

Connect to Outlook

Product Info



A strong team: DocuWare and Microsoft Outlook

Use Connect to Outlook to archive your emails directly in DocuWare from MS Outlook. It is just as easy for you to access archived emails, for example if you want to quickly return to the latest email from a customer. Emails and attachments are also available to employees in the central document pool.

Throughout a typical working day, hundreds of emails can come flooding in. They are an important part of your work and you need to be able to access them at all times. As business correspondence, emails are also subject to legal retention periods and then they must be archived.

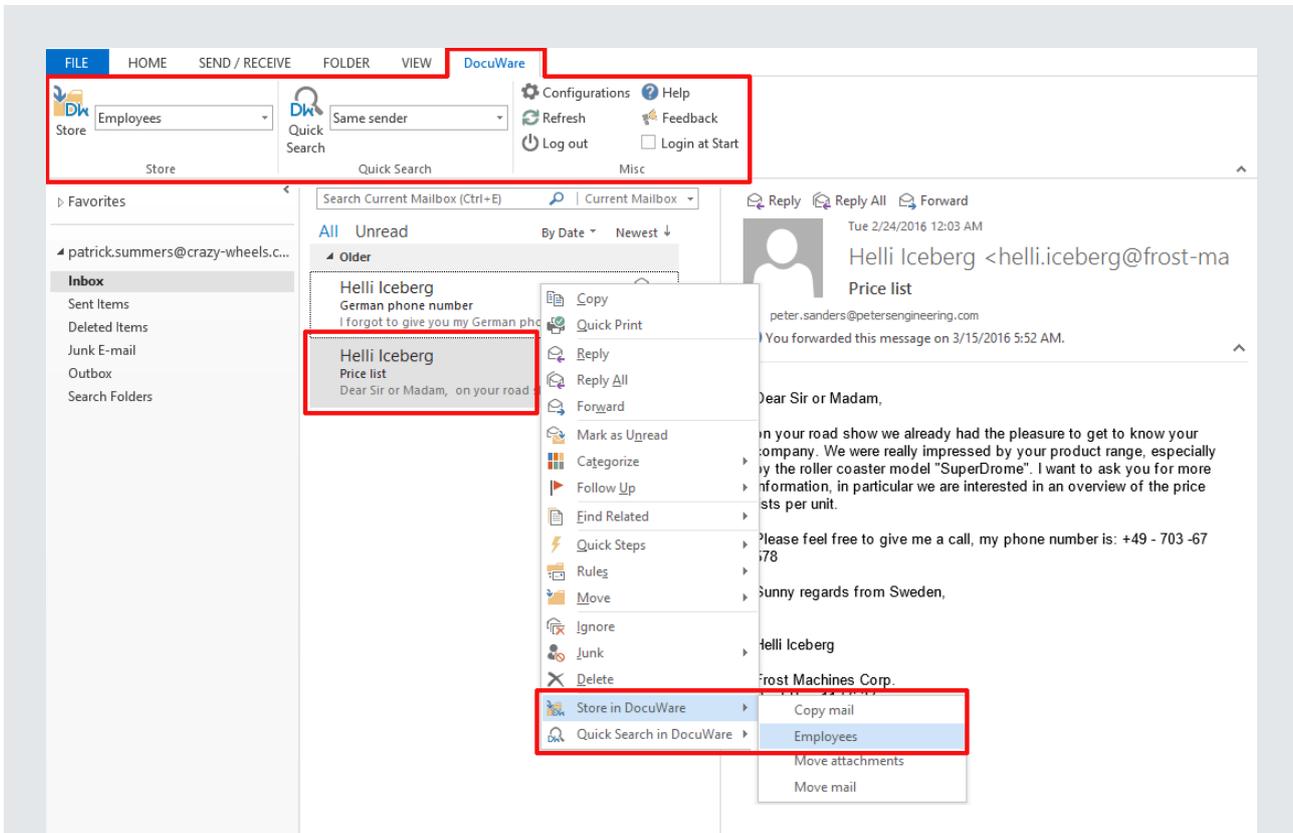
Connect to Outlook, the connection from MS Outlook to DocuWare, allows you to do both: Not only can you archive your emails in an audit-compliant manner directly from Outlook, but you can also use the quick search feature to access stored emails directly.

