

Smart Connect

ProductInfo



DocuWare Easily Integrates into Third-Party Applications

Use Smart Connect to access your DocuWare file cabinets directly from any program you're working in. From your familiar user interface, one click on Smart Connect links you to relating documents.

Smart Connect reads words directly from a third-party application user interface and then uses them as search or index words in DocuWare. Documents relating to a data record opened in the third-party application are easy to call up in DocuWare – using a button displayed in the third-party application. It is just as easy to import words as index terms for documents that you want to archive in DocuWare.

Functionality

When you use Smart Connect, a previously defined configuration is always run. You use the configuration to define which contents from the third-party application you want to use in DocuWare, and whether searching (Smart Search) or indexing (Smart Index) should be run. Creating a configuration is easy: a wizard guides you through each step. Start by taking a screenshot of the third-party application window and selecting the elements to be read from the screenshot. You finish by creating the Smart Connect button which will appear in your existing third-party user interface. Use this button to do your Smart Search since you are now integrated with your DocuWare file cabinet. When using Smart Index, the button is automatically displayed in the DocuWare store dialog.

Benefits

- Access related documents in DocuWare direct from third-party applications
- Integrate DocuWare in any program without the need for programming
- Configurations are easy to set up
- Configurations can be assigned to other users
- Compatible with all three DocuWare Server editions: BUSINESS, PROFESSIONAL and ENTERPRISE

Since Smart Connect configurations are so quick and easy to set up, they are worth creating even for applications that process only a few documents per day. The smooth interaction between DocuWare and the third-party application is very convenient for users and saves time. You can set up your own Smart Connect configurations for your personal workflows or create centralized configurations that can be used by all employees in a department.

Application Examples

Smart Index in an accounting application

You have an accounting software application which you use to post invoices, and DocuWare where the invoices are archived. Previously you would have had to enter data, such as the invoice number, company name and total, twice – once for each process – but with Smart Index you can complete both tasks in one step.

You have opened the accounting system and DocuWare side by side. You start by archiving the scanned invoice in DocuWare - the invoice is displayed in the Viewer and the DocuWare store dialog opens. Now go to the accounting system and enter the invoice data, for example the company, date, invoice number, and total. When you now call up the Smart Connect function in the DocuWare store dialog, all this data from the accounting system's user interface is imported into the corresponding fields of the store dialog. This process enables automatic assignment of index terms in DocuWare at the touch of a button, typing errors from entering the data twice are excluded - which also excludes inconsistencies between data in the accounting system and index words in DocuWare.

Smart Search from Accounting

When you need to edit the record for an invoice in the accounting software and you want to view the invoice for that record at the same time, you can simply click the Smart Connect button displayed in your accounting software program. Clicking this button causes the invoice number and company to be read from the user interface of the accounting system and these terms are then used to run a search in DocuWare. The invoice matching the data record is displayed directly in the DocuWare Viewer.

By using more than one configuration you can also display several Smart Connect buttons in the same third-party application. For example, one button could be used to display the invoice and another to display the delivery note relating to the same accounting record. You can customize the Smart Connect button label for the configuration.

Smart Search for HR

Your HR department uses a specific program but your HR records such as applications, employment contracts and vacation forms are all stored in an HR file cabinet in DocuWare. An employee number is used in both systems, and in DocuWare there are also index fields for the document type and status. It is easy to set up a suitable Smart Search configuration for different application scenarios.

For example, to create pay slips you may frequently need to refer to the employee's vacation forms. With Smart Connect you can do this directly from the HR software. With the record for an employee open, simply click the Smart Connect button and the latest vacation form for that employee will appear in the DocuWare Viewer. You can also use the result list to access all other vacation forms for this particular employee. According to the definition of the Smart Search configuration that was run in the background, the employee number is imported from the displayed record. For additional search criteria "vacation form" is used for the document type and "valid" for the status. Corresponding configurations can be created for other document types.

Using Smart Connect

Orders By Customers - jenkins

| | | | |
|--------------|----------------------|-------------|---------------|
| Customer No. | 100346 | Given Name | Boris |
| Address | Post Office Box 9158 | Family Name | Bodart |
| Zip Code | 33674 | Company | Busch Gardens |
| City | Tampa | Phone | |
| State | Florida | Fax | |
| Country | USA | | |

| Order No. | Purchase Order Date | Delivery Date | Total |
|-----------|---------------------|---------------|--------------|
| 393102 | 11/17/2010 | 11/25/2010 | 4,143,630.00 |
| 393111 | 11/30/2010 | 12/7/2010 | 1,700.00 |

[Orders...](#)
[Smart Connect](#)
[Preview Invoice...](#)
[Preview Delivery Note...](#)

Record: 1 of 4 | No Filter | Search

You have opened a record in a third-party application. Use the Smart Connect button displayed there to call up the document belonging to this record from the DocuWare file cabinet. A Smart Search configuration runs in the background. Entries from the third-party application are used as search words in DocuWare.

DocuWare - Windows Internet Explorer

localhost/DocuWare/Platform/WebClient/Client/Viewer?orgId=1

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USA

Comments and/or special Instructions

| Customer No. | Project No. | Order No. | Order Date | Delivery Date | Invoice No. | Date of Invoice |
|--------------|-------------|-----------|------------|---------------|-------------|-----------------|
| 100346 | 471115 | 393102 | 25.06.2010 | 01.09.2010 | 393102/1 | 26.11.2010 |

| ID | Article | Quantity | Unit Price (USD) | Discount | Amount(USD) |
|----|-------------------------|----------|------------------|----------|-------------|
| 1 | Balwing (St Down) | 1 | 600,000,00 | 0,00% | 600,000,00 |
| 5 | Corkscrew (St Down) | 1 | 540,000,00 | 0,00% | 540,000,00 |
| 3 | Cabra Roll (St Down) | 1 | 600,000,00 | 0,00% | 600,000,00 |
| 15 | Heurline Roll (St Down) | 1 | 420,000,00 | 0,00% | 420,000,00 |
| 28 | Zero-G Roll (St Down) | 1 | 497,000,00 | 0,00% | 497,000,00 |
| 30 | Car (St Down) | 15 | 15,000,00 | 0,00% | 225,000,00 |
| 31 | Car (Stand Up) | 24 | 25,000,00 | 0,00% | 600,000,00 |

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Configuration Options

Smart Search

- Select the file cabinet and search dialog with which the search is to be performed
- Import search words from any area of the third-party application, including tables
- Use additional pre-defined search words
- Run Smart Search from the Smart Connect button integrated in the third-party application, using a shortcut or via the tray menu of DocuWare Desktop Apps

Smart Index

- Index during document archiving or as post-indexing of documents already archived
- Import index words from any area of the third-party application, including tables
- Use additional pre-defined index words
- Run Smart Index from a menu in the DocuWare store or info dialog



This document can also be found here:

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

For more information please visit our website at

www.docuware.com