



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.

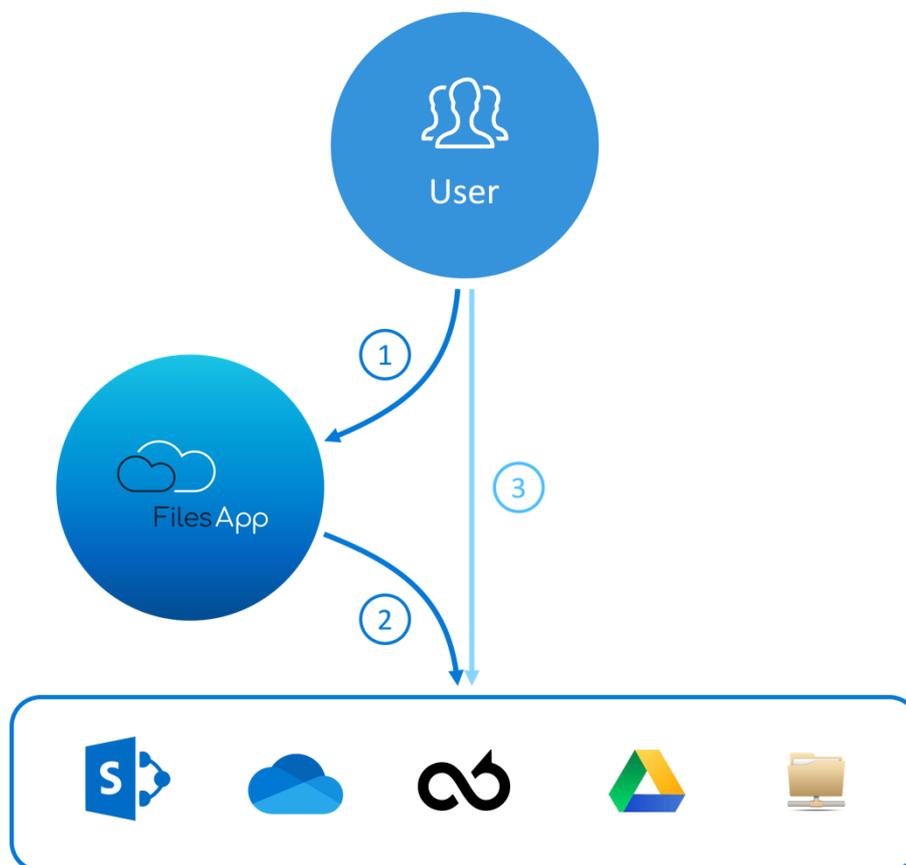
The completely automated storage of files, for example by means of workflows or systems connected via API, is also possible.

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 <https://filesapp.com/pricing/>.

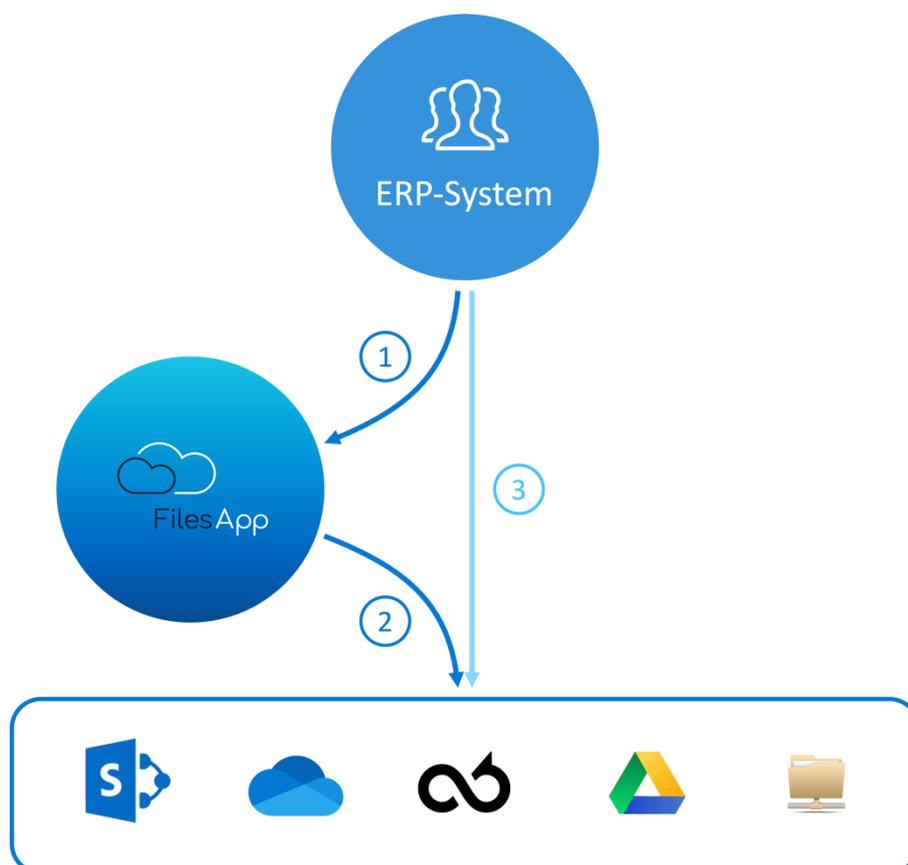
1.1.1 Upload process by the users

- 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:

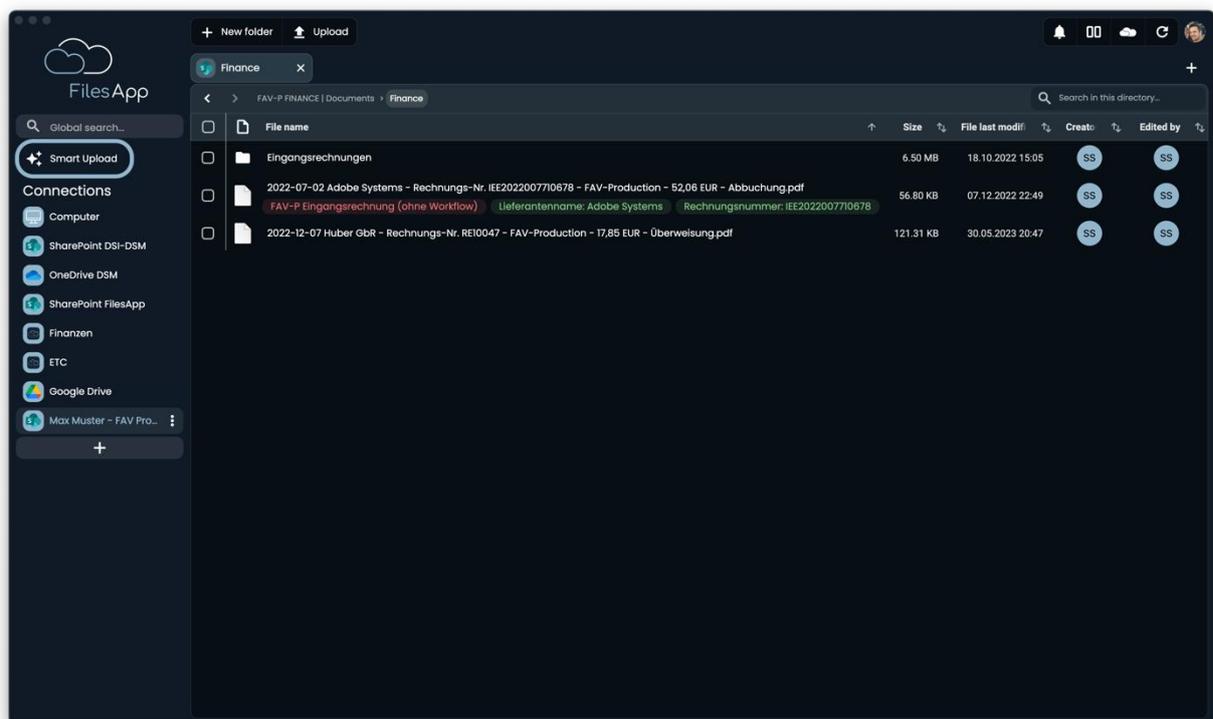
- API usage options for connecting other systems (e.g. ERP systems, CRM, etc.)
- Use your own workflows with Microsoft Power Automate

1.2.2 Smart Upload

1.2.2.1 Start a Smart Upload

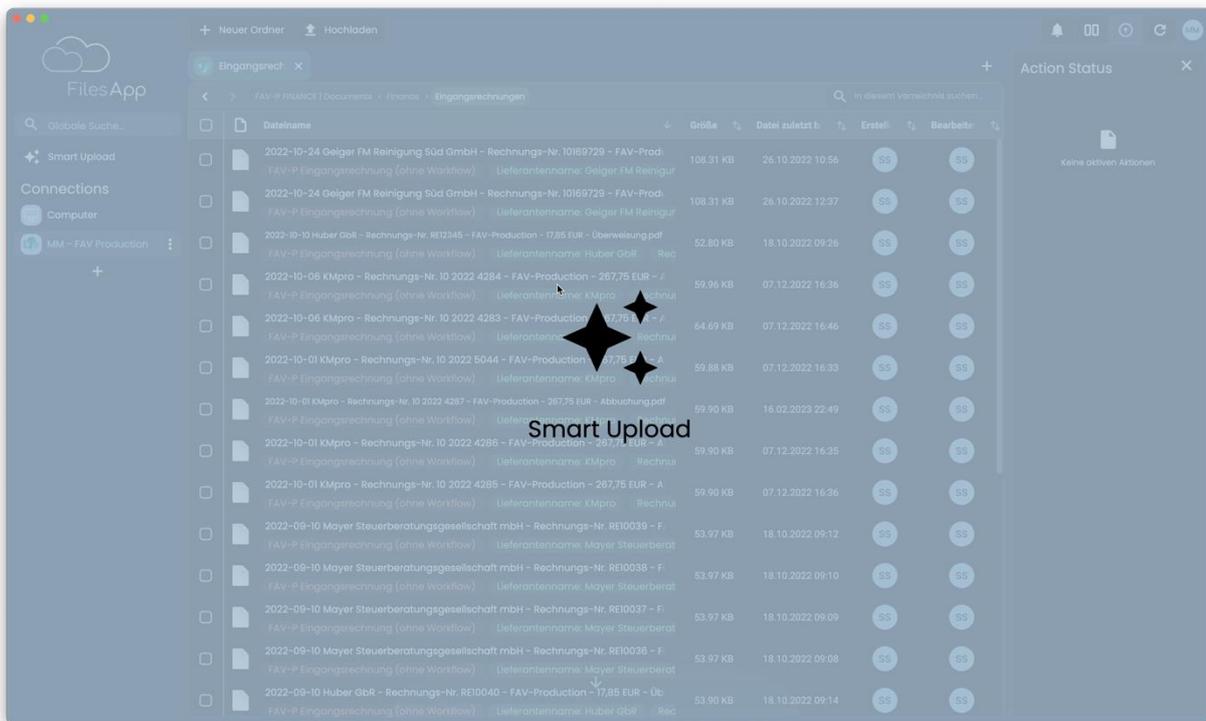
If a file is transferred to the FilesApp via Smart Upload, it starts with an extended range of functions. Document types can be selected. If AI (artificial intelligence) is active or available, document types are suggested and trained tag content is automatically filled. The file can then be uploaded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

Execution of the Smart Upload:

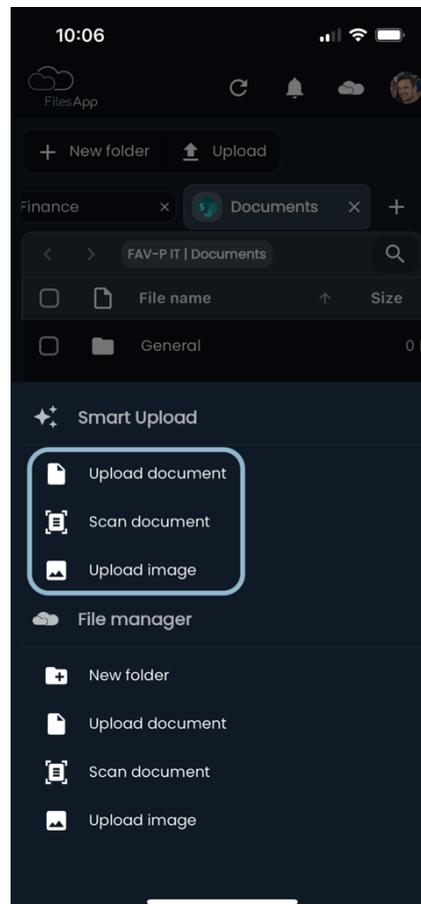
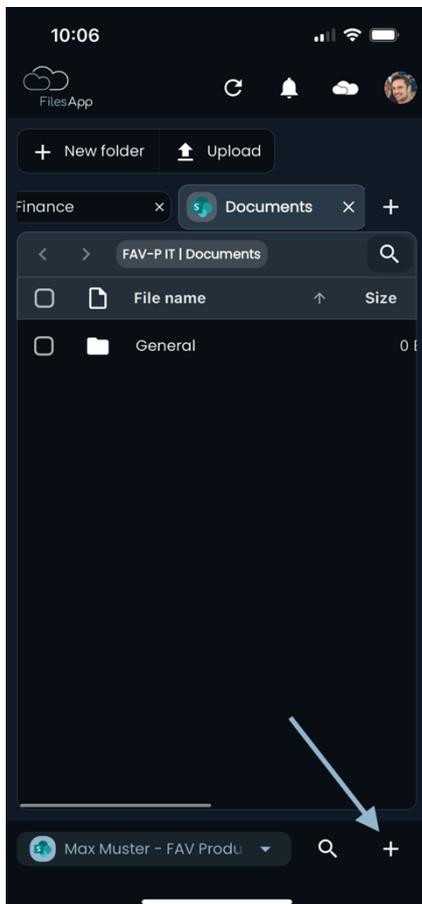


By selecting "Smart Upload" in the upper left area in the desktop app, in the web client or on the tablet.

By drag & drop in the desktop app.



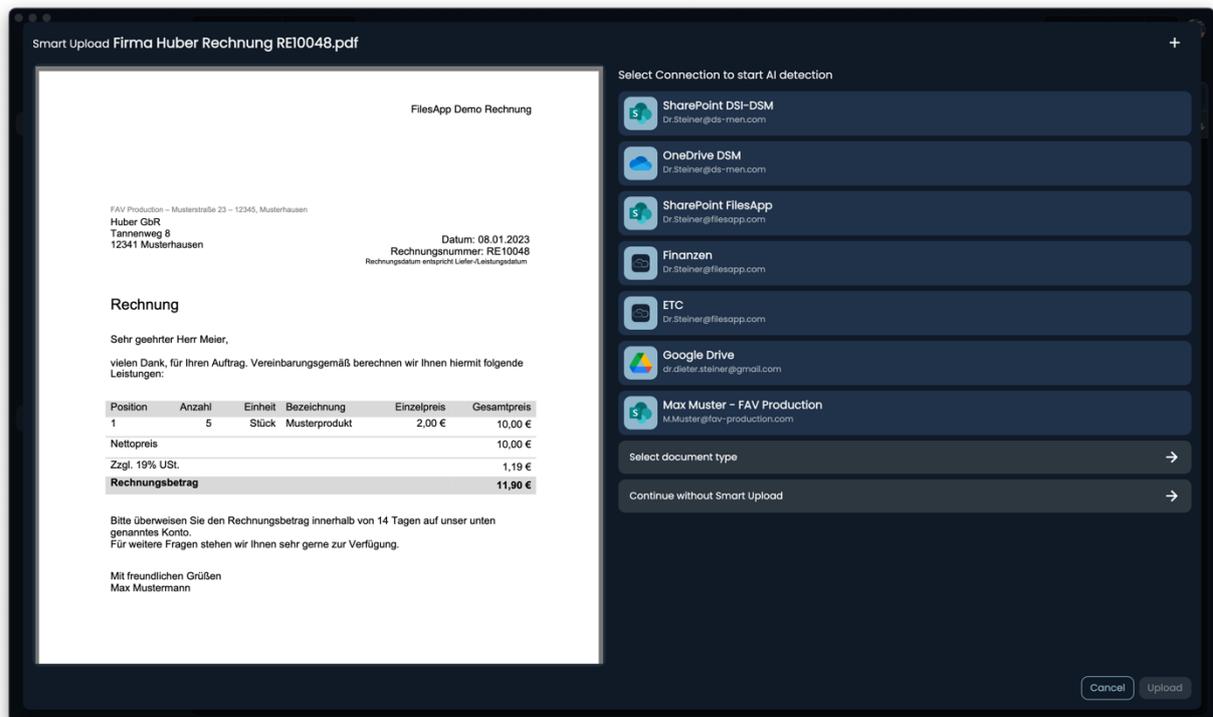
Or by selecting it in the smartphone app.



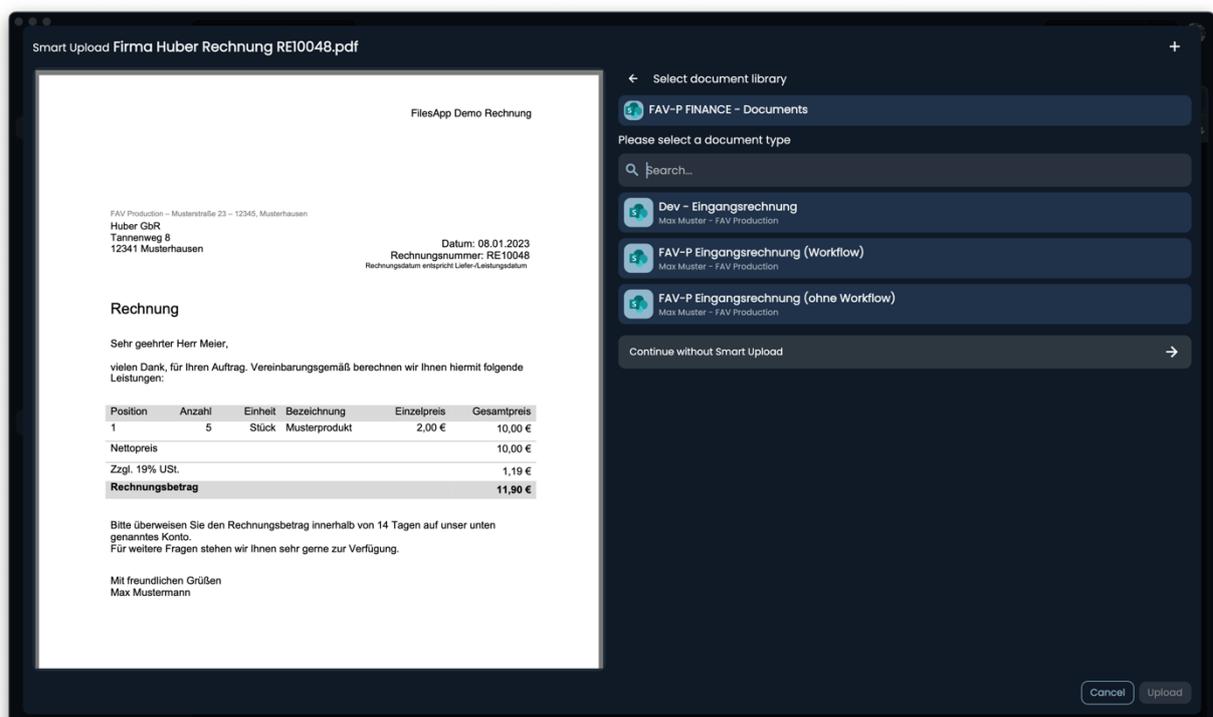
A document scan function is also available in the smartphone app.

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.

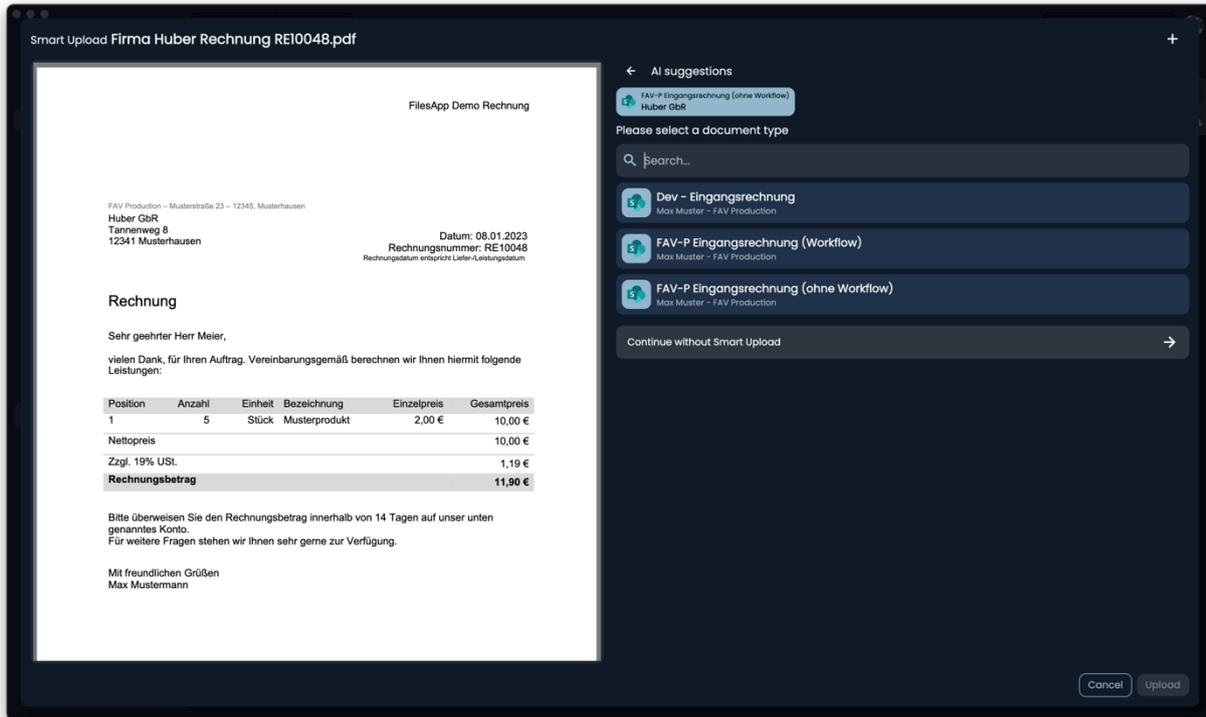


After selecting the storage system, FilesApp suggests the document library.

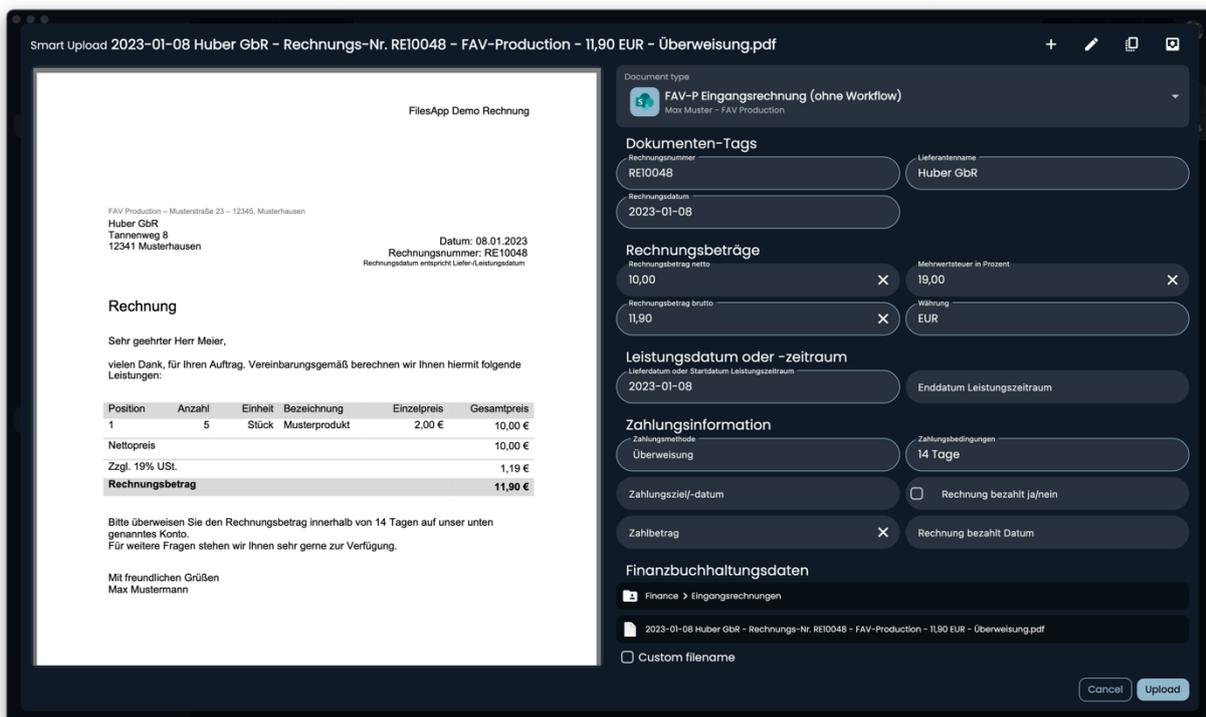


It is possible to manually select a document type or continue the process without Smart Upload.

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



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.

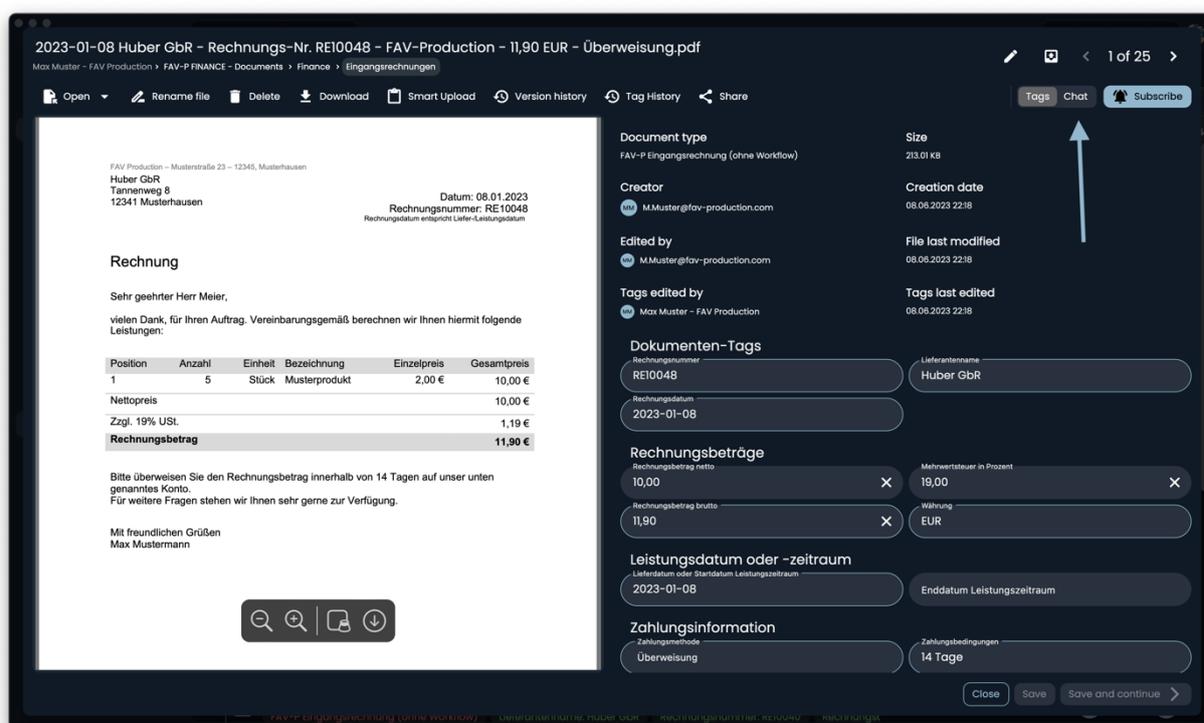


The user only has to carry out a plausibility check of the tag contents and correct it if necessary. The AI learns with every process and the recognition rate increases with each Smart Upload of the document type.

