Superior Technology

At DocuWare, we take pride in offering industry-leading ECM technology. Particularly when it comes to essential aspects like Innovation, Architecture, Security, Integration and Scalability. You might think that this is all marketing-speak, but please take a little time and read through our Technology Leadership White Paper and decide for yourself.

As a user of Fortis, Fortis SE or FortisBlue we want you to fully understand the capabilities of the DocuWare software that will be available to you in 2016. This White Paper will inform you about DocuWare's core features, innovative add-on modules and leading-edge technology infrastructure. You’ll also find a link to an online trial version of DocuWare. The last section of the White Paper, Accomplish More with DocuWare describes commonalities and key differences in the way that DocuWare and Fortis work. This White Paper will also be updated through a series of articles which you can subscribe to on our blog.

Migrating to DocuWare

Since DocuWare acquired Westbrook in 2013, our strategy has been to leverage the very best technology from the Westbrook and DocuWare products to create a new, even more compelling, software offering. We took an in-depth look at the Fortis and DocuWare technology architectures before we decided to move the Fortis product lines to the DocuWare platform. We've taken on a two-plus year development project to create an outstanding combined product and a migration path from Fortis to DocuWare.

To be fair, there will be effort when migrating your data to the new software architecture. How big this effort will be depends on the usage, scope and size of your Fortis solution. Beyond 2016, we will continue to support Fortis and FortisBlue for some time, so that you can plan and synchronize the migration to DocuWare with your own operational...
requirements. Currently the last releases of Fortis and FortisBlue are scheduled for September, 2017. We plan to support Fortis and FortisBlue through the end of 2017.

Our Professional Services team can move documents and index data to a DocuWare solution today. This is useful for testing DocuWare with real documents and data and for those users who want to move away from Fortis short term. However, it still has limitations, for more information contact your Authorized DocuWare Partner or DocuWare Professional Services. You can contact Professional Services at: professional.services.americas@docuware.com.

Each release of Fortis and FortisBlue will be issued with migration tools that correspond with the new features being introduced into the DocuWare platform in that release. In order to align DocuWare, Fortis and FortisBlue for easier migration, Fortis and FortisBlue will be released with the same version number as the corresponding DocuWare release so that all DocuWare products will be in synch. Fortis will move from Version 2.8 to Version 6.8. FortisBlue will move from version 2.4 to Version 6.8.

When you're interested in migration and want to estimate the effort and what external help you need, consult your DocuWare Partner or reach out directly to DocuWare Professional Services and /or follow the guidelines that we will develop and provide to you in ongoing blog articles.

**Advantages of DocuWare Today**

After migrating your Fortis solution to the DocuWare architecture, you will benefit from its advantages without giving up any of the functionality you depend on today. Even more significantly: you will get many new core features without any additional cost for software licenses.

**Base Technology**

*Browser Client*

The complete DocuWare Client functionality is implemented as an HTML5 application which runs in every modern browser on every operating system. No software installation or update is required on client computers.
Applications which require communication with a Windows Client are implemented as Windows Apps, accessible through DocuWare Desktop. It is provided as an icon in your system tray. DocuWare Desktop allows you to scan and import documents and to edit configurations for DocuWare and its options. You can access Desktop apps and manually check for updates, but you are also alerted when there are new versions available. Users can run the updates themselves (provided they have permission) or an administrator can manage the updates. It's as easy as downloading an app on your phone. You go to one place on the DocuWare interface to get the apps you need.
Windows Explorer Client

This is one of the Desktop Apps which directly integrates with Windows Explorer. Store, search and edit documents in the familiar Explorer environment. The Windows Explorer Client provides you with a folder structure defined by index information in DocuWare. For example, the top level folder could be vendor and the next level could be document type (invoices, purchase orders, etc.). So if you drop a document on the invoices folder it will be classified as document type invoices and by vendor. You can get documents imported and indexed without using the DocuWare Interface – simply by dropping your files in this folder. All documents stored and retrieved with Windows Explorer Client are also accessible through the Browser clients and Mobile Apps.
DocuWare offers mobile support for all major tablets and smartphones (Android, iOS, Windows Phone). Using DocuWare Mobile, you can access documents stored in your file cabinet through the familiar search dialogs and task lists. Documents can also be moved through their workflows on mobile devices.

