWare Autoindex		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Autoindex imports information from other applications, such as financial accounting programs, and sends it to DocuWare as index criteria							
Index Enhancement via External Data Sources							
	Select an external data source: DocuWare file cabinet, database table, database view, SQL command	0	2	2			
	Select an external data source: DocuWare file cabinet, database table in separate DocuWare Online database (contains data of own file cabinets) - no access to On-Premise-database server; free SQL commands are not supported				1		
	With file as external data source: read/write access or read-only access, move or delete file on completion of workflow. Data must be organized using separators or fixed field lengths	0	2	2	1		
Index Enhancement via External Records							
	Select whether to find external records associated with DocuWare documents, or DocuWare documents associated with external records	0	2	2	1		
	If more than one external record is found for a document, you can choose either to process only the first record and make an entry in the log file or process all external records (index is expanded using the first external record)	0	2	2	1		
	If more than one document is found for an external record, you can choose either to process only the first document and make an entry in the log file or to process all documents	0	2	2	1		
	Delete external records after processing. This ensures that an external record is only used once	0	2	2	1		
	Create an external record if no external record can be found for a document (not supported for table views)	0	2	2	0		
	Create a record in DocuWare if no document can be found for an external record	0	2	2	1		
	Filter on documents in the DocuWare file cabinet	0	2	2	1		
	Filter on records in the external data source	0	2	2	1		
Index Enhancement via External Data Fields							
	Assign external data fields to DocuWare index fields	0	2	2	1		
Index Enhancement Settings							
	Add index words always or only when fields are empty	0	2	2	1		
	Add index words from contents of external record, using fixed or dynamic entries	0	2	2	1		
	Add or change field contents of the external record using index words of the DocuWare document using fixed or dynamic entries	0	2	2	1		

DocuWare Autoindex Autoindex imports information from other applications, such as financial accounting programs, and sends it to DocuWare as index criteria		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
	Special indexation of documents without associated external record (only possible with ODBC driver; not possible for views in databases)	0	2	2	1		
Scheduling							
	Start the Autoindex workflow using a time trigger, manually or by means of a file event (change to the index file that is used as an external data source)	0	2	2	1		

DocuWare Request		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Request makes complete file cabinets or selected documents available on external media (CD/DVD, etc.) as a ZIP file. Documents can be read without a DocuWare Client. Use of DocuWare Request may be linked to additional costs for DocuWare Cloud							
Portable File Cabinets: Use DocuWare as a ZIP File on CD/DVD, External Hard Disk, or USB Stick							
	Search for documents via index words as in DocuWare (also fulltext search) - including document content and index fields	1	1	1	1		
	Open documents in standard viewers; PDF viewer available within Request in case no PDF viewer is installed on the respective device	1	1	1	1		
	Transfer and display the document versions for file cabinets that have version management enabled	1	1	1	1		
	Display workflow history for documents that were or are part of a workflow (only in combination with Workflow Manager)	1	1	1	1		
DocuWare Request Options							
	Open Request configurations from DocuWare and from DocuWare Configuration	1	1	1	1	1	
	Adopt a file cabinet or individual documents from it	1	1	1	1	1	
	Fine filter function for defining documents that are to be transferred; filter for example by document type, period or company	1	1	1	1	1	
	Include workflow history for a document (Workflow Manager license needed)	2	2	2	1	2	
	Export documents into Request file cabinet	1	1	1	1	1	
	Export documents in original formats or converted into PDF, optionally with comments retained	1	1	1	1	1	
	Transfer the fulltext catalog (fulltext search)	1	1	1	1	1	
	Search fields based on assigned result or task list	1	1	1	1	1	
	Scheduling of provision of data, e.g. making a Request file cabinet available on the first of each month	1	1	1		1	
	Jobs can be created in the Web Client or in the DocuWare Configuration. Creating of the Request file cabinets can be started in the DocuWare Online Portal				1		

DocuWare URL Integration		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Integrate individual elements of DocuWare into any program using URL integration: an Internet address (URL) is generated and is displayed in a browser from the application							
Configuring URL Integration							
	URL definition based on specific, predefined parameters	1	1	1	1	1	
	Define complex, valid URLs with the aid of encoding (Base64url Encoding)	1	1	1	1	1	
	Integrate DocuWare in a separate browser window or in a defined frame	1	1	1	1	1	
	Access the user interfaces of a DocuWare configuration in Web or Windows applications; possible user interfaces: selected search dialog, store dialog, result list, info dialog, Viewer, document trays, workflow task list, workflow task, Task Manager list, document history, special document	1	1	1	1	1	
	Select the language for result list and/or viewer	1	1	1	1	1	
	Three views possible: Open DocuWare Viewer directly; open result list and then open the Viewer; open a file in the plug-in or download the file	1	1	1	1	1	
	Transfer any predefined search criteria via URL	1	1	1	1	1	
	Access via guest login, Windows login or DocuWare login	1	1	1	1	1	
	Encryption of the URL via which the integration in DocuWare was called up	1	1	1	1	1	
	Login for URL integration via Windows account or DocuWare login page	1	1	1	0	1	
	Login for URL integration via Trusted Login, Windows account or DocuWare login page	1	1	1	1	1	
	DocuWare login can be stored in a cookie. This cookie can be used to log into the DocuWare System for all further URL calls	1	1	1	1	1	

Software Developer Kit (SDK)		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
<p>With its Software Developer Kit (SDK), DocuWare provides specific programming interfaces: The DocuWare features can be accessed from other applications via URL integration and Web services, as well as via powerful GAPI and JAPI interfaces</p>							
DocuWare Platform Service							
	<p>A REST-based interface that provides access to DocuWare systems. It is used within DocuWare for connecting mobile devices with DocuWare Mobile, for example, but can also be used for connecting external programs. For details see:</p> <p>https://help.docuware.com/sdk/platform/</p>	1	1	1	1		
Custom Validation							
	<p>DocuWare offers the possibility to carry out plausibility checks on server-side index entries by means of general or client-specific validation libraries. The plausibility check is implemented using .NET 2.0 DLLs that can contain any number of checks. Further details about validation are available in the Knowledge Center:</p> <p>http://help.docuware.com/en/#t56478</p>	1	1	1	0		
GAPI							
	<p>.Net interface to access files on the DocuWare server (supported up to DocuWare version 6.7): For a GAPI tutorial, go to the Knowledge Center:</p> <p>http://help.docuware.com/en/#t56479</p>	1	1	1	1		
Web Services							
	<p>Web Services allow interoperability between the DocuWare servers, which have been developed on the basis of .NET, for example with the Java world. The Web Services build on the DocuWare GAPI (General Application Programming Interface) (supported up to DocuWare version 6.7). For a Web Services tutorial, go to the Knowledge Center:</p> <p>http://help.docuware.com/en/#t56561</p>	1	1	1	1		
JAPI							
	<p>JAPI (Java Application Programming Interface) enables access to DocuWare services using JAVA technology (supported up to DocuWare version 6.7):</p> <p>http://help.docuware.com/en/#t56481</p>	1	1	1	1		