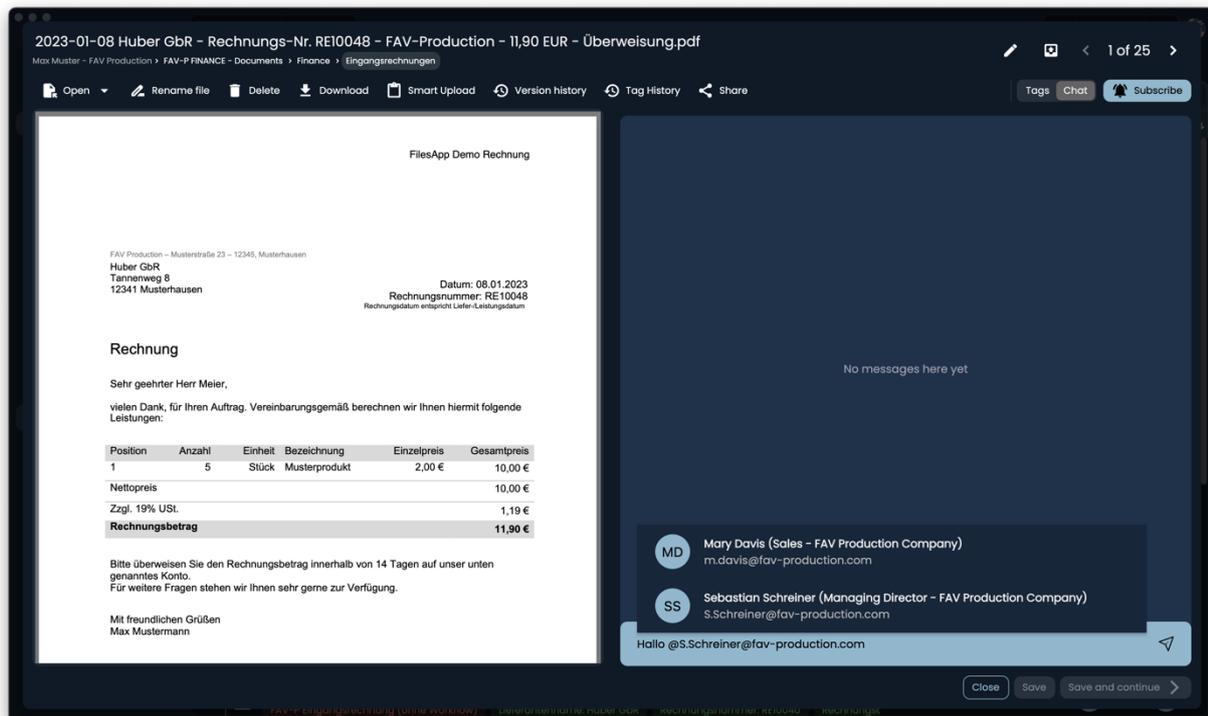
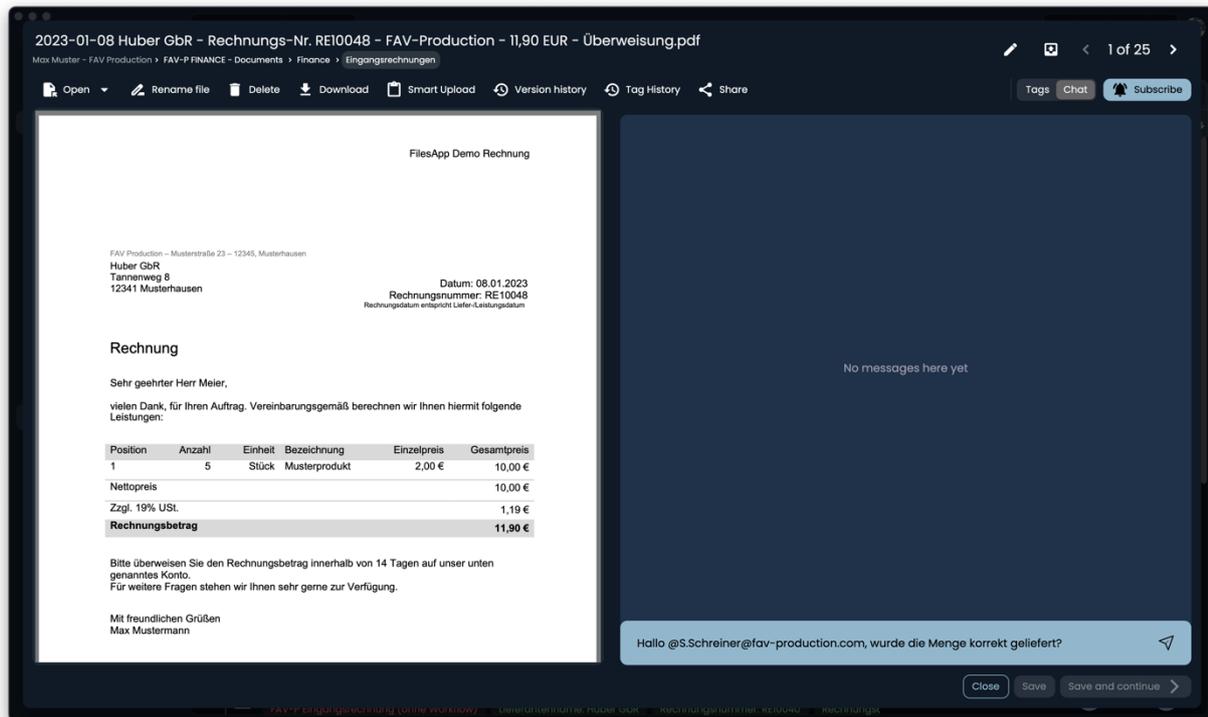
By clicking on "Upload", the file is uploaded to the storage system defined in the document type.

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.



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.

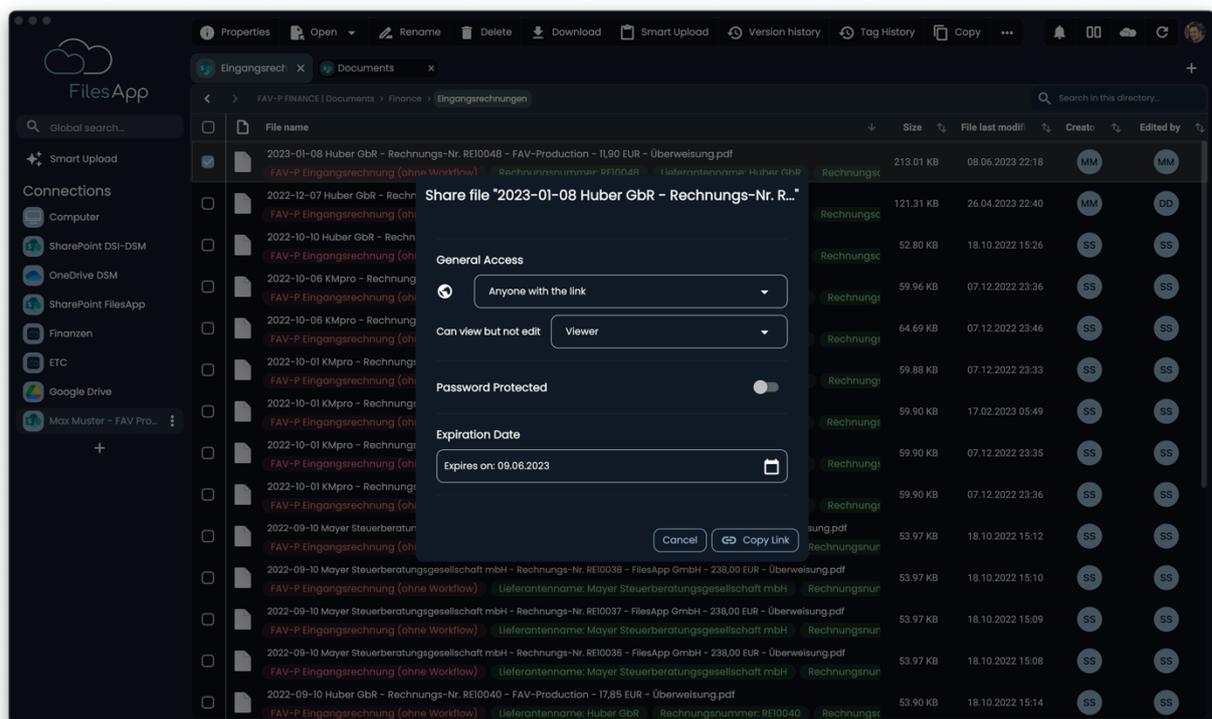
The following actions around the FilesApp are documented in the history:

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

1.2.5 Sharing files and directories

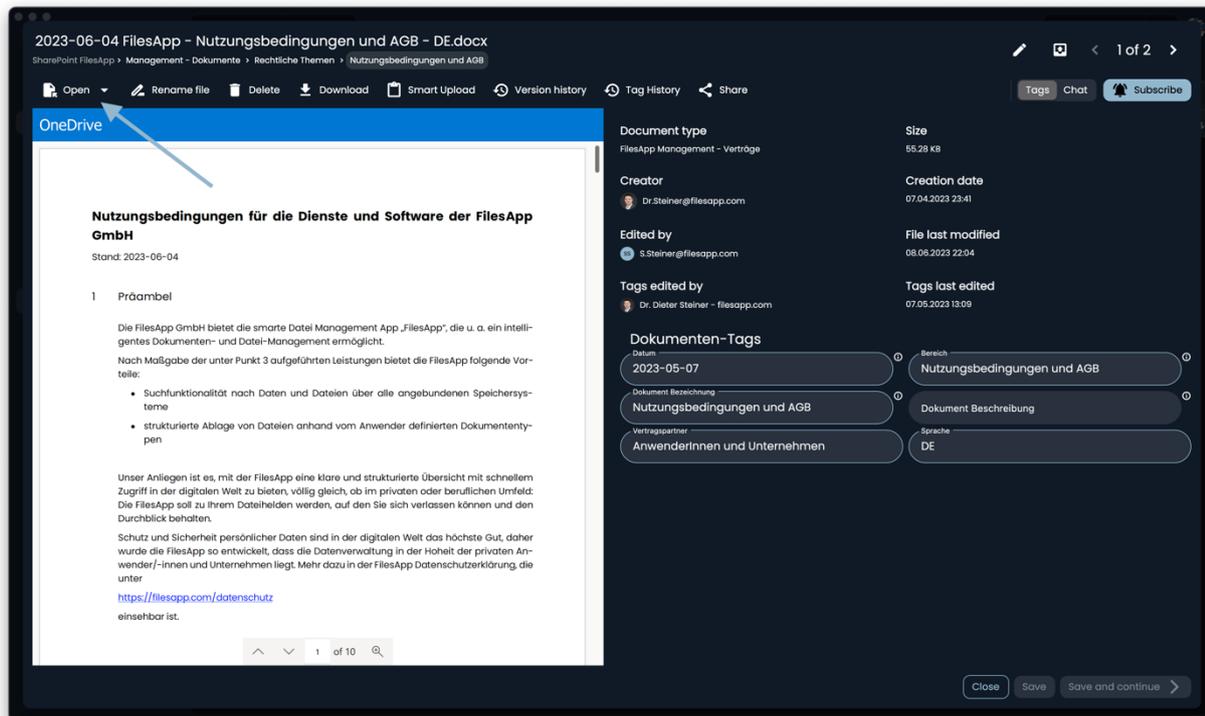
Depending on the range of functions offered by the connected storage system, files and directories can be shared via the share function in FilesApp.

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



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.



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 <https://filesapp.com/pricing/> on the website <https://filesapp.com/pricing/>.

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 <https://web.filesapp.com/>.

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 <https://filesapp.com/download-en/>.

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 API-based 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 <https://filesapp.com/pricing>.

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

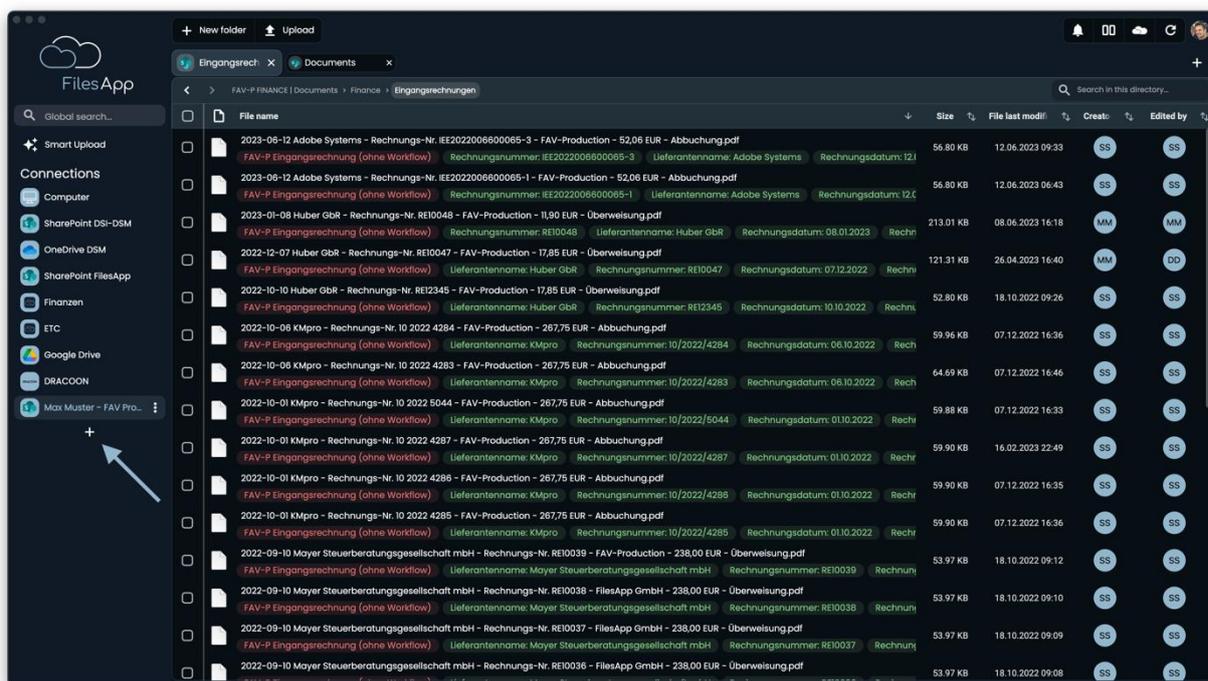
With Google Drive, Google provides users with a cloud storage system that allows them to share files and collaborate on documents.

2.3.1.2 Preconditions

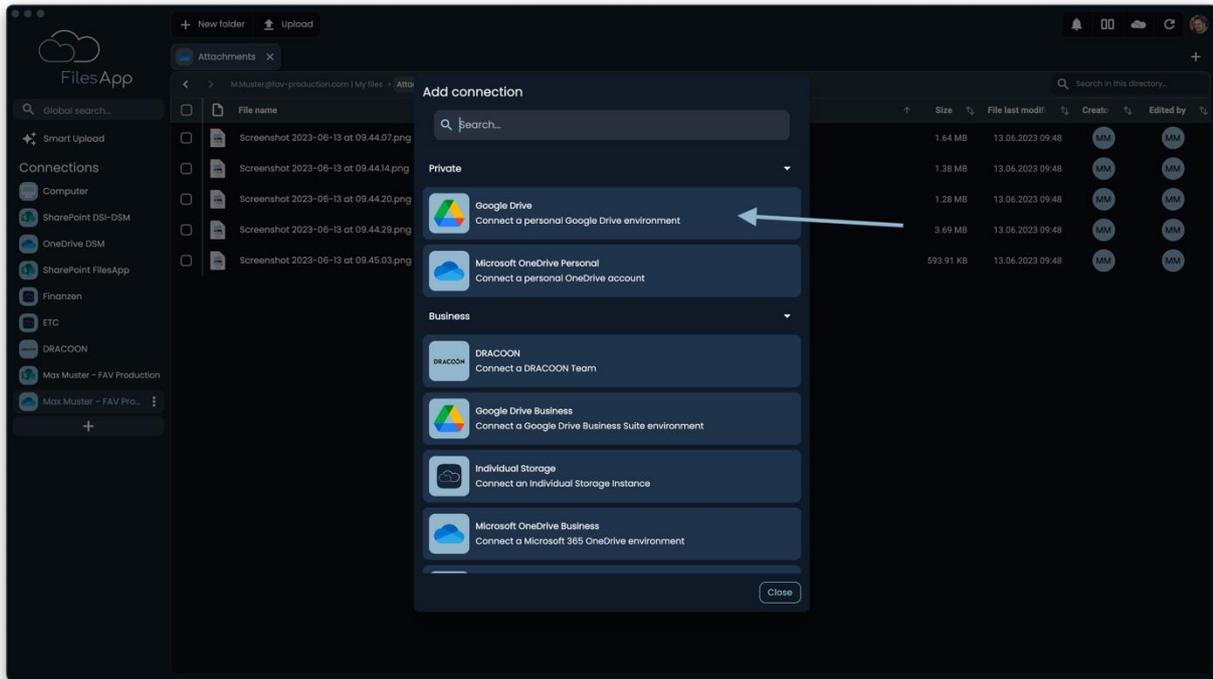
Active Google account with Google Drive storage access.

2.3.1.3 Setup

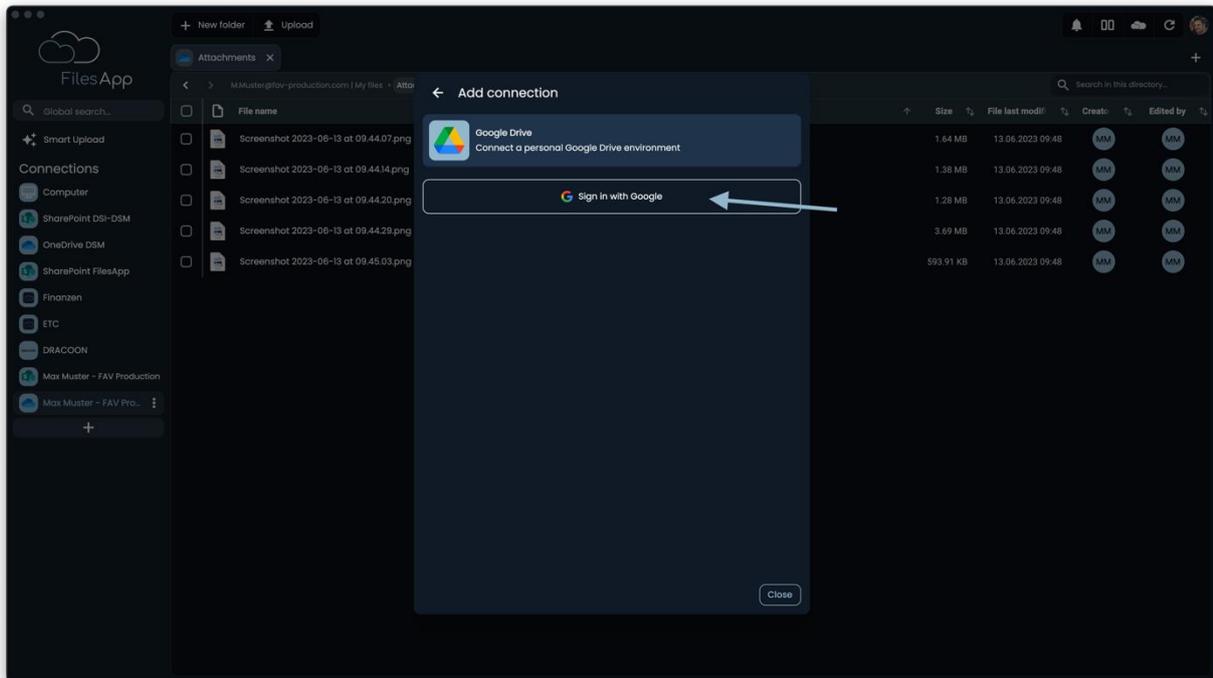
Setting up a FilesApp Google Drive Connection.



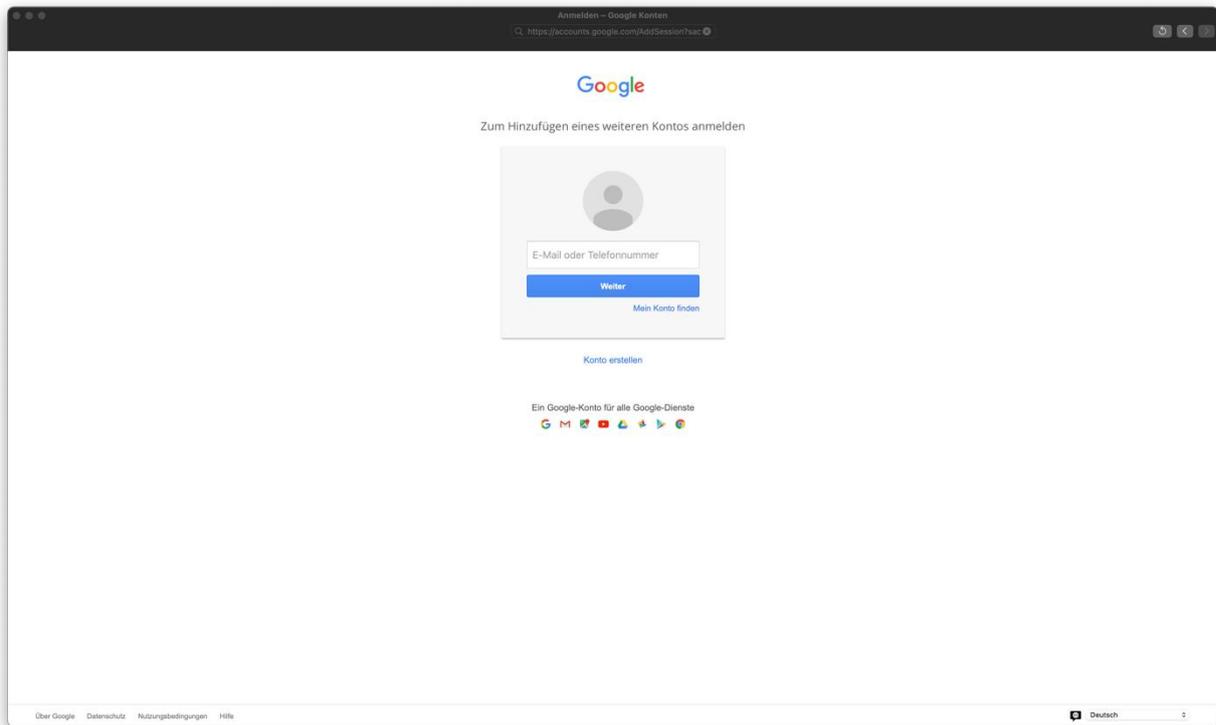
Set up a new connection with a Google Drive account in FilesApp using the plus sign in the Connections.



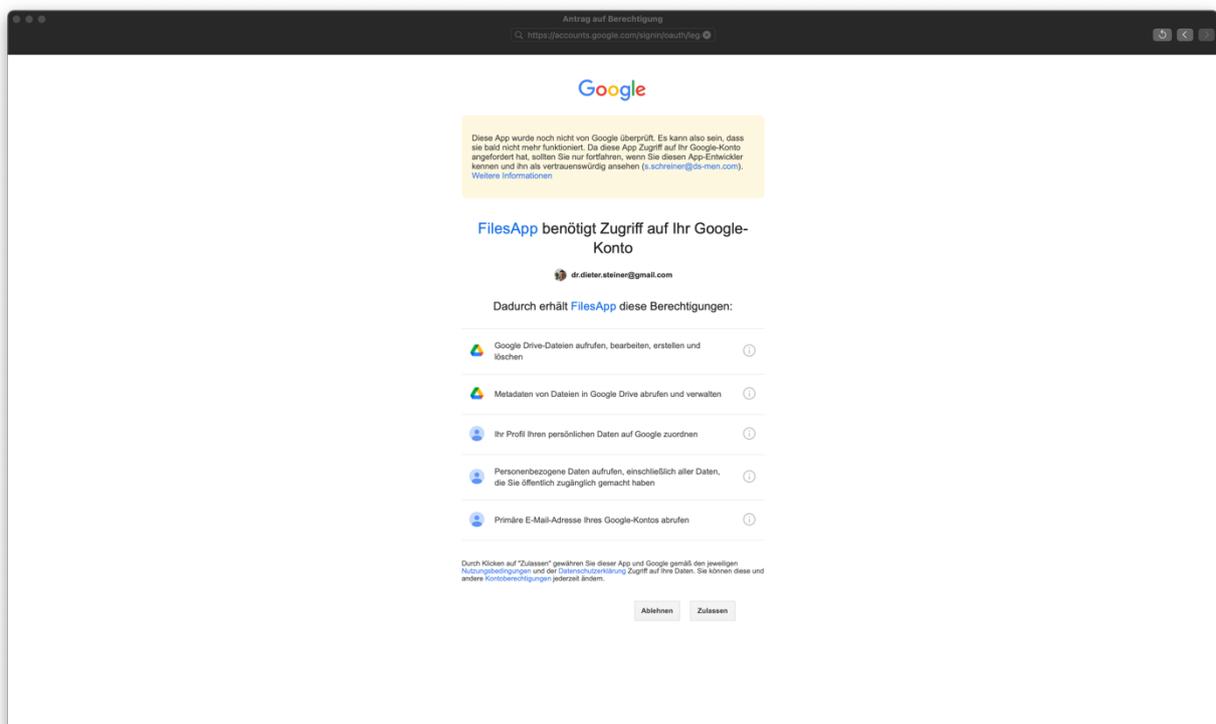
Select the Google Drive connection.



