DRIVVE | DM

Full Specification

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Specification Drivve | DM Document Management

Document search

- Full text search
- Search for index fields
- Search using criteria such as contains and starts with
- Search for date ranges
- Search using criteria such as Created at, Document date, Filing path, Barcode etc.
- Complex searches: Combination of multiple search criteria
- Saving simple and complex searches to execute a search at a single click

Document overview

- Result list of a document search
- Overview of deleted documents as well as documents recently created and recently used
- Overview of all documents currently edited
- Sorting of the search results
- Thumbnail view
- Overview shows whether there are related workflow tasks and notes for a document
- Fields in overviews can be freely configured

Views

- User-defined navigation for documents
- Possibility to display documents for different target groups

Document view

- Preview of documents with the following formats: Office formats, Image, PDF, Email (MSG, EML), XML and CSV
- Adjustment of width and height
- Full screen view
- Document rotation
- Zoom function
- Scrolling from page to page
- Display of index data for each document
- Possibility to select Office documents (Word, Excel, PowerPoint) in Drivve | DM and directly open them in the corresponding Office application

Document history (Journal)

- Chronological log of all document actions
- Display of action type, username and date the action was performed at

Archiving of documents

- Archiving via archiving page in the user interface
- Comprehensive archiving of documents:
  - from the file system
  - using monitored folders
  - from Microsoft Office applications (Word, Excel, PowerPoint)
  - using the Drivve | Image Scan Client for Drivve | DM (archiving of scanned documents)
- Archiving of emails and email attachments from Microsoft Outlook

- Fulltext indexing (via OCR) during the archival of documents, support of formats such as PDF, email and image formats
- Indexing during archival
- Definition of mandatory index fields (indicated by a frame surrounding the index field) that have to be populated during archival
- Filing the document to be archived in an inbox

Filing documents
- Filing documents in configurable filing structures (cabinets, drawers, folders, binders)
- Definition favorites for filing paths
- Assigning documents to spaces (for example project spaces, customer spaces, supplier spaces)

Document permissions
- Permissions based on filing structures
- Filing path permissions for single users and groups
- Filing path permissions determine the actions available for the documents within a filing path:
- Reading documents, downloading documents (including printing and sending via email) or editing index data

Editing documents (check-in/check-out)
- Blocking documents checked out to prevent other users from editing
- Direct check-in/check-out from Microsoft Office applications
- Automatic versioning: If a document is checked in, a new version of the document is created

Clipping
- Clipping functionality for documents which a common context.
- Easily find related documents
- The clipped documents are displayed in a separate panel
- Additional documents can be added to existing clippings

Retention periods
Prerequisites: To use this function, the Drivve | DM Retention Time Check Job has to be configured (see Specification Drivve | DM Drivve | Jobs - Basic Module).
- Defining retention periods for document types
- Deleting documents if their retention period has expired
- Definition of periods during which documents with expired retention period can be accessed
- Possibility to define that retention periods may only expire at the last day of the month
- Email notification in the case documents with expired retention period are deleted

Indexing of documents
- Freely definable index fields
- Indexsets: Display of index fields based on freely definable criteria such as document type
- Simultaneous indexing of multiple documents

Enumeration ODBC
- Allows querying an external database for indexing in Drivve | DM

Sending documents
- Sending documents via email - as attachment or as URL to the document in Drivve | DM

Document access for non Drivve | DM users (public sharing)

- Creating URLs which can be used by non Drivve | DM users to download documents from Drivve | DM
- Restricting the access of publicly shared documents to a definable period
- Overview of all documents publicly shared by a single user
- Overview of all documents publicly shared
- Amount of documents which can be publicly shared is restricted to 5 GB
- The following details will be shown for shared documents:
  - Document name
  - Date at which the document has been shared
  - Date the access to the share document expires
  - User having shared the document

Document import

- Import of documents located on the hard disk of your computer (see Specification Drivve | DM Drivve | Jobs - Additional Module Import)
- Import of emails an email attachments (see Specification Drivve | DM Drivve | Jobs - Additional Module Email)

Time controlled document export

- Export of index data from documents in Drivve | DM in a CSV file for further processing by third-party systems or for reporting purposes (see Specification Drivve | DM Drivve | Jobs - Basic Module)
- Export of documents from Drivve | DM (see Specification Drivve | DM Drivve | Jobs - Additional Module Integration)

Export of Result Lists

- Result lists from documents may be exported
- Export to a CSV file
- The export provides the option to quickly evaluate your data, e.g. in Microsoft® Excel.

