



# The DocuWare Platform

Content services for document management  
and workflow automation

[docuware.com](https://docuware.com)

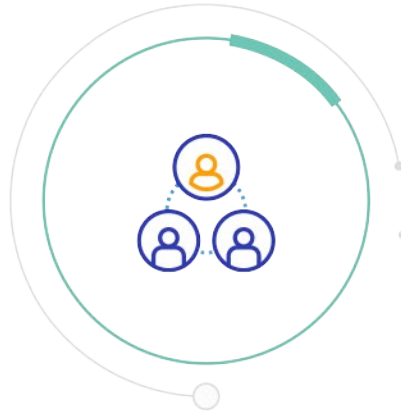




### Everything you need for successful office automation

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

Boost your company's productivity and make every day work easier for your teams. Get started with DocuWare and see for yourself.



A comprehensive range of functions and excellent user comfort



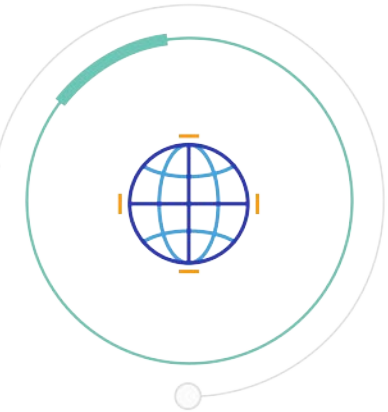
Maximum stability and performance with low maintenance requirements



Available as a cloud, on-premises or hybrid solution



Multiple awards and certifications



Used by more than 12,000 companies in 90 countries

**DocuWare leads the way**

### The DocuWare Client in overview

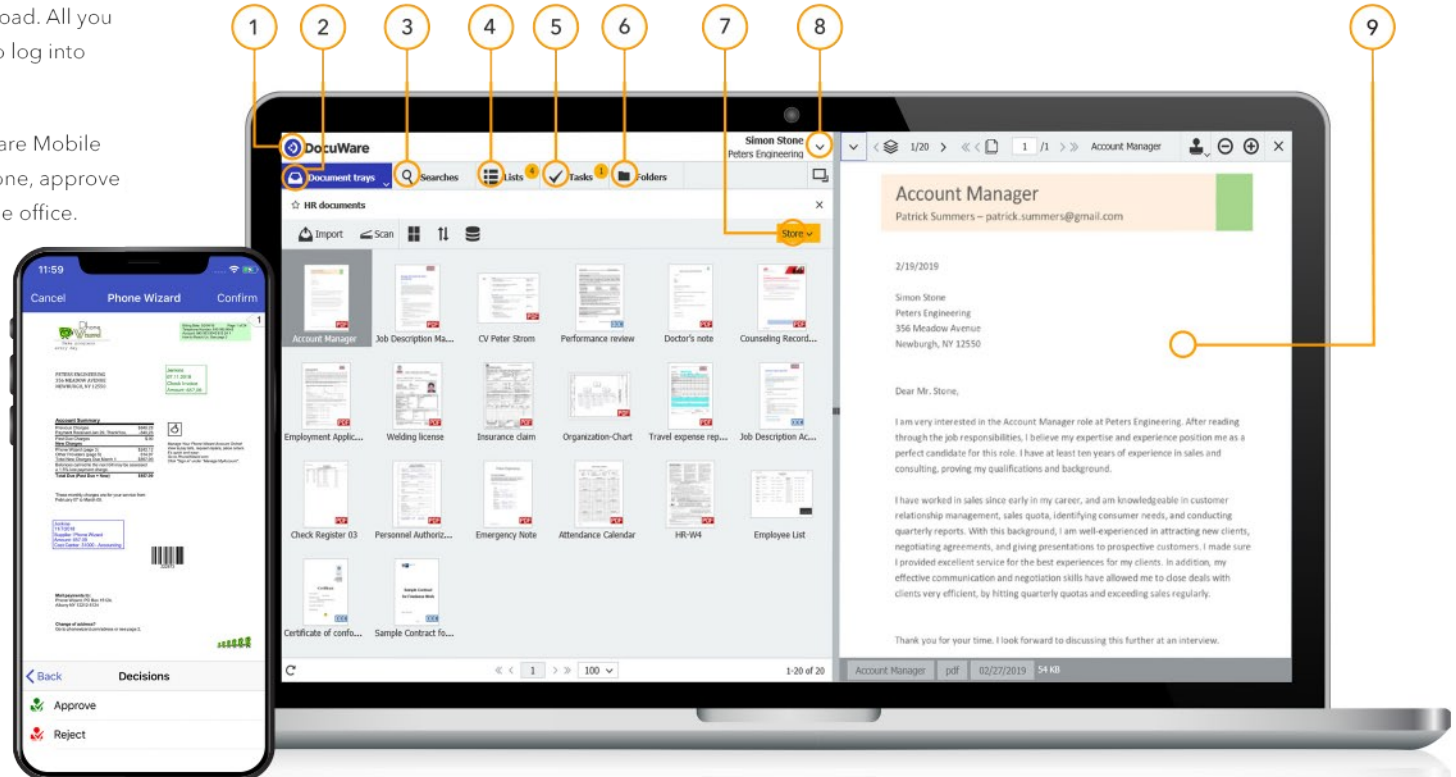
The DocuWare Client is where you will complete most of your document-related work. Switch between your work areas to archive, find and edit documents. Numerous functions and automated processes help you perform all your tasks quickly and in a structured way. You can also open the configuration manager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

