

## Connect to Outlook

ProductInfo



## A strong team: DocuWare and Microsoft Outlook

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

## Using Connect to Outlook

Throughout a typical working day, hundreds of emails can flood your inbox. They are an important part of your work and you need to be able to access them at all times. As business correspondence they are also subject to legal retention periods. Connect to Outlook, the connection from MS Outlook to DocuWare, allows you to do both in a quick and easy manner. Not only can you archive your email directly from Outlook but you can use the quick search feature to access them all in a matter of seconds.

### Convenient Archiving From Outlook

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

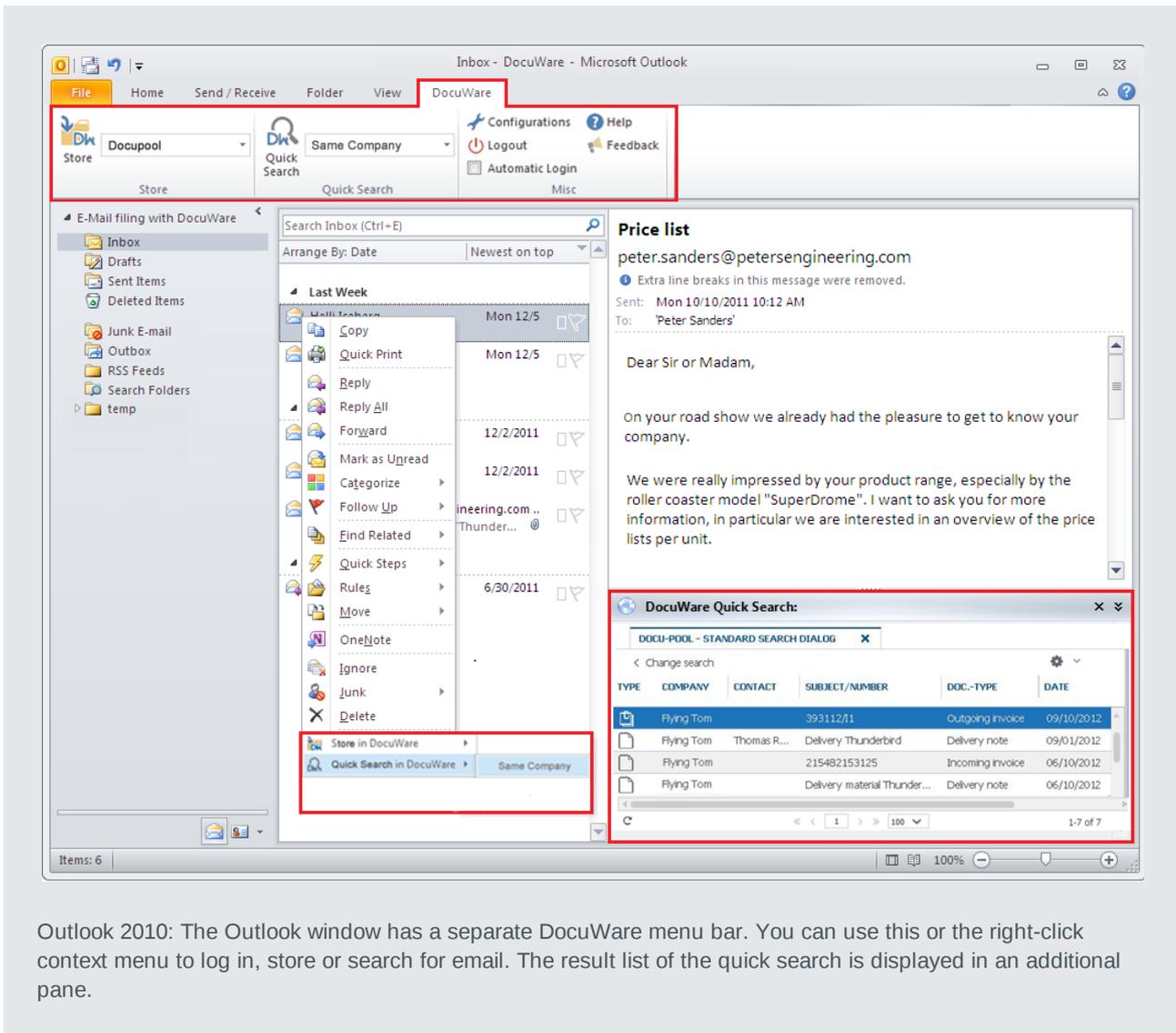
You can store email in all standard formats: MSG (Outlook), DOC (Word), RTF, PDF, and PDF/A (long-term archiving format according to ISO standard). Attachments are archived in their original format.