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

Convenient Email Archiving

DocuWare integrates seamlessly into your usual Outlook setup with its own menu bar and context menu. To store an email, select it and then click the storage configuration with the store target and indexing. If you want, a store dialog opens, which shows you what index words will be stored with the email. Thanks to indexing, emails in the document pool are easy to find again – read more about indexing below.



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.

You can send and archive your emails simultaneously with the "Send and store" button. This applies to new emails and emails that you reply to and forward.

Things are even easier when automatic archiving is set up for incoming emails. For example, a team leader regularly receives invoices, which are moved to the "Invoices" folder via a forwarding rule. DocuWare can watch this folder and its subfolders, and automatically save incoming invoices to a file cabinet.

In many organizations, employees' Outlook accounts are limited in terms of their size. Archived emails can be moved into the file cabinet, ensuring that the Outlook inbox doesn't get cluttered. Particularly important emails that you would like to keep in your inbox can be marked as stored with the "DocuWare" category in Outlook.

Precise Indexing for Speedy Retrieval

Thanks to indexing, archived emails and attachments can quickly be displayed again in Outlook. For example, if you have an email from the company Peters Engineering in front of you, you can bring up all the emails received from employees of this company with a click of the mouse. You can also limit this to a certain period, e.g. the last 30 days.

The results of a Quick Search are shown at the bottom in the Outlook window.

Type	Company	Contact	Document Type
Letter in	Flying Tom Germany	Thomas Rain	Letter in
Contract	Flying Tom Germany	Thomas Rain	Contract
Letter in	Flying Tom Germany	Thomas Rain	Letter in

In addition to archived emails and attachments, you can also display a list in Outlook, i.e. a search with fixed search terms. For example, a list may contain current documents in need of processing, which you can access directly from Outlook.

You can set up the indexing of emails to suit your requirements. Email properties like sender, recipient, date, and subject, are used for automatic categorization and indexing. Names of persons and companies can be supplemented with information from address books and other databases. This might be your Outlook contacts, your DocuWare file cabinets, or your CRM or ERP, i.e. any databases that are queried by SQL. Connect to Outlook connects directly with the desired database.

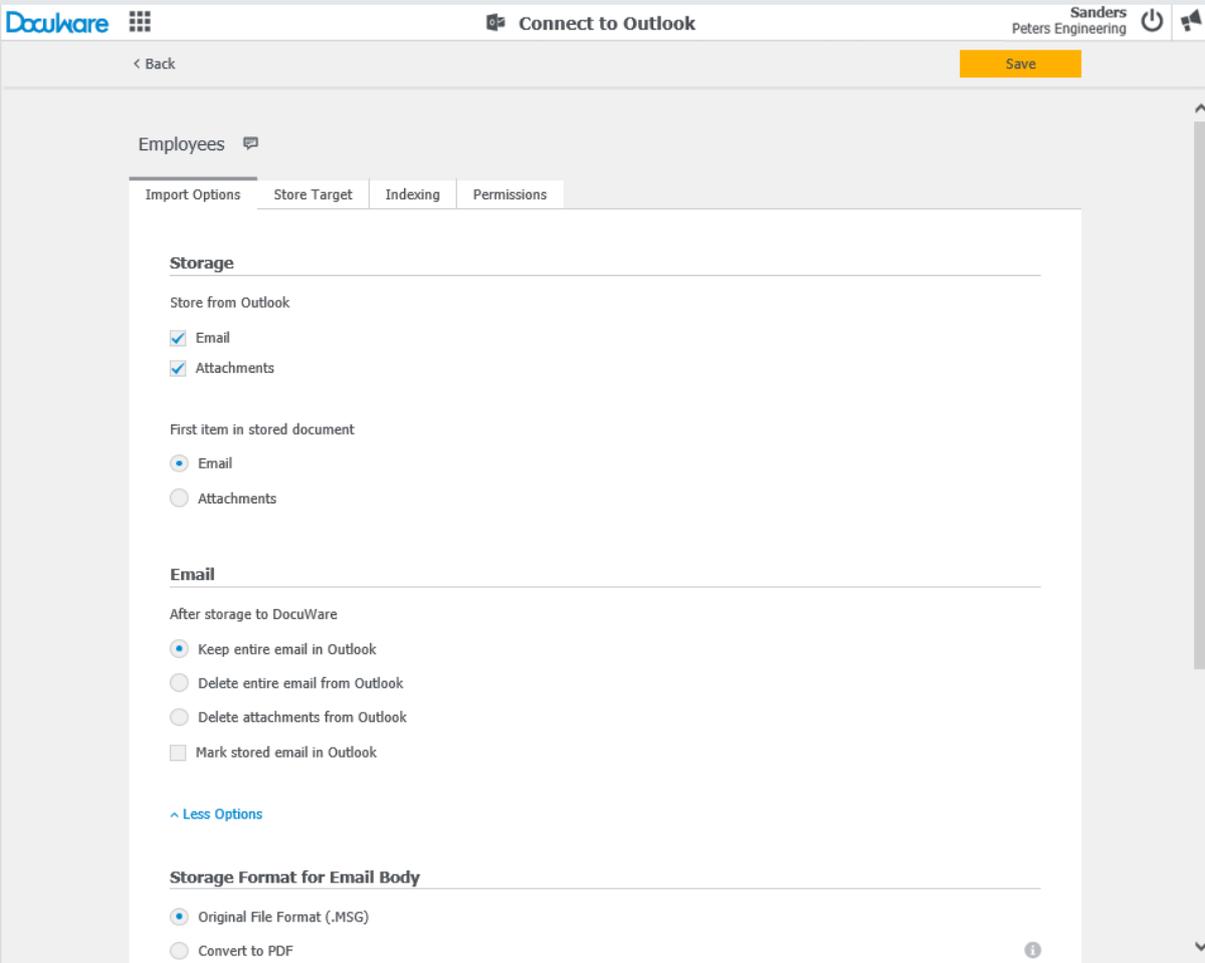
Optimized Customer Service Thanks to Central Information Pool