Synchronization

- Server-based synchronization between folders of the file system and Drivve | DM (see Specification Drivve | DM Drivve | Jobs - Additional Module Integration)
- User-defined document synchronization between Drivve | DM and the local hard disk (for example the hard disk of a laptop)

Integration of third-party systems

- Adding data from an external data source to documents (see Specification Drivve | DM Drivve | Jobs - Additional Module Integration)
- SAP ByDesign Integration (see Specification Drivve | DM Drivve | Jobs - Additional Module SAP ByDesign)

Specification Drivve | DM Space Management

Space search
- Full text search
- Search using criteria such as space name, created at, space type, space number etc.
- Search using index terms
- Complex Search: Combination of multiple search criteria
- Saving simple and complex searches in order to execute them at a single click
- Creating fields for searching spaces

Space overview
- Overview of spaces recently created
- Overview of spaces recently used
- Overview of deleted spaces
- Determining the columns displayed in the space overview

Space view
- Display of space details such as space type, space status, address data etc.
- Possibility to define fields for space details
- Display of subspaces
- Display of assigned workflows
- Display of assigned documents
- Searching documents within a space

Space history (Journal)
- Chronological log of all actions referring to a space
- Display of the type of action, user having performed the action and the date the action has been performed

Creation of spaces
- Manually creating spaces
- Automatic creation of spaces (see Specification Drivve | DM Drivve | Jobs - Additional Module Import)
- Defining space fields

Permissions on spaces
- Specifying the users/groups having access to a space
- Specifying the users/groups having the right to edit certain space fields

Space actions
- Assigning archived documents to a space
- From within the space view: Simultaneously archiving new documents in Drivve | DM and assigning them to the selected space
- Creating a URL for accessing a space
- Sending a space URL via email
- Creating space notes
- Deleting spaces
- Restoring deleted spaces
- Structuring spaces into subspaces

- Conditions for space actions: Performing space actions (editing space fields, starting workflows for spaces) if triggered by configurable conditions (see Specification Drivve | DM Drivve | Jobs - Additional Module Processes)

Space import
- Import of spaces from an ODBC database or a CSV file to Drivve | DM
- Assigning static field values to imported spaces

Export of Result Lists
- Result lists from spaces may be exported
- Export to a CSV file
- The export provides the option to quickly evaluate your data, e.g. in Microsoft® Excel.

Space synchronization
- Automatic synchronization of spaces with external data sources. Either CSV files or an ODBC data source may be used.
- Automatic creation of spaces for customers from SAP ByDesign not having corresponding spaces in Drivve | DM (see Specification Drivve | DM Drivve | Jobs - Additional Module SAP ByDesign)
- Automatic creation of spaces for sales orders from SAP ByDesign not having corresponding spaces in Drivve | DM (see Specification Drivve | DM Drivve | Jobs - Additional Module SAP ByDesign)
- Automatic creation of spaces for suppliers from SAP ByDesign not having corresponding spaces in Drivve | DM (see Specification Drivve | DM Drivve | Jobs - Additional Module SAP ByDesign)

Specification Drivve | DM Workflow Management

Prerequisites: For the functionalities described below the Drivve | DM Workflow license is required.

Searching workflows
- Simple searches using criteria such as owner, subject, status etc.
- Complex searches: Combination of multiple search criteria
- Saving simple or complex searches in order to execute at a single click

Creating workflows
- Manual creation of workflow for spaces and documents
- Creation of workflows triggered by configurable conditions (see Specification Drivve | DM Drivve | Jobs - Basic Module)
- Creation of workflow templates
- Duplication of workflow templates
- Definition of due date, reminder and priority
- Definition of workflow tasks including the assignment to users or groups
- Creation of workflow notes
- Use of templates for workflow notes

Display of workflows/workflow tasks
- Overview of all workflow tasks of a single user
- Overview of the workflow tasks of selected users (requires a corresponding right)
- Graphical display of the complete workflow

- Display of workflow details such as creation date, due date or priority
- Display of the notes of a workflow
- Graphical marking of workflow tasks already claimed and workflow task not yet claimed
- Colored marking of overdue workflows within the workflow task overview
- Display of the history of document assigned to a workflow - from inside the workflow view

Configuration of the display of workflows/workflow tasks
- Selection of the fields available in the workflow details
- Selection of the available columns and the column order within the task overview

Workflow actions
- Substitute function allows processing of a workflow during the absence of the user responsible for the workflow
- Automatic distribution of workflows
- Creation of tasks within workflows already claimed
- Possibility to end a workflow manually or to rewind the workflow to the previous user within the workflow
- Workflow notification service via email
- Assigning documents and spaces to a workflow
- Creating workflow notes

