

# Service Description and Documentation FilesApp

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1 Basics

#### 1.1 How FilesApp works

The FilesApp software offers the possibility of an AI-supported, generic file management system with enterprise search functions, system integration and automation options in one app.

File management is easy and secure with the FilesApp. It can be integrated into existing workflows and processes.

The FilesApp also creates the possibility to implement optimized file management: Digitization and automation are brought to a new level with the FilesApp and at the same time requirements regarding data protection and IT security are met.

Numerous storage systems, e.g. several SharePoint instances can also be connected to the FilesApp, thus enabling the structured storage and retrieval of files in all connected storage systems. The connections to the storage systems are referred to as connections in the FilesApp.

All user and authorization specifications of the connected storage systems are taken over by the FilesApp, so that neither further authorization administration is required nor that users can access files for which they do not have authorization in the storage system.

File management is carried out on the basis of defined document types with their tags and predefined directory and file name conventions, which can be administered individually with the appropriate authorization.

The integrated AI learns about recurring templates based on the files uploaded via the FilesApp and can recognize both document types and the defined tag contents. The users only have to carry out a plausibility check for the recognized contents and assignments and no longer have to spend any effort on the correct directory selection and the assignment of file names. The files can be found via FilesApp after upload.

The files are stored in the storage system defined by the users or the company specifications, the FilesApp does not store any files.

The completely automated storage of files, for example by means of workflows or systems connected via API, is also possible.

Via its API and SDK, the FilesApp enables connection, integration, and automation with corresponding other applications, such as ERP systems, workflow management, and much more. For example, Microsoft SharePoint can be used by the FilesApp as a storage system for a DMS if the system used offers a modern API.

A list of the functionalities and the direct comparison of the product variants can be accessed via <a href="https://filesapp.com/pricing/">https://filesapp.com/pricing/</a> .



- 1.1.1 Upload process by the users
  - 1 The user selects a document type via FilesApp and assigns the relevant tags or has them filled by the AI.
  - 2 FilesApp specifies the directory and file name for storage on the endpoint using the specifications defined for the document type.
  - 3 According to the definitions, the document is stored directly in the defined storage system and directory with the specified file name.





- 1.1.2 Process in the connection of systems
  - (1) When outputting an operation in the system, the user selects the definition with FilesApp in the output control.
  - 2 The tags are generated automatically, and FilesApp specifies the directory and file name for storage on the endpoint using the specifications defined for the operation.
  - 3 The document is stored according to the defined specifications directly in the defined storage system and directory with the specified file name.





## 1.2 FilesApp Features

## 1.2.1 General information about the FilesApp features

The connections to the storage systems are integrated in FilesApp on an API basis. Not all storage system vendors offer the same or full range of functions as implemented in FilesApp.

Technical limitations of a storage system provider, which may affect the range of functions in the use of FilesApp, are specified in the description of the storage system.

Currently, the connections in all FilesApp product variants include the following functional scopes depending on the user rights of the user on the respective storage system:

- Use of clients for all available operating systems
- Integration of all private storage systems that are mapped in FilesApp
- Reading files and directories
- Changing files and directories
- Copying files and directories
- Moving files and directories
- Taking advantage of the ease of uploading files
- Use of Smart Upload
- Use of chat to files
- Insight into the file history
- Search in directories
- Global search for files
- Using Search Views
- Sharing files and directories
- Collaborative work on files

In addition, with the FilesApp Private+ product variant:

Recognition of document types and tag contents by AI

In addition, with the FilesApp Business Basic product variant:

Integration of the booked business connections

In addition, with the FilesApp Business Professional product variant:

- API usage options for connecting other systems (e.g. ERP systems, CRM, etc.)
- Use your own workflows with Microsoft Power Automate



## 1.2.2 Smart Upload

#### 1.2.2.1 Start a Smart Upload

If a file is transferred to the FilesApp via Smart Upload, it starts with an extended range of functions. Document types can be selected. If AI (artificial intelligence) is active or available, document types are suggested and trained tag content is automatically filled. The file can then be uploaded to the directory defined in the document type under the defined file name.

Execution of the Smart Upload:

	+ Newfolder 🛓 Upload			<u>۵</u>	• C	1
$\odot$	Inance X					+
FilesApp			٥	Search in th	iis directory	
Q Global search	C D File name ^	Size ↑↓	File last modifi 🕇	Creato	↑↓ Edited b	y t⊾
Smart Upload	Eingangsrechnungen	6.50 MB	18.10.2022 15:05	SS	SS	
Connections	2022-07-02 Adobe Systems - Rechnungs-Nr. IEE2022007710678 - FAV-Production - 52,06 EUR - Abbuchung.pdf     EAU-9 Eingengeserbaung (ching Worldhow) - Liefergingengemen Adobe Systems - Rechnungsnummer IEE2022007710878	56.80 KB	07.12.2022 22:49	SS	SS	
Computer	2022-12-07 Huber GbR - Rechnungs-Nr. RE10047 - FAV-Production - 17,85 EUR - Überweisung.pdf	121.31 KB	30.05.2023 20:47	SS	SS	
SharePoint DSI-DSM						
OneDrive DSM						
Google Drive						
Max Muster - FAV Pro						
+						

By selecting "Smart Upload" in the upper left area in the desktop app, in the web client or on the tablet.

By drag & drop in the desktop app.



••					
FilesApp					
Q. Globale Suche					
✦‡ Smart Upload					
Connections					
MM - FAV Production					
+	2022-10-06 KMpro - Rechnungs-Nr. 10 2022 4284 - FAV-Production - 267,75 EUR - # FAV-P Eingongsrechnung (ohne Workflow). Eieferantemenne KMpro ochnur				
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	2022-10-01 KMpro - Rectinungs-Nr. 10 2022 4287 - FAV-Production - 267,75 FUR - Abbuchung pdf FAV-P Eingangsreichnung (ohne Workflow) Liefergensprocetter The Doctory	59.90 KB			
	2022-10-01 KMpro - Rechnungs-Nr. 10 2022 4286 - FAV-Production - 287/7 EUR - A FAV-P Engangerechnung (ohne Workflow) Lieferantenname: KMpro Rechnus	59.90 KB			

Or by selecting it in the smartphone app.



A document scan function is also available in the smartphone app.



## 1.2.2.2 Smart Upload process

After starting the Smart Upload, as described in the previous point, FilesApp first displays the storage systems that have been set up.

	FilesApp Demo Rechnung	SharePoint DSI-DSM pr.steinergids-men.com	
		OneDrive DSM Dr.Steiner@ds-men.com	
FAV Production – Musterstraße 23 – 12345, Musterhausen Huber GbR Tannenweg 8	Datum: 08.01.2023	SharePoint FilesApp Dr.Steinergiftesapp.com	
12341 Musterhausen	Rechnungsnummer: RE10048 lechsungsdatum entspricht Liefer-/Leistungsdatum	Dr.Steinergeflesapp.com	
Rechnung		ETC Dr.Steiner@filesapp.com	
Sehr geehrter Herr Meier,			
vielen Dank, für Ihren Auftrag. Vereinbarungsgemäß bei Leistungen:	echnen wir Ihnen hiermit folgende	Google Drive dr.dieter.steiner@gmail.com	
Position         Anzahl         Einheit         Bezeichnung           1         5         Stück         Musterprodukt	Einzelpreis Gesamtpreis 2,00 € 10,00 €	Max Muster - FAV Production MMuster@fav-production.com	
Nettopreis	10,00 €	Select document type	
Zzgl. 19% USt.	1,19 €		
Rechnungsbetrag	11,90 €	Continue without Smart Upload	
Bitte überweisen Sie den Rechnungsbetrag innerhalb vo genanntes Konto. Fürweitere Fragen stehen wir Ihnen sehr geme zur Verf Mit freundlichen Grüßen Max Mustermann	n 14 Tagen auf unser unten ùgung.		

After selecting the storage system, FilesApp suggests the document library.

					nuiy	
		FilesApp Dem	no Rechnung	FAV-P FINANCE - Doc	cuments	
				Please select a document	type	
				۹ þearch		
FAV Production – Musterstraße 23 – 1 Huber GbR	12345, Musterhausen			Dev - Eingangsrech Max Muster - FAV Product	hnung <sub>tion</sub>	
Tannenweg 8 12341 Musterhausen	R	Datum: Rechnungsnumme lechnungsdatum entspricht Liefer-J	: 08.01.2023 er: RE10048	FAV-P Eingangsrec Max Muster - FAV Product	hnung (Workflow)	
Rechnung				FAV-P Eingangsrec	thnung (ohne Workflow)	
				Max Muster - FAV Product		
Sehr geehrter Herr Meier, vielen Dank, für Ihren Auftra Leistungen:	ag. Vereinbarungsgemäß bere	echnen wir Ihnen hierm	nit folgende	Max Muster - FAV Product	oad	
Sehr geehrter Herr Meier, vielen Dank, für Ihren Auftre Leistungen: Position Anzahl 1 5	ag. Vereinbarungsgemäß bere Einheit Bezeichnung Stück Musterprodukt	achnen wir Ihnen hierm Einzelpreis 0 2,00 €	nit folgende Gesamtpreis 10,00 €	Continue without Smort Upl	oad	
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It is possible to manually select a document type or continue the process without Smart Upload.

If you select a document library, the AI document type recognition starts.

Smart Upload Firma Huber Rechnung RE10048.pdf	+
FilesApp Demo Rechnung	Al suggestions     Aver Ellingingerechnung (ohre Workflow)     Huber GBR  Please select a document type
PAV Production – Musterstande 23 – 12345, Musterhausen Huber G&R Tarnenweg 8 Datum: 08.01.2023 12341 Musterhausen Rechnungsnummer: RE10048 Rechnungsnatum enspröt Liefer-Leatungstatum	Q Bearch  Dev - Eingangsrechnung Max Muster - FAV Production  FAV-P Eingangsrechnung (Workflow) Max Muster - FAV Production  FAV-P Eingangsrechnung (ohne Workflow)  Max Muster - FAV Production  FAV-P Eingangsrechnung (ohne Workflow)  FAV-P Eingangsrechnung  FAV-P Eingangsrechnug  FA
Sehr geehrter Herr Meier, vielen Dank, für Ihren Auftrag. Vereinbarungsgemäß berechnen wir Ihnen hiermit folgende Leistungen:	Continue without Smart Upload
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Zzgl. 19% USt. 119 6	
Rechnungsbetrag 11,90 €	
Bitte überweisen Sie den Rechnungsbetrag innerhalb von 14 Tagen auf unser unten genanntes Konto. Für weitere Fragen stehen wir Ihnen sehr gerne zur Verfügung. Mit freundlichen Grüßen Max Mustermann	
	Cancel Upland

The AI suggests possible document types, depending on the level of training of the AI, the suggestions are made. After selecting the appropriate document type, the AI reads the tag content from the document and fills the tags with the content to be transferred.

	FilesApp Demo Rechnung	FAV-P Eingangsrechnung (of Max Muster - FAV Production	hne Workflow)
		Dokumenten-Tags	Lieferantenname
FAV Production – Musterstraße 23 – 12345, Musterhausen		Reichungsdatum 2023-01-08	
Tannenweg 8 12341 Musterhausen	Datum: 08.01.2023 Rechnungsnummer: RE10048 Rechnungsdatum entspricht Liefer-/Leistungsdatum	Rechnungsbeträge Rechnungsbetrag netto	Mehrwertsteuer in Prozent
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Zeel 40% LICh	10,00 €	Überweisung	) (14 Tage
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Mit freundlichen Grüßen		Finanzbuchhaltungsdaten	
Max Mustermann		Finance > Eingangsrechnungen	
		2023-01-08 Huber GbR - Rechnungs-Nr. RE	10048 - FAV-Production - 11,90 EUR - Überweisung.pdf



The user only has to carry out a plausibility check of the tag contents and correct it if necessary. The AI learns with every process and the recognition rate increases with each Smart Upload of the document type.

By clicking on "Upload", the file is uploaded to the storage system defined in the document type.

## 1.2.3 Chat

For each file, the chat function is available in the FilesApp, so that the participants do not have to exchange information via another application, such as an e-mail program.

Open 👻 🖉 Rename file	Delete 🛨 Download 📋 Smart Upl	oad 🚯 Version history	🚯 Tag History < Share	Tags Chat 🛱 Subsci
FAV Production – Musterstraße 23 – 12 Huber GBR Tannenweg 8 12341 Musterhausen	1245, Musterhausen Date Rechnungsnam Rechnungssam	um: 08.01.2023 nmer: RE10048 Jefer-Leistungsdatum	Document type FAV-P Engangurechnung (ohne Workflow) Creator @ M.Mustergifav-production.com	Size 213.01 KB Creation date 06.06.2023 2218
Rechnung			Edited by	File last modified 08.06.2023 22:18
Sehr geehrter Herr Meier, vielen Dank, für Ihren Auftrag Leistungen:	g. Vereinbarungsgemäß berechnen wir Ihnen hi	ermit folgende	Tags edited by	Tags last edited 08.06.2023 22:18
Position Anzahl	Finheit Bezeichnung Finzelnreis	Gesamtoreis		Lieferantenname
1 5	Stück Musterprodukt 2,00 €	10,00 €	RE10048	Huber GbR
Nettopreis		10,00 €	Rechnungsdatum	<
Zzgl. 19% USt.		1,19€	2023-01-08	
Rechnungsbetrag		11,90 €		
Bitte überweisen Sie den Rec genanntes Konto. Für weitere Fragen stehen wi Mit freundlichen Grüßen Max Mustermann	chnungsbetrag innerhalb von 14 Tagen auf uns ir Ihnen sehr gerne zur Verfügung.	er unten	Rechniqueera parto	Méhvestálszer in Prozent 19,00 EUR
wax wustermann	<u>वि</u> स्   दि 🕢		Leistungsdatum oder -zeitraum Leferdatun oder Startdahum Leistungszeitrum 2023-01-08 Zahlungsinformation	Enddatum Leistungszeitraum

Desired users can be addressed directly via the @ sign.





These users receive a mail notification including a link directly to the file in FilesApp in order to be able to enter the chat directly.

In addition, new messages are displayed in FilesApp, the counter at the bell icon on the desktop shows the number of new messages.



#### 1.2.4 History

For every file that is managed via FilesApp, a comprehensive and audit-proof history is available.

The following actions around the FilesApp are documented in the history:

- Creation of the file
- Copy or move a file
- Changes to tag content
- Renaming files

#### 1.2.5 Sharing files and directories

Depending on the range of functions offered by the connected storage system, files and directories can be shared via the share function in FilesApp.

The authorizations and options depend on the respective storage system. Any restrictions are noted in the storage system descriptions.

	🚯 Properties 🙀 Open 👻 🔏 Rename 📋 Delete 🛨 Download 📋 Smart Upload 😔 Version hist		listory		🌲 00 🧆	с 🚳
						+
FilesApp						tory
Q Global search	C File name					Edited by 🛛 🗘
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SharePoint DSI-DSM	2022-10-10 Huber GbR - Rechn     FAV-P Eingangsrechnung (ahl     General Access				SS	SS
	2022-10-06 KMpro - Rechnung         Anyone with the link				SS	SS
Finanzen	Can view but not edit Viewer				SS	SS
	2022-10-01 KMpro - Rechnung:     FAV-P Eingangsrechnung (oh)     Password Protected				SS	SS
Max Muster - FAV Pro	2022-10-01 KMpro - Rechnungr     FAV-P Eingangsrechnung (oh				SS	SS
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	2022-09-10 Mayer Steuerberatungsgesellschaft mbH - Rechnungs-hr. REI0037 - FlesApp GmbH - 238,00 EVR - Überwei     FAV-P Eingangsrechnung (ohne Workflow)     Ueferantenname: Mayer Steuerberatungsgesellschaft mbH				SS	SS
	2022-09-10 Mayer Steuerberatungsgesellschaft mbH - Rechnungs-Nr. REI0036 - Fleskapp GmbH - 233,00 EUR - Überwe     FAV-P Eingangsrechnung (ohne Workflow)     Üeferantenname: Mayer Steuerberatungsgesellschaft mbH				SS	SS
	2022-09-10 Huber GbR - Rechnungs-Nr. REI0040 - FAV-Production - 17,85 EUR - Überweisung pdf     FAV-P Eingangsrechnung (ohne Workflow) Uberantenname: Huber GbR Rechnungsnummer: REI0040	Rechnungso	53.90 KB	18.10.2022 15:14	SS	SS



## 1.2.6 Collaborative work on files

As usual with cloud applications, Office files, such as Word, Excel or PowerPoint, can also be edited by several users at the same time via FilesApp, as long as this is supported by the storage system provider, which is documented in the respective connections.

pen 👻 🖉 Rename file 🧻 Delete 🛨 Download 📋 Smart Upload 🚯 Version histo	ry 🚯 Tag History < Share	Tags Chat 🏼 🌋 Subs
Drive	Document type	Size
	Creator	Creation date
Nutzungsbedingungen für die Dienste und Software der FilesApp	Dr.Steiner@filesapp.com	07.04.2023 23:41
GmbH		File last modified
Stand: 2023-06-04		
1 Präambel	Tags edited by Dr. Dieter Steiner - filesapp.com	Tags last edited 07.05.2023 13:09
Die FilesApp GmbH bietet die smarte Datei Management App "FilesApp", die u. a. ein intelli- aentes Dokumenten- und Datei-Management ermöglicht.	Dokumenten-Tags	
Nach Maßgabe der unter Punkt 3 aufgeführten Leistungen bietet die FilesApp folgende Vor- teile:	Datum	© (Bereich Nutzungsbedingungen und AGB
<ul> <li>Suchfunktionalität nach Daten und Dateien über alle angebundenen Speichersysteme</li> </ul>	Dokument Bezeichnung	O Delaurant Benchariburg
strukturierte Ablage von Datelen anhand vom Anwender definierten Dokumententy- pen	Vertragspartner AnwenderInnen und Unternehmen	Sprache DE
Unser Anliegen ist es, mit der FilesApp eine klare und strukturierte übersicht mit schnellem Zugriff in der digitalen Weit zu bieten, völlig gleich, ob im privaten oder beruflichen Umfeld: Die FilesApp sol zu Ihrem Oateihelden werden, auf den Sie sich verlassen können und den Durchblick kehotten.		
Schutz und Sicherheit persönlicher Daten sind in der digitalen Weit das höchste Gut, daher wurde die FilesApp so entwickelt, dass die Datenverwaltung in der Hoheit der privaten An- wender/-innen und Unternehmen liegt. Mehr dazu in der FilesApp Datenschutzerklärung, die unter		
https://filesapp.com/datenschutz		
einsenbar ist.		
∧ ∨ 1 of 10 Q		

Selecting the Open button directly starts the program connected to the operating system. By selecting the down arrow at "Open", online editing is also offered. The joint editing of files is given with all possibilities, there may be restrictions on the connections, this is noted in the description of the connections.



## 1.3 Product variants

FilesApp is offered in the following product variants:

## 1.3.1 FilesApp Private Product Variants

FilesApp Private is available in FilesApp Private and FilesApp Private+ variants.

## 1.3.1.1 FilesApp Private

Free version with the following features:

- Use of clients for all available operating systems
- Possibility of integrating all private storage systems that are mapped in FilesApp
- Insertion of advertising in the apps

#### 1.3.1.2 FilesApp Private+

Paid version, features like FilesApp Private, additionally:

- Use of artificial intelligence to recognize document types and tag content
- ad-free

Private storage systems include, for example:

- iCloud
- Google Drive Private
- Local Drives

The currently supported storage systems are listed under <u>https://filesapp.com/pricing/</u> on the website<u>https://filesapp.com/pricing/</u>.

#### 1.3.2 FilesApp Business Product Variants

If a user or a company, organization, authority, institution, etc. would like to provide their users with FilesApp user licenses, the FilesApp Business Basic and FilesApp Business Professional variants can be booked via the FilesApp website or through a FilesApp partner.

#### 1.3.2.1 FilesApp Business Basic

Paid version for commercial and/or institutional users, features such as FilesApp Private+, additionally:

Integration of the booked business connections



## 1.3.2.2 FilesApp Business Professional

Paid version for commercial and/or institutional users, features such as FilesApp Business Basic, additionally:

- API usage options for connecting other systems (e.g. ERP systems, CRM, etc.)
- Use your own workflows with Microsoft Power Automate

## 1.4 System Requirements

## 1.4.1 Internet access

In order to be able to use the specified services, access to the Internet is required on the part of the user with the devices used. Access to the Internet is not part of the scope of delivery of FilesApp.

The same applies to access and corresponding authorizations for the storage systems and connected systems to be integrated into FilesApp, for example in the case of automation via the API.

#### 1.4.2 Clients

#### 1.4.2.1 Webclient

To use the web frontend, a common Internet browser in the current version is required. This can be reached via the URL <u>https://web.filesapp.com/</u>.

The following browsers are supported and will be tested promptly in their current version for correct function in the event of version adjustments:

- Google Chrome
- Microsoft Edge
- Firefox
- Opera
- Safari

Note: the FilesApp is optimized for Google Chrome.

#### 1.4.2.2 Desktop Apps

The desktop clients of the FilesApp are available for the following operating systems in the current version of the manufacturer:

- Microsoft Windows 10 or later
- MAC OS 12 or later

They can be downloaded from the download section on the FilesApp website under <u>https://filesapp.com/download-en/</u>.



## 1.4.2.3 Mobile Apps

Mobile apps of FilesApp are available for the following operating systems in the current version of the manufacturer:

- Apple iPhones and iPads
- Android smartphones and tablets

They can be downloaded from the Apple App Store for iPhone and iPad or the Google Play Store for Android smartphones and tablets.

## 1.5 Administration

For the administration of FilesApp with its settings, the management of the tags and the document types, the settings area is available in the respective app.