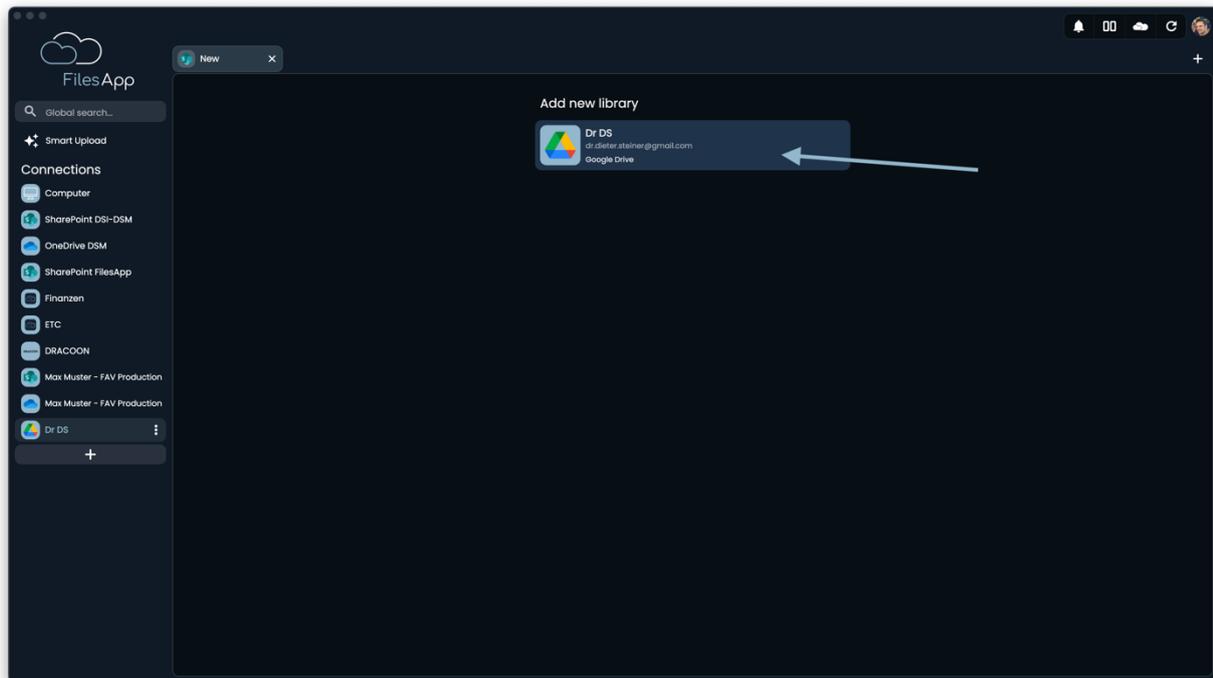
Select "Sign in with Google".



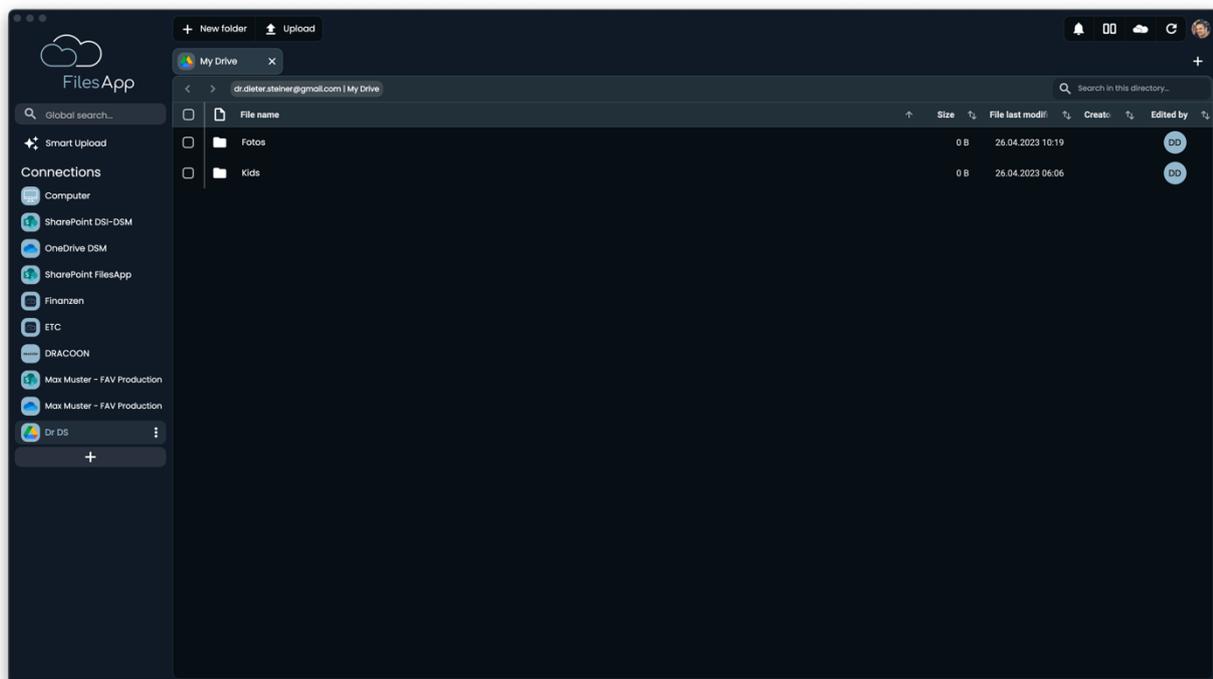
Enter and authenticate the credentials of the user's Google account for the relevant cloud storage.



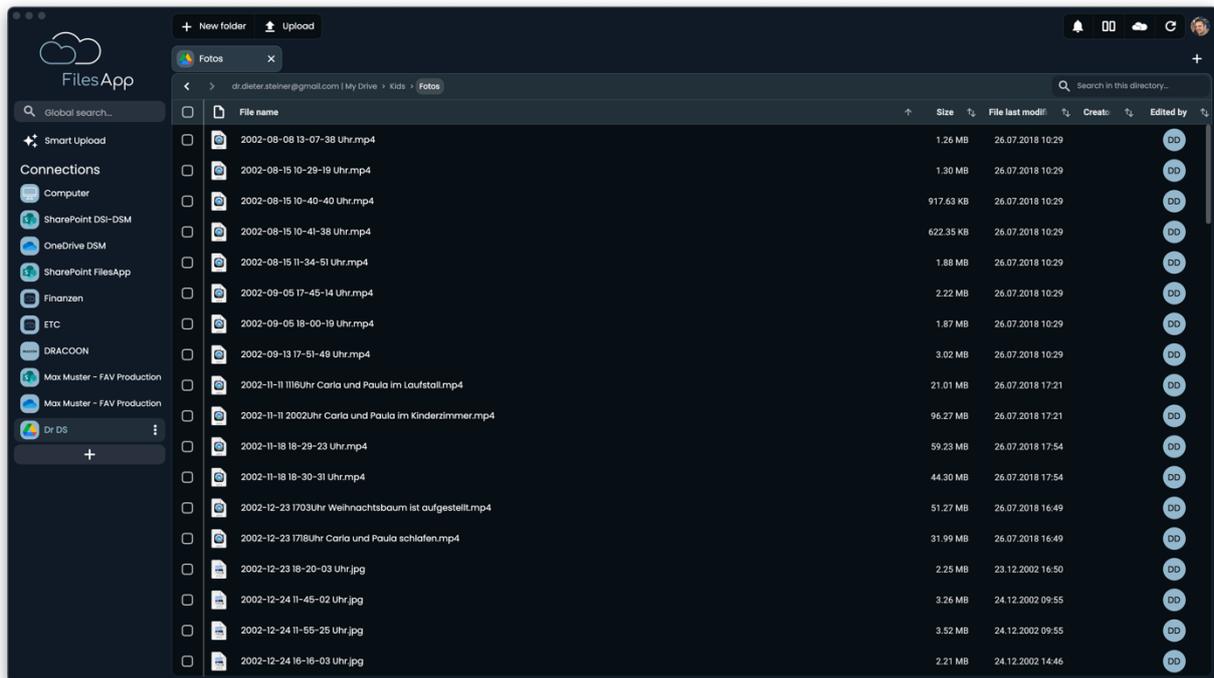
Allow the access permissions of the FilesApp.



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.



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 www.dracocon.com.

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
- AI 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 Dracocon into ERP, CRM systems, etc. with direct display of documents stored on Dracocon

2.4.1.2 Preconditions

Active and existing DRACoon account of the user.

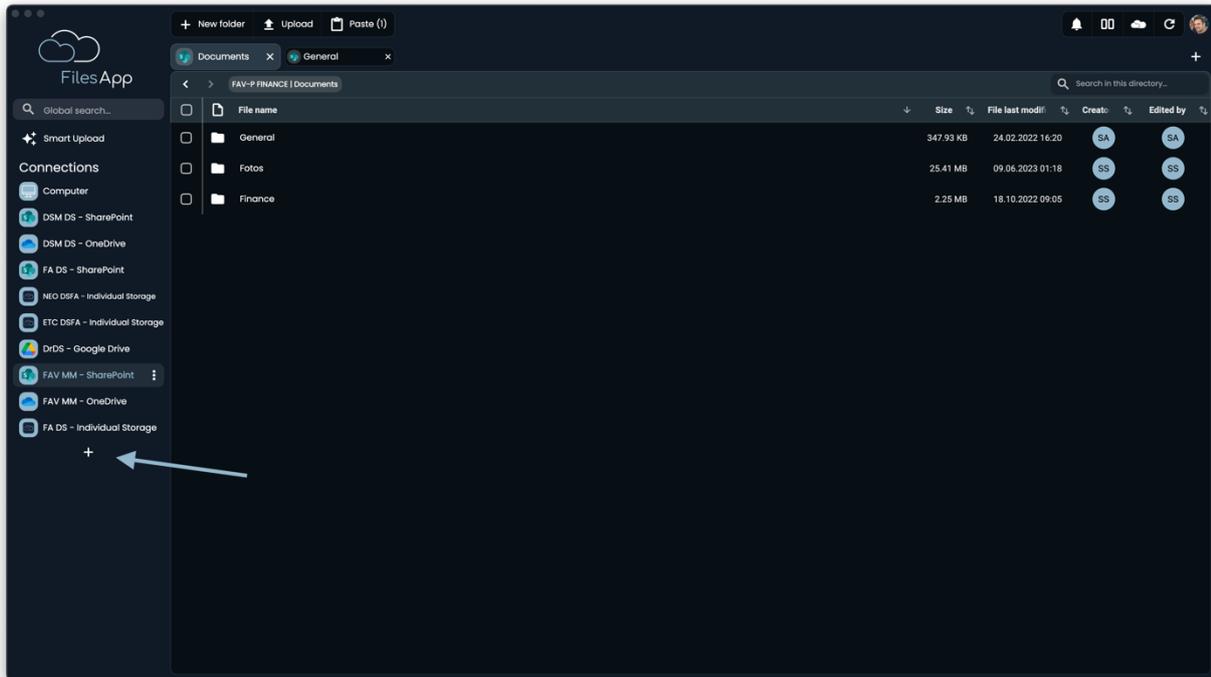
Active and existing FilesApp DRACoon Connector license - see <https://filesapp.com/pricing/>

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

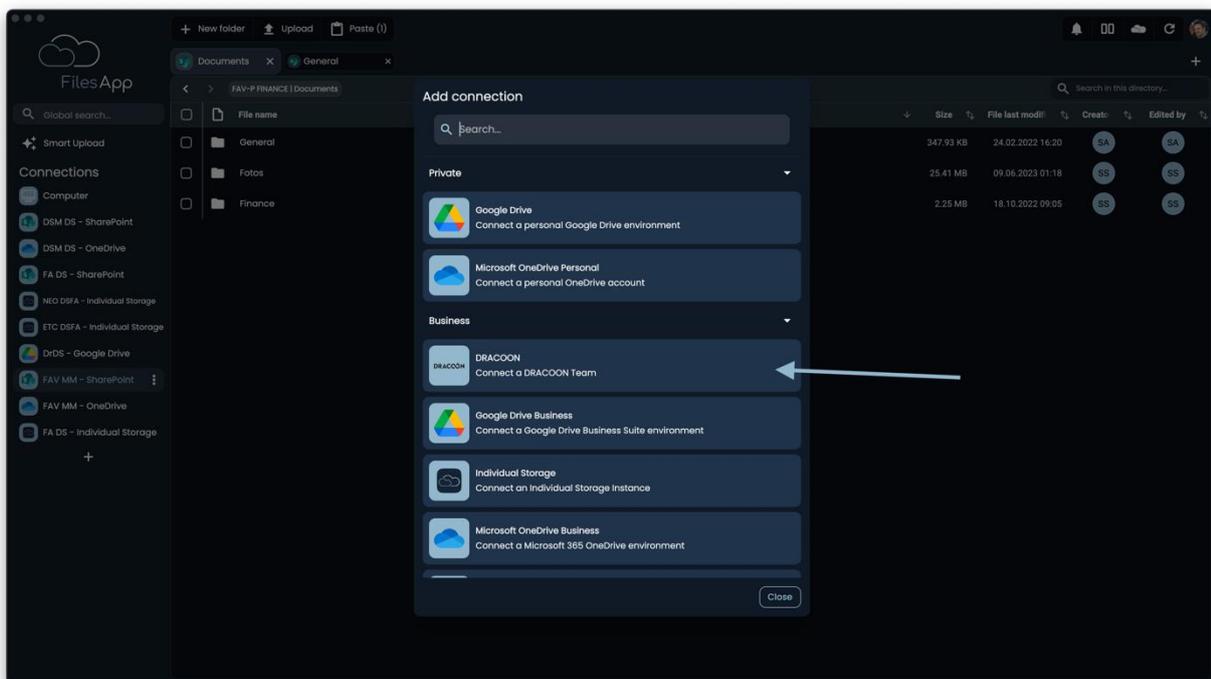
2.4.1.3 Setup

Setting up a FilesApp DRACoon Connection.

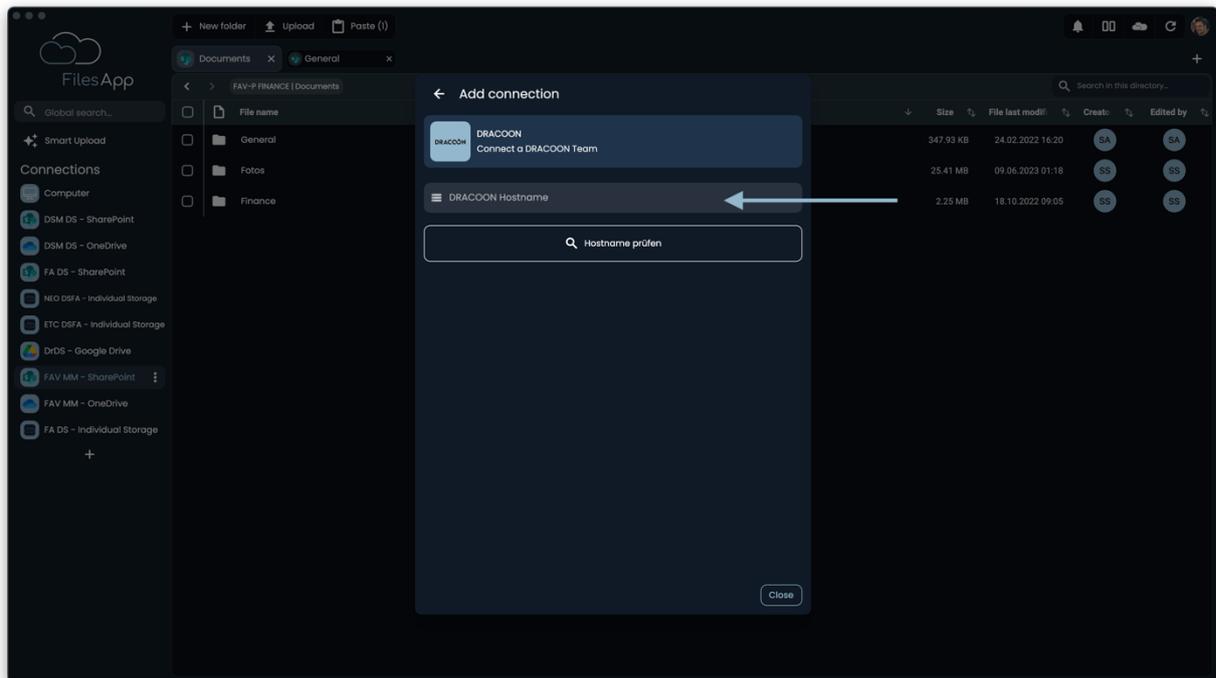
2.4.1.3.1 Setting up the first document library of the Connection



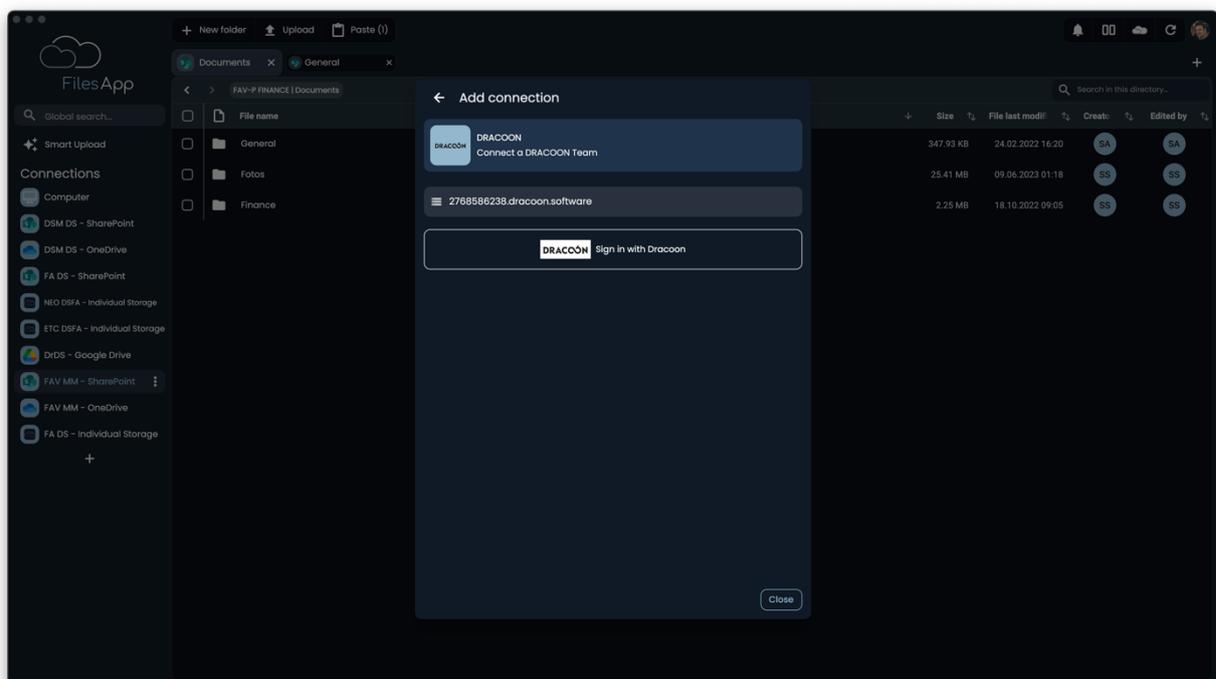
Set up a new connection to a DRACOOON account in FilesApp by clicking on the plus sign next to the Connections.



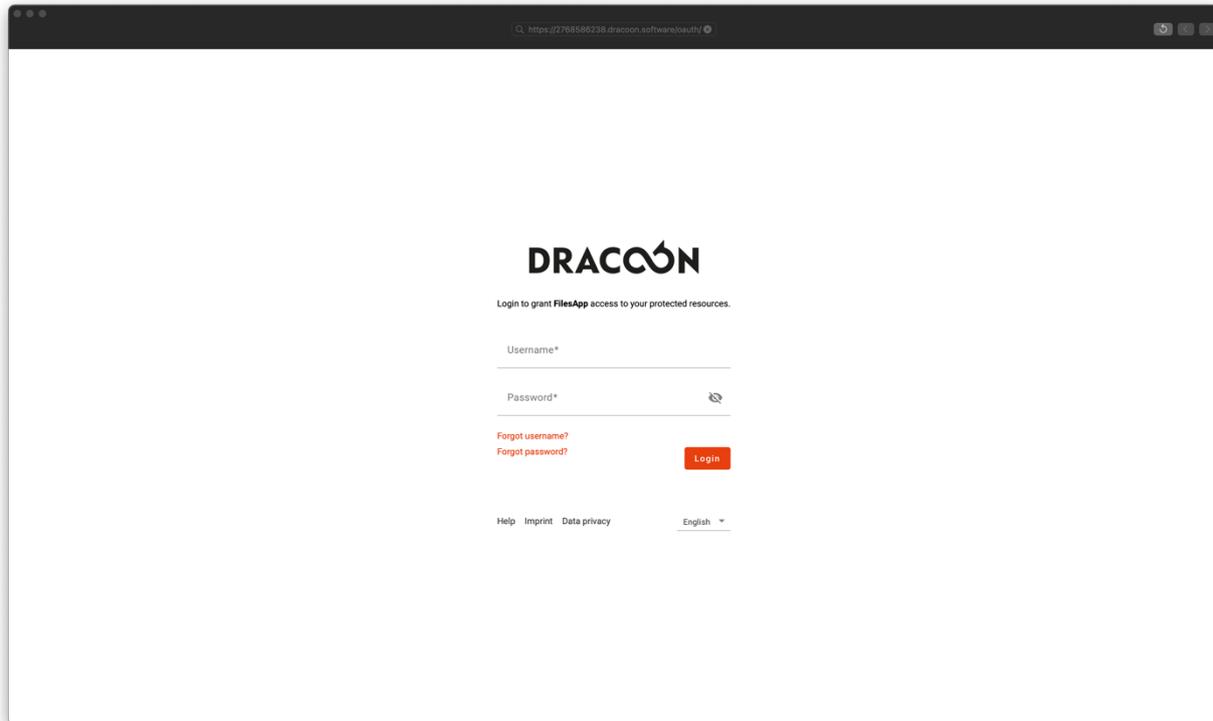
Select the DRACOOON connection.



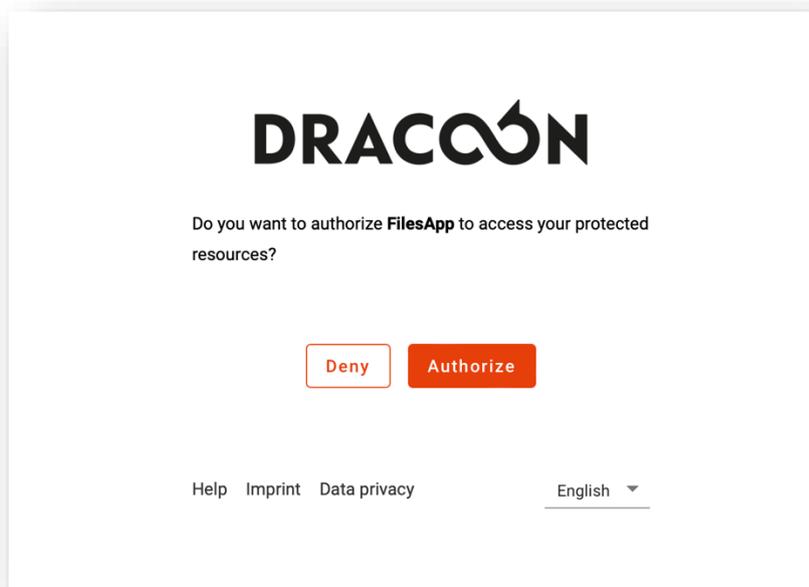
Enter the host name (URL) to the DRACCOON environment and check it via "Check Host Name". The host name is the URL with which DRACCOON makes the environment available for this tenant.



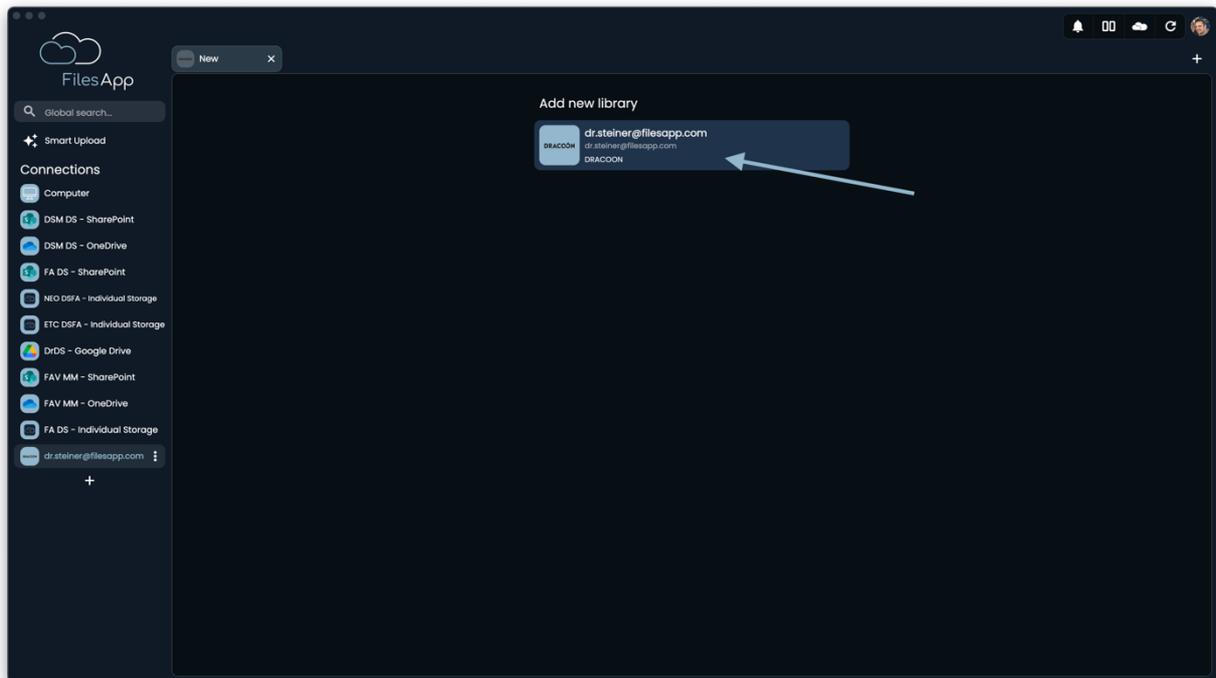
If the host name is successfully checked, "Sign in with DRACCOON" can be selected.