Export of Result Lists
- Result lists from workflows may be exported
- Export to a CSV file
- The export provides the option to quickly evaluate your data, e.g. in Microsoft® Excel

General Functions

Dashboard
- Quick overview of your important documents, spaces, and workflows
- Can be configured individually by each user

Switch Entities
- Switch between entities without logging out
- Choose entities from drop down list (no logout necessary)
- Only for Drivve | DM on premise available

Specification Drivve | DM Administration

Program administration

Administration of index fields and columns for documents
- Creation of user-defined index fields for documents
- Configuration of the order in which index fields are displayed
  - in the index panel
  - within the drop-down list of the search field
  - on the archiving page
- Definition of columns for the document result list

- Definition of conditions to display a set of index fields (index sets)
- Definition of different index field types such as date, drop-down list or currency

Administration of index fields and columns for spaces
- Creation of user-defined index fields for spaces
- Configuration of the order in which the index fields are displayed
  - in the index panel
  - within the drop-down list of the search field
  - on the page for creating spaces
- Definition of columns for the spaces result list
- Definition of conditions to display a set of index fields (index sets)
- Definition of different index field types such as date, drop-down list or currency

Creation and administration of workflow columns
- Definition columns for the workflow overview

Administration of document types and space types
- Creation of document types
- Creation of space types including space statuses per space type
- Creation of retention periods for document types
  - Definition of retention periods per document type: After the expiration of a retention period, the documents of the respective document type are deleted
  - Definition the of the time documents remain in the trash bin after the expiration of their retention period
  - Definition that retention periods may only expire on the last day of the month
  - Definition that the settings of the retention period also apply for those documents archived before the last change of the retention period settings

Administration of filing structures and assignment of permissions to filing structures
- Definition of filing structure using the filing objects cabinets, drawers, folders and binders
- Selection of the users/groups having access to the files of a filing path
- Restriction of the user/group access to
  - reading documents
  - downloading documents
  - modifying index data

Role-base rights administration
- Creation of rights (roles) based on a rights template
- Rights template consists of functional rights grouped according to the following sections: Documents, Spaces, Journal & Notes, Workflows, Administration
- Assignment of rights to users

User administration
- Microsoft Active Directory integration including automated login via Single Sign-on (NTLM)
- Integrated user administration
- LDAP synchronization of users

Group administration
- Creation and administration of groups
- Assignment of users to groups

- Use of groups:
  - Assignment of the access to the documents of a filing path
  - Assignment of workflow steps
- Overview of all groups including the number of users per group

Administration of space permissions
- Selection of the user/groups allowed to modify a space index field

Administration of email address books
- Creation of email address books based on internal CSV templates
- Download of existing email address books

Administration of text templates
- Creation of text templates for document notes, workflow notes, space notes and emails
- Administration of text templates in different languages
- Determining the users/groups allowed to use a text template

Administration of workflow templates
- Creation of workflow templates
- Determining the users/groups allowed to use a workflow template

User-specific administration

General
- Configuration of the start page (for example display of the last changes, of the inbox or of the archiving page)
- Determining that the file name of document is used as document name when archiving the document
- Specifying the maximum number of hits displayed on a page
- Specifying the number of documents displayed on the Drivve | DM page **Recently used**
- Specifying the number of spaces displayed on the Drivve | DM page **Recently used**
- Specifying the number of spaces displayed on the Drivve | DM page **Recently created**
- Specifying the number of documents displayed on the Drivve | DM page **Last created documents**
- Specifying whether the inbox is refreshed manually or automatically (in configurable intervals)
- Specifying whether the workflow list is refreshed manually or automatically (in configurable intervals)
- Specifying the width of the auto-complete list
- Specifying the start page in the space detail view.

Email signatures
- Creation and administration of email signatures

Substitute function
- Selection of the users/groups acting as substitute for a user
- Selection of the users/groups a user acts as substitute for
- Out-of-office function

Password
- Changing the user password

Digital Signature
- Save a user specific signature image.
- This image may be used for digitally signing a document, if an additional digital certificate is available for this installation.

Specification Drivve | DM Bookkeeper

The Bookkeeper is available from version 8.0 of Drivve | DM. An additional server license is required. With the Drivve | DM Bookkeeper accounting data can be pre-assigned. The account assignment data can be exported to be subsequently posted in your accounting software.
Via a URL, there is a link from the exported data record to the document in Drivve | DM.