DocuWare Connect to OKI Scanning and archiving in a single step – using the supported multifunctional digital copiers and scanners from OKI		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Archiving via OKI Devices							
	Storing of scanned documents directly in the DocuWare file cabinet and document trays, entry of index words directly via the store dialog on the OKI device	2	2	2	0		
	Automatic rotating and aligning of pages that are scanned in the wrong direction or at an angle	2	2	2	0		
	Background login with fixed predefined user (e.g. to be able to store documents quickly and easily)	2	2	2	0		
	Select the store dialogs for indexing documents that are shown on the OKI device	2	2	2	0		
	Define special store dialogs for this application in DocuWare Web Client Settings	2	2	2	0		
	All DocuWare store dialog options (except field masks) available in this application, including fixed hidden entries or special select lists for certain fields	2	2	2	0		
	Select index entries from select lists (also from selective select lists) or enter them via a soft keyboard	2	2	2	0		
	Main scan settings of OKI device usable: Scan in duplex or simplex mode; scan in color or B&W	2	2	2	0		
	Search in the file cabinet and print the retrieved documents based on the individual user rights. Select the search dialogs that are offered on the OKI device	2	2	2	0		

DocuWare Connect to SAP With the SAP-certified interface Connect to SAP, DocuWare has enhanced SAP with functions for archiving documents and data		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Audit-Compliant Archiving of SAP Documents							
	Support for SAP barcode standard scenarios for incoming documents	0	2	2	0		
	Integration of archived documents in SAP Business Workflow scenarios	0	2	2	0		
	Store and display print lists	0	2	2	0		
	Store and display archive files from SAP data archiving	0	2	2	0		
	Transfer documents from SAP	0	2	2	0		
	Access to SAP documents even without SAP					1	1
	Full functionality from ArchiveLink version 4.5	0	2	2	0		

DocuWare Connect to SharePoint Connect to SharePoint connects Microsoft Office SharePoint to the DocuWare document management system		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Audit-Compliant Archiving in DocuWare Direct from SharePoint							
	DocuWare as SharePoint Records Center	0	2	2	0		
	Audit-compliant long-term archiving for SharePoint documents	0	2	2	0		
	Manual storage of documents from SharePoint in DocuWare using "send to"	0	2	2	0		
	Automatic storage from SharePoint in DocuWare using programmable custom policies	0	2	2	0		
	Archive documents in DocuWare direct from SharePoint	0	2	2	0		
	Rule-based storage of documents from SharePoint in DocuWare using individually programmed custom actions and custom policies	0	2	2	0		
	Storage in original format	0	2	2	0		
Searching for Archived Documents in SharePoint							
	Combined search (federated location) in SharePoint and DocuWare using open search	0	2	2	0		
	Separate DocuWare results area on the SharePoint user interface	0	2	2	0		
	Display DocuWare results direct from SharePoint	0	2	2	0		
	Access DocuWare via Single Sign-On (ID checked against Windows Active Directory)	0	2	2	0		
Integrating DocuWare in SharePoint							
	Switch directly from SharePoint to DocuWare via Single Sign-On (ID checked against Windows Active Directory)	0	2	2	0		
	Separate search in DocuWare for index words or fulltext with all available DocuWare functions	0	2	2	0		
Administration of CONNECT to SharePoint							
	Administration via Connect-to-SharePoint Web Administration	0	2	2	0		
	Type of login: manual, fixed user or Windows user	0	2	2	0		
	Mapping definition for sending index data from SharePoint to index fields in DocuWare file cabinets	0	2	2	0		
	Definition of routing types: which SharePoint document type is stored in which DocuWare file cabinet?	0	2	2	0		

DocuWare Connect to Ricoh, Version 1		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Scanning and archiving in a single step – using the supported multifunctional digital copiers and scanners from Ricoh							
Archiving via Ricoh Devices							
	Store scanned documents directly in the DocuWare file cabinet or document tray, enter index words directly via the store dialog on the Ricoh device	2	2	2	0		
	Log in with fixed predefined user or individual login for each user	2	2	2	0		
	Configure special store dialogs for use with Ricoh Option of fixed entries and read-only fields in the store dialog	2	2	2	0		
	Store all scanned documents as a multiple-page TIFF or PDF, or create a single-page TIFF (b/w) or JPEG (color) or PDF for each document	2	2	2	0		
	Resolution: 100, 200, 300, 400 or 600 dpi	2	2	2	0		
	Select the store dialog for indexing documents that is shown on the Ricoh device	2	2	2	0		

DocuWare Connect to Ricoh, Version 2		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Scanning and archiving in a single step – using the supported multifunctional digital copiers and scanners from Ricoh							
Archiving via Ricoh Devices							
	Store scanned documents directly in the DocuWare file cabinet or document tray, enter index words directly via the store dialog on the Ricoh device	2	2	2	1		
	Log in with fixed predefined user or individual login for each user	2	2	2	1		
	Easy installation via DocuWare configuration, including client installation on multifunction printer	2	2	2	1		
	Configure special store dialogs for use with Ricoh Option of fixed entries and read-only fields in the store dialog; Selection lists simplify completion of index fields, e.g. if scanned document needs to be stored straight from device to file cabinet	2	2	2	1		
	Store all scanned documents as a multiple-page TIFF or PDF, or create a single-page TIFF (b/w) or JPEG (color) or PDF for each document	2	2	2	1		
	Resolution: 100, 200, 300, 400 or 600 dpi	2	2	2	1		
	Select the store dialog for indexing documents that is shown on the Ricoh device	2	2	2	1		

DocuWare Connect to Sharp, Version 2		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Scanning and archiving in a single step – using the supported multifunctional digital copiers and scanners from Sharp							
Archiving via Sharp Devices							
	Store scanned documents directly in the DocuWare file cabinet, enter index words directly via the store dialog on the Sharp device	2	2	2	0		
	Automatic rotating and aligning of pages that are scanned in the wrong direction or at an angle	2	2	2	0		
	Background login with fixed predefined user (e.g. to be able to store documents quickly and easily)	2	2	2	0		
	Login possible with RFID or smart card (additional software needed)	2	2	2	0		
	Store documents being scanned in DocuWare file cabinets and document trays	2	2	2	0		
	Select the store dialogs for indexing documents that are shown on the Sharp device	2	2	2	0		
	Define special store dialogs for this application in DocuWare Administration	2	2	2	0		
	All DocuWare store dialog options (except field masks) available in this application, including fixed hidden entries or special select lists for certain fields	2	2	2	0		
	Select index entries from select lists (also from selective select lists) or enter them via a soft keyboard	2	2	2	0		
	Access to the Sharp device's main scanner settings: scan in duplex or simplex mode, scan in color or B&W; PDF, TIFF and JPEG file formats	2	2	2	0		
	Search in the file cabinet and print the retrieved documents based on the individual user rights. Select the search dialogs that are offered on the Sharp device	2	2	2	0		