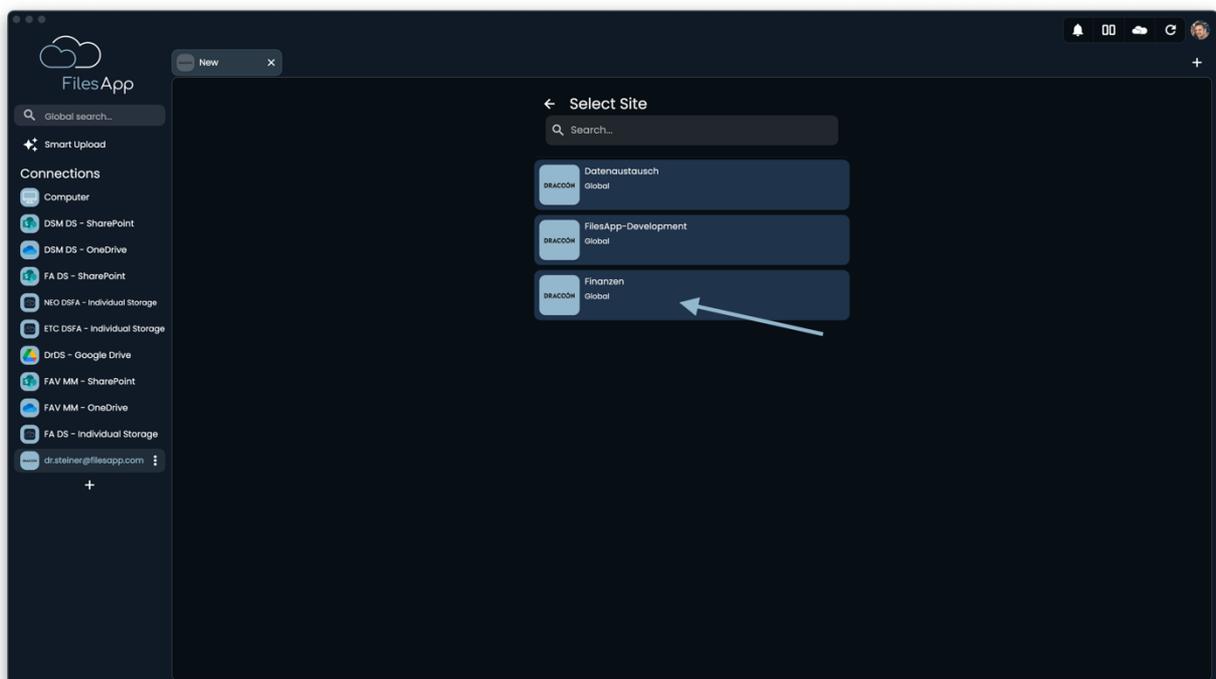
Enter and authenticate the login data with the email address of the user's DRACCOON account for the relevant DRACCOON environment.



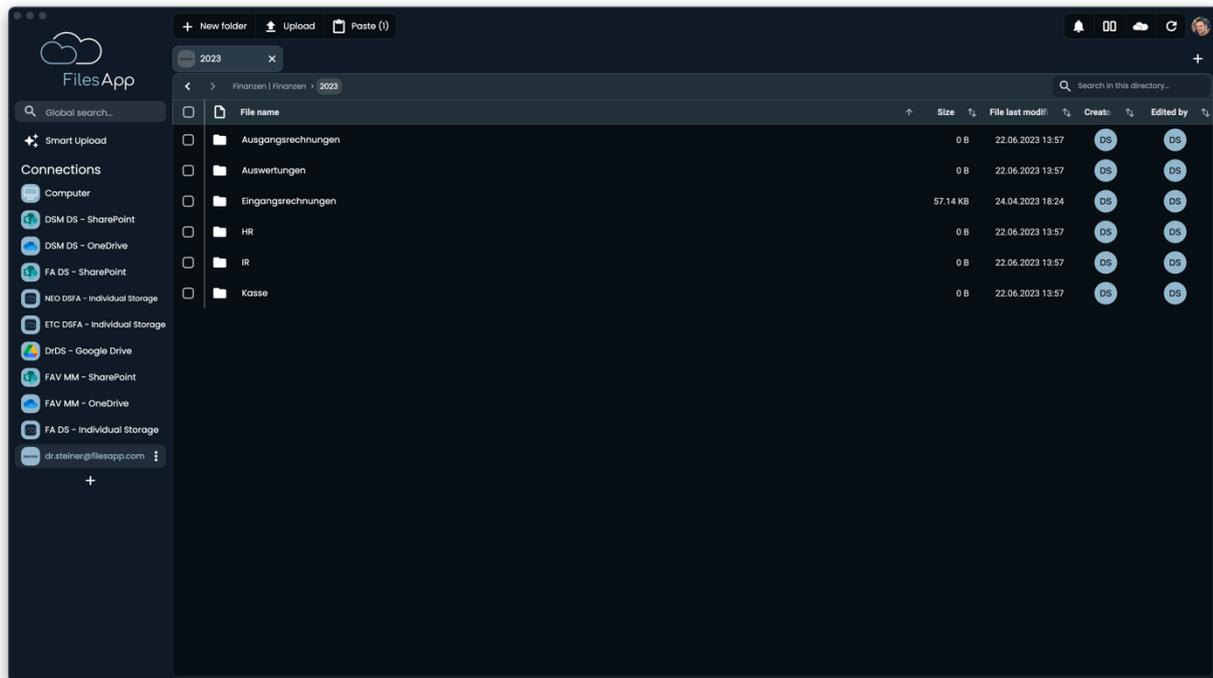
Release the FilesApp usage in the DRACCOON environment.



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

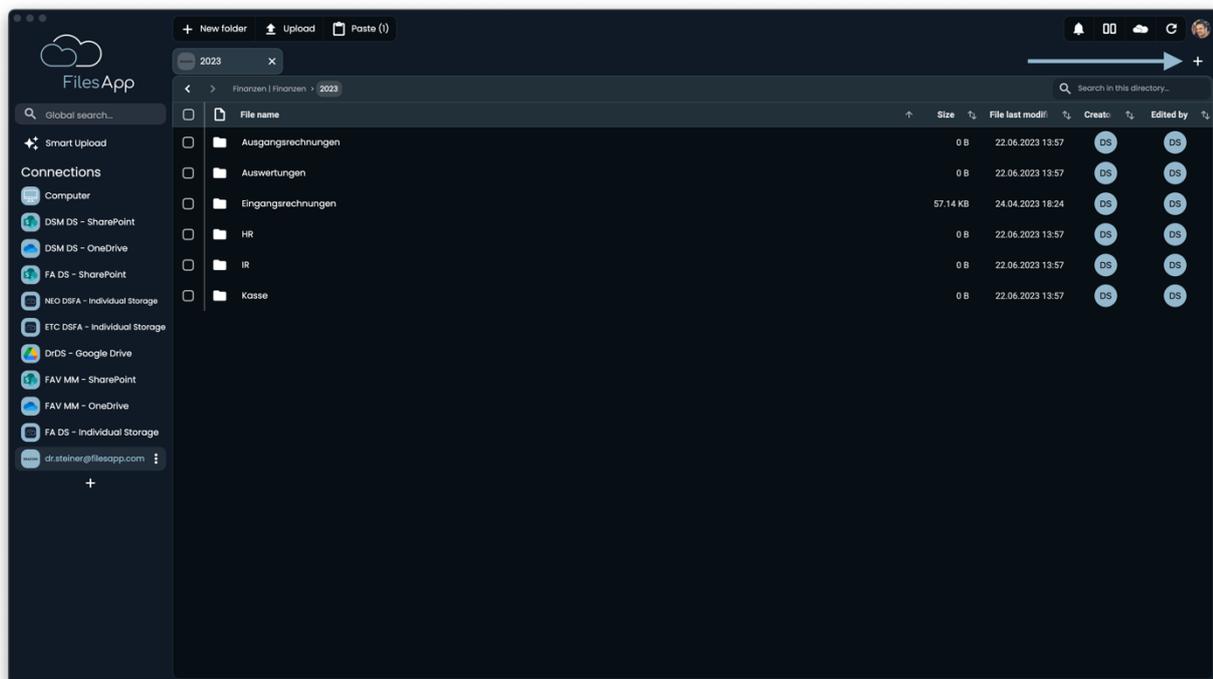


The data rooms activated for the user are displayed as "sites" and can be integrated as document libraries. In this example, "Finance".

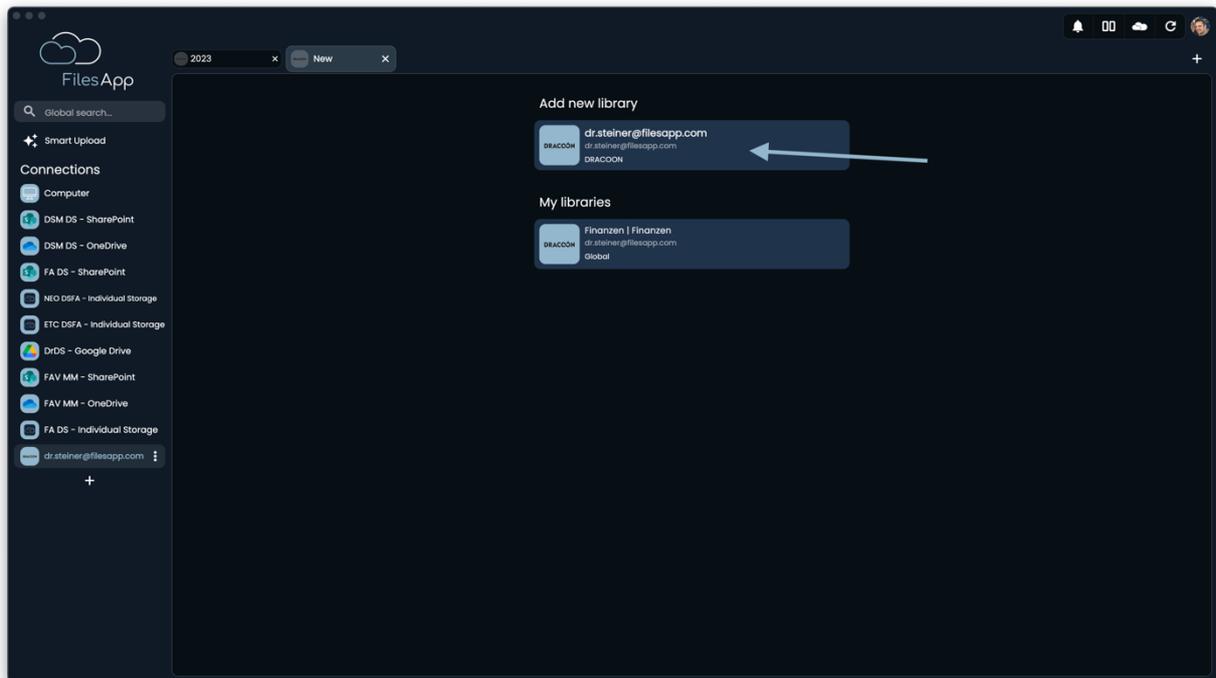


The directory structure of the selected document library is then available in FilesApp. The files are indexed and are also available via the search after a short time.

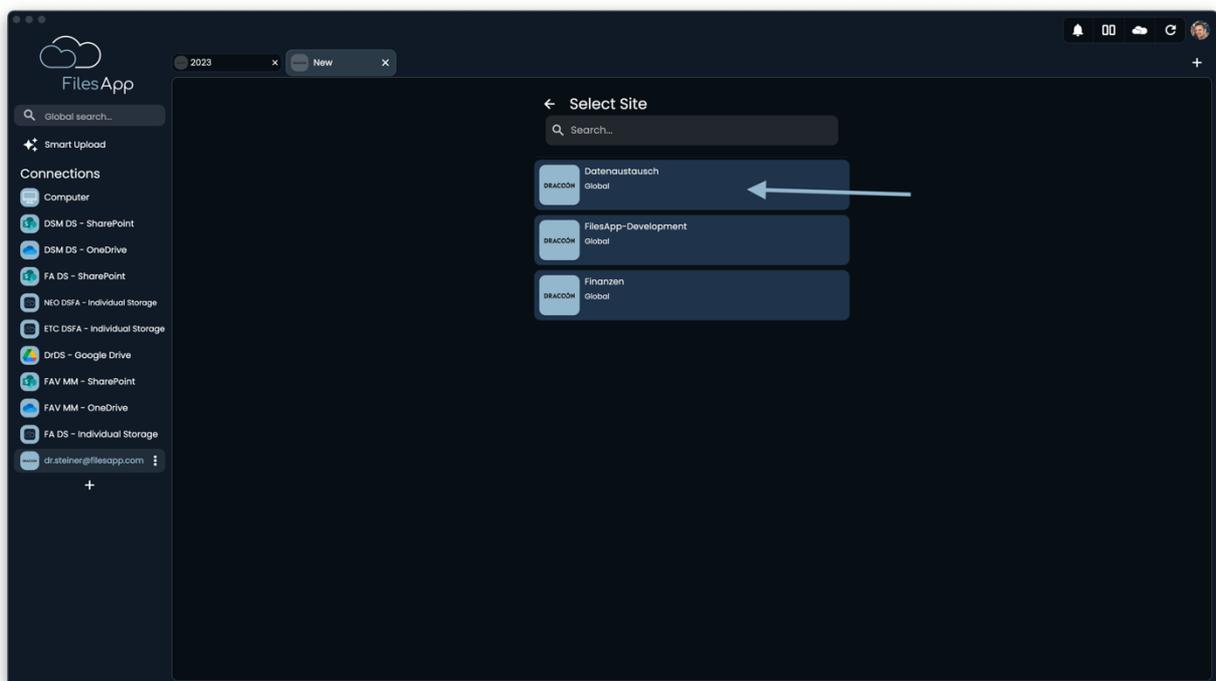
2.4.1.3.2 Setting up additional Documents Library of the Connection



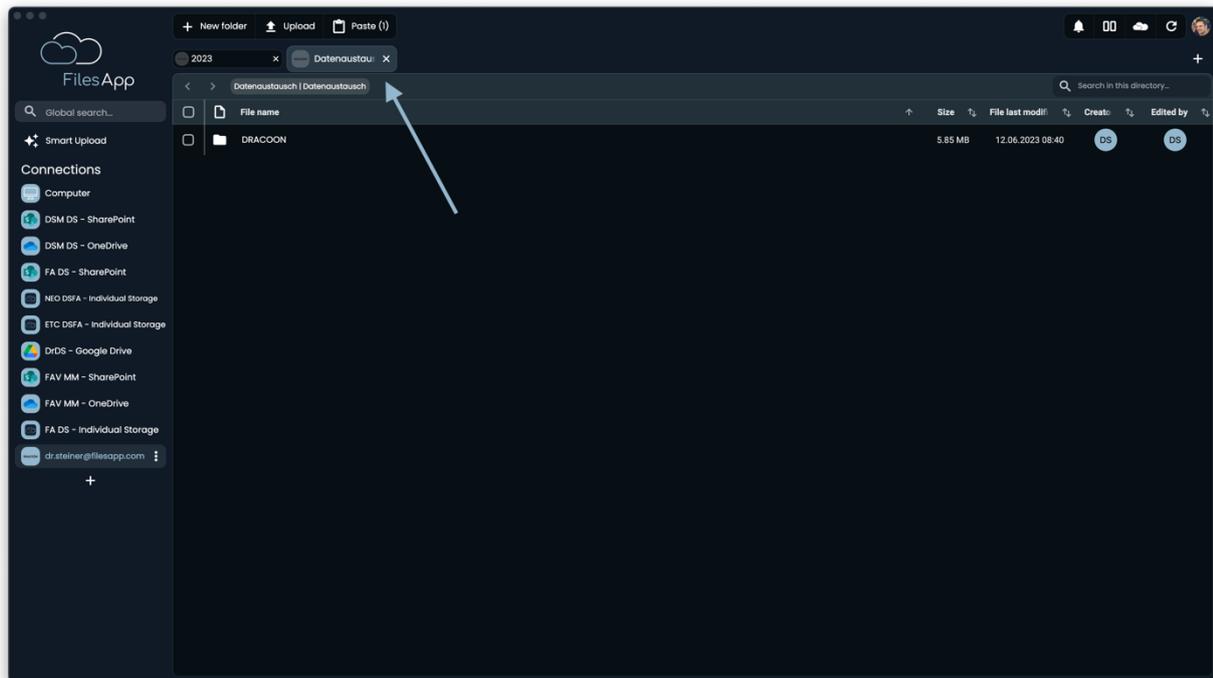
Use the + symbol in the upper right corner of FilesApp window to add a new document library.



Select "Add New Library".



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

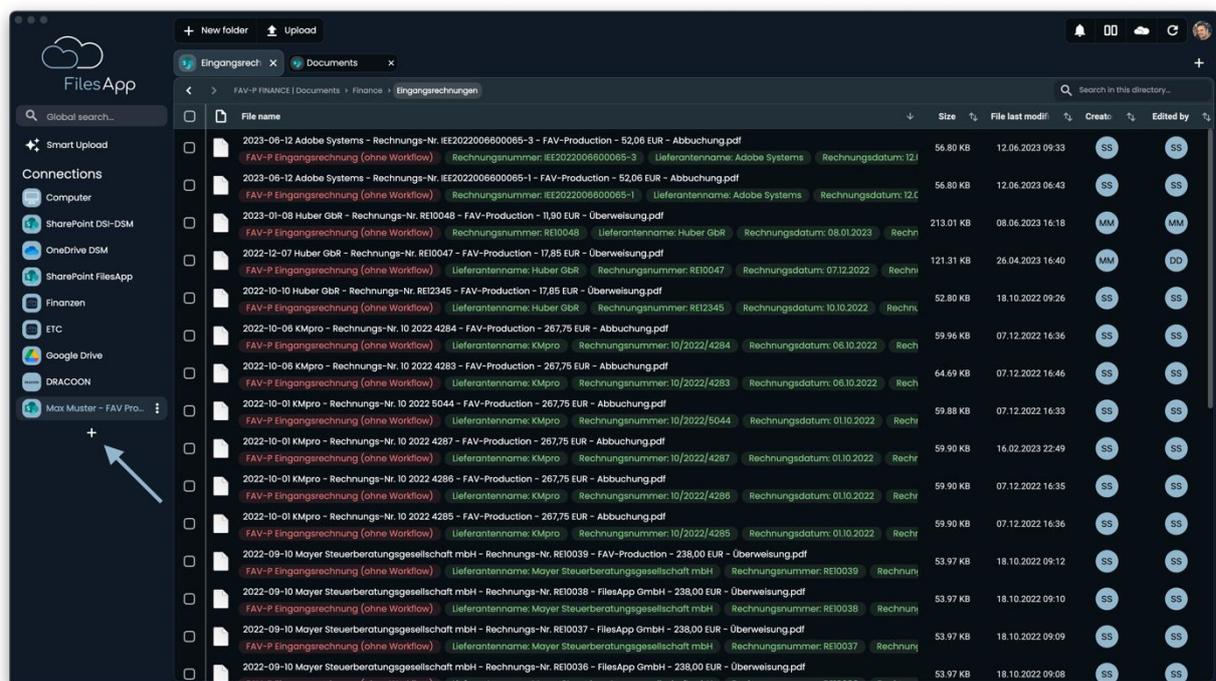
With Google Workspace, Google provides companies and organizations with a cloud storage system per workspace that allows them to share files and work together on documents, and offers personal and group sharing in addition to the personal Google Drive storage systems. You can see it as a counterpart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

2.4.2.2 Preconditions

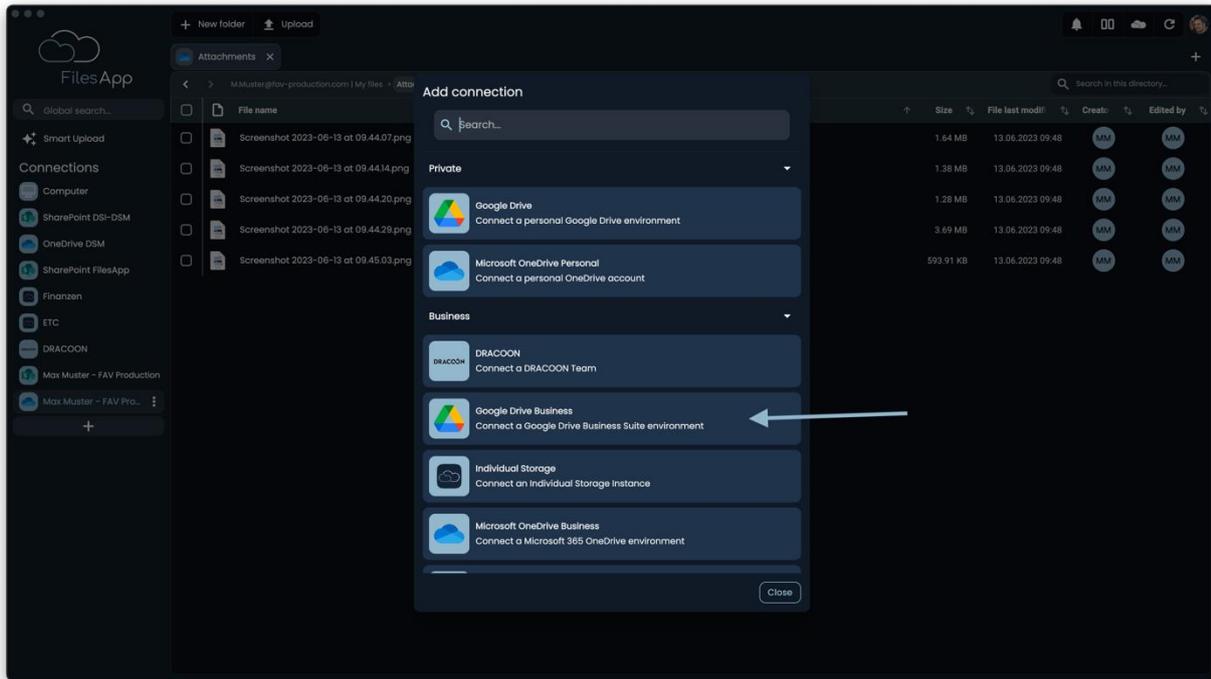
Active Google Workspace account with Google Drive storage access.

2.4.2.3 Setup

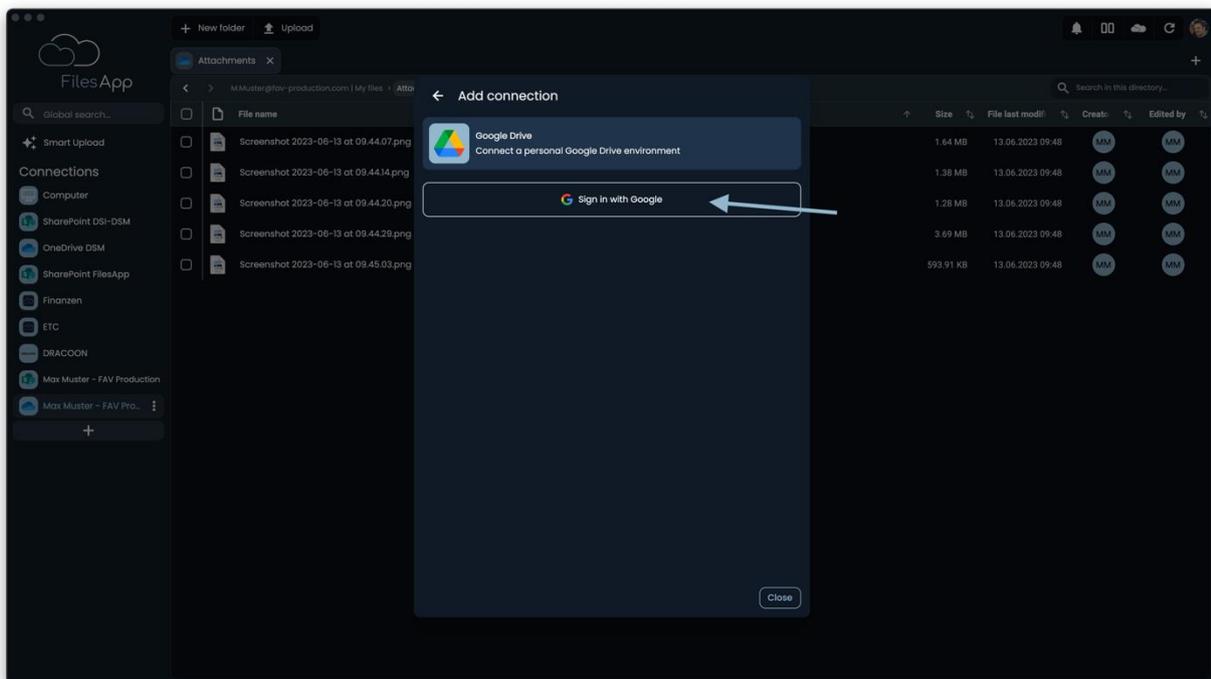
Setting up a FilesApp Google Drive Connection.



