

# DocuWare Function Overview

DocuWare Version 7.10

# Overview of DocuWare Functions

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DocuWare is the modern platform for document management and workflow automation. It is available in the form of SaaS services from the cloud as well as a traditional on-premises solution, both with the same scope of application and the same design.

DocuWare as a cloud solution is available with flexible licenses for different company sizes and offers you maximum security, scalability, and availability. Automatic updates and backups keep you up to date at all times. Each subscription contains the full range of functions including Intelligent Indexing, Workflow Manager, DocuWare Forms, and many other applications. You only have to decide how many user licenses and how much storage you need.

On-premises solutions combine a server license with client licenses as well as add-on module licenses if necessary. Three different server editions cover different requirements: DocuWare BUSINESS Server is an entry-level solution for small businesses that do not require additional modules or larger file cabinets. DocuWare PROFESSIONAL Server allows midsize companies to have virtually unlimited file cabinet size and functional extensions through additional modules. With load balancing, clustering, and encryption, DocuWare ENTERPRISE Server meets the high performance and document security requirements of large companies. Additional modules extend the range of functions here as well.

Below is a list of all the main functions of DocuWare and its add-on modules, each listed with their availability in DocuWare Cloud and the various server editions. For client functions, their availability is also listed in the DocuWare Web Client and the Windows Explorer Client. There is also a separate chapter for special functions of the Windows Explorer Client.

## Key:

- ✓ = available
- +
- = not available
- Blank field = not applicable

*This document can be changed at any time before order confirmation. After order confirmation, this document can only be changed in accordance with the agreed contract conditions.*

Working with DocuWare – Basic Functions	DocuWare Cloud	On Premises			Web Client	Windows Explorer Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server		
<b>DocuWare Web Client</b>						
Online access to DocuWare via Browser, without client installation	✓	✓	✓	✓	✓	
View current cloud status	✓					
<b>DocuWare Windows Explorer Client</b>						
Access DocuWare via Windows Explorer	✓	✓	✓	✓		✓
<b>Space for All Documents: Capturing and Archiving Documents in DocuWare</b>						
Store all types of documents from any source in electronic file cabinets – create any number of file cabinets per DocuWare system	✓	✓	✓	✓	✓	✓
Store scanned documents, files, and emails in file cabinets	✓	✓	✓	✓	✓	✓
Display of the file cabinet in folder structures for intuitive document storage; transfer of folder names as index entries	✓	✓	✓	✓	✓	✓
Access the most important functions via shortcuts	✓	✓	✓	✓	✓	✓
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)		✓				
Maximum two billion documents per file cabinet – any document size	✓	-	✓	✓	✓	✓
Import of documents from the file system with drag & drop or button	✓	✓	✓	✓	✓	✓
Transfer imported files in the original format	✓	✓	✓	✓	✓	✓
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 Cloud: activated by default)	✓	-	-	✓		
Encrypt documents later at the storage location, e.g. if file cabinet encryption is only activated later	✓	-	-	✓		
Copy documents from one file cabinet to another – beginning with result list	✓	✓	✓	✓	✓	✓
<b>Electronic Document Trays: Organizing Documents Before Storage</b>						
Each user can create any number of electronic document trays in their DocuWare system to initially accommodate documents after they are scanned or imported	✓	✓	✓	✓	✓	✓
For perfect clarity: documents trays can be individually named; five colors can be selected for document trays	✓	✓	✓	✓	✓	✓
Import documents from the file system or the desktop into the document tray using drag and drop	✓	✓	✓	✓	✓	✓
Drag and drop a document from the document tray to a document in the result or task list to attach it	✓	✓	✓	✓	✓	-
Filter documents in the document tray by metadata, e.g. by document name or date	✓	✓	✓	✓	✓	-

Working with DocuWare – Basic Functions	DocuWare Cloud	On Premises			Web Client	Windows Explorer Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server		
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	✓	✓	✓	✓	✓	-
Option to staple multi-page documents or to unstaple documents in the document tray	✓	✓	✓	✓	✓	-
Option to select different views for the documents contained in the document tray: e.g. combination of mini preview image and index card view	✓	✓	✓	✓	✓	-
If several document trays are open, these are displayed with tabs and can be sorted by dragging and dropping them	✓	✓	✓	✓	✓	-
Display of the total page count for each document in the table and index card view	✓	✓	✓	✓	✓	-
Create document processing configurations for DocuWare Scan, Import, and Printer directly from the document in the document tray, and use the document as a sample document	✓	✓	✓	✓	✓	-
Call up Scan App using button in the document tray dialog	✓	✓	✓	✓	✓	-
<b>Storing Documents and Adding Index Words</b>						
Assignment of search criteria with user defined store dialogs; various store dialogs can be defined per file cabinet. Store dialogs consist of user defined fields, including in tabular form.	✓	✓	✓	✓	✓	✓
Quick input option for current date using the X key	✓	✓	✓	✓	✓	✓
Support for input using predefinable field masks; once created, the field masks are available for all dialog fields of an organization	✓	✓	✓	✓	✓	✓
Automatic check of index words for plausibility, validation	✓	✓	✓	✓	✓	✓
Fast indexing by pre-indexing documents in a document tray	✓	✓	✓	✓	✓	-
Select list of previously entered words for each store dialog; link for direct call up of "Select lists" module to process the relevant select lists	✓	✓	✓	✓	✓	✓
Fixed select list: specification of words for defined fields to ensure unique classification	✓	-	✓	✓	✓	✓
External select list: specification of index words from external databases	✓	-	✓	✓	✓	✓
External select list: specification of index words from external files	✓	-	✓	✓	✓	✓
Automatic storage of pre-indexed documents	✓	✓	✓	✓	✓	-
Automatic numbering of documents when storing	✓	✓	✓	✓	✓	✓
The folder names are adopted as index words when storing using folder structures	✓	✓	✓	✓	✓	✓
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	✓	✓	✓	✓	✓	✓

# Working with DocuWare – Basic Functions

	DocuWare Cloud	On Premises			Web Client	Windows Explorer Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server		
Define mandatory fields per dialog: Storage, search, and index dialogs can have different mandatory fields. Identification of mandatory fields with asterisks (*) in store	✓	✓	✓	✓	✓	✓
Change index entries of several documents at one time	✓	✓	✓	✓	✓	✓
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	✓	✓	✓	✓	✓	✓
Edit contents of index tables: insert new rows, duplicate or delete existing ones	✓	✓	✓	✓	✓	✓
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)	✓	-	+	+	✓	✓
<b>Quick and Easy Retrieval of Documents (see also separate chapter "Windows Explorer Client")</b>						
Document search using index words	✓	✓	✓	✓	✓	✓
Search several file cabinets at the same time	✓	-	✓	✓	✓	-
Option to enter index words with wildcards – asterisk search, etc.	✓	✓	✓	✓	✓	
Quick input option for current date using the X key	✓	✓	✓	✓	✓	
Select list(s) for each search field ensure that search terms can be entered quickly and without errors	✓	✓	✓	✓	✓	
Search with the logical operators AND, OR, and NOT (including for index filters)	✓	✓	✓	✓	✓	
Automatic saving of the last five searches so that they can be easily used again	✓	✓	✓	✓	✓	
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	✓	-	+	+	✓	
Hierarchical search using select lists	✓	✓	✓	✓	✓	
Definition of fields used for selective select lists	✓	-	✓	✓	✓	
Filter the text columns of result lists (text, date, and numeric fields)	✓	✓	✓	✓	✓	
Dynamic document relations: All documents belonging to the same process can be displayed in another result list—direct call-up in the result list or document viewer with identical index term in defined field(s). For example, all documents with the same project name are displayed in a linked result list; with the option of filtering related documents	✓	✓	✓	✓	✓	✓
Display of the file cabinet in folder structures for intuitive access to documents without filling in the search dialog	✓	✓	✓	✓	✓	✓

# Working with DocuWare – Basic Functions

	DocuWare Cloud	On Premises			Web Client	Windows Explorer Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server		
<b>Document and Data Export</b>						
Download documents from DocuWare, original file or PDF	✓	✓	✓	✓	✓	✓
Found documents can be exported in: Document tray, file system or email client	✓	✓	✓	✓	✓	✓
Create DocuWare Request from a result list	✓	✓	✓	✓	✓	
Export results list as CSV file (whole result list or just entries of the currently displayed page of the result list; possible encoding types: ANSI, ASCII, Big5, Shift JIS, UTF-8, UTF-16)	✓	✓	✓	✓	✓	
Export index data of documents as a CSV file in order to transfer it to third-party applications (with DocuWare Export additional license)	✓	-	+	+	-	
<b>Displaying Archived Documents</b>						
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	✓	✓	✓	✓	✓	
Documents with attachments are identified in the result list with a symbol	✓	✓	✓	✓	✓	
Emails are marked in the result list with a specific icon	✓	✓	✓	✓	✓	
Display documents in DocuWare Viewer – all normal file formats are supported	✓	✓	✓	✓	✓	✓
Display electronic invoices in XML format of the following standards legible to the human eye: - EN16931(CII and UBL) incl. XRechnung and FacturX - FatturaPA - KESF - FACTURAE	✓	+	+	+	✓	✓
Different file formats can also be displayed within a logical document – important for displaying emails with attachments, for example	✓	✓	✓	✓	✓	✓
Open several documents in separate Viewer windows simultaneously	✓	✓	✓	✓	✓	✓
Checksum control using button in the viewer and a following notification	✓	✓	✓	✓	✓	✓
Zoom factor for a document is automatically stored to display the following documents.	✓	✓	✓	✓	✓	✓
Documents displayed in optimum width without a margin in the Viewer using the "Fit to width for optimum display" option	✓	✓	✓	✓	✓	✓
Automatic image enhancement in DocuWare Viewer: Rotate and/or deskew document	✓	✓	✓	✓	✓	✓
Immediate display of the first document in a result or task list in DocuWare Viewer	✓	✓	✓	✓	✓	
Automatically refresh the display of a document in the DocuWare Viewer when it has been changed using the "Edit" function in the viewer	✓	✓	✓	✓	✓	✓
<b>Fulltext Indexing and Searches</b>						
Automatic fulltext indexing of file cabinets regardless of database used	✓	✓	✓	✓		

Working with DocuWare – Basic Functions	DocuWare Cloud	On Premises			Web Client	Windows Explorer Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server		
Fulltext indexing of scanned documents with powerful text recognition and of other common formats with an integrated text filter	✓	✓	✓	✓		
Option for fulltext search with wildcards before and after a word	✓	✓	✓	✓	✓	-
Option for phrase search and distance search	✓	✓	✓	✓	✓	-
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)	✓	✓	✓	✓	✓	-
In DocuWare Viewer, fulltext search terms are highlighted in the document, namely in the display of both scanned documents and other documents that are present as coded information (CI)	✓	✓	✓	✓	✓	-
Sorting of fulltext search results according to relevance, i.e. frequency of the index word	✓	✓	✓	✓	✓	-
Automatic recognition of the document language possible for all languages that use the Latin alphabet, as well as for Traditional Chinese, Simplified Chinese, Japanese, and Korean.	✓	✓	✓	✓	✓	-
Optimize full-text search per file cabinet for language families	✓	✓	✓	✓	✓	-
<b>Editing Documents</b>						
Archived documents can be opened and edited in the editor	✓	✓	✓	✓	✓	✓
Collaborate live on Microsoft Office documents in Word, Excel, or PowerPoint (Microsoft Office 365 license required)	✓	-	-	-	✓	-
Reply to archived emails from DocuWare (formats: MSG, EML)	✓	✓	✓	✓	✓	-
Attach a document from a document tray to a document in a DocuWare file cabinet	✓	✓	✓	✓	✓	-
<b>Editing Documents: DocuWare Viewer</b>						
Open and edit archived documents in DocuWare Viewer: Mark and annotate documents with overlays – the original document is not modified	✓	✓	✓	✓	✓	✓
Open info box for current document to view index entries and change them if necessary	✓	✓	✓	✓	✓	✓
Display document in the Viewer with index dialog	✓	✓	✓	✓	✓	✓
File properties are displayed in the Viewer as buttons and are copied to fields by clicking	✓	✓	✓	✓	✓	✓
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	✓	✓	✓	✓	✓	✓
Activate the touch mode even with a monitor that is not touch sensitive, allowing you to open documents with one click or select them via checkbox, for example	✓	✓	✓	✓	✓	-

