

# productinfo



## ACTIVE IMPORT

### Storing E-mail and Files Automatic – Simple – Organized

*ACTIVE IMPORT monitors selected folders in Outlook and the file directory, then stores all e-mails and documents that it finds there in DocuWare's central document pool. ACTIVE IMPORT works in the background to automatically file your e-mails and ensure the seamless integration of network scanners.*

#### Application

DocuWare ACTIVE IMPORT is an add-on module to the basic DocuWare software package. This module is invoked simultaneously with the main DocuWare program and works in the background. ACTIVE IMPORT 3's main tasks are to monitor certain folders or subdirectories on your PC or in your e-mail program, import incoming files and objects into DocuWare, and to store them automatically. Documents that are, for example, created by scanning on digital copiers are placed in appropriate network directories monitored by ACTIVE IMPORT, which then transfers the documents to DocuWare.

#### Save E-mail Automatically

Incoming e-mail has a wide variety of content. Today, it's common to receive everything from proposals to product orders to advertisements and plenty more via e-mail. To store a particular e-mail is simple – just click on it and drag it over to a file folder set up in Outlook. From there, DocuWare will

store it automatically using the right keywords. During storage, e-mail messages are assigned certain keywords – also called index words – such as the date of transmission, sender/recipient, subject, etc. Using these index words, an e-mail message can quickly be retrieved. If you wish to automatically add index words, ACTIVE IMPORT also offers enhanced indexing. This feature utilizes a specific field in the incoming message, such as the e-mail address, to search for additional information in either an Outlook address book, DocuWare database or external database. That way a company's complete name or the contact person can be added automatically during storage to the index.

#### Highlights

- Automatic e-mail storage
- Integration with digital copiers
- Automatic import and storage of scanned files in DocuWare
- Document sorting
- Capturing index words from external data sources

#### System Requirements

- MS Outlook 2003 or higher
- MS Exchange Server 2000 or higher

#### Add Pre-Indexed Documents Automatically

Another application is the storage of pre-indexed documents. In this process, documents that are created or scanned off-site (for example, in a regional sales office or subsidiary) are assigned index words by DocuWare and then sent as e-mail attachments to the main office. On the recipient's end, the attachment is automatically filed – ACTIVE IMPORT imports the index words, so that a completely indexed document is stored immediately, without any additional work.



### **Store Incoming Invoices Automatically**

A barcode sticker is placed on incoming invoices when they are booked into the accounting program. They are then either scanned or digitally copied into a directory monitored by ACTIVE IMPORT. Using the barcodes, the reference numbers of the invoices are read. These numbers, in turn, are used to search external files or databases for additional index words, such as supplier name, purchase order number and invoice date which are used to then automatically index and store the invoices.

### **Sort Documents Quickly**

Scan a big pile of documents at once and let ACTIVE IMPORT do the sorting into groups of incoming or outgoing invoices, proposals, orders, etc. It's done by integrating DocuWare RECOGNITION or even an external OCR program into the ACTIVE IMPORT job, to scan for pre-specified characteristics of the various document types. After the documents have been sorted, ACTIVE IMPORT can take it one step further, by storing them in different file cabinets using specified index words.

### **Functionality**

DocuWare ACTIVE IMPORT is an enhanced version of the original ACTIVE IMPORT module. The add-on module can be installed on any computer running DocuWare: On Client-PCs for individual ACTIVE IMPORT jobs, for DocuWare users, as well as on a Server for global jobs. In both cases, ACTIVE IMPORT monitors pre-selected directories. Files and e-mail that ends up in these directories are automatically imported into DocuWare or other designated file directories. When DocuWare is started, ACTIVE IMPORT is activated and its symbol appears in the Windows task bar. ACTIVE IMPORT offers various settings to precisely define the storage process. They impact the following areas:

## **Selection of Document Source**

### **E-mail**

- Source: Select the e-mail folder to be monitored
- Delete/copy the original
- Store e-mail sender/header information with the content
- Store e-mail attachments only
- Conversion of black/white TIFF, JPEG, BMP, PCX and PNG files into DocuWare TIFF format
- Store as Outlook Mail Object
- Filter e-mail with certain addresses
- Process only incoming or outgoing e-mail

## **Preparing Documents through External Programs**

- Indexing via meta-index-file (an additional file in DocuWare meta-index format) from which index words are extracted
- Barcode recognition or reading index words from a TIFF file via OCR integrated in DocuWare RECOGNITION

