



DocuWare and StapleWare Modules

DocuWare Modules:

DocuWare provides tools that allow documents to be processed in different ways based on where the documents are produced and who needs to use them.

1. **DocuWare AutoIndex** - allows all patient demographic data to be automatically synchronized between the Patient Accounting System and the documents stored in the Medical Record File Cabinet. By synchronizing the metadata every document will be cross referenced to every other related document in the medical records file cabinet.
2. **DocuWare Active Import** - constantly monitors network subdirectories for new files. When a file is scanned from remote location (digital copier) the file will be converted to a DocuWare TIFF image and moved to a DocuWare basket or File Cabinet. This is used to enable documents to be scanned from your Canon digital copiers directly to DocuWare.
3. **DocuWare Integration** - doctors and nurses are interested in accuracy of information and obtaining the information quickly. The most efficient way to accomplish these two objectives is to provide integration between the Patient Accounting System and the DocuWare Integrated Document Management System. DocuWare 5.1b provides for this integration within the DocuWare Administration Console, so DocuWare can integrate with any patient accounting system that has the ability to run a script that will initiate the search within DocuWare. With integration the current procedures and the current workflows in the hospital can stay in place which reduces training time and increases employee acceptance of electronic images as a replacement for paper medical records.
4. **DocuWare Fulltext** – allows a workflow to run on a schedule to OCR and index every word of every page of every document in the file cabinet. This is extremely valuable when hospital staff is required to find patient information quickly.
5. **DocuWare Report Management System (COLD)** - allows the capturing, indexing and storing of print spool files directly from Patient Accounting Systems.
6. **DocuWare Recognition** - each document that is scanned must be identified by the account number, document type and date in order to allow doctors and nurses to quickly and accurately find the information that they need at the point of patient care. Recognition, in conjunction with the StapleWare® Basket Appliance, will allow medical record charts to be stored by patient account number, and separated by document type.
7. **DocuWare Tiffmaker** - allows documents that are printed in the hospital to be printed directly to the electronic medical record file cabinet. In some cases these documents must also be printed to paper so that doctors, nurses or patients can have an additional copy. The Tiffmaker is unique in that it allows for documents to be printed and simultaneously stored in the electronic record.
8. **DocuWare Content-Folder** – creates a folder or shortcut on the desktop for faster workflow and quick access to filed documents. Multiple documents can be bundled together by patient type, physician, project or process, and Content-Folder creates links to these documents that automatically update to show new and altered documents. Users can customize their folder design by adjusting the font, style, size, and color of each column. Additionally, Content-Folder can be stored as a mail, calendar, task or contact item in Microsoft Outlook. Coders can group the charts that they need to code by



service type or any other criteria, and have quick access to only the charts they need to code. Similarly, doctors can group together medical records that they need to review before signing off on them to finalize the chart.

9. **DocuWare Request** – create an autonomous file cabinet that is portable, to be shared with others who do not have DocuWare. Sharing information is easy, by creating a self-contained read-only version of DocuWare on CD or DVD. No software installation is required for the person who receives a DocuWare Request CD or DVD—it's as simple as inserting the disc into the computer. Also, the CD or DVD can be password protected. Physicians who want copies of several patient charts can be given the DocuWare Request disc, as well as Insurance Providers and Legal Departments who request a Release of Information (ROI) for certain patients.
10. **DocuWare Internet-Server** – a read-only client for retrieving and viewing documents, the Internet-Server provides DocuWare access to Intranet/Internet users via any web browser. The Internet-Server does not require any installation on the client workstation, and employs the same password protection as the full DocuWare client. This module is required for using the StapleWare® Meditech PCI Integration module.
11. **DocuWare Validation** – validate or run a plausibility check on index entries entered or modified. Select a class for checking the plausibility of entries between each other when a document is edited or stored. Validate from an external database or file to ensure validity of data entry, manage dependencies of the entries, and eliminate data entry error.
12. **DocuWare Disposition Scheduling** – allows tasks to be configured that automatically delete documents in the file cabinet that are no longer needed, based on certain criteria. Disposing of documents after a specific retention period can be just as important as storing them. In addition, DocuWare can export or archive the documents to another file cabinet, to the file system, or to CD or DVD for archiving.
13. **DocuWare Linked Documents** – links provide an easy way of displaying documents related to a single document, either in a result list or in the DocuWare client viewer. For example, a single check can pay multiple invoices. Rather than attaching the scanned check with the multiple invoices it has paid, a link can be created between the invoice and the check based on the check number. Since the invoice will be associated with the check number that has paid it, each invoice can be linked back to the check that paid it. Similarly, medical records and insurance cards can be linked based on the patient's medical record number.
14. **DocuWare Mobile Synchronization** – allows mobile users or remote branches to store documents to the local workstation in a file cabinet that is then synchronized with the server. This allows mobile users to store and index the documents they need while away or disconnected from the network. Mobile users can then return to the network and synchronize their documents with the server. Remote branches can store documents locally until synchronizing on a schedule during low bandwidth usage times.
15. **DocuWare Stamps** – allows users to digitally stamp your documents. Public stamps can be created be assigned to groups of authorized users who can make use of them. Private stamps are available for individual users who need their own personal stamp and cannot be assigned to other users. Stamps can be password protected, can require input of data from the user, and can update index values for a document to create a workflow.
16. **DocuWare Web Client** – read/write functionality and performance previously only available with the full Windows client. It allows users to quickly access the documents,