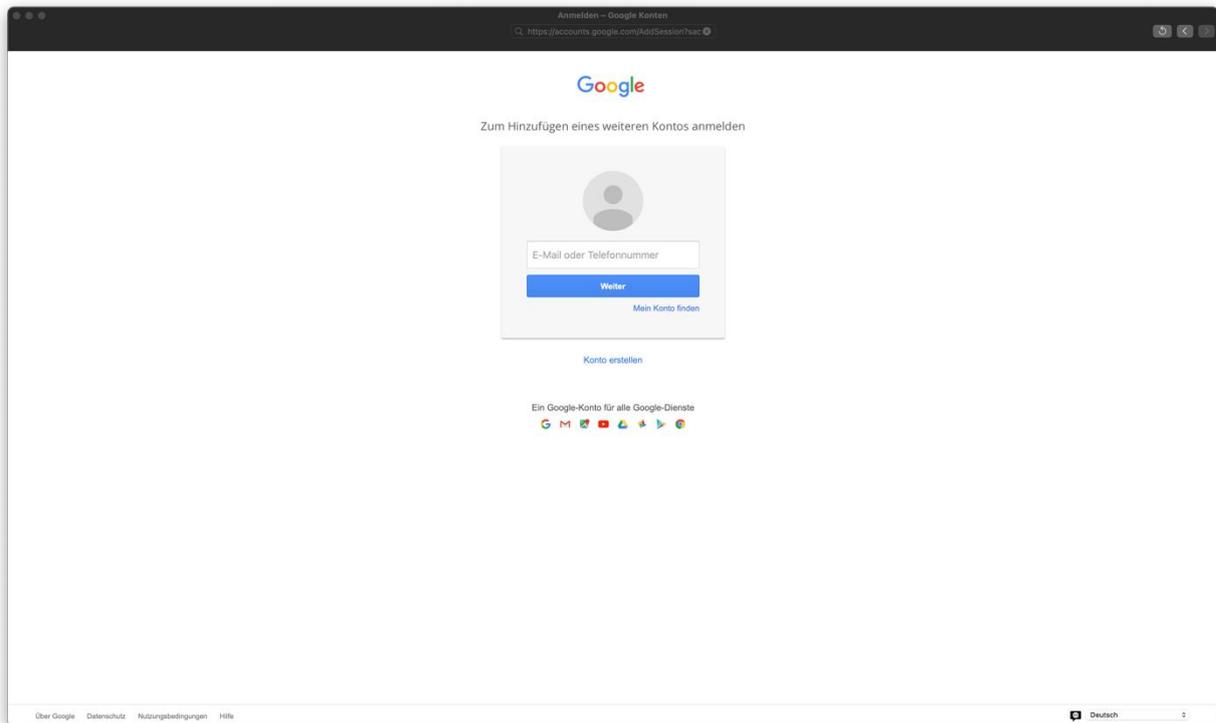
Set up a new connection with a Google Drive account in FilesApp using the plus sign in the Connections.



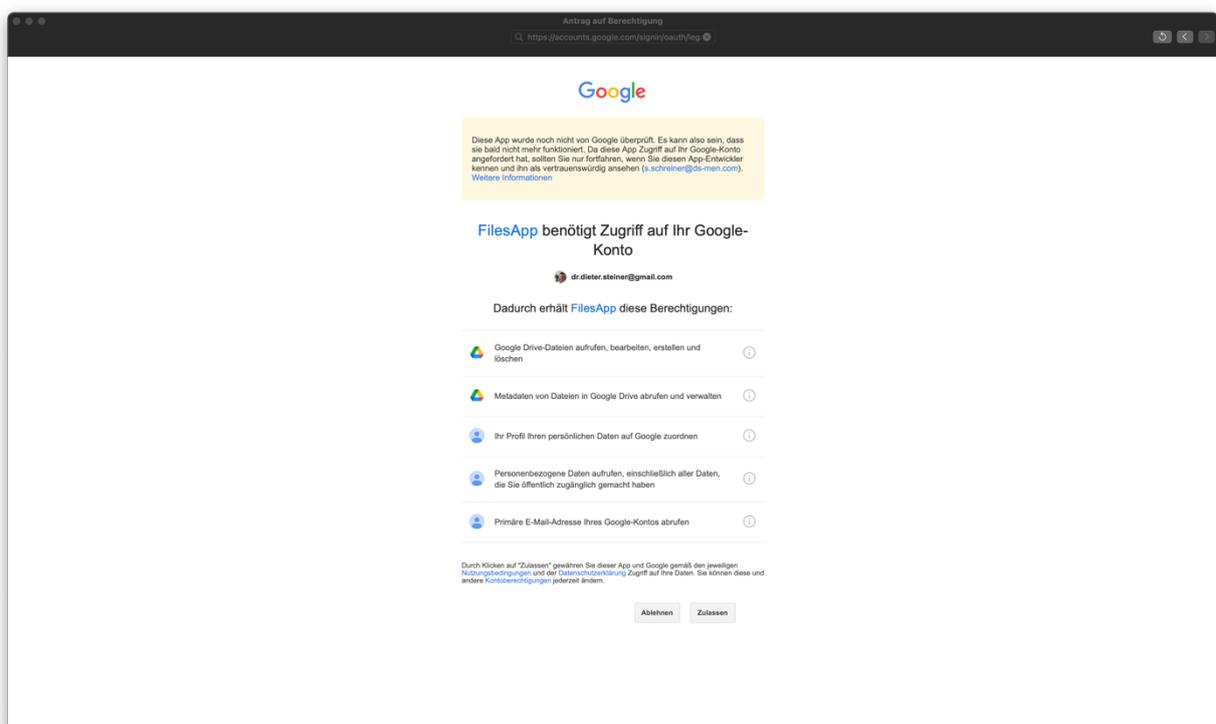
Select Google Drive Business connection.



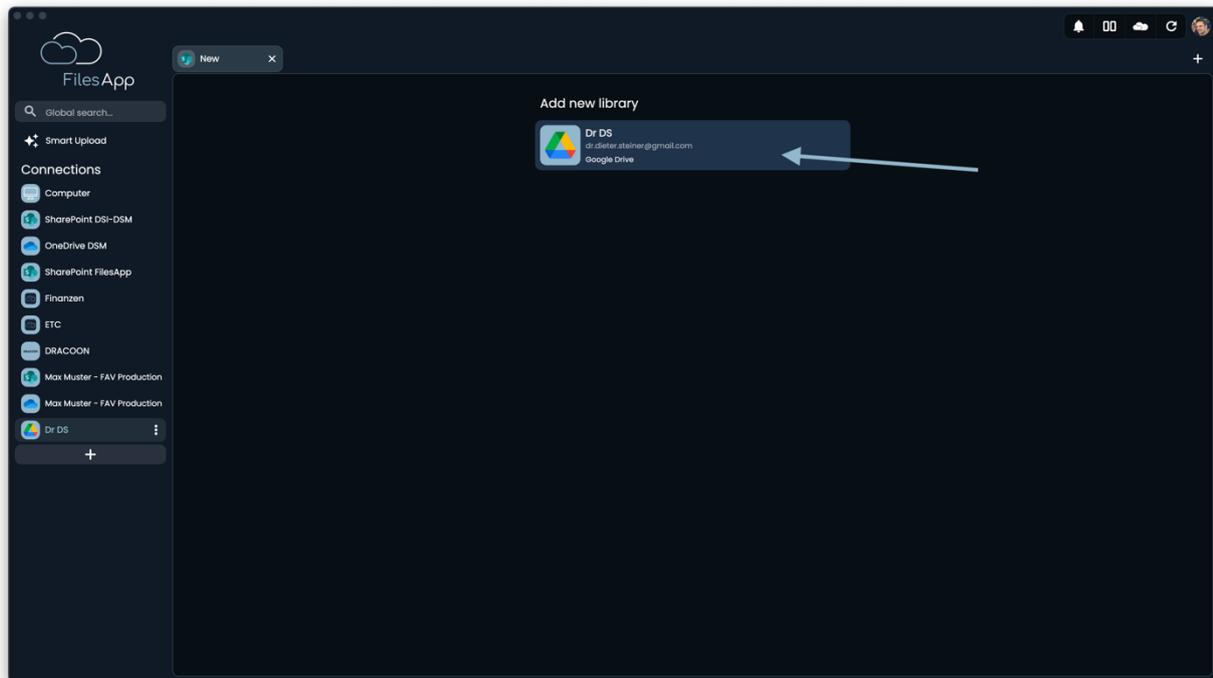
Select „Sign in with Google“.



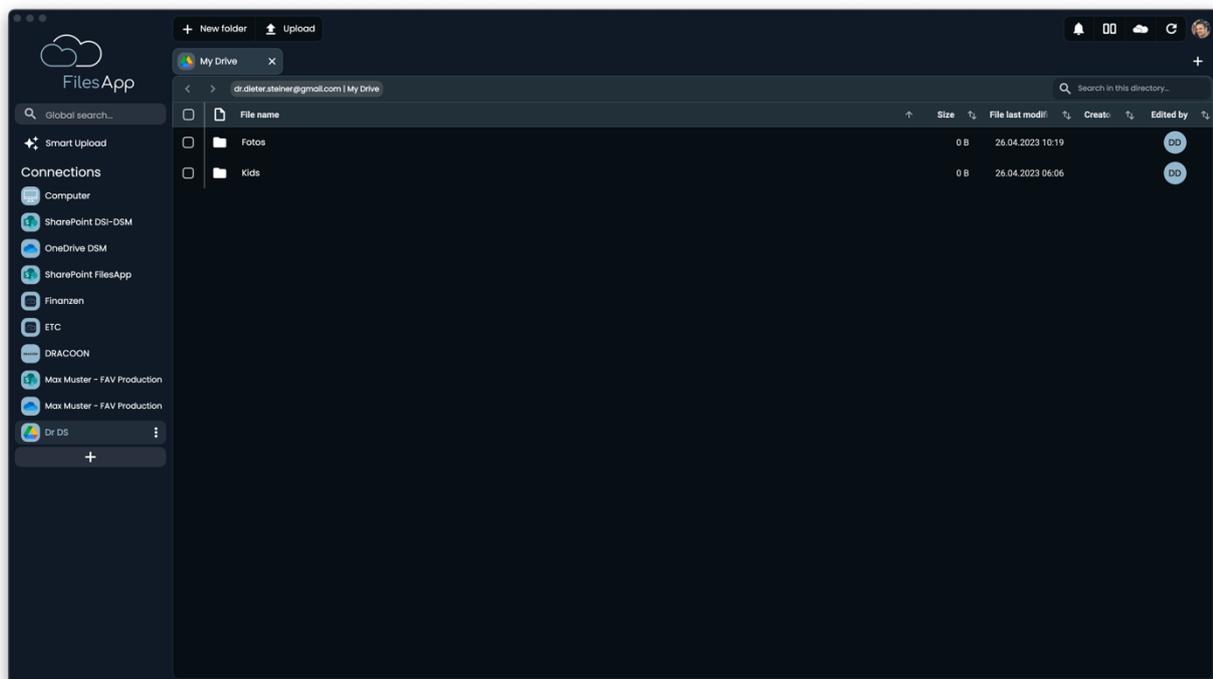
Enter and authenticate the credentials of the user's Google account for the relevant cloud storage.



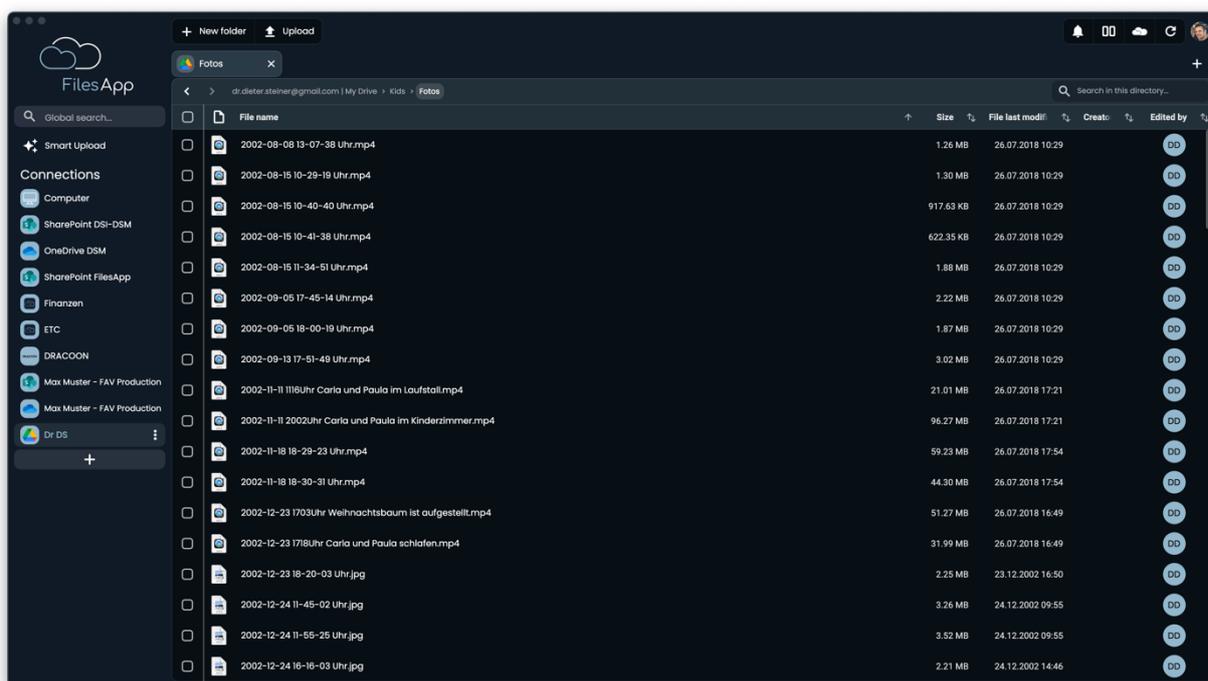
Allow the access permissions of FilesApp.



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.



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 <https://filesapp.com/pricing/> 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.

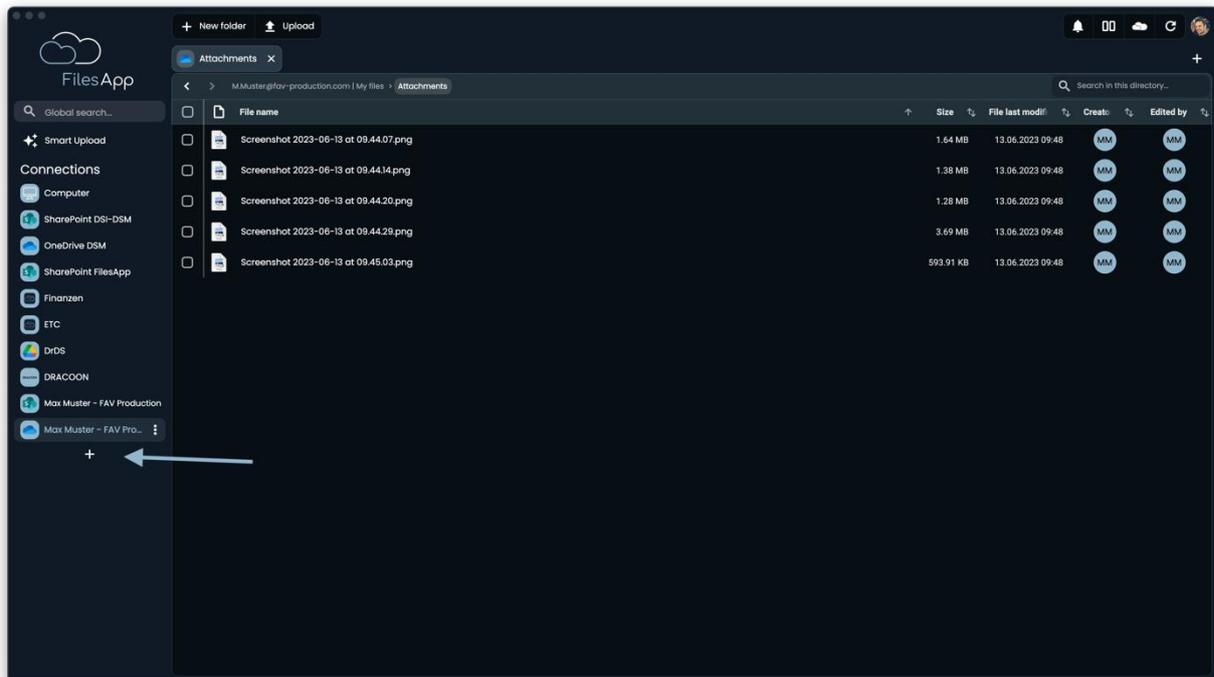
The prerequisite for the use of individual storage is the provision of an appropriate system.

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

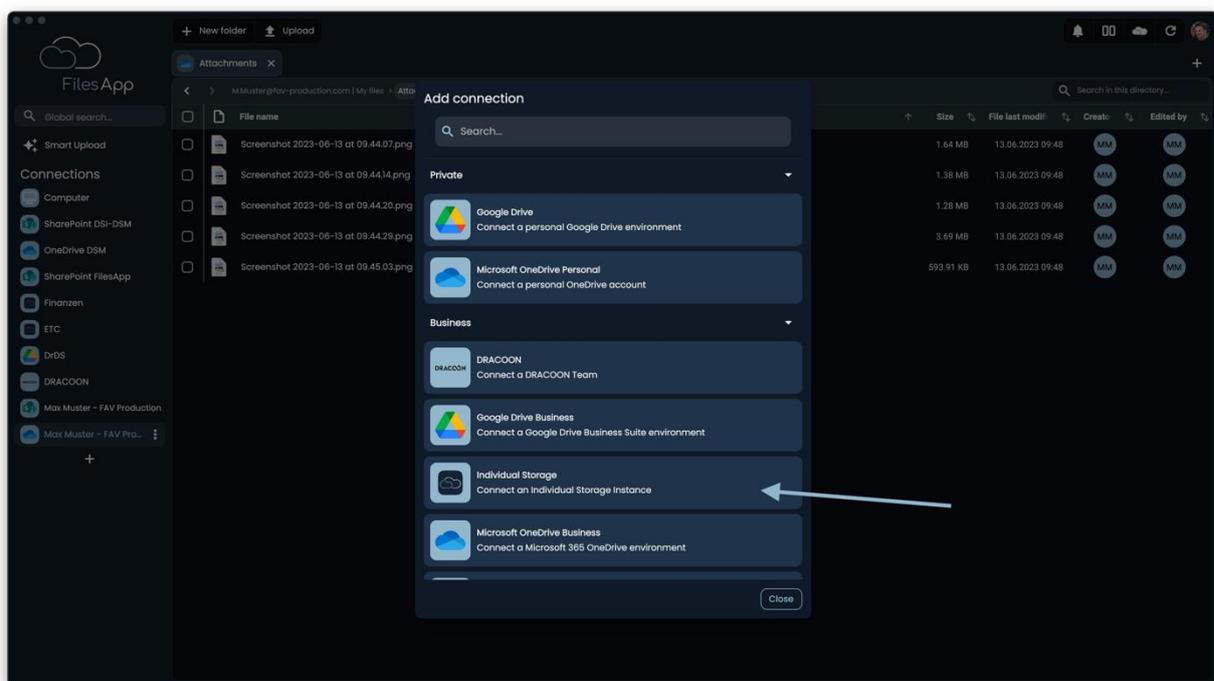
2.4.3.3 Setup

Setting up a FilesApp Individual Storage Connection.

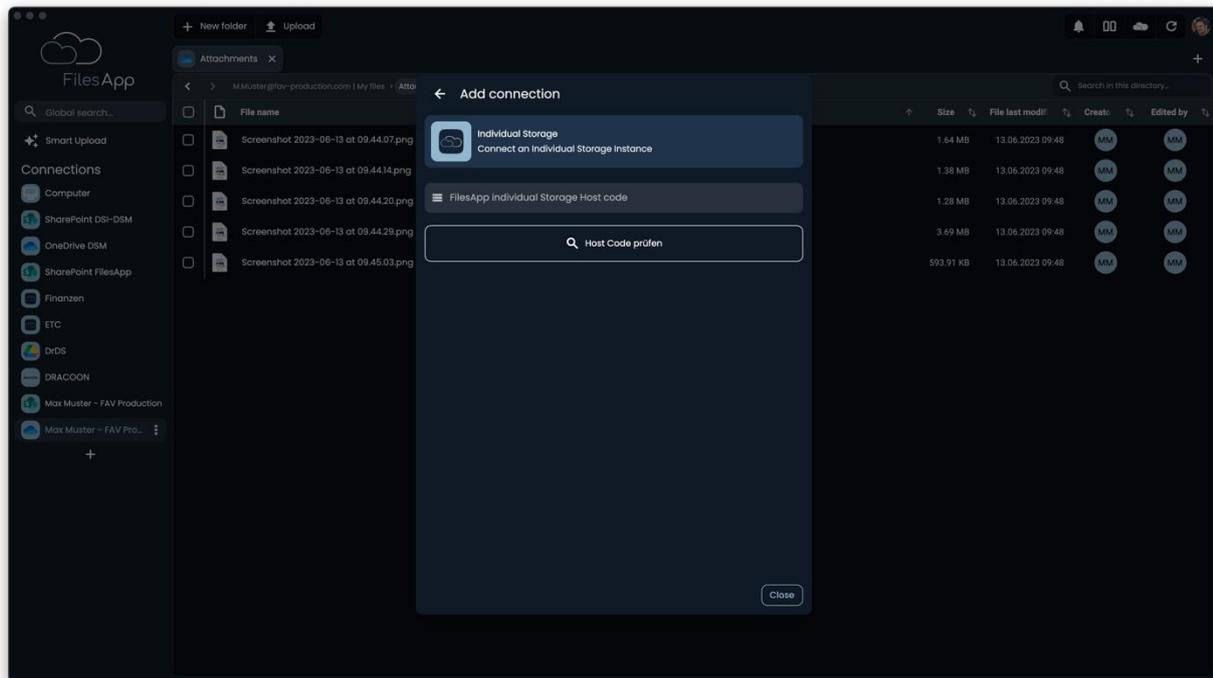
2.4.3.1 Setting up the first document library of the Connection



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

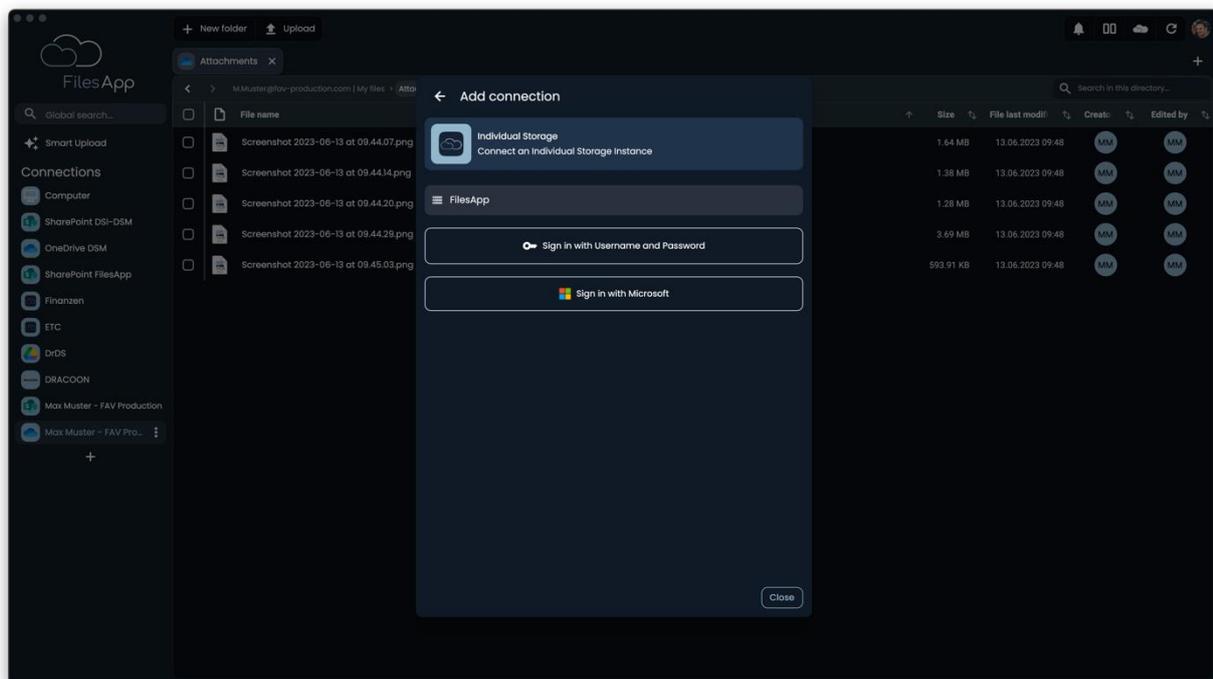


Select the Individual Storage Connection.



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

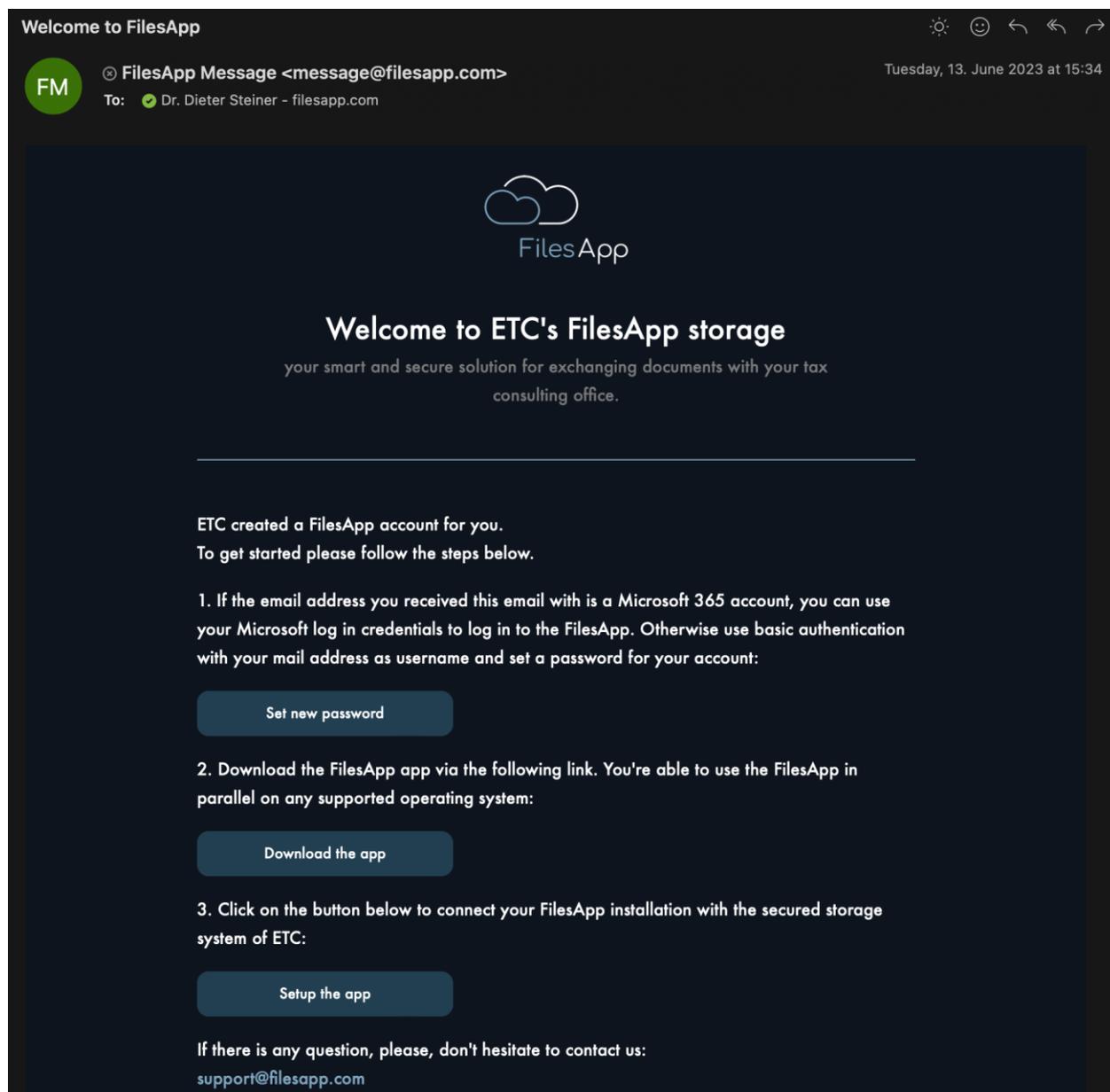
The host code is communicated to the admin of the Individual Storage when the Individual Storage environment is put into operation, and the users in turn receive it from their administrators.