The display, creation or modification of document types and tags can only be carried out by users who have a corresponding authorization on the target storage system based on their login data.

The ability to administer document types is only possible in the desktop versions and in the web client, as a larger display is required for the arrangement of document types and their tags.

FilesApp itself does not require its own user and authorization management, as it uses this APIbased from the connected storage system with its user and authorization management, which simplifies administration.



## 1.6 License Management

## 1.6.1 General information about FilesApp License Management

Every user has the opportunity to use the application himself with a free license. This includes the simultaneous use of the app on all operating systems for which the FilesApp was developed and via web client.

Connections for private storage systems and, in the case of desktop variants, local drives can be integrated and the functions described in the product variants can be used. These connections are also free licenses.

The Business Applications and Connections are subject to a fee. These are available on a subscription basis.

## 1.6.2 Licensing of the FilesApp Private product variant

If the user confirms the FilesApp Terms of Use when accessing the app for the first time, a free FilesApp Private license is available to him/her as a basic variant.

## 1.6.3 Licensing of the FilesApp Private+ product variant

A FilesApp Private+ license can be booked directly in the corresponding app store with the user's account.

## 1.6.4 Licensing FilesApp Business Product Variants

Licenses of the FilesApp Business product variants can be booked via the Online Store function of the FilesApp website <a href="https://filesapp.com/pricing">https://filesapp.com/pricing</a>.

A corresponding number of licenses must be booked per connection. A mixed booking of the business product variants is possible, as well as the booking of several identical connections for different environments of the same storage system.

The business licenses are booked as a pool license.

#### 1.6.5 License management for the FilesApp Business product variants

The account and the associated e-mail address, which is used to book the licenses in the FilesApp shop, is automatically the admin of the connection.

Users can be managed in the FilesApp License Manager - access is via web or desktop client. A license is assigned for each user and the rights admin or user can be assigned.

In addition, the FilesApp Admins have the option to revoke FilesApp licenses from users in the FilesApp License Manager.



## 1.6.6 License check for FilesApp Business product variants

The license check for FilesApp Business product variants, whether a license is available for the user, is done in FilesApp when setting up a connection and when calling a connection, for example when searching or navigating in the directories in FilesApp.

If a user wants to add a FilesApp Business Connection and clicks on the plus sign next to the connections in FilesApp, he/she can select the type of connector in the next window.

After selecting the type of connector, the user is asked to enter his/her e-mail address, and the following constellations are then checked by FilesApp:

- A FilesApp connector license is available for the connector and the corresponding domain and the user is **assigned a FilesApp license** with his or her e-mail address → continue with login
- A FilesApp Connector license is available for the connector and the corresponding domain and the user is not assigned a FilesApp license with his or her e-mail address → Notify admin button to request a license
- There is no FilesApp connector license available for the connector and the corresponding domain → Notification that there are no licenses for this connection yet and whether the user wants to book a license



## 2 Storage Connectors

## 2.1 FilesApp Storage Connectors

We have a variety of storage systems at our disposal, often several instances of one provider, for example Microsoft SharePoint and Microsoft OneDrive in parallel.

FilesApp simplifies the retrieval of files and their structured, correct and automated storage.

For this purpose, all desired and possible storage systems are integrated into FilesApp, for which the so-called FilesApp Connections - the connections to the storage systems - are available.

For example, through the application development of FilesApp, certain storage system providers were connected to FilesApp on an API basis, so that the most important file management functions can be executed directly in the FilesApp.

These include around file management and depending on the authorization of the user on the storage system:

- Creation, editing, deletion
- Copy & Paste
- Drag & Drop
- Smart Upload (this creates tag content in FilesApp)
- easy upload
- Divide
- Etc.

## 2.2 Primary Account

If the user adds an initial connection to a storage system, regardless of whether it is a private or business product variant, the further setup of connections, their arrangement and designation is stored in this primary account of the user.

If the user logs in to FilesApp on another device with this primary account first, the working environment created with this account will also be available on this device. The working environment is automatically kept in sync on all systems.



2.3 FilesApp Private Storage Connectors

#### 2.3.1 Google Drive Connector

#### 2.3.1.1 General Information

With Google Drive, Google provides users with a cloud storage system that allows them to share files and collaborate on documents.

#### 2.3.1.2 Preconditions

Active Google account with Google Drive storage access.

#### 2.3.1.3 Setup

Setting up a FilesApp Google Drive Connection.



Set up a new connection with a Google Drive account in FilesApp using the plus sign in the Connections.



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		BRACCON		
Max Muster - FAV Production		Connect a DRACOON Team		
Max Muster - FAV Pro		Google Drive Business		
T		Conneci o Google prive austriess solite environment.		
		Individual Storage Connect an Individual Storage Instance		
		Microsoft OneDrive Business Connect a Microsoft 365 OneDrive environment		
		Close		

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Select "Sign in with Google".



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Enter and authenticate the credentials of the user's Google account for the relevant cloud storage.

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Google	
Diese App wurde noch nicht von Google überprüht. Es kann alto se sie bald nicht mehr funktioniert. Die dreise App Zugtiff auf ihr Google angeforder hat, auten Sie nur funktionen, wenn Sie diesen App Ein tennen auf man se vertrauenserüchig anzehm (s.schreisengdowne Weitere informationen.	n, dass Kono hokolar hokom,
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Allow the access permissions of the FilesApp.



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After successful authentication, the Google Drive cloud storage will be displayed in the FilesApp. Select it.



Subsequently, the directory structure of the storage system is available in the FilesApp. The files are indexed and are also available via the search after a short time.



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#### 2.3.1.4 Administration and Permissions

For the user and authorization management of the Google Drive Connection, that of the integrated Google Drive environment applies throughout.

## 2.3.1.5 Login

Users can log in with their Google account.

## 2.3.1.6 FilesApp Features

With this type of connection, there are no restrictions on the functionality of the FilesApp.



## 2.3.2 Local Drive Connector

## 2.3.2.1 General Information

In the desktop versions, the local storage systems, which are connected via the computer's operating system, are automatically available in FilesApp free of charge. Both the search and the file storage are possible in this connection.

## 2.3.2.2 Preconditions

Local drive mounted in an up-to-date operating system such as Windows or MAC OS. Installation of FilesApp Desktop App for Windows or MAC OS.

## 2.3.2.3 Setup

No commissioning is required for the integration of the local storage systems, these are automatically available after the start of the FilesApp.

## 2.3.2.4 Administration

No administration is required for Local Drive Connections.

#### 2.3.2.5 Login

The login to the Local Drive Connections takes place when the user logs on to the operating system.

#### 2.3.2.6 FilesApp Features

The local storage systems are not cloud storage systems, so the share function is not available with this type of connection, because FilesApp uses the functions of the storage system on an API basis and these are not available by default on local storage systems.

The same applies to the search, the local files would have to be indexed and transferred to the cloud. For local search, the file manager of the operating system is available.



2.4 FilesApp Business Storage Connectors

#### 2.4.1 DRACOON Connector

#### 2.4.1.1 General Information

The EFS (Enterprise File Sharing) solution DRACOON is a file exchange application that offers data security up to client-side encryption <u>www.dracoon.com</u>.

By connecting DRACOON as a storage connector, it is possible to extend the DRACOON EFS solution with the following features:

- File and document management according to FilesApp's range of functions
- automated data protection via FilesApp document types, this means that document types can be made available in the organization that use the connected DRACOON instance as a storage system, for example for HR topics, contracts, documents relevant to IP law, patents, etc.
- No separate user and authorization management is required in the FilesApp, which applies to DRACOON throughout
- indexed search across all data rooms, including metadata from FilesApp tags and storage of recurring search views
- Al for document recognition and reading the content that can be stored in tags
- Collaborative work on Microsoft 365 documents
- Workflows mit Microsoft Power Automate
- Document Preview
- Extended API functionality with use of tags and their content for document management, e.g. integration of Dracoon into ERP, CRM systems, etc. with direct display of documents stored on Dracoon

#### 2.4.1.2 Preconditions

Active and existing DRACOON account of the user.

Active and existing FilesApp DRACOON Connector license - see https://filesapp.com/pricing/

A license must be assigned to the user by the administrator of the FilesApp DRACOON Connector license.

## 2.4.1.3 Setup

Setting up a FilesApp DRACOON Connection.



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FA DS - SharePoint					
NEO DSFA - Individual Storage					
ETC DSFA - Individual Storage					
DrDS - Google Drive					
FAV MM - SharePoint					
FAV MM - OneDrive					
FA DS - Individual Storage					

## 2.4.1.3.1 Setting up the first document library of the Connection

Set up a new connection to a DRACOON account in FilesApp by clicking on the plus sign next to the Connections.

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DrDS - Google Drive		DRACOON Connect a DRACOON Team	•		
FAV MM - OneDrive		Google Drive Business Connect a Google Drive Business Suite environment			
+		Individual Storage Connect an Individual Storage Instance			
		Microsoft OneDrive Business Connect a Microsoft 365 OneDrive environment			
		Close			

Select the DRACOON connection.



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ETC DSFA - Individual Storage			
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FAV MM - SharePoint			
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FA DS - Individual Storage			
+			
		Close	

Enter the host name (URL) to the DRACOON environment and check it via "Check Host Name". The host name is the URL with which DRACOON makes the environment available for this tenant.

	+ New folder 🛓 Upload 🗂 Paste (1)		🌲 🛛 📥 C 🍥
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DrDS - Google Drive			
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If the host name is successfully checked, "Sign in with DRACOON" can be selected.



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	DRACCÓN	
	Login to grant FilesApp access to your protected resources.	
	Username*	
	Password* 🗞	
	Forgot username? Forgot password? Login	
	Help Imprint Data privacy English *	

Enter and authenticate the login data with the email address of the user's DRACOON account for the relevant DRACOON environment.

DRACCÓN	
Do you want to authorize <b>FilesApp</b> to access your protected resources?	1
Deny	1
Help Imprint Data privacy English 🔻	1

Release the FilesApp usage in the DRACOON environment.





After successful authentication, the DRACOON document library is displayed in FilesApp. Select it.



The data rooms activated for the user are displayed as "sites" and can be integrated as document libraries. In this example, "Finance".

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dr steiner@filesann.com					
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The directory structure of the selected document library is then available in FilesApp. The files are indexed and are also available via the search after a short time.

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ETC DSFA - Individual Storage				•		
DrDS - Google Drive						
FAV MM - SharePoint						
FAV MM - OneDrive						
FA DS - Individual Storage						
dr.steiner@filesapp.com						
+						

2.4.1.3.2 Setting up additional Documents Library of the Connection

Use the + symbol in the upper right corner of FilesApp window to add a new document library.

FilesApp





Select "Add New Library".

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DSM DS - OneDrive	Darccon Global			
FA DS - SharePoint	Finanzen			
NEO DSFA - Individual Storage	DRACCON Global			
ETC DSFA - Individual Storage				
DrDS - Google Drive				
FAV MM - SharePoint				
FAV MM - OneDrive				
FA DS - Individual Storage				
dr.steiner@filesapp.com				
+				

Select the desired document library. In the example, "Datenaustausch".





Subsequently, this document library is available as another tab of this connection.

## 2.4.1.4 Administration and Permissions

For the user and authorization management of the DRACOON Connection, that of the integrated DRACOON environment applies throughout.

Users can only access document libraries, directories, and files for which they have been granted rights by the DRACOON environment. Additional administration in FilesApp is not required or not possible.

#### 2.4.1.5 Login

Users can log in with their DRACOON account or whatever else is provided by DRACOON, such as 2-factor authentication.

#### 2.4.1.6 FilesApp Features

With this type of connection, there are no restrictions on the functionality of FilesApp.


#### 2.4.2 Google Drive Business Connector

#### 2.4.2.1 General Information

With Google Workspace, Google provides companies and organizations with a cloud storage system per workspace that allows them to share files and work together on documents, and offers personal and group sharing in addition to the personal Google Drive storage systems. You can see it as a counterpart to the Microsoft 365 offering.

#### 2.4.2.2 Preconditions

Active Google Workspace account with Google Drive storage access.

## 2.4.2.3 Setup

Setting up a FilesApp Google Drive Connection.



Set up a new connection with a Google Drive account in FilesApp using the plus sign in the Connections.



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Connections	Screenshot 2023-06-13 at 09.44.14.png Private		13.06.2023 09:48 📖 📖
Computer	C 🗟 Screenshot 2023-06-13 at 09.44.20.png Coogle D	rive	13.06.2023 09:48 😡 😡
SharePoint DSI-DSM	Connect	a personal Google Drive environment	13.06.2023 09:48 MM MM
SharePoint FilesApp	C Screenshot 2023-06-13 at 09.45.03.png Microsoft	OneDrive Personal	13.06.2023 09:48 😡 🚳
Finanzen	Connect	a personal OneDrive account	
ETC	Business		
DRACOON	DRACOO	۹.	
Max Muster - FAV Production	Connect	a DRACOON Team	
Max Muster - FAV Pro		rive Business	
T	Connect	n goodia nuva ansimaas zhina auvitoramanin	
		l Storage an Individual Storage Instance	
	Microsoft Connect	OneDrive Business a Microsoft 365 OneDrive environment	
		Close	

Select Google Drive Business connection.

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			+
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Q. Global search	File name		🛧 Size 🕆 File last modifi 🕆 Creato 🕆 Edited by 🏷
♦‡ Smart Upload	Screenshot 2023-06-13 at 09.44.07.png	Google Drive Connect a personal Google Drive environment	1.64 MB 13.06.2023 09:48 MM MM
Connections	C Screenshot 2023-06-13 at 09.44.14.png		1.38 MB 13.06.2023 09:48 🗰 🗰
Computer	Screenshot 2023-06-13 at 09.44.20.png	G Sign in with Google	1.28 MB 13.05.2023 09;48 MM MM
SharePoint DSI-DSM	Screenshot 2023-06-13 at 09.44.29.png		3.69 MB 13.06.2023 09:48 MM
SharePoint FilesApp	C Screenshot 2023-06-13 at 09.45.03.prg		593.91 KB 13.06.2023 09:48 (MM)
Finanzen			
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Max Muster - FAV Production			
Max Muster - FAV Pro			
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		Close	

Select "Sign in with Google".



Annelden - Google Konten      Q. https://scccunts.google.com/AddSession/hac	8	S ( )
Google		
Comparison   Comparison Compariso		
Deer Googe Datemoluz Nutzungsteiningungen Helle	Dautsch	0

Enter and authenticate the credentials of the user's Google account for the relevant cloud storage.

0 0	Antrag auf Berechtigung Q. https://eccounts.google.com/signin(court)/leg.	
	Google	
	Vese App wurde noch nicht von Google überprüft. Eis kann also sein, dass le tald nicht mehr funktioniert. Da dese App Zugriff auf im Google-Konto rgefordert hat, sollten Sie nur forfahren, wen Sie desen App Erbeickler Weiters informationen.	
	FilesApp benötigt Zugriff auf Ihr Google- Konto	
	dr.dieter.steiner@gmail.com           Dadurch erhält FilesApp diese Berechtigungen:	
	Google Drive-Dateien auftrufen, bearbeiten, erstellen und	
	Metadaten von Dateien in Google Drive abrufen und verwalten	
	Itr Profil Ihren persönlichen Daten auf Google zuordnen	
	Personenbezogene Daten aufrufen, einschließlich aller Daten, die Sie öffentlich zugänglich gemacht haben	
	Primäre E-Mail-Adresse lihres Google-Kontos abrufen	
D N ar	h Klicken auf "Zukasen" gewähren Sie deser Ago und Google gemäß den jeweiligen angsbedingungen und der Datenschlutzerklikung Zugriff auf ihre Daten. Sie können diese und rei Kontoberuchigungen jederzeit ändern.	
	Ablehnen Zulassen	

Allow the access permissions of FilesApp.



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FilesApp	A did a sur like serve		
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After successful authentication, the Google Drive Business Cloud storage will be displayed in FilesApp. Select it.



Subsequently, the directory structure of the storage system is available in FilesApp. The files are indexed and are also available via the search after a short time.



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FilesApp	Cruce     A     Cruce     A     Cruce     A     Cruce     A     Cruce     A     Cruce     C		Q Search in this d	rectory
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+ Smart Upload	2002-08-08 13-07-38 Uhr.mp4	1.26 MB	26.07.2018 10:29	D
Connections	2002-08-15 10-29-19 Uhr.mp4	1.30 MB	26.07.2018 10:29	DD
Computer	2002-08-15 10-40-40 Uhr.mp4	917.63 KB	26.07.2018 10:29	
SharePoint DSI-DSM	2002-08-15 10-41-38 Uhr.mp4	622.35 KB	26.07.2018 10:29	DD
OneDrive DSM	□	1.88 MB	26.07.2018 10:29	DD
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		1.07 MD	20.07.2010 10.29	
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🙆 Dr Ds 🚦	2002-11-11 2002Uhr Carla und Paula im Kinderzimmer.mp4	96.27 MB	26.07.2018 17:21	DD
+	0 2002-11-18 18-29-23 Uhr.mp4	59.23 MB	26.07.2018 17:54	DD
	0 2002-11-18 18-30-31 Uhr.mp4	44.30 MB	26.07.2018 17:54	DD
	2002-12-23 1703Uhr Weihnachtsbaum ist aufgesteilt.mp4	51.27 MB	26.07.2018 16:49	DD
	2002-12-23 17/8Uhr Carla und Paula schlafen.mp4	31.99 MB	26.07.2018 16:49	DD
	🖸 📄 2002-12-23 18-20-03 Uhr.jpg	2.25 MB	23.12.2002 16:50	DD
	🖸 🚋 2002-12-24 11-45-02 Uhr.jpg	3.26 MB	24.12.2002 09:55	DD
	🖸 📄 2002-12-24 11-55-25 Uhr.jpg	3.52 MB	24.12.2002 09:55	DD
	C 2002-12-24 16-16-03 uhr.jpg	2.21 MB	24.12.2002 14:46	DD

# 2.4.2.4 Administration and Permissions

For the user and authorization management of the Google Drive Connection, that of the integrated Google Drive Workspace environment applies throughout.

Users can only access directories and files for which they have been granted rights by the Google Drive Workspace environment. Additional administration in FilesApp is not required or not possible.

Likewise, a user will not be able to search for and find files in Google Drive Workspace directories and files if they do not have permission to do so by the Google Drive Workspace Administration.

Owners of Google Drive Workspaces can create and manage document types and tags in FilesApp. Users of Google Drive Workspaces can only apply them.

#### 2.4.2.5 Login

Users can log in with their Google account.

#### 2.4.2.6 FilesApp Features

With this type of connection, there are no restrictions on the functionality of FilesApp.



# 2.4.3 Individual Storage Connector

# 2.4.3.1 General Information

If an organization wants to integrate its own storage system into FilesApp for security and data protection reasons, for example in order to be able to provide different document libraries in a multi-client capacity, the Individual Storage Connector is available.

The individual storage can be operated in the cloud or on-premises.

This system is suitable for customers who do not use cloud services such as SharePoint or Google Drive or who want to store sensitive files on their own servers.

The service encrypts each stored file with its own key according to the AES 256 bit standard and enables the management of users, authorizations and projects. Provisioning is also done via Docker. Installation documentation is available upon request.

It is <u>https://filesapp.com/pricing/</u> possible to order the corresponding FilesApp licenses via the FilesApp Online Store.

# 2.4.3.2 Preconditions

The organization can put the Docker container or VM images (Virtual Machines for Windows or Linux) provided by FilesApp into operation in its own data center resources or have it made available by a corresponding data center partner or FilesApp partner.

As soon as the licenses have been booked, FilesApp will provide the image for setting up the individual storage in coordination with the client.

The prerequisite for the use of individual storage is the provision of an appropriate system.

The installation of the Individual Storage storage system is described in a separate documentation, which is provided to the client by FilesApp.

#### 2.4.3.3 Setup

Setting up a FilesApp Individual Storage Connection.



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Connections	) Screenshot 2023-06-13 at 09.44.14.png	1.38 MB 13.0	6.2023 09:48 😡 😡
Computer	Screenshot 2023-06-13 at 09.44.20.png	1.28 MB 13.0	6.2023 09:48 🔊 🕬
SharePoint DSI-DSM	Screenshot 2023-06-13 at 09.44.29.png	3.69 MB (13.0	6.2023 09:48 😡 😡
OneDrive DSM	Screenshot 2023-06-13 at 09.45.03.png	593.91 KB 13.0	6.2023 09:48 🕅 🧰
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Max Muster - FAV Production			
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# 2.4.3.3.1 Setting up the first document library of the Connection

Set up a new connection to an Individual Storage in FilesApp via the plus sign in the Connections.

	+ New folder 👲 Upload		🛊 00 🛥 C 🍥
			+
FilesApp		Add connection	Q Search in this directory
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Computer	Screenshot 2023-06-13 at 09.44.20.prg	Google Drive	13.06.2023 09:48 🗰 🐜
SharePoint DSI-DSM	C Screenshot 2023-06-13 at 09.44.29.png	Connect a personal Google Drive environment	13.06.2023 09:48
SharePoint FilesApp	C Screenshot 2023-06-13 at 09.45.03.png	Microsoft OneDrive Personal	13.06.2023 09:48
inanzen			
ETC		Business 👻	
		DRACCON Connect a DRACOON Team	
Max Muster - FAV Production		Google Drive Business Connect a Google Drive Business Suite environment	
+		Individual Storage connect on Individual Storage Instance	
		Microsoft OneDrive Business Connect a Microsoft 365 OneDrive environment	
		Close	

Select the Individual Storage Connection.



