DocuWare

Connect to SharePoint

ProductInfo

Audit compliance and long-term archiving for SharePoint

Connect to SharePoint integrates Microsoft Office SharePoint with the DocuWare integrated document management system. SharePoint users have an ideal solution for storing documents directly from SharePoint and lightening the load on their libraries.

Microsoft SharePoint Server combines and manages business intelligence via Web-based portal solutions: people can work together on documents, publish information, search for relevant data, and exchange know-how and documentation. New content, documents and versions are continually being produced, causing the data volume to grow exponentially.

Optimize performance and ensure legal compliance
If you want to maintain the performance of your SharePoint environment, you will have to move data to a different location. As well as finding a repository for complete and clear documentation, you need to comply with statutory retention periods. You must also abide by data protection rules and implement security measures. It soon becomes clear that the integration of efficient archive functions is an im-mensely important issue for SharePoint users. On one hand, they need to stabilize SharePoint performance and guarantee data protection. And on the other, they need to satisfy a wide range of compliance standards.

Benefits

- Audit-compliant archiving of all SharePoint documents
- Lightens the load on the SharePoint database and improves the performance of the SharePoint portal
- Store and access archived documents directly from SharePoint
- More user-friendly thanks to easy connection and flexible customization

On the safe side with DocuWare

DocuWare specializes in the long-term archiving of important business data and can easily manage several billion documents in a single central document pool. DocuWare satisfies legal requirements effortlessly and guarantees audit compliance. All information is permanently available and user-friendly search functions mean it is easily retrieved for further processing. Depending on the configuration, DocuWare can automatically delete data at the end of a retention period. And it's easy to bundle documents together and save them to CD along with a search function — making them available to customers or external auditors. Thanks to Connect to SharePoint, SharePoint users can enjoy all these benefits too.
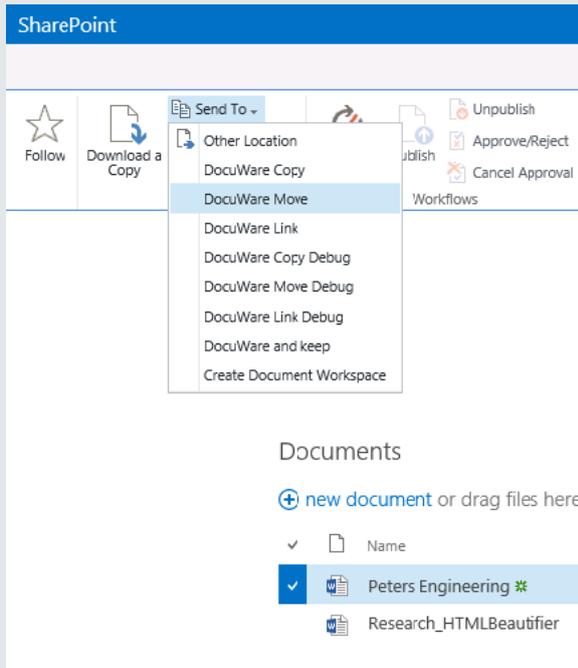
System requirements

- DocuWare 6.5
- From Microsoft SharePoint Server 2007

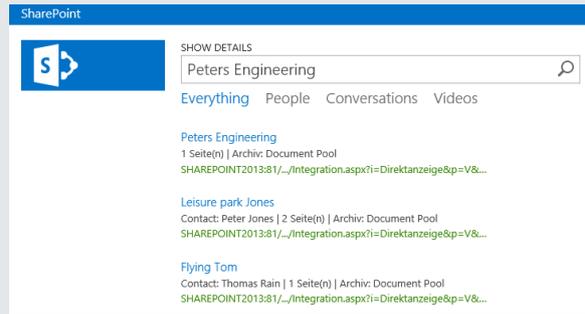# SharePoint and DocuWare — a strong team

The ***DocuWare Connect to SharePoint add-on module*** also creates a seamless, standard link between SharePoint and DocuWare, while ensuring that both systems interact perfectly for storing and searching directly from SharePoint. One major advantage is that Connect to SharePoint supports Single Sign-on: once users have logged into SharePoint they can access DocuWare without any further login.