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

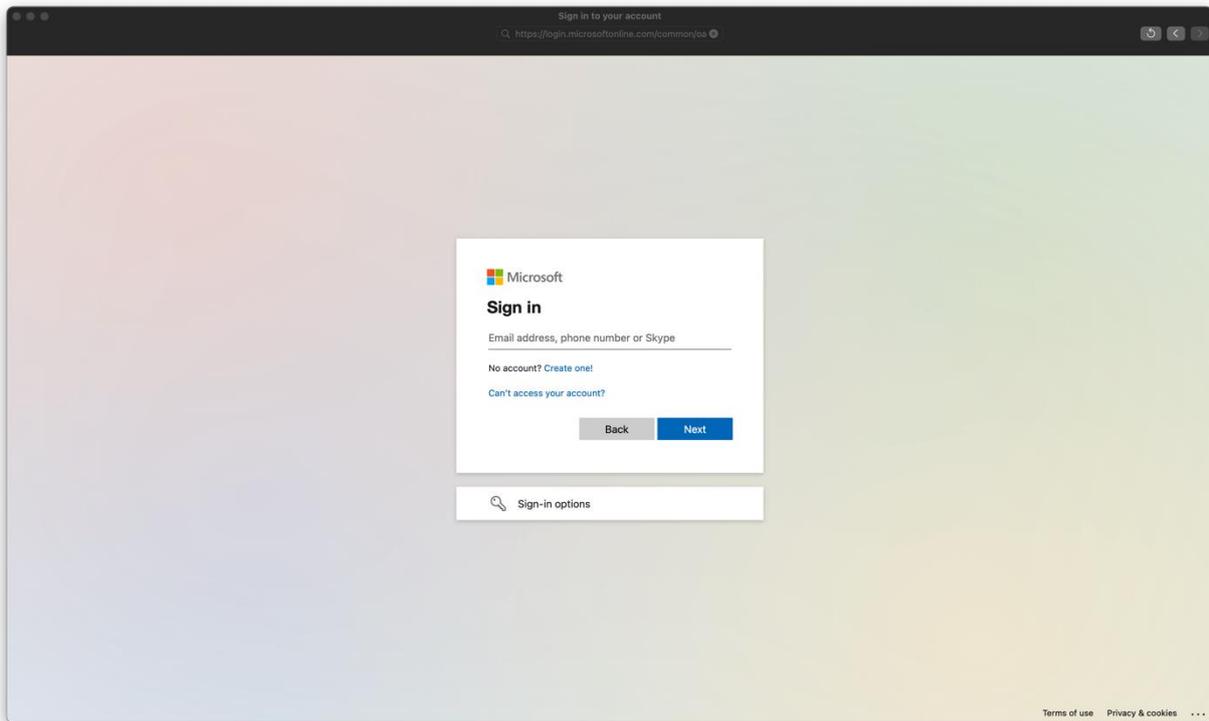
Via the welcome email when the administrator sets up a user, the user can either set up a username and password to log in to the Individual Storage or log in to the Individual Storage

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

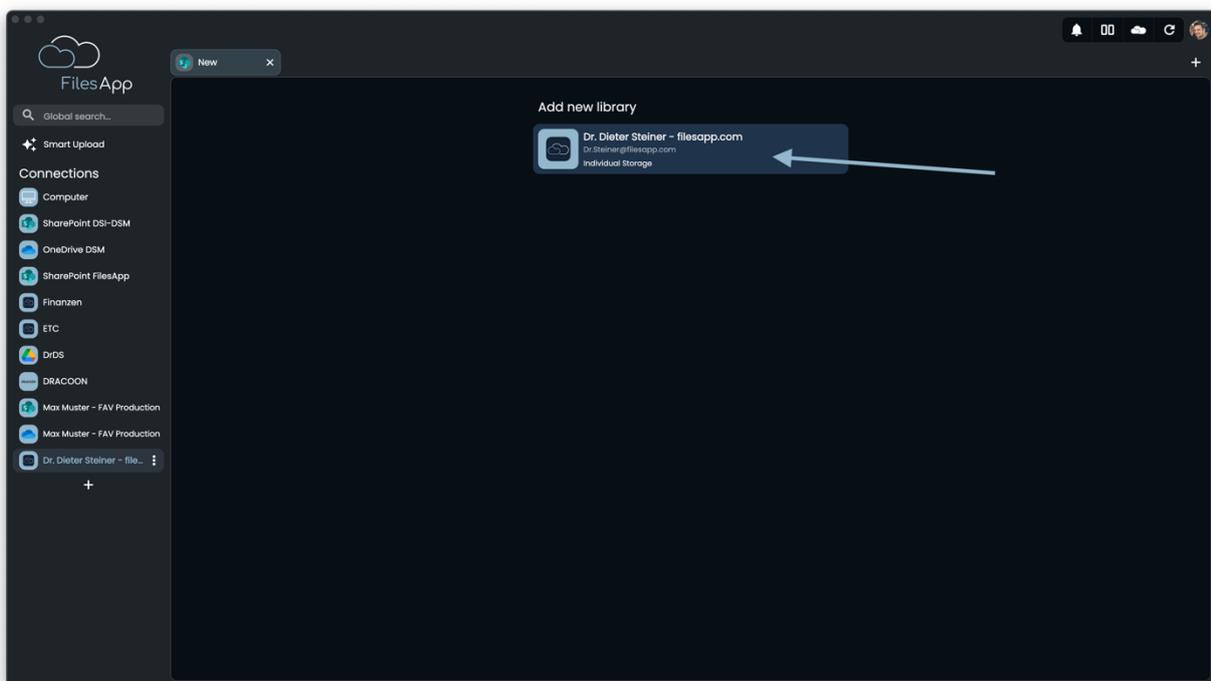


The screenshot shows an email interface with a dark theme. At the top left, it says "Welcome to FilesApp". The sender is "FilesApp Message <message@filesapp.com>" with a green circular icon containing "FM". The recipient is "Dr. Dieter Steiner - filesapp.com". The date and time are "Tuesday, 13. June 2023 at 15:34". The main content of the email features the FilesApp logo and the heading "Welcome to ETC's FilesApp storage" with the subtitle "your smart and secure solution for exchanging documents with your tax consulting office." Below this, the text states: "ETC created a FilesApp account for you. To get started please follow the steps below." It then lists three steps: 1. Log in with Microsoft 365 credentials or basic authentication. 2. Download the FilesApp app. 3. Connect the app to the secured storage system. Each step is followed by a button: "Set new password", "Download the app", and "Setup the app". At the bottom, it provides contact information: "If there is any question, please, don't hesitate to contact us: support@filesapp.com".

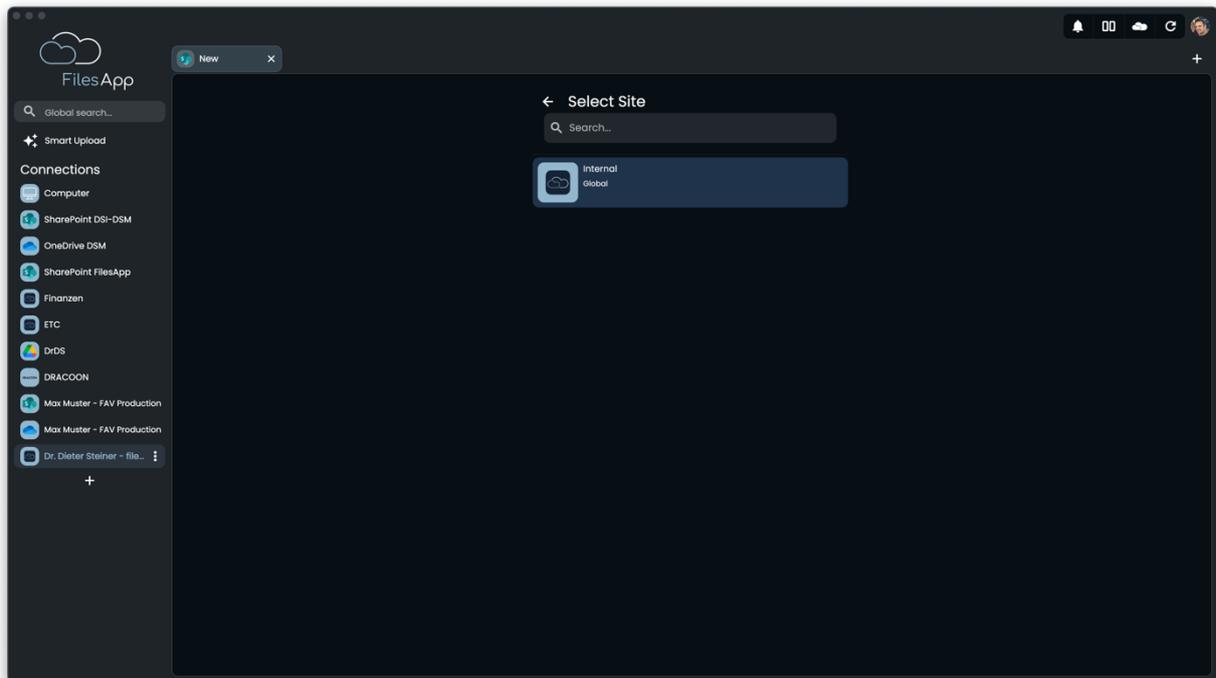
Here is an example of an invitation e-mail to an individual storage, as it is sent when a new user is created.



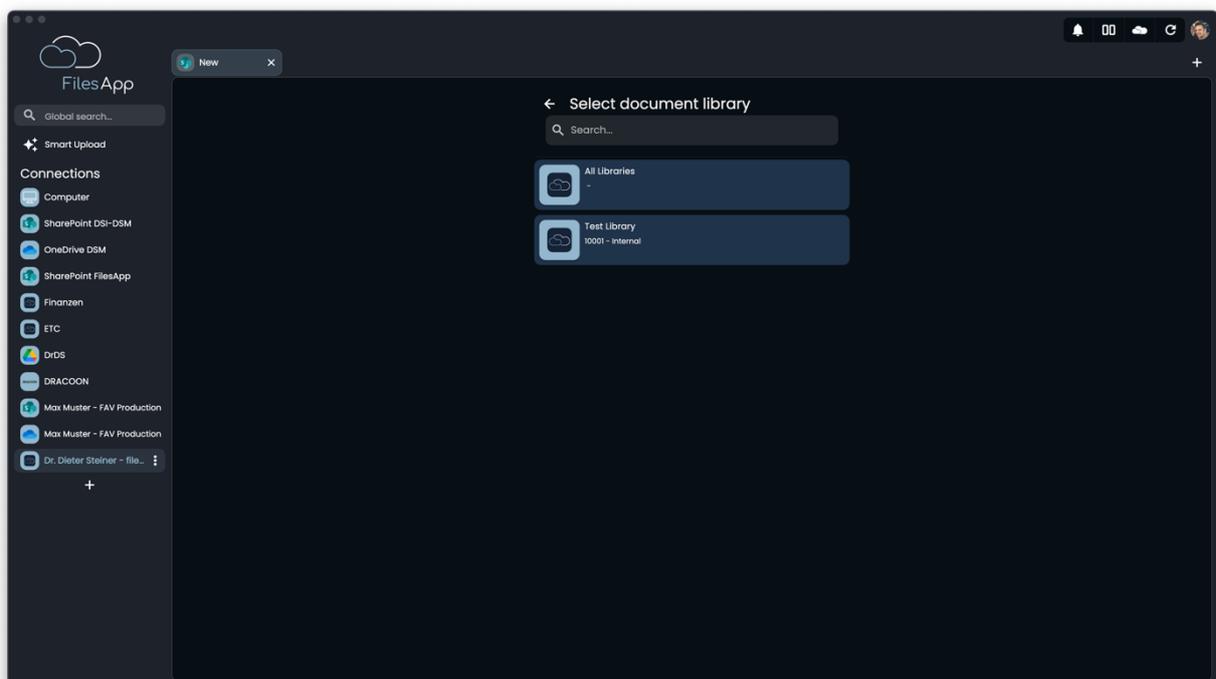
For Microsoft login, enter and authenticate the login data with the e-mail address of the user's Microsoft 365 account for the relevant Microsoft 365 tenant.



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.

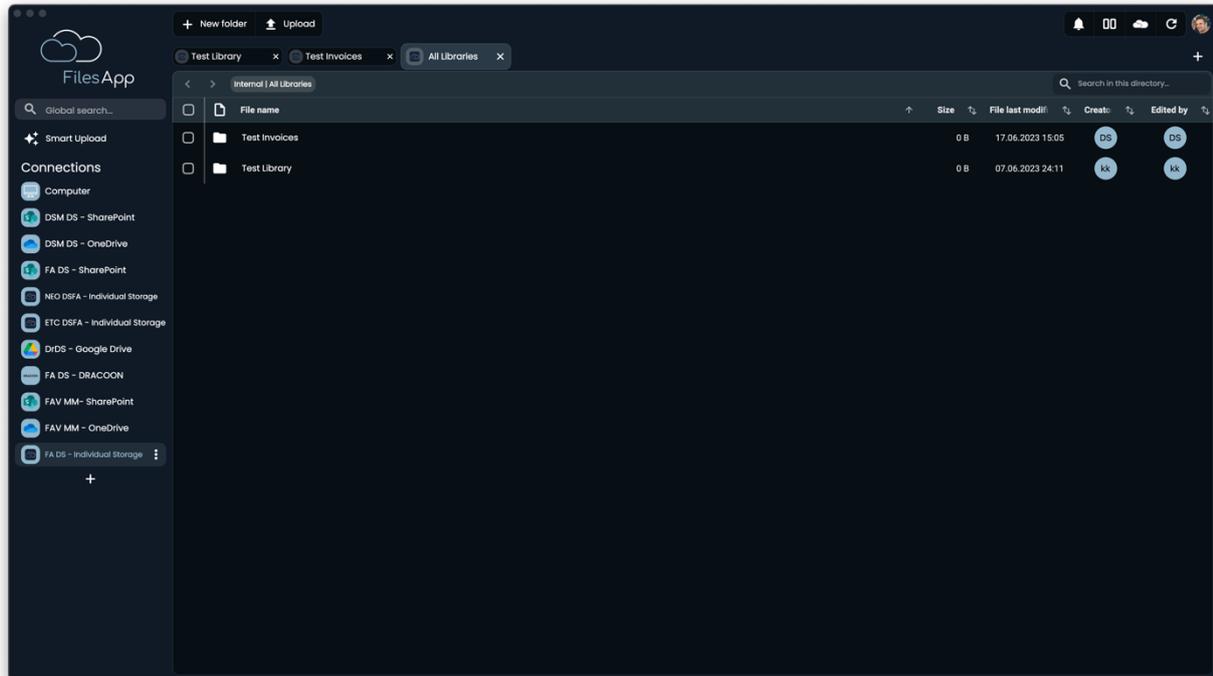


In the next step, the document library of the selected "site" will be displayed. Select the one you want here.

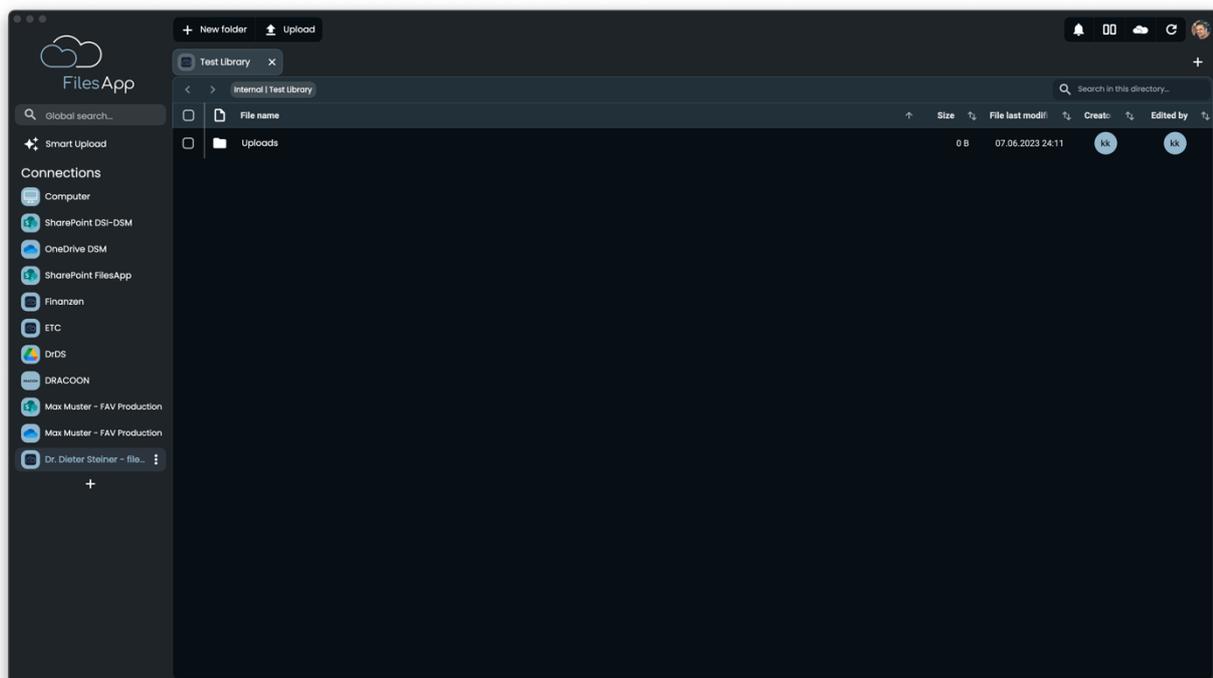
A special feature here is the document library "All Libraries".

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.

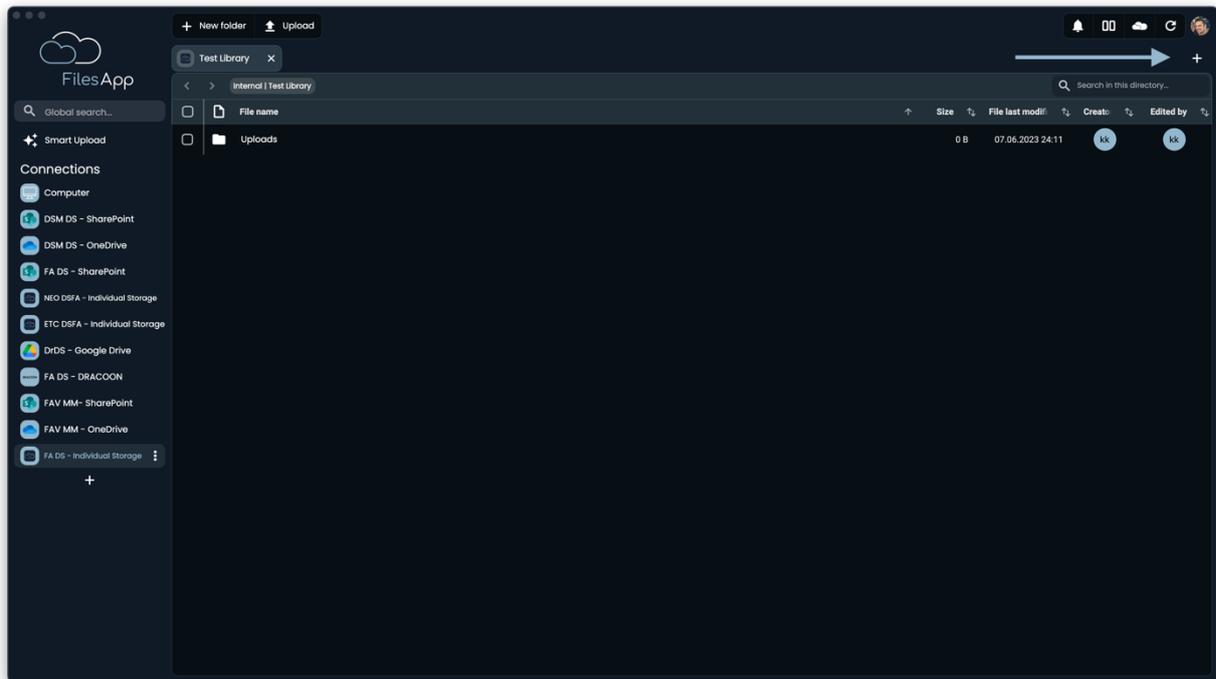


Example view when selecting "All Libraries" with access to all tenants of the Individual Storage shared with the user.

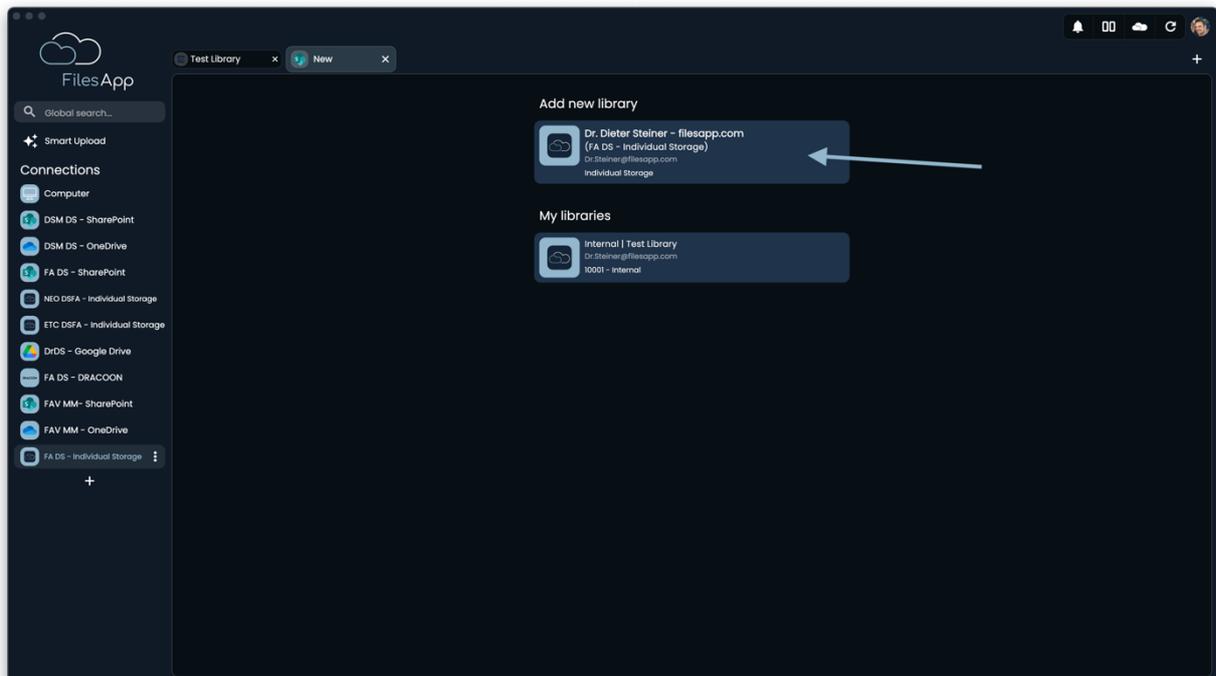


When a specific document library is selected, the directory structure of the selected document library is then available in FilesApp. The files are indexed and are also available via the search after a short time.

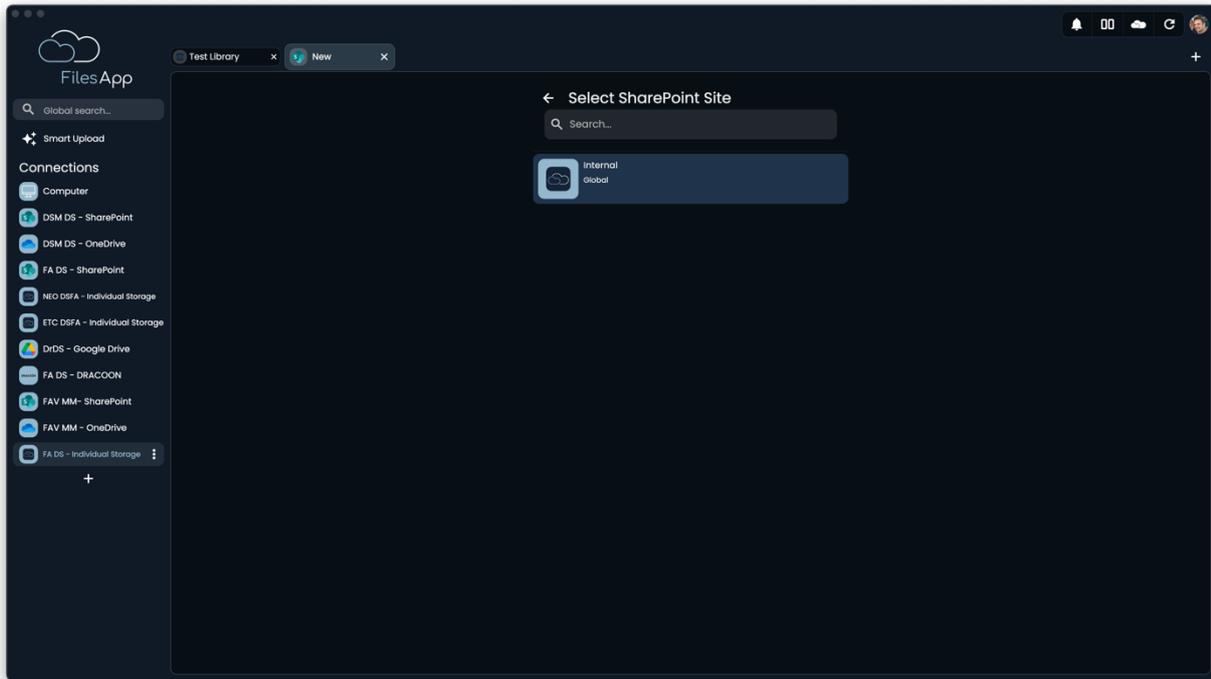
2.4.3.3.2 Setting up additional document libraries of the Connection



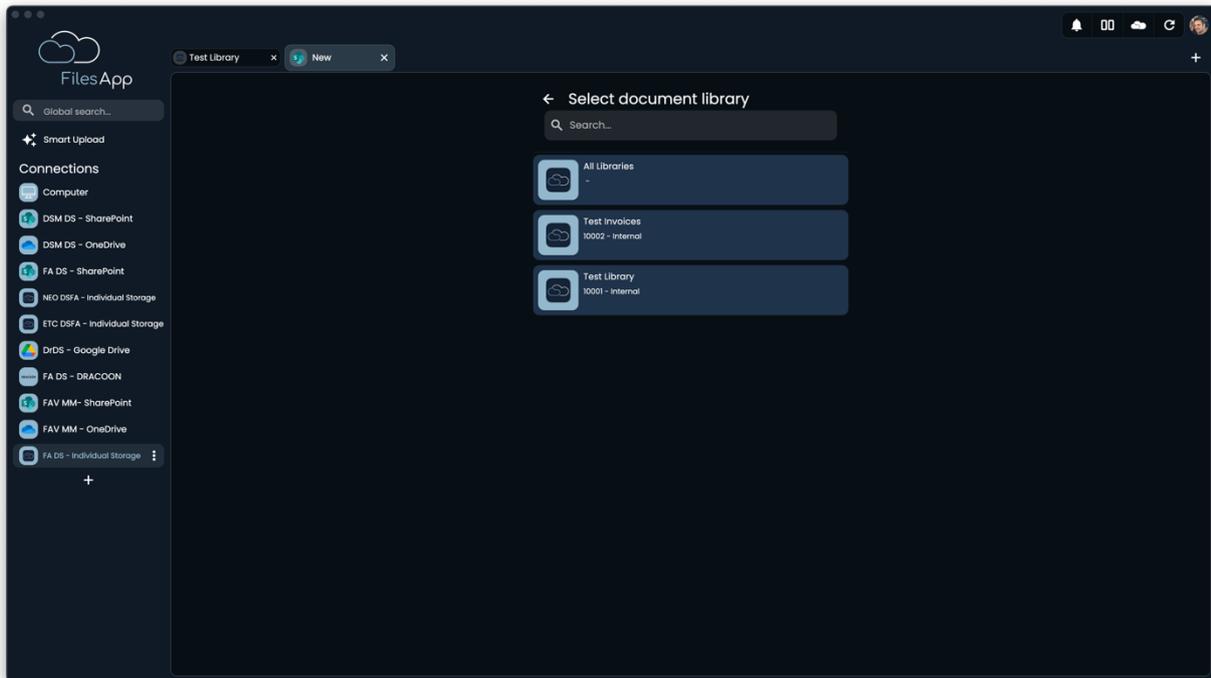
In FilesApp, select the plus sign in the upper right corner of the connection.