PaperScan, one of our most recent innovations, uses a smartphone camera to scan documents. The app photographs documents, de-skews the images, and saves the scans into your DocuWare basket, Dropbox or Google Drive. It is both incredibly easy to use and – thanks to patent-pending technology – provides excellent scan results that can be incorporated into ECM just like traditionally scanned documents, without any limitations. PaperScan is available for Android and iOS.
More State-of-the-Art Functionality

DocuWare software can be supplemented with flexible add-on modules that extend its functionality to meet your business needs. The following highlights are described here: Intelligent Indexing for automated indexing; Smart Connect for easily configurable integration with other applications; Task Manager which enables you to use Task Lists and Email Notifications to manage simple workflow; and a drag-and-drop Workflow Designer.

Intelligent Indexing

Intelligent Indexing is our patent-pending technology for automatic indexing during document capture. It continuously learns from a user’s entries to identify the most relevant index entries, recommending increasingly accurate choices with each new document added. This makes archiving virtually automatic. Users who have opted to use our Intelligent Indexing Service as a cloud service benefit further thanks to crowd sourced learning, which taps into the previous indexing patterns of others. Today, over a quarter million documents are already being captured with this method.

Smart Connect

This module integrates your documents with most applications on a Windows PC. You can configure it yourself with an easy-to-use wizard. Smart Connect reads text directly from a third-party application user interface and then uses it as search or index terms in DocuWare. Documents relating to a data record opened in the third-party application are then easy to call up in DocuWare – using a button displayed in the third-party application. It is just as easy to import text as index terms for documents that you want to archive in DocuWare.

By using more than one configuration you can also display several Smart Connect buttons in the same third-party application. For example, one button could be used to display the invoice and another to display the delivery note relating to the same accounting record. You can customize the Smart Connect button label for the configuration.
Task Manager

You can use Task Lists and Email Notifications to manage simple workflow and accomplish daily tasks. For example, if you have invoices that need to be approved by a manager and then by the CFO this could be handled by Task Manager. Task Manager uses stamps to move documents through their workflows. It’s as easy as reviewing the document and placing your stamp on the page to automatically route the document to the next person once it’s saved. The stamp gives visual confirmation that you approved the document.

Workflow Designer

DocuWare Workflow includes a drag-and-drop workflow designer that documents your workflow in a flowchart as you create it. A helpful testing feature that runs through the workflow and points out where you’ve made errors is also included in the workflow designer. You can test complex workflows within the designer to make sure they work properly before the workflow goes live.
**Cutting-Edge Infrastructure**

**Integration**

A Document Management system needs to fit into an existing IT landscape since its potential is really only unlocked when it integrates with other systems. For seamless work, for example, documents should be directly stored in a Document Management system straight from an accounting program and directly accessible from there as well. The incredible variety of integration possibilities gives DocuWare users an extra edge to make the most of existing resources and configure integrations that best suit their needs.

Multi-function devices (MFD) from many manufacturers can be connected to DocuWare via ‘Connect To’ add-on modules. Documents can be directly archived during the scan process or, in some cases, retrieved from a DocuWare file cabinet directly from the MFD control panel. There are also modules that enables seamless integration of PlanetPress, Artsyl and other advanced capture solutions.

**Import Documents by Printing**

With the universal DocuWare Print Driver it’s possible to directly file documents out of virtually every application via the print command. You can easily create configurations that identify documents, and then file them appropriately. For example, you can create a configuration for invoices that identifies them based on a few key pieces of text and then stores them to the Accounting File Cabinet using the Invoices Store Dialog. Index information is mapped from zones on the document to index fields in DocuWare. DocuWare printer can even email a document that is sent to the printer, split the document that is being stored, or send it to the physical printer.

**Email Integration**

Connect to Outlook quickly stores your email directly into DocuWare from MS Outlook. You can also easily search and access stored email to be certain you have the latest correspondence whenever you need it.

Connect to Outlook integrates seamlessly into your Outlook setup with its own DocuWare menu and context menu. To store an email: select it and click on **Store** in the menu bar or context menu. You can decide to store the email with its attachments, or only the attachments. If you store both, you can determine in which order they will open in DocuWare.

The email is stored at the touch of a button, regardless of whether it is incoming or outgoing. If you’d like, a store dialog can open, showing you what index terms will be used to store the email. A message appears to confirm the successful storing. You can also save emails in a DocuWare basket, in order to collect them there, and then store them all together in the file cabinet. Or you can staple emails to a DocuWare document. The Intelligent Indexing Service can also index email automatically in a basket.

Connect to Mail is for all other email services which are IMAP-based. With this you can also store email from Google Mail or with your smartphone directly into a DocuWare file cabinet.
Data Integration

Through automatic data synchronization on a database level, it’s possible to incorporate information from other systems for documents in DocuWare or – in reverse – move data from DocuWare to other applications.