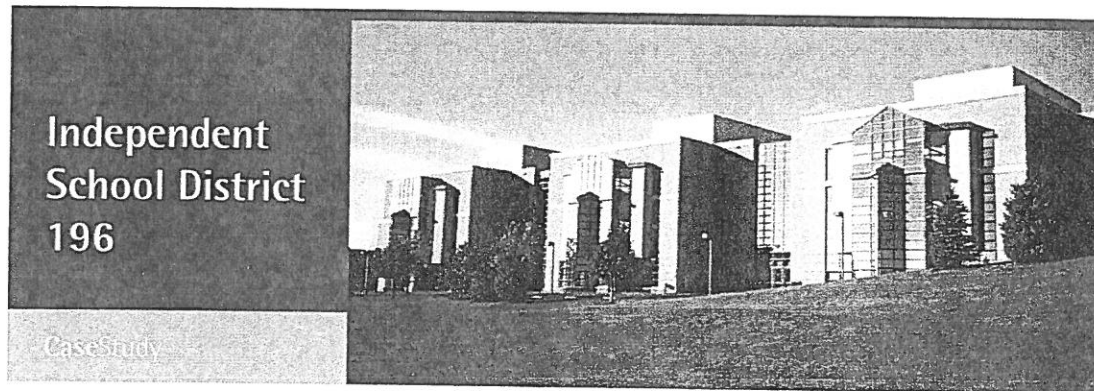
DocuWare Connect to Toshiba, Version 1		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Scanning and archiving in a single step – using the supported multifunctional digital copiers and scanners from Toshiba							
Archiving via Toshiba Devices							
	Store scanned documents directly in the DocuWare file cabinet or document tray, enter index words directly via the store dialog on the Toshiba device	2	2	2	0		
	Define special fields for index assignment on the Toshiba device display	2	2	2	0		
	Field entries: numerical, decimal, text or from a specially defined select list	2	2	2	0		
	Mandatory fields	2	2	2	0		
	Fixed, hidden entries	2	2	2	0		
	Minimum and maximum text length	2	2	2	0		
	Minimum and maximum value for numerical fields	2	2	2	0		
	Possible formats for scan files: TIFF, PDF, and XPS in each case as single or multipage, and JPEG	2	2	2	0		
	Other scan settings in accordance with the Toshiba devices	2	2	2	0		
	Up to 2,400 Enhanced Scan Templates can be defined per device	2	2	2	0		
	Select the DocuWare file cabinet or document tray in which the scanned documents are to be stored	2	2	2	0		
	Assign fields defined in the Enhanced Scan Template to DocuWare fields	2	2	2	0		
	Assign protocol fields for the scan to DocuWare fields	2	2	2	0		

DocuWare Connect to Toshiba, Version 2		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Scanning and archiving in a single step – using the supported multifunctional digital copiers and scanners from Toshiba							
Archiving via Toshiba Devices							
	Store scanned documents directly in a DocuWare file cabinet and document trays, enter index words directly via the store dialog on the Toshiba device	2	2	2	0		
	Automatic rotating and aligning of pages that are scanned in the wrong direction or at an angle	2	2	2	0		
	Background login with fixed predefined user (e.g. to be able to store documents quickly and easily)	2	2	2	0		
	Select the store dialogs for indexing documents that are shown on the Toshiba device	2	2	2	0		
	Define special store dialogs for this application in DocuWare Configuration	2	2	2	0		
	All DocuWare store dialog options (except field masks)	2	2	2	0		
	Select index entries from select lists (also from selective select lists) or enter them via a soft keyboard	2	2	2	0		
	Main scan settings of Toshiba device usable: Scan in duplex or simplex mode, in color or black and white	2	2	2	0		
	Search in the file cabinet and print the retrieved documents taking account of the individual user rights. Select the search dialogs to be offered in the Toshiba device.	2	2	2	0		

DocuWare Connect to Xerox Scanning and archiving in a single step – using the supported multifunctional digital copiers and scanners from Xerox		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	DocuWare Cloud	Web Client	Windows Explorer Client
Archiving via Xerox Devices							
	Store scanned documents directly in the DocuWare file cabinet, enter index words directly via the store dialog on the Xerox device	2	2	2	0		
	Background login with fixed predefined user or individual login for each user	2	2	2	0		
	Users can select from list of store dialogs displayed on the Xerox device	2	2	2	0		
	Define special store dialogs in DocuWare Administration	2	2	2	0		
	All DocuWare store dialog options, including fixed hidden entries or special select lists for certain fields	2	2	2	0		
	Select index entries from select lists or enter them via a soft keyboard	2	2	2	0		
	Access the Xerox device's main scanner settings: scan in duplex or simplex mode; scan in color or B&W; Resolution: 100-600 dpi	2	2	2	0		

MS SQL 2012 for DocuWare Seamless Connection between SQL Server and DocuWare		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	Web Client	Windows Explorer Client
Integration of MS SQL Server						
	Up to 64 SQL Server instances per SQL Server and over 32,000 databases per instance	2	2	2		
	Administer settings centrally in the Management Studio	2	2	2		
	Simple and reliable backup and restore	2	2	2		
	Backup as scheduled tasks: complete database backup and/or differential backup	2	2	2		
	High-availability system with easy-to-set-up and configurable mirrored SQL Server, no additional license required. (Microsoft sets restrictions on the physical distance between the server and mirrored server. For exact details, please contact Microsoft.)	2	2	2		
	Cluster system also possible with additional license	2	2	2		
	Easy analysis options, e.g. of performance problems	2	2	2		
	The SQL server makes its own suggestions for improving the database settings	2	2	2		
	Reporting: easily create reports on document access and then export as PDF or Excel	2	2	2		
	Easy to use with intuitive user interface	2	2	2		

Attachment C1



Streamlining a School District's Hiring Processes

Thanks to DocuWare, Independent School District 196 has streamlined their hiring and other Human Resource functions. Applicant's résumés are indexed and stored electronically allowing principals in any one of the district's 31 campuses to search and review the applications online, ensuring that the right applicant is matched to the right position. This is one example how DocuWare, by improving a process, enables the district to make better use of their resources allowing them to focus on their core mission of education and helping students reach their full potential.

Independent School District 196 is a state and nationally recognized K-12 public school district located in the south suburban Twin Cities, conveniently accessible to both Minneapolis and St. Paul, Minnesota. The 110 square mile school district serves more than 28,000 students enrolled in 31 schools and is one of the area's largest employers, with more than 3,500 full and part-time employees and eight employee bargaining groups.

Work process

With 31 schools, the district's HR department is constantly receiving and processing applications and résumés. When a principal or hiring supervisor needed to fill a position, he or she had to drive to the district office and manually sort through a batch of résumés in order to study find a candidate that met the job requirements. The size of the district and the volume of applications to review required principals to spend significant amounts of time away from their schools in order to research a candidate for a position. Under the paper-based system, the HR department "checked out" the original résumés to the principal while he had them for review. The downfall of this system was that only one principal could review a résumé at a time and résumés sometimes sat on desks unreturned to the district office for weeks.

In addition, the HR department was continually accessing and updating paper-based employee files. Combined, the department spent almost 10-12 hours a week finding and refiling files within the department. The employee files were stored in thirteen locked filing cabinets located in a common area near the department.