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



Working with DocuWare – Basic Functions	DocuWare Cloud	On Premises			Web Client	Windows Explorer Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server		
<i>Further options for electronic signatures can be found in the DocuWare Signature Service section</i>						
<b>Forwarding/Sending Archived Documents</b>						
Send any document via email directly from a DocuWare document tray or viewer	✓	✓	✓	✓	✓	-
Send parts of documents by email, i.e. single files	✓	✓	✓	✓	✓	✓
Send several documents simultaneously by email directly from a result list	✓	✓	✓	✓	✓	-
Send hyperlink to a document by email	✓	✓	✓	✓	✓	✓
Send hyperlink to a result list by email	✓	✓	✓	✓	✓	-
Share archived documents via link in Microsoft Teams in chat or channel messages. Shared documents remain in DocuWare and the permissions defined in DocuWare apply even when accessed via Microsoft Teams	✓	-	-	-	✓	-
Copy a hyperlink to an archived document or a result list to the clipboard, e.g. to then insert it in other documents or	✓	✓	✓	✓	✓	✓
Use MAPI-compatible mail system	✓	✓	✓	✓	✓	✓
<b>Perfect Overview and Maximum User Convenience</b>						
Customize column width and functions for the result lists	✓	✓	✓	✓	✓	-
Columns in result lists can be individually sorted and enabled/disabled one at a time	✓	✓	✓	✓	✓	-
Display of number of documents in a list at the top of the list, colored highlighting if the number changes	✓	✓	✓	✓	✓	-
Search/store dialog can be customized for individual users or groups (Windows Explorer Client: store dialog only)	✓	✓	✓	✓	✓	✓
Display of user-specific functions directly via result list and document history (functions are specified in Configuration)	✓	✓	✓	✓	✓	-
Maximum reading clarity in a small area due to optimizing display	✓	✓	✓	✓	✓	✓
Automatic login and secure authorization of all connections to DocuWare using the OAuth2 standard	✓	✓	✓	✓	✓	-
Central overview of all configurations and applications using the current user's ID.	✓	✓	✓	✓		
User-interface language in personal settings has 24 languages to choose from	✓	✓	✓	✓	✓	
Configure out of office settings in user profile	✓	✓	✓	✓	✓	
DocuWare Update: Automatic notification that new DocuWare versions or hotfixes for components and apps of the DocuWare Client setup are available, sometimes also automatic installation	✓	✓	✓	✓		✓
Create data record without document in file cabinet, e.g. in order to attach documents downstream	✓	✓	✓	✓	✓	-
Trash bin: Automatically restore deleted documents from document trays and file cabinets within the retention period, without the need to access backups	✓	✓	✓	✓	✓	-

Working with DocuWare – Basic Functions	DocuWare Cloud	On Premises			Web Client	Windows Explorer Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server		
<b>Identity Management and Authentication</b>						
Single Sign-On (SSO) with Microsoft Active Directory (AD/NTLM)	-	✓	✓	✓	✓	✓
Single Sign-On (SSO) with Microsoft Azure Active Directory (AAD/OpenID Connect)	✓	✓	✓	✓	✓	✓
Single Sign-On (SSO) with Microsoft Active Directory Federation Services (ADFS/OpenID Connect)	✓	✓	✓	✓	✓	✓
Single Sign-On (SSO) with OpenID Connect; this also allows other SSO providers to be integrated for login to DocuWare	✓	✓	✓	✓	✓	✓
Enforce single sign-on for secure login	✓	✓	✓	✓	✓	✓
<b>DocuWare App for User Synchronization</b>						
<i>Easy user and group administration: integration and running synchronization of users and groups in external directory services with those of DocuWare system</i>	✓	✓	✓	✓		
<i>Microsoft Active Directory (LDAP) support</i>	✓	✓	✓	✓		
<i>Microsoft Azure Active Directory support</i>	✓	✓	✓	✓		
<b>DocuWare Printer App: Storing Documents Using the Print Function in Your Programs</b>						
<i>For the functions of the DocuWare Printer App, see the sections "DocuWare Printer App" and "Document Processing" in the chapter "DocuWare Desktop Apps."</i>						
<b>DocuWare Scan App: Scanning and Storing Documents</b>						
<i>For the functions of the DocuWare Scan App, see the section "Document Processing" in the chapter "DocuWare Desktop Apps."</i>						
<b>DocuWare Import App: Monitoring Folders and Importing Documents</b>						
<i>For the functions of the DocuWare Import App, see the chapter "DocuWare Import" and the section "Document Processing" in the chapter "DocuWare Desktop Apps."</i>						

<h2>DocuWare Desktop Apps</h2> <p>The Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>DocuWare Desktop Apps</b>				
Individual apps can be installed and uninstalled from the DocuWare main menu and from the Desktop Apps context menu in the Windows status bar	✓	✓	✓	✓
Search for updates for DocuWare Desktop Apps via tray menu	✓	✓	✓	✓
Filterable history with detailed information about each job, such as date/time, source, and status; with details about split documents; Option to export files from failed jobs and manually repeat them	✓	✓	✓	✓
User authorization via single sign-on	✓	✓	✓	✓
24 user-interface languages supported; automatic language selection according to the regional settings on the client computer	✓	✓	✓	✓
<b>DocuWare Printer App: Storing Documents Using the Print Function in Your Programs</b>				
Store documents in file cabinet	✓	✓	✓	✓
Store documents in document tray	✓	✓	✓	✓
Initiate the printer configuration from a document in the document tray and use the document as a sample document for a new configuration	✓	✓	✓	✓
Convert documents into PDF/A (long-term archiving format)	✓	✓	✓	✓
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)	✓	✓	✓	✓
Automatic reading of barcodes from defined readout areas of the document, e.g. invoice number (additional Barcode & Forms license needed)	✓	-	+	+
Filter barcodes with exact specification of characters (with Barcode & Forms additional license)	✓	-	+	+
Index document using fixed and dynamic entries	✓	✓	✓	✓
When indexing, you can combine fixed entries, dynamic entries, and text readout areas in an index field	✓	✓	✓	✓
Edit dynamic text entries in text, memo, and keyword fields as if they were readout text, e.g. <i>User name</i> or <i>Name of the parent folder</i>	✓	✓	✓	✓
Split the content of text readout areas in order to transfer individual parts to different index fields	✓	✓	✓	✓
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"	✓	✓	✓	✓
Filter out spaces and zeros from recognized text, e.g. delete spaces from IBAN numbers	✓	✓	✓	✓
Sample documents for reading text from file system	✓	✓	✓	✓

<h2>DocuWare Desktop Apps</h2> <p>The Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
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"	✓	✓	✓	✓
Automatic overlay of a invoice form, letterhead etc. - can be done separately for first page and subsequent pages	✓	✓	✓	✓
Process documents as transparent to prevent elements with a white background, for example, overlaying a stored letterhead logo	✓	-	✓	✓
Split multi-page documents after a set number of pages	✓	✓	✓	✓
Split multi-page documents following text criteria defined using readout areas (e.g. "Page 1")	✓	✓	✓	✓
Split multi-page documents after an empty readout area or if the content of the area changes	✓	✓	✓	✓
Split multi-page documents based on barcodes (additional Barcode & Forms license needed)	✓	-	+	+
Embed simple electronic signature in PDF	✓	✓	✓	✓
Only one printer appears for all DocuWare Printer configurations in the printer list for applications (automatic detection of the configuration to be used)	✓	✓	✓	✓
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)	✓	✓	✓	✓
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)	✓	✓	✓	✓
Add pages, e.g. append return form	✓	✓	✓	✓
Print a copy on a physical printer – with or without a form/letterhead	✓	✓	✓	✓
Print additional documents (e.g. General Terms and Conditions, a return form)	✓	✓	✓	✓
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)	✓	✓	✓	✓
Automatically attach edited document to a new email, e.g. electronic invoice	✓	✓	✓	✓
<b>Configuring DocuWare Printer App (in DocuWare Configuration)</b>				
Configurations are created and managed centrally and are immediately available on the Client (providing the relevant rights are in place)	✓	✓	✓	✓
Create configurations for DocuWare Printer App	✓	✓	✓	✓
Copy existing configurations	✓	✓	✓	✓
Deactivate configurations, e.g. for test purposes	✓	✓	✓	✓

<h2>DocuWare Desktop Apps</h2> <p>The Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App</p>	On Premises			
	DocuWare Cloud	BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Assign access rights with ease: Assign a configuration directly to individual users or via roles to all users that hold the role	✓	✓	✓	✓
The person who created the configuration automatically receives user and administrator rights	✓	✓	✓	✓
<b>DocuWare Scan App: Scanning and Storing Documents</b>				
Scan documents from any scanner (with TWAIN or WIA driver) that is installed on your local PC	✓	✓	✓	✓
Open DocuWare Scan App directly from the document tray	✓	✓	✓	✓
Store documents in file cabinet	✓	✓	✓	✓
Store documents in document tray	✓	✓	✓	✓
Convert documents into PDF/A (long-term archiving format)	✓	✓	✓	✓
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)	✓	-	+	+
Index document using fixed and dynamic entries	✓	✓	✓	✓
When indexing, you can combine fixed entries and dynamic entries with text readout areas in an index field (additional DocuWare Import license needed)	✓	-	+	+
Split the content of text readout areas in order to transfer individual parts to different index fields	✓	✓	✓	✓
Filter out spaces and zeros from recognized text, e.g. delete spaces from IBAN numbers (with additional DocuWare Import and Barcode & Forms licenses)	✓	-	+	+
Index document using 1D and 2D barcodes (additional Barcode & Forms license needed)	✓	-	+	+
Select barcode type that is to be searched and used for the indexing (additional Barcode & Forms license needed)	✓	-	+	+
Split the content of barcode readout areas in order to transfer individual parts to different index fields (additional Barcode & Forms license needed)	✓	-	+	+
Select sample documents for reading out text or barcodes from file system (additional Barcode & Forms license needed)	✓	-	+	+
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)	✓	-	+	+
Automatic overlay of a invoice form, letterhead etc. - can be done separately for first page and subsequent pages (additional Barcode & Forms license needed)	✓	-	+	+
Split multi-page documents after a set number of pages	✓	-	✓	✓
Split multi-page documents following text criteria defined using readout areas (e.g. "Page 1" (additional Barcode & Forms license needed)	✓	-	+	+

<h2>DocuWare Desktop Apps</h2> <p>The Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Split multi-page documents after an empty readout area or if the content of the area changes (additional Barcode & Forms license needed)	✓	-	+	+
Split multi-page documents based on barcodes (additional Barcode & Forms license needed)	✓	-	+	+
Embed electronic signature in PDF	✓	✓	✓	✓
Automatic recognition of the document language possible (except for Greek and Cyrillic languages)	✓	✓	✓	✓
Automatic rotating and aligning of pages that were scanned in the wrong direction or at an angle	✓	✓	✓	✓
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	✓	✓	✓	✓
Large preview of the scanned pages	✓	✓	✓	✓
Rearrange the pages within a document using drag & drop	✓	✓	✓	✓
Manually delete pages and documents, e.g. blank or poorly scanned pages	✓	✓	✓	✓
Automatic deletion of separating pages (additional Barcode & Forms license needed)	✓	-	+	+
Automatic deletion of blank pages	✓	✓	✓	✓
Add pages at a later date using drag & drop, e.g. if certain pages were inserted at an angle	✓	✓	✓	✓
Direct adding of pages at a later date with a single click	✓	✓	✓	✓
Manually rotate pages scanned in incorrect direction after scanning	✓	✓	✓	✓
Split documents manually	✓	✓	✓	✓
Scan each sheet as a new document in order to scan in and store multiple single sheet invoices in the stack, for example	✓	✓	✓	✓
Set scan settings based on your scanner's normal settings (e.g. scanning and color options)	✓	✓	✓	✓
Display devices dialog of the scanner so that all device-specific scan options can be used	✓	✓	✓	✓
Automatically attach scanned document to a new email	✓	✓	✓	✓
<b>DocuWare Import App: Monitoring Folders and Importing Files</b>				
<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 &amp; Forms" license, see the "Barcode &amp; Forms" chapter</i>				

<h2>DocuWare Desktop Apps</h2> <p>The Desktop Apps are part of the DocuWare Basic Version and provide you with the Printer App, Scan App, Smart Connect, and Import App</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Document processing configurations for scanning, importing from folders, and printing with DocuWare Printer (in DocuWare Configuration)</b>				
Configurations are created and managed centrally and are immediately available on the Client	✓	✓	✓	✓
Create configurations	✓	✓	✓	✓
Copy existing configurations	✓	✓	✓	✓
Deactivate configurations, e.g. for test purposes	✓	✓	✓	✓
Assign access rights with ease: Assign a configuration directly to individual users or via roles to all users that hold the role	✓	✓	✓	✓
The person who created the configuration automatically receives user and administrator rights	✓	✓	✓	✓
Import and export of configurations in JSON format	✓	✓	✓	✓
<b>DocuWare Smart Connect App</b>				
See "Smart Connect" chapter (additional license)	✓	✓	✓	✓
<b>DocuWare Export App</b>				
See the chapter "DocuWare Export" (additional license)	✓	-	+	+
<b>Managing Connections to the DocuWare System</b>				
Establish a connection to the DocuWare system from which DocuWare Desktop Apps was installed	✓	✓	✓	✓
Activate connections	✓	✓	✓	✓
Remove connections from the connections list	✓	✓	✓	✓
Display active connections in the DocuWare Desktop Apps context menu	✓	✓	✓	✓