Master data maintenance
- Definition of document types or filing types for which an account assignment is relevant, e.g. all bills and credit notes.
- Import of ledger accounts from CSV file possible.
- Definition of the ledger currency. The currency is always valid for all accounts.
- Import of cost centers via CSV file possible. The cost units can be hidden in the account assignment mask
- Import suppliers via CSV file or by linking to Drivve | DM spaces.
- Import of cost units via CSV file possible (optional). The cost units can be hidden in the account assignment mask
- Import projects via CSV file or by linking to Drivve | DM files (optional). Projects can be hidden in the account assignment mask
- Definition of VAT rates and VAT codes.
- Set net / gross as the default for account assignment.
- Define an automatic mapping of default index values to the booking record to prevent duplicate data entry.

Account assignment on the document
- Selection of the creditor by auto-complete. Is the supplier is assigned with a Drivve | DM space and already assigned to the document as a space, the supplier is automatically filled.
- Amount
- Selection of net / gross for the amount. The definition from the master data is preselected.
- Invoice number
- Document date
- Description

Entering the ledger accounts
- Selection of ledger accounts by auto-complete. Split postings with several ledger accounts are possible. Pre-filled are 100% of the amount with the standard VAT rate.
- A posting text can be added per ledger account.
- For each ledger account, an optional cost center, cost unit and project can be assigned.

The account assignment data can be edited until released. After approval, editing is no longer possible.

Export

- Released booking records can be exported manually.
  - o The target format is a generic CSV output as well as a booking batch in DATEV ASCII format.
- Released booking records can be automatically exported via Drivve | Jobs to the DATEV ASCII format.

Permissions

- View Booking Data
- Edit Booking Data
- Release Booking Data
- Manage Booking Data

Specification Drivve | DM Guest Licenses

Drivve | DM guest licenses are available from version 8.0 of Drivve | DM.

The new Drivve | DM guest licenses provide a way to add users with significantly reduced rights. These are suitable for users who want to find documents, audits, sharing documents in the system in project work, and similar scenarios.

The price of a Drivve | DM guest license significantly lower than a full-fledged Drivve | DM CAL user license. For users who only need the rights available for guest licenses, a guest license can be ordered instead of a CAL license.

For the Drivve | DM Guest License a new permission template is available.

The administrator can assign the following permissions to a guest:

Available Permissions

Documents

- Search documents
- Download documents
- Print documents
- Email documents

Journal & Notes

- View audit trail
- View notes
- Add Notes

Spaces

- View Spaces

Booking

- View Booking

Note: Guest licenses as well as workflow licenses are always named users. In contrast to workflow licenses, this is a mixture of NAL and CAL license, thus a guest license does not block a CAL user license.

Specification Drivve | DM PDF Viewer

Drivve | DM in Version 8 provides a PDF Viewer with many new possibilities.

Specification

The following file formats are supported in the browser preview:
pdf, doc, docx, xls, xlsx, ppt, pptx, pps,odg, odp, ods, odt, rtf, txt,msg, eml,bmp, gif, jpg, jpeg, png, svg, tif, tiff, csv, xml, htm, html, shtml.

For all supported formats the following features are available:
- Full view of any document page
- A sidebar with thumbnail views for a quick document overview.
- Mark and copy text within the viewer, if the full text for this document is available.
- Mark text and drag the text into the index panel for quick indexing.
- Full text search within the document, if the full text is available. The search text is marked in the document.
- After a full text search within Drivve | DM, the search is marked within the document.
- Scroll through all document pages.
- Zoom in, zoom out
- Jump to document page
- Turn the page in 90° steps.
- Jump directly to the next document, if the full view was called from a document list

For native PDF documents the viewer provided additional options to create annotations within the document.
- Predefined text and image stamps can be added to the document.
- Predefined text stamps may contain variables like the user name or the date.
- A new document version will be create for text stamps, image stamps and signatures.
- Additional annotations can be added to the document:
- PDF text comments can be created. They are displayed as little bubbles.
- Free text or drawing may be added to the document in different colors.
- Text within the Document can be marked with different colors.
- These additional annotations are saved as a separate PDF Layer. No document version is created for the additional annotations.
- If such a document is downloaded or printed, it can be decided to add the additional layers or not.