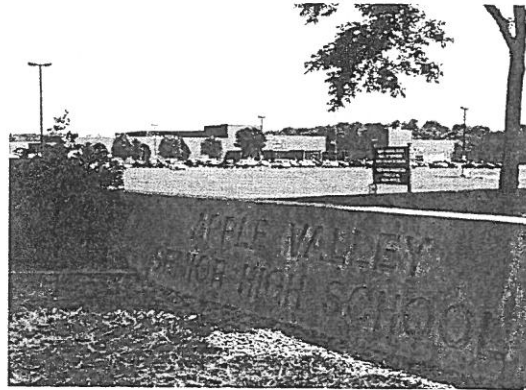
The Task

- Reduce document retrieval and refiling time
- Streamline hiring processes
- Improve the security and maintenance of employee files
- Make employee files easier to maintain

Solution

Solution Requirements

The District began looking for an integrated document management solution. Initially, they were focused on finding a solution that could streamline their hiring practices and allow hiring supervisors to search the applicant pool by qualifications. They needed to improve the security of employee files and make them easier to maintain. Future plans included moving away from microfilm to store student transcripts and other records; putting them in electronically in an easy to access and print format. For this reason, they needed to implement a flexible system that could expand to meet the district's growing record storage needs.



Solution

AMI Imaging Solutions, Inc., an Authorized DocuWare Partner, implemented District 196's DocuWare solution. The HR department worked with AMI to designate the index fields based on the way information was requested.

Document management has streamlined the district's hiring process. Today, applications, résumés and letters of recommendation are scanned and manually indexed by name, licenses and coaching qualifications. Next, they are stored in the "Applicant" DocuWare file cabinet. Those needing to fill a position, can access the "Applicant" file cabinet online and instantly narrow the applicant pool by searching for an individual with specific qualifications.

"It is really easy for a principal to fill a position. They don't have to drive to the district office and spend hours sorting through paper. Many of them access the résumés from home. With DocuWare they can search for a teacher licensed to teach elementary school or quickly review the résumés based on years experience in order to meet budget needs. DocuWare hasn't saved time just on the district administration level, its efficiencies have impacted every school," said Tom Voigt, Information System Coordinator for District 196.

Storing applicant information in DocuWare was such a success that the HR department converted all of their paper employee files for current, terminated and retired employees to electronic files.

The use of DocuWare is expanding throughout the District. Today, student records and transcripts, special education records, Board of Education records, as well as the Payroll and Facilities

Implemented Modules

- Autoindex
- Internet Server

Benefits

Individual Benefits

The benefits of using DocuWare in the HR department have affected the entire organization. On an individual level, principals and other hiring supervisors no longer have to allocate significant amounts of time to drive to the district office and sort through applications. Résumés can be searched and sorted from each campus or home office, giving each principal more time to focus on their school and their students. Additionally, the ability to search and review the applicant pool simplifies the hiring process and reduces employee stress levels.

The Benefits

- Simultaneous access to applications ensures better employee placement
- Efficient HR processes save resources across the district
- Better control of confidential employee records

Department Benefits

On a department level, the move to electronic document management allows the HR department to improve the security of confidential employee information, thanks to DocuWare's security features. Before DocuWare, the HR department spent 10-12 hours a week handling employee files. Today, the HR department spends only 4 hours a week scanning information and accessing the files is almost instantaneous. By maintaining a self-serve database of applicants, the HR staff is operating more efficiently and can focus on their core responsibilities instead of "checking out" résumés. Employment verification requests can be easily answered while on the phone. Once someone is hired, DocuWare makes it easy to transfer documents from the "Applicant" file cabinet to the "Employee" file cabinet. The HR staff is also able to easily comply with governmental and internal regulations regarding numerous forms and procedures that must be a part of every employee record.



"Our employee files are now accessible to everyone simultaneously. This is the best thing DocuWare has done for us. We used to spend 20 minutes or more looking for a file within the department. The file was usually on someone's desk, but if they were in a meeting we would have to wait to retrieve the file. We don't have to refile or wait any more, it's great," said Suzy Klein, secretary to the director of Human Resources.

District Benefits

On the district level, DocuWare allows more than one supervisor to look at the same résumés at a time, ensuring that qualified candidates' résumés are quickly reviewed and the right person is matched to the right position and not overlooked because their résumé was being reviewed by someone else.

Electronic storage allows the district to store employee files indefinitely. By removing HR filing cabinets, the district office gained additional office space and has set up a terminal that employees can use to review their own file.

Independent School District 196 stores a copy of their records in a secure facility. By storing the information electronically instead of using microfilm or paper, storage costs per cubic foot are now 14 times less expensive.

Although hard to quantify, the district has realized savings on recruitment costs and all the other related costs including time and legal exposure from having better tools to put the right person in the right job – the first time.

Implementing DocuWare helps Independent School District 196 meet their goal of educating their students to reach their full potential; by maximizing their resources toward finding and hiring great teachers and staff, thus allowing the administration to focus more time on educating students.

Conclusion

"Our employee files are now accessible to everyone simultaneously. This is the best thing DocuWare has done for us. We used to spend 20 minutes or more looking for a file within the department. The file was usually on someone's desk, but if they were in a meeting we would have to wait to retrieve the file. We don't have to refile or wait any more, it's great."



*Suzy Klein
Secretary to the Director of Human Resources
Independent School District 196*

This document can also be found here:
<http://pub.docuware.com/en/independent-school-district-196>

DocuWare
From Documents to Value

For more information please visit our
website at www.docuware.com

Attachment C1

DocuWare
From Documents to Value



Big Cost Savings for Small Town

The Town of Henrietta implemented DocuWare and saw a Return on Investment in close to a year, based on hard cost savings alone. They eliminated over \$20,000 a year in paper storage fees and dramatically improved document retrieval times and efficiency.

Initial Situation

The Town of Henrietta is located in the heart of Monroe County, just outside of Rochester, New York. Home to 45,000 people, it retains its small town feel as a wonderful place to live, work and play.

As the Town grew in size, the volume of documents it needed to manage also grew. Documents were filling onsite and offsite storage facilities at a costly pace. Town meeting minutes, planning and zoning case files, registration forms, claims and lawsuits – nearly everything needed to be permanently archived. Searching for important documents in filing cabinets and vaults had become a daunting task and offsite document storage and retrieval was also costly. Overall, access to paper-based files was tedious, expensive and took up valuable space.

"Our major issue was space, and that was our leading reason for looking at document management software. Now that we are using DocuWare, we've benefited far above just gaining extra space," said IT Coordinator for the Town of Henrietta, Mario Angotti.

Name of Organization: Town of Henrietta

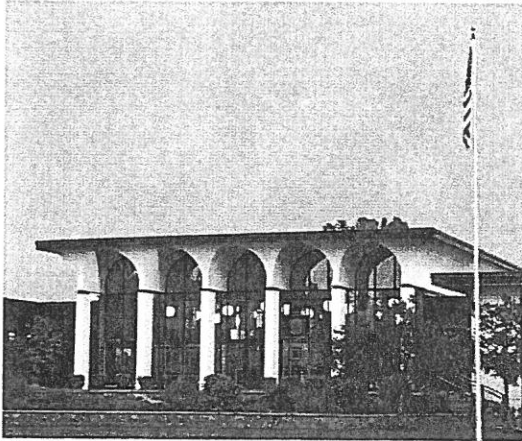
Industry: Municipality

Location: New York, USA

Application: company-wide

Document types: real estate and land records; birth, death and marriage certificates; sporting licenses; dog licenses; recreation registration slips; residential and commercial building and renovation permits, records of board and commission meetings

Requirements



After attending a document management seminar, the IT Coordinator knew that implementing a document management system could solve their paper handling problems and eliminate the storage boxes piled in every spare corner in their office. The Town knew they needed a solution that could be integrated with important software applications they use such as: RPS, the New York State Real Property Tax System, and BAS's Municipal Clerk Licensing System, a software application that automates Town Clerk offices, along with various other databases. Due to the nature of the programs they wanted to integrate with, they needed a solution that could be customized through its own software development kit (SDK).