<h1>DocuWare Configuration</h1> <p>Browser-based configuration platform for setting up the DocuWare components</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Configuring DocuWare</b>				
See the relevant chapter for configuration of components not mentioned here and DocuWare basic functions				
Open DocuWare Configuration directly from DocuWare – no installation required	✓	✓	✓	✓
<b>General: Organization settings (for administrators)</b>				
Enable content sharing with Microsoft Teams (with Connect to Teams additional license)	✓	+	+	✓
Enable online editing of Microsoft Office files (Microsoft 365 license required)	✓	-	-	-
Copy GUID of the organization, e.g. to create URL integrations	✓	✓	✓	✓
Set up participation in the diagnostic and feedback program (CEIP)	✓	✓	✓	✓
Set time zone and language (for automated processes in Workflow Manager)	✓	✓	✓	✓
Set default encoding for CSV file export (possible encoding types: ANSI, ASCII, Big5, Shift JIS, UTF-8, UTF-16)	✓	✓	✓	✓
<b>General</b>				
Set up single sign-on with identity service provider selection	✓	✓	✓	✓
Enforce single sign-on for secure login	✓	✓	✓	✓
Automatically log off inactive users from DocuWare Client and DocuWare Configuration; with notification	✓	✓	✓	✓
Enable guest login with predefined DocuWare user	✓	✓	✓	✓
Enable and define password policy	✓	✓	✓	✓
Define minimum password length	✓	✓	✓	✓
Enable and define password complexity (upper and lower case characters, numbers, and special characters)	✓	✓	✓	✓
Define expiration period of a password	✓	✓	✓	✓
Define the number of incorrect password entries after which the user account will be locked and for how long	✓	✓	✓	✓
Notification when password is about to expire to remind user to change it	✓	✓	✓	✓
View and change passphrase for encryption of access via URL integration	✓	✓	✓	✓
Define restricted file types to prevent the storage of such file types in DocuWare.	✓	✓	✓	✓
<b>User administration</b>				
Set up users, groups, roles, and function profiles	✓	✓	✓	✓
Structuring of users into groups	✓	✓	✓	✓
Assignment of roles to groups	✓	✓	✓	✓
Direct assignment of individual rights, profiles and roles to different users	✓	✓	✓	✓



DocuWare Configuration Browser-based configuration platform for setting up the DocuWare components	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Set up inbox (default document tray) for user	✓	✓	✓	✓
Unblock user accounts as a user with the "User Management" right	✓	✓	✓	✓
Disable the time limits for individual users' passwords	✓	✓	✓	✓
Specify users as out of office	✓	✓	✓	✓
<b>Rights Administration</b>				
Assign rights to users and administrators for editing configurations	✓	✓	✓	✓
Functional rights: access to individual functions, stamps, select lists, templates; definition at organization level	✓	✓	✓	✓
Profiles: grouping of functional rights into function profiles	✓	✓	✓	✓
Roles: combination of function profiles and file cabinet profiles according to task	✓	✓	✓	✓
Predefined roles: System Administrator and Organization Administrator	✓	✓	✓	✓
<b>Audit reports</b>				
Evaluate access to documents	✓	✓	✓	✓
Identify who deleted a specific document	✓	✓	✓	✓
Identify who changed a specific configuration, and when	✓	✓	✓	✓
Track the DocuWare application that was used to log in, e.g. Web Client or DocuWare Desktop Apps, but also access via mobile app or via platform	✓	✓	✓	✓
Export audit report data as CSV file (encoding type according to organization setting)	✓	✓	✓	✓
Demonstrate compliance with compliance guidelines	✓	✓	✓	✓
<b>Mail services</b>				
Set up connections to SMTP servers organization-wide for notifications (send emails from personalized address), one SMTP each for Workflow Manager and Task Manager	✓	-	+	+
<b>Capturing</b>				
<b>Document processing</b>				
See the chapters "DocuWare Basic Version" and "DocuWare Import"				
<b>Text and barcode recognition</b>				
Automatic or manual language selection; languages: Albanian, Arabic, Belorussian, Bulgarian, Catalan, Chinese (Traditional and Simplified), Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Hebrew, Hungarian, Icelandic, Italian, Japanese, Korean, Lithuanian, Macedonian, Malay, Maltese, Moldovan, Norwegian, Polish, Portuguese, Romanian, Russian, Serbian, Slovak, Spanish, Swedish, Thai, Turkish, Vietnamese	✓	✓	✓	✓

DocuWare Configuration Browser-based configuration platform for setting up the DocuWare components	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Optimize recognition for speed or precision	✓	-	+	+
Assign configurations for text recognition of individual users or roles	✓	-	+	+
<b>Forms</b>				
See the chapter "DocuWare Forms"				
<b>Emails from Outlook</b>				
See the chapter "Connect to Outlook"				
<b>Emails general</b>				
See the chapter "Connect to Mail"				
<b>Indexing</b>				
<b>Indexing assistance</b>				
Create field masks	✓	-	✓	✓
Create select lists	✓	-	✓	✓
Create external select lists	✓	-	✓	✓
Connect external select lists	✓	-	✓	✓
Filter external select lists: In Cloud systems, the contents from database connections can be restricted using filter criteria, in on-premises systems using SQL commands	✓	-	✓	✓
<b>Intelligent Indexing</b>				
See the chapter "Intelligent Indexing"				
<b>Autoindex</b>				
See the chapter "Autoindex"				
<b>Document storage</b>				
<b>File cabinets</b>				
Create file cabinet with predefined file cabinet components: Numerous database fields e.g. "Company" are available for each new file cabinet. The fields can be combined for store and search dialogs, as well as result lists.	✓	✓	✓	✓
Create lists	✓	✓	✓	✓
Set up full text	✓	✓	✓	✓
Specify language area for full text support per file cabinet	✓	-	-	-
Reset full-text data	✓	✓	✓	✓
Use system fields in search dialogs, result lists, and lists	✓	✓	✓	✓
Enable version management	✓	✓	✓	✓
Automatically check document integrity via checksum	✓	✓	✓	✓

<h2>DocuWare Configuration</h2> <p>Browser-based configuration platform for setting up the DocuWare components</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Create index tables, e.g. for accounting transactions in which invoice amounts are to be distributed to different cost centers; whether the total is displayed for a table column can be defined individually for each storage and index dialog	✓	✓	✓	✓
Rearrange table columns in store and index dialogs and hide unnecessary columns	✓	✓	✓	✓
Change standard fields when creating a file cabinet	✓	✓	✓	✓
Create fields	✓	✓	✓	✓
Define mandatory fields per dialog: store, search and index dialogs can have different mandatory fields, including index tables	✓	✓	✓	✓
Define read-only fields per dialog: store, search and index dialogs can have different read-only fields, including index tables	✓	✓	✓	✓
Use existing field masks	✓	✓	✓	✓
Predefine indexing	✓	✓	✓	✓
Create folder structures	✓	✓	✓	✓
Group file cabinet rights into profiles and assign users and roles, e.g. access rights to documents in file cabinets	✓	✓	✓	✓
Assign file cabinet rights via index filter	✓	✓	✓	✓
Assign archive rights via index filter with free SQL query	-	✓	✓	✓
Overview of the four default profiles Read, Write, Owner, and Delete	✓	✓	✓	✓
Activate Intelligent Indexing	✓	+	+	+
Assign dialog fields to Intelligent Indexing fields	✓	+	+	+
High security level for file cabinet and users; only users with high security level can access a file cabinet with a high security level	✓	-	-	✓
Redundant backup of index data in DWX files	-	✓	✓	✓
Encrypt documents and headers by linking to AED and RSA procedures	✓	-	-	✓
<b>Document relation</b>				
Create and edit relations between a document and other documents	✓	✓	✓	✓
<b>Deletion policies</b>				
Create deletion policies: Delete documents and index data; receive only current document version (in file cabinets with version management enabled)	✓	-	✓	✓
Terminate delete jobs	✓	-	✓	✓
<b>Synchronization</b>				
Synchronization of two file cabinets (local/external or local/local) using globally unique GUIDs	-	-	✓	✓

<h2>DocuWare Configuration</h2> <p>Browser-based configuration platform for setting up the DocuWare components</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Different structures in file cabinets possible, mapping of index fields	-	-	✓	✓
Configurable conflict solution, in the event that documents in both file cabinets were modified at the same time	-	-	✓	✓
Flexible scheduling of the synchronization orders	-	-	✓	✓
<b>Transfer</b>				
Transfer of existing file cabinets within the system to existing target file cabinets	✓	-	✓	✓
Transfer of all document versions (with version management enabled), index entries, system entries, and fulltext	✓	-	✓	✓
Filter documents	✓	-	✓	✓
Export into other DocuWare system	-	-	✓	✓
Scheduled workflow	✓	-	✓	✓
<b>Collaboration</b>				
<b>Notifications</b>				
See the chapter "Task Manager"				
<b>Request</b>				
See the chapter "Request"				
<b>Stamps</b>				
Setting up stamps with direct display of content	✓	✓	✓	✓
<b>Personal</b>				
<b>Document trays</b>				
Create document trays and assign them to multiple users, e.g. an entire department	✓	✓	✓	✓
Automatically create document trays for imported users	✓	✓	✓	✓
A document tray location (combination of storage location and database connection) can be selected to increase performance per document tray	-	✓	✓	✓
Size limit for document trays	-	✓	✓	✓
Activate Intelligent Indexing for document trays	✓	+	+	+
<b>Email accounts</b>				
See the chapter "Connect to Mail"				
<b>Integrations</b>				
<b>Smart Connect</b>				
See the chapter "Smart Connect"				
<b>Web Services</b>				
Centrally manage connections to external web services (REST, SOAP)	✓	✓	✓	✓

<h2>DocuWare Configuration</h2> <p>Browser-based configuration platform for setting up the DocuWare components</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Manage webhooks (REST), e.g. set up notifications to be sent automatically when documents are newly stored in a file cabinet or their index entries are modified; validation of the body and test request possible with dummy data. Quickly create automatic notifications for Slack or Microsoft Teams with templates Notifications for Slack or Microsoft Teams using templates	✓	✓	✓	✓
<b>Data export</b>				
See the chapter "DocuWare Export"				

<h2>DocuWare Mobile</h2> <p>With DocuWare Mobile, you can access DocuWare directly from your mobile device—whether iPhone or Android smartphone. DocuWare Mobile is included with a DocuWare Cloud license. For an on-premises version, a PROFESSIONAL or ENTERPRISE Server Edition and the DocuWare Mobile additional license are required to use the mobile DocuWare app.</p> <p>The DocuWare Mobile app functionality is independent of DocuWare versioning. The functions mentioned below refer to the status of the app when the DocuWare version mentioned in the introduction was released, while the checkmarks refer to the functions of the app. You can find out the current feature set of DocuWare Mobile in the App Store and the Google Play Store.</p>	iPhone	Android-Geräte
<b>Retrieving Documents</b>		
Display documents in the DocuWare Viewer specially adapted for mobile devices, including index card view - regardless of the format in which the documents were	✓	✓
Call up search dialogs and task lists	✓	✓
Use select lists and selective select lists in search dialogs	✓	✓
<b>Storing documents</b>		
Store documents in the file cabinet with the share function	✓	✓
Load documents from other apps to DocuWare Mobile using share function	✓	✓
Load and display documents in document tray and store them in file cabinet from there	✓	✓
Use select lists and filtered select lists in store dialogs	✓	✓
Use Intelligent Indexing suggestions in store dialogs	✓	✓
<b>Editing Documents</b>		
Control workflows based on Task Manager using mobile devices: support for DocuWare stamp functions (keyword fields are not supported), including image stamps; edit index data	✓	✓
Add, edit, and delete index entries of archived documents, including entries from index tables	✓	✓
<b>Edit task lists (with Workflow Manager license)</b>		
Practical list that gathers together the tasks to be processed and the documents associated with them	✓	✓
Edit tasks: Make decisions by setting stamps	✓	✓
Edit index tables of workflow documents, e.g. assign or release individual invoice items to cost center	✓	✓
<b>Connecting Mobile Apps to DocuWare</b>		
Set up, edit, and delete connections; with connection name, host name, user name, and organization; open connection details in a list and display with one click; connect to DocuWare using a QR code; integrated QR code scanner	✓	✓
User authorization via single sign-on	✓	✓

## DocuWare Mobile

With DocuWare Mobile, you can access DocuWare directly from your mobile device—whether iPhone or Android smartphone. DocuWare Mobile is included with a DocuWare Cloud license. For an on-premises version, a PROFESSIONAL or ENTERPRISE Server Edition and the DocuWare Mobile additional license are required to use the mobile DocuWare app.