Digital signature
- Signature image must be configured in the user-settings
- Add your personal signature image to a PDF document
- If a certificate for a digital signature is provided on the server, the document can be digitally signed with your personal signature.
- The server certificate must be uploaded in the formats p12 or pfx
- With the signature it is possible to verify that the PDF has not been modified after the signature has been applied
- A digitally signed document is marked with a blue signature bar at the top of the document

Specification Drivve | DM Cloud

Physical Environment

- The virtual data centers are located in different fire compartments. Data is backed up on a doubly redundant basis and thus fourfold. The network is 100% redundant, because all systems dispose of 2 network cards connected to a 100% redundant InfiniBand network.
- 24x7 security service
- 24x7 monitoring system, swipe-card access, biometric identification system, intrusion detection technology and video surveillance
- Emergency power supply– 8 diesel engines with an overall performance of 12.800 kVA
- Environmental Monitoring – Host computer environments, including temperature, humidity and power-supply quality, are monitored to identify conditions that might adversely affect the operation of computer equipment and to facilitate corrective action.
- Capacity Planning – Capacity requirements are monitored and future requirements projected, to reduce the risk of system overload.
- Certifications of the data center:
  o ISO 9001
  o ISO 27001
  o PCI-DSS
  o SSAE16 / ISAE3402

Network Management

- Network Monitoring – 24/7/365 security monitoring of the network. Security of computer networks are monitored 24/7/365 and managed to safeguard information and to protect the supporting infrastructure.

Electronic File Access

- Secured Socket Layer – All communication is delivered over an industry-standard encrypted SSL.
- Access Controls – User access to files is strictly granted on permissions basis, which administrators can easily change.

Specification Drivve | DM OCR-Service

Note: For the functionalities described below, the license Drivve | DM OCR-Services is required.
Note: The Drivve | DM OCR-Services are available for Drivve | DM on premise installations only, not for Drivve | DM Cloud.

- Server-based OCR service for the fulltext indexing of documents in Drivve | DM
- Fulltext indexing via OCR is supported for documents with the following formats: pdf, msg, eml, doc, docx, pps, ppt, pptx, xls, xlsx, txt, jpg, jpeg, jpe, png, tiff, tif, pnm, gif
- OCR service checks within configurable intervals whether there are new documents requiring fulltext indexing
- Defining a maximum number of parallel OCR processes
- Defining the maximum size of the cache folder storing the full images and the thumbnails of the documents.

Specification Drivve | DM Drivve | Jobs - Basic Module

Note: For the functionalities described below, the license Basic Module is required.

All jobs can be used both with Drivve | DM installations and Drivve | DM Cloud.

Caution: Depending on the amount of data and the frequency a job is running, jobs can cause a high load on the server.

Drivve | DM Workflow Notification Job

This job monitors modifications within workflow statuses and sends email notifications.

Available functions:

- Sending daily workflow overviews
- Options for sending daily workflow overviews:
  - Defining a time for the daily sending of email notifications
  - Defining the tasks to be included in the daily overview (new, claimed but not due, due and overdue)
  - Defining email subject and email text
  - Specifying the users to whom no daily workflow overview is to be sent
- Email notification for changed statuses within the workflows of the respective user
- Options for email notifications for changed statuses within the workflows of the respective user:
- Specifying the tasks to be monitored (new tasks, due tasks, overdue tasks)
- Defining email subject and email text
  - Specifying the users not to be notified if workflow statuses change
- Automatic actions if the status of workflow task changes:
  - Specifying the workflow templates and the workflow steps to be monitored
  - Specifying the status changes (new, due, overdue, completed, canceled) of the workflow tasks for which actions are to be performed
  - Email notification (Selection of the user to be notified if workflow statuses do change)
  - Changing space fields if the workflow is related to a space
  - Changing document fields for all documents of a workflow

Drivve | DM LDAP Synchronization Job

This job synchronizes users and groups between an LDAP directory and Drivve | DM.

Available functions:

- Specifying LDAP parameters
- Comprehensive synchronization options:
  - Synchronizing users and groups between an LDAP directory and Drivve | DM
  - Synchronizing modifications (nice names, email addresses and department of the respective user) made to users from an LDAP directory with users in Drivve | DM having the same login name
  - Synchronizing the group assignment from an LDAP directory with Drivve | DM allows a central user configuration via LDAP
- Possible email notification after each synchronization containing the following information:
  - All users having been exported to Drivve | DM
  - All users who could not be exported to Drivve | DM
  - All modifications made to those users having been synchronized from an LDAP directory to Drivve | DM

Index Export Job

This job exports index data for spaces, documents or workflows from Drivve | DM into the CSV format.

