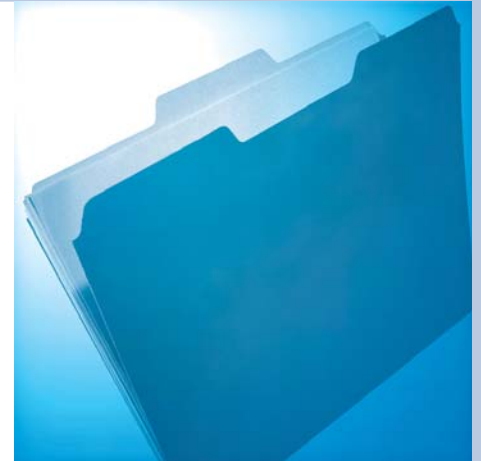


productinfo

CONTENT-FOLDER



Speed Up Your Workflow

Quick and direct access to current documents is guaranteed with CONTENT-FOLDER. The document-based information flow in your company is revved up with the help of CONTENT-FOLDER, improving all workflow processes. Idle phases and processing times are thereby significantly reduced.

The module CONTENT-FOLDER helps you work quickly and efficiently. Here are a few examples from the real world:

Keeping Up With The Latest

On a daily basis, a sales manager would like to check the status of the most recent sales proposals made in his region. He searches the DocuWare proposal file cabinet by region and date stored and uses the results to create a folder of dynamic links to the retrieved documents.

This folder can be placed either on his desktop or as a daily task or pending item in MS Outlook or Lotus Notes. Every time the folder is opened, the proposals made in the last few weeks are listed. CONTENT-FOLDER highlights any new proposals for immediate detection.

Coordinating the Information Flow

A project leader stores the first document outlining a new project in a

DocuWare file cabinet. She creates a new folder to contain all the project documents which will use the project name as one of the index words. Each member of the project team is then sent a copy of the folder.

Now they not only have access to the first document, but can also drag-and-drop any additional project documents right into the folder where they will be automatically filed in the DocuWare file cabinet. Every time the folder is opened or updated, every team member can see the documents that have been added or changed by their coworkers. New documents are listed in bold for quick review. With CONTENT-FOLDER, your efforts are coordinated, since an entire team automatically has access to all the documents for a project in their most current form.

Highlights

- Faster workflow
- Filed documents are bundled together by project or process
- Quicker access to filed documents
- Automatic updates reflect new and altered documents
- Folder design can be customized

Revving Up Workflow

The purchasing department has set up a folder for checking invoices containing links to new documents in the invoices file cabinet. If a new invoice is scanned at a central scanning station and stored in the invoices file cabinet, it will automatically appear in the folder setup by purchasing. After checking the invoice, purchasing writes a note on the invoice and changes its status with a field entry in the folder, from „new“ to „checked.“ As soon as the companys accounting staff opens the folder, they can automatically view those invoices that have already been „checked“ by purchasing. These invoices are now ready to be booked. CONTENT-FOLDER



helps speed up process times. All editing takes place using one original document stored in the filing system. Documents and versions of documents are never missing and their current status is clear.

Functionality of CONTENT-FOLDER Folders

DocuWare CONTENT-FOLDER generates folders in the form of XML files which contain one or more links to documents found in DocuWare file cabinets. These links can be created out of a DocuWare Result List or by using the results from a Folder Search Display. In the Result List, highlight the documents you need to link to the folder and click on the button marked To CONTENT-FOLDER. With the Folder Search Display, you call up the Context Menu belonging to one of the entries. These links may be collected into one new folder, added to an existing folder, or sent to someone by e-mail. If you change the index entries of any of the documents listed in the folder, these will automatically be updated in the database of the file cabinet in which the document was originally stored.

Groups

CONTENT-FOLDER always divides the links into groups. A group may only contain documents from a common DocuWare file cabinet. Since a folder may be made up of more than one group, your folder can display documents from a variety of file cabinets. The documents are listed as table entries, containing the file cabinet name and the entries in the database or

index fields. If a file is dragged from Explorer over to a group of links, the store menu is opened for that particular file cabinet. If a file has been dragged directly onto a single link, the store menu will open and display the index words used for that link, from the previously stored document. This speeds the indexing process, since the new document normally does not need all new index information, just a modification. This is how new documents are quickly stored in a DocuWare file cabinet.