The DocuWare Mobile app functionality is independent of DocuWare versioning. The functions mentioned below refer to the status of the app when the DocuWare version mentioned in the introduction was released, while the checkmarks refer to the functions of the app. You can find out the current feature set of DocuWare Mobile in the App Store and the Google Play Store.

iPhone

Android-Geräte

### Security

Transfer documents from DocuWare Server to DocuWare Mobile using HTTPS (secure encryption of the protocol using SSL)



<h2>Connect to Teams</h2> <p>Make collaboration easier in your document-based processes by integrating Microsoft Teams with DocuWare. This allows you to share archived documents via link in Microsoft Teams. Or you can store documents in the file cabinet in the Teams interface via the DocuWare app.</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Share documents from DocuWare in Teams</b>				
Share archived documents via link in Microsoft Teams in chat or channel messages. Shared documents remain in DocuWare and the permissions defined in DocuWare apply even when accessed via Microsoft Teams	✓	-	+	+
<b>Integrate elements of DocuWare into Teams</b>				
Integrate DocuWare lists (in the form of archive dialogs) as tabs in chats or channels for direct access from Teams to contained documents. Available document functions: open in viewer (new browser tab), copy link, share in teams, download. (additional Task Manager license needed)	✓	-	+	+
Integrate DocuWare tasks (workflow lists) as tab in chats or channels for direct editing of the contained tasks from Teams. Open workflow task together with document in viewer in new browser tab, familiar functions available in task form and viewer. Additional document functions: Copy document link, share in Teams, download. (additional Workflow Manager license needed)	✓	-	+	+
<b>Transfer documents from Teams to DocuWare</b>				
Import documents contained in chat or channel messages from Teams to document tray	✓	-	+	+
Store documents contained in chat or channel messages from Teams in DocuWare file cabinet	✓	-	+	+
One Click Indexing for transferring document contents as index words during archiving	✓	-	+	+



<h2>Connect to Outlook</h2> <p>Use Connect to Outlook to conveniently archive your emails directly in DocuWare from Microsoft Outlook and use quick search to access stored emails</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Archiving Emails</b>				
Store in DocuWare file cabinet	✓	-	+	+
Store in DocuWare document tray	✓	-	+	+
Emails can be archived in the following formats: MSG (Outlook) and PDF	✓	-	+	+
Recognize appended electronic invoices in PDF format with the ZUGFeRD 2.2 standard and automatically process them further (additional DocuWare Import license needed)	✓	-	+	+
Recognize appended electronic invoices in XML format with standards (such as XRechnung or FatturaPA) and automatically process them further (additional DocuWare Import license needed)	✓	-	+	+
Use information from PDF and XML invoices in email attachment for indexing (with DocuWare Import additional license)	✓	-	+	+
Store emails via DocuWare menu bar or context menu	✓	-	+	+
Archive email attachment directly by right-clicking on the attachment and using the context menu	✓	-	+	+
Send and store emails from Outlook in a single step	✓	-	+	+
Store email and attached files as one document	✓	-	+	+
Store email and attached files as individual documents	✓	-	+	+
Store email without attached files	✓	-	+	+
Store attached files without email	✓	-	+	+
After storage in Outlook, mark the email as archived with the "DocuWare" category	✓	-	+	+
After storage in Outlook, delete only the email's attached files	✓	-	+	+
After storage, delete email including possible attachments in Outlook	✓	-	+	+
Choose what to show first in stored document: Email or Attachments	✓	-	+	+
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), only appended files, or only email	✓	-	+	+
Remove images from the archiving that are embedded in the message text	✓	-	+	+
Any number of different storage destinations can be defined: the emails are sent to their specific destination according to the configuration selected	✓	-	+	+
Storage by dragging & dropping an email into monitored folder; emails can remain in the monitored folder. Monitored folders (with subfolders if necessary) are created automatically	✓	-	+	+

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	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Email stored to Watched Folders can be filtered by Sender, Sender Domain, Subject, Recipient or Recipient Domain	✓	-	+	+
Storage with and without store dialog	✓	-	+	+
If mandatory fields are not set, the store dialog always opens (even with other settings)	✓	-	+	+
<b>Accessing Archived Documents – Using Quick Search</b>				
Find documents archived in DocuWare connected to an email at the click of a button (e.g. from the same sender)	✓	-	+	+
If only the attachments of an email were deleted in Outlook: access these attachments again at the click of a button	✓	-	+	+
Access DocuWare lists from Outlook (with additional Task Manager license)	✓	-	+	+
<b>Configuring Email Storage and Quick Search (in DocuWare Configuration)</b>				
Any number of configurations can be set centrally. They can be assigned directly to users or via certain roles. Non-administrators (simple users) can create configurations for themselves	✓	-	+	+
Start new configurations from Outlook in the Store and Quick Search selection menus, or by right clicking on a folder	✓	-	+	+
Index words that can be used for archiving: fixed values, predefined entries (CURRENTDATE, etc.), email properties (sender, subject, etc.) and information from Outlook contact of the recipient/sender (name/company, etc.)	✓	-	+	+
Select information from other DocuWare file cabinets as index words; email addresses can be used as match code	✓	-	+	+
Support of other external SQL databases (MySQL, MSSQL, Oracle) for automatic expansion of index words: email addresses can be used as match code	✓	-	+	+
Avoid duplicate storage of emails by using the mail system's message ID for indexing	✓	-	+	+
Exclude chosen file formats from email storage with the option to filter those formats by size. This allows business cards or company logos in email signatures, which would otherwise be saved as a separate file, to be skipped	✓	-	+	+
If mandatory fields are not set, the store dialog always opens (even with other settings)	✓	-	+	+
Define mandatory fields per dialog: Storage, search, and index dialogs can have different mandatory fields. Identification of mandatory fields with asterisks (*)	✓	-	+	+
Use fixed values as index words for quick searches	✓	-	+	+
Select storage type: Email and appended files (show email first), email and appended files (show attachment first), or only appended files	✓	-	+	+
Select email properties as index words for quick searches (sender, subject, etc.)	✓	-	+	+
Use predefined entries as index words for quick searches (e.g. CURRENTDATE (-30) for the last 30 days)	✓	-	+	+

<h2>Connect to Outlook</h2> <p>Use Connect to Outlook to conveniently archive your emails directly in DocuWare from Microsoft Outlook and use quick search to access stored emails</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Select information about the recipient/sender from the Outlook contact (name, company, etc.) as index words for quick searches	✓	-	+	+
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	✓	-	+	+
In quick search, use the storage date as a search criterion, thus limiting the results, for example, to the last 14 days	✓	-	+	+

<h2>DocuWare Outlook add-in</h2> <p>The DocuWare Outlook add-in makes it easy to connect DocuWare Cloud with Microsoft Outlook, both with the web and desktop versions. The add-in can be used with Outlook web versions regardless of browser and operating system, including Mac operating systems. Users can save their emails to a DocuWare document tray or directly to the file cabinet and select which attachments should be transferred to DocuWare.</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Store email</b>				
Store single email to file cabinet	✓	-	-	-
Store single email to document tray	✓	-	-	-
Store email body	✓	-	-	-
Include all or selected attachments when storing	✓	-	-	-
Store attachment(s) only	✓	-	-	-
Email and attachments are stored as one clipped document	✓	-	-	-
Emails can be archived in the EML format	✓	-	-	-
<b>Indexing</b>				
Show store dialog during storage	✓	-	-	-
Pre-filled fields	✓	-	-	-

<h2>Connect to Mail</h2> <p>With Connect to Mail, you can conveniently load and archive the emails from your Google account into DocuWare</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Archiving Emails</b>				
Call up emails from webmail clients	✓	-	+	+
Call up emails from Microsoft Office 365	✓	-	+	+
Call up emails from Microsoft Exchange Server	✓	-	+	+
Call up emails from IMAP server	✓	-	+	+
Store in DocuWare file cabinet	✓	-	+	+
Store in DocuWare document tray	✓	-	+	+
Archive emails in original EML format or as PDF	✓	-	+	+
Delete emails with attachments or move them to another folder, both emails with and without attachment	✓	-	+	+
Archive mail text and attachments individually as separate documents	✓	-	+	+
Any number of different store targets can be defined: the emails are sent to their specific destination according to the monitored folder selected in the store name	✓	-	+	+
<b>Configuring Email Storage (in DocuWare Configuration)</b>				
Autodiscover settings from Mail Server	✓	✓	✓	✓
Any number of storage configurations can be set centrally. They can be assigned directly to users or via certain roles	✓	-	+	+
Administrator can create storage configurations for all users	✓	-	+	+
Use fixed values as index words for archiving	✓	-	+	+
Select email properties as index words for archiving (sender, subject, etc.)	✓	-	+	+
Save email attachments as individual documents	✓	✓	✓	✓
Choose the trash can for deleted emails (user or Microsoft Exchange trash can)	✓	✓	✓	✓
Select storage type: Email and appended files (show email first), email and appended files (show attachment first), email without attachment or only appended files	✓	-	+	+
Exclude selected file formats from email storage with the option to filter those formats by size. This allows to skip business cards or company logos in email signatures, which would otherwise be saved as a separate file	✓	-	+	+
Automatic download of images can be disabled, e.g. for protection against phishing emails	✓	-	+	+

<h1>Import</h1> <p>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</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Storage targets and general settings</b>				
Store documents in document tray	✓	✓	✓	✓
Store documents in file cabinet	✓	✓	✓	✓
Select sample document from file system	✓	✓	✓	✓
Start an import configuration from a document in the document tray (that was printed by DocuWare Printer)	✓	✓	✓	✓
<b>Sources</b>				
Monitor file folders for automatic import of files	✓	✓	✓	✓
Folder to monitor freely selectable (directory on local PC or server/network)	✓	✓	✓	✓
Import scanned documents via network scanner	✓	✓	✓	✓
Schedule a check of the import directory for new files: continuously or at flexibly configurable intervals (additional DocuWare Import license needed)	✓	+	+	+
Check minimum age of files to prevent importing incomplete files	✓	✓	✓	✓
<b>Indexing</b>				
Automatic transfer of fixed entries as index words	✓	✓	✓	✓
Automatic transfer of dynamic entries as index words, e.g. user, file name, file extension, creation or modification date	✓	✓	✓	✓
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)	✓	-	+	+
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)	✓	-	+	+
Split the content of text readout areas to transfer separate parts to different index fields (additional DocuWare Import and Barcode & Forms licenses needed)	✓	-	+	+
Replace the content of text readout areas with different text, e.g. replace the index word "Invoice" with the expanded term "Invoice – output", you can also do this for individual characters (additional DocuWare Import and Barcode & Forms licenses needed)	✓	-	+	+
Filter out spaces and zeros from recognized text, e.g. delete spaces from IBAN numbers (with additional DocuWare Import and Barcode & Forms licenses)	✓	-	+	+
Switch off text and barcode recognition at import in order to speed up document processing when this function is not required	-	-	✓	✓

<h1>Import</h1> <p>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</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Barcode Processing</b>				
Index document with 1D and 2D barcodes (additional DocuWare Import and Barcode & Forms licenses needed)	✓	-	+	+
Identify and classify document according to text criteria or bar code (with additional DocuWare Barcode & Forms license)	✓	-	+	+
Split the content of barcode readout areas to transfer separate parts to different index fields (additional DocuWare Import and Barcode & Forms licenses needed)	✓	-	+	+
Select barcode type to be searched for and used for indexing (additional DocuWare Import and Barcode & Forms licenses needed)	✓	-	+	+
Filter barcodes with exact specification of characters	✓	-	+	+
Select line(s) from multi-line barcode to be written to the index field, e.g. to completely transfer invoice contents from barcodes and distribute them to individual fields	✓	-	+	+
Split multi-page documents after barcodes (additional DocuWare Import and Barcode & Forms licenses needed)	✓	-	+	+
Split multi-page documents when changing barcodes, e.g. when batch scanning paper documents, each of which has its own barcode	✓	-	+	+
<b>Further Processing</b>				
Split multi-page documents after a fixed number of pages	✓	✓	✓	✓
Split multi-page documents according to text criteria defined using readout areas (e.g. "Page 1") (additional DocuWare Import and Barcode & Forms licenses needed)	✓	-	+	+
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)	✓	-	+	+
Automatic deletion of separating pages (additional DocuWare Import and Barcode & Forms licenses needed)	✓	-	+	+
Identify and classify document based on file name and/or directory: A specific configuration is always executed if, for example, the file name contains the term "Invoice"	✓	✓	✓	✓
Identify and classify a document based on text content: A specific configuration is always run if, for example, "Invoice" appears in a scanned document at a specific location	✓	✓	✓	✓
Automatically overlay forms and letterheads, e.g. a invoice form – can be done separately for first page and subsequent pages (additional DocuWare Import and Barcode & Forms licenses needed)	✓	-	+	+
Automatic recognition of the document language possible (except for Greek and Cyrillic languages)	✓	✓	✓	✓
Automatic rotation and deskewing of pages that have the wrong orientation or were scanned at an angle	✓	✓	✓	✓