"We did look at other products; however, DocuWare was the product for us hands down. We loved the flexibility, modules and third party integrations. That DocuWare has its own SDK and thick and thin client applications, finalized our choice," said Angotti.

Solution

An Authorized DocuWare Partner worked with the Town's IT team to implement DocuWare and develop a streamlined system perfectly suited for the Town's specific document management needs. A fleet of Toshiba MFPs - ranging from the Toshiba e-STUDIO 523T, 203, 2330C and the 555 were implemented as dedicated scanners and shared between departments through the use of mobile wireless carts containing a computer and Fujitsu high speed scanners that were wheeled around the office. Documents are automatically indexed using Optical Character Recognition or OCR for short.

Applied Modules

- Autoindex

Today, the Town has over half a million documents stored in DocuWare. The Town Clerk's office was the first place DocuWare was rolled out because this office is the record management office for every document the Town owns such as real estate and land records; birth, death and marriage certificates, sporting licenses, dog licenses, records of board and commission meetings to name a few.

New records are stored electronically and the Town's in-house staff is working to back scan existing paper records, starting with the frequently accessed documents. Once the contents of each box from the storage facility are scanned into the system, the paper records are destroyed, which means one less box costing the Town of Henrietta.

Benefits

Before implementing DocuWare, finding certain documents could take days or weeks, depending on the amount of research involved. With DocuWare in place, retrieval is easy and happens in seconds.

The Town's Return on Investment was realized in only 15 months, based solely on the reduction in storage related and preparation fees, not including gains from increased productivity. In fact, the Town will save more than \$20,000 a year by reducing paper document storage. Town of Henrietta Supervisor Michael Yudelson stated "We need things that increase our efficiency and save us money. There aren't a lot of things that do both, but DocuWare does."

Every five years, the Town of Henrietta conducts a comprehensive land use survey. As part of the process, the Town sends out a 6-page questionnaire to more than 15,000 households. In previous years, the results of the returned questionnaires had to be typed into a database. After implementing DocuWare and third party software ABBYY FlexiCapture, the Town of Henrietta was able to export all of the responses into their database electronically.

FlexiCapture was able to use OCR (Optical Character Recognition) to read the completed questionnaire's check boxes and export the data to Microsoft Excel. The software also pulled the addresses to determine which quadrant each address was in, allowing for trend figures to be easily calculated within the Excel file. FlexiCapture then exported all of the information into DocuWare for simple retrieval and review as needed.

The Town Recreation Department was also paper intensive. They frequently accessed program registration slips for tax purposes and to see what classes the child had previously enrolled in. Registration slips are stored for seven years or until the child is 22 years old. By scanning the documents, the department eliminated numerous filing cabinets and many trips to the document vault to look for information.

The Building Department has also begun using DocuWare. By storing and back scanning completed residential and commercial building and renovation permits, Town employees can quickly retrieve vital information on various projects for residents and contractors. A document request that would have taken anywhere from a full day to weeks to research, now takes only seconds.

Tasks

- Reduce paper-handling costs
- Speed up document retrieval time
- Integrate custom applications with EDM
- Improve efficiency

Benefits

- Over \$20,000 a year reduction in paper storage fees
- Increased efficiency
- Quick response time for town residents requesting information
- Automatic processing of land use survey results

Conclusion

The bottom line is the Town has realized huge benefits in increased efficiencies and cost savings. These savings will continue to be realized moving forward and with the addition of other Town departments. As the Town of Henrietta Supervisor Michael Yudelson stated, "It was a no-brainer. We are saving money because we've improved our efficiency and eliminated offsite storage costs."

"We need things that increase our efficiency and save us money. There aren't a lot of things that do both, but DocuWare does."



Michael Yudelson, Town of Henrietta Supervisor

This document can also be found here: <http://pub.docuware.com/en/town-of-henrietta>

DocuWare
From Documents to Value

For more information please visit our website at www.docuware.com

SmartSearch Professional Edition Core features

Annotations – Work with your electronic documents as you would with paper files. Easily attach a sticky note, highlight, redact, sign or stamp documents while always protecting the integrity of the original record. Visual properties including color and font style are completely customizable.

Audit Trail – Quickly view the history of a record including views, prints, emails, launches and exports to name a few. Document History can be run against a single record, the results of a query or at the Archive level.

Capture Workflow – A feature that allows the building of sequential capture workflows using various designed activities for specific functions. Documents dropped or scanned into that folder will kick off the workflow based on the activities set in the sequential workflow delivering the results to either a SmartSearch Inbox as a preprocess routine or directly to a designated Archive. The activities that come with the core product are as follows;

Bar Code & Blank Page Separation – SmartSearch supports popular bar codes 39, 128, Code bar and eight others for document separation. Using a Windows service, the bar code engine monitors a directory and performs the pre-configured separation operation.

Bar Code Recognition – SmartSearch supports bar code recognition, the process of optically reading a bar code and assigning extracted values to a pre-configured SmartSearch index field.

Delete Pages – Deletes blank pages to free up storage space and eliminate pages used when using blank page or bar coded separators so these will not appear as the first page when documents are open in the document viewer.

Image (Clean-up) Enhancement – Using state-of-the-art image enhancement technology, SmartSearch quickly and easily applies despeckle, deskew and various other document clean-up tasks to improve OCR capabilities.

Import by File Name – Allows stored images in network folders to be imported into SmartSearch using the Microsoft file naming convention as an index value. If the Microsoft name has a delimiter character in the name, i.e. Customer Name_DocType_Date, each of the delimited values can parse as an index value in SmartSearch.

Import Data and Docs – Allows automated import of both images and associated .CSV files containing metadata as index values into SmartSearch. Example: if scanning is taking place offsite and the scanning vendor FTPs the images and the metadata to a folder each month. Utilizing this activity in a SmartSearch Capture Workflow would allow automated import of these images with metadata to a specific Archive.

Import Emails – Monitor any POP or IMAP email account and automatically import all email messages and/or attachments sent to that account and index by To, From, Subject, CC, Attachments, Priority and Date.

Import Files – The Capture Workflow activity that monitors the network folder for incoming images and initiates the built sequential workflow.

Import Scans – Similar to Import Files except is used to monitor network folders for scanned images when the optional SmartCapture scan utility is being used.

Import WebForms – Allows Administrators to import GlobalForms forms into SmartSearch by using the WebForms configuration. The forms data will be written to a PDF version of the form and imported into SmartSearch with index data based on the settings of the template.