Integration using the SDK

A comprehensive Software Developer Kit (SDK) is also available for more extensive integrations. With URL integration, individual elements of DocuWare - such as result lists, electronic baskets or direct document display - can be easily integrated by calling up a URL from any program.

Through its REST (Representational State Transfer) platform, DocuWare offers another key programming interface that can be accessed from all modern developer environments, making it very simple to integrate with programs running on server/client operating systems as well as various devices.

A task list can therefore be directly incorporated into an accounting program. Smartphones and multi-function printers/copiers can receive documents from DocuWare or transfer them to the solution – regardless if DocuWare is running in-house or used in the cloud.

Web Client-Built on HTML 5/Future Proof

DocuWare is 100% browser-based. It is HTML 5 based document management, reducing the IT support and infrastructure required for maintenance. Anyone who wants to work with DocuWare needs nothing more than an Internet-capable device running a standard browser. That means that document management can be used on any platform – whether it’s Mac or Windows – and ensures that the software keeps pace with the rapid changes in IT devices.

All of this is made possible through DocuWare’s modern and standards-based architecture. Its Web Client is developed around HTML5 technology and thereby supports all standard browsers. In rare cases, local applications are still needed, which are offered collectively as DocuWare Desktop Apps and can be administered centrally.

DocuWare works with open communication standards and utilizes HTTP/HTTPS between many components, mostly in conjunction with REST (Representational State Transfer). The use of this future-proof interface architecture for the communication between Windows programs, HTML5 clients and native mobile apps is still completely unique in the ECM sector.

DocuWare’s mobile applications are both available for iOS and Android, thus running on all major platforms. For a DocuWare installation, the newest Windows versions are supported; in addition, all leading database server technologies such as MS SQL, MySQL and Oracle are supported across a multitude of versions.

Cloud Offering

Unique to DocuWare – its cloud function is full-featured with the same functionality as in our on-premise software. In two of the three subscription plans available, the price is based on amount of storage used with an unlimited number of users permitted. DocuWare is the first and – continues to be the only established ECM provider to offer true “Software as a Service” on the cloud. Fifteen years ago, the company began moving in this direction, setting the stage for today’s DocuWare software that is multi-tenant, service-oriented and scalable. Thanks to the early migration to browser-based technology, DocuWare has comprehensive experience in the cloud arena, which 4,000 users are currently benefiting from. The collective use of a highly scalable cloud system typical of SaaS offers tremendous cost advantages that DocuWare is able to pass along to its users. Since the same technology is used for both cloud and in-house systems, there is no need to develop on separate tracks and every expansion or improvement benefits both cloud and in-house systems equally.

Test Drive DocuWare

If you want to easily learn more about DocuWare view our series of online videos. Just visit our Web Site and select the first entry in category “Solutions” (https://www.docuware.com/document-management-software-solutions/document-lifecycle-management-docuware). You will find a series of short videos followed by brief, easy-to-understand tutorials. Just take a little time, relax in front of your computer and watch the videos.

You can also try DocuWare for yourself. After you’ve finished reading this White Paper please use the script (Appendix A) to access a customized DocuWare Cloud demo where you can get hands-on experience with many of the DocuWare features you’ve read about here.

For more information please visit our website at www.docuware.com
Accomplish More with DocuWare

DocuWare and Fortis are very similar because they have the same end goal: to digitize your documents and automate business processes. That being said, there are differences in their architectures that we would like you to understand.

Document Storage

As you know, in each Fortis Database, Document Types are defined. These Document Types determine what Index Fields are available for a document, and are also used to group documents in search results.

In DocuWare, we use a more flexible structure defined in File Cabinets. Each file cabinet defines a set of index fields for any document stored within. Then we create several dialogs for Store, Search, and Results lists which offer different subsets of a file cabinet's index fields.

This method results in a more flexible way to store our documents. All we have to do in DocuWare is create one index field called “document type” and set the values available in that field using a select list. Next we set up Store, Search and Results dialogs as needed for the document types contained in the select list. Then we can use the Document Type field to find documents of only a specific type. There are more benefits to this method of indexing, for example, now you can search all document types stored, simply by leaving the Document Type field blank when you perform a search. In fact, now the document type no longer has to be the primary defining criteria. Vendor, Customer, Date, or any other field that you have stored index information on can be used to classify your documents.

In the coming releases of DocuWare we will add new features that provide alternative ways to group your search results to replicate and improve on some of the functionality you are used to seeing in Fortis. We are planning on introducing new ways to sort documents in results that will provide grouped viewing of documents based on index information. For example, you could choose to break out by Document Type and get an individual group in your search results for each doc-type returned by the search. As mentioned before, the great thing is that this grouping can be done on any field, so we aren’t restricted to just groups of Document Types, as we currently are with Fortis.