### Independent, mobile working

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

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

1. Open DocuWare in your browser
2. Capture and pre-sort documents
3. Find information quickly
4. Organize daily office tasks
5. Perform workflow tasks and collaborate productively
6. Use folder structures for projects
7. Index and securely archive documents
8. Menu to adapt and extend functions
9. View, edit, annotate and share documents



## Features and capabilities

### Collect and organize information

File cabinets as a central information platform .....	06
User-specific dialogs for storing, searching and results .....	06
Document capture from all sources .....	06
Indexing without manual data entry .....	07
Connection to your email client .....	08
Web forms for data capture .....	09

### Access, display and edit content

Flexible search .....	11
Folder view .....	11
Search from other programs .....	12
Display .....	12
Editing .....	12
Share information .....	12
Standalone archive .....	12

### Process documents and control workflows

Task Management with Lists .....	14
Workflow Manager for complex processes .....	14

## DocuWare within your IT ecosystem

### Integrate with SAP, SharePoint, Outlook and hundreds of other applications

Data exchange in any direction .....	17
User interface screening .....	17
URL integration .....	17
Platform Service .....	17
Connect-to modules .....	17

### Highest security standards

Access rights .....	19
Secure from loss .....	19
Business continuity .....	19
Traceability and data protection .....	19

### Flexible deployment options

DocuWare Cloud .....	21
Preconfigured cloud solutions .....	21
DocuWare as an on-premises solution .....	21
Cloud, on-premises and hybrid .....	21
Summary of functions .....	22