without the need to install additional software or plug-ins on their local PC. Through the web browser, authorized users can get quick access to any document, from anywhere in the world.

17. **DocuWare Link** – transfer index words into DocuWare storage menus from most applications. Fields from the host application are mapped with DocuWare Link, and matched with the corresponding fields in the DocuWare file cabinet. Users can key from the image on their computer, by bringing up the scanned image in DocuWare, typing the information into their accounting system, pressing a function key or button, and indexing the document they are viewing in DocuWare. The document is then stored without having to type in the same data twice. Reversely, users can have direct access to filed documents from other applications with the click of the button, allowing Link to be utilized as a storage or a retrieval tool. It is also compatible with Windows and DOS applications, as well terminal emulations.
18. **Electronic Signatures** -DocuWare provides a facility for signing documents with an electronic signature which is done with DocuWare Stamps. You can select from a number of different types of electronic signatures with different legal and technical requirements. Qualified electronic signatures require that the signatory, i.e. the person affixing the DocuWare stamp, has a "qualification certificate". This certificate serves to identify the owner beyond any doubt. For a qualified electronic signature it is mandatory to have this certificate. The certificates are issued and their validity guaranteed by a Trust Center (a Certification authority).



StapleWare Modules:

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The StapleWare® Modules have been created to enhance the functionality of the DocuWare Integrated Document Management system. Each module was written with a specific customer application in mind and expanded to incorporate features that our clients felt would be useful. These modules are written in Visual Studio.Net and are compatible with the DocuWare Version 5.1b platform.

1. **StapleWare® Autologoff** – (Installed on client PC) allows any DocuWare client station to be terminated after a period of inactivity. The concurrent license is release to the license pool.
2. **StapleWare® Barcode** – (Installed on client PC) allows hospitals to create cover sheets for their medical records from any of the patient demographic data that is available. This completely automates the identification of each medical record, and eliminates inconsistency caused by data entry. Barcodes can also be created using a Zebra Label printer which allows barcodes to be created immediately before documents are scanned.
3. **StapleWare® Basket Appliance** (Server Program with a Server license if full text is used, otherwise it is a Client Program with unlimited license) allows documents in a DocuWare Basket to be processed automatically. Features include Blank Page Dropout, Convert PDF to TIFF, Print to Printer, Phrase Identification, Processing of Multiple Recognition templates, Keep Entries when Filing, Automatic storage to a basket or file cabinet.
4. **StapleWare® Deficiency Manager** (Installed on client PC) allows users to view documents in the file cabinets with select lists created with the DocuWare Administration tool. By creating select lists the Deficiency Manager allows a user to click on a name or number and see the entire group of documents that all have that name or number in common.
5. **StapleWare® Disk Reporter** – (Server program with a server license) will calculate the volume size of any folder or folder structure in the Windows environment. Specifically it is used to automatically calculate the volume sizes of DocuWare file cabinets on a SAN or RAID device.
6. **StapleWare® Export to FTP** (Server Program with a Server license) allows documents in a file cabinet to be exported to Windows folders, network folders or FTP sites. Metadata from the file cabinet can be used for the file name at the file level.
7. **StapleWare® Desktop Integration Tool** (Installed on client PC) is designed to integrate the DocuWare client or, Insurance Card Manager with any software application that allows copy to clipboard functionality. Simply highlight text in the program and press an assigned function key to access documents that have been stored in a DocuWare file cabinet. The function keys are assigned functions within the Retrieval configuration tool. The configuration tool assigns a field