Possible use case: Further processing by third-party systems or reporting purposes

Available functions:

- Specifying whether index data for spaces, documents or workflows are to be exported
- Defining search conditions for the spaces, documents or workflows to be exported
- Specifying the index fields to be exported
- Selection of field separators for the export file
- Selection of the folder the export file is saved to
- Defining a name for the export file
- Determining whether the file is overwritten with new data or whether the new data is appended within the file
- Possibility to send the export file via email
- Specifying whether new values are assigned to certain fields of the exported data

Workflow Trigger Job

This job starts workflows for documents meeting specified conditions.

Available functions:

- Selection of the workflow template to be used
- Defining search conditions for the selection of documents for workflows are to be started
- Selection of document fields the be used as workflow names
- Determining that only those documents are to be considered having been modified after a configurable date

Drivve | DM Retention Time Check Job

This job deletes documents the retention period of which has expired.

Available functions:

- Verifying the retention periods of documents
- Deleting all documents
  - with an expired retention period
  - for which the period within the recycle bin has been expired
- Email notification on deleted documents
- Automatic start of workflows for documents with an expired retention period
- Automatic modification of index fields for documents with an expired retention period

Record Actions Job

The job executes the following optional actions, if a search condition is met for documents or spaces:

- Send an email with a list of documents or spaces if the search condition is met.
- Update index field values of the matching documents or spaces.

DATEV Export Job

The job exports booking records from Drivve | DM into the DATEV ASCII format.

This file format can be imported again into the DATEV booking software.

Available functions:

- Configuration of the required DATEV properties.
- The export is filtering the records of the current configured fiscal year.
- The exported booking records are set to the status "exported" in Drivve | DM.

Specification Drivve | DM Drivve | Jobs - Additional Module Email

<u>Note</u>: For the functionalities described below, the licenses Basic Module and Additional Module Email are required.

All jobs can be used both with Drivve | DM installations and Drivve | DM Cloud.

<u>Caution</u>: Depending on the amount of data and the frequency a job is running, jobs can cause a high load on the Cloud server.

Email to File System Job

This job saves emails and email attachments from one email mailbox to the hard disc of a computer. Available functions:

- Export of emails (including index data) and their attachments (for example invoices) from an email mailbox into separate folder within the file system
- Support of Exchange, IMAP and Pop3 mailboxes
- After archiving, emails can be deleted from the mail server or moved to another folder
- Options for archived emails:
  - Saving emails as EML files
  - Selection of the folder the exported emails are saved to
  - Extraction of the index data of an email and export of the index data into an XML file
  - Transformation of emails as an XML file into a text-based format using XSLT, selection of the XSLT file to be used
- Possibility to archive email attachments separately in Drivve | DM
- Options for archived email attachments:
  - Saving an email attachment in its original format
  - Selection of the folder the exported email attachments are saved to
  - Possibility to restrict the archiving of email attachments to selected file formats
  - Extraction of index data and export of the index data as XML file
  - Transformation of email attachments as an XML file into a text-based format using XSLT, selection of the XSLT file to be used

Email Archive Job

This job archives emails and email attachments from one or multiple mailboxes in Drivve | DM. Available functions:

- Support of Exchange, IMAP and Pop3 mailboxes
- After archiving, emails can be deleted from the mail server or moved to another folder
- Options for archived emails:
  - Saving archived emails as EML files
  - Indexing archived emails (for example assigning a filing path in Drivve | DM)
- Possibility to archive email attachments separately in Drivve | DM
- Options for archived email attachments:
  - Possibility to restrict the archiving of email attachments to selected file formats
  - Indexing archived email attachments (for example assigning a filing path in Drivve | DM)

Specification Drivve | DM Drivve | Jobs - Additional Module Import

<u>Note</u>: For the functionalities described below, the licenses Basic Module and Additional Module Import are required.

All jobs can be used both with Drivve | DM installations and Drivve | DM Cloud.

<u>Caution</u>: Depending on the amount of data and the frequency a job is running, jobs can cause a high load on the Cloud server.

Drivve | DM Space Import Job

This job imports spaces from an ODBC database or a CSV file to Drivve | DM.

Available functions:

- Determining whether data from a CSV file or an ODBC database are imported
- Defining field separators for the CSV import
- Possibility to assign fields with static values to the imported spaces (for example type "supplier space")
- Assigning fields of the imported data to fields in Drivve | DM

File Import Job

This job imports files with XML meta data to Drivve | DM.

Possible use case: Migration of the data of third-party systems.