• • •	+ New folder 🛓 Upload		🌲 00 🐟 C 🛞
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FilesApp		← Add connection	Q Search in this directory
Q. Global search	File name	_	He last modifiently the Creato the Edited by the the transmission of the Hermitian transmission of the transmission of transmission of the transmission of transmission of the transmissi
♦‡ Smart Upload	C Screenshot 2023-06-13 at 09.44.07.png	Connect an Individual Storage Instance	13.06.2023 09:48 MM MM
Connections	Screenshot 2023-06-13 at 09.44.14.png		13.06.2023 09:48
Computer	Screenshot 2023-06-13 at 09.44.20.png	FilesApp individual Storage Host code	13.06.2023 09:48 MM MM
SharePoint DSI-DSM	C Screenshot 2023-06-13 at 09.44.29.png	Q Host Code prüfen	13.06.2023 09:48
SharePoint FilesApp	C Screenshot 2023-06-13 at 09.45.03.png		13.06.2023 09:48
Finanzen			
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Max Muster - FAV Pro			
+			
		Close	

In the next step, enter the host code of the individual storage and select "Check host code".

The host code is communicated to the admin of the Individual Storage when the Individual Storage environment is put into operation, and the users in turn receive it from their administrators.

•••	+ New folder 👲 Upload		🌲 00 🧆 C 🛞
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Q Global search	File name		File last modifier $\uparrow_{\varphi}$ . Creato $\uparrow_{\varphi}$ . Edited by $\uparrow_{\varphi}$
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Connections	Screenshot 2023-06-13 at 09.44.14.png		13.06.2023 09:48 😡
Computer	C Screenshot 2023-08-13 at 09.44.20.png	E FilesApp	13.06.2023 09:48
SharePoint DSI-DSM	C Screenshot 2023-06-13 at 09.44.29.png	G- Sign in with Username and Password	13.06.2023 09:48 😡 😡
SharePoint FilesApp	Screenshot 2023-06-13 at 09.45.03.png		13.06.2023 09:48 😡
E Finanzen		Sign in with Microsoft	
ETC			
DrDS			
Max Muster - FAV Production			
Max Muster - FAV Pro			
+			
		Close	
		Close	

If the host code is resolved correctly, the login can be continued.

Via the welcome email when the administrator sets up a user, the user can either set up a username and password to log in to the Individual Storage or log in to the Individual Storage



with an MS365 account used for the Individual Storage Account with its email address via Microsoft 365 login.

Welcome to FilesApp	$\Leftrightarrow \odot \leftarrow \ll \rightarrow$
<ul> <li>FIIesApp Message <message@filesapp.com></message@filesapp.com></li> <li>To: O Dr. Dieter Steiner - filesapp.com</li> </ul>	Tuesday, 13. June 2023 at 15:34
Files Αρρ	
Welcome to ETC's FilesApp storage	
your smart and secure solution for exchanging documents with your tax consulting office.	
ETC created a FilesApp account for you.	
To get started please follow the steps below.	
1. If the email address you received this email with is a Microsoft 365 account, you can	use
your Microsoft log in credentials to log in to the FilesApp. Otherwise use basic authention	cation
with your mail address as username and set a password for your account:	
Set new password	
2. Download the FilesApp app via the following link. You're able to use the FilesApp in parallel on any supported operating system:	
Download the app	
3. Click on the button below to connect your FilesApp installation with the secured stora system of ETC:	ge
Setup the app	
If there is any question, please, don't hesitate to contact us: support@filesapp.com	

Here is an example of an invitation e-mail to an individual storage, as it is sent when a new user is created.



Microsoft Sign in Ernall address, phone number or Skype Mo account? Create one! Cart access your account? Back Next	000	Sign in to your account Q. https://ogin.microsoftanine.com/common/us •
Q Sign-in options		Microsoft Sign in Email address, phone number or Skype Mo account? Create ons! Eart access your account?
		Sign-In options

For Microsoft login, enter and authenticate the login data with the e-mail address of the user's Microsoft 365 account for the relevant Microsoft 365 tenant.

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$\overline{(2)}$	🛐 New X				+
FilesApp					
Q Global search	Add new library				
✦ Smart Upload	Dr. Dieter Steiner - filesapp.com Dr. Steiner@Filesapp.com				
Connections	individual Storage				
Computer					
SharePoint DSI-DSM					
OneDrive DSM					
SharePoint FilesApp					
Finanzen					
ETC					
OrDS					
Max Muster - FAV Production					
Max Muster - FAV Production					
Dr. Dieter Steiner - file					
+					

After successful authentication, the document library of the Individual Storage is displayed in FilesApp. Select it.





The "sites" available for this user due to the user rights in the Individual Storage environment are listed. Select the desired "site" here.

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FilesApp					
Q Global search		Select document library			
✦ Smart Upload		Q search			
Connections		All Libraries			
Computer					
SharePoint DSI-DSM		Test Library			
OneDrive DSM					
SharePoint FilesApp					
Finanzen					
Max Muster - EAV Production					
Max Muster - FAV Production					
Dr. Dieter Steiner - file					
+					

In the next step, the document library of the selected "site" will be displayed. Select the one you want here.

A special feature here is the document library "All Libraries".

Individual storage is a multi-tenant storage system, which is relevant, for example, in companies with different customer or client communications. In this way, individual document libraries or, for example, all libraries internally, can be released for editing by all clients.



With appropriate user rights, this is displayed and includes access to all document libraries of the Individual Storage.



Example view when selecting "All Libraries" with access to all tenants of the Individual Storage shared with the user.



When a specific document library is selected, the directory structure of the selected document library is then available in FilesApp. The files are indexed and are also available via the search after a short time.





# 2.4.3.3.2 Setting up additional document libraries of the Connection

In FilesApp, select the plus sign in the upper right corner of the connection.



Select "Add New Library".



		0 🌰	с 🛞
$\Box$	🕞 Test Library x 😥 New X		+
FilesApp	Select SharePoint Site		
Q Global search	Q Search		
✦‡ Smart Upload			
Connections			
Computer			
DSM DS - SharePoint			
DSM DS - OneDrive			
FA DS - SharePoint			
NEO DSFA - Individual Storage			
ETC DSFA - Individual Storage			
DrDS - Google Drive			
FA DS - DRACOON			
FAV MM- SharePoint			
FAV MM - OneDrive			
FA DS - Individual Storage			
+			

Select the desired "site" here.

		) a - c
C)	Test Library x S New X	+
FilesApp		
Q Global search		
✦‡ Smart Upload		
Connections	All Libraries	
Computer		
DSM DS - SharePoint	Test Invoices 10002 - Internal	
DSM DS - OneDrive		
FA DS - SharePoint	Test Library 10001 - Internal	
ETC DSFA - Individual storage		
DrDS - Google Drive		
FA DS - DRACOON		
FAV MM- SharePoint		
FAV MM - OneDrive		
FA DS - Individual Storage		
+		

The document libraries are displayed.



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FilesAco	Testlbrory x 😥 New X			+
Q Global search	← Select document library			
Smart Upload	Q Search			
Connections	All Libraries			
Computer				
DSM DS - SharePoint	Test Invoices			
DSM DS - OneDrive				
NEO DSFA - Individual Storage	Test Library 10001 - internal			
ETC DSFA - Individual Storage				
DrDS - Google Drive				
FA DS - DRACOON				
FAV MM- SharePoint				
FAV MM - OneDrive				
+				

Select the desired document library and it will then be available as a new tab for this connection in FilesApp.

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	Test librory X Test Involces X			+	
FilesApp			0 \$	earch in this directory	
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▲ Smart Unload			17.06.2023.15:05		
Connections				• •	
Connections					
DSM DS - SharePoint					
DSM DS - OneDrive					
FA DS - SharePoint					
NEO DSFA - Individual Storage					
ETC DSFA - Individual Storage					
DrDS - Google Drive					
FA DS - DRACOON					
FAV MM- SharePoint					
FAV MM - OneDrive					
FA DS - Individual Storage					
+					

Repeat this process for all desired document libraries.



## 2.4.3.4 Administration and Permissions

For the user and authorization management of the Individual Storage, FilesApp provides a web-based administration interface - the Individual Storage Admin Portal. The administrator of the Individual Storage Connection receives the access data as a result of the booking or commissioning.

The first user of the Individual Storage to be created is also the administrator. They can create additional users or administrators and manage them in addition to groups in the Individual Storage Admin Portal.

## 2.4.3.5 Login

Users can log in to Individual Storage using a username and password or a Microsoft 365 account, as long as the email address used for the user in the Individual Storage Admin Portal is also assigned to a Microsoft 365 account.

## 2.4.3.6 FilesApp Features

With this type of connection, there are no restrictions on the functionality of FilesApp.



#### 2.4.4 Microsoft 365 OneDrive for Business Connector

#### 2.4.4.1 General Information

As described in the Microsoft 365 SharePoint Connector section, the various functionalities are available in a Microsoft 365 tenant.

By default, each user also receives the OneDrive for Business app in the tenant, which is a separate storage system for the user. This is a separate online document library for the user in the Microsoft 365 environment, which is located in the base on the tenant's SharePoint environment.

#### 2.4.4.2 Preconditions

Active and existing Microsoft 365 account of the user and unlocked OneDrive app in the account.

Active and existing FilesApp Microsoft 365 SharePoint Connector license - see <a href="https://filesapp.com/pricing/">https://filesapp.com/pricing/</a>

The user must have a license assigned by the administrator of the FilesApp Microsoft 365 SharePoint Connector license.

#### 2.4.4.3 Setup

Set up a FilesApp Microsoft 365 OneDrive for Business Connection.

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$\bigcirc$	5 Eingangsrech X 9 Documents X	+
FilesApp	FAV-P FINANCE   Documents > Finance > Eingangsrechnungen	Search in this directory
Q Global search	C D File name + Size to, File last modified	$\downarrow$ Creato $\uparrow_{\downarrow}$ Edited by $\uparrow_{\downarrow}$
✦↓ Smart Upload	2023-08-12 Adobe Systems - Rechnungs-tw. EE2022006600065-3 FAV-Production - 52.06 EUR - Abbuchung.pdf         56.80 K8         12.06.2023 09:33           FAV-P Eingangurechnung (ohne Workflow)         Rechnungsatummer: EE2022006800065-3         Lieferantenname: Adobe Systems         Rechnungsdatum: 12.1	SS SS
Connections	2023-06-12 Adobe Systems - Rechnungs-Wr. IE2022006600065-1 - FAV-Production - 52.06 EUR - Abbuchung.pdf         56.80 K8         12.06.2023 06.43           FAV-P Eingongreechnung (ohne Workflow)         Rechnungsnummer. IE2022006800065-1         Lieferontenname: Adobe Systems         Rechnungsdatum: 12.0	SS SS
SharePoint DSI-DSM	2023-01-08 Huber GbR - Rechnungs-Mr. REI0048 - FAV-Production - 11,90 EUR - Überweisung.pdf     2023-01-08 Huber GbR - Rechnungsdatum: 08.01/2023 Rechn	· · · · · · · · · · · · · · · · · · ·
OneDrive DSM	2022-12-07 Huber CBR - Rechnungs-Nr. REI0047 - FAV-Production - 17,85 EUR - Überweisung.pdf         121.31 KB         26.04.2023 16:40           FAV-P Eingangsrechnung (ohne Workflow)         Lieferantennome: Huber GBR         Rechnungsnummer: REI0047         Rechnungsdatum: 07.12.2022         Rechn	• •
Finanzen	2022-10-10 Huber GbR - Rechnungt-Nr. RE12345 - FAV-Production - 17,85 FUR - Úberweisung.pdf         52.80 KB         18.10.2022 09:26           FAV-P Eingangsrechnung (ohne Workflow)         Lieferontennome: Huber GbR         Rechnungsnummer: RE12345         Rechnungsdatum: 10.10.2022         Rechnil	SS SS
ETC	D         2022-10-06 KMpro - Rechnungs-Nr. 10 2022 4284 - FAV-Production - 267,75 EUR - Abbuchung.pdf         59.96 K8         07.12.2022 16:36           FAV-P Eingangsrechnung (ohne Workflow)         Lieferantennomer. KMpro         Rechnungsnummer: 10/2022/4284         Rechnungsdatum: 06.10.2022         Rech	SS SS
	D         2022-10-06 KMpro - Rechnungs-Nr. 10 2022 4283 - FAV-Production - 267,75 EUR - Abbuchung.pdf         64.69 K8         07.12.2022 16.46           FAV-P Engangsreechnung (ohne Workflow)         Lieferontennome: KMpro         Rechnungsnummer: 10/2022/4283         Rechnungsdatum: 06.10.2022         Rech	SS SS
Max Muster - FAV Pro	D         2022-10-01 KMpro - Rechmungs-Nr: 10 2022 5044 - FAV-Production - 267,75 EUR - Abbuchung.pdf         59.88 K8         07.12.2022 16.33           FAV-P Engangsrechnung (ohne Workflow)         Lieferantenname: KMpro         Rechmungsnummer: 10/2022/5044         Rechmungsdatum: 0110.2022         Rechmungsdatum: 0110.2022         Rechmungsdatum: 0110.2022         644	SS SS
<b>*</b>	D         2022-10-01 KMpro - Rechnungs-Nr. 10 2022 4287 - FAV-Production - 267,75 EUR - Abbuchung pdf         59.90 K8         16.02.2023 22.49           FAV-P Eingangsrechnung (ohne Workflow)         Lieferantenname: KMpro         Rechnungsnummer: 10/2022/4287         Rechnungsdatum: 01.10.2022         Rechn	SS SS
	D         2022-10-01 KMpro - Rechnungs-Nr. 10 2022 4288 - FAV-Production - 267,75 EUR - Abbuchung pdf         59.90 K8         07.12.2022 16.35           FAV-P Engangsreechnung (ohne Workflow)         Lieferantennamer. KMpro         Rechnungsnummer. 10/2022/4288         Rechnungsdatum: 01.10.2022         Rechr	SS SS
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Select "Sign in with Microsoft".



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Microsoft	
Sign in Email address, phone number or Skype	
No account? Create one!	
Can't access your account?	
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Q. Sign-in options	
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Enter and authenticate the login data with the email address of the user's Microsoft 365 account for the relevant Microsoft 365 tenant.

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After successful authentication, the OneDrive document library is displayed in FilesApp. Select it.





The directory structure of the selected document library is then available in FilesApp. The files are indexed and are also available via the search after a short time.

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#### 2.4.4.4 Administration and Permissions

For the user and authorization management of the Microsoft 365 OneDrive for Business Connection, that of the integrated Microsoft 365 SharePoint environment applies throughout.



Users can only access document libraries, directories and files for which they have been granted rights by the Microsoft 365 OneDrive for Business environment. Additional administration in FilesApp is not required or not possible.

#### 2.4.4.5 Login

Users can sign in with their Microsoft 365 account.

#### 2.4.4.6 FilesApp Features

With this type of connection, there are no restrictions on the functionality of FilesApp.



## 2.4.5 Microsoft 365 SharePoint Connector

## 2.4.5.1 General Information

A Microsoft 365 site, also known as a SharePoint site, is a web-based collaboration and document management platform provided by Microsoft. It is part of the Microsoft 365 suite of productivity tools, which includes applications such as Word, Excel, PowerPoint, Outlook, and more.

SharePoint sites are designed to help teams and organizations store, organize, and share information, documents, and resources. They provide a central location where users can collaborate on projects, co-create documents, manage workflows, and maintain version control.

Microsoft 365 sites offer several features and functionality, including document libraries for storing files, lists for tracking data, calendars for scheduling events, discussion boards for communication, and customizable web parts for displaying relevant information.

These websites can be accessed through web browsers, mobile devices, and desktop applications, giving users the flexibility to access their content and collaborate regardless of their location.

Microsoft 365 sites also provide security features to protect sensitive information and control access to documents and resources. Administrators can define permissions and user roles to ensure that only authorized people can view, edit, or share specific content.

Overall, Microsoft 365 sites facilitate collaboration, communication, and information management within organizations, enabling teams to collaborate efficiently and effectively.

With the widely used Microsoft 365 Apps, a Microsoft 365 SharePoint document library is available per tenant (a licensee's environment with Microsoft 365 Apps), which is based on the storage system provided by Microsoft in such an environment.

This environment is divided into different document libraries, such as the Microsoft 365 Groups and Teams that are set up, or individual sites. With each of the functionalities mentioned, separate document libraries are made available on the SharePoint environment of the Microsoft 365 tenant, they can be regarded as their own storage systems, since different user authorizations can also be defined for each document library.

In this way, a user with a Microsoft 365 license can have access to several document libraries in addition to using the unlocked apps. As an example, a company can be mentioned here, for example, for which, for example, a Microsoft 365 team has been set up per department. Each team has its own document library.

FilesApp makes it easy to access the various document libraries without having to switch between the document libraries in several steps. In addition, FilesApp allows you to quickly find files via all document libraries set up in the FilesApp, and much more.

In FilesApp, several document libraries and also several different Microsoft 365 tenants, again with their document libraries, can be set up.

#### 2.4.5.2 Preconditions

Active and existing Microsoft 365 account of the user.



Active and existing FilesApp Microsoft 365 SharePoint Connector license - see <u>https://filesapp.com/pricing/</u>

The user must be assigned a license by the administrator of the FilesApp Microsoft 365 SharePoint Connector license.

#### 2.4.5.3 Setup

Setting up a FilesApp Microsoft 365 SharePoint Connection.

#### 2.4.5.3.1 Setting up the first document library of the Connection



In FilesApp, set up a new connection to a Microsoft 365 SharePoint tenant via the plus sign in the Connections.



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		Microsoft OneDrive Business Connect a Microsoft 385 OneDrive environment	
	>	Microsoft SharePoint Connect a Microsoft 385 SharePoint Tenant to create a connection to a document library	
		Microsoft Teams Eine Verbindung zu einem Microsoft 385 Team herstellen.	
		Close	

Select Microsoft SharePoint connection.

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Select "Sign in with Microsoft".



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Microsoft	
Sign in Email address, phone number or Skype	
No account? Create one!	
Can't access your account?	
Back Next	
C Sign-in options	
	Terms of use Privacy & cookies

Enter and authenticate the login data with the email address of the user's Microsoft 365 account for the relevant Microsoft 365 tenant.



After successful authentication, the document library of the Microsoft 365 tenant is displayed in FilesApp. Select it.



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The "sites" available to this user due to user rights in the Microsoft 365 environment are listed. Select the desired "site" here.



In the next step, the document library of the selected "site" will be displayed. Select it.





The directory structure of the selected document library is then available in FilesApp. The files are indexed and are also available via the search after a short time.

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2.4.5.3.2 Setting up additional document libraries of the Connection

In FilesApp, select the plus sign in the upper right corner of the connection.



Select "Add New Library".





Select the desired "site" here.

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The document library is displayed.



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Select it and it will then be available as a new tab for this connection in FilesApp.

Repeat this process for all desired document libraries.

# 2.4.5.4 Administration and Permissions

For the user and authorization management of the Microsoft 365 SharePoint Connection, that of the integrated Microsoft 365 SharePoint environment applies throughout.

Users can only access document libraries, directories and files for which they have been granted rights by the Microsoft 365 SharePoint environment. Additional administration in FilesApp is not required or not possible.

The permissions apply to the entire FilesApp range of functions. If, for example, the external sharing of documents is not approved by the Microsoft 365 SharePoint Administration, this is also not possible via the FilesApp.

Likewise, a user cannot search for and find files in document libraries if he/she does not have access authorization from the Microsoft 365 SharePoint administration.

Owners of Microsoft 365 SharePoint document libraries, such as those created by Microsoft 365 Teams, can create and manage document types and tags in FilesApp. Users of Microsoft 365 SharePoint document libraries can only apply them.

#### 2.4.5.5 Login

Users can sign in with their Microsoft 365 account.



# 2.4.5.6 FilesApp Features

With this type of connection, there are no restrictions on the functionality of FilesApp.



# 3 Search

## 3.1 FilesApp Search

If storage systems and their document libraries have been integrated into FilesApp, the files and their contents are indexed (if content indexing is activated) and are available for search after indexing.

## 3.2 Current Directory Search

If the user only wants a simple search for file names in the current directory, this can be executed in the search field.





#### 3.3 Globale Suche

## 3.3.1 Search in general

If the Global Search is selected by clicking/typing in the corresponding field, "All" files will be displayed first.



If strings are now entered for the search, FilesApp filters for the characters in all areas, such as file names, directories, tags and file contents.



## 3.3.2 Search in file names

For a more detailed search only for file names that contain the string specified in the search, the "File name" tab is available.



# 3.3.3 Search in directory names

The targeted search for directories is possible via the "Directory name" tab.





#### 3.3.4 Search in Tags

If a file has been tagged with a document type via FilesApp using Smart Upload, Workflow or API connection, it is possible to search specifically for tag content.



By entering more strings, a search can become more and more detailed.





#### 3.3.5 Search in file contents

If content indexing is activated for a connection, it is also possible to search for them, regardless of file names and tags.




#### 3.4 Search Filter

The filter button provides further options for refining the search.



In this way, specific documents, libraries, document types or tag contents can be selected and the search result is filtered on them.



#### 3.5 Extended Search

The advanced search feature can be used to create rules on what the search results should be filtered to.



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This means that even complex queries can be easily compiled.



### 3.6 Search Views

Recurring search filters and advanced search rules can be saved as search views in FilesApp. This means that they do not have to be compiled again, especially with more complex search filters, such as those that can be configured via the advanced search.



# 4 File and Document Management

# 4.1 FilesApp File and Document Management

Recurring processes can be optimized by the document types and tags of FilesApp in terms of processing speed and reliable and structured storage up to automation. Finding files is many times faster because you can also search specifically for tag content and use search views.

Basically, FilesApp offers functionalities far beyond a document management system, as it enables the structured storage and retrieval of any file type. When designating the storage functionalities, we have adopted the term "document type", as this has established itself as the standard and the designation "file type" can lead to confusion due to the established assignment of the term to "file format".