within a file cabinet. When the function key is pressed the highlighted text is used as search criteria. A DocuWare Result List returns a list of all the documents in the file cabinet that match the search criteria. This tool allows any software program to be “image-enabled”, allowing users to have access to the documents in DocuWare directly from the software program they are comfortable using.

8. **StapleWare® IS Integration Tool** – (Installed on client PC) is designed to integrate a third party program to the DocuWare Internet Server. Simply highlight text in the program and press an assigned function key to access documents that have been stored in a DocuWare file cabinet. The function keys are assigned functions within the Retrieval configuration tool. The configuration tool assigns a field within a file cabinet. When the function key is pressed the highlighted text is used as search criteria. A DocuWare Result List returns a list all of the documents in the file cabinet that match the search criteria.
9. **StapleWare® Notification Management** (Server Program with a Server license but it can be used on client stations for pop-ups) allows an alert to be sent to an email address or group of email addresses based on document in a DocuWare file cabinet. The email will be sent based on field values of the documents in the file cabinet. The field values may be updated or changed when the document is stored or with Content Folder, AutoIndex or the “I” button in the result list. If AutoIndex is used to change the field values then dates in the future or dates in the past may be used to update the values that will be monitored by Notification Management.
10. **StapleWare® On-Guard** (Server Program with a Server license) is a module that constantly monitors the DocuWare/StapleWare services. This module allows customizable notifications to be sent to a user or group of users in the event one of the services experiences an interruption in performance.
11. **StapleWare® Recognition** – (Installed on client PC) Allows barcodes to be read from TIF images, JPG (B/W and Color), PDF documents and PNG files. Recognition may be utilized in conjunction with the StapleWare Basket Appliance.
12. **StapleWare® Remote Capture** – (Server Program with a Server license) captures documents from remote locations or branches on an automatic schedule, and, using DocuWare or StapleWare Recognition, indexes and stores the documents in DocuWare. The automated scheduling is ideal for capturing documents during slow internet traffic times so that the bandwidth is not compromised during regular business hours. It also allows the documents to be stored centrally so that all locations have access to the documents, regardless of where the document was received. Remote labs and radiology facilities can easily access and share patient orders, allowing the patient to choose which service location is most convenient for them. Remote capture will also import documents stored in Microsoft Windows folders along with the folder names.
13. **StapleWare® Stapler** (Server Program with a Server license) allows documents inside of a DocuWare file cabinet to be stapled together based on field values in the DocuWare file cabinet. The Stapler function automatically staples documents together inside of a DocuWare file cabinet



that have the same index values. This means that if the unique document field is “Invoice Number” then all invoices with the same number will be stapled together even if they have been scanned as individual pages.

- 14. **StapleWare® Version Control** – (Installed on client PC) The DocuWare client allows documents that are stored in a DocuWare file cabinet to be checked out and locked for editing by other users. The current user then has the ability to update the document in the basket. Version Control allows the user to determine if the revised document will be checked back into the file cabinet with a new version number, or the user may also cancel the operation, or check a new document into the file cabinet from the file system and replace the document in the basket.*

- 15. **StapleWare® WEB Client Integration Tool** – (Installed on client PC) is designed to integrate the DocuWare WEB client with any software application. Simply highlight text in the program and press an assigned function key to access documents that have been stored in a DocuWare file cabinet. The function keys are assigned functions within the Retrieval configuration tool. The configuration tool assigns a field within a file cabinet. When the function key is pressed the highlighted text is used as search criteria. A DocuWare Result List returns a list in the Internet Explorer of all the documents in the file cabinet that match the search criteria. This tool allows any software program to be “image-enabled”, allowing users to have access to the documents in DocuWare directly from the software program they are comfortable using.*