Import

Bringing documents into a Document Management system is a basic need. Both Fortis and DocuWare provide very similar features when it comes to importing your documents. You can bring them in manually, or you can set up a process to do it for you. You have options for reading barcodes, splitting documents, and performing OCR. Some improvements you’ll see in DocuWare are the ability to drag and drop documents right into the system. Once documents are brought in you get a thumbnail view of each document with a small tag identifying the file type so they are easy to identify.

Index

Assigning index information to a document is what allows us to find it easily when we need it, both Fortis and DocuWare provide the ability to do this. In Fortis, you are used to either indexing from an In Basket, or even right on import. In DocuWare, documents are typically indexed from a doc-tray (similar to an In Basket). A nice feature that DocuWare provides while indexing is type-ahead select lists. Fields are automatically provided a drop down list of all values that exist within the system. So for example, if you drop down the select list for vendor you will see all of the vendors you have entered in the past to select from. If you start to type in the name of a vendor, the list narrows down and you can either select the right value from the list, or finish typing the name to enter a new value. This feature helps to maintain data accuracy.

Another feature that will speed up indexing is One Click indexing. Since all documents that are imported have optical character recognition performed on them, a user simply has to hover over or highlight the text they want to use for index information and then click. The text is automatically populated into the first index field, and then the focus is moved on to the next index field. The user can quickly click on the information on the document and populate the index fields. After a piece of text is used in an index field, it is highlighted, so there is visual identification on the document of the index terms used.
Clicking on a piece of text sends it right to the active field. After text is added to index fields, it is highlighted to show it has been used for indexing.

While the features provided for manual indexing are quite useful, we know that automated indexing that requires little to no user input is preferable. There are OCR templates and schedules that have been traditionally used to automate as much of the process as possible (available in both products) but DocuWare provides a magic bullet with Intelligent Indexing. Intelligent Indexing not only almost eliminates manual indexing, it also almost eliminates the administrative tasks associated with setting up templates and the associated processes. The patent-pending technology for automatic indexing during document capture continuously learns from a user’s entries to identify the most relevant index entries, recommending increasingly accurate choices with each new document added. This makes archiving virtually automatic.

When you opt to use the Intelligent Indexing Service as a cloud service you benefit further thanks to crowd learning, which taps into the previous indexing patterns of others.

Two features that are currently only available in Fortis are field groups and Data Entry Assistant/Database Lookup, and in the future we will be introducing these into DocuWare. Field Groups are a single field that contains multiple columns of data, and can have additional rows added as necessary. For example, a table field containing Check Number, Date, and Amount fields could be used to track multiple checks used towards and invoice by simply listing each check in its own row. DEA functionality, the ability to perform an ad-hoc search to an external database to populate database fields from the user client, will be added as well. This functionality is currently available in DocuWare through scheduled import/indexing processes, and will be exposed so the user has the ability to perform a quality check on the data while indexing.

Search

In Fortis, you are used to using saved searches to locate your documents. The downside to these saved searches is that they don’t always have the flexibility that you need in order to locate documents. DocuWare’s Search dialogs are configured by an administrator to provide all of the functionality that a user might need to find any document in the system. They can be configured to search for static values, or to allow for complete flexibility in search criteria. Just like when you index documents, you have select lists that automatically populate with all entries within the system, and as we type, the list is narrowed down so that we can make an accurate selection. After you click search, you’re presented with a list of the returned documents. You can change the way your search results are displayed from a standard list with columns of index
data to a grid of document thumbnails, if it’s easier to identify what you’re looking for that way. Each search performed is kept open in its own tab. These tabs keep the results of your searches at hand until you choose to close the tab. Searches can be saved as lists that are easily accessed through the top menu for when the same search is run repeatedly, for example: the daily search for invoices that are due. Search results can easily be exported to Excel for reporting, and results lists can be emailed directly to colleagues easily.

In the future, a query engine similar to what Fortis offers will be introduced. It will provide even greater flexibility for searching, such as and/or logic and grouping of terms. For example, your accounting department is interested in getting insight to cash flow needs. They want to see all Accounts Payable invoices that are due in the next 30 days. They also want to see any particular high dollar invoices that are currently in the system. They can do this with a single query by grouping terms and using and/or logic as follows: (Invoice Type = “Accounts Payable” AND Due Date < 5/31/2015) OR (Invoice Type = “Accounts Payable” AND Amount > $10,000). This will return all Accounts Payable documents that are due within 30 days in addition to all that are over $10,000.