It is important for us to note that FilesApp not only enables the structured storage and retrieval of documents, but also of any file type. The application examples are far-reaching, whether machine data, reports, integrations as a backend for connected systems, and much more.

To be able to map this in FilesApp, it is possible to create individual document types and equip them with tags relevant to the respective document type in order to ensure the desired information for the structured storage of the file as well as quick findability.

The files themselves are not stored in FilesApp environment, only the information about FilesApp, such as the document types and the tags with their contents.

To be able to create a document type, the user needs the necessary rights in the document library that is to be used with the document type to store these files. In the case of Microsoft SharePoint, for example, this is an "owner" of a Microsoft 365 group. The User role is only allowed to use document types but cannot modify them or create new ones.

# 4.2 FilesApp Document Types

The FilesApp document types create the basis on which storage system, under which directory and with which file name specification a file is to be stored. The corresponding tag contents are stored for this purpose.

Document types can be kept very simple and can be complex in the number of tags to be set up for process optimizations, workflows or automations, depending on whether several pieces of information are required for a file or, for example, several workflow steps.

Here is an example of a simple document type, for example when managing private insurance documents:



lit document type										
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Here is an example of a more complex document type, for example in the case of incoming invoices, which are controlled by workflow for the verification process of the invoice and pass through several departments of a company:

000						7
Edit document type						
Document type name FAV-P Fingangsrechnung (Workflow)	Dokumenten-Tags					
	1 Status	\$	1	2 Fachbereich	\$	
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Document Library	1 Rechnung Nr. (FAV-P)	\$	1	2 Bestellnummer (FAV-P)	\$	
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LIEFERANTEN > Lieferantenname - Lieferantenadresse > AUFTRÄGE	9 Leistungszeitraum von	\$		10 Leistungszeitraum bis	¢	
Name	11 Erstellt von	\$		12 Erstellt am	\$	
FAV-P EINKAUF (Rechnung Nr. (FAV-P) - Eingangsrechnung - (Beferantername) - (Rechnung Nr. (Beferant)						
Document type is active	Datenschutz				+	
□ Al prediction is active ⊙	1 Klassifizierung	\$	/	2 Schutzbedarf	\$	
	Freigabe Fachbereich					•••
	1 Freigabestatus Fachbereich	\$	1	2 Kommentar Fachbereich	\$	
	3 Freigabe Fachbereich von	\$	1	4 Freigabe Fachbereich am	\$	
					Cancel Delete	



				54 54
Edit document type				
	Freigabe Fachbereich			✓ + …
	1 Freigabestatus Fachbereich	٠	1	2 Kommentar Fachbereich 💠 🧨
	3 Freigabe Fachbereich von	\$	1	4 Freigabe Fachbereich am 🔅 🖍
	Gutschriftserwartung			+ …
	1 Gutschriftserwartung Nummer	٥	1	2 Gutschriftserwartung Betrag (netto) 🔅 🧨
	Freigabe Controlling			✓ + …
	1 Freigabestatus Controlling	\$	1	2 Kommentar Controlling
	3 Freigabe Controlling von	٠	1	4 Freigabe Controlling am 🔅 🖍
	Freigabe Geschäftsführung			
			-	
	1 Freigabestatus Geschäftsleitung	•		2 Kommentar Geschäftsleitung
	3 Freigabe Geschäftsleitung von	•		4 Freigabe Geschäftsleitung am 🔅 🇨
	5 Fälligkeitsdatum	\$		6 Zahlungsbedingungen 🔅 🧨
	7 Skontopreisdatum	\$		8 Nettopreisdatum 🔅 🌶
	9 Skonto	\$		10 Zahikonto 🌣 🖍
	11 Zahldatum	\$		12 Hinweis auf Gutschriftserwartung 🔅 🖍
				Cancel Delete Save

## 4.2.1 Create Document Types

Managing the document types is possible via the settings section in FilesApp desktop apps and the web client.

To do this, the user needs the authorization to be able to manage document types. The authorization takes effect from the storage system for which the document type is to be used. For example, in a Microsoft SharePoint environment, the user needs owner rights of a Microsoft 365 group. If the user is only a member of the group, he/she can apply the document type, but not administer it.





Select the settings area by clicking on the avatar in the upper right corner of FilesApp window.

	+ New folder 🛓 Uplood	🜲 💷 📥 C 🏟
$\Box$	3 Documents X Documents X	🔆 Light 🔸 System 🌜 Dark
FilesApp	C > FAV-PRIVANCE   Documents	Language 🕨
Q Global search	□     □     File name     ↓     Size 1, File lastmx	Settings
Smart Upload	C Seneral 347.93 KB 247.20	
Connections	C 5 Fotos 12.85 MB 09.06.202	2: Sign out
Computer	C Finance 225 MB 18.10.202	22 09:05 SS SS
DSM DS - SharePoint		<b>·</b> · ·
DSM DS - OneDrive		
FA DS - SharePoint		
NEO DSFA - Individual Storage		
ETC DSFA - Individual Storage		
DrDS - Google Drive		
FA DS - DRACOON		
EA DS - Individual Storage		
+		

Select Settings.





Select Manage Document Types.

	+ New folder 🛓 Upload	Manage document types		🌲 🚥 🛥 C 🍥
		Active document types	Inactive document types	+
FilesApp				Q Search in this directory
Q. Global search	File name	Q, fav		$\uparrow_{\downarrow}$ Creato $\uparrow_{\downarrow}$ Edited by $\uparrow_{\downarrow}$
<b>♦</b> <sup>+</sup> Smart Upload	General		aw)	O SA SA
Connections	🗋 🖿 Fotos	Dokumententyp für Workflow Eingang Max Muster - FAV Production	Isrechnung	8 SS SS
Computer	Finance	FAV-P Eingangsrechnung (ohne	Workflow)	s ss ss
DSM DS - SharePoint		Max Muster - FAV Production	Q	Ŭ Ŭ
DSM DS - OneDrive				
FA DS - SharePoint				
NEO DSFA - Individual Storage				
ETC DSFA - Individual Storage				
DrDS - Google Drive				
FA DS - DRACOON				
FAV MM- SharePoint				
FAV MM - OneDrive				
FA DS - Individual Storage				
+				
		Create document type from template	Create document type	

The document types to which the user has access are then displayed and the document types can be filtered using the search field.



#### 4.2.2 Copying document types

Document types can be taken from templates that have already been created or from templates. FilesApp provides more and more document types that have proven themselves in practice and simplify and accelerate file management many times over.



For each of the existing document types, there is a copy button in the right area.

	Manage document types		🌲 💷 👄 C 🍥
	Active decument types		+
FilesApp			Q Search in this directory
Q Global search			$\uparrow_{\downarrow}$ Creato $\uparrow_{\downarrow}$ Edited by $\uparrow_{\downarrow}$
-∲‡ Smart Upload			SA SA
Connections	Dokumententyp für Workflow Eingangsrechnung Max Muster - FAV Production	D	ss ss
Computer DSM DS - SharePoint	FAV-P Eingangsrechnung (ohne Workflow) Max Muster - FAV Production	į.D	SS SS
DSM DS - OneDrive			
FA DS - SharePoint			
NEO DSFA - Individual Storage	Do you want to keep existing tags?		
ETC DSFA - Individual Storage	Should you want to adopt existing tags, the document typ	e can only be used for	
DrDS - Google Drive	one.		
FA DS - DRACOON	Recreate tags Use exis	ing tags Cancel	
FAV MM- SharePoint			
FAV MM - OneDrive			
FA DS - Individual Storage			
+			
	Create document type from template	Create document type	

When copying a document type, the user can decide whether the tags contained therein should be included or copied into new tags.



If the existing tags are applied, these tags apply to both the new and the existing document types in which they were used.

If the existing tags are transferred to new tags, the tags of the new document type are recreated regardless of the tags already in use. During configuration, the tags then contain "Template" next to the tag name for information. After saving the document type for the first time, "Template" is hidden.

In order to copy a document type between different storage systems and/or from one document library to another, the rebuild of the tags setting must be used, as they usually do not yet exist on the target system. Only then can a different storage system or document library be selected when adapting the copy.

See also the Tag Creation section of the statement of work.



After selection, the document type can be customized.



### 4.2.3 Create a document type from a template

FilesApp provides numerous document type templates that have proven themselves in practice. These can be templates for invoices, insurance documents, bank statements, correspondence and much more.



By selecting the "Create document type from template" button, the user gains access to the templates.

#### 4.2.4 Creation of a new document type

A document type can also be created individually from scratch.



60	+ New folder  Upload  Documents X Documents	Manage document types	×	1 00 🛥 C 🔞
FilesApp		Active document types Inactive document types		Q Search in this directory
Q Global search	File name	Q, fav		↓ Size ☆, File last modifi ☆, Creato ☆, Edited by ☆,
++ Smart Upload	General			347.93 KB 24.02.2022 16:20 SA SA
Connections	Fotos	Dokumententyp für Workflow Eingangsrechnung	Q	12.85 MB 09.06.2023 01:18 SS SS
Computer	Finance	FAV-P Eingangsrechnung (ohne Workflow)		2.25 MB 18.10.2022 09:05 SS SS
DSM DS - SharePoint		Max Muster - FAV Production	0	Ŭ Ŭ
DSM DS - OneDrive				
FA DS - SharePoint				
NEO DSFA - Individual Storage				
ETC DSFA - Individual Storage				
DrDS - Google Drive				
FA DS - DRACOON				
FAV MM- SharePoint				
FAV MM - OneDrive				
FA DS - Individual Storage				
+				
		X		
		Create document type from template Create document type	pe	

To do this, select Create Document Type.

### 4.2.5 Document Type Administration

#### 4.2.5.1 View

Regardless of the document type creation approach described in the previous points, the document type view is divided into the following areas:

Files App					🌲 🛛 📥 C 🚳 + Q, Search in this directory.
Create document typ	ce				
Document type name			Dokumenten-Tags		<b>/</b> +
Description				Add group	
Connection gene	ral document type				
Document Library Data   Dokume Dr. Dieter Steiner - D	onte DS Mentoring OmbH				
Path					
Name					
<ul> <li>Document type is</li> <li>Al prediction is ac</li> </ul>	active				
					Cancel Delete Create
		Create document type from template	Create document type		



# 4.2.5.2 Document type designation and description

In the upper left area of the document type view, it is possible to freely assign the name or designation of the document type and a description of it.

FilesApp		Manage document types Active document types	X Inactive document types		<ul> <li>LD C ()</li> <li>+</li> <li>Search in this directory</li> </ul>
Create document typ	90		Dokumenten-Tags		+
Description	ral document type	•	<u>}</u>	Add group	
Document Library Data   Dokume Dr. Dieter Steiner - (	Phte DS Mentoring GmbH				
Path					
Document type is	active				
Al prediction is ac	ctive O				Cancel Delete Create
		Create document type from template	Create document type	)	

If several document types are configured, it is recommended to use adequate abbreviations at the beginning of the document type designation. For example, with an abbreviation for the document library, the storage system, etc., as this makes it easier for users to assign it and the desired document type can be found quickly.

See here a real-world example with multiple document types:





The naming makes it easy to quickly find a document type relevant to a document or file.

# 4.2.5.3 Connection General Document Types

A connection can include several document libraries, for example a SharePoint environment that has one document library per Microsoft 365 group, such as per team.

If a document type is to be available for all document libraries of a connection, this can be activated via "Connection general document type".

In this case, the "Library Selection" tag is added to the right pane of the document type for selecting the document library when uploading a file.



Files App	Hew folder     Documents     X     Documents     X     Documents     X	Manage document types	inactive document types	×	🜲 💷 🛥 C 🍥 + Q, search in this directory.
Create document typ	De la				
Document type name			Dokumenten-Tags	÷ /)	<b>&gt;</b> +
Description				Add group	
Connection gener	ral document type				
Document Library Dr. Dieter Stein filesapp.storage.file	er - filesapp.com sapp.com				
Path					
Name					
Document type is	active				
Al prediction is ac	tive O				
					Cancel Delete Create
		Dr. Dieter Steiner - filesapp.com			
		FilesApp Management - Rechtl	che Dokumente seitens der FilesApp		
		Create document type from template	Create document type		

### 4.2.5.4 Selection of the Document Library

This area is used to select the document library in which the files are to be saved via this document type.

FilesApp		Manage document types Active document types	X		<ul> <li>III and C</li> <li>+</li> <li>Secret in this directory.</li> </ul>
Create document typ	e				
Document type name FAV-P Finance - Verträge			Dokumenten-Tags		+
Description Vertragsunterlagen, wie M	tiete, Leasing, NDA,			Add group	
	al document tune				
Document library Data I Document Dr. Dieter Steiner - Dr. Path	tto Muntaring OmbH				
Name					
<ul> <li>Document type is a</li> <li>Al prediction is act</li> </ul>	sctive Vve O				Cancel Delete Create
		FilesApp Management – Rechtlik Create document type from template	Create document type		

All integrated and authorized document libraries are displayed by selection.



FilesApp	Upload     Documents ×	nage document types Active document types	> Inactive document types	<	🌲 🛄 📥 C 🚳 + Q, Search in this directory.
Create document type					
Document type name FAV-P Finance - Verträge			Dokumenten-Tags		+
Description Vertragsunterlagen, wie Miete, Leasing, NDA,				Add group	
Connection general document type					
Decument Library Data   Dokumente Dr. Dieter Steiner - DS Mentoring OmbH					
Organization   Dokumente Dr. Dieter Steiner - fliesapp.com					
FAV-P FINANCE   Documents Max Muster - FAV Production					
FAV-P IT   Documents Max Muster - FAV Production					
Datenaustausch   Datenaustausch dr.steiner@filesapp.com					
FilesApp-Development   FilesApp-D dr.steiner@filesapp.com	evelopment				Cancel Delete Create
Finanzen   Finanzen dr.stelner@filesopp.com				Ĵ.	
M.Muster@fav-production.com   My Max Muster - FAV Production	files		Create document type		

Select the relevant document library. In our example, "FAV-P FINANCE".

Files App	+ New folder	Manage document types Active document types	Inactive document types	×	🜲 💷 🐟 C 🎯 + Q, Search in this directory.
Create document typ	9				
Document type name FAV-P Finance - Verträge			Dokumenten-Tags		+
Description Vertragsunterlagen, wie M	liete, Leasing, NDA,			Add group	
Connection genero	al document type				
Document Library FAV-P FINANCE   Max Mustor - FAV Pro	Documents duction				
Path					
Name					
<ul> <li>Document type is of</li> <li>Al prediction is act</li> </ul>	uctive ve ©				
					Cancel Delete Create
		FilesApp Management - FilesApp.com FilesApp Management - Rechtlik Create document type from template	che Dokumente seitens der FilesApp Create document type		



## 4.2.5.5 Document Tags

Tags are required for fast search, directory structure, and file naming convention of the files to be stored on the storage system using this document type.

These are configured in the right pane of the document type view.

	Manage document types × Active document types	X		<ul> <li>A DD C (i)</li> <li>+</li> <li>Q Search in this directory.</li> </ul>
Create document type				
Document type nome FAV-P Finance - Verträge		Dokumenten-Tags		(*)
Description Vertragsunterlagen, wie Miete, Leasing, NDA,			Add group	
Connection general document type				
Document library FAV-P FINANCE   Documents Max Muster - FAV Production				
Path				
Name				
Document type is active				)
Al prediction is active				
				Cancel Delete Create
	Dr. Dieter Steiner - filesapp.com	<u>i</u> D		
	FilesApp Manaaement - Rechtlic Create document type from template	che Dokumente seitens der FilesApp Croate document type		

Tags can be added via the plus icon at the top right of the marked area. If the document type has been taken from a template or if a document type has been copied, the adopted tags are already available.

Here is an example of tags, the <u>FilesApp Tags</u> section is dedicated in detail to the creation and configuration of tags.



		Manage document types				🌲 💷 🛥 C 🍥
Create document ty	be					
Document type name FAV-P Finance - Verträg	e		Dokumenten-Tags			
Description Vertraasunterlaaen, wie	Miete, Leasina, NDA,		1 Datum 3 Vertragspartner	¢ /	2 Bereich 4 Vertragsart	¢ /
			5 Laufzeit von	¢ /	6 Laufzeit bis	¢ /
Connection gene	ral document type					
Document Library FAV-P FINANCE	:   Documents			A	idd group	
Max Muster - FAV P	roduction					
Path						
Name						
Document type is	active					
Al prediction is ac	ctive O					
Scan all pages	3					
O Scan first 1	pages					
O Scan last 1	pages					
						Cancel Delete Create
		FilesApp Management - Recht Create document type from template	Create document type			

"Add group" can be used to create additional tag groups for a better overview.

0.0.0						~4
Edit document type						
Document type name FAV-P Fingangsrephnung (Workflow)	Dokumenten-Tags					+
	1 Status	\$	1	2 Fachbereich	\$	
Description Dokumententyp für Workflow Eingangsrechnung						
	Kopfdaten				+	
	1 Rechnung Nr. (FAV-P)	٢		2 Bestellnummer (FAV-P)	\$	
FAV-P FINANCE   Documents	3 Rechnung Nr. (Lieferant)	۰	1	4 Rechnungsdatum	٢	
	5 Lieferantenadresse	٢	1	6 Lieferantenname	٢	
Path	7 Rechnungsbetrag netto	\$	1	8 Rechnungsbetrag brutto	\$	
LIEFERANTEN > Lieferantenname - Lieferantenadresse > AUFTRÄGE	9 Leistungszeitraum von	\$		10 Leistungszeitraum bis	\$	
Name	11 Erstellt von	\$	1	12 Erstellt am	\$	
FAV-P EINKAUF Rechnung N. (FAV-P) - Eingangsrechnung - Lieferantenname - Rechnung N. (Lieferant)						
Document type is octive	Datenschutz				+	
Al prediction is active O	1 Klassifizierung	\$	1	2 Schutzbedarf	\$	
	Freigabe Fachbereich					
	1 Freigabestatus Fachbereich	\$	1	2 Kommentar Fachbereich	\$	
	3 Freigabe Fachbereich von	\$	1	4 Freigabe Fachbereich am	*	
					Cancel Delete	

Tag groups can be renamed via the change icon.

In this way, even complex structures and information can be clearly mapped.



#### 4.2.5.6 File Path

The path, i.e. the directory under which the files about this document type are to be stored on the selected storage system, can be configured in this field.

The path specification can consist of constants and variables - the tags - and a non-existent directory is automatically created by FilesApp on the storage system according to these specifications.

If document tags have been configured in the document type and declared as required tags, the path and file name can be configured with variables - the tag contents - see FilesApp Tags section.

		Manage document types			
Create document	type				
			Dokumenten-Tags		
FAV-P Finance - Vertre	âge		1 Datum	🏦 🧪 2 Bereich	
Dokumenten-Tag	gs		3 Vertragspartner	🄹 🧪 4 Vertragsart	* /
Datum			5 Laufzeit von	🔅 💉 6 Laufzeit bis	¢ /
Bereich					
Vertragspartner				Add group	
Vertragsart					
Select Directory	Add new level	X Close			
Name					
Document type	e is active				
Al prediction is	active O				
Scan all page	ges				
O Scan first 1	l pages				
🔿 Scan last 1	pages				
					Cancel Delete Create
		FilesApp Management - Rechtl Create document type from template	Create document type		

First, select the root directory of the document library.



	+ New folder 🛓 Upload	Manage document types	×			<b>.</b> 00	de C	(6)
Create document type	e							
Document type name FAV-P Finance - Verträge			Dokumenten-Tags					
			1 Datum	\$ 2	Bereich		۰.	
Dokumenten-Tags			3 Vertragspartner	\$	Vertragsart		۰.	
Datum			5 Laufzeit von	\$ 1	i Laufzeit bis		\$	
Bereich								
Vertragspartner								
Vertragsart				Add grou	ip			
Select Directory	Add new level	× Close						
I								
Name								
Document type is of	active							
Al prediction is action	ive O							
Scan all pages								
O Sogn first 1	Pageo							
	- -							
O Scan last 1	pages							
						Cancel		
		FilesApp Management - Rechtli	che Dokumente seitens der FilesApp					
		Create accument type from template	Create accument type					

								c 🍿
Create document typ								
Document type name FAV-P Finance - Verträg								+
(meanifold and)				1 Datum	<b>\$</b> / 2	Bereich	۵	1
Vertragsunterlagen, wie		Verzeichnisaus	wahl			fertragsart	\$	
Connection gene	ral document type	← Root						
Document Library		Finance						
FAV-P FINANCE Max Muster - FAV P		Fotos						
		General						
Path								
Name								
Document type is								
Al prediction is a								
Scan all pages					Übernehmen Abbrechen			
O Scan first 1								
O Scan last 1								
								reate

There is no need to create directories manually, FilesApp takes care of that. For the directory, select the top level of the directory and then proceed to the structure creation.