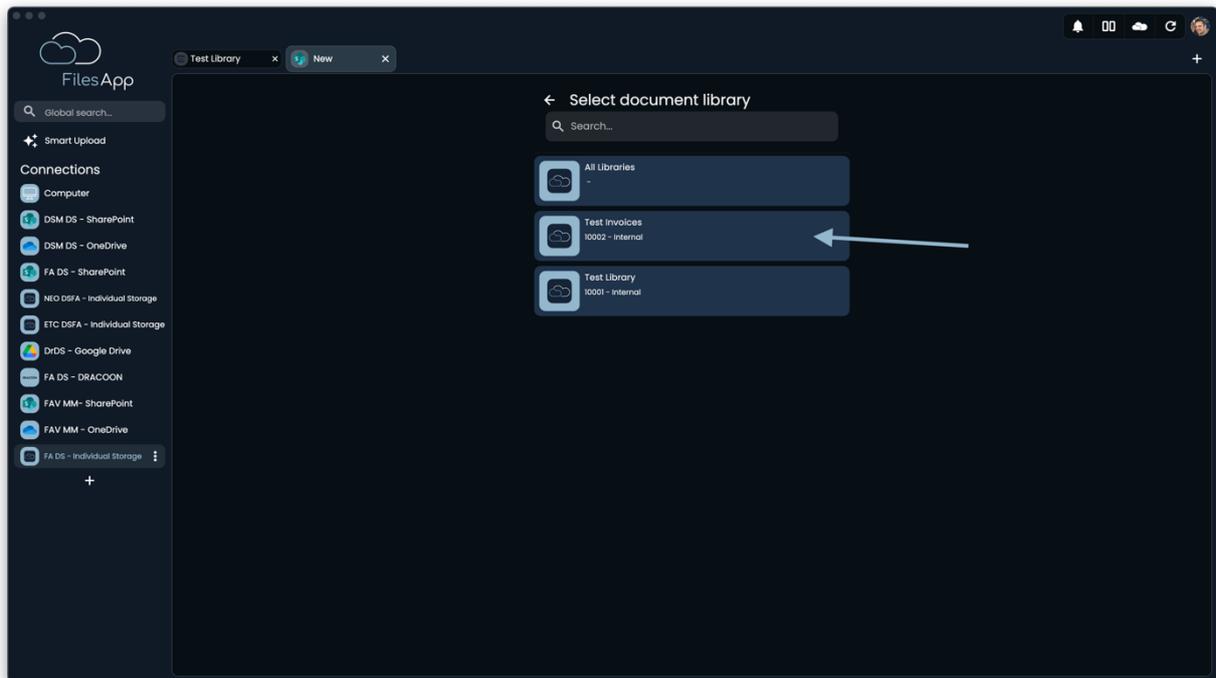
Select "Add New Library".



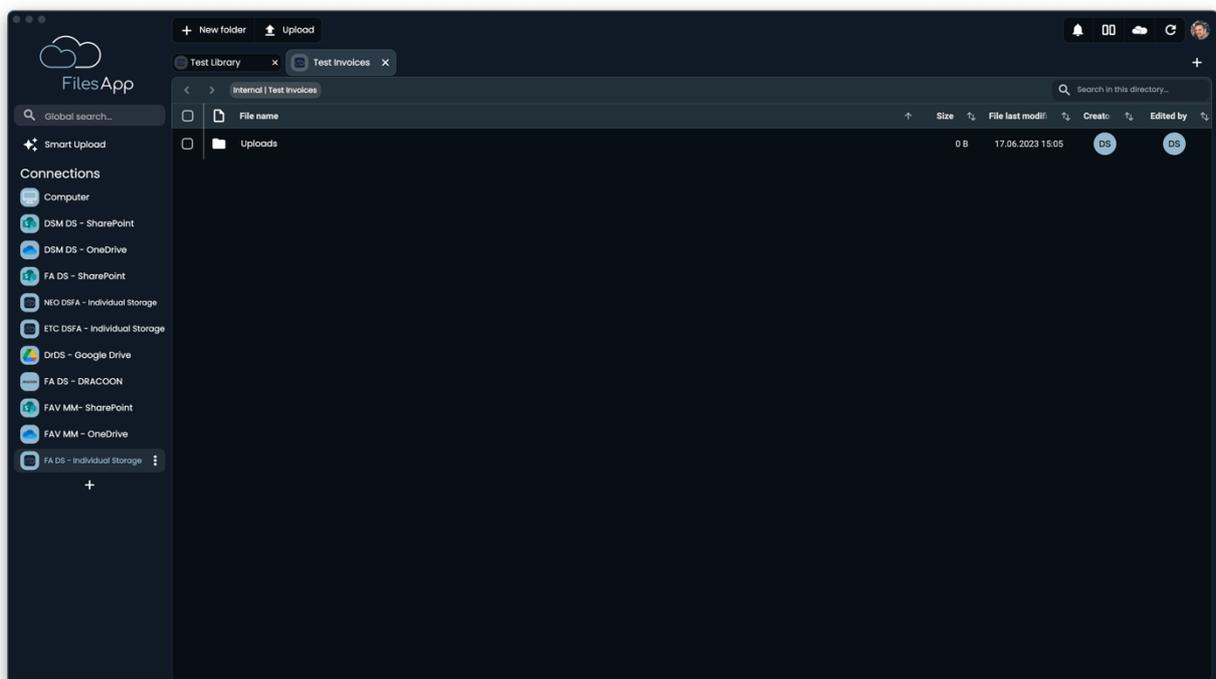
Select the desired "site" here.



The document libraries are displayed.



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



Repeat this process for all desired document libraries.

2.4.3.4 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

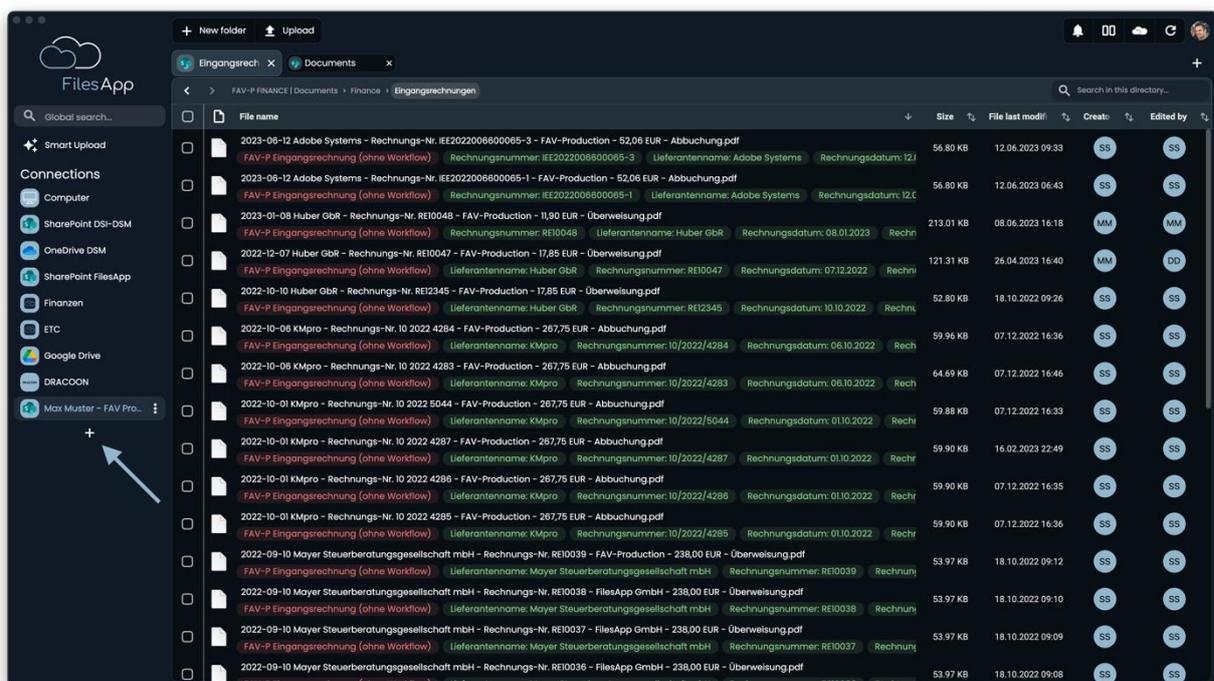
Active and existing Microsoft 365 account of the user and unlocked OneDrive app in the account.

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

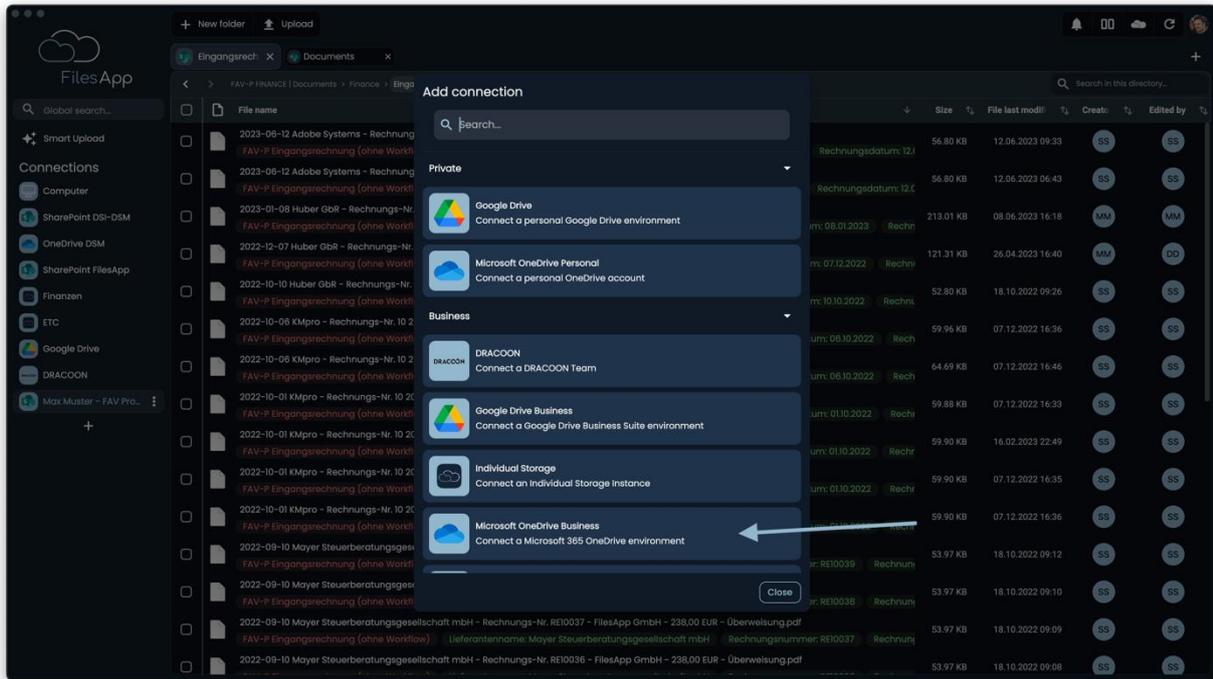
The user must have a license assigned by the administrator of the FilesApp Microsoft 365 SharePoint Connector license.

2.4.4.3 Setup

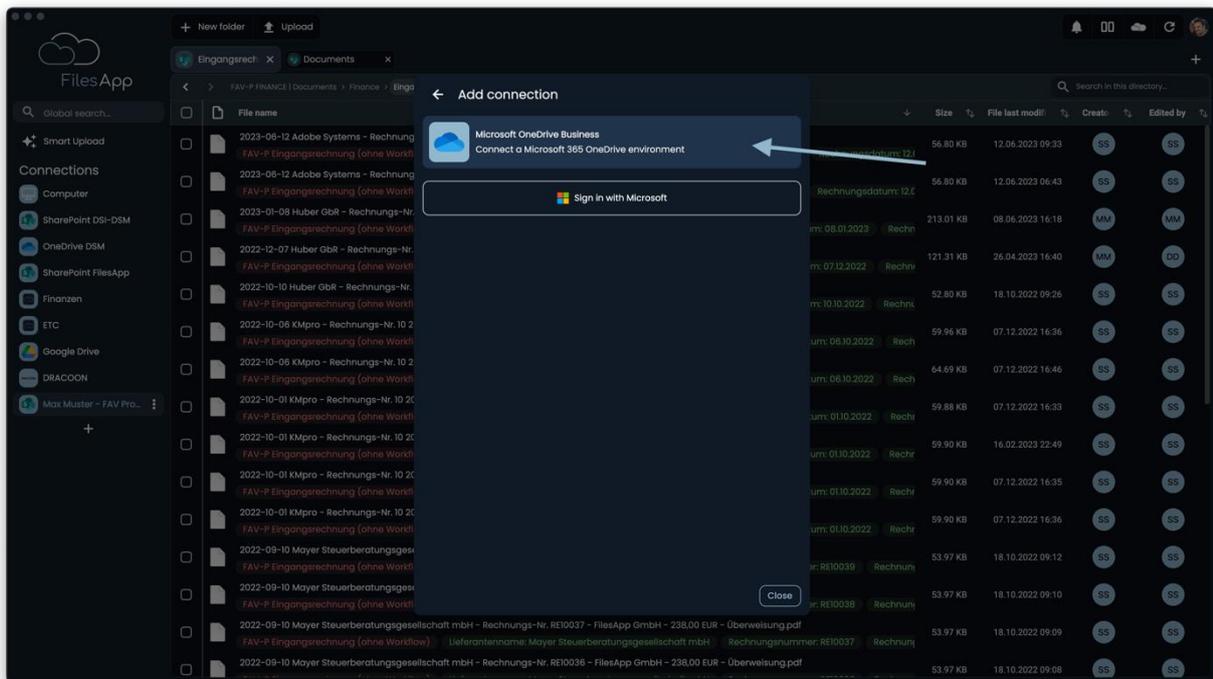
Set up a FilesApp Microsoft 365 OneDrive for Business Connection.



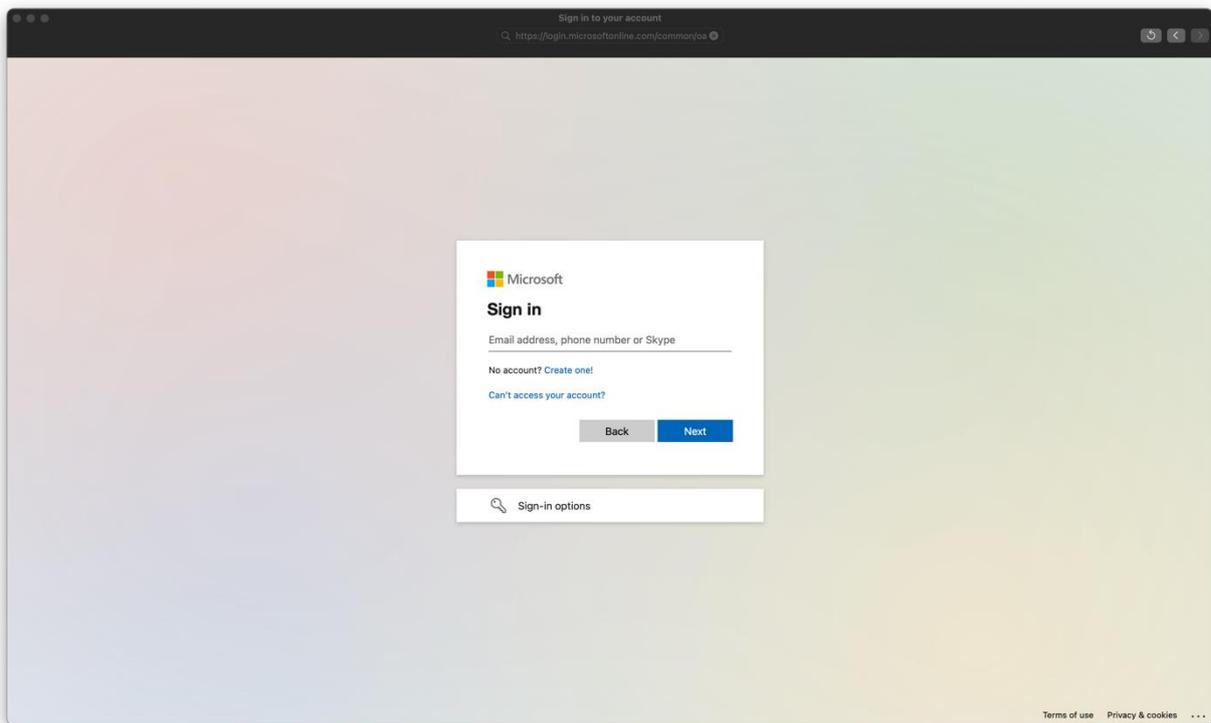
Set up a new connection to a Microsoft 365 OneDrive for Business account in FilesApp via the plus sign in the Connections.



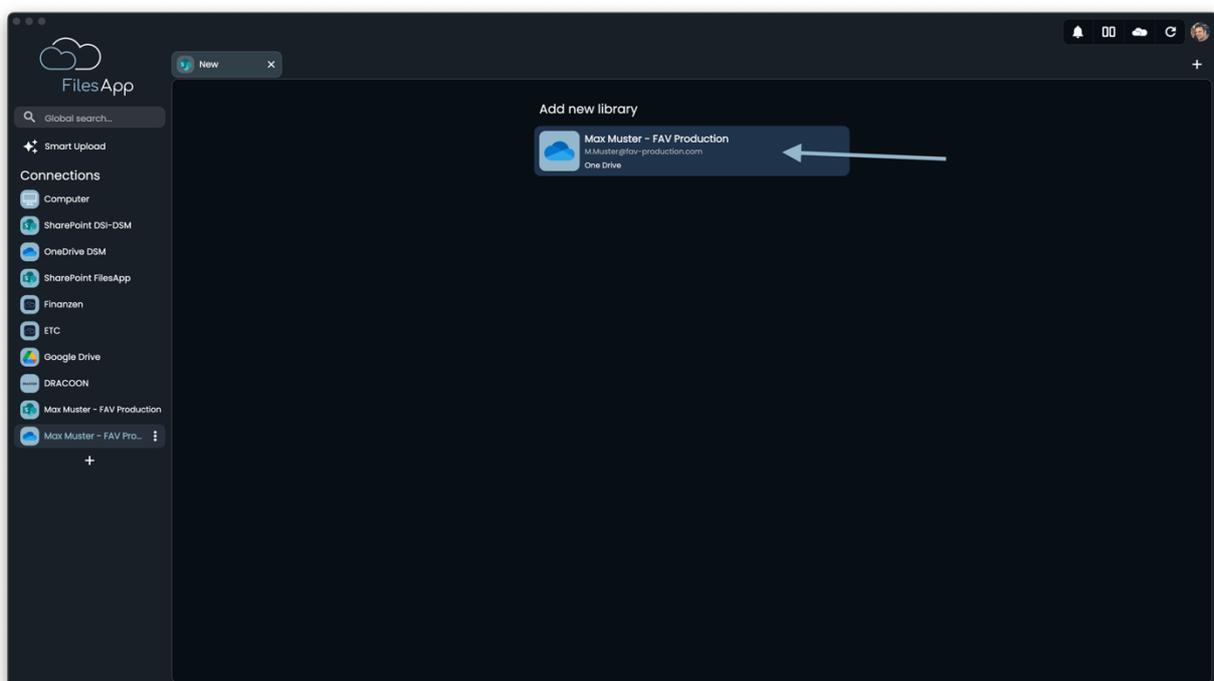
Select the Microsoft 365 OneDrive Business connection.



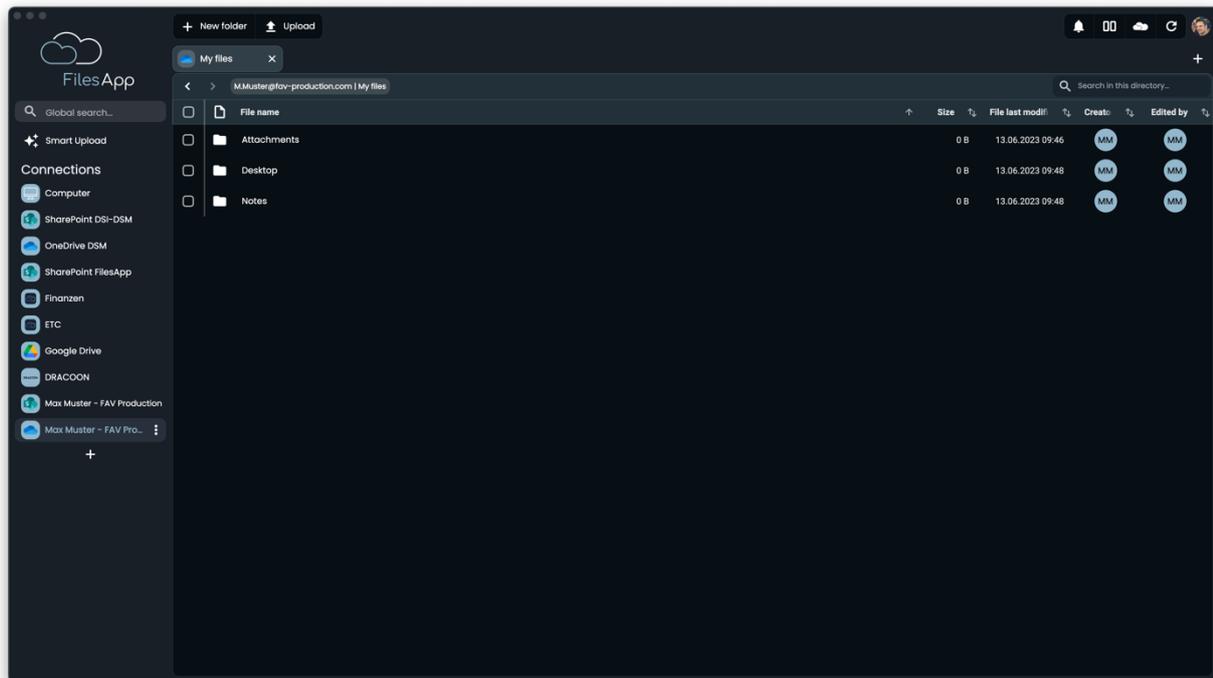
Select „Sign in with Microsoft“.



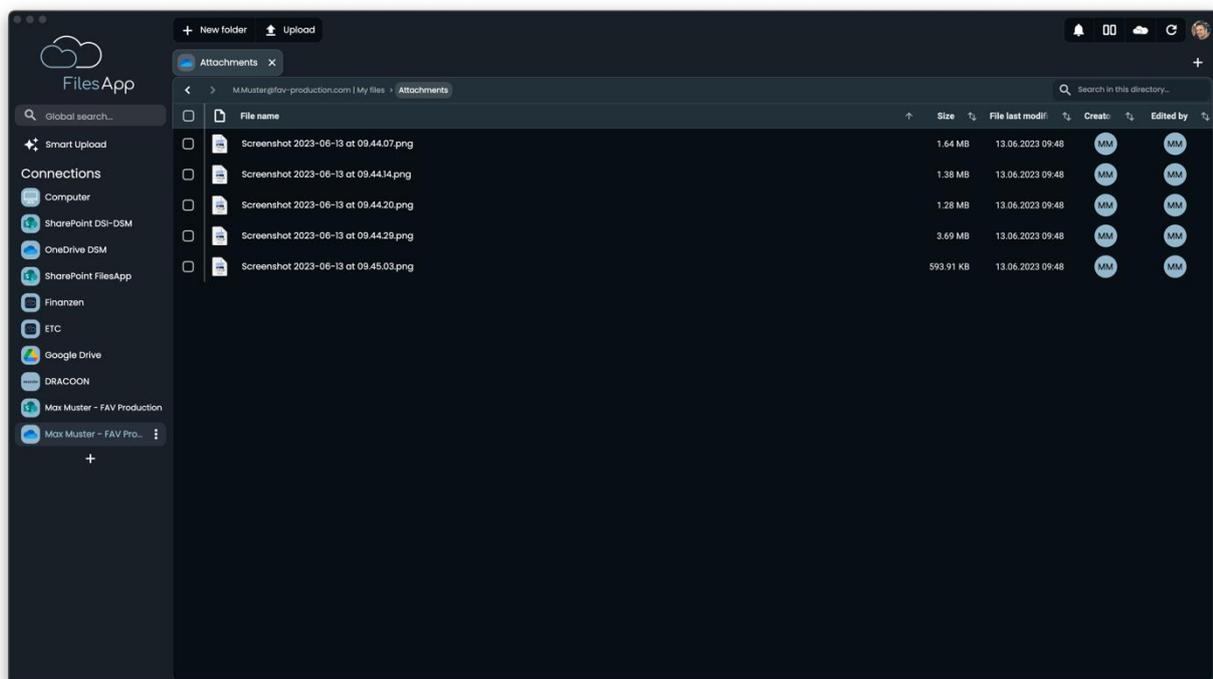
Enter and authenticate the login data with the email address of the user's Microsoft 365 account for the relevant Microsoft 365 tenant.