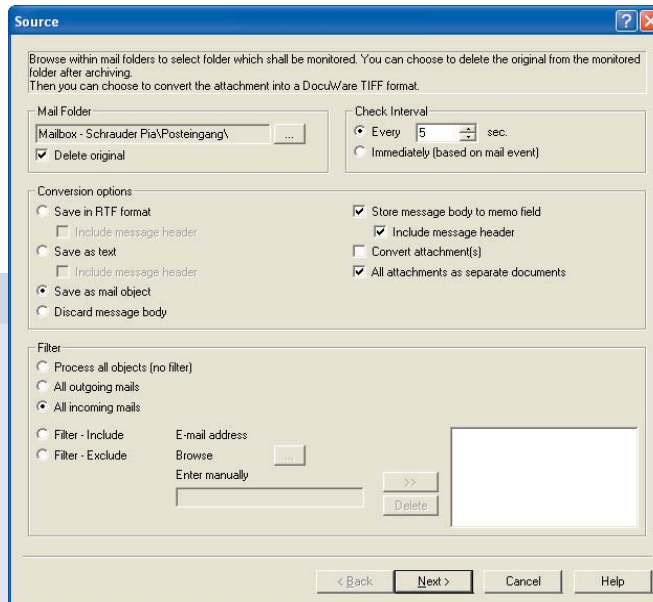
## **Variable or Constant Targets for Storage**

### **E-mail**

- DocuWare basket or DocuWare file cabinet
- Constant Target: All e-mail is stored in one specific spot
- Variable Target: e-mail is forwarded dependent upon sender, recipient, subject, date of transmission or receipt, and - in the case of documents with DocuWare headers - field content

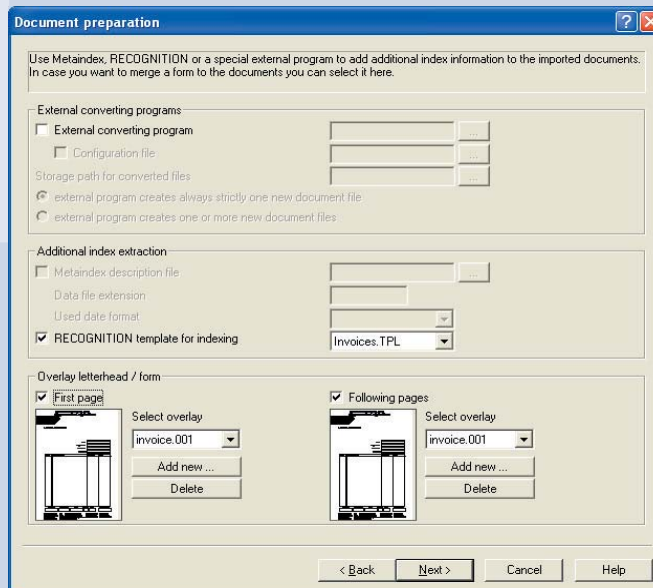
## File

- Source: Select the directory to be monitored (a directory on a local PC or Server)
- Delete/copy the original
- Conversion of black/white TIFF, JPEG, BMP, PCX und PNG files into DocuWare TIFF format
- Filter files with certain extensions (up to 100), or exclude them from processing
- Combine several numbered files into a single document
- Interval for checking the directory for new files



*Settings for e-mail, which will be imported*

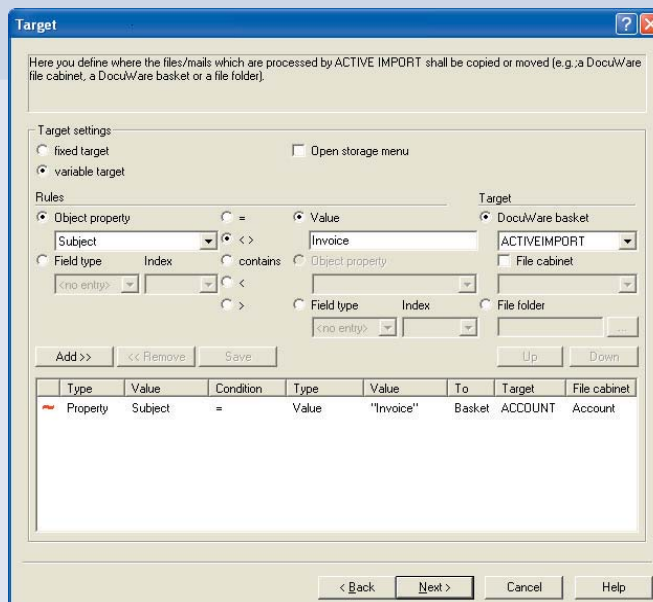
- External conversion programs for preparing documents may be integrated
- Adding forms or letterhead to the background to retain look or format of the original document, which was printed on letterhead or form paper