Page Count Separation – If there is a consistency in the page count separation of documents being scanned this activity can be utilized to eliminate the need for blank cover sheets or barcode coversheets. Often used when the customer is willing to presorting of documents prior to scanning.

Release to Archive – This activity releases the image and the extracted data from either barcode recognition or Zonal OCR (optional activity) to the designated Archive. It typically completes any predefined Capture Workflow.

Release to File – This activity introduces the opportunity to share captured documents with third party systems or to distribute records to external sources.

Release to Inbox – This activity is often used when preprocessing documents prior to release to their permanent SmartSearch Archive is needed. Example: The mailroom scans all documents using blank page separation to an administrative person's Inbox. Who as part of their work routine opens them up and indexes them to the appropriate Archives.

Set Fields – Hardcode a static value that all documents being processed through the capture workflow will inherit.

Data XChange – A feature that allows users to manually initiate database lookups to share data from either within your SmartSearch database tables or external business system databases. Based on a key field, other data can be populated into your SmartSearch index fields to index documents. Configuration is done through an easy to use design tool for connecting to an ODBC/OLE DB compliant data source or via DSN and then mapping fields. For automated database lookups.

Document Merging and Appending – Users can select multiple documents in a SmartSearch Inbox by adding a check to the box provided in the document results screen. Selecting the Merge Documents feature from the ribbon style tool bar will prompt the user to indicate into what SmartSearch Inbox the newly merged document should be placed. Additionally, users can append a document or page to all selected documents.

Document Versioning – As a new simplified option to our standard check-in/ check-out method for Revision Control, Document Versioning simply creates a new copy of the file whenever an edit is executed. As a result, users can now easily track changes to an annotation, index value or the document itself while being able to refer back to previous versions at any time.

Drag & Drop Bursting Option – Users can drag and drop specific thumbnail pages from a multipage document residing in a SmartSearch Inbox when viewing it in the SmartSearch viewer. The user will be prompted with an option to either delete the pages from the original record or maintain them as part of the original image.

Drag & Drop/Import of Email with Auto Indexing – Outlook Email message (*.msg, *.eml) files, either imported or drag-and-dropped into SmartSearch will automatically populate specifically named Archive Fields with the respective information from the email including To, From and Subject. Emails will also bring with them any attachments in their native format.

Dynamic Pick Lists – Allows users to filter drop down fields in a pick list based on information selected in a related field. For example: A user selects Ford for the Manufacturer in one pick list and a variety of Ford models appear in a second pick list. If the users selects Honda in the first list than a completely different list of models appears.

Email Delivery – Easily send one or more documents from SmartSearch through direct integration with Microsoft Outlook. SmartSearch converts your records to the industry standard PDF format without need for Adobe licensing requirements.

Email Notification – An automated email notification can be set on any SmartSearch Archive and is triggered when a document is added.

File XChange – Direct Integration with file system allowing SmartSearch to appear as a drive letter. Users would be able to Save To an archive without opening SmartSearch. With this action the user would be presented with the index data for the selected Archive allowing for direct indexing to the repository.

GlobalSearch – Extend the reach of your ECM platform with web based document delivery. Remote users can search, review, edit or annotate records and even add the power of web based workflow capabilities when used in conjunction with our Work XChange module.

KeyFree Indexing – KeyFree offers OCR assisted data entry automation. KeyFree gives users the ability to capture, extract and index information from document images and quickly populate SmartSearch with the selected data.

Revision Control – Setup on a per archive basis, SmartSearch will automatically preserve all previous versions of a document and require users to check a document out to make changes. Changes can be made locally in their native application or made in line in the SmartSearch viewer. Publishing settings allow collaborators to control the document version displayed to users as they perform searches. Security policy settings allow the administrator to set who can check out/in documents and see previous versions.

SmartCapture – Provides a simple interface for unlimited TWAIN based scanning that integrates directly with the Capture Workflow engine of SmartSearch. Additional enhanced scanning capabilities include KeyFree Indexing, drag and drop page reordering and all standard viewer window controls.

SmartSearch Professional Edition Optional modules

Application Server – Additional Application Server licenses can be added to your installation to improve support in distributed network environments. Servers share a common license pool to support load balancing, distributed capture processing and Guest/Read Only/Snapshot instances. Also supported are local application servers and file storage to minimize traffic in large WAN networks.

Capture Workflow Load Balancing – The Capture Workflow Load Balancing utility helps manage and prioritize functions across the network.

Content Search – SmartSearch supports keyword, fuzzy, stemming, phrase and wild card searching within the contents of an electronic document and highlighting matching instances.

DataMerge – DataMerge is SQL code written on your SmartSearch database tables to automate data population from line of business systems based on a key field. Think of it as an automated Data XChange.

GlobalCapture EIP, OSA & eBRIDGE – The user-friendly interface of GlobalCapture provides users with the tools to automate image capture and distribution directly from the touch panel of their office MFP. Advance the scanning capabilities of your MFP by incorporating image enhancement, batch separation and bar code recognition capabilities. GlobalCapture is available for Xerox EIP, Sharp OSA and Toshiba eBRIDGE enabled devices.

GlobalForms – GlobalForms is a forms design studio that allows users to build rich, dynamic web based forms that submit directly into SmartSearch.

Image XChange – Leveraging GDI hooking technology, SmartSearch can be integrated with any Windows, Web, Java, 5250 or 3270 Terminal Emulator, DOS or UNIX VT100 line of business system. Users simply CTRL+Right Click on any piece of data on the screen and SmartSearch displays all documents that match. No charge per application or per screen!

Multi-Database Support – SmartSearch allows for multiple application servers to share a common license pool. The Multi-Database Support allows networks to minimize traffic to one server, enhance how documents are being processed and increased security.

OCR (Additional Cores) – This option allows PDF Creator (Full Page OCR) engines to utilize multiple processor cores and speed up performance. Available for up to four cores.

PDF Creator – This option is a full page OCR engine and provides the ability to turn scanned images into text searchable PDF documents that allows the Content Search feature to find keywords and phrases. PDF Creator can also turn your scanned image into a Microsoft Word or Excel file for easy editing.

PlanetPress – PlanetPress is a variable data printing utility that can receive unformatted data from a mainframe print stream, CSV or database lookup and format it for output to print, email, fax or archive into SmartSearch, eliminating the need for pre-printed forms and automating distribution.

QuickBooks Connections – Square 9's QuickBooks Connections is a highly advanced, cost-effective solution designed to streamline and facilitate your accounting processes. QuickBooks Connections provides seamless integration allowing users to create bills, route invoices and distribute documents from SmartSearch in tandem with their QuickBooks® accounting software.

SmartSearch DR License – A second like for like copy of SmartSearch to be used in disaster recovery scenarios.

SmartSearch Test License – A second like for like copy of SmartSearch to be used as a test environment for upgrades, integration or training.

Tabular Data Control – Supports multi column, multi row (spreadsheet) indexing as a separate field control located at the bottom of the document viewer. Traditional SmartSearch index fields can be added into the table fields to create the table data control. This is most often used to store line item invoice or sales order information for GL coding, but can be used anywhere that multiple columns and rows of data need to be correlated and stored.