Available functions:

- Import of files from the hard disc of your computer to Drivve | DM
- Assigning index fields with fixed values to each file imported
- In the case of file pairs (document and corresponding XML meta file), index fields and their values can be extracted from the XML meta file and the extracted values can be assigned to index fields in Drivve | DM
- After the import: Possibility to delete imported files from the hard disc or move them to another folder
- Possibility to create a CSV log file to be able to document and evaluate errors having occured during the import

Specification Drivve | DM Drivve | Jobs - Additional Module Integration

<u>Note</u>: For the functionalities described below, the licenses Basic Module and Additional Module Integration are required.

All jobs can be used both with Drivve | DM installations and Drivve | DM Cloud.

<u>Caution</u>: Depending on the amount of data and the frequency a job is running, jobs can cause a high load on the Cloud server.

Synchronization Job

This job synchronizes documents or spaces including index data from Drivve | DM with the hard disc of your computer.

Available functions:

- Selection of the target folder on the hard disc
- Determining whether documents or spaces are synchronized
- Definition of search criteria for documents or spaces
- Unidirectional synchronization: From Drivve | DM to the hard disc of your computer

- Optional export of XML meta files for all synchronized documents
- Transformation of XML meta files via XSLT into a text-based format
- Determining actions to be performed after synchronization such as
    o Copying synchronized documents to another folder
    o Deleting synchronized documents from Drivve | DM
    o Modifying index data in Drivve | DM
- Display of all document modifications having been made on the hard disc within a configurable period

ODBC Lookup Validation Job

This job adds data from an external data source to documents or spaces in Drivve | DM.
Available functions:

- Determining whether the data is added to documents or spaces
- Defining criteria for the selection of documents or spaces
- Selection of the data to be returned by the query (result fields)
- Values of result fields can be used as variables or key fields for the SQL query
- Definition of the SQL query to extract the required data from the external data source
- Assigning the selected SQL database fields of the external database to the index fields of documents or spaces in Drivve | DM
- Determining the fields to be changed in Drivve | DM if a result is found for the current data set
- Determining the fields to be changed in Drivve | DM if no result is found for the current data set

Data Export Job

This job exports documents from Drivve | DM to a hard disc.
Available functions:

- Defining search conditions for the documents to be exported
- Specifying whether index fields are exported, selection of the index files to be exported (either all index fields available in the Drivve | DM Management Console or index fields previously selected by the user)
- Optional export of XML meta files for all exported documents
- Optional transformation of XML meta files in a text-based format using XSL
- Selection of the target folder on the hard disc
- Specifying whether after the export new values are assigned to certain Drivve | DM index fields of the exported documents

Specification Drivve | DM Drivve | Jobs - Additional Module Processes

Note: For the functionalities described below, the licenses Basic Module and Additional Module Processes are required.
All jobs can be used both with Drivve | DM installations and Drivve | DM Cloud.
Caution: Depending on the amount of data and the frequency a job is running, jobs can cause a high load on the Cloud server.

Space Conditions Job

This job executes space actions (changing space fields, starting workflow and sending email notifications) triggered by definable conditions referring to documents in spaces.
Available functions:

- Defining conditions for the selection of spaces

- Defining conditions for the documents within the selected spaces
- Possible actions if document conditions are met:
- Changing space fields:
  o Selection of the space fields to be changed
  o Defining the new values of the space fields to be changed
- Sending emails for executed actions:
  o Possibility to use variables within the email (for example for the name of a space)
- Starting workflows for selected spaces:
  o Definition of the name for the workflow to be created using variables (for example the name of a space)
  o Selection of the workflow template to be used

Specification Drivve | DM Drivve | Jobs - Additional Module SAP ByDesign

Note: For the functionalities described below, the licenses Basic Module and Additional Module SAP ByDesign are required.
All jobs can be used both with Drivve | DM installations and Drivve | DM Cloud.
Caution: Depending on the amount of data and the frequency a job is running, jobs can cause a high load on the Cloud server.

SAP ByD Print Queue Archive Job
This job saves documents from SAP ByDesign print queues to the local hard disc.
Available functions:

- Selection of the SAP ByDesign instance
- Selection of the SAP ByDesign print queue
- Saving documents and SAP ByDesign attachments from an SAP ByDesign print queue to the file system
- Selection of the target folder for saving the files

SAP ByD to Drivve | DM Customer Sync Job
This job synchronizes customers from SAP ByDesign with spaces in Drivve | DM.
Available functions:

- Selection of the SAP ByDesign instance
- Creating new spaces in Drivve | DM for all new customers from SAP ByDesign having been created after a definable date
  Note: The Drivve | DM space name can be composed of different SAP ByDesign fields.
- Considering changes of SAP ByDesign fields. Example: If the name of a customer in SAP ByDesign has changed, the job updates the name of the corresponding space in Drivve | DM.
- Possibility to assign the SAP ByDesign fields Phone, Email, Fax, Web address, Address, DUNS Number to Drivve | DM space fields
- Automatic assignment of space permissions:
  o To users and groups in Drivve | DM
  o To the responsible person from SAP ByDesign if the Drivve | DM loginname of this person is stored in SAP ByDesign.