<h2>Import</h2> <p>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</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Automatically attach processed document to a new email, e.g. electronic invoice	✓	✓	✓	✓
Also import metadata (indexing data) of documents when importing from external applications (additional DocuWare Import license needed)	✓	+	+	+
Embed electronic signature in PDF	✓	✓	✓	✓
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)	✓	-	+	+
Automatically recognize and process electronic documents in XML format (with additional DocuWare Import license)	✓	+	+	+
<b>Importing electronic invoices</b>				
Automatically recognize and process electronic invoices in XML format as such; support of electronic invoice formats according to EN 16931 (CII and UBL), e.g. with the XRechnung and Factur X standards, as well as the DIAN, FACTURAE, FatturaPA, KSEF formats (with additional DocuWare Import license)	✓	+	+	+
Write the item data from a supported XML invoice to the index table of the document (additional DocuWare Import license needed)	✓	-	+	+
Automatically recognize electronic invoices in PDF format as such with the German ZUGFeRD standard up to version 2.2 and process them further (additional DocuWare Import license needed)	✓	+	+	+



storageRobot Extended automatic import of files into DocuWare baskets and file cabinets for complex requirements such as (S)FTP sources, UnZIP, database queries, XML or clipping to already archived documents	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Storage targets and general settings</b>				
Store documents in document tray	+	-	+	+
Store documents in file cabinet	+	-	+	+
Store documents in file system	+	-	+	+
Select sample document for indexing configuration from file system	+	-	+	+
Flexible storing options (new, attach, skip if exists)	+	-	+	+
Write entries to external databases, e.g. ERP	+	-	+	+
<b>Sources</b>				
Monitor file system folders for automatic import of files	+	-	+	+
Folder to monitor freely selectable (directory on local PC or server/network)	+	-	+	+
Supports (S)FTP, file system and document tray	+	-	+	+
Unpack ZIP files (file system and FTP)	+	-	+	+
Schedule a check of the import directory or document trays for new files: continuously or at flexibly configurable intervals	+	-	+	+
Check minimum age of files to prevent importing incomplete files	+	-	+	+
<b>Indexing</b>				
Automatic transfer of fixed entries as index words	+	-	+	+
Automatic transfer of dynamic entries as index words, e.g. user, file name, file extension, creation or modification date	+	-	+	+
Use entries from external databases, e.g. from ERP, for indexing during import or to create folder structures	+	-	+	+
When indexing, you can combine fixed entries and dynamic entries with text readout areas in an index field	+	-	+	+
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	+	-	+	+
Split the content of text readout areas to transfer separate parts to different index fields	+	-	+	+
Replace the content of text readout areas with different text, e.g. replace the index word "Invoice" with the expanded term "Invoice – output", you can also do this for individual characters	+	-	+	+
Filter out spaces and zeros from recognized text, e.g. delete spaces from IBAN numbers	+	-	+	+
Switch off text and barcode recognition at import in order to speed up document processing when this function is not required	+	-	+	+

storageRobot Extended automatic import of files into DocuWare baskets and file cabinets for complex requirements such as (S)FTP sources, UnZIP, database queries, XML or clipping to already archived documents	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Barcode processing</b>				
Index document with 1D and 2D barcodes	+	-	+	+
Identify and classify document according to text criteria or barcode; if the barcode is empty, an error is displayed	+	-	+	+
Split the content of barcode readout areas to transfer separate parts to different index fields	+	-	+	+
Select barcode type to be searched for and used for indexing	+	-	+	+
Select line(s) from multi-line barcode to be written to the index field, e.g. to completely transfer invoice contents from barcodes and distribute them to individual fields	+	-	+	+
Split multi-page documents before and after barcodes	+	-	+	+
Split multi-page documents when changing barcodes, e.g. when batch scanning paper documents, each of which has its own barcode	+	-	+	+
<b>Further processing</b>				
Split multi-page documents after a fixed number of pages	+	-	+	+
Split multi-page documents according to text criteria defined using readout areas (e.g. "Page 1")	+	-	+	+
Split multi-page documents after a blank readout area or if the content of the area changes, e.g. no page number	+	-	+	+
Automatic deletion of separating pages	+	-	+	+
Identify the configuration to be used by file name and/or directory, e.g. invoice configuration if the file name contains the term "invoice"	+	-	+	+
Embed information in PDF using DWControl or other unique fonts	+	-	+	+
Automatically overlay forms and letterheads, e.g. an invoice form – can be done separately for first page and subsequent pages (by configuring the XML file)	+	-	+	+
Send notification in case of error	+	-	+	+
Automatic rotation of pages that have the wrong orientation (by configuring the XML file)	+	-	+	+
Check variable values during runtime	+	-	+	+
Supports many different index file formats incl. XML	+	-	+	+
When importing documents from external applications, transfer metadata as index values in DocuWare	+	-	+	+

# Intelligent Indexing (Service)

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

	On Premises			Web Client	Windows Explorer Client	
	DocuWare Cloud	BUSINESS Server	PROFESSIONAL Server			ENTERPRISE Server
<b>Managing Intelligent Indexing</b>						
Classify documents in a document tray and automatically suggest index words based on known documents whose indexing was already "learned"	✓	+	+	+	✓	✓
Identify individual invoice items and transfer them to DocuWare as metadata, e.g. for distributing an invoice amount to different cost centers (split posting)	✓	+	+	+	✓	✓
Auto-fill index tables, e.g. to transfer invoice items to DocuWare. For training purposes, only the first invoice item is transferred with One Click Indexing and the remaining items are filled in with a click, even for multi-page invoices	✓	+	+	+	✓	-
Storing documents evaluated by Intelligent Indexing using the context menu	✓	+	+	+	✓	✓
Color-code documents and individual index words by the level of confidence that the suggested index words are correct	✓	+	+	+	✓	-
"Train" Intelligent Indexing: Correct suggested index words as needed to "teach" the system the indexing pattern so it knows it the next time	✓	+	+	+	✓	✓
The results of Intelligent Indexing can be assessed at a glance in the document tray with index card view	✓	+	+	+	✓	-
Run documents in the document tray through Intelligent Indexing again	✓	+	+	+	✓	-
Document types can be freely named, i.e. company-specific terms are possible	✓	+	+	+	✓	✓
13 standard index fields (including Document type, Date, Company, Contact, Customer number, Payment date, Document number, Amount, VAT ID, Subject) for automatic indexing including continuous learning based on user	✓	+	+	+	✓	✓
31 user-defined index fields, of which: - 14 fields: General text - 2 fields: General text (select only) - 5 fields: General date - 10 fields: General amount	✓	+	+	+	✓	✓
Automatic recognition of the document language in the background	✓	+	+	+	✓	✓
<b>Managing Intelligent Indexing</b>						
Optionally enable and disable Intelligent Indexing for specified organizations (in DocuWare configuration)	✓	+	+	+	✓	-
Reset configurations	✓	+	+	+	✓	-

<b>Intelligent Indexing (local installation)</b> 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	DocuWare Cloud	On Premises			Web Client	Windows Explorer Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server		
<b>Managing Intelligent Indexing</b>						
Classify documents in a document tray and automatically suggest index words based on known documents whose indexing was already "learned"	-	-	+	+	✓	✓
Identify individual invoice items and transfer them to DocuWare as metadata, e.g. for distributing an invoice amount to different cost centers (split posting)	-	-	+	+	✓	✓
Auto-fill index tables, e.g. to transfer invoice items to DocuWare. For training purposes, only the first invoice item is transferred with One Click Indexing and the remaining items are filled in with a click, even for multi-page invoices	-	-	+	+	✓	✓
Storing documents evaluated by Intelligent Indexing using the context menu	-	-	+	+	✓	✓
Color-code documents and individual index words by the level of confidence that the suggested index words are correct	-	-	+	+	✓	-
"Train" Intelligent Indexing: Correct suggested index words as needed to "teach" the system the indexing pattern so it knows it the next time	-	-	+	+	✓	✓
The results of Intelligent Indexing can be assessed at a glance in the document tray with index card view	-	-	+	+	✓	-
Run documents in the document tray through Intelligent Indexing again	-	-	+	+	✓	-
Document types can be freely named, i.e. company-specific terms are possible	-	-	+	+	✓	✓
13 standard index fields (including Document type, Date, Company, Contact, Customer number, Payment date, Document number, Amount, VAT ID, Subject) for automatic indexing including continuous learning based on user	-	-	+	+	✓	✓
31 user-defined index fields, of which: - 14 fields: General text - 2 fields: General text (select only) - 5 fields: General date - 10 fields: General amount	-	-	+	+	✓	✓
Automatic recognition of the document language in the background	-	-	+	+	✓	✓
<b>Managing Intelligent Indexing</b>						
Optionally enable and disable Intelligent Indexing for specified organizations (in DocuWare configuration)	-	-	+	+	✓	-
Reset configurations	-	-	+	+	✓	-

<h2>DocuWare Export</h2> <p>Export index data from documents to enable data transfer to third-party applications. This is particularly useful for integrating DocuWare with ERP and accounting systems. DocuWare Export is a standalone desktop app</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Export index data for transfer to other systems</b>				
Execute scheduled export	✓	-	+	+
Execute ad hoc export	✓	-	+	+
<b>Configure Export (in DocuWare Configuration)</b>				
Meet requirements of leading accounting systems for header, table, footer, and data allocation	✓	-	+	+
Test export without assigning data	✓	-	+	+
Export as a CSV file (possible encoding types: ANSI, ASCII, Big5, Shift JIS, UTF-8, UTF-8 without BOM, UTF-16)	✓	-	+	+
Filter documents from which data is exported	✓	-	+	+
Define index fields whose contents are to be exported	✓	-	+	+
Export data from table fields	✓	-	+	+
For tables, define columns to be exported	✓	-	+	+
Split index field data into columns to export values stored in a field separately, e.g. project number and name; select list with separation patterns facilitates splitting	✓	-	+	+
Transform data, e.g. replace "January" with "01"	✓	-	+	+
Edit index entries after export	✓	-	+	+
Assign authorization for use per function profile	✓	-	+	+

<b>docXporter</b> Automatic export of documents and/or index data from DocuWare file cabinets in various formats to the file system. The configuration is done via an XML file that can be customized to the specific export requirements.	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Export documents and/or index data for transfer to other systems</b>				
Export documents in original format	+	-	+	+
Export PDF documents with/without annotations	+	-	+	+
Export documents as ZIP or single PDFs	+	-	+	+
Export index data in the file formats XML, CSV (UTF-8), INI, TXT, JSON and many more	+	-	+	+
Export documents into index-based folder structure	+	-	+	+
Use index entries as files names	+	-	+	+
Apply stamps when exporting	+	-	+	+
Execute scheduled export	+	-	+	+
Execute ad hoc export	+	-	+	+
<b>Configure docXporter (in XML file)</b>				
Meet requirements of leading accounting systems for header, table, footer, and data allocation	+	-	+	+
Filter documents from which data is exported	+	-	+	+
Filter index fields whose contents are to be exported (by defining the search dialog)	+	-	+	+
Export data from table fields	+	-	+	+
For tables, define columns to be exported (via template)	+	-	+	+
Split index field data into columns to export values stored in a field separately, e.g. project number and name; select list with separation patterns facilitates splitting (via template)	+	-	+	+
Transform data, e.g. replace "January" with "01" (via template)	+	-	+	+
Edit index entries after export	+	-	+	+

Barcode & Forms 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	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Reading Out Text and Overlaying Forms/Letterheads</b>				
<i>The Barcode &amp; 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	✓	-	+	+
When indexing, you can combine fixed entries and dynamic entries with text readout areas in an index field	✓	-	+	+
Replace the content of text readout areas with different text, e.g. replace the index entry "Invoice" with the expanded term "Invoice – output"	✓	-	+	+
Filter out spaces and zeros from recognized text, e.g. delete spaces from IBAN numbers	✓	-	+	+
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"	✓	-	+	+
Automatically overlay forms and letterheads, e.g. a scanned invoice form – can be done separately for first page and subsequent pages	✓	-	+	+
Split multi-page documents according to text criteria defined using readout areas (e.g. "Page 1")	✓	-	+	+
Split multi-page documents after a blank readout area or if the content of the area changes, e.g. no page number	✓	-	+	+
Automatic deletion of separating pages	✓	-	+	+
<b>Reading Out 1D and 2D Barcodes</b>				
Automatic reading of content from defined barcode readout areas of the document. This content is used for indexing	✓	-	+	+
Select barcode type to be searched and used for indexing	✓	-	+	+
Filter barcodes with exact specification of characters	✓	-	+	+
Split the content of barcode readout areas to transfer individual parts to different index fields	✓	-	+	+
Split multi-page documents after barcodes	✓	-	+	+
Define readout areas based on barcodes on the document (set anchors)	✓	-	+	+
Split multi-page documents after a fixed number of pages	✓	-	+	+
Split multi-page documents after a blank readout area or if the content of the area changes	✓	-	+	+
Automatic deletion of separating pages	✓	-	+	+
<b>Supported 1D and 2D Barcodes</b>				
2 of 5 (Interleaved, Datalogic, IATA, Industrial, Inverted, Matrix)	✓	-	+	+
Codabar	✓	-	+	+

<h2>Barcode &amp; Forms</h2> <p>Barcode &amp; 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</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Code 11 (USD 8)	✓	-	+	+
Code 39	✓	-	+	+
Code 93	✓	-	+	+
Code 128 / EAN 128 / GS1-128	✓	-	+	+
EAN 8	✓	-	+	+
EAN 13	✓	-	+	+
MaxiCode	✓	-	+	+
MSI (Modified Plessey)	✓	-	+	+
PharmaCode	✓	-	+	+
Postal (Dutch KIX, Postnet, Australia Post, Royal Mail, Planet, Intelligent Mail)	✓	-	+	+
RSS (RSS 14, RSS 14 Stacked, RSS Expanded, RSS Expanded Stacked)	✓	-	+	+
Telepen	✓	-	+	+
UPC/A	✓	-	+	+
UPC/E	✓	-	+	+
<b>Supported 2D Barcode Types</b>				
Aztec	✓	-	+	+
DataMatrix	✓	-	+	+
MicroQR	✓	-	+	+
PDF417	✓	-	+	+
QR	✓	-	+	+