+ Hany tolder +	uplead Manage document types	×	4 00 🐽 C 🚳
Create document type			
Document type name FAV-P Finance - Verträge			
Theorem		1 Datum 🔅 🧨 2	Bereich 🌼 🇨
Vertragsunterlagen, wie Miete, Leasing, NDA,	Verzeichnisauswahl		lertragsart 🔅 🖊
Connection general document type	← /Finance		autzeit bis 🌣 🌶
	Eingangsrechnungen		
FAV-P FINANCE   Documents			)
Path			
Name		,	
		/	
Document type is active		J	
Al prediction is active O		▼	
Scan all pages		Übernehmen Abbrechen	
O Scan first 1 pages			
O Scan last 1 pages			
			Cancel Delate Create

Create document type	e						
Document type name FAV-P Finance - Verträge			Dokumenten-Tags				• +
			1 Datum	* /	2 Bereich	:	• 🖍
Dokumenten-Tags			3 Vertragspartner	÷ /	4 Vertragsart	:	• 🖊
Datum			5 Laufzeit von	<b>*</b> /	6 Laufzeit bis		• 🖍
Bereich							
Vertragspartner				Add	group		
Vertragsart							
L Select Directory	Add new level	X Close					
Finance >							
Name							
Document type is c	active						
Al prediction is acti	ve O						
Scan all pages							
🔿 Scan first 1	pages						
O Scan last 1	pages						
						Cancel Delete	Create
		FilesApp Management - Rechtli	che Dokumente seitens der FilesApp				
		Create document type from template	Create document type				



●●● ↓ New folder ★ Uplood	Manage document types	×		🌲 💷 📥 C 🛞
Create document type				
Document type name FAV-P Finance - Verträge		Dokumenten-Tags		+
		1 Datum	🔅 🧪 2 Bereich	¢ 🖉
Dokumenten-Tags		3 Vertragspartner	🔅 🧪 4 Vertragsart	• /
Datum		5 Laufzeit von	🌣 🖍 6 Laufzeit bis	¢ /
Bereich				
Vertragspartner			Add group	
Vertragsart				
🕒 Select Directory 🕻 🖿 Add new level 🔵	× Close			
Pindice 2				
Name				
Document type is active				
Al prediction is active O				
Scan all pages				
O Scan first 1 pages				
O Scan last 1 pages				
				Cancel Delete Create
	FilesApp Management - Rechtli	che Dokumente seitens der FilesApp		
	Create document type from template	Create document type		

By adding a new level, a directory level or a subdirectory can be created.

Create document type	9							
Document type name FAV-P Finance - Verträge			Dokumenten-Tags					+
Dokumenten-Taas			1 Datum 3 Vertragspartner	*	$\rightarrow$	2 Bereich 4 Vertragsart		* / * /
Datum			5 Laufzeit von	\$		6 Laufzeit bis		¢ /
Bereich								
Vertragspartner					Add gro	oup		
Select Directory	Add new level	× Close						
Finance Verträge								
Name								
Document type is c	active							
Al prediction is action is action is action is actional action	ve O							
Scan all pages								
O Scan first 1	pages							
🔿 Scan last 1	pages							
							Cancel	Delete Create
		FilesApp Management – Rechtli Create document type from template	Che Dokumente seitens der FilesAbb Create document type					

Then enter a constant or variable for the subdirectory. In this case, a constant labeled "Contracts", typed using the keyboard.



•••	+ New folder 🛓 Upload	Manage document types	×		🌲 00 🧆 C 🌘
Create document typ	De				
Document type name FAV-P Finance - Verträge	9		Dokumenten-Tags		
			1 Datum	2 Bereich	¢ /
Dokumenten-Tags			3 Vertragspartner	🚯 🥕 4 Vertragsart	* /
Datum			5 Laufzeit von	6 Laufzeit bis	¢ /
Bereich					
Vertragspartner				Add group	
Vertragsart				Add giodp	
Select Directory	Add new level	X Close			
Finance > Verträge >					
Name					
Document type is	active				
Al prediction is ac	tive O				
Scan all pages					
O Scan first 1	pages				
O Scan last 1	pages				
					Cancel Delete Create
		FilesApp Management - Rechtli	che Dokumente seitens der FilesApp		
		Create document type from template	Create document type		

This example adds another level.

Create document typ	pe							
Document type name FAV-P Finance - Verträge			Dokumenten-Tags					+
			1 Datum	\$	/	2 Bereich	1	• /
Dokumenten-Tags			3 Vertragspartner	\$	/	4 Vertragsart		• 🖉
Datum			5 Laufzeit von	٠		6 Laufzeit bis	1	• /
Bereich								
Vertragspartner					Add g	roup		
Vertragsart								
Select Directory	Add new level	× Close						
Finance > Verträge >	Vertragspartner							
Name								
Document type is	active							
Al prediction is act	tive O							
Scan all pages								
O Scan first 1	pages							
O Scan last 1	pages							
		Filesten Management - Deshti					Cancel Delete	Create
		Create document type from template	Create document type					

Now, in the example, a variable is set as the directory name with the tag "Contractor". This means that FilesApp dynamically places the file in the subdirectory based on the tag contents. If the directory does not yet exist, it will be created by FilesApp the first time a file with this document type is stored.



●●● + New folder ★ Upload	Manage document types	×		🜲 00 🐟 C 🍥
Create document type				
Document type name FAV-P Finance - Verträge		Dokumenten-Tags		+
		1 Datum	🌻 🧪 2 Bereich	¢ /
Dokumenten-Tags		3 Vertragspartner	4 Vertragsart	• /
Datum		5 Laufzeit von	6 Laufzeit bis	¢ /
Bereich				
Vertragspartner			Add group	
Select Directory Add new level	X Close			
Finance > Verträge > Vertragspartner > Vertragsatt				
Name				
Document type is active				
Al prediction is active O				
Scan all pages				
O Scan first 1 pages				
O Scan last 1 pages				
				Cancel Delete Create
	FilesApp Management - Recht Create document type from template	iche Dokumente seitens der FilesApp Create document type		

In this example, another subdirectory and the directory name have been added to it with the variable - i.e. the tag - "Contract type".

Quick reminder: only tags that are marked as required tags can be used as variables for the directory and file names - see FilesApp Tags section.

With the example, the following directory structure would result when uploading different contracts:

\\Connection\Dokumenten Bibliothek\Verzeichnisebenen\...

\\FAV Production \FAV-P FINANCE \Finance \Verträge \Vertragspartner \Vertragsart

#### Examples:

- \\FAV Production\FAV-P FINANCE\Finance\Verträge\VersicherungsAG\Betriebliche Altersvorsorge
- \\FAV Production \FAV-P FINANCE \Finance \Verträge \VersicherungsAG \Direktversicherung

\\FAV Production \FAV-P FINANCE \Finance \Verträge \VersicherungsAG \Unterstützungskasse

#### 4.2.5.7 Filename

Configuring the file name of a document type follows the same logic as creating the directories.

The file name can consist of constants and variables - the tags - and the file name is automatically assigned by FilesApp according to the specifications configured here in the document type.



If document tags have been configured in the document type and declared as required tags, the path and file name can be configured with variables - the tag contents - see FilesApp Tags section.

+ New folder 🛓 Upload	Managa document tunos	~		🔺 🛛 📥 C 🍥
Create document type				
Document type name FAV-P Finance - Verträge		Dokumenten-Tags		
		1 Datum	🌻 🧪 2 Bereich	÷ /
Vertragsunterlagen, wie Miete, Leasing, NDA,		3 Vertragspartner	🏟 🧪 4 Vertragsart	* /
		5 Laufzeit von	🔅 🧪 6 Laufzeit bis	¢ /
Connection general document type				
Document Library			Add group	
FAV-P FINANCE   Documents Max Muster - FAV Production				
Path				
Finance 🔉 Verträge 🁔 Vertragspartner 👔 Vertragsart				
Name		)		
<u></u>		)		
Document type is active				
Al prediction is active O				
Scan all pages				
O Scan first 1 pages				
O Scan last 1 pages				
				Cancel Delete Create
	Create document type from template	Create document type		

The options are available by selecting the file name field in the document type.

Create document type	9					
Document type name			Dokumenten-Tags			+
FAV-P Finance - Vertrage			1 Datum	• /	2 Bereich	* /
Description Vertragsunterlagen, wie M	iete, Leasing, NDA,		3 Vertragspartner	÷ /	4 Vertragsart	¢ /
			5 Laufzeit von	<b>*</b> /	6 Laufzeit bis	¢ /
Dokumenten-Tags						
Datum				Add gr	oup	
Bereich						
Vertragspartner						
Vertragsart						
		× Close				
🔄 Document type is a	ctive					
Al prediction is activ	ve ©					
Scan all pages						
O Scan first 1	pages					
O Scan last 1	pages					
						Cancel Delete Create
		Create document type from template	Create document type			

Everyone has the possibility to create the path and directory specifications according to their own ideas or the company or organization specifications.



Here is an example where the date is prefixed to the file name to also allow a structured view in a directory.

●●● + New folder ★ Upload	Manago dooumont tunoo	~		🌲 💷 🛥 C 🍥
Create document type				
Document type name FAV-P Finance - Verträge		Dokumenten-Tags		() (+)
Description		1 Datum	2 Bereich	¢ 🗸
Vertragsunterlagen, wie Miete, Leasing, NDA,		3 Vertragspartner	🔅 🧪 4 Vertragsart	¢ /
Connection general document type		5 Laufzeit von	6 Laufzeit bis	<b>₽</b> /)
Document Library			Add group	
FAV-P FINANCE   Documents Max Muster - FAV Production				
Path				
Finance 🕽 Vertröge 🗦 Vertragspartner 🗦 Vertragsart				
Name				
Datum FAV Production - Gereich - Vertragspartner - Vertragsart				
Document type is active				
Al prediction is active O				
Scan all pages				
O Scan first 1 pages				
O Scan last 1 pages				
				Cancel Delete Create
	Create document type from template	Create document type		

With the example, the following file names would result when uploading different contracts: Datum Connection - Bereich - Vertragspartner - Vertragsart

#### Examples:

2023-06-08 FAV Production - HR - VersicherungsAG - Betriebliche Altersvorsorge Max Muster.pdf 2023-06-08 FAV Production - HR - VersicherungsAG - Direktversicherung Max Muster.pdf 2023-06-08 FAV Production - HR - VersicherungsAG - Unterstützungskasse Max Muster.pdf

In this example, it would be a good idea to create a separate tag for the employee's name or a separate document type for HR topics. As noted, all configuration, path and file name assignment is up to the individual ideas of the users.

#### 4.2.5.8 AI prediction enabled

For recurring documents that have the same format with different values, such as invoices, contracts, statements, etc., the "AI recognition" can be activated and the artificial intelligence (AI) of FilesApp then trains when entering the tag contents in order to recognize the document type of other files and documents and to automatically fill the tags.

Directly when activating the AI, it is possible to select how many pages of a document should be searched by the FilesApp AI. In practice, it may take longer if, for example, a contract with 100 pages is to be searched by the AI. Often, the information relevant to the tags is already on the first pages. If you limit the number of pages, the system is faster to process.



The indexing for the search runs independently of this, it is irrelevant how much data and what amount of content is indexed. Indexing runs in the background and takes a certain amount of time, depending on the amount of files and content.

If AI recognition is activated, further options are available for the tags of the document type.

Description Vertragsunterlagen, wie Miete, Leasing, NDA,	Datum		¢ ¢	<ul><li>2 Bereich</li><li>4 Vertragsart</li></ul>	¢ ¢	
	Default value Date format vvvv-MM-dd			6 Laufzeit bis		
Document Ubrary FAV-P FINANCE   Documents Max Muster - FAV Production	2023-06-20 Path: Date format					
Path	2023-06-20	<b>)</b> 。				
Finance > Verträge > Verträgspartner > Verträgslart	Al Context Tag	。 «				
Datum FAV Production - Bereich - Vertragspartner - Vertragsart	<ul> <li>Required</li> <li>Workflow managed</li> </ul>	© ©				
<ul> <li>Document type is active</li> <li>Al prediction is active</li> </ul>	Over all search					
<ul> <li>Scan all pages</li> <li>Scan first 0 pages</li> </ul>		Close				
					Cancel Delete S	Save

For each Tag, it can be specified whether the AI prediction should be active for this.

In addition, a Tag is used to recognize the Document Type.

lit document type				
	Vertragspartner		🗘 🧪 2 Bereich	0/
	Default value		🔅 🧪 (4 Vertrogsort	Q /
	Select tog link		🔅 🆍 6 Laufzeit bis	
scument (Door)	Al prediction enabled	Ø		
S HAV-P FINANCE   DOCUMENTS Max Muster - FAV Production	Al Context Tag			
	Al key field			
nance > Verträge > Verträgspartner > Verträgsart	Required			
	Workflow managed			
Datum FAV Production - Bereich - Vertragspartner - Vertragsart	Over all search			
Document tura is activa	Save history			
Document type is donve	EXIF detection			
		Close		
Scan first 0 pages				
O Scan last 0 pages				
				Cancel Delite Sa



This is what the AI key field is for. Since the document type is to be recognized, it is advantageous to use a tag for it, which enables the most unique assignment possible.

For example, this could be the contractual partner or an invoice sender, since predominantly the same process comes from a specific sender. In the case of outgoing documents, for example, it makes sense for the recipient to declare it as an AI key field.

When configuring a document type, the outline of the AI key field in the color "Lime" supports it in order to recognize it directly.

+ New folder	Upload Manage document types	×		🜲 00 🐟 C 🍥
Edit document type				
Document type name FAV-P Finance - Verträge		Dokumenten-Tags		+
Description		1 Datum	2 Bereich	* /
Vertragsunterlagen, wie Miete, Leasing, NDA,		3 Vertragspartner	4 Vertragsart	¢ /
Connection general document type	0			
Document Library FAV-P FINANCE   Documents Max Muster - FAV Production			Add group	
Path				
Finance > Verträge > Vertragspartner >	Vertragsart			
Name				
Datum FAV Production - Bereich - Vertrag	spartner - Vertragsart			
Document type is active				
Al prediction is active O				
Scan all pages				
O Scan first 0 pages				
O Scan last 0 pages				
				Cancel Delete Save
	Create document type from template	Create document type		



#### 4.3 FilesApp Tags

### 4.3.1 Tag Configuration

For the creation and configuration of the tags, a separate administration area is available in the settings of the FilesApp Desktop Apps.



Select the settings area by clicking on the avatar in the upper right corner of FilesApp window.

$\sim$	+ New folder 🛓 Uplood	🜲 00 🗢	с 🥘
$\bigcirc$	Documents X     Documents X	🔆 light 🔸 System	🗲 Dark
FilesApp		Language	•
Q Global search	□ D File name ↓ Size 1, File last mo	Settings	
🗲 Smart Upload	C General 347.93 KB 247.20		
Connections	C Fotos 12.85 MB 09.06.202	Sign out	
Computer	C Finance 2.25 MB 18:10:202	2 09:05 SS	SS
DSM DS - SharePoint			
DSM DS - OneDrive			
FA DS - SharePoint			
NEO DSFA - Individual Storage			
ETC DSFA - Individual Storage			
DrDS - Google Drive			
FA DS - DRACOON			
FAV MM- SharePoint			
EA DS - Individual Storage			
+			
·			



## Select Settings.

	+ New folder 🛨 Upload		<b>A</b> 00 <b>4</b>	• c 🛞
ĆĎ	Documents x     Occuments x		🔆 Ught 🛛 🔶 Syste	m 🕒 Dark
FilesApp	K > FAV-P RNANCE   Documents		Language	
Q Global search	C File name	😑 Manage libraries	🔅 Settings	Þ
✦ Smart Upload	General	Manage document types	Sign out	_
Connections	E Fotos	+ Manage tras	J sign out	_
Computer	C Finance	+ manage (ags	2 09:05 55	SS
DSM DS - SharePoint		d≟ More settings		
DSM DS - OneDrive		constent		
FA DS - SharePoint		S About FilesApp		
NEO DSFA - Individual Storage				
Dupo, Occurie Date				
FAV MM- SharePoint				
FAV MM - OneDrive				
FA DS - Individual Storage				
+				

Select Manage tags.



The tags to which the user has access are then displayed and the tags can be filtered via the search field.



## 4.3.2 Create Tags

A new tag can be created via the settings by selecting "Create tag".



Or during the creation of a document type when the + symbol is selected.

Create document type	FAV-P FINANCE   Documenta				Q_ Search in this directory
Document type name FAV-P Finance - Verträge			Dokumenten-Tags		
Description Vertragsunterlagen, wie M	iete, Leasing, NDA,			Add group	
Connection genero	l document type				
Document Library FAV-P FINANCE   Max Muster - FAV Prov	Documents Juction				
Path					
Name					
Document type is c	ictive				)
Al prediction is active	ve O				
					Cancel Delete Create
		Dr. Dieter Steiner – filesapp.com			
		FilesApp Management - Recht Create document type from template	iche Dokumente seitens der FilesApp Create document type		





A tag can be used in different types of documents. A change to a tag that is often used in document types thus affects all document types.

# 4.3.3 Tag Types

In FilesApp Tags, the information about a file is stored in FilesApp.

Tag types are available in various formats and the individual requirements for file and document management can be covered:

- Text
- Checkbox (Yes/No selection field)
- Number without decimal places
- Number with decimal places
- Date
- Date and Time
- Time
- Selection
- Label

After selecting Create Tag as described above, these tag types are available for selection, can be created and then configured in the relevant document types:



	+	New f	folder 🛕 U	pload		lanaa		~					~			I	<b>).</b> 00	-	C (	õ
						nanag	e laç	gs												
FilesApp																				
Q Global search							Adres	ssat/Be	əhörde/l	/Institutio										4
🔸 Smart Upload						s														
Connections					Cre	eate to	ag													
Computer DSM DS - SharePoint					Doe		brary <b>Dr. Die</b> filesapp	ieter Ste p.storage	t <b>einer – fi</b> e.filesapp.c	filesapp. a.com	o.com									
FA DS - SharePoint					Te	ext put for wo														
ETC DSFA - Individual Storage					Cl Pro	heckbo resents a b	<b>x</b> box that			or unchecke										
DrDS - Google Drive					Nu Us	lumber v sed for typ	withou ing in wi	ut decir vhole num	mal plac nbers only	aces ly										
FAV MM - OneDrive					Nu Us	lumber v sed for typ	with de	l <b>ecimal</b> iumbers v	I places with a decir	I <b>S</b> cimal point										
FA DS - Individual Storage					Do Us	ate sed for cho														
+					De Us	ate and	<b>i time</b> posing a													
					Ti Us	ime sed for cho														
					Se	<b>elect</b> resents a li														
					LC	abels sed for add		ultiple lab		tegories										
										Create	te tag									

### 4.3.3.1 Text Tags

Text tags cover the desired information about a file in text form. This can be tags, for example, with the names of addressees, projects, areas, etc.

# 4.3.3.1.1 Text Tag Creation

When creating a tag, select the tag type "Text".



	+	New folder 💧 Upload	Manage tags	×		<b>4</b> 00	• c 🤅	Ì
FilesApp								
Q Global search			Adressat/Behörde/Institution					5
✦‡ Smart Upload			Data   Dokumente Dr. Diatar Stainar - DS Mantoring GmbM					
Connections			Create tag					
Computer DSM DS - SharePoint DSM DS - OneDrive			Document Library Dr. Dieter Steiner - filesapp.com filesapp.storoge/filesapp.com					
FA DS - SharePoint								
ETC DSFA - Individual Storage			Description					
DrDS - Google Drive								
FAV MM - SharePoint :			Text Input for words or sentences					
FA DS - Individual Storage			EXIF detection	o				
+				Cancel Create				
			Bereich Development   Dokumente Dr. Dieter Steiner - filesapp.com					
			Bereich FAV-P IT   Documents Max Muster - FAV Production					
			Create tag					

A name and a description can be assigned for each tag.

Text tags can be automatically filled with <u>EXIF information</u> from the photos by FilesApp AI if desired.

To do this, select "EXIF detection" and select the EXIF field from the list.

It is recommended that you create your own document types for the Photos section.

			Manage tag		×				0
			Manage rag						
FilesApp									
Q Global search			Adres:	sat/Behörde/Institution					η.
✦‡ Smart Upload			Create tag						
Connections			Document Library						
Computer			filesapp	storage.filesapp.com					
DSM DS – SharePoint									
DSM DS - OneDrive			Name						
FA DS - SharePoint									
NEO DSFA - Individual Storage			Description						
ETC DSFA - Individual Storage									
DrDS - Google Drive			Text						
FAV MM - SharePoint			input for words or	sentences					
FAV MM - OneDrive		(				<u>۱</u>			
FA DS - Individual Storage			S EXIF dete	ction	©				
FA DSFA - DRACOON			EXIF value						
+									
			Camera manufactu						
			Image Model Camera model						
			Image Orientation						
			Image XResolution	und la					
				Create tag					



# 4.3.3.1.2 Text Tag configuration in Document Type

If a text tag is created and inserted into a document type, the following options are available when AI recognition is activated.

In the example, the Text field is labeled "Range":

+ New felder 🟦 Upload	is dealineant turses		J	🜲 💷 🐟 C 🚳
Edit document type				
		1 Datum	🔅 🧪 2 Bereich	¢ /
Vertragsunterlagen, wie Miete, Leasing, NDA,	Bereich		4 Vertragsart	¢ /
	Default value			
Document library	Select tag link			
FAV-P FINANCE   Documents Max Muster - FAV Production	Al prediction enabled			
	Al Context Tag	0		
Finance 📎 Verträge 📎 Verträgspartner 🕥 Verträgsart	🛃 Required			
	Workflow managed			
Datum FAV Production - Bereich - Vertragspartner - Vertrags	Over all search	Ø		
	Save history	O		
		Close		
				Cancel Delete Save

- Default value (Default)

here you can specify a default value for the tag content

- Select Tag Link
  - If two tags are in relation to each other, they can be linked to each other and FilesApp saves the assigned combinations so that they can be automatically specified from the second use in a document type
  - For example, if the customer name and his customer number are carried for a customer in a document type, the customer number in the corresponding tag would be automatically filled with linked tags when the customer name is selected
- Al prediction enabled

If this option is active, the AI of FilesApp learns based on the information and automatically fills in the values in the tags on that basis

- Al Context Tag
  - this means that based on input by the user, FilesApp maps what was additionally entered for a particular file and suggests the content based on when the combination of the recognized document and the inputs is recognized



- an example could be that in the case of an incoming invoice from a certain company, an indication is to be made in the document type that is not textually available on the invoice, for example the desired specification of a currency
- Required Tag
  - if this is activated, the content of this tag must be filled before the user can upload the file
  - on the one hand, the color of the tag changes to blue to make this visually clear
  - on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
  - this option is used to specify that the content of the tag can only be changed by a workflow
  - for example, in an incoming invoice process, tags could be filled by a workflow, for example with the indication of who gave the approval or when
  - if this option is activated, the tag content cannot be changed by the users
  - all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed and made available for selection during Smart Upload
- Save history

if this option is active, all contents of this tag from all files with this document type will be displayed and made available for selection during Smart Upload

 Remove Tag this removes the tag from the document type, but does not delete the tag itself

# 4.3.3.2 Checkbox (Yes/No selection field) Tags

Checkboxes can be used to create Yes/No or True/False queries, for example, this could be an indication of whether an invoice has been paid or whether it has been released.