# 01

## **Collect and organize information**

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

### File cabinets as a central information platform

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

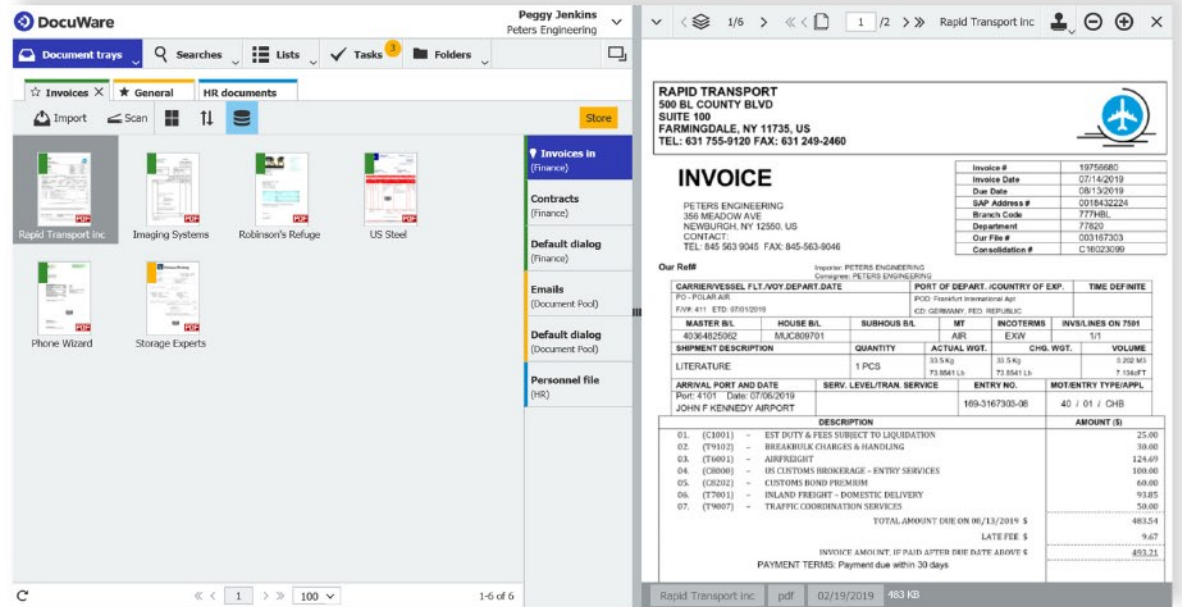
### User-specific dialogs for storing, searching and results

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

### Document capture from all sources

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

A document tray in DocuWare is a temporary storage that can be used alone or together to view, staple and sort documents before they are archived. Documents are archived in their original format or as PDF/A files.



The screenshot displays the DocuWare user interface. On the left, a 'Document trays' pane shows several file cabinets: 'Rapid Transport Inc', 'Imaging Systems', 'Robinson's Refuge', 'US Steel', 'Phone Wizard', and 'Storage Experts'. The main area shows a detailed view of an invoice document. The invoice is from 'RAPID TRANSPORT' and is addressed to 'PETERS ENGINEERING'. It includes a table of invoice details and a detailed shipping description table.

INVOICE #	19750505
Invoice Date	07/14/2019
Due Date	08/13/2019
SAP Address #	0018432224
Branch Code	777HBL
Department	77623
Our File #	003187303
Consolidation #	C16023090

DESCRIPTION	AMOUNT (\$)
01. (C4001) - EST DUTY & FEES SUBJECT TO LIQUIDATION	25.00
02. (T9102) - BREAKBULK CHARGES & HANDLING	39.00
03. (T6001) - AIRFREIGHT	124.69
04. (C3000) - US CUSTOMS BROKERAGE - ENTRY SERVICES	100.00
05. (CR202) - CUSTOMS BOND PREMIUM	60.00
06. (T7001) - INLAND FREIGHT - DOMESTIC DELIVERY	93.85
07. (T9007) - TRAFFIC COORDINATION SERVICES	50.00
<b>TOTAL AMOUNT DUE ON 06/13/2019 \$</b>	<b>483.54</b>
<b>LATE FEE \$</b>	<b>9.67</b>
<b>INVOICE AMOUNT, IF PAID AFTER DUE DATE ABOVE \$</b>	<b>493.21</b>

*Before securely storing documents in digital file cabinets, simply import, scan or drag and drop them into digital document trays.*