Also, as mentioned in the above example, the ability to perform date-based searches that calculate time from a specified date will be added. So using the example above you can create a search for all documents that are today’s date minus 30 days.

The idea of prompts will also be introduced in DocuWare. With this feature, a user is prompted to provide some index information, and that information is used to perform a search on various fields using a single entry. So for example, the prompt might read “Please enter record number”. You enter the invoice or PO number and the query in the background searches for (Document Type = “Invoice” AND Invoice Number = Record Number) OR (Document Type = “Purchase Order” AND PO Number = Record Number) OR (Document Type = “Emails” AND Subject contains Record Number). So any PO, Invoice, or email with the text entered in the prompt will be returned.

Working with Documents

With Fortis, you are used to opening your documents in the document viewer, navigating and rotating pages, applying annotations, or launching the native documents, and then saving them back into the system. One major limitation with Fortis is that only image files can be annotated. Native documents like PDFs, Word files, Excel spreadsheets or any other document other than an image file cannot be annotated. With DocuWare any file type can be annotated; so highlighting, adding notes, and drawing have no restrictions.

Like Fortis, DocuWare supports over 300 file types for viewing within the client, and all files are supported for storage. Fortis and DocuWare use the same toolkit for viewing documents, so if you are using Fortis to view documents now, you should see the same support with DocuWare. Documents that can’t be viewed in the viewer can always be launched to be viewed in the native application.

DocuWare also has a tree view available through Windows Explorer that allows access to the DocuWare system through the familiar Windows interface. The tree view is set up by an administrator with each folder level being defined by an index field in the file cabinet.
In Fortis you are used to having the folder structure right in the application. DocuWare is offering this currently with the before mentioned Windows Explorer Client. In the future, the DocuWare tree view will be incorporated into the client, so that documents can easily be navigated either locally or through the client using the folder structure that many people are familiar with. Also, the ability to search and navigate annotations will be added. So if you have a 100 page document, and you are searching for text annotations that a person has made, you can simply search for text that you know is contained within the annotation, or use the navigation to step to each page that contains an annotation until you find what you are looking for, without having to look at every page of the document.

Security

One of the most important functions of a Document Management system is to protect the documents that are stored within it, both from unauthorized access, and from a data loss perspective. In Fortis you are familiar with the complex level of security that is provided to make sure that only appropriate people have access to sensitive documents, as well as the feature access that can restrict what users are allowed to do with the documents they are allowed to see. DocuWare offers a refined rights system for accessing documents across user, group, and role levels. Through flexible filter functions, access can be defined down to each individual document. It’s also possible to adjust feature access – such as read, edit, markup, export, etc. – for even more detailed control, much like in Fortis. For particularly sensitive data, it’s possible to switch into high security mode. In this case, documents are further encrypted, so that they cannot even be accessed by a system administrator.

Since the DocuWare Client is browser based, communication through the Internet, from browser client to the server as well as various DocuWare components, is secured via HTTPS and SSL protocol.

DocuWare secures index criteria in different databases which are in turn separated from the actual documents, like in Fortis. Basic backup solutions can therefore be used to backup both the documents and the databases. DocuWare does not use a proprietary format like the Fortis MAG file.

In addition, DocuWare duplicates all index data. This means that in the very rare case of a database error, the database can be easily restored. Archive replication is also an option: a parallel archive that is placed somewhere in the world which is regularly synchronized with the main archive offers enhanced security, should an entire system be impaired or fail.

As another unique option, documents can be easily transferred into self-running archives on external hard drives or DVDs, which includes the database and its own search app.

Future improvements to DocuWare that come from the Fortis architecture include the ability to apply special security to Redaction annotations. This is to assure that the only people who see what is behind a redaction are those who are allowed to. Also, enhanced audit capability will be introduced as a way of examining the logs to see who did what and when within the system.
Appendix A: Test Drive DocuWare Demo Script

DocuWare and Fortis are very similar because they have the same end goal: to digitize your documents and automate business processes. That being said, there are differences in their architectures that we would like you to understand.

The purpose of this demonstration is to get you familiar with the DocuWare interface, and how the basic functions that you perform in Fortis or FortisBlue work in DocuWare. This demo covers Document Storage, Import, Index, and Search functions within DocuWare. You'll also review the basics of working with documents.