Work XChange – Is the workflow module for SmartSearch that provides the ability to build business rules into your SmartSearch database to route documents, send notifications and automate actions. Workflow can automatically initiate actions based on any index field data such as document status or document date, or based on user defined actions such as an approval. Email notifications can also be sent to notify users that work needs attention and can include the document(s) attached and/or a link that will open up the document or result set in a web client. Once a process is complete, document data can be automatically exported to CSV to be imported by line of business systems.

XML Transform – SmartSearch has the native ability to process and import documents from an XML data file. XML Transform has the ability to format virtually any XML data into a format that may be imported both easily and automatically into SmartSearch.

Zonal OCR – This feature supports OCR data extraction on structured documents with pre-defined templates.

SmartSearch Corporate Edition Core features

All Professional Edition Core features plus:

Content Search – SmartSearch supports keyword, fuzzy, stemming, phrase and wild card searching within the contents of an electronic document and highlighting matching instances.

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GlobalForms – GlobalForms is a forms design studio that allows users to build rich, dynamic web based forms that submit directly into SmartSearch.

Hire to Retire – The single solution features an advanced format to streamline the course of employee hiring, while simplifying your HR department's document heavy processes. Hire to Retire improves document creation, storage and retrieval, and retention policies, saving valuable time of your HR team. The convenience of Hire to Retire creates an operative workflow to streamline Human Resource specific processes.

Image XChange – Leveraging GDI hooking technology, SmartSearch can be integrated with any Windows, Web, Java, 5250 or 3270 Terminal Emulator, DOS or UNIX VT100 line of business system. Users simply CTRL+Right Click on any piece of data on the screen and SmartSearch displays all documents that match.

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PlanetPress – PlanetPress is a variable data printing utility that can receive unformatted data from a mainframe print stream, CSV or database lookup and format it for output to print, email, fax or archive into SmartSearch, eliminating the need for pre-printed forms and automating distribution.

Purchase to Pay – Square 9's Purchase to Pay features advanced Enterprise Content Management tools which create an end to end solution for Accounts Payable automation. Purchase to Pay is designed to dramatically reduce the high transactional costs inherent to processing Requisitions, Purchase Orders and Vendor Invoices in a paper based world.

QuickBooks Connections – Square 9's QuickBooks Connections is a highly advanced, cost-effective solution designed to streamline and facilitate your accounting processes. QuickBooks Connections provides seamless integration allowing users to create bills, route invoices and distribute documents from SmartSearch in tandem with their QuickBooks® accounting software.

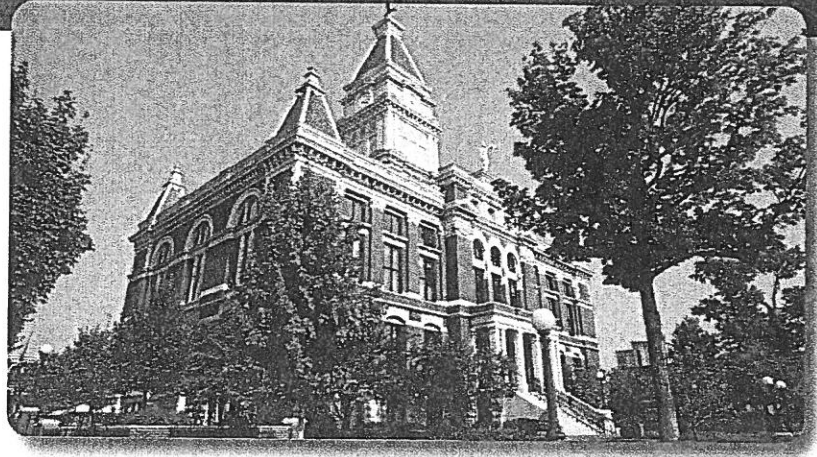
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Business:
Government

Company:
Town of Centerville

Objectives:
Manage police, court and other government documents more efficiently



Town Votes for SmartSearch

Town officials choose SmartSearch to manage police reports, court records and other government documents more economically and efficiently

Who says government can't be efficient? The Town of Centerville had run out of storage space for its police reports and court records, and it wanted to be able to find and retrieve these documents more quickly and easily. When they learned how little it would cost to implement SmartSearch and how much money and time it would save, the town's mayor and aldermen acted decisively. "They decided we just couldn't afford not to use SmartSearch!" said Susan Griggs, the town clerk.

The Town of Centerville lies in the heart of Tennessee in an exceptionally picturesque region rich in history and filled with bubbling springs, scenic waterfalls and gently rolling hills. The centrally located town was designated the county seat of Hickman County in 1823 and is situated only 60 miles southwest of Nashville, a city synonymous with country music and one of the nation's most vibrant cultural centers. The Town of Centerville provides a variety of essential municipal services for its residents, and includes police, maintenance and sanitation departments.

Historically, governments have always run on paper, and until recently the Town of Centerville was no exception. The burden of managing much of the government's documentation requirements had fallen on Griggs, who manages critical records for the town's busy police department and court. "The police department is the largest department in the town," Griggs explained. "Their job is to protect our citizens and there's a lot of paperwork involved in what they do."

After long years of storing thousands of paper documents, the Town of Centerville had come to a critical moment: either invest more of the taxpayers' hard-earned money in costly and space-consuming filing cabinets—plus find suitable offsite storage facilities; or else modernize with a new electronic content management system.

"There was no room left and we had to do something," Griggs recalled. "We were looking for an affordable, easy-to-use solution that would eliminate our reliance on paper and make it easier to store and retrieve important records." Griggs had been attempting to find a workable solution for a couple of years when she finally contacted a trusted office technology company. After carefully evaluating the town's requirements, they introduced her to SmartSearch.

Griggs processes reports using Microsoft Access. "SmartSearch looked similar to the software I was using already," she observed, "and I could see that it would be extremely easy to learn and use. When we compared the investment for Smart Search to the lease-to-own estimate for more filing cabinets and supplies, SmartSearch came out the winner by a country mile."

Town of Centerville police officers prepare arrest reports, citations and a variety of other hand-written reports daily. These go through the department's chain-of-command and then are sent to the town clerk's office for processing. When they reach her desk, Griggs manually enters the reports into Access and prints one-page paper copies of them in a format



known as a TIBRS (Tennessee Incident Based Reporting System) Report. Griggs also processes correspondence, time sheets, purchase orders and invoices. When court is in session, she runs the docket.

Before the town installed SmartSearch, Griggs would then have to file the TIBRS Reports and other documents in designated filing cabinets by hand. Now she follows the same procedure, but instead of manually filing the documents, she uses a simple scanning device to scan the printed reports directly into one of several customized SmartSearch Inboxes (e.g.: "Offense Reports"). Griggs does this weekly, or whenever it's convenient. The original paper documents, which had been the source of so much frustration, are tossed into a box for shredding.

SmartSearch makes storing and retrieving these documents easy, too. When Griggs is ready to index and store documents, SmartSearch prompts her with a number of preset criteria (e.g.: "misdemeanor" or "felony") and she presses a button to choose the appropriate ones. "It's as simple as that," she said. "It really is!" Before transitioning to SmartSearch, Griggs might have had to sift manually through hundreds of documents to find a misfiled report. Now, she just searches on key words and SmartSearch retrieves the relevant documents—instantly.