### Indexing without manual data entry

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

#### Machine learning

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

### Content transfer by marking

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

### Import from print stream

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

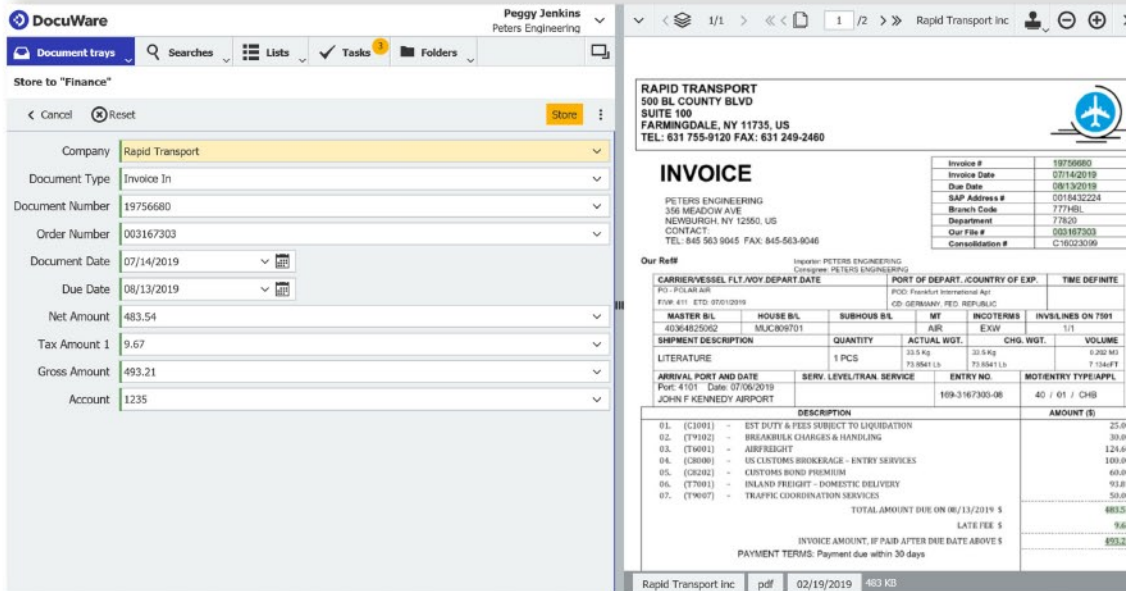
### File import with monitored folders

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

### Data synchronization

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

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



The screenshot shows the DocuWare interface. On the left is a 'Store to "Finance"' dialog with fields for Company (Rapid Transport), Document Type (Invoice In), Document Number (19756680), Order Number (003167303), Document Date (07/14/2019), Due Date (08/13/2019), Net Amount (483.54), Tax Amount 1 (9.67), Gross Amount (493.21), and Account (1235). On the right is a scanned invoice from Rapid Transport Inc. The invoice includes company details, an invoice table, a table of charges, and a total amount of 493.21.

Invoice #	19756680
Invoice Date	07/14/2019
Due Date	08/13/2019
SAP Address #	0018432224
Branch Code	77746L
Department	77620
Our File #	003167303
Consolidation #	C16023099

DESCRIPTION	AMOUNT (€)
01. (C1001) - EST DUTY & FEES SUBJECT TO LIQUIDATION	25.00
02. (T9102) - BREAKABLE CHARGES & HANDLING	30.00
03. (T1601) - AIRFREIGHT	124.69
04. (C2006) - US CUSTOMS BROKERAGE - ENTRY SERVICES	100.00
05. (C202) - CUSTOMS BOND PREMIUM	60.00
06. (T7001) - INLAND FREIGHT - DOMESTIC DELIVERY	93.85
07. (T9007) - TRAFFIC COORDINATION SERVICES	50.00
<b>TOTAL AMOUNT DUE ON 08/13/2019 \$</b>	<b>483.54</b>
LATE FEE \$	9.67
<b>INVOICE AMOUNT, IF PAID AFTER DUE DATE ABOVE \$</b>	<b>493.21</b>