After successful authentication, the 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.



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.

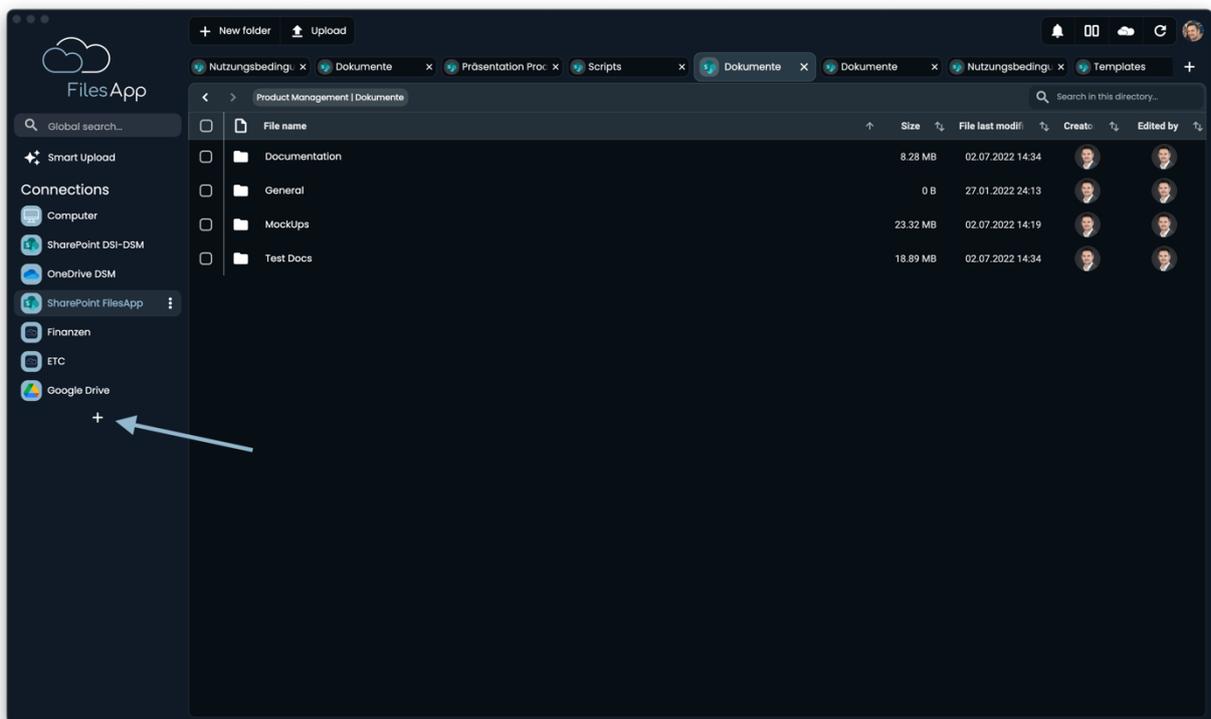
Active and existing FilesApp Microsoft 365 SharePoint Connector license - see <https://filesapp.com/pricing/>

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

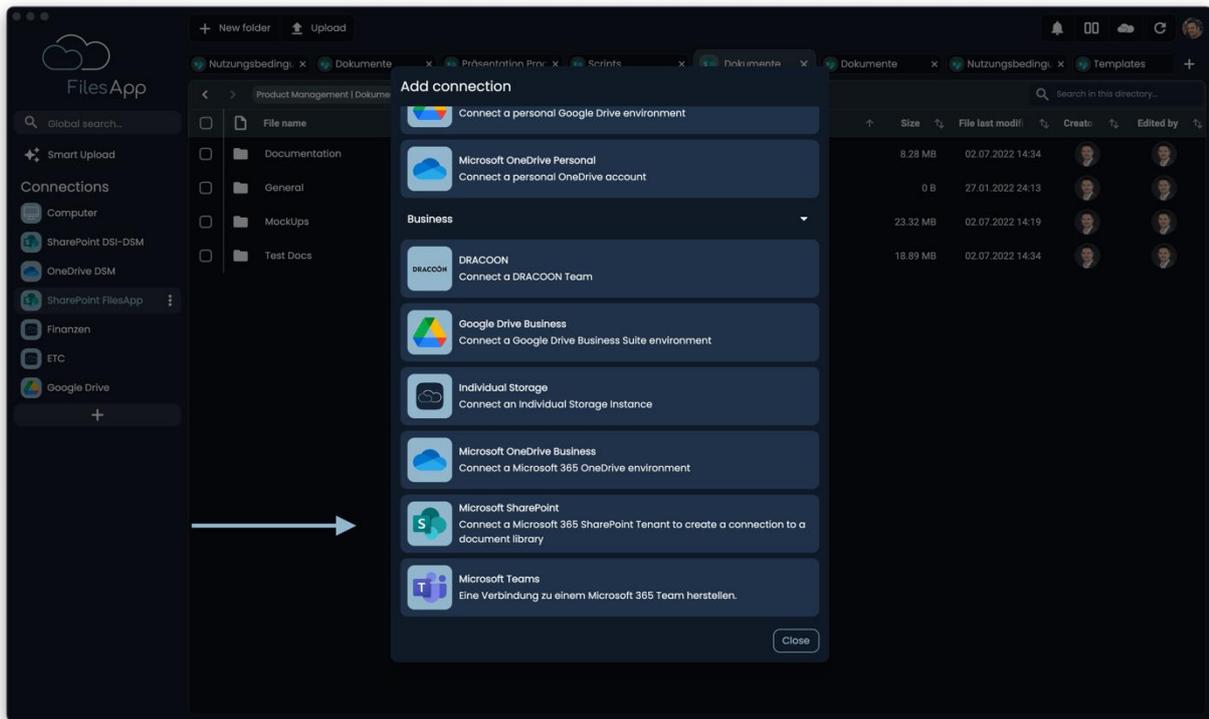
2.4.5.3 Setup

Setting up a FilesApp Microsoft 365 SharePoint Connection.

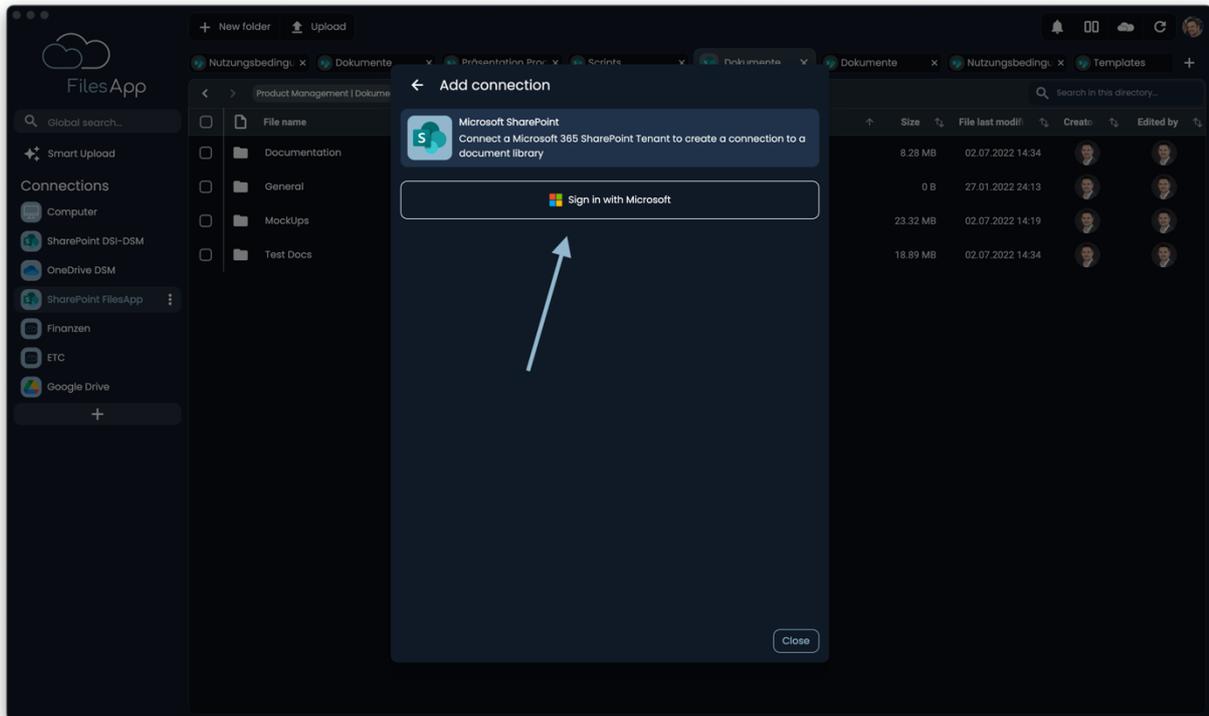
2.4.5.3.1 Setting up the first document library of the Connection



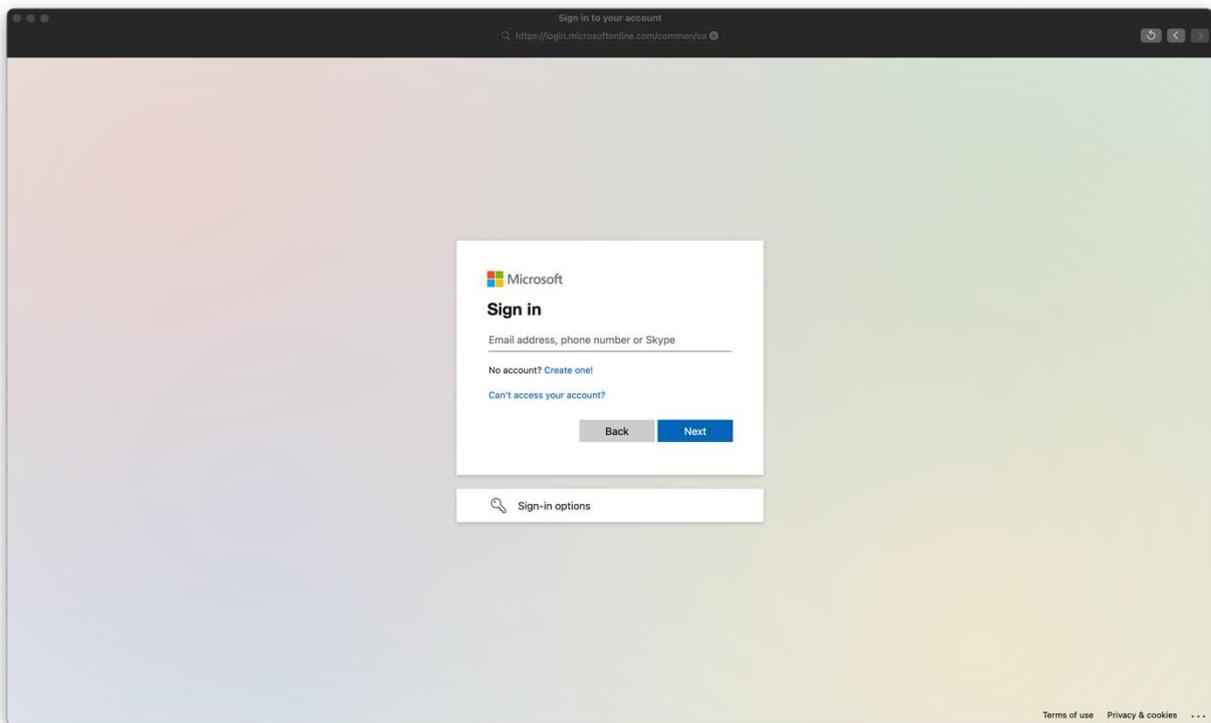
In FilesApp, set up a new connection to a Microsoft 365 SharePoint tenant via the plus sign in the Connections.



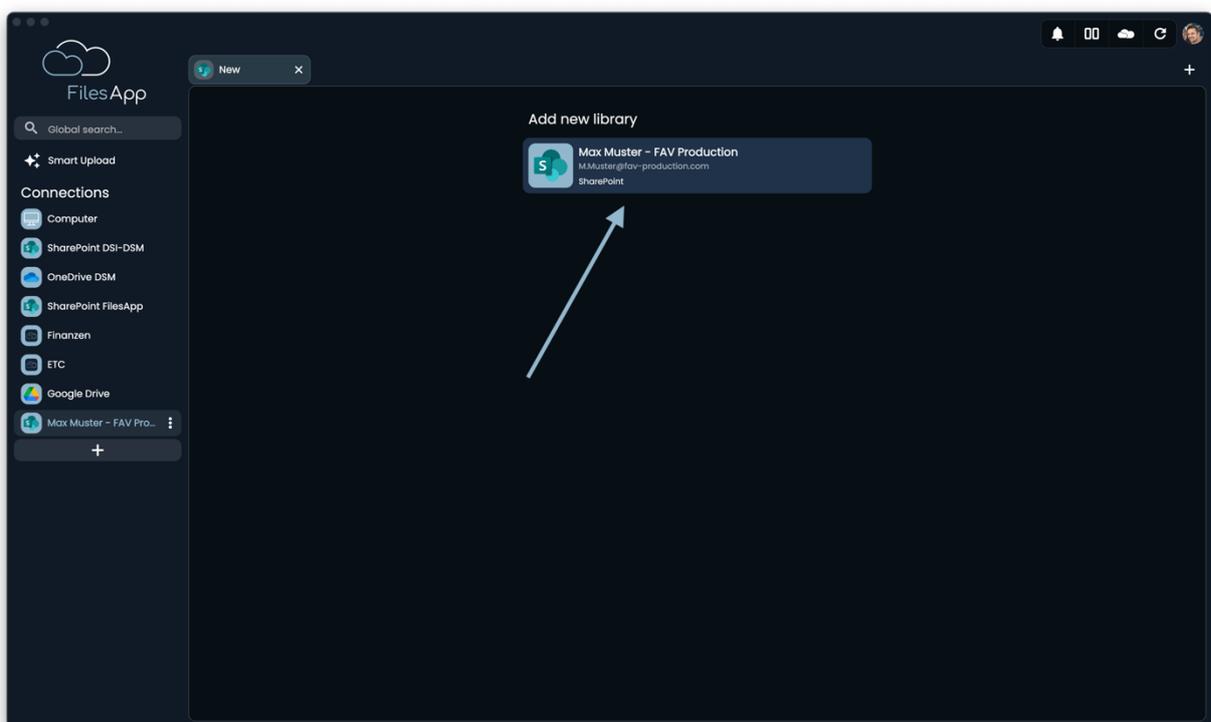
Select Microsoft SharePoint connection.



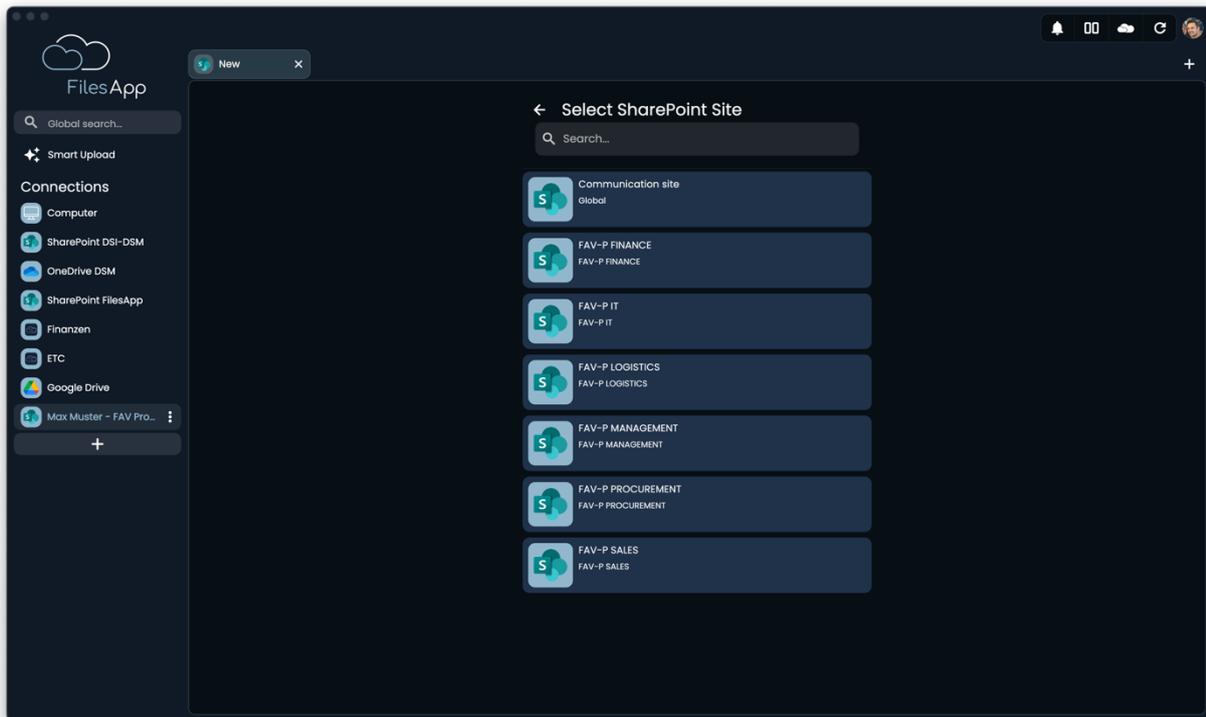
Select „Sign in with Microsoft“.



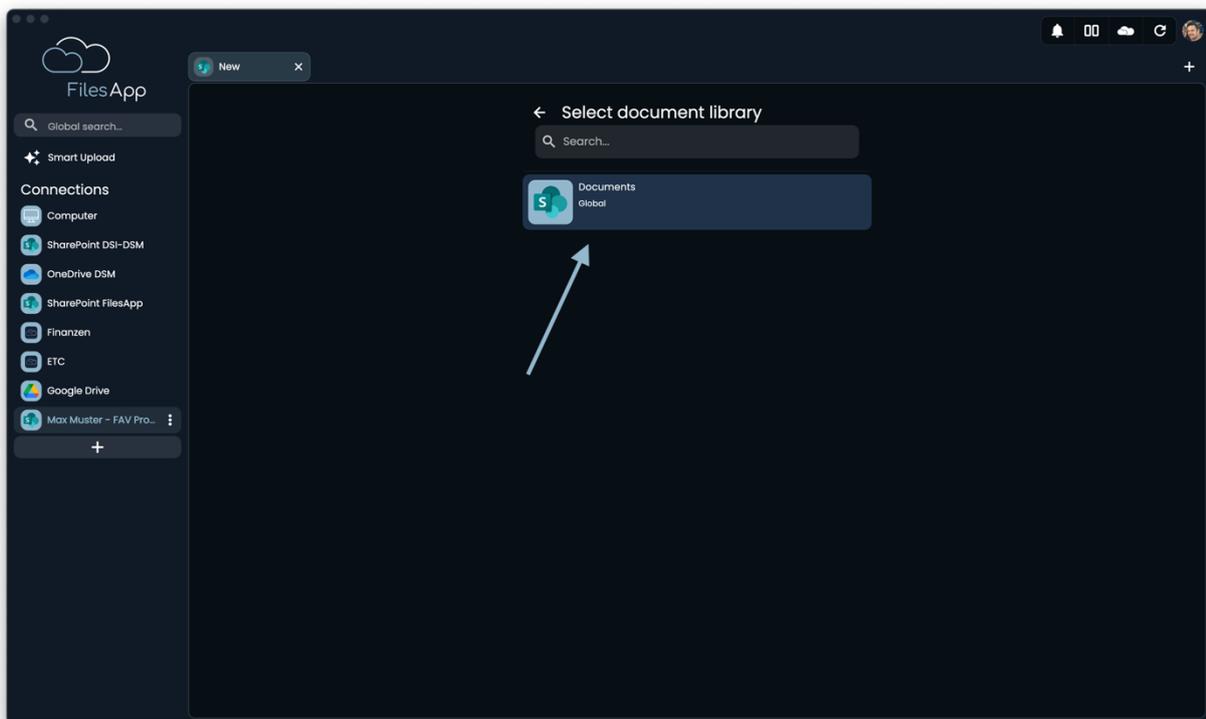
Enter and authenticate the login data with the email address of the user's Microsoft 365 account for the relevant Microsoft 365 tenant.



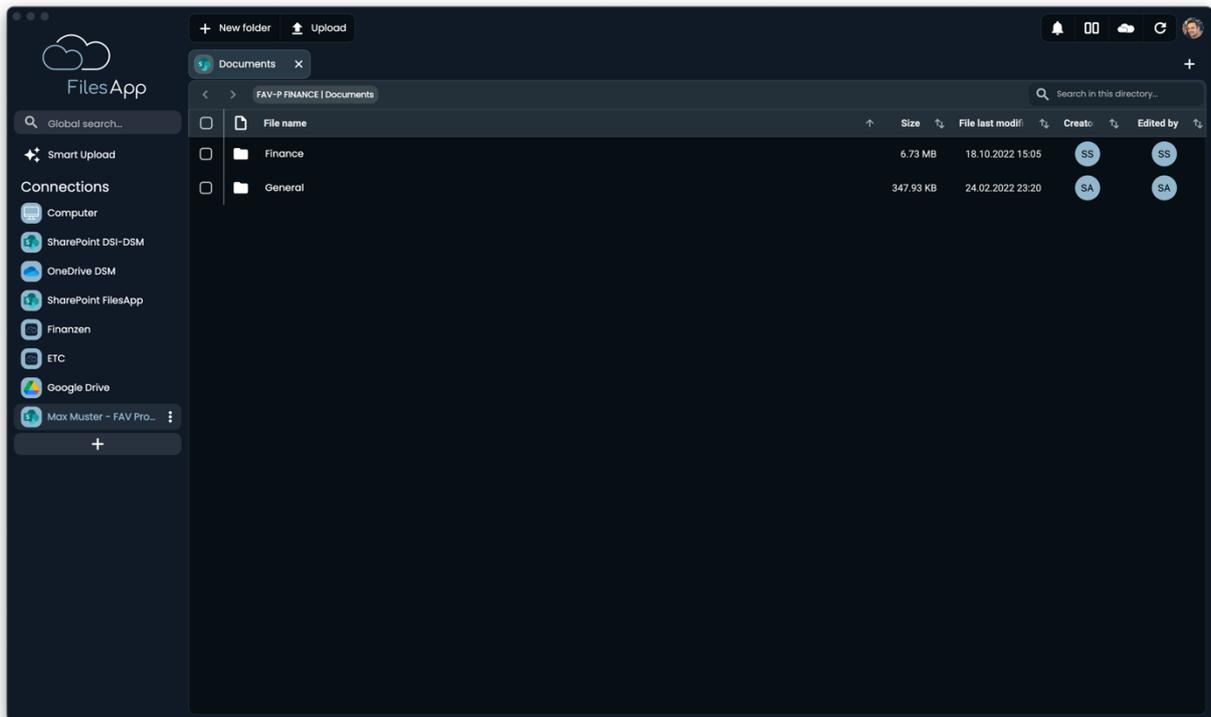
After successful authentication, the document library of the Microsoft 365 tenant is displayed in FilesApp. Select it.



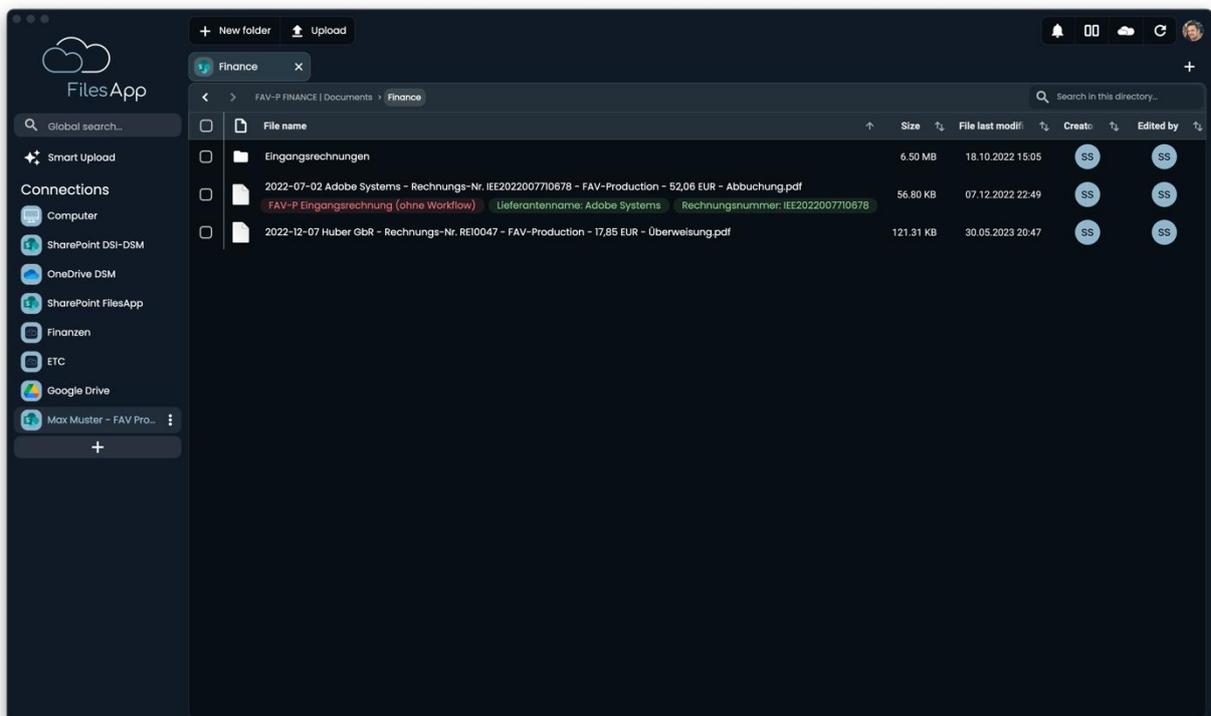
The "sites" available to this user due to user rights in the Microsoft 365 environment are listed. Select the desired "site" here.