# 4.3.3.2.1 Checkbox Tag Creation

When creating a tag, select the tag type "Checkbox".


	+ 1	lew fol	ider 🛕 Upload			). OO -	a C 🚳
				Manage tags X			+
FilesApp							lirectory
Q Global search				Adressat/Behörde/Institution			Edited by 🔿
🔶 Smart Upload				Data   Dokumente Dr. Dieter Steiner - DS Mentoring GmbH			SA
Connections							SS
Computer				Create tag			
DSM DS - SharePoint				Document Library			55
DSM DS - OneDrive				filesapp.storage.filesapp.com			
FA DS - SharePoint							
NEO DSFA - Individual Storage							
ETC DSFA - Individual Storage							
DrDS - Google Drive				Description			
FAV MM - SharePoint							
FAV MM - OneDrive				Checkbox Presents a box that can be checked or unchecked to indicate a yes/no or true/false			
FA DS - Individual Storage							
FA DSFA - DRACOON							
+				Cancel			
				Dr. Dieter Steiner – filesapp.com			
				Bereich Development   Dokumente Dr. Dieter Steiner - Filesapp.com			
				FAV-PIT   Documents Max Muster - FAV Production			
				Create tag			

A name and a description can be assigned for each tag.

4.3.3.2.2 Checkbox Tag configuration in the Document Type

If a checkbox tag is created and inserted into a document type, the following options are available when AI recognition is activated.

In the example, the checkbox tag is labeled "Invoice paid yes/no":



Edit document type							
Decument library			1 Rechnungsbetrag netto	0	. /	2 Mehrwertsteuer in Prozent	¢ /)
FAV-P FINANCE   Documents Max Muster - FAV Production			3 Rechnungsbetrag brutto	\$	1	4 Währung	\$ /
Path							
Finance 📀 Eingangsrechnungen			Leistungsdatum oder -;				/ +
Name	Rechr	nung bezahlt ja/nein		4		2 Enddatum Leistungszeitraur	n 🗘 🖊
Rechnungsdatum (Lieferantenname) - Rechnungs-Nr. (Rechnungsn		Default value					
Document type is active	Ο	Al prediction enabled					(*) (+) ()
Al prediction is active ③	Ο	Al Context Tag				2 Zahlungshedingungen	
Scan all pages	Ο	Required	Ø	-	. 1	4 Rechnung bezahlt ja/nein	¢ /
O Scan first 1 pages	Ο	Workflow managed	0	\$		6 Rechnung bezahlt Datum	¢ /
O Scan last 1 pages	Ο	Over all search					
			Close			2 Buchungskontobezeichnung	
			3 Kostenstellennummer 🕫	4	. 1	4 Kostenstellenbezeichnung	» ¢ /
			Datenschutz und Daten	nsicherhei			+
						Can	Cel Delete Save

- Default Value a default value for the content tag can be specified here
- AI prediction enabled if this option is active, the AI of FilesApp learns based on the information and automatically fills in the values in the tags based on that
- Al Context Tag

this means that based on input by the user, FilesApp maps what was additionally entered for a particular file and suggests the content based on when the combination of the recognized document and the inputs is recognized

- Required Tag
  - if this is activated, the content of this tag must be filled before the user can upload the file
  - on the one hand, the color of the tag changes to blue to make this visually clear
  - on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
  - this option is used to specify that the content of the tag can only be changed by a workflow
  - for example, in an incoming invoice process, tags could be filled by a workflow, on the one hand with the indication of who gave the approval or when
  - if this option is activated, the tag content cannot be changed by the users
  - all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types if this option is active and the tag is used in several document types, the history of the



tag contents from all entries of the document types is displayed and made available for selection during Smart Upload

- Remove Tag this removes the tag from the document type, but does not delete the tag itself

#### 4.3.3.3 Number Tags without decimal places

In order to be able to specify formats for numbers, this tag is available for integers.

#### 4.3.3.3.1 Number Tag without decimal place creation

When creating a tag, select the tag type "Number without decimal places".

			N	Manage tags			×				(6)
				Manage tags							+
FilesApp											
Q Global search			1	Adressat/Behörde/Instit							η,
🔶 Smart Upload				Data   Dokumente Dr. Dieter Steiner - DS Mentoring							
Connections			Cre	reate tag							
Computer DSM DS - SharePoint DSM DS - OneDrive DSM DS - OneDrive SA DS - SharePoint				Document Library Dr. Dieter Steiner – filesc filesapp.u-know.eu	app.com						
NEO DSFA - Individual Storage				Name							
ETC DSFA - Individual Storage			De	Description							
FAV MM - SharePoint     FAV MM - OneDrive     FA DS - Individual Storage				type Number without decimal place Used for typing in whole numbers only	s						
FA DSFA - DRACOON +						Cancel C					
				Dr. Dieter Steiner – filesapp.com							
				Bereich Development   Dokumente Dr. Dieter Steiner - filesapp.com							
				Bereich FAV-P IT   Documents Max Muster - FAV Production							
				Cr	eate tag						

4.3.3.3.2 Number without decimal places Tag configuration in the Document Type

If a number without a decimal place tag is created and inserted into a document type, the following options are available when AI recognition is activated.

In the example, the number without the decimal place tag is labeled "Buchungskontonummer":



Edit document type				
Ear document type				
Finance 📀 Eingangsrechnungen		Leistungsdatum oder -	zeitraum	
Name		Lieferdatum oder Startdatum Leistungszeitraum	¢ /	2 Enddatum Leistungszeitraum 🔅 🇨
Rechnungsdatum Lieferantenname - Rechnungs-Nr. Rechnungsnu	Production - CALL Draduction - Ca			
Document type is active	Buchungskontonummer			
Al prediction is active O	Default value			
Scan all pages	Buchungskontobezeichnung		\$ /	2 Zahlungsbedingungen 🌼 🧨
			⇒ <i>×</i> ∕	4 Rechnung bezahlt ja/nein
	Al prediction enabled	٥		
S counter pages	Al Context Tag	0		
	Required	Ø		+
	Workflow managed		\$	🖉 2 Buchungskontobezeichnung 😄 🛛 🎓
	Over all search		\$ /	🖌 4 Kostenstellenbezeichnung ∞ 🔅 🧨
	Save history	٥		
		Close	sicherheit	
		I NUSSIIKUUUI	\$ ,	2 Schutzklasse 🌣 🇨
				dd group
				Cancel Delete Save

- Default value

here you can specify a default value for the tag content

- Select Tag Link
  - If two tags are in relation to each other, they can be linked to each other and FilesApp saves the assigned combinations so that they can be automatically specified from the second use in a document type
  - For example, if the customer name and his customer number are carried for a customer in a document type, the customer number in the corresponding tag would be automatically filled with linked tags when the customer name is selected
- AI prediction enabled
  - If this option is active, the AI of FilesApp learns based on the information and automatically fills in the values in the tags on that basis
- Al Context Tag
  - this means that based on input by the user, FilesApp maps what was additionally entered for a particular file and suggests the content based on when the combination of the recognized document and the inputs is recognized
  - an example could be that in the case of an incoming invoice from a certain company, an indication is to be made in the document type that is not textually available on the invoice, for example the desired specification of a currency
- Required Tag
  - if this is activated, the content of this tag must be filled before the user can upload the file



- on the one hand, the color of the tag changes to blue to make this visually clear
- on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
  - this option is used to specify that the content of the tag can only be changed by a workflow
  - for example, in an incoming invoice process, tags could be filled by a workflow, for example with the indication of who gave the approval or when
  - if this option is activated, the tag content cannot be changed by the users
  - all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types

if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed and made available for selection during Smart Upload

- Save history if this option is active, all contents of this tag from all files with this document type will be displayed and made available for selection during Smart Upload
- Remove Tag this removes the tag from the document type, but does not delete the tag itself

# 4.3.3.4 Number Tag with decimal places

To be able to specify formats for numbers, this tag is available for numbers with decimal places.

# 4.3.3.4.1 Number Tag with decimal places creation

When creating a tag, select the tag type "Number with decimal places".



	-E No	a falch	ar di Histoari							é 0	1 ~	0.6
$\sim$					Manage tags							
FilesApp												
Q. Global search					Adressat/Behörde/Institut	on						
$arphi^+_{ar{+}}$ Smart Upload				С	Create tag							
Connections					Document Library							
Computer					Dr. Dieter Steiner – filesapp filesapp.u-know.eu	o.com						
DSM DS - SharePoint												
DSM DS - OneDrive												
FA DS - SharePoint												
NEO DSFA - Individual Storage					Description							
ETC DSFA - Individual Storage												
DrDS - Google Drive												
FAV MM - SharePoint 1					Number with decimal places Used for typing in numbers with a decimal pa							
FAV MM - OneDrive												
FA DS - Individual Storage					Format Thousands separator: '' - Decimal	separator:';						
FA DSFA - DRACOON					Erweiterte Formatierung ####,####	Anzahl Dezimaistellen 2						
						Car	ncel Crec					
					Development   Dokumente Dr. Dieter Steiner - filesapp.com							
					Bereich FAV-P IT   Documents Max Muster - FAV Production							
					Creat	e tag		3				

The type of separators, as well as the 1,000 separator and the number of decimal places can be set.

Tags for financial figures, such as net or gross invoice amount, VAT amount, etc., are frequently used here.

# 4.3.3.4.2 Number with decimal places tag configuration in the document type

If a number with decimal places tag is created and inserted into a document type, the following options are available when AI recognition is activated.

In the example, the number with decimal places tag is labeled "Rechnungsbetrag brutto":



dit document type								
Document type name EAV-P Finance – Financestechnung			Dokumenten-Tags					
			1 Rechnungsnummer	0		2 Ueferantenname	×	. 1
Description Eingangsrechnungen ohne Workflow			3 Rechnungsdatum	\$	1			
	Rechr	nungsbetrag brutto						
	Defau	ult value	×	:) *	1	2 Mehrwertsteuer in Prozen	nt 🕱	3 1
FAV-P FINANCE   Documents Max Muster - FAV Production		Al prediction enabled	G		1	4 Währung		3 /
Path	Ο	Al Context Tag	G					
		Required	C					
	Ο	Workflow managed	G	•	1	2 Enddatum Leistungszeitr	aum 🕻	2 /
Rechnungsdatum (Leferantenname) - Rechnungs-Nr. Rech		Over all search	G					
	0	Save history	G					
Document type is active								
Al prediction is active O			Clas	*	1	2 Zahlungsbedingungen	a a a a a a a a a a a a a a a a a a a	3 /
Scan all pages				Ó	1	4 Rechnung bezahlt ja/nei	n <b>X</b>	3 /
			5 Zahlbetrag	\$	1	6 Rechnung bezahlt Datum	n <b>1</b>	2 1
			Finanzbuchhaltungs					
								Save

- Default value

here you can specify a default value for the tag content

- Select Tag Link
  - If two tags are in relation to each other, they can be linked to each other and FilesApp saves the assigned combinations so that they can be automatically specified from the second use in a document type
  - For example, if the customer name and his customer number are carried for a customer in a document type, the customer number in the corresponding tag would be automatically filled with linked tags when the customer name is selected
- AI prediction enabled

If this option is active, the AI of FilesApp learns based on the information and automatically fills in the values in the tags on that basis

- Al Context Tag
  - this means that based on input by the user, FilesApp maps what was additionally entered for a particular file and suggests the content based on when the combination of the recognized document and the inputs is recognized
  - an example could be that in the case of an incoming invoice from a certain company, an indication is to be made in the document type that is not textually available on the invoice, for example the desired specification of a currency
- Required Tag
  - if this is activated, the content of this tag must be filled before the user can upload the file



- on the one hand, the color of the tag changes to blue to make this visually clear
- on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
  - this option is used to specify that the content of the tag can only be changed by a workflow
  - for example, in an incoming invoice process, tags could be filled by a workflow, for example with the indication of who gave the approval or when
  - if this option is activated, the tag content cannot be changed by the users
  - all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed and made available for selection during Smart Upload
- Save history if this option is active, all contents of this tag from all files with this document type will be displayed and made available for selection during Smart Upload
- Remove Tag this removes the tag from the document type, but does not delete the tag itself

# 4.3.3.5 Date Tags

Dates can be read out in many formats in FilesApp. The configuration of the date tags is done after selecting the format during tag creation in the configuration in the document type.

# 4.3.3.5.1 Date Tag Creation

When creating a tag, select the tag type "Date".



	+ Nev	w folder 💧 👲 Uploc	d	Manage tags	Ý	1	). OO (	• C 🛞
				Manage tags				+
FilesApp								lirectory
Q Global search				Adressat/Behörde/Institution				Edited by $\uparrow_{\downarrow}$
🛟 Smart Upload				Data   Dokumente Dr. Diater Stainer - DS Mantaring Cambil				SA
Connections				Create tag				SS
Computer				Document Library Dr. Dieter Steiner – filesapp.com				SS
DSM DS - OneDrive								
FA DS - SharePoint				Name				
NEO DSFA - Individual Storage								
ETC DSFA - Individual Storage				Description				
DrDS - Google Drive				Type				
FAV MM - SharePoint				Date				
FAV MM - OneDrive								
FA DS - Individual Storage								
FA DSFA - DRACOON				EXIF detection	٥			
+					Cancel Create			
				Bereich Development   Dokumente Dr. Dieter Steiner - filesapp.com				
				Bereich FAV-P IT   Documents Max Muster - FAV Production				
				Create tag				

Date tags can be automatically filled with <u>EXIF information</u> from the photos by FilesApp AI if desired.

To do this, select "EXIF detection" and select the EXIF field from the list.

It is recommended that you create your own document types for the Photos section.

# 4.3.3.5.2 Date Tag configuration in the Document Type

If a date tag is created and inserted into a document type, the following options are available when AI recognition is activated.

In the example, the date tag is labeled "Rechnungsdatum":



0.00					10
Edit document type					
Document type name FAV-P Finance - Eingangsrechnung					
		1 Rechnungsnummer	¢ ,	2 Lieferantenname	\$ /
Description Eingangsrechnungen ohne Workflow	Rechnungsdatum		\$ /		
Connection general document type	Default value				+
Document Library	Date format		¢.	2 Mehrwertsteuer in Prozent	¢ /
FAV-P FINANCE   Documents	2023-06-25		\$ ,	🔦 4 Währung	¢ /
	Path: Date format				
Path	уууу-мм-аа				
Finance () Eingangsrechnungen	Al prediction enabled	Ø			+ …
Name	Al Context Tag	0	¢.,	2 Enddatum Leistungszeitra	um 🌣 🌶
Rechnungsdatum Ueferantenname - Rechnungs-Nr. Rechnungsn					
Document type is active	Workflow managed	0			
Al prediction is active O	Over all search				
Scan all pages			₩ 4	2 Zahlungsbedingungen	<b>\$</b>
			¢ /	4 Rechnung bezahlt ja/nein	<b>\$</b> /
O Scan first 1 pages		Close	¢ ,	6 Rechnung bezahlt Datum	¢ /
O Scan last 1 pages					
		Finanzbuchhaltungsda			( / )( + )( … )
					ancel Delete Save

- Default value

a default value for the content tag can be specified here

- Date Format
  - the desired date format can be configured individually
  - Default values are available for selection when the field is activated

edit document type						
		1 Rechnorigenommer	Ċ.	E	2 Lieferantername	\$ /)
	Rechnungsdatum		\$	1		
Document Upring.	Date format yyyy-MM-dd		\$	1	2 Mehnwertsteuer in Prozent	\$ /
FAV-P FINANCE   Documents Max Muster - FAV Production	2023-06-26		\$	1	4 Wölvung	¢ /
	уууу-MM-dd	2023-06-25				
	dd.MM.yy	25.08.23				
	dd.MM.yyyy	25.06.2023				
	dd-MMM-yy		\$	1	2 Enddatum Leistungszeitraum	¢ /
(Rechnungsdatum) (Delevantername) - Rechnungs-Nr. (Rechnungen	dd-MM-yy	25-06-23				
Document type is active	dd-MM-уууу	25-06-2023				
Al prediction is active 0	dd-MMM-yyyy					
	MM/dd/yy	06/25/23	٥		2 Zahlungsbedingungen	¢ /
	MM/dd/vvvv	06/25/2023	\$	1	4 Rechnung bezahlt ja/nein	\$ /
	in boalan	na los los	\$	1	6 Rechnung bezahlt Datum	¢ /
	yy/mm/uu	antonian				
	yyyy/MM/dd	2023/06/26				
	MMM dd yy					×    +
	EEE, MMMM dd yy	Sun, June 25 23				Save

- as the format is specified, it is displayed in the corresponding tag and if the date tag is used as a variable for the file name in the file name
- Path Date Format
  - the date tag can be used at the same time to specify it in a directory. It may be desirable to use only a part of it, for example a folder structure that is created by year (yyyy) or year and month (yyyy-MM) and should be sorted



- the desired date format can be configured individually
- Default values are available for selection when the field is activated

• • •					
					(*)
		1 Rechnungsnummer	\$	1	2 Lieferantenname 🔯 🧨
Electrono Eingangsrechnungen ohne Workflow	Rechnungsdatum		\$	1	
	Date format		\$	1	2 Mehrwertsteuer in Prozent 🔅 🧨
FAV-P FINANCE   Documents Max Muster - FAV Production	2023-08-25		\$	1	4 Wàhrung 🏛 🧨
Path	Path: Date format yyyy-MM-dd				
	yyyy-MM-dd	2023-06-25	_	_	
	dd.MM.yy	25.06.23	\$		2 Enadatum Leistungszeitraum 🙀 🖌
Rechnungsdatum Lieferantenname - Rechnungs-Nr. Rechnungen	dd.MM.yyyy	25.06.2023			
	dd-MMM-yy				
Al prediction is active O	dd-MM-yy				
	dd-MM-yyyy		\$		2 Zahlungsbedingungen 🌼 🧨
	dd-MMM-yyyy	25-Jun-2023	\$	$\leq$	4 Rechnung bezahlt ja/nein 😨 🗸
	MM/dd/w	06/25/23			6 Rechnung bezahlt Datum
	мм/аа/уууу	06/20/2023			
	yy/MM/dd	23/08/25			
	yyyy/MM/dd	2023/08/25			Cancel Dolete Save

- as the format is specified, it is displayed or inserted in the path name
- AI prediction enabled
  - if this option is active, the AI of FilesApp learns based on the information and automatically fills in the values in the tags based on that
  - when transferring EXIF information from photos, this selection is not available
- Al Context Tag
  - this means that based on input by the user, FilesApp maps what was additionally entered for a particular file and suggests the content based on when the combination of the recognized document and the inputs is recognized
  - an example could be that in the case of an incoming invoice from a certain company, an indication is to be made in the document type that is not textually available on the invoice, for example the desired specification of a currency
- Required Tag
  - if this is activated, the content of this tag must be filled before the user can upload the file
  - on the one hand, the color of the tag changes to blue to make this visually clear
  - on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
  - this option is used to specify that the content of the tag can only be changed by a workflow
  - for example, in an incoming invoice process, tags could be filled by a workflow, for example with the indication of who gave the approval or when
  - if this option is activated, the tag content cannot be changed by the users
  - all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner



- Search across all document types if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed and made available for selection during Smart Upload
- Remove Tag this removes the tag from the document type, but does not delete the tag itself

# 4.3.3.6 Date and Time Tags

Date and time information can be read out in many formats in FilesApp. The configuration of the date and time tags is done after selecting the format during tag creation in the configuration in the document type.

#### 4.3.3.6.1 Date and Time Tag Creation

When creating a tag, select the tag type "Date and time".

•••		Manage tags	×			• C 🛞
						+
FilesApp						ectory
Q Global search		Adressat/Behörde/Institution				Edited by 1
♦‡ Smart Upload		Data   Dokumente Dr. Diatar Stainar - DS Mentoring GmbH				SA
Connections		Create tag				SS
Computer DSM DS - SharePoint DSM DS - OneDrive		Document Library Dr. Dieter Steiner – filesapp.com filesapp.u-know.eu				SS
FA DS - SharePoint						
ETC DSFA - Individual Storage		Description				
FAV MM - SharePoint		Type <b>Date and time</b> Used for choosing a date and a specific time				
FA DS - Individual Storage FA DSFA - DRACOON +		EXIF detection	Cancel Create			
		Bereich Development   Dokumente Dr. Dieter Steiner - Besapp.com Bereich Bereich				
		Max Muster - FAV Production Create tag				

Date and time tags can be automatically filled with <u>EXIF information</u> from the photos by FilesApp AI if desired.

To do this, select "EXIF detection" and select the EXIF field from the list.

It is recommended that you create your own document types for the Photos section.