### Connection to your email client

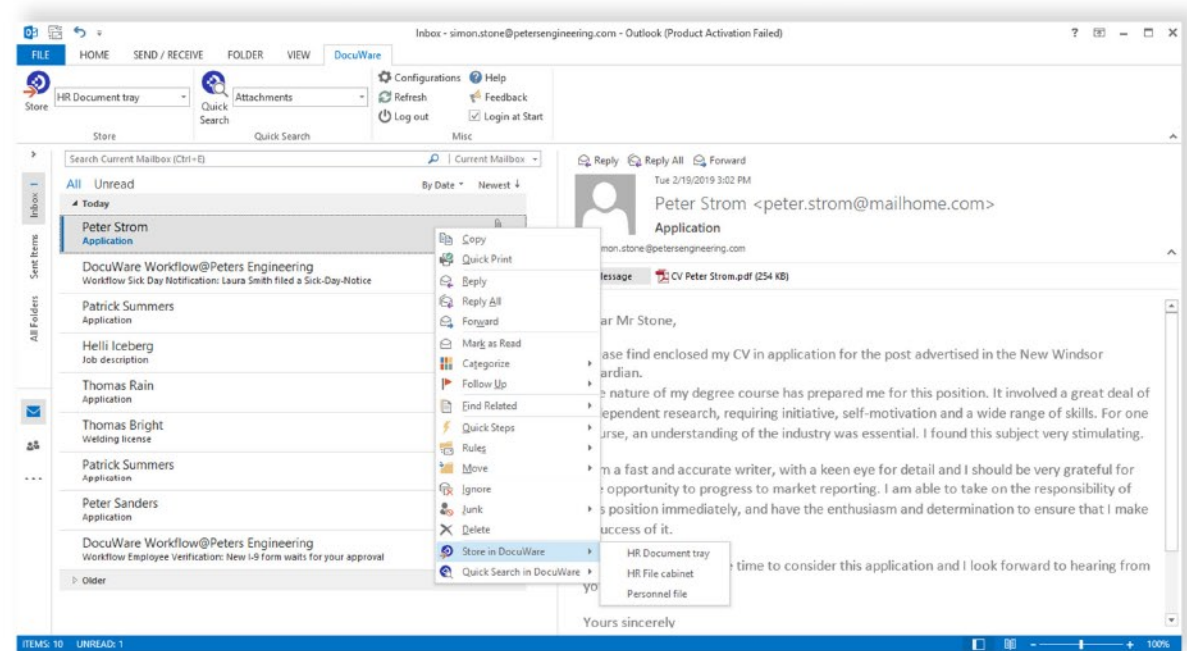
Email messages often contain key information that is essential for making your decisions. Manage your email along with associated business documents and make them available to all authorized colleagues. DocuWare collects email and attachments individually or together from any clients. Archived email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