Archive documents in DocuWare — directly from SharePoint

Storing a document in a DocuWare file cabinet from SharePoint couldn't be simpler: You can access the "send to" option from the context menu or a file's ribbon bar. This feature copies the selected document by default in its original format into a DocuWare file cabinet. Connect to SharePoint ensures that each SharePoint document archived is automatically assigned index criteria. This guarantees the best hit rate when searching in DocuWare search dialogs.

Audit-compliant long-term archiving made easy: two clicks is all it takes to archive documents directly from SharePoint to DocuWare.

A separate results area shows the hits from the DocuWare file cabinets. The user can open the documents directly from the SharePoint application with a single click.

Find and display archived documents

With Connect to SharePoint, a search run in SharePoint automatically includes a search in DocuWare file cabinets. So even SharePoint documents that have already been archived are included in any search. And for perfect clarity there's a special results area that displays the results from DocuWare file cabinets separately. A single click opens the documents directly from the SharePoint application.

Product architecture

DocuWare uses official Microsoft standards in Connect to SharePoint. The add-on module integrates DocuWare in SharePoint as a Records Center. This Records Center is a basic feature of Microsoft SharePoint Server. It is designed as the central storage location for documents and for the standard integration of document management systems.

DocuWare & SharePoint — What are the strengths?		
	DocuWare	**SharePoint**
Collaboration	+	++
Portal	o	++
Document Capturing	++	o
Document Imaging	++	o
Long Term Archiving	++	o
High Volume Document Filing	++	o
Document Workflow	++	+
Records Management	++	+
Enterprise Search	o	++
Business Intelligence	o	+

Interactive or rule-based storage

To enable rule-based storage, Connect to SharePoint again relies on SharePoint standards: using custom actions or custom policies you can customize the archiving to your requirements via separate, individual program elements. This allows you to specify, for example, that once SharePoint documents have been successfully archived in DocuWare they should be deleted in SharePoint (this is a standard feature from SharePoint 2010). Or you can define a period after which documents should be sent to DocuWare for long-term archiving and then automatically deleted from SharePoint.

Document indexing

As soon as a document — interactive or rule-based — is transferred from SharePoint to DocuWare for archiving, the documents are indexed automatically in the background. Each document is assigned to a specific type in SharePoint. This document type is always linked with a series of properties, so-called Records Repository Properties. These properties include a set of index data. At storage in DocuWare, DocuWare imports this index data and writes it to the index fields of the file cabinet. The administrator maps the SharePoint index data to the DocuWare index fields once — after which all documents are automatically indexed in DocuWare. Any DocuWare file cabinet can be selected, depending on the document type. The configuration for this is done by defining routing types.

Search integration

In SharePoint you can run search queries in different sources using a search federation. Connect to SharePoint allows SharePoint users to extend their search from SharePoint into DocuWare as an search source. It uses open search to look for hits in the fulltext of DocuWare file cabinets. Users see the results directly in SharePoint and can display the documents ad hoc. The results can be returned as RSS feeds or as normal HTML pages.

Features

Store from SharePoint

- DocuWare as SharePoint Records Center

- Audit-compliant long-term archiving for SharePoint documents in DocuWare

- Manual storage of documents from SharePoint in DocuWare using "send to"

- Automatic storage from SharePoint in DocuWare using programmable custom policies

- Rule-based storage of documents from SharePoint in DocuWare using individually programmed custom actions and custom policies

- Storage in original format

Administration

- Administration via Connect to SharePoint Web administration

- User

- Mapping definition for sending index data from SharePoint to index fields in DocuWare file cabinets

- Definition of routing types: which SharePoint document type is stored in which DocuWare file cabinet

- Individually configure the description of a result in the DocuWare results area (display field contents)

Search in SharePoint

- Combined search in SharePoint and DocuWare using open search

- Separate DocuWare results area on the SharePoint user interface

- Display DocuWare results directly from SharePoint

- Access DocuWare via Single Sign-on (ID checked against Windows Active Directory)

DocuWare

This document can also be found here:

http://pub.docuware.com/en/connect-to-sharepoint

For more information please visit our website at

www.docuware.com