Edit document type				
Document type name Steiner privat – Fotos	Edit tag			
	Document library  Data   Dokumente  Dr. Deter Steiner - DS Mentoring GmbH	•	2     Jahr       2     Jahr       4     Thema/Bereich       2     6       8     6	¢ / ¢ /
	Nome Datum (EXIF)			
Document Library Data   Dokumente Dr. Dieter Steiner - DS Mentoring GmbH	Description			
Path Privat > Fotos > John > Datum (EXIF) Anlass > 11	Type <b>Date and time</b> Used for choosing a date and a specific time			
Name	S EXIF detection	0		
Datum (EXF) Foto Anlass - Thema/Bereich - Fotograf	EXIF value			
	Delete			
				Cancel Delete Save

An example with the transfer of date and time from an EXIF information.

4.3.3.6.2 Date and Time Tag configuration in the Document Type

If a Date and Time Tag is created and inserted into a document type, the following options are available when AI recognition is activated.

In the example, the Date and Time field is labeled "Datum (EXIF)":



●●● + New folder ★ Upload	a document types Inactive document types	×	4 00 a c 📦 +
Edit document type			
Document type name	Dokumenten-Tags		
steiner privat - Potos	Datum (EXIF)	🗘 🧨 2 Jahr	¢ /)
Description	Default value	4 Therna/Bereich	¢ /)
Connection general document type	Date and time format yyyy-MM-dd HH:mm' Uhr'	6 KI Tog	\$ /
Door smint Uncary. Data   Dokumente Dr. Didets' Steller - DS Montoring GmbH	2023-08-25 2017 Unv Path: Date and time format yyyy-MM-dd 2023-08-25		
Path	Required O		
Privat 🕉 Fotos 📎 Jahr 🔅 Datum (EXIF) Anlass 📎 Thoma/E	Workflow managed		
Name	Over all search O		
Datum (EXF) Foto Anlass - Thema/Bereich - Fotograf			
Document type is active	Close	)	
Al prediction is active O			
			Cancel Delete Save
Create	document type from template Create document type	0	

- Default value

a default value for the content tag can be specified here

- Date and time format
  - the desired date and time format can be configured individually
  - default values are available for selection when the field is activated

Manazan	
COD I teceneral X I form	
FilesApp	
Edit document type	
Document type name Dokumenten-Tags	
Datum (EXIF)	¢ /)
Description Default value	¢ /)
Date and time format	¢ /)
Connection general document type     yyyy-MM-dd Hitmm <sup>1</sup> Uhr	
Cocurrent Lerary 2023-66-22 2021 Urr Addition	
Data Dokumente yyyy-MM-dd Hetmm 2022-09-28 2021	
dd/MM.yy HHmm 25.06.23 2021	
Poth dd.MM.yyyy Hitmmss 26.04.2023 20.219	
Privat > Fotos > (Jult) > (Datum (D2F) (Julias) > (Thumal) dd-MMM-yy Hitmm 25-Jun-23 2023	
Nome dd-MMM-yyyy Hitzmm 28-sur-9023 3021	
(Darum (DRF) Foto (Aniass) - (Thema/Nereish) - (Tategraf) dd-MM-yy Hitmm 25-08-23 2021	
dd-MM-yyyy Hitmm 28-08-2023 2021	
MM/dd/yy httmm a 06/25/23.0622 PM	
MM/dd/yyyy hhumm a %//s/2023 as: rw	
yy/MM/dd Hitmm 22/06/28 2021	Cancel Delete Save
yyyy/MM/dd HHzmm 2022/06/28 2023	
Cristia e MMM dd yy Hitmm Jun 25 23 2021	

- as the format is specified, it is displayed in the corresponding tag and if the date and time tag is used as a variable for the file name in the file name
- Path date and time format
  - the date and time day can be used simultaneously to specify it in a directory. It may be desirable to use only a part of it, for example a folder structure that is



created by year (yyyy) or year and month (yyyy-MM) and should be sorted. In the example, the date is used without the time for the directory

- the desired date and time format can be configured individually
- default values are available for selection when the field is activated

+ New Yordur ± uplaat				4 00 🛥 c 🎼
		Dokumenten-Tags		
	Datum (EXIF)		🛱 🧨 2 Jahr	\$ /
	Default value		A Thoms/Barnich	a /)
	Date and time format yyyy-MM-dd HH:mm' Uhr'			* *
Data   Dokumente Dr. Dieter Stainar - Di Mentoring Grinber	Path: Date and time format yyyy-MM-dd			
	yyyy-MM-dd HH:mm	2023-06-25 20:23		
Privat () Fotos () (and () () (and () () () () () () () () () () () () ()	dd.MM.yy HH:mm	25.06.23 20:23		
	dd.MM.yyyy HH:mm:ss	25.06.2023 20:23:21		
(Danum (DDF)) Foto (Aniass) - (Thema/Hernich) - (Fatograf)	dd-MMM-yy HH:mm	25-Jun-23 20:23		
Document type is only a	dd-MMM-yyyy HHmm	25-Jun-2023 20:23		
	dd-MM-yy HH:mm	25-06-23 2023		
	dd-MM-yyyy HHmm	25-06-2023 20:23		County County Com
	MM/dd/yy hh:mm a	06/25/23 08:23 PM		
	MM/dd/yyyy hhamm a	06/25/2023 08:23 PM		
Creats	yy/MM/dd HH:mm	23/06/25 20:23		

- as the format is specified, it is displayed or inserted in the path name
- AI prediction enabled
  - if this option is active, the AI of FilesApp learns based on the information and automatically fills in the values in the tags based on that
  - when transferring EXIF information from photos, this selection is not available
- Al Context Tag
  - this means that based on input by the user, FilesApp maps what was additionally entered for a particular file and suggests the content based on when the combination of the recognized document and the inputs is recognized
  - an example could be that in the case of an incoming invoice from a certain company, an indication is to be made in the document type that is not textually available on the invoice, for example the desired specification of a currency
- Required Tag
  - if this is activated, the content of this tag must be filled before the user can upload the file
  - on the one hand, the color of the tag changes to blue to make this visually clear
  - on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
  - this option is used to specify that the content of the tag can only be changed by a workflow
  - for example, in an incoming invoice process, tags could be filled by a workflow, for example with the indication of who gave the approval or when
  - if this option is activated, the tag content cannot be changed by the users



- all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed and made available for selection during Smart Upload
- Remove Tag this removes the tag from the document type, but does not delete the tag itself

# 4.3.3.7 Time Tags

Time information can be read out in many formats in FilesApp. The configuration of the time tags is done after selecting the format during tag creation in the configuration in the document type.

# 4.3.3.7.1 Time Tag Creation

When creating a tag, select the tag type "Time".

• • •	+	New folder 💧 Upload			L	). OO 4	• C 🛞
()			Manage tags X				+
Files App							lirectory
Q. Global search			Adressat/Behörde/Institution				Edited by 🛛 🗘
✦+ Smart Upload			Data   Dokumente Dr. Dieter Steiner - DS Mentoring GmbH				SA
Connections							SS
Computer			Create tag				SS
DSM DS - SharePoint			Document Library Dr. Dieter Steiner - filesapp.com				
DSM DS - OneDrive			filesapp.u-know.eu				
FA DS - SharePoint							
NEO DSFA - Individual Storage							
ETC DSFA - Individual storage			Description				
EAV. MM - SharePoint							
FAV MM - OneDrive			Type				
FA DS - Individual Storage							
FA DSFA - DRACOON							
+			Cancel Create				
			Dr. Dieter Steiner - filesapp.com				
			Bereich Development   Dokumente Dr. Dieter Stelner - filesapp.com				
			Bereich FAV-P IT   Documents Max Muster - FAV Production				
			Create tag				

Time tags can be automatically filled with <u>EXIF information</u> from the photos by FilesApp AI if desired.

To do this, select "EXIF detection" and select the EXIF field from the list.

It is recommended that you create your own document types for the Photos section.



# 4.3.3.7.2 Time Tag configuration in the Document Type

If a time tag is created and inserted into a document type, the following options are available when AI recognition is activated.

In the example, the time field is labeled "Uhrzeit Freigabe":

0 0 0					
Edit document type					
LIEFERANTEN > Lieferantenname - Lieferantenadresse > AUFTRÄG					······································
Name		II Erstellt von	¥ /	12 Erstellt am	¥ /
FAV-P EINKAUF (Rechnung Nr. (FAV-P) - Eingangsrechnung - Ueteran	Uhrzeit Freigabe				
S Document type is active	Default value				() (+) ()
Al prediction is active O			\$ /	2 Schutzbedarf	¢ /
Scan all pages	HH:mm				
O Scan first 1 pages					
	Path: Time format HH:mm				
U Scultuse i pages	20:28		¢ /	2 Kommentar Fachbereich	<b>\$</b> /
	Al prediction enabled	٥	\$ /	4 Freigabe Fachbereich am	¢ /
		2	\$ /		
		U			
	Required	Ø			+ …
	S Workflow managed	٥	\$ /	2 Gutschriftserwartung Betro	ag (netto) 🌼 🧪
	Over all search				
					+
				2 Kemmontar Controlling	
		Freigabestatus Controlling von	÷ /	2 Kommentar Controlling	↔ / ☆ /
		- Heigese controlling von	~ ~ <i>~</i>	4 Hagaba controlling an	÷ /
					ncel Delete Save

- Default value

a default value for the content tag can be specified here

- Time Format
  - the desired time format can be configured individually
  - default values are available for selection when the field is activated

•••					
Edit document type					
LIEFERANTEN 🔊 (Lieferantenname) - (Lieferantenadresse) 🔊 AUFTRÄ					***
Name		11 Erstellt von	÷ 2	12 Erstellt am	₽ /)
FAV-P EINKAUF (Rechnung Nr. (FAV-P) - Eingangsrechnung - Lisferan	Uhrzeit Freigabe				
Document type is active					
Al prediction is active O			\$ /	2 Schutzbedarf	¢ /
Scan all pages	Time format HH:mm				
O Scan first 1 pages					
	HRmm				
O scan last T pages	HHmmiss	20:30:44	\$ /	🕫 🔰 2 Kommentar Fachberei	ch 🗱 🆊
	hh:mm a	08:30 PM	\$ /	4 Freigabe Fachbereich	am 🗘 🖊
	hh:mm:ss a	08:30:44 PM	¢ /		
	'Es ist' HH' Uhr'				
	worknow managed	v	\$	2 Gutschriftserwartung I	letrag (netto) 🗱 🧨
	Over all search	Ø			
		Close			
		1 Freigabestatus Controlling	\$ /	🗚 🛛 2 Kommentar Controllin	a 🗘 🖌
		3 Freigabe Controlling von	÷ * /	🗚 🕴 4 Freigabe Controlling a	m 🗘 🖊
					Cancel Delete Save



- as the format is specified, it is displayed in the corresponding tag and if the time tag is used as a variable for the file name in the file name
- Path Time Format
  - the Time Tag can be used at the same time to specify it in a directory. It may be desirable to use only a part of it, for example a folder structure that is created by hours (HH) or minutes (mm) and should be sorted
  - the desired time format can be configured individually
  - default values are available for selection when the field is activated

LIEFERANTEN 🔊 (Lieferantenname) - (Lieferantenadresse) 🔊 AUFTRÄG			*		10 10 10 10 10 10 10 10 10 10 10 10 10 1	
		II Erstellt von	ų		12 Erstellt am	¥ /
FAV-P EINKAUF (Rectinung Nr. (FAV-P)) - Eingangsrechnung - Usferar	Ubarait Fasianta					
	Unrzeit Freigabe					
Secondar (Vbals deliva			-			
Al prediction is active O			4		2 schutzbedarr	¥ /
	HH:mm					
	Path: Time format					
	20.28		\$	1	2 Kommentar Fachbereich	\$ /
	HHmm		\$	1	4 Freigabe Fachbereich am	¢ /
	Ulimmaa		\$	1		
	HPL11111.55	20.32.07				
	hhmm a	08:32 PM				
	hh:mm:ss a	08:32:53 PM		_		
	'Es ist' HH' Uhr'		\$		2 Gutschriftserwartung Betrag	g (netto) 🏛 🧪
		Close				
		1 Freigabestatus Controlling	\$	1	2 Kommentar Controlling	¢ /
		3 Freigabe Controlling von	\$	1	4 Freigabe Controlling am	¢ /
						col Delete Save

- as the format is specified, it is displayed or inserted in the path name

- AI prediction enabled
  - if this option is active, the AI of FilesApp learns based on the information and automatically fills in the values in the tags based on that
  - when transferring EXIF information from photos, this selection is not available
- Al Context Tag
  - this means that based on input by the user, FilesApp maps what was additionally entered for a particular file and suggests the content based on when the combination of the recognized document and the inputs is recognized
  - an example could be that in the case of an incoming invoice from a certain company, an indication is to be made in the document type that is not textually available on the invoice, for example the desired specification of a currency
- Required Tag
  - if this is activated, the content of this tag must be filled before the user can upload the file
  - on the one hand, the color of the tag changes to blue to make this visually clear
  - on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
  - this option is used to specify that the content of the tag can only be changed by a workflow



- for example, in an incoming invoice process, tags could be filled by a workflow, for example with the indication of who gave the approval or when
- if this option is activated, the tag content cannot be changed by the users
- all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed and made available for selection during Smart Upload
- Remove Tag this removes the tag from the document type, but does not delete the tag itself

#### 4.3.3.8 Selection Tags

Selection Tags allow you to select specific options for tags from the document type. For example, the designation of a status, an area, etc.

The configuration of the Selection Tags is done after selecting the format during tag creation in the configuration in the document type.

## 4.3.3.8.1 Selection Tag Creation

When creating a tag, select the tag type "Select".

	+	New folder 🟦 Upload	Manage tags X	<b>A</b> 00	1 🔹 C 🍥
FilesApp					
Q. Global search			Adressat/Behörde/Institution		
🔶 Smart Upload			Dr. Dieter Steiner - DS Mentoring GmbH 347.93 KB 24.02.2022 16.202		
Connections			Create tag 30.68 MB 09.06.2023 01.18		
Computer			Document library 2.25 MB 18.10.2022.09.05		
DSM DS - SharePoint			Dr. Dieter Steiner - filesapp.com		
DSM DS - OneDrive					
FA DS - SharePoint			Name		
NEO DSFA - Individual Storage					
ETC DSFA - Individual Storage			Description		
DrDS - Google Drive					
FAV MM - SharePoint			Type		
FAV MM - OneDrive			Select  Presents a list of options from which only one item can be selected		
FA DS - Individual Storage					
FA DSFA - DRACOON			Add option		
+			Cancel		
			Bereich Development   Dokumente Doblet Skiner - Recepcom		
			Bereich FAV-P IT I Documents Warder - EN Brockmitten		
			Create tag		



When a selection tag is created and inserted into a document type, the following options are available. In the example, the selection tag is called "classification", as it is used for data privacy, for example:



New options can be specified and described via "Add option", and they can also be colorcoded in order to be able to draw the user's attention to certain options when making a selection.

As with all tags and document types, rules can be created in workflows on this basis.





The pencil icon can be used to change an option and the burger icon can be used to arrange the options in terms of order.

# 4.3.3.8.2 Selection Tag configuration in the Document Type

If a Selection Tag is created and inserted into a Document Type, the following options are available when AI recognition is activated.

In the example, the selection tag is labeled "Classification":



• • •					
Edit document type					
Finance ≥ Eingangsrechnungen		Leistungsdatum oder -z	zeitraum		+ …
Name		Lieferdatum oder Startdatum Leistungszeitraum	\$ /	2 Enddatum Leistungszeitr	aum 🗘 🖊
Rechnungsdatum (Jeferantenname) - Rechnungs-Nr. Rechnungsn	ummer - FAV-Production - Re				
Document type is active	Klassifikation				+
Al prediction is active Image: Image: Image: Al prediction is active Image: Image: Al prediction is active Image: Image: Al prediction is active Image: I	Default value		¢ /	2 Zahlungsbedingungen	¢ /
Scan all pages			\$ /	4 Rechnung bezahlt ja/nei	n <b>¢</b> /
O Scan first 1 pages	Al prediction enabled		¢ /	6 Rechnung bezahlt Datum	• <b>\$</b> /
O Scan last 1 pages	S Al Context Tag				
	S Required	ø			
	Workflow managed				+ …
	Over all search	O	¢ /	2 Buchungskontobezeichn	ung 🗢 🏟 🇨
			¢ /	4 Kostenstellenbezeichnun	g es 🗘 🖍
		Close			
		Datenschutz und Daten	sicherheit		+ …
		1 Klassifikation	¢ /	2 Schutzklasse	¢ /
					ancel Delete Save

- Default value (Default) here you can specify a default value for the tag content
- AI prediction enabled
   If this option is active, the AI of FilesApp learns based on the information and automatically fills in the values in the tags on that basis
- Al Context Tag
  - this means that based on input by the user, FilesApp maps what was additionally entered for a particular file and suggests the content based on when the combination of the recognized document and the inputs is recognized
  - an example could be that in the case of an incoming invoice from a certain company, an indication is to be made in the document type that is not textually available on the invoice, for example the desired specification of a currency
- Required Tag
  - if this is activated, the content of this tag must be filled before the user can upload the file
  - on the one hand, the color of the tag changes to blue to make this visually clear
  - on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
  - this option is used to specify that the content of the tag can only be changed by a workflow
  - for example, in an incoming invoice process, tags could be filled by a workflow, for example with the indication of who gave the approval or when



- if this option is activated, the tag content cannot be changed by the users
- all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed and made available for selection during Smart Upload
- Remove Tag this removes the tag from the document type, but does not delete the tag itself

# 4.3.3.9 Label Tags

Label Tags contain further information, for example, a label tag could collectively contain different article numbers from a delivery note. Label tags are often used in workflows to convey information to users.

#### 4.3.3.9.1 Label Tag Creation

When creating a tag, select the tag type "Labels".

	+ New folder 🛓 Upload	Manage tags	×	1 00 🐟 C 🚳
				+
FilesApp				Q Search in this directory
Q. Global search		Adressat/Behörde/Institution		$\psi \qquad {\rm Size}  \hat{\gamma}_{\varphi}  {\rm File\ last\ modifi}  \hat{\gamma}_{\varphi}  {\rm Creato}  \hat{\gamma}_{\varphi}  {\rm Edited\ by}  \hat{\gamma}_{\varphi}.$
🔶 Smart Upload		Dr. Diater Stainer - DS Mentoring CmbH		
Connections		Create tag		
Computer		Document Library		
DSM DS - SharePoint		filesapp.u-know.eu		
DSM DS - OneDrive				
FA DS - SharePoint				
NEO DSFA - Individual Storage				
ETC DSFA - Individual Storage		Description		
DrDS - Google Drive		Туре		
FAV MM – SharePoint		Labels		
FAV MM - OneDrive				
FA DS - Individual Storage				
FA DSFA - DRACOON		Al image categorization	O	
+				
			Cancel Create	
		Bereich Development   Dokumente Dr. Dieter Steiner - filesapp.com		
		Bereich FAV-PIT   Documents Max Muster - FAV Production		
		Create tag		

Label tags can be automatically filled by the AI for photos if desired.

To do this, select "AI Photo Categorization".

As a result, the AI writes further information into this label tag that is recognized in a photo, for example dog, cat, mouse, house, people, etc.



It is recommended that you create your own document types for the Photos section.

# 4.3.3.9.2 Label Tag configuration in the Document Type

If a Label Tag is created and inserted into a Document Type, the following options are available when AI recognition is activated.

In the example, the Label Tag is labelled "Auftragsnummer/n":

• • •					
Edit document type					
Document type name		Dokumenten-Tags			
FAV-P Finance - Eingangsrechnung (Workflow)		1 Status	± /	2 Fachbereich	± 4
Description Eingangsrechnungen mit Workflow			Ť		
Connection general document type	Auftragsnummer/n				
Document library	Defaulturelur		¢ /	2 Bestellnummer (FAV-P)	¢ /
FAV-P FINANCE   Documents	Default value		¢ /	4 Rechnungsdatum	¢ /
	Al prediction enabled	0	¢ /	6 Lieferantenname	¢ /
Path		•	\$ /	8 Rechnungsbetrag brutto	¢ /
LIEFERANTEN 🗲 Lieferantenname – Lieferantenadresse 🗲 AUFTRÄC		U	\$ /	10 Leistungszeitraum bis	¢ /
	Required	Ο	¢ /	12 Erstellt am	<b>\$</b> /
Name	Workflow managed		¢ /		
FAV-P EINKAUF (Rechnung Nr. (FAV-P) - Eingangsrechnung - Lieferan	Over all search				
Document type is active					+ …
			\$ /	2 Schutzbedarf	¢ /
		Close			
Scan all pages					
O Scan first 1 pages		Freigabe Fachbereich			+
O Scan last 1 pages		1 Freiggbestatus Fachbereich	÷. /	2 Kommentar Fachbereich	* *
		3 Freiggbe Fachbereich von	* *	4 Freigghe Fachbereich am	* *
		a meiguber demoleach von	~ ~ /	4 Heiguber denbereich am	~ <i>~ ~</i>
					cel Delete Save

- Default value (Default) here you can specify a default value for the tag content
- Al prediction enabled If this option is active, the Al of FilesApp learns based on the information and automatically fills in the values in the tags on that basis
- Al Context Tag
  - this means that based on input by the user, FilesApp maps what was additionally entered for a particular file and suggests the content based on when the combination of the recognized document and the inputs is recognized
  - an example could be that in the case of an incoming invoice from a certain company, an indication is to be made in the document type that is not textually available on the invoice, for example the desired specification of a currency
- Required Tag
  - if this is activated, the content of this tag must be filled before the user can upload the file



- on the one hand, the color of the tag changes to blue to make this visually clear
- on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
  - this option is used to specify that the content of the tag can only be changed by a workflow
  - for example, in an incoming invoice process, tags could be filled by a workflow, for example with the indication of who gave the approval or when
  - if this option is activated, the tag content cannot be changed by the users
  - all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types
  - if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed and made available for selection during Smart Upload
- Remove Tag this removes the tag from the document type, but does not delete the tag itself



# 5 Workflows and Automations with Microsoft Power Automate

## 5.1 FilesApp Workflows and Automations with Microsoft Power Automate

With FilesApp, it is possible to use Microsoft Power Automate to create workflows. The triggers and actions for Power Automate have been integrated down to the document type and tag level, which makes the complete FilesApp functionalities controllable via workflows.