Forms DocuWare Forms is the tool for effective form management that makes the standardized entry of data quick and convenient. Web Forms remove the need for multiple entries: Once entered, data can be transferred automatically to different Merge Forms. You can even integrate Web Forms into the document workflow with DocuWare.	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Display and call up forms in DocuWare Client	✓	-	+	+
<b>Creating, Managing, and Editing Web Forms with Convenient Form Designer</b>				
Compile elements using drag & drop: Arrange input fields, fixed fields, checkboxes, and radio buttons variably	✓	-	+	+
Adjust the size of image elements and align them	✓	-	+	+
Set background color of the website for the form using color picker or hexadecimal value	✓	-	+	+
Define the display width of the form in the browser	✓	-	+	+
Display in full-screen mode	✓	-	+	+
Overview page with all form configurations; with filter option	✓	-	+	+
Grouped changes of form elements	✓	-	+	+
Design on a grid - adjust the size and position of form fields by drag and drop, put multiple fields in the same row	✓	-	+	+
Field entry masks for single-line form fields: Display of correct input examples	✓	-	+	+
Most important functions also available by right-clicking or hotkeys	✓	-	+	+
Show and hide form fields with logic and set them as active or inactive, editable or read-only	✓	-	+	+
Use form input for numeric fields for calculations; display result directly in form and also use as index value; formula generator supports basic arithmetic operations, parentheses, and fixed values	✓	-	+	+
Perform calculations between numeric columns within a table; sum columns across multiple tables; use numeric fields in the form and fixed values to create a formula	✓	-	+	+
Define select lists for dropdown fields, with filter and auto-filling	✓	-	+	+
Insert tables in web forms, entries can be transferred to index tables	✓	-	+	+
Pre-fill field entries, e.g. with the current date	✓	-	+	+
Store Web Form as PDF in file cabinet	✓	-	+	+
Format fixed texts and add hyperlinks	✓	-	+	+
Designate elements as mandatory fields	✓	-	+	+
Automatic consecutive numbering of forms; number is stored with the form	✓	-	+	+
Preview for checking form in individual browser	✓	-	+	+
Submit a Web Form received via URL link	✓	-	+	+
Map Web Form fields to index entries by chosen store dialog	✓	-	+	+

Forms DocuWare Forms is the tool for effective form management that makes the standardized entry of data quick and convenient. Web Forms remove the need for multiple entries: Once entered, data can be transferred automatically to different Merge Forms. You can even integrate Web Forms into the document workflow with DocuWare.	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Responsive design: Display of the Web Form adapts to smartphone or tablet	✓	-	+	+
Attach files to the Web Form by dragging and dropping when filling out	✓	-	+	+
Assign attachments to individual Merge Forms; files attached to the Web Form are only attached to merge forms they are relevant to	✓	-	+	+
Insert signature field for signing a form using a stylus or finger (on touch devices) or the mouse (on non-touch devices)	✓	-	+	+
Export Web Forms and Merge Forms and import them into another DocuWare system; includes the form fields, the form layout, the files for a Merge Forms, and the Merge Form fields and mapping	✓	-	+	+
Create public form for users that do not have their own DocuWare access	✓	-	+	+
<b>Merge data from Merge Forms with existing paper forms</b>				
Scan in or use a digital version of existing/standardized paper forms to create a Merge Form	✓	-	+	+
Fill areas: Assign Web Form fields to the appropriate space on a Merge Form	✓	-	+	+
Copy, cut, and paste fields into areas that the contents of the Web Form fields are copied to	✓	-	+	+
Position fill areas precisely using arrow keys	✓	-	+	+
Choose how fields will be displayed on Merge Form	✓	-	+	+
One input to multiple outputs: store multiple Merge Forms as separate PDFs from a single Web Form	✓	-	+	+
Easily manage multiple Merge Forms that are linked to a single Web Form	✓	-	+	+
Write protection for forms with Merge Forms	✓	-	+	+
<b>Integrate Web Forms into the Document Workflow</b>				
Form can be displayed immediately after storage as a workflow task in DocuWare (additional Workflow Manager license needed)	✓	-	+	+
Form can be displayed immediately after storage as a Task Manager task in DocuWare (additional Task Manager license needed)	✓	-	+	+
Use the Autoindex Workflow to transfer values at database level to the CRM, for example (additional Autoindex license needed)	✓	-	+	+
Copy individual data from a form in DocuWare Viewer to other applications using copy & paste – to create a CRM entry, for example	✓	-	+	+

Forms	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<p><b>DocuWare Forms is the tool for effective form management that makes the standardized entry of data quick and convenient. Web Forms remove the need for multiple entries: Once entered, data can be transferred automatically to different Merge Forms. You can even integrate Web Forms into the document workflow with DocuWare.</b></p>				
<b>Configuring DocuWare Forms (in DocuWare Configuration)</b>				
Configurations are created and managed centrally and are immediately available on the Client	✓	-	+	+
Copy existing configurations	✓	-	+	+
Enable and disable form	✓	-	+	+
Call up a form directly from the configuration	✓	-	+	+
Create the message that is shown to the user after the form is submitted	✓	-	+	+
Display the link to archived form after form submission	✓	-	+	+
Display the "New form" button after form submission	✓	-	+	+
Automatically forward to a URL after form submission	✓	-	+	+
Automatically forward to a new form after form submission	✓	-	+	+
Automatically forward to an archived form after form submission	✓	-	+	+
Set how many seconds after form submission the automatic action is to be executed	✓	-	+	+
Automatic mapping of form fields to file cabinet fields with identical names for indexing	✓	-	+	+
Check form input via validation service and optionally also compare with external data sources	✓	-	+	+
Validate entries within a form according to specified rules, e.g. if the person filling in the form must be of legal age and enters a younger age	✓	-	+	+
Assign access rights with ease: Assign a configuration directly to individual users or via roles to all users that hold the role	✓	-	+	+
The person who created the configuration automatically receives user and administrator rights	✓	-	+	+

<h2>Workflow Manager</h2> <p>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</p>	DocuWare Cloud	On Premises			Web Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	
<b>Workflow Task Lists in DocuWare</b>					
Practical list that gathers together the tasks to be processed and the documents associated with them, for example incoming invoices	✓	-	+	+	✓
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	✓	-	+	+	✓
Stamps: Define fields from the workflow dialog that are displayed in a stamp	✓	-	+	+	✓
Reassign tasks to other users, roles, or substitution rules, with search function	✓	-	+	+	✓
Mark tasks "read" or "unread"	✓	-	+	+	✓
Confirm, reassign, or stop multiple tasks simultaneously	✓	-	+	+	✓
Filter tasks, for example by date period, due date, customer name or number	✓	-	+	+	✓
Specify "out of office" status directly in DocuWare so that tasks will be forwarded to substitute	✓	-	+	+	✓
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	✓	-	+	+	✓
List structuring: Individual design of task lists enables optimum clarity	✓	-	+	+	✓
Export workflow history as a CSV file	✓	-	+	+	✓
Display workflow history from result list, list, folder view, and viewer – of the document that was or is part of a workflow; automatic activities can be displayed	✓	-	+	+	✓
Display document history from the task list	✓	-	+	+	✓
One-click indexing for working with workflow forms	✓	-	+	+	✓
Get and send task list links					
Integrate a task list into any application with a URL	✓	-	+	+	✓
Export task list as CSV file					
Change index entries of a document in the current workflow	✓	-	+	+	✓
Send a request for a document as a one-step task – directly from the result list, list, and folder view of a search or from the viewer	✓	-	+	+	✓
For inquiries in DocuWare Client, display addressees' out of office directly	✓	-	+	+	✓
<b>Design Workflows and Define Tasks with Workflow Designer</b>					
General settings and views for workflows					
Flow diagram layer for each individual workflow	✓	-	+	+	

<h2>Workflow Manager</h2> <p>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</p>	DocuWare Cloud	On Premises			Web Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	
Export workflow and import it into another file cabinet, whether as a new workflow or as a new version; the selected file cabinet can belong to your organization or be in another system	✓	-	+	+	
Add workflow activities (tasks, decisions, etc.) into a flow diagram using drag & drop	✓	-	+	+	
Set colors for workflow steps (outputs) in a flow diagram	✓	-	+	+	
Specify a calendar with work times for the organization (in DocuWare Administration)	✓	-	+	+	
Define substitution rules in case one or more people responsible are out of office (in DocuWare Administration)	✓	-	+	+	
Display active instances of a workflow in a separate list: Shows which activity is currently being processed	✓	-	+	+	
Specify validation of tasks to check inputs	✓	-	+	+	✓
Automatically validate all dependencies and resources in the workflow as soon as it is opened	✓	-	+	+	
Overview table of all workflows specifying assigned archive, creation data, versions, active instances of every workflow, and other information	✓	-	+	+	
Filter workflow overview by search	✓	-	+	+	
Open workflow version in read mode, e.g. to see how the process was structured in the past	✓	-	+	+	
Copy workflow version and generate new version, to change its functionality, for example	✓	-	+	+	
Show workflow versions in separate list	✓	-	+	+	
<b>Specify workflow tasks</b>					
Define tasks and parallel tasks	✓	-	+	+	
Assign tasks and parallel tasks to users, roles, or substitution rules	✓	-	+	+	
Determine decision-making options that should be available to the person responsible during a task, e.g. approving or rejecting an invoice; incl. option to change the order of the decisions afterwards	✓	-	+	+	
Use index tables, e.g. to distribute an invoice amount to several cost centers in a task; the index tables themselves can be set up in the file cabinet configuration	✓	-	+	+	
Pre-fill index tables, e.g. with the remaining amount of an invoice whose items are to be released distributed over several cost centers	✓	-	+	+	
Pre-fill entire tables with table contents from documents that have already been stored, e.g. for recurrent invoicing	✓	-	+	+	
Pre-fill entire tables in the dialog with table contents from documents that have already been stored, e.g. for recurrent invoicing	✓	-	+	+	
Pre-fill individual columns of a table	✓	-	+	+	

<h2>Workflow Manager</h2> <p>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</p>	DocuWare Cloud	On Premises			Web Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	
Sort and show/hide table columns	✓	-	+	+	
Exclude editing of index tables completely setting them to read-only	✓	-	+	+	
Define decision as default decision so that the user does not have to choose a new decision each time	✓	-	+	+	
Assemble form into which the responsible person should enter data (field, field name, field mask, pre-filled with, select list, variable); incl. option to change the order of form fields later	✓	-	+	+	
Add a task description and/or a link e.g. to a third-party program to a form	✓	-	+	+	
Set up form fields with pure read authorizations, e.g. if an already released amount should be shown when editing an invoice	✓	-	+	+	
Automatically fill empty PDF form fields during workflow (with DocuWare Forms additional license)	✓	-	+	+	
Inform employees via email notification that a new task has been assigned to them	✓	-	+	+	
Remind employees via email notification that a task is due or overdue	✓	-	+	+	
Send employees information about the achievement of project milestones via email from workflow	✓	-	+	+	
Attach document to email notification: in the original format (default) or as a PDF with or without annotations, e.g. for employees with no access to the DocuWare file cabinet; you can send them as one ZIP document or as individual files (default)	✓	-	+	+	
Send email notification in CC to additional recipients; including to multiple addressees simultaneously	✓	-	+	+	
Opening tasks from the email notification	✓	-	+	+	
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	✓	-	+	+	
Filter select lists for workflow dialogs so that only relevant entries are displayed for the tasks	✓	-	+	+	
Define conditional commands, such as if invoices above a certain amount need to be approved by a second party	✓	-	+	+	
<b>Edit and manage workflows</b>					
Publish workflow, providing it to the authorized users, roles, or substitution rules	✓	-	+	+	
Remove publication of a workflow	✓	-	+	+	
Define time-based escalations for tasks: 1. Period to remind those responsible, 2. Overdue period for task	✓	-	+	+	