*Settings for preparing documents*

## File

- DocuWare basket or DocuWare file cabinet
- Constant Target: All files are stored in one specific spot
- Variable Target: Files are forwarded dependent upon file name, extension, size, date of creation or last editing. In the case of documents with DocuWare headers, field content can also be used



*Setting up the target*

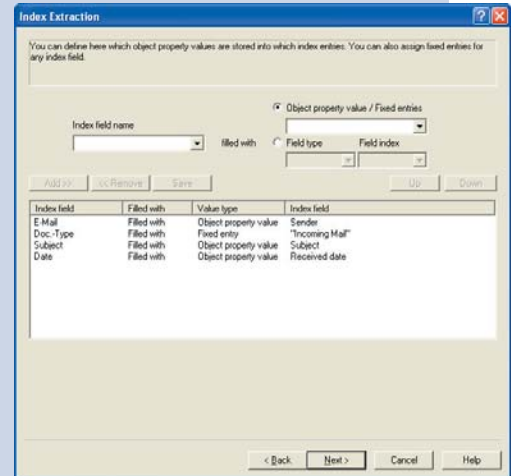
## Indexing

### E-mail

- A constant value is used as the index word, e.g. each stored mail is assigned the value "Incoming E-mail" in the Doc type field
- Mail properties, e.g. sender, recipient, subject or transmission date are used as index words
- In the case of documents with DocuWare headers, index words are read from the fields

### File

- A constant value is used as the index word, e.g. each file stored in a specific directory is assigned the value "Incoming Invoice" in the Doc type field
- Document properties such as file name, extension, size, date of creation or last editing are used as index words
- In the case of documents with DocuWare headers, keywords are read from the fields



Index Assignment

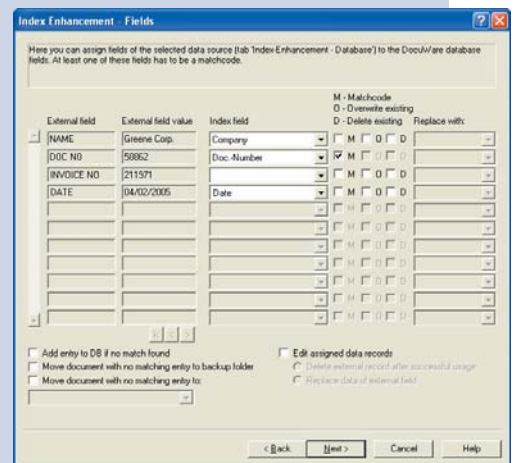
## Enhanced Indexing

### External Data Source

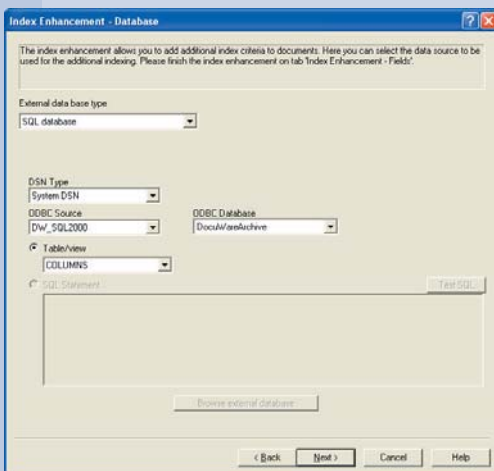
- MAPI address book (only for mail jobs)
- DocuWare document database
- Delimited text files or a text file with fixed field lengths
- SQL database
- SQL database table or view

### Data Assignment

- Index words can be extracted from an external data source.
- Setting up matchcodes: An index word previously entered into a DocuWare index field is linked to an external field.  
Example: The index field "Doc-Number" filled with the document number is linked to the field called "DOC NO" in the accounting software's database. In that way the data record from the accounting program is attributed automatically to the document to be archived with the same record number.
- Now it's possible to extract additional field information such as company and contact and transfer them as index words.



Index Enhancement – Fields



Assigning external data source

For more information please visit our website at [www.docuware.com](http://www.docuware.com)