FilesApp provides numerous templates for Microsoft Power Automate workflows that can be adopted by the user, see description below.

		- Hote Erige	guaden		-
		<ul> <li>Document Type</li> </ul>	P-P EINKAUF Eingangsrechnung		
		{x} Initialize var	riable 💿 …		
			Ļ		
Scope FilesApp Tags s	setzen		•		
				_	
		Condition			
		Sachber	X is equal to V Geschäftsleitung		
		+ Add ~			
1 11.000		×		]	
If yes		If no			
-					
* Document ID	Document ID ×  P-P EINKAUF Eingangsrechnung	<u> </u>	Fachber X is equal to	✓ Controlling	
* Document ID [ * Document Type [ * Rechnung Nr. (P-P [ intern)	Document ID × P-P ENKAUF Eingangsrechnung     Rechnung Re: ( ×	<ul> <li>✓</li> </ul>	Fachber x is equal to	✓ Controlling	
* Document ID [ * Document Type [ * Rechnung Nr. (P-P [ intern) [ (Lieferant) [	Doument ID X  P P DNA/// Engargenchung     Rohung Nc ( X      Rohung Nc ( X		Factor. x     sequel to     + Add >	✓ Controlling	
Document ID     Document Type     Rechnung Nr. (P-P     Intern)     Rechnung Nr.     (Lieferant)     Rechnungsdatum	Doament ID x  PF EXXXVF Engingerechnung     Rechnung Nr. ( x      Rechnung Nr. ( x      Rechnung Nr. ( x	V If yes	Factor. x     sequel to     + Add >	Controlling	
Document ID     Document Type     Rachnung Nr. (P-P intern)     Rachnung Nr. (Lieferant)     Rachnungsdatum     Uaferantenadresse	Doament ID x  PP EXXVLF Engagementung     Redrung fits (_ X      Redrung fits (_ X      Redrung fits (_ X      Leferanteed,_ X	V If yes	Factor. x     sequel to     + Add >	Controlling	
Document ID     Document Type     Document Type     Rechnung Nr. (Iv-P     (Lieferant)     Rechnungskatum     Lieferantenadresse     Lieferantename	Doament ID x  P F EXXAUF Engingenediumg  Rednung fb (_ x  Rednung fb (_ x  Rednung fb (_ x  Liderantenadi, x  Liderantenadi, x  Liderantenadi, x	V If yes	Tacher. x   equal to + Add >	Controlling If no Status Treigabe fachtich' setzen	© …
Document ID  Document Type  Rechrung Nr. (P-P  Rechrung Nr. (Lieferanten  Rechrung Nr. Lieferantenadresse  Uderantenadresse  Uderantenadresse  Dateiname	Doament ID x      P PENKUF Engagerichnung      Rohnung Nc. (. x      Rohnung Nc. (. x      Rohnung Nc. (. x      Lieferstenster, x      Lieferstenster, x      Datelsame x	V If yes	pate Controlling efforderich' setzen	Cothealing If no Status Treigabe fachlich' setzen	o
Document ID     Coursert ID     Coursert Type     Rechnung Kr. (I-P     Indenn)     Rechnung Kr. (Luferant)     Rechnung Kr.     Luferantenadresse     Luferantenadresse     Luferantename     Dateiname     Klassifizierung	Doament D x  PF EXXLVF Engingenchrung  Rohrung Nr. ( . x  Rohrung Nr. ( . x  Rohrung Nr. ( . x  Lieferanteesdr. x  Lieferanteesdr. x  Datesame x  Datesame x	V If yes	able Controlling efforderich' setzen	Controlling  If no  Status Treigabe fachild' setzen	@ ···
Document ID     Coursert ID     Coursert Type     Rechnung Kr. (L-P     Indenn)     Rechnung Kr. (Luferant)     Rechnung Kr.     Luferantenadresse     Luferantenadresse     Satutzbedarf	Doament ID x  PF EDXXUF Engagerechnung  Rechnung Itz. (_ x  Rechnung Itz. (_ x  Rechnung Itz. (_ x  Lieferstended,_ x  Lieferstended,_ x  Dateiume x	V If yes Status Tree * Document Type * Rechurg No. (P-P	ploe Controlling enforderich' setzen	Contrasting Contrasting If no Status Treigabe fachlich' setzen Treigabe fachlich' setzen Treigabe fachlich' setzen	) en action
Document ID     Document ID     Document Type     Rechnung Nr. (h-P     Internity)     Rechnung Nr. (h-P     Internity)     Rechnung Nr. (h-P     Internity)     Rechnung Nr. (h-P     Internity)     Studiesharte     Dubeiname     Dubeiname     Gutschriftserwartung     Gutschriftserwartung	Doument ID x  PF EXXAUF Engingenehrung     Redrung fit: (_ x      Redrung fit: (_ x      Redrung fit: (_ x      Lieferstenderx      Lieferstenderx      Dateitame x	If yes      If yes      Status Tree      Document ID      Concentration      Repring to:      Repring t	abe Controlling enforced inf sector	Contracting Contracting If Ino Status Treigabe fachich' setzen	) ···
Document ID     Counterst ID     Counterst ID     Counterst Type     Rechaug Rr. (P-P     Inden)     Rechaug Rr. (Inference)     Rechaugedatum     Cuterantenadresse     Liderantenadresse     Cuterantenadresse     Cu	Doament D X  P FERKUF Engingerchrung      Rohrung hz ( X      Rohrung hz ( X      Identrimed X      Uderstmend X      Uderstmend X      Uderstmend X		pabe Cortrolling erforderich' setzen  pabe Cortrolling erforderich' setzen  pabe Cortrolling erforderich' setzen  peter Cortrolling erf	Cothealing  If no  Status Treigabe fachlich setzen  Categorie Automotive Status  Automotive Status  Categorie Status	an adon
Document ID     Document ID     Document Type     Rechnung Nr. (P-P     Rechnung Nr.     (Leferantenadresse     Rechnung Nr.     Leferantenadresse     Ueterantenadresse     Schutzbeider     Godschriftsmentung     Narmenig     Narmenig     Narmenig     Status	Doament D X  PF Ettikkuf Engingenchrung  Richung Nr. ( . X  Uidrantenadr. X  Uidrantenadr. X  Datistam X  Progabic Gechähtlührung erfordnich	V If yes Status Tree Document ID Document Type Benchmay Bit: (P-J Benchmay Bit: (P-J Benchmay Bit: (P-J) Benchmay Bit: (P-J) Be	atte Controlling erforderich' setzen	Contrasting  If no  Status Treigabe fachild' setzen  T Add	(i) ····
Document ID     Occument ID     Occument Type     Techning Ne (Lefterart)     Schning Ne (Lefterart)     Schning Ne (Lefterart)     Ucheranton Ne     Ucheranton Ne     Ucheranton Ne     Schutzbedarf     Gdschriftbarverstrag     Nammer     Warnenigengenummer     Status     Fedebersch	Doament ID x  PF EDXXUF Engagerschrung  Richung Nr. ( x  Richung Nr. ( x  Richung Nr. ( x  Lieferstensdr x  Lieferstensdr x  Dateilune x  Pregube Geschältsöhnung erfurderlich		abb Controlling efforderich's setzen	Contrasting  If no  Status Treigabe facilitie' setten  T has	an action
Document ID     Cocument ID     Cocument ID     Cocument Type     Rechnung Nr: (h-P     (lefterart)     Rechnung datum     Uderantenadresse     Uderantenadresse     Cocument     Cocu	Doument ID x  PF EXXXUF Engagenebrung  Rechung Ik: (_ x  Rechung Ik: (_ x  Rechung Ik: (_ x  Extensed x  Extensed x  Extenses x  Pregabe Geschaftsführung erforderlich  Pregabe Geschaftsführung erforderlich  Pregabe Geschaftsführung erforderlich	If yes      If yes      Status Tree      Couramet Type      Rennung Nc. (P-P      Isterning Nc.      Laferardrowske      Luferardrowske      Luferardrowske	abb Controlling offorderich's setzen  b Controlling offorderich's setzen  b Controlling offorderich's setzen  b Document ID X  PP EIX44UE Engangenehung  b Rechnung Net.(X  b Rechnung Net.(X  b LaferantmackX  b Lafer	Contrasting  If no  Status Treegabe fachlich' setzen  Treegabe fachlich' setzen  Treegabe fachlich' setzen  Treegabe fachlich' setzen	on action
Document ID     Document Type     Sechung Nr. (h-P     Indexing Nr. (h-P     Indexi	Doament D X  P EDKUUF Engingerichnung      Rohnung hit ( X      Rohnung hit ( X      Rohnung hit ( X      Uderstmensch X      Uderstmensch X      Uderstmensch X      Dateiname X  Pregube Geschältsföhrung erfuderlich  Bestellnummer X		abb Cortrolling erforderich' setzen  abb Cortrolling erforderich' setzen  bocoment ID ×  PP EIM6UF Engingmendnung  bichonung Nr.(-, ×  bichertennegk, ×  bichennegk, ×  bi	Cotheoling  If no  Status Treigabe fachlich' setzen  Cotheoling  Add  Cotheoling  Cotheol	an action

The execution of workflows and automations in FilesApp is independent of the storage system, for example, files can be stored on Google Drive via FilesApp, which are controlled by a Microsoft Power Automate workflow.

If the user would like support in configuring and creating Microsoft Power Automate workflows, this can be requested via FilesApp, which in turn refers one of its partners. Inquiries can be directed to <a href="mailto:support@filesapp.com">support@filesapp.com</a>.

FilesApp triggers and actions can be called directly in Microsoft Power Automate. The Microsoft-certified connector can use "FilesApp", which is publicly available.



#### 5.2 Requirements

#### 5.2.1 Microsoft Power Automate License

The user who wants to create Microsoft Power Automate workflows needs at least one Power Automate Pro user plan and permission to do so in their Microsoft 365 account.

#### 5.2.2 FilesApp License

In terms of the storage system, a FilesApp Business Professional license is required for the connection for users using the file management workflow.

For example, in office management, a workflow can be triggered, which is executed when a user in the accounting department sets a certain tag for the file for it in FilesApp, and this file is then moved to another directory. The users who trigger this workflow will need a FilesApp Business Professional license. In this case, the users of accounting. For other users, such as Controlling, who have access to these files but do not edit them, a FilesApp Business Basic license is sufficient.

#### 5.3 FilesApp Power Automate Trigger and Flow Actions

#### 5.3.1 FilesApp Power Automate Trigger

#### 5.3.1.1 Trigger: When a FileTag is changed

This trigger must be given a document type and an associated tag as a transfer parameter. The flow is triggered as soon as the value of the corresponding tag changes in the file.

When a FileTa	g is changed	····
* Document Type	Photos	~
* File Tag	Bereich	$\checkmark$

# 5.3.1.2 Trigger: When a new document is uploaded via FilesApp Smart Upload

This trigger must be given a document type as a transfer parameter.

The flow triggers when a file is uploaded via FilesApp using the Smart Upload.

Afterwards, all tag values that have been assigned to the document can be freely used for further flow actions.



When a new c	locument is uploaded via FilesApp Smart Upload	····
* Document Type	FAV-P Finance - Eingangsrechnung	~

# 5.3.2 FilesApp Power Automate Flow Actions

5.3.2.1 Flow Action: Update FileTags of a FilesApp document

This flow action can be used to assign or update document type and tag values to a file. After selecting the document type, the associated tags are dynamically loaded as input fields for the flow action.

Here, for example, are the tags of a document type for tagging photos.

Updates File	Tags of a FilesApp document	···· (?)
* Document ID	1234	
* Document Type	Photos	$\checkmark$
* Date		
	'Date' is required.	
* Tags		
	'Tags' is required.	
* Bereich	Fachbereich, Abteilung,	
	'Bereich' is required.	
* Projekt		
	'Projekt' is required.	
*Name Ersteller		
	'Name Ersteller' is required.	
* Dateiname	documentName	
	'Dateiname' is required.	
Drive ID	driveId	

# 5.3.2.2 Flow Action: Search for FilesApp Documents

If you want to find documents by tags, you can do this with this action.

The choice of the document type for the search is mandatory. Subsequently, one or more filter operations can be added.

Multiple filter operations can be joined with "AND" as an ampand link or with "OR" as an OR link. Subsequently, all found files are output as an array, which in turn can be further processed in the flow.

The following operators are available for individual tag filter operations:

- Equals: Search for files whose tag content matches the passed value for the passed tag



- Unequals: Search for files whose tag content does not match the value passed for the passed tag
- Contains: Search for files whose tag contents contain the passed value for the passed tag
- Less Than: Search for files whose tag contents are less than the passed value for the passed tag
- Greater Than: Search for files whose tag contents are greater than the value passed for the passed tag

Search for File	sApp documents	?	
* Document Type	Photos	,	<b>~</b>
fields operator - 1		••••	
fields field - 1			
Bereich			
fields compareOperator			
Equals			
fields value - 1			
Entwicklung			
fields operator - 2			
AND			
fields field - 2			
Projekt			
fields compareOperator			
Equals			
fields value - 2			
iPhone			
+ Add new iten	n		
L			



# 6 Technologie

# 6.1 FilesApp Infrastructure

The FilesApp back-end system is an up-to-date network of microservices designed to provide a reliable, robust, and scalable solution. Each of these services has been developed on the basis of .NET 6 and offers specific features for the overall system.

The core service is the heart of the system, controlling the central business logic and processes. It enables efficient interaction with other microservices and provides the basis for stable application.

The Repository Service provides an abstract layer on top of the MySQL database that enables efficient data manipulation and retrieval. It ensures a clear separation between the data access layer and the business logic.

The search service provides comprehensive search functionalities that allow users to navigate through the application quickly and efficiently. He is responsible for handling search queries and returning relevant results.

The FilesApp AI Service, based on ML.NET, provides state-of-the-art machine learning capabilities. It is able to train AI models based on tagged documents and thus recognize document types and tags in files.

To ensure the seamless deployment, scalability, and redundancy of these microservices, we will use Docker and Kubernetes. Docker provides lightweight containerization that ensures a consistent environment for running the applications, while Kubernetes allows these containers to be orchestrated across multiple hosts.

Finally, NGINX serves as a FilesApp reverse proxy server that efficiently manages traffic between our microservices and users. It provides improved performance, load balancing and additional security for the FilesApp systems.

This architecture ensures high performance, scalability, and reliability of the FilesApp backend.



#### Core Service .NET 6 Service **Repository Service** .NET 6 Service Nginx Proxy Service Search Service HTTPS WSS .NET 6 Service -JSON Web Token AI Service .NET 6 Service **MySQL** FilesApp Client HTTPS FilesApp DMS (On-Prem) -Client Certificate Core Service .NET 6 Service HTTPS -JSON Web Token Nginx HTTPS Proxy Service Admin Web Interface Service HTTPS Webbrowser -JSON Web Token Administration von Bibliliotheken, Usern und Berchtigungen des DMS (On-Prem) Systems

#### 6.2 FilesApp AI

PosgresSQL Encryption Database DMS Database Permission Database

FilesApp Cloud Service

The FilesApp Artificial Intelligence (AI) service revolutionizes the way files and documents can be managed by providing a state-of-the-art automatic tagging feature.

This service leverages advanced machine learning techniques based on ML.NET technology to enable continuous improvement and automation of the document management process.

As soon as a user uploads a document and determines certain tags and document type, the Al begins the learning process. It analyzes the contents of the document and learns how to determine document types and automatically populate tags in future scenarios.

This not only simplifies document management, but also improves the searchability and retrieval of files.

The FilesApp AI uses ML.NET technology, an open-source, cross-platform machine learning framework from Microsoft. It enables the development of customized machine learning models based on FilesApp's specific requirements and data.



The ML.NET technology is used exclusively in FilesApp's own environments, no data is transferred externally.

By using ML.NET, the FilesApp AI is able to efficiently recognize and learn patterns and relationships in the data, resulting in increasingly accurate prediction of automatic tagging.

To support the learning process and to optimize the performance of the FilesApp AI, the contents of the documents are cached on the back-end system during training. This allows the AI to quickly access the data it needs and learn efficiently. Great importance is attached to data protection: once the training is completed, the cached content is securely deleted to ensure the confidentiality and security of the data.

The FilesApp AI service is designed to support PDFs, Word, Excel, and PowerPoint files. This allows for broad coverage and flexibility in terms of document management and editing.

Other file types can also be implemented on request to <a href="mailto:support@filesapp.com">support@filesapp.com</a>.

It is important to note that processing time may vary. PDF documents that already contain textual data can be processed faster because the text can be extracted and analyzed directly. This allows the FilesApp AI to immediately start the learning process and efficiently populate the associated tags.

Scanned documents, including scanned PDFs, first require text recognition through an Optical Character Recognition (OCR) process. This process converts the textual data contained in the scanned image into machine-readable text, which can then be analyzed and learned by the AI. While the OCR process is highly accurate, it can require additional processing time, which can affect the total time it takes for the AI to learn the document type.

In summary, FilesApp AI is a powerful tool for automating document management and a future-oriented solution that is continuously improved and adapted.



# 7 API-Zugriff

## 7.1 FilesApp API Access

FilesApp enables the connection, integration and automation with corresponding other applications, such as ERP systems, workflow management, and much more, via its GraphQL and REST API. For example, Microsoft SharePoint can be used as a storage system for a DMS through the FilesApp if the system used offers a modern API, at no additional cost.

#### 7.2 Requirements for using the FilesApp API

In order to use the FilesApp API efficiently, the following requirements must be met:

- access to API documentation: Customers can request access to the detailed FilesApp API specification, which includes information on how to use both the FilesApp GraphQL and FilesApp REST APIs.
- understanding the API language: A solid understanding of GraphQL or REST is necessary to effectively use the features and capabilities of our API.
- network access: A stable internet connection is required to enable reliable communication with our API.

# 7.2.1 Requirements for the system to be connected

In order to integrate the FilesApp API set into the customer's system, the following requirements must be met:

- backend support: the backend system must be able to handle both GraphQL and REST requests. This can be achieved by using appropriate libraries and frameworks in the preferred programming language.
- error handling: the system should be able to respond to possible errors returned by the FilesApp API. This requires an appropriate error handling strategy.
- client libraries: Leveraging client libraries such as Apollo for GraphQL and corresponding libraries for REST can make the process of API interaction much easier.
- system performance: the system must be able to meet the possible performance requirements that may arise from communicating with the FilesApp API.

# 7.2.2 FilesApp License

In terms of the storage system, a FilesApp Business Professional license is required for the connection for users using the file management workflow.

For example, in office management, a workflow can be triggered, which is executed when a user in the accounting department sets a certain tag for the file for it in FilesApp, and this file is then moved to another directory. The users who trigger this workflow will need a FilesApp Business Professional license. In this case, the users of accounting. For other users, such as Controlling, who have access to these files but do not edit them, a FilesApp Business Basic license is sufficient.



# 7.2.3 API Calls

API usage is limited to 100,000 calls per month. A higher number of API calls is possible on request, the price for which can be requested by e-mail via <a href="mailto:support@filesapp.com">support@filesapp.com</a>.



# 8 Service and Support

#### 8.1 Service Level Agreements

#### 8.1.1 Quality Principle

The FilesApp services are developed and operated with the highest possible care, reliability and availability in mind, and are based on the current state of the art.

#### 8.1.2 Availability

In the case of FilesApp, the average annual availability of FilesApp software during the standard business hours is 99.99%; Maintenance work counts as availability times.

#### 8.1.3 Monitoring

With regard to FilesApp, all central components are monitored and proactively suppressed by the operators of the data centers.

#### 8.1.4 Interference elimination

The central components of FilesApp are operated redundantly. As a rule, the central components are suppressed within four hours, but no later than the next working day.

#### 8.1.5 Maintenance

For maintenance and optimization purposes, FilesApp and its data center operators provide maintenance windows. These are usually between 10:00 p.m. and 6:00 a.m. in the respective time zone in which FilesApp is operated and on weekends.

In order to quickly troubleshoot systems in the event of acute problems in the network, FilesApp or its data center operators can also provide repair windows outside of the usual maintenance windows. If work has to be carried out that may affect the services booked by the users, they are usually informed one calendar day in advance.

During the maintenance period, the technical equipment can be taken out of service to the necessary extent.

FilesApp and its data center operators carry out necessary updates and the installation of patches on the systems provided. To this end, FilesApp and its data center operators are entitled - if necessary - to take the systems offline. In the case of critical updates or patches, there is no advance information about maintenance work for the customer.

The employees of FilesApp and their data center operators are instructed in the necessary duty of care when working on the systems.



## 8.1.6 Bugs and error messages

Bugs and errors in the FilesApp application can be reported seven days a week around the clock via e-mail ticket via <a href="mailto:support@filesapp.com">support@filesapp.com</a>.

## 8.2 Application Support

FilesApp GmbH provides FAQs and tutorials for all users related to FilesApp via its website and the channels indicated on the website.

When a company books FilesApp Business Connections or apps, the company receives user support.

Support requests can be sent to the <u>support@filesapp.com</u> email address <u>mailto:support@filesapp.com</u>.

There is a possibility that support will be provided by FilesApp partners.

#### 8.3 Implementation Services

Users of FilesApp can request service support from partners of FilesApp, for example for the introduction of FilesApp or the creation of document types, digitization or automation projects, integrations and connections to and to other systems, which is done at the partner's own offers and expense.

Inquiries about the placement of partners can be sent by e-mail to support@filesapp.com.