<h2>Workflow Manager</h2> <p>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</p>	DocuWare Cloud	On Premises			Web Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	
Automatic forwarding of tasks if the time limit is exceeded (timeout)	✓	-	+	+	
Set as trigger for starting a workflow (instance): Storing a new document and changing index values for an already archived document; can also be limited to documents created with form templates (merge forms) in DocuWare Forms	✓	-	+	+	
Set as trigger for starting a workflow (instance): Schedule or fixed date plus changes to index values for a document that has already been archived	✓	-	+	+	
Create, edit, copy, and save workflow configuration	✓	-	+	+	
Clear assignment: Workflow configuration must be assigned to a DocuWare file cabinet	✓	-	+	+	
Simulate workflow with the option to change variables	✓	-	+	+	
Have the workflow wait for an event, for example, if the workflow for incoming invoices is not to continue until the delivery note associated with the invoice has been stored	✓	-	+	+	
Delay a workflow, for example, to wait for a response from an external system or to run a web service again in a time loop	✓	-	+	+	
Stop running workflow instance, e.g. for test purposes	✓	-	+	+	
Completely delete workflow from system	✓	-	+	+	
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 and overview of the underlying functions of the result list	✓	-	+	+	
Assign permissions to users as controller and designer	✓	-	+	+	
Assign permissions to roles as designer	✓	-	+	+	
<b>Flexible control of workflows with index data and variables</b>					
Define and edit variables for workflows	✓	-	+	+	
Variables and list variables for users, roles, substitution rules	✓	-	+	+	
Use variables when prefilling forms and reminder date	✓	-	+	+	
Use variables for error tracking	✓	-	+	+	
Use variables to delay workflows, for example, to wait for a response from an external system or to run a web service again in a time loop	✓	-	+	+	
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	✓	-	+	+	
Automatically write data to index fields of any document, e.g. in the case of incoming invoices, save the invoice status in the index data as well	✓	-	+	+	
Overwrite keyword fields when assigning data	✓	-	+	+	



<h2>Workflow Manager</h2> <p>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</p>	DocuWare Cloud	On Premises			Web Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	
Assign data from external sources so that calculations can be run automatically, e.g. transfer information from the accounting system into a workflow	-	-	+	+	
Assign data from an external source straight to a variable	-	-	+	+	
Assign data from file cabinets (tables) to the index table of a document	✓	-	+	+	
Assign data from up to 20 other documents to the index table of a document	✓	-	+	+	
Match and assign data in index tables, e.g. automatically retrieve article description and unit price from the material master or price list by using the article ID as the match code	✓	-	+	+	
Extract data from SQL database servers that have been released via the Local Data Connector (default max. 1000 entries per query)	✓	-	-	-	
Access web services (REST, SOAP) to read external data via HTTPS (including nested data structures), e.g. set a qualified electronic signature or read customer data from CRM; this way, several parameters can be transferred or retrieved at once (demo example for web service with publication instructions available)	✓	-	+	+	
<b>Substitution Rules, Out of Office, and Other Settings</b>					
<i>See chapter "DocuWare Administration"</i>					



<h2>Workflow User</h2> <p>With this user license, you can cost-effectively implement company-wide workflows in DocuWare Cloud. For example, you can implement digital personnel files for all employees or include departments that do not work with DocuWare in invoice approval via workflow. The license is available in addition to the cloud packages "DocuWare Cloud 15", "DocuWare Cloud 40" and "DocuWare Cloud 100."</p>	DocuWare Cloud
<b>Workflow Tasks</b>	
Edit tasks via workflow form or workflow stamp	+
Show workflow history	+
Send request	+
<b>File Cabinet Access</b>	
Search for archived documents and display them in the Viewer or original program	+
Show index entries	+
Export documents: download, print, send as email	+
Show document history	+
Retrieve link to document	+
Work with result lists: send as email, export as request, retrieve link to result list, export as CSV file	+
Save search as list	+
<b>Forms (DocuWare Forms)</b>	
Fill in the form and send it	+

<h2>Web Client ReadOnly</h2> <p>Give an unlimited number of DocuWare users read-only access to the Web Client. This is a separate web application coming with an adapted feature set. Currently, the Web Client ReadOnly application is only available for DocuWare On-Premises installations.</p>	On Premises		
	BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Available Web Client tabs</b>			
Search, lists and folders	+	+	+
<b>Web Client menu</b>			
Profile and settings	+	+	+
Touch mode	+	+	+
<b>Document functions</b>			
Search documents	+	+	+
Display documents	+	+	+
Show index entries	+	+	+
Download documents	+	+	+
Send documents as email attachments	+	+	+
Export documents	+	+	+
Print documents	+	+	+
Show document history	+	+	+
Get document link	+	+	+
<b>Result list functions</b>			
Save search as list	+	+	+
Get result list link	+	+	+
Send result list by email	+	+	+
Export result list as CSV file	+	+	+
Export result list as DocuWare Request	+	+	+

<h2>DocuWare Signature Service</h2> <p>Signature Service helps you ensure that your documents are signed with an electronic signature in a workflow with a signature service provider. The signature certificates need to be purchased additionally. DocuWare currently works with Validated ID and DocuSign. To use Signature Service, you need an additional Client license so that the service can log in to DocuWare. The signing processes differ primarily in the authentication method. Electronic signatures with both Advanced Electronic Signature (AES) and Qualified Electronic Signature (QES) levels are possible.</p>	DocuWare Cloud	On Premises*		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Sign documents with Validated ID</b>				
Biometric signature: a customer signs on a supported tablet. Biometric data such as writing pressure and writing speed are recorded and embedded in the document with the signature (AES)	✓	-	+	+
Remote signature: when a document is sent to Validated ID for signature, the recipient receives a message and releases the signature, for example, from a smartphone using an SMS code (AES) as specified by eIDAS	✓	-	+	+
Centralized signature: the user can sign documents from anywhere and at any time with Validated ID (AES)	✓	-	+	+
Centralized signature: the user deposits a certificate with Validated ID that confirms their identity. The user can authenticate with ValidatedID and sign documents from anywhere and at any time (QES)	✓	-	+	+
Set company stamp, also called electronic seal (AES / QES)	✓	-	+	+
Sign document in multiple places, e.g. on multiple pages	✓	-	+	+
Clip multiple files to one document and sign them as sections at an affordable cost	✓	-	+	+
Set deadline for signing	✓	-	+	+
Send reminder emails automatically	✓	-	+	+
Automatically send signer copy of signed document as email attachment	✓	-	+	+
<b>Signing Documents with DocuSign</b>				
<i>DocuSign sends an email containing a link to the document. Clicking on the link opens the document on the DocuSign website, where the user can view and sign it after authentication. You specify the type of the authentication when setting up the workflow</i>				
Signature without authentication (AES)	✓	-	+	+
Signature with authentication by SMS (AES)	✓	-	+	+
Signature with authentication by phone call (AES)	✓	-	+	+
Signature with authentication by access code (AES)	✓	-	+	+
Signature with knowledge-based authentication, USA only (AES)	✓	-	+	+
Sign document in multiple places, e.g. on multiple pages	✓	-	+	+

# DocuWare Signature Service

Signature Service helps you ensure that your documents are signed with an electronic signature in a workflow with a signature service provider. The signature certificates need to be purchased additionally. DocuWare currently works with Validated ID and DocuSign. To use Signature Service, you need an additional Client license so that the service can log in to DocuWare. The signing processes differ primarily in the authentication method. Electronic signatures with both Advanced Electronic Signature (AES) and Qualified Electronic Signature (QES) levels are possible.

	DocuWare Cloud	On Premises*		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Clip multiple files to one document and sign them as sections at an affordable cost	✓	-	+	+
Set deadline for signing	✓	-	+	+
Send reminder emails automatically	✓	-	+	+
Automatically send signer copy of signed document as email attachment	✓	-	+	+

\* For on-premises systems you also need the Workflow Manager license and a valid maintenance and support contract.

<h1>Task Manager</h1> <p>Lists in Web Client and automatic email notifications ensure an optimum workflow</p>	DocuWare Cloud	On Premises			Web Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	
<b>Task Lists in Web Client</b>					
Practical lists that gather together the documents to be processed	✓	-	+	+	✓
Automatic updating of lists	✓	-	+	+	✓
Link to a list can be saved in the browser or on the desktop	✓	-	+	+	✓
<b>Configure lists</b>					
Define lists based on index entries and assign them to users	✓	-	+	+	-
Define lists based on index entries via free SQL query and assign them to users	-	-	+	+	-
Save searches individually as lists	✓	-	+	+	✓
<b>Automatic Email Notification</b>					
Receive an email notification as soon as a new document is available for processing	✓	-	+	+	
The email notification contains links to the documents to be processed or to a list	✓	-	+	+	
Any number of templates can be created for email notifications	✓	-	+	+	
Scheduling: set email notifications to be submitted once a day or during a certain period	✓	-	+	+	
<b>Configuration: Email Notifications</b>					
Create email notifications and assign to individual users	✓	-	+	+	
Create email notifications and release for subscription	✓	-	+	+	
Define the trigger for email notifications using the content of the DocuWare index fields	✓	-	+	+	
Email notifications can be set up for newly archived documents, for documents with modified indexed words or for both options simultaneously	✓	-	+	+	
Define the subject and text content of the email notification	✓	-	+	+	
Define the scheduling for email notifications	✓	-	+	+	

<b>Autoindex</b> Autoindex synchronizes data between DocuWare and external data sources: Index data from DocuWare is transferred to CRM, for example, or data from there is used as index values in DocuWare. Data synchronization between different DocuWare file cabinets is also possible.	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Index Enhancement via Data Sources</b>				
DocuWare Cloud: Possible data sources: DocuWare file cabinet (apart from index tables) or database table from your own DocuWare Cloud system; external, locally installed database tables (default 1000 entries per query via Local Database Connector)	✓			
DocuWare On-premises: Possible data sources: DocuWare file cabinet (including index tables) and database table from own DocuWare On-premises system, database view, SQL command		-	+	+
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	✓	-	+	+
<b>Index Enhancement via Records</b>				
Select whether to find external records associated with DocuWare documents, or DocuWare documents associated with external records	✓	-	+	+
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)	✓	-	+	+
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	✓	-	+	+
Delete external records after processing. This ensures that an external record is only used once	✓	-	+	+
DocuWare On Premises: Create an external record if no external record can be found for a document (not supported for table views)	-	-	+	+
DocuWare Cloud: Create an external record (through Local Database Connector) if no external data record could be found for a document	✓			
Create a record in DocuWare if no document can be found for an external record	✓	-	+	+
Filter on documents in the DocuWare file cabinet	✓	-	+	+
Filter on records in the external data source	✓	-	+	+
<b>Index Extension via Fields of External Databases</b>				
Assign external field entries from external databases to DocuWare index fields	✓	-	+	+
<b>Index Enhancement Settings</b>				
Add index words always or only when fields are empty	✓	-	+	+
Add index words from contents of external record, using fixed or dynamic entries	✓	-	+	+

<b>Autoindex</b> Autoindex synchronizes data between DocuWare and external data sources: Index data from DocuWare is transferred to CRM, for example, or data from there is used as index values in DocuWare. Data synchronization between different DocuWare file cabinets is also possible.	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Add or change field contents of the external record using index words of the DocuWare document using fixed or dynamic entries	✓	-	+	+
Special indexation of documents without associated external record (only possible with ODBC driver; not possible for views in databases)	✓	-	+	+
Monitor and automatically change or remove index entries (no second data source required)	✓	-	+	+
<b>Control</b>				
Start Autoindex jobs manually, according to schedule (minimum interval Cloud: 60 min., on premises: 1 min.), when filing a new document, changing a stored document, or via indexing file (e.g. CRM); in on-premises systems, contents of database connections can be additionally filtered via SQL	✓	-	+	+
<b>Configuring Autoindex</b>				
Create and edit configurations in DocuWare Configuration	✓	-	+	+

Smart Connect You can use Smart Connect to connect to almost any program you like with the DocuWare document pool without any programming	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>DocuWare Integration Without Programming</b>				
Transfer of index words from any areas (including tables) of the third-party application	✓	+	+	+
Show one or more buttons for searching in DocuWare in third-party applications	✓	+	+	+
"Smart Index" menu entry in the DocuWare store or info dialog. This allows index information to be adopted from an external program	✓	+	+	+
Can be used in multi-user environments, e.g. a terminal server environment	✓	+	+	+
<b>Highlight Search: Finding Documents Directly from Third-Party Applications with Keyboard Shortcuts</b>				
Search and retrieve documents in the DocuWare file cabinet using a simple keyboard shortcut—with a single, quickly created configuration for all third-party programs; occurrences of the search term are highlighted when the document is displayed in the Viewer	✓	+	+	+
<b>Smart Search: Search from third-party applications for archived documents</b>				
Run a configured search using an integrated DocuWare button, a keyboard shortcut, or the DocuWare Desktop Apps tray menu	✓	+	+	+
Option to use additional pre-defined index words	✓	+	+	+
Fixed entries, dynamic entries, and text readout areas can be combined during the search	✓	+	+	+
Use place holders when entering a search term	✓	+	+	+
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	✓	+	+	+
<b>Smart Index: Use terms from third-party application as index words for document archiving</b>				
Run Smart Index via an entry that appears in the DocuWare store or info dialog	✓	+	+	+
Option to use additional pre-defined index words	✓	+	+	+
When indexing, you can combine fixed entries, dynamic entries, and text readout areas in an index field	✓	+	+	+
Index during document archiving or as post-indexing of documents already archived	✓	+	+	+
<b>Configuring Smart Connect (in DocuWare Configuration)</b>				
Create, edit, copy, and delete Smart Connect configurations	✓	+	+	+
Limit the identification of the external application, e.g. by "begins with" or "contains"	✓	+	+	+
Use selected text when extracting content from any area	✓	+	+	+
Adapt readout text, e.g. drop leading zeros from invoice numbers	✓	+	+	+