### Email from Outlook

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

### Email from other accounts

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



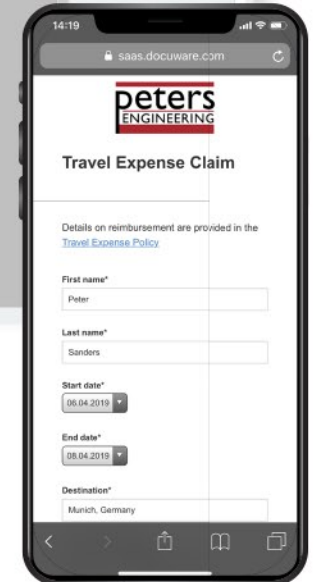
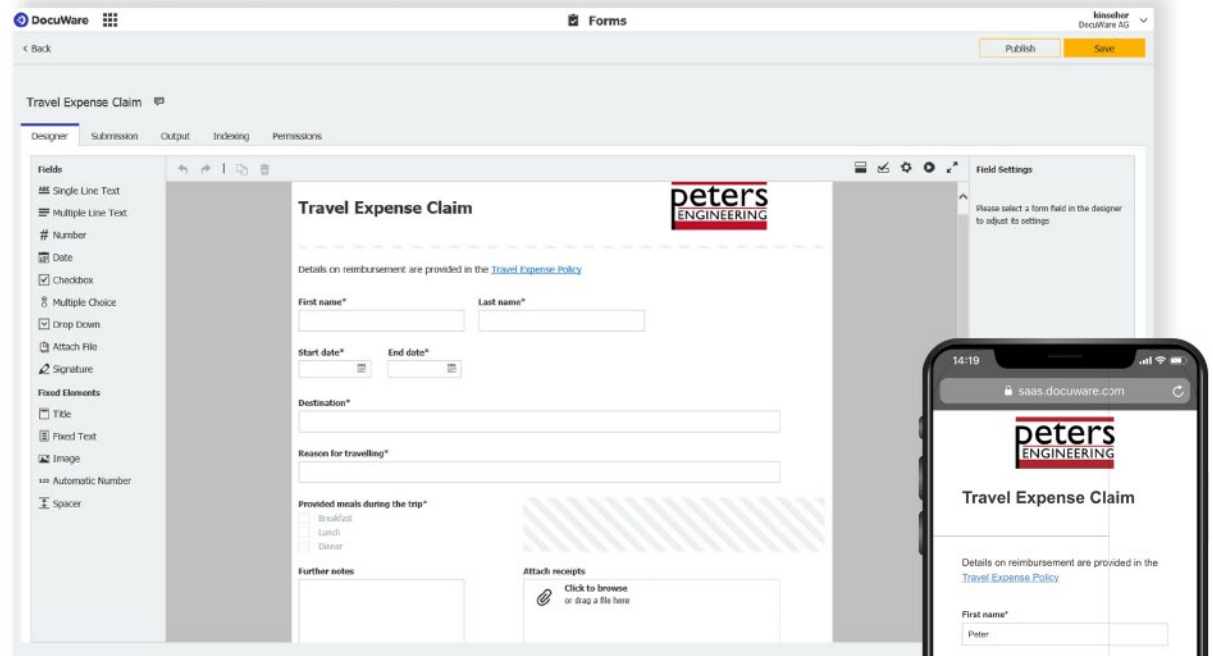
*DocuWare integrates seamlessly into Outlook.  
You can store or search for email in the DocuWare  
ribbon or via context menus.*



### Web forms for data capture

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

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



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

# 02

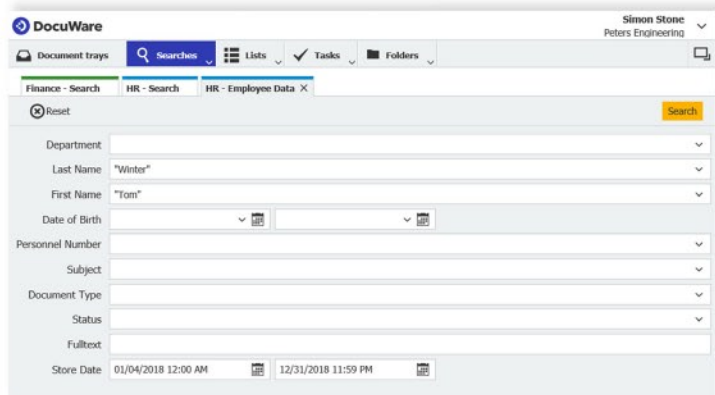
## **Access, display and edit content**

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

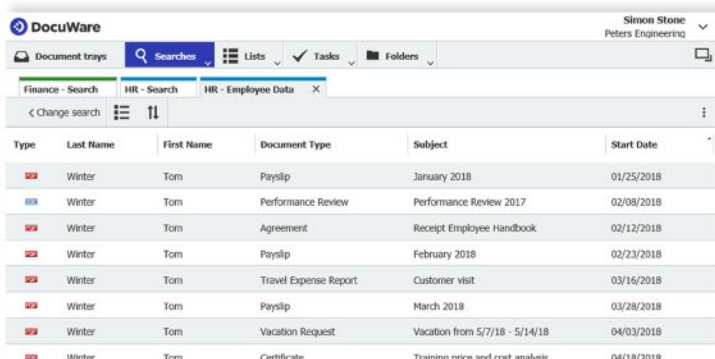
DocuWare provides your teams with comprehensive picture about a customer, project or business process within seconds.