"I estimate that SmartSearch has saved me 15 hours each week that I can now devote to other town business," Griggs said. "That equates to a more than 35-percent gain in my personal productivity, and it gives me a sense of personal

satisfaction because I'm getting my job done better and more efficiently." Griggs reports that SmartSearch has been so successful in her office that the police, human resources, accounting and other town departments are actively exploring ways to use SmartSearch to streamline their business processes as well, and to provide better coordination among departments and with the state and federal government.

"I am just really pleased to have found SmartSearch," Griggs said. "It really is tremendous. I would recommend SmartSearch to any organization or person who wants to save time and avoid frustration managing documents. SmartSearch has worked for us. It has done everything we were hoping it would do—and then some!"

About Square 9 Softworks

Square 9 Softworks is a leading developer of innovative, business-centric software solutions including the award-winning SmartSearch Content Management Suite. Dedicated to making content management available to organizations of all sizes, Square 9 Softworks designs solutions built on open architecture and cutting-edge technologies that drive efficiency and productivity across all business applications.

Through decades of experience with content management technologies in business enterprises of all kinds, Square 9 Softworks has acquired a thorough understanding of

document-driven business processes. Intensely customer-focused and highly responsive, the company delivers effective, value-driven solutions and has achieved a reputation for excellence in meeting the rapidly evolving needs of its customers.

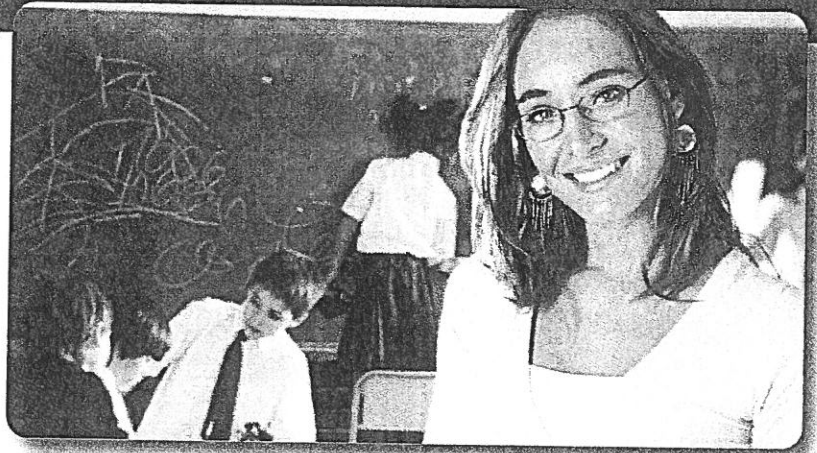
Square 9 Softworks distributes its solutions exclusively through a network of highly skilled channel partners from its corporate office in New Haven, Connecticut. For further information, visit www.square-9.com



Business:
School District

Company:
Twinsburg City Schools

Objectives:
Comply with retention mandates;
solve document storage problems



Twinsburg City Schools Graduates to SmartSearch

SmartSearch helps school district comply with state record retention mandates, while boosting efficiency and solving paper storage problems

When the State of Ohio reorganized and systemized school districts' record retention and disposal processes, Twinsburg City Schools turned to electronic content management.

Their first solution was cumbersome, however, and the district eventually transitioned to SmartSearch. Affordable, easy to learn and use and extremely reliable, SmartSearch gives administrators the assurance that their district is in compliance with the state's directives and affords the district far greater efficiency and flexibility in storing and retrieving important records.

Twinsburg City Schools is a large suburban Ohio school district comprised of five schools, from primary school through high school, with a central administrative building. The district is the third largest employer in Twinsburg with more than 500 employees and supports over 4,300 students. Twinsburg is a very progressive community and strongly supports education. As a result, the State of Ohio has consistently classified the district as "Excellent," and in 2007-08 classified it as "Excellent with Distinction."

The State of Ohio requires Twinsburg City Schools to retain numerous documents—from school board and administrative records to a wide variety of student records—many of which must be retained permanently. Prior to adopting electronic content management, designated original records were allowed to accumulate in various district buildings throughout the school year. At the end of the school year, they were cataloged, boxed up and put into storage wherever there was room in the district's facilities. When public record requests

were made, a staff person would physically search through boxes to find the file—and hope it was in good shape.

The district's acute document storage predicament would occasionally manifest itself in dire and rather unfortunate ways. In one memorable instance, some of Twinsburg City Schools' student records had been stored in cardboard boxes in the district's transportation and maintenance garage. When shelving in the non-climate controlled building collapsed, the records sustained severe damage from water and rodents. Predictably, a parent needed access to the nearly destroyed records and conscientious administrators were distressed and embarrassed by the incident.

Eventually, in response to the state's retention mandates and occasional incidents like this one, district administrators prudently decided to implement an electronic content management system, initially by electronically archiving only the most frequently requested categories of documents. Although the district's first solution allowed the process to move forward, it was extremely inefficient. Office support staff had to manually create virtual folders for each student and needed to use a second software application to perform the actual scanning before electronically storing records.



When this underperforming solution was no longer supported by office systems dealers, it became imperative for the district to select a new and better solution. After carefully evaluating Twinsburg City Schools' requirements, the district's trusted office technology company installed SmartSearch. The result was a dramatic and welcome increase in efficiency, flexibility and reliability.

Selected student documents are now archived on an ongoing basis instead of annually. Those forming part of a new student's file are available to administrators immediately and can be updated throughout the year. This capability is especially helpful for legal documents pertaining to custody matters or court placement, and for withdrawing students' records which are often requested by the students' new school districts. The use of SmartSearch is now expanding throughout the organization to support payroll and other critical business functions as well.

"The old system had become a huge problem for the district," said Bonny Cairns, technology business coordinator for Twinsburg City Schools. "End of the school year duties for the support staff have increased exponentially. My job is to find ways to help them absorb these new tasks efficiently, and SmartSearch has helped me to do that."

Replacing the first solution with SmartSearch was an immediate hit with the district's employees. "Our hard working support staff was just thrilled because SmartSearch eliminated all of the prep work associated with the first solution we had used," Cairns said. "They found SmartSearch

very easy to learn and use. It has made a very tedious and time consuming job a real snap."

"With SmartSearch," Cairns explained, "the office support staff walk up to their multi-function printers and scan documents directly into a SmartSearch Inbox. When they get back to their workstations, they can index the documents whenever time permits. I think that the flexibility SmartSearch gives us to index documents in this way is one of its biggest advantages."

A recent legal opinion from the school district's lawyer confirmed that electronic documents fulfill the state's retention mandate for documents that must be stored permanently, allowing the district to shred its originals. "This has really helped to solve our storage problem," Cairns said, "and our administrators appreciate the assurance that we are in full compliance with the state's retention directives."

"I would recommend SmartSearch wholeheartedly," Cairns said. "Because SmartSearch has been so effective for the district and because it is so easy to use, our payroll and other departments have begun to use SmartSearch, and as our use of SmartSearch expands we will enjoy even greater efficiency with this marvelous solution."

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