Static and Dynamic Links

Users can choose between Static and Dynamic Groups. In a Static Group, the links point to a fixed set of selected documents. Changes made to a documents index entries are displayed in the folder, while deleted documents no longer appear.

In a Dynamic Group, in addition to the file cabinet and the index words, the search criteria which led to the original Result List is also stored. If a Dynamic Group of links is updated, DocuWare automatically searches through the file cabinet using the same criteria. CONTENT-FOLDER then generates a new list made up of all current documents that match. As opposed to a Static

Group, a Dynamic Group updates the folder automatically to reflect any new documents which fit the criteria. To make it as easy as possible to check the latest status, new or altered document links are highlighted.

Display and Design

CONTENT-FOLDER lets you customize folders based on your individual needs. You may choose which index fields of linked documents should be shown in the groups. In addition, you can display the system fields of documents, the name and symbol of the file cabinets in which the documents are stored, as well as the symbol representing certain document types. The design of groups and folders is all up to you. Customize the font style, size and color, as well as the background color of cells. You may also set up alternating colors for rows and special colors or font settings for certain columns. Most importantly, your selected design can help communicate a change in status or certain characteristics about the documents contained in your folder – making it even easier to stay on top of everything thats happening on a daily basis.

Result list - "Standard Search Dialog" - ACCOUNT - 5 Hit(s)

Doc.-Type	Company	Date	Doc.-Number	Status
INCOMING INVOICE	BERRY IMPORT	10/11/2005	4762	NEW
INCOMING INVOICE	TELNET CORP.	11/11/2005	4764	NEW
INCOMING INVOICE	BIRDLAND	08/11/2005	4760	NEW
INCOMING INVOICE	PORTLAND INC.	09/11/2005	4758	NEW
INCOMING INVOICE	WINTER CORP.	14/11/2005	4762	NEW

Settings Help End

Invoice.cf5 - DocuWare CONTENT-FOLDER

File Edit Format Tools View ?

Account (4 entries)

Doc.-Type	Company	Date	Doc.-Number	Status
INCOMING INVOICE	BERRY IMPORT	10/11/2005	4762	NEW
INCOMING INVOICE	TELNET CORP.	11/11/2005	4764	NEW
INCOMING INVOICE	BIRDLAND	08/11/2005	4760	NEW
INCOMING INVOICE	PORTLAND INC.	09/11/2005	4758	NEW

Ready

Using a Result List, you select all of the documents you would like to link to. With a quick click on the button "To CONTENT-FOLDER" a folder is created containing all the links to a group of documents.

Invoice verification.cf5 - DocuWare CONTENT-FOLDER

File Edit Format Tools View ?

Account (9 entries) Doc.Type = incoming invoice # delivery note; Status= ... 04/26/2005 11:35

Please check invoices on receipt of goods and correctness of the items!

Doc.-Type	Company	Date	Doc.-Number	Status	stored by	last access by
					stored on	last access on
DELIVERY NOTE	BERRY IMPORT	11/09/2005	55647	GOODS CHECKED	SELLERS	ROBBINS
INCOMING INVOICE	BERRY IMPORT	11/10/2005	4762	NEW	DAVIS	WINTER
INCOMING INVOICE	BIRDLAND	11/08/2005	4760	NEW	DAVIS	
DELIVERY NOTE	PORTLAND INC	11/04/2005	34678	GOODS CHECKED	SELLERS	ROBBINS
INCOMING INVOICE	PORTLAND INC.	11/09/2005	4758	NEW	DAVIS	
DELIVERY NOTE	TELNET CORP.	11/07/2005	9823	GOODS CHECKED	SELLERS	ROBBINS
INCOMING INVOICE	TELNET CORP.	11/11/2005	4764	NEW	DAVIS	
DELIVERY NOTE	WINTER CORP.	11/05/2005	56478	GOODS CHECKED	SELLERS	ROBBINS
INCOMING INVOICE	WINTER CORP.	11/14/2005	4763	NEW	DAVIS	SUMMER

Ready

Other Applications

- Favorite Documents: A folder is set up with links to the most used documents stored in a DocuWare file cabinet, providing quick access to these documents right from the desktop.
- Hot Off The Press: A folder is set up to contain links to the most current information, such as sales numbers and price lists.
- Version Management: With a click on a folder, every employee working with technical documentation can quickly see the most recent version of the document and what has been added or updated.
- Communication: Send a coworker a folder by e-mail containing a link to a certain document, requesting his signature or an electronic stamp.