### Flexible search

Enter individual search terms or select keywords from dropdown lists, use placeholders and logical links, and search the document content as well as the index data. The result is immediately available as a list that you can sort as you wish. Related documents are linked to one another as needed.



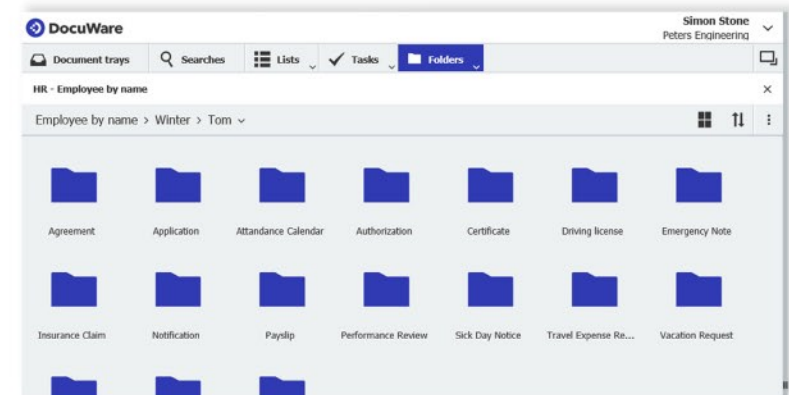
*Flexible keyword search:  
all personnel documents for an  
employee from a specific period.*



*Quick search result:  
all personnel documents for  
the employee in one overview,  
sorted by date.*

### Folder view

If you also prefer to sort your documents into folders, you can easily do that with DocuWare. Map your documents in any folder structure and work with multiple project files at the same time, each containing the same version of a document without multiple occurrences.



*Intuitive search via folders:  
all document types found in an  
employee's personnel file.*

### Search from other programs

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

### Display

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

### Editing

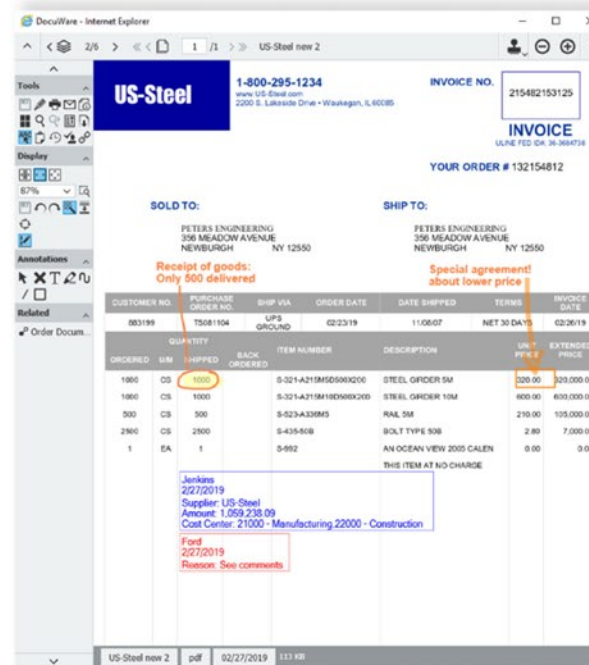
Attach notes, comments or stamps to documents or highlight important content. The document itself remains unchanged by the overlay technique. Alternatively, open and edit documents in the original program and save them directly back into the archive. Depending on the setting, DocuWare automatically creates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

### Share information

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

### Standalone archive

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



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

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