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

## Benefits

- Fast: store email in DocuWare directly from Outlook
- Practical: access archived email from Outlook
- Convenient: easy, central setup
- Efficient: use data from MS Outlook, DocuWare, or any SQL database for storing and searching

Using the *Send and store* button you can send and archive your emails simultaneously. This applies to new emails and emails that you reply to and forward. Especially practical: The button can be integrated in the MS Outlook quick-access toolbar.



Outlook 2010: The Outlook window has a separate DocuWare menu bar. You can use this or the right-click context menu to log in, store or search for email. The result list of the quick search is displayed in an additional pane.

### Precise Indexing for Speedy Retrieval

You can set up the indexing of email to suit your requirements. Sender, recipient, date, subject, and other email information is used for automatic categorization and indexing. Contact and company names can be supplemented with information from address books and other databases. This might be Outlook contacts, DocuWare file cabinets, your CRM or ERP, i.e. any databases that are queried by SQL. Connect to Outlook connects directly with the database; you do not need a local data source.

You can set up email storage in the Web Client settings in four easy steps. In the second step you set up the store format and designation to specify whether the email and their attachments should be kept in Outlook after they have been stored.

In addition, Connect to Outlook can detect and automatically index invoices in the ZUGFeRD standard. It is easy to then further process invoice data in DocuWare and in your financial software. So that Connect to Outlook can read ZUGFeRD data, first set up a DocuWare Import configuration, which you then integrate into the Connect to Outlook storage configuration. ZUGFeRD is an invoice format applicable to Germany that conveys uniformly structured invoice data.

### Practical: Keep Archived Email in Outlook

In many organizations, employees' Outlook accounts are limited in terms of their size. This means that important emails are often stored to local folders where the files are not backed up. With Connect to Outlook, you can archive your emails but still keep them in Outlook.

Depending on the configuration, one of three procedures will happen after you store email in DocuWare:

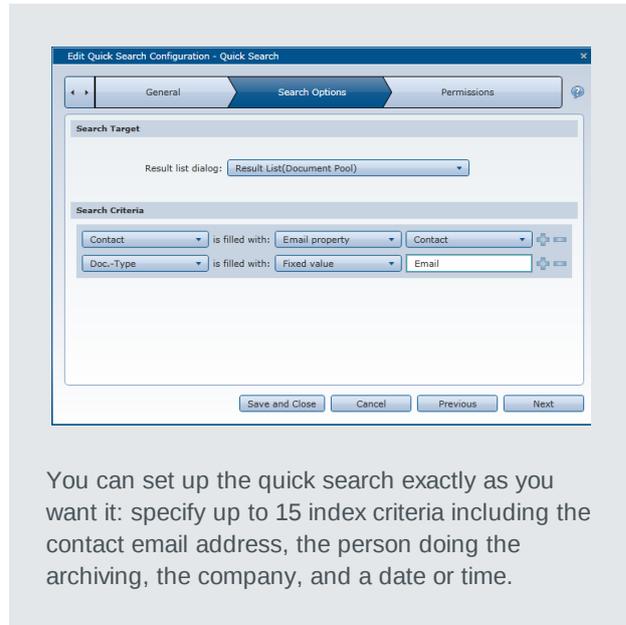
1. The email is deleted from Outlook with its attachments.
2. The email is kept in Outlook and only the attachments are deleted. The file names of the attachments now appear at the bottom of the email text. This means you always know exactly how many documents of what type were included in the original email.
3. The entire email and its attachments are kept in Outlook.