<h2>Smart Connect</h2> <p>You can use Smart Connect to connect to almost any program you like with the DocuWare document pool without any programming</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Use place holders in a search	✓	+	+	+
Limit the search in the keyword field by, e.g. by "begins with" or "contains"	✓	+	+	+
Automatic recognition of the text language possible (except for Greek and Cyrillic languages)	✓	+	+	+
Automatic selection of the optimum recognition technology for reading out text	✓	+	+	+

<h2>Windows Explorer Client</h2> <p>DocuWare Windows Explorer Client allows all DocuWare file cabinets to be integrated into the Windows file directory</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Intuitive Working with Windows Explorer</b>				
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	✓	✓	✓	✓
Archive complete folder structures from the file system, documents are archived in DocuWare with the relevant index words	✓	✓	✓	✓
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	✓	✓	✓	✓
Create new folders and save documents by dragging and dropping them there	✓	✓	✓	✓
Display of all logged-in user's DocuWare document trays in the tree view; sequence can be adjusted	✓	✓	✓	✓
Display and change index entries for documents directly in Windows Explorer	✓	✓	✓	✓
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 (except Greek and Cyrillic languages) possible	✓	✓	✓	✓
Create links to archived documents and/or DocuWare folders (e.g. on the desktop or within an application, such as PowerPoint)	✓	✓	✓	✓
Access an archived document from an application in read-only mode via "Open"	✓	✓	✓	✓
Edit archived documents (in the application stored in Windows Explorer for that file extension)	✓	✓	✓	✓
Open a document from Windows Explorer Client in DocuWare Viewer	✓	✓	✓	✓
Open documents using the "Open with" command in the context menu in the desired program	✓	✓	✓	✓
Print documents from context menu on default printer	✓	✓	✓	✓
Copy document link to the clipboard	✓	✓	✓	✓
Send link to document from Windows Explorer Client	✓	✓	✓	✓
Display archived documents in read-only mode in the application stored in Windows Explorer for that file extension	✓	✓	✓	✓
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)	✓	✓	✓	✓
Display the version history of a document	✓	✓	✓	✓

Request Request makes complete file cabinets or selected documents available on external media as a ZIP file. Documents can be read without a DocuWare Web Client. Use of DocuWare Request may be linked to additional costs for DocuWare Cloud	DocuWare Cloud	On Premises			Web Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server	
<b>Portable File Cabinets: Use DocuWare as a ZIP File on CD/DVD, External Hard Disk, or USB Stick</b>					
Search for documents via index words as in DocuWare (also fulltext search) - including document content and index fields	✓	✓	✓	✓	
Open documents in standard viewers; PDF viewer available within Request in case no PDF viewer is installed on the respective device	✓	✓	✓	✓	
Transfer and display the document versions for file cabinets that have version management enabled	✓	✓	✓	✓	
Display workflow history for documents that were or are part of a workflow (only in combination with Workflow Manager)	✓	✓	✓	✓	
<b>Configuring DocuWare Request (in DocuWare Configuration)</b>					
Open Request configurations from DocuWare and from DocuWare Configuration	✓	✓	✓	✓	✓
Fine filter function for defining documents that are to be transferred; filter for example by document type, period or company	✓	✓	✓	✓	✓
Include workflow history for a document (Workflow Manager license needed)	✓	✓	✓	✓	
Export documents in original formats or converted into PDF, optionally with comments retained	✓	✓	✓	✓	
Transfer the fulltext catalog (fulltext search)	✓	✓	✓	✓	
Search fields based on assigned result or task list	✓	✓	✓	✓	
Scheduling of provision of data, e.g. making a Request file cabinet available on the first of each month	✓	✓	✓	✓	
Prepare exported request file cabinet for electronic signing, for example to prove the integrity of the data to the tax authorities	✓	✓	✓	✓	
<b>Configuring a Request Import</b>					
Import documents from a request file cabinet into an existing DocuWare file cabinet, provided that documents were exported in the original format (DocuWare Cloud: available with support)	✓	✓	✓	✓	
Following successful import into a DocuWare file, automatic deletion of the Request file cabinet from the storage location is possible	✓	✓	✓	✓	

\* For DocuWare Cloud, each Request export is limited to 10 GB document memory and a maximum of 50,000 documents.

<h1>PaperScan</h1> <p>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</p>	iPhone	Android-Geräte*
<b>Scanning and Storing Documents</b>		
Scan documents	✓	✓
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)	✓	✓
Automatically align document edges	✓	✓
Automatically cut out scan background	✓	✓
Manually crop scans	✓	✓
Rotate scans	✓	✓
Convert color scans to grayscale	✓	✓
Scroll through documents	✓	✓
Add scan to an existing document	✓	✓
Change document name	✓	✓
Store documents in document tray (additional DocuWare Mobile license needed)	✓	✓
Store documents in Dropbox	✓	✓
Upload documents to Google Drive	✓	✓
Print documents with AirPrint	✓	
Generate multi-page PDFs	✓	✓
Delete individual pages of documents	✓	✓
Send documents by email	✓	✓
Store documents in a document tray (with additional DocuWare Mobile license and PROFESSIONAL or ENTERPRISE Server version; the function is included in a DocuWare Cloud license).	✓	✓
Connect PaperScan App easily to DocuWare via QR code	✓	✓

\*Find information about tested Android devices on <https://start.docuware.com/mobile-applications>

DocuWare Administration – Setting Up and Managing the System	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Flexible Authentication</b>				
User authorization via Desktop Apps connection	✓	✓	✓	✓
User authorization via single sign-on	✓	✓	✓	✓
<b>Scalability</b>				
Distribution of server roles (front end, back end) on different machines		✓	✓	✓
Select databases suitable for the system size: MySQL or Microsoft SQL		✓	✓	✓
Use of the same server role on multiple machines (load balancing)		-	+	✓
Client capability: multiple organizations possible per system		-	-	✓
<b>System Administration</b>				
Set up and configure system-wide storage locations for centralized management of data and documents, regardless of the physical medium		✓	✓	✓
Set up and configure system-wide data and database connections for centralized administration of data and documents, regardless of the physical medium		✓	✓	✓
<b>Organization Administration</b>				
Organization of storage into logical disks, user-defined capacity restrictions	-	-	✓	✓
Overview of logged-in users and licenses in use in the relevant DocuWare organization	✓	✓	✓	✓
Back up and restore the settings, e.g. file cabinet settings, users, permissions, and workflow configurations	-	✓	✓	✓
<b>Rights Administration</b>				
Assign rights to users for editing configurations	-	✓	✓	✓
Functional rights: access to individual functions, stamps, and configurations	-	✓	✓	✓
Function profiles: grouping of functional rights	-	✓	✓	✓
Roles: combination of function profiles and file cabinet profiles according to task	-	✓	✓	✓
Predefined role of organization administrator	✓	✓	✓	✓
Predefined role of system administrator	-	✓	✓	✓
System administrator can specify whether-free SQL commands are allowed in the organization	-	✓	✓	✓
<b>User Administration</b>				
Setup of users, groups, roles, and function profiles	-	✓	✓	✓
Grouping of users into groups	-	✓	✓	✓
Assignment of roles to groups	-	✓	✓	✓

DocuWare Administration – Setting Up and Managing the System	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
Direct assignment of functional rights, functional profiles, and roles to individual users	-	✓	✓	✓
Set up default document tray for user	-	✓	✓	✓
Unlock user account	-	✓	✓	✓
Disable the time limits for individual users' passwords	-	✓	✓	✓
Specify users as out of office	-	✓	✓	✓
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	-	-	✓	✓
Create substitution rules: Assign users	✓	✓	✓	✓
Create substitution lists: Compile substitution rules in lists	✓	✓	✓	✓
<b>Logging</b>				
Debug Logging for technical issues in DocuWare system (button in service control)		✓	✓	✓

*For DocuWare Cloud, some of the listed management features are not relevant.*

<h2>URL Integration</h2> <p>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</p>	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>Configuring URL Integration</b>				
URL definition based on specific, predefined parameters	✓	✓	✓	✓
Define complex, valid URLs with the aid of encoding (Base64url Encoding)	✓	✓	✓	✓
Integrate individual elements of DocuWare in a separate browser window or in a defined frame	✓	✓	✓	✓
Call up user interfaces of a DocuWare configuration in web or Windows applications; possible user interfaces: selected search dialog, store dialog, result list, index dialog, Viewer, document trays, workflow task list, workflow task, send request, sent requests, task manager list, version overview, special document	✓	✓	✓	✓
Transfer of any predefined search criteria via URL; occurrences of the search term are highlighted when the document is displayed in the Viewer	✓	✓	✓	✓
Login with transfer of user name and password in encrypted form (passphrase)	✓	-	✓	✓
Login with encrypted parameter in login token	✓	✓	✓	✓
User authorization via single sign-on	✓	✓	✓	✓
Perform single sign-on automatically (skip manual login if possible)	✓	✓	✓	✓
Encryption of the entire URL with passphrase with optional noise for maximum security	✓	✓	✓	✓

Software Developer Kit (SDK) With its Software Developer Kit (SDK), DocuWare provides a central programming interface, as well as the option of user-specific validation. In addition, it allows integration into other programs using the URL integration (see separate chapter).	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
<b>DocuWare Platform Service</b>				
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: <a href="https://start.docuware.com/software-development-kit">https://start.docuware.com/software-development-kit</a>	✓	✓	✓	✓
<b>Custom Validation</b>				
Index data validation via web service: Ensure the plausibility of index entries and spellings via REST-API by comparing field entries with e.g. CRM data and/or your own data source, for example to prevent duplicate storage of documents <a href="http://go.docuware.com/ValidationWebhookSample">http://go.docuware.com/ValidationWebhookSample</a>	✓	✓	✓	✓
<b>Restoring index entries</b>				
Console application for restoring index entries	-	✓	✓	✓
<b>Migration</b>				
Console application for migrating file cabinet data	-	✓	✓	✓



DocuWare iPaaS connectors	DocuWare Cloud	On Premises		
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server
DocuWare has developed its own connectors specifically for the integration of cloud applications. More than 1500 connectors to other cloud applications are available on the Power Automate and Make platforms, allowing you to connect without individual interface programming. No additional license is required on the DocuWare Cloud side, only a client license for logging the connector into DocuWare. Please refer to the websites of the respective iPaaS providers for information on fees and licenses.				
Download documents and files, e.g. to synchronize company master data from CRM with DocuWare	✓	-	-	-
Delete documents and files	✓	-	-	-
Store documents and files, e.g. invoices that are automatically created in PDF format by ERP software and sent to customers by mail, transfer them to DocuWare in the same step for legally compliant archiving, while automatically linking them to the relevant process in the ERP system	✓	-	-	-
Transfer data, e.g. application data entered and archived in a DocuWare form, to the ERP for further processing	✓	-	-	-
Attach files to stored documents	✓	-	-	-
Use automatic archive notifications via webhooks, for example to synchronize the dataset or trigger workflows	✓	-	-	-
Set stamps	✓	-	-	-
<b>Make</b>				
Download documents and files, e.g. to synchronize company master data from CRM with DocuWare	✓	-	-	-
Delete documents and files	✓	-	-	-
Store documents and files, e.g. invoices that are automatically created in PDF format by ERP software and sent to customers by mail, transfer them to DocuWare in the same step for legally compliant archiving, while automatically linking them to the relevant process in the ERP system	✓	-	-	-
Transfer data, e.g. application data entered and archived in a DocuWare form, to the ERP for further processing	✓	-	-	-
Attach files to stored documents	✓	-	-	-
Use automatic archive notifications via webhooks, for example to synchronize the dataset or trigger workflows	✓	-	-	-
Set stamps	✓	-	-	-

## Connect to SAP, Version 2

The module extends SAP with functionalities for archiving documents and data, and uses DocuWare interfaces. It works with extension modules developed by Varelmann Beratungsgesellschaft mbH.

Connect to SAP, Version 2 The module extends SAP with functionalities for archiving documents and data, and uses DocuWare interfaces. It works with extension modules developed by Varelmann Beratungsgesellschaft mbH.	DocuWare Cloud (Cloud Base excluded)	On Premises			Web Client	Windows Explorer Client
		BUSINESS Server	PROFESSIONAL Server	ENTERPRISE Server		
<b>Audit-Compliant Archiving of SAP Documents</b>						
Support for SAP barcode standard scenarios for incoming documents	+	-	+	+		
Integration of archived documents in SAP Business Workflow scenarios	+	-	+	+		
Store and display print lists	+	-	+	+		
Store and display archive files from SAP data archiving	+	-	+	+		
Transfer documents from SAP	+	-	+	+		
Access to SAP documents even without SAP	+	-	+	+	✓	✓
Full functionality from ArchiveLink version 4.7	+	-	+	+		
Data migration from DocuWare Connect to SAP to Connect to SAP, Version 2, up to DocuWare Version 6.12 is possible (with the support of DocuWare Professional Services)	+	-	+	+		