SAP ByD to Drivve | DM Sales Order Sync Job

This job synchronizes sales orders from SAP ByDesign with sales order spaces in Drivve | DM.
Available functions:

- Selection of the SAP ByDesign instance
- Creating new spaces in Drivve | DM for all new sales orders from SAP ByDesign
- Creating a new sales order space as subspace for the space of the SAP customer the sales order is assigned to
- Creating new customer spaces if there is no space in Drivve | DM for the customer the sales order is assigned to
- Automatic change of the space name if the name of the sales order in SAP ByDesign has changed
- Automatic assignment of space permissions to users or groups in Drivve | DM

SAP ByD to Drivve | DM Supplier Sync Job

This job synchronizes suppliers from SAP ByDesign with supplier spaces in Drivve | DM.
Available functions:

- Selection of the SAP ByDesign instance
- Creating new spaces for all new suppliers from SAP ByDesign having been created after a definable date
- Consideration of changes within the attributes of the SAP ByDesign suppliers:
- If the name of a supplier or other attributes of the supplier have changed in SAP ByDesign, the job updates the fields of the corresponding space in Drivve | DM
- Possibility to assign the SAP ByDesign fields Phone, Email, Fax, Web address, Address, DUNS Number to Drivve | DM space fields
- Automatic assignment of space permissions to users or groups in Drivve | DM

Specification Drivve | Image Scan Client for Drivve | DM

Note: For the functions described below, the license Drivve | Image Scan Client for Drivve | DM is required.

- Scanning documents with any scanner supporting the TWAIN protocol
- Possibility to choose between the scan dialog of the scanner or the scan dialog of the Drivve | Image Scan Client for Drivve | DM
- Comprehensive imaging functions such as Deskew and Remove dots
- Preview of the scanned documents
- Indexing scanned documents and archiving them in Drivve | DM

Specification Drivve | DM Desktop Client

- Archiving and indexing documents
  - from Microsoft Office applications (Word, Excel, PowerPoint, Outlook)
  - from the file menu using the context menu ("Send to" menu item)
  - via hotfolder
  - via the Drivve | Image scan client for Drivve | DM (can be used with any scanner supporting the TWAIN protocol)
- Determining the file formats allowed to be archived and indexed via hotfolder
- Bidirectional synchronization of files between Drivve | DM and the local hard disc of your computer

- Multiple authentication options:
  - Login with username and password of the local Drivve | DM instance
  - Login with Windows user (using the Windows User Principal Name as Drivve | DM login name)
  - Login with Windows user (using the Windows username without domain as Drivve | DM login name)
  - Login with Drivve | DM user and Certificate (only Drivve | DM Cloud)
- Silent installation of the Desktop Client possible

Drivve | DM Mobile App for iOS and Android

General
- Multiple logins for cloud or on premise instances can be managed.
- Logout to end the current session.
- Info page to see current information about the app.
- Drivve | DM permissions are also applied in App.

Documents
- Search documents via free search.
- Search documents via saved searches from Drivve | DM.
- See recently used documents.
- Detail view with document properties.
- See notes or add new notes.
- See linked files.
- See linked tasks.
- PDF view for all supported document formats in Drivve | DM 8.
- Share documents as an attachment or as a link. (Also share with other apps).

Upload new Documents
- Share a document on the mobile device with the Drivve | DM App.
- The user may provide the following attributes for the Drivve | DM upload :
  - Document name
  - Filing shortcut
  - User Inbox
  - Workflow Template
- After saving, the detail view of the document is displayed in the app.

Spaces
- Search spaces via free search.
- Find spaces via saved searches from Drivve | DM.
- See last used spaces.
- Detail view with space properties.
- See notes or add new notes.
- See linked documents.
- See linked tasks.
- See sub-spaces
- Share space as link.

Workflows

- See documents of your own inbox.
- See open tasks.
- See detail view of a task
- Accept task.
- Complete task.
- Share task as link.
- See documents of a task.
- See notes or add new notes.
- See linked files of a task.