Regulated archiving with DocuWare also ensures better customer service. Because once the emails are stored in a central document pool, they are available throughout the entire organization – provided users have the right permissions, of course. Information from email correspondence with customers will then be accessible even when the employee responsible is absent. Queries or requests from the customer can continue to be processed promptly.

With DocuWare, you can also give your customers the option to send invoices in the practical ZUGFeRD format. ZUGFeRD is an invoice format applicable to Germany, which allows automatic or semi-automatic posting of invoices. Connect to Outlook recognizes invoices in the ZUGFeRD standard and indexes them automatically. The invoice data can then easily be processed further in DocuWare and your financial software.

Behind the Scenes: Configuring Connect to Outlook

Email archiving and email quick search are based on configurations available to users with the relevant permissions in Outlook via the DocuWare menu bar and context menu. A new configuration can easily be created directly from Outlook. In such a configuration, you will need to specify the store target, the indexing, and permissions, among other things. You can also specify many other details, for example whether archived emails are deleted from Outlook, or whether emails should be stored as MSG or PDF (PDF/A long-term archiving format in accordance with ISO standard). Attachments are archived in their original format.



The screenshot displays the 'Connect to Outlook' configuration interface. At the top, the DocuWare logo is on the left, and the user 'Sanders Peters Engineering' is on the right. The main content area is titled 'Employees' and features four tabs: 'Import Options', 'Store Target', 'Indexing', and 'Permissions'. The 'Import Options' tab is selected, showing the following settings:

- Storage**
 - Store from Outlook
 - Email
 - Attachments
 - First item in stored document
 - Email
 - Attachments
- Email**
 - After storage to DocuWare
 - Keep entire email in Outlook
 - Delete entire email from Outlook
 - Delete attachments from Outlook
 - Mark stored email in Outlook
 - [^ Less Options](#)
- Storage Format for Email Body**
 - Original File Format (.MSG)
 - Convert to PDF

A yellow 'Save' button is located in the top right corner of the configuration area.

You can set up email storage in the DocuWare Configuration in four easy steps. In this window you set up among others the store format and specify whether the email and their attachments should be kept in Outlook after they have been stored.

System Requirements

Connect to Outlook is a component of DocuWare Cloud and is available for On-Premise systems as an add-on module for PROFESSIONAL and ENTERPRISE servers. The 2010, 2013, and 2016 versions of Microsoft Outlook (both 32 and 64 bit) are supported. The general DocuWare system requirements also apply.



This document can also be found here:

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

For more information please visit our website at:

www.docuware.com