Design of groups and folders in CONTENT-FOLDER may be customized. The background color of cells or certain columns may be selected. Annotations may also be added to individual groups – such as specific work instructions.

Functions

Creating Folders

- Via DocuWare Result List
- Via Folder Search Display in DocuWare
- Directly in CONTENT-FOLDER via File - New

Group Types

- Static Group: Links to documents contain file cabinet names and entries in database fields
- Dynamic Group: In addition to Static Group, the index words that led to the Result List are stored

Adding Previously Filed Documents to Folders

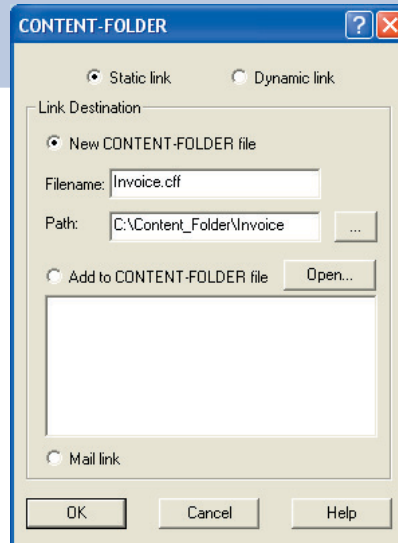
- Via DocuWare Result List
- Via Folder Search Display in DocuWare

Storing Via Folder

- Directly in CONTENT-FOLDER through File Import
- Drag-and-drop file into a Group, whereby:
 - File is placed on a link; index words of this link are transferred into the store menu
 - File is not placed on a link; the index words must then be manually entered into the DocuWare store menu

Synchronization of Folder/DocuWare File Cabinet

- Automatic update of the changes made in DocuWare in index when opening a folder



- Synchronization with data in DocuWare via button „Synchronize“
- Changes made in the index entries of a folder are updated in DocuWare archive/system
- Automatic, dynamic links to new file cabinet documents

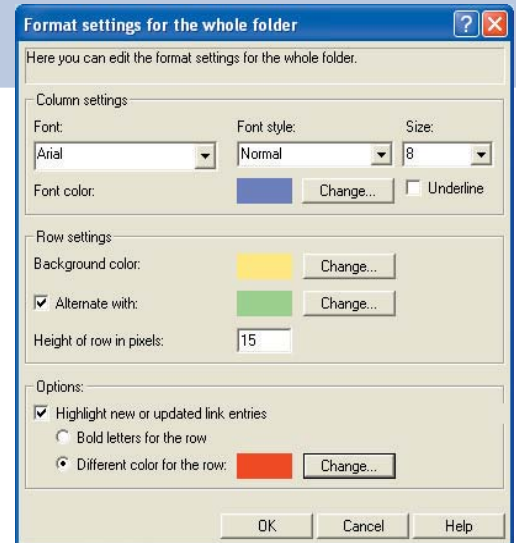
Optional Settings:

Group Headers

- File Cabinet Symbol
- File Cabinet Name
- Search Criteria (for Dynamic Groups)
- Most Recent Synchronization Date (for Dynamic Groups)
- Replace search criteria with any text
- Individual settings for options outlined above: enable/disable, font type, style, size, color
- Background color can be selected for headers
- Annotations for each group can be placed under header

Columns

- Choice of columns: All database fields, system fields, symbols representing document types and last synchronization date



- Column headers can be enabled or disabled
- Multiple column headers can be displayed in one column
- Font type, style, size and color can be adjusted for each column
- Special background colors can be set for individual columns

Rows

- Alternating row colors, for better legibility
- Rows for new or altered links can be highlighted with special background colors and bold typeface

Compatibility

- Mail programs that support XML files as attachments
- Windows Desktop and Explorer as storage destinations for XML files
- MS Outlook Calendar, Tasks, Contacts, that can handle XML files
- Workflow and similar programs that support files as attachments

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