You can mark archived emails, which are still kept in Outlook, as stored with the "DocuWare" category in Outlook. If you prefer to store email manually using drag & drop, you simply need to set up a separate folder in Outlook.

### Quick Search Button Means Instant Access

Use the Connect to Outlook quick search to directly find all related documents in the DocuWare file cabinet. Select the email and click Go on the DocuWare menu bar or context menu for the quick search. The retrieved documents are displayed in a result list in a separate Outlook section of the window.

In addition to the documents in an email you can display a list of the documents to edit directly in Outlook. For example, you could authorize pending invoices immediately: Through the list you can call up the documents in DocuWare and add an electronic stamp or other comments to them there. To use the DocuWare lists in Connect to Outlook you need a Task Manager license.



You can set up the quick search exactly as you want it: specify up to 15 index criteria including the contact email address, the person doing the archiving, the company, and a date or time.

### Retrieve Archived Email

Quick search and attachments can also be combined: To find the attachments again, use the quick search to locate emails by sender, subject, or date. The attachments appear in the viewer or in a result list depending on the number of attachments. You can search e.g. for all emails you received from employees from the same company. You can also limit your search to a certain period, e.g. the last 30 days.

Through DocuWare you have even more options when sending documents than in Outlook itself. You can send an email in both the original format and in full with all attachments as a PDF file. Or you could simply send one specific attachment. The Quick Search supports you finding the documents you want to send.

### Share Information

If you archive your emails with Connect to Outlook, emails and attachments are available to your colleagues in the central document pool and can be used for project documents, for example. They can also be accessed via Windows Explorer Client, in addition to DocuWare. By archiving, you are making a significant contribution to helping workflows in your company to run smoothly.

# Configured and Installed Easily

## Configuring Connect to Outlook

Configurations can be set centrally and can be assigned to different users or roles. Non-administrators can also set them up easily if they have the necessary rights. Set up email archiving and quick search for Connect to Outlook in the DocuWare configuration. Depending on the permissions, only administrators may be able to create configurations, or users may be able to too.

## Setting up Store Configurations

A wizard guides you through five easy steps in order to set up a storage configuration. Enter general information here (e.g. the name of the configuration), the options (e.g. file format), and the storage destination (e.g. index extraction). Lastly, assign a configuration to specific users or roles.

## Set Up Quick Search Configurations

A wizard guides you through three easy steps to specify general information (e.g. configuration name) and search options (e.g. result list and search criteria selection). Lastly, assign a configuration to specific users or roles.

## System Requirements

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Connect to Outlook can be used with the PROFESSIONAL and ENTERPRISE server systems.

- DocuWare 6.6
- All Windows Client operating systems for 32-bit and 64-bit from Windows Vista with SP2
- Server operating systems from Windows Server 2008
- Microsoft Outlook 2007 (32 bit) (according to Microsoft, no support for Windows Terminal Server)
- Microsoft Outlook 2010 (32 bit) (the features "Send and store" and "Manual storage" to the monitored folder are not supported in Terminal Server environments)
- Microsoft Outlook version 2013 (32 bit) (the features "Send and store" and "Manual storage" to the monitored folder are not supported in Terminal Server environments), the Exchange Cache mode must be enabled on each client computer
- For searching for and displaying emails, Internet Explorer browsers, version 9 and higher, and Firefox browsers, version 3.0 and higher, are supported.
- The Exchange Cache mode must be enabled on each client computer



This document can also be found here:

<http://pub.docuware.com/en/connect-to-outlook>

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