Before you begin, please collect two invoices from different vendors to use in the demonstrations. If you don’t have your own invoices handy, a simple Google Image search for “invoice” will return many results. If you go this route, make sure to select an invoice that is filled out, and try to select one from further down in the results to avoid the chances of using the same invoice as another person performing the demo. (Important for the Intelligent Indexing Demo)

Document Storage

As you know, in each Fortis Database, Document Types are defined. These Document Types determine what Index Fields are available for a document, and are also used to group documents in search results.

In DocuWare, we use a more flexible structure defined in File Cabinets. Each file cabinet defines a set of index fields for any document stored within. Then - we create several dialogs for Store, Search, and results lists which offer different subsets of a file cabinet's index fields.

This method results in a more flexible way to store our documents. All we have to do in DocuWare is create one index field called “document type” and set the values available in that field using a select list. Next we set up store, search and results dialogs as needed for the document types contained in the select list. Then we can use the Document Type field to find documents of only a specific type. There are more benefits to this method of indexing, for example, now you can search all document types stored, simply by leaving the Document Type field blank when you perform a search. In fact, now the document type no longer has to be the primary defining criteria. Vendor, Customer, Date, or any other field that you have stored index information on can be used to classify your documents.

1. Open the DocuWare client here: [https://docuware-online.com/DocuWare/Platform/WebClient?orgId=1191&culture=en-US](https://docuware-online.com/DocuWare/Platform/WebClient?orgId=1191&culture=en-US) (You may have to paste the URL into your browser.)
2. Login using: Organization: davino User: DemoDW Password: DWdemo#1
3. First let's look at searching
   a. Click on the Searches button
      i. Note that there are two file cabinets in this DocuWare installation, Accounting and Human Resources. There are search and store dialogs that correspond to each of those file cabinets.
   b. From the drop down select Accounting – Standard Search Dialog
   c. This dialog presents you with all of the fields available within the Accounting file cabinet
   d. Search for some documents:
      i. Enter Invoice In, Packing List or Purchase order in the Document Type field and click search to pull up each type of document.
      ii. Click the Change Search link at the upper left of the results to take you back to your search criteria to make changes
      iii. Leave the document type field blank and enter Dell or SHI in the Vendor Name field and click search. Notice that all documents stored with that Vendor name are returned.
      iv. Click the Change Search link
      v. Enter PO Number 11471, 11848 or 11876. Notice that this retrieves a 3 way match (PO, Invoice and Packing List) for the given Purchase Order.
   e. Now from the Searches drop down select Accounting – Find Invoice
      i. Notice that there are fewer fields to choose from, the Invoice Search dialog has hidden all of the extra index information that does not apply to invoices.
   f. Notice that when running a search from this dialog, the results list only shows appropriate information pertaining to Invoices – this is a subset of the full list shown in the Standard Search Dialog
4. Now let’s look at storage. A Document Tray is the equivalent of an In Basket in Fortis, and serves a similar purpose to an In Box in FortisBlue. Document Trays are a place where documents are stored until they are indexed and stored into the system.
   a. Click on the Document Trays button
   b. Select the Documents In tray from the drop down.
5. Now that we have a document tray open we can examine the store dialogs that are available to us.
   a. Select the document that is in the tray and then click the Store button
   b. From the drop down, notice that there are several choices for how to store the document, and that each store dialog corresponds to a specific file cabinet in DocuWare
   c. Choose the **Accounting-Standard Store Dialog**
   d. Notice the fields that are available to index the document – these are all of the fields available in the Accounting File Cabinet
   e. Hit Cancel
   f. Select your document and choose to store to **Accounting – Store PO**
   g. Note that there index fields have been reduced down to just those that apply to a Purchase Order

This illustrates how we can set up very flexible storage for your documents. We can choose which index fields to expose in our search and store dialogs so that users are not confused by extraneous fields, and in turn this makes it very easy to find all documents associated with a certain piece of index information that might be shared across document type.

### Import

Bringing documents into a Document Management system is a basic need. Both Fortis and DocuWare provide very similar features when it comes to importing your documents. You can bring them in manually, or you can set up a process to do it for you. You have options for reading barcodes, splitting documents, and performing OCR. One advantage you'll notice in DocuWare is the ability to drag and drop documents right into the system. Once documents are brought in you get a thumbnail view of each document with a small tag identifying the file type so it is easy to identify.

1. In the DocuWare Client click on document trays, and from the drop down menu choose **AP Auto Index**
2. Use one of the invoices that you have stored on your computer.
3. Drag it from Windows Explorer directly to the **AP Auto Index** Document Tray
4. Alternatively, with the **AP Auto Index** Document Tray open click the **Import** button and browse to the files you wish to upload.
5. Click the Gear/Arrow Icon, and notice that you can change the way you view documents between List, Table and Index Cards based on your personal preference.

### Index

Assigning index information to a document allows you to find it easily when you need it, both Fortis and DocuWare provide the ability to do this. In Fortis, you are used to either indexing from an In Basket or right on import. In DocuWare, documents are typically indexed from a doc-tray (similar to an In Basket). A nice feature that DocuWare provides while indexing is **type-ahead** select lists as described below:

1. Select an invoice that you just loaded to the Document Tray by clicking on it
2. Click the Store button, and from the drop down list select the **Accounting - Store Invoice** Dialog.
3. Click in the Vendor Name Field and click on the arrow to the right.
   ![Vendor Name Dropdown](image)
4. You will get a list of all Vendors stored in the system.
5. Now type the letter “S” – notice all of the Vendor’s that start with S show up.
6. Continue to type “t” and notice that the list is narrowed down to “Staples Credit Plan”

One Click indexing also speeds up the process. Since all documents that are imported have optical character recognition performed on them, a user simply has to hover over or highlight the text they want to use for index information and then click. The text is automatically populated into the first index field, and then the focus is moved on to the next index field. The user can quickly click on the information on the document and populate the index fields. After a piece of text is used in an index field, it is highlighted, so there is visual identification on the document of the index terms used.

1. Picking up where you left off above: with the cursor in the **Invoice Number** field
2. Select the One Click Indexing tool (ABC with arrow icon shown below) from the Tools tray which is found by clicking on the arrow at the top left of the document pane.
   ![One Click Indexing Tool](image)
3. Hover over any word on the document and notice that it is highlighted
4. You can also click and drag to select multiple words.
5. Once you release the OCR’d text will be added to the index field, the text that you selected will be highlighted in blue, and the cursor will advance to the next index field to be entered.
6. Repeat to select the date
7. Click back in the Invoice Number index field note that the text that has been used on the document is highlighted with a yellow halo to indicate what text has been used for that field visually
8. Click Store and notice that the document is stored and your are brought back to the document tray

While the features provided for manual indexing are quite useful, automated indexing that requires little to no user input is preferable. There are OCR templates and schedules that have been traditionally used to automate as much of the process as possible (available in both products) but DocuWare provides a magic bullet with Intelligent Indexing. Intelligent Indexing not only almost eliminates manual indexing, it also almost eliminates the administrative tasks associated with setting up templates and the associated processes. The patent-pending technology for automatic indexing during document capture continuously learns from a user’s entries to identify the most relevant index entries, recommending increasingly accurate choices with each new document added. This makes archiving virtually automatic. When you opt to use the Intelligent Indexing Service as a cloud service you benefit further thanks to crowd learning, which taps into the previous indexing patterns of others.

1. In this demonstration of Intelligent Indexing, we’ll be importing 3 invoices. We can use the same invoice for each import.
2. Start by selecting an invoice and dragging it to the AP Auto Index Document Tray
3. Watch the upper right hand corner of the thumbnail
   a. While processing this will be animated and gray
   b. Once recognized, this will change to a color
i. Red marking:
   1. The index words suggested by Intelligent Indexing are unreliable or there are no suggested terms. To get this status, all the fields must be red, i.e. Intelligent Indexing was very unreliable during index assignment.

ii. Yellow marking:
   1. The index words suggested by Intelligent Indexing are not very reliable. This status is assigned to all documents which are not marked as red or green.

iii. Green marking:
   1. The index words suggested by Intelligent Indexing are reliable. To get this status, all the fields must be green, i.e. Intelligent Indexing was very reliable during index assignment.

4. Chances are the document that you bring in will be Red, although it may not be if it has been indexed by someone else before.

5. You will teach Intelligent Indexing how to get reliable results by verifying the values it has selected, and using the one-click indexing to correct or fill in any empty fields. Depending on the certainty of the results that Intelligent Indexing returns on first import, you may have to do this two to three times, enough to advance from red, to yellow, to green. Once green certainty has been achieved, the system is very confident about the results.

6. Select your document from the Document Tray, and then click on the store button and select Accounting – Standard Store Dialog – notice that there is a small lightbulb icon next to it, this indicates that this will utilize the auto-index values that have been captured in the Document Tray

7. The index fields will be shown, and recognized values will be filled in.

8. There will be a stripe at the left edge of each field that is filled that is either Red, Orange or Green – indicating the confidence level in the recognition.

   a. Red: Intelligent Indexing is very unsure of the index word.
   b. Yellow: Intelligent Indexing is not 100% sure of the index word.
   c. Green: Intelligent Indexing is very sure of the index word.

9. If items are wrong, or missing, you can use the one click indexing tool to correct them or fill them in. This will teach Intelligent Indexing how to index these documents in the future.

10. Once you’ve corrected the index entries, click store.

11. Now drag the same document into the tray again and go through the same process. It should come in as orange or red the second time. Teach it again, and then store the document.
12. Drag the file in one more time. After teaching Intelligent Indexing 2 times, the service should be very sure of the index values you are looking for. The document should show green in the Document Tray. When you index the document, the fields should all have green indications also.

13. Now that the system has been taught where to find information on this document, every time an invoice with the same format is entered, the system will automatically recognize the index information and the documents can be stored without a need to enter or edit index information.

As you can see indexing documents, either manually or with Intelligent indexing, is very easy. Documents can quickly be brought into the system with very accurate results, and minimal manual typing of index information.

Search

In Fortis, you are used to using saved searches to locate your documents. The downside to these saved searches is that they don’t always have the flexibility that you need to locate documents. DocuWare’s search dialogs are configured by an administrator to provide all - the functionality that a user might need to find any document in the system. They can be configured to search for static values, or to allow for complete flexibility in search criteria. Just like when you index documents, you have select lists that automatically populate with all entries within the system, and as we type, the list is narrowed down so that we can make an accurate selection. After you click search, you’re presented with a list of the returned documents. You can change the way your search results are displayed from a standard list with columns of index data to a grid of document thumbnails, if it’s easier to identify what you’re looking for that way. Each search performed is kept open in its own tab. These tabs keep the results of your searches at hand until you choose to close the tab. Searches can be saved as lists that are easily accessed through the top menu for when the same search is run repeatedly, for example: the daily search for invoices that are due. Search results can easily be exported to Excel for reporting, and results lists can be emailed directly to colleagues easily.

1. Just like we saw before, clicking on the arrow to the right of any field will present you with a list of all values for documents stored in DocuWare. If you start typing a value into that field, the list will be narrowed down.

2. Click on Searches and select Human Resources - Standard Search Dialog
   a. Notice that a new tab is opened for this search, at any time you can navigate between tabs to view previous search results
   b. Drop down the First Name field and select “Bria” from the list, click search.
   c. The result is all documents stored for Bria – her employee file: containing NDA, Employee Evaluations, and her offer letter

3. Click on Searches and select Human Resources – Find Resumes
   a. Notice that the Document Type is set to Resume, and grayed out
   b. Enter a search term in Full Text, such as “SQL”, “Computer” or “Management”
   c. Open one of the results – notice that the word you searched for is highlighted on the document and you are taken to the first instance of that word.
   d. Under tools The Fulltext search continue tool (magnifying glass with arrow icon) will take you to the next “hit” for that word

Working with Documents

With Fortis, you are used to opening your documents in the document viewer, navigating and rotating pages, applying annotations, or launching the native documents, and then saving them back into the system. One major limitation with Fortis is that only image files can be annotated. Native documents like PDFs, Word files, Excel spreadsheets or any other document other than an image file cannot be annotated. With DocuWare any file type can be annotated; so highlighting, adding notes, and drawing have no restrictions.

1. Click the Searches button and choose Accounting – Find Invoice
2. Search for any invoice
3. Open a document returned
4. If the document tools are not showing, click the arrow in the upper right of the Viewer
There are several categories of tools for working with documents most of which are self-explanatory. Try using each tool to see how it works.

a. Tools
   i. Edit original documents
   ii. Send documents
   iii. View and edit index information
   iv. Search Full Text
   v. Download Document

b. Display
   i. Controls for Magnification and Rotation
   ii. Turn off/on view of annotations

c. Annotations
   i. Text
   ii. Highlight
   iii. Freehand Draw
   iv. Draw Line
   v. Draw Rectangle

d. Links

Like Fortis, DocuWare supports over 300 file types for viewing within the client, and all files are supported for storage. Fortis and DocuWare use the same toolkit for viewing documents, so if you are using Fortis to view documents now, you will find that the same files are supported with DocuWare. Documents that can’t be viewed in the viewer can always be launched to be viewed in the native application.

This demonstration provides a quick overview to show you how user-friendly and intuitive DocuWare is. We hope that this hands-on experience with the concepts explained in the White Paper has given you a better understanding of the advantages of DocuWare core features such as flexible storage, easy search and One-Click indexing. We are also pleased to give you a chance to use Intelligent Indexing which is just one of DocuWare’s many innovative add-on modules. Thank you for taking the time to learn more about how easily and efficiently DocuWare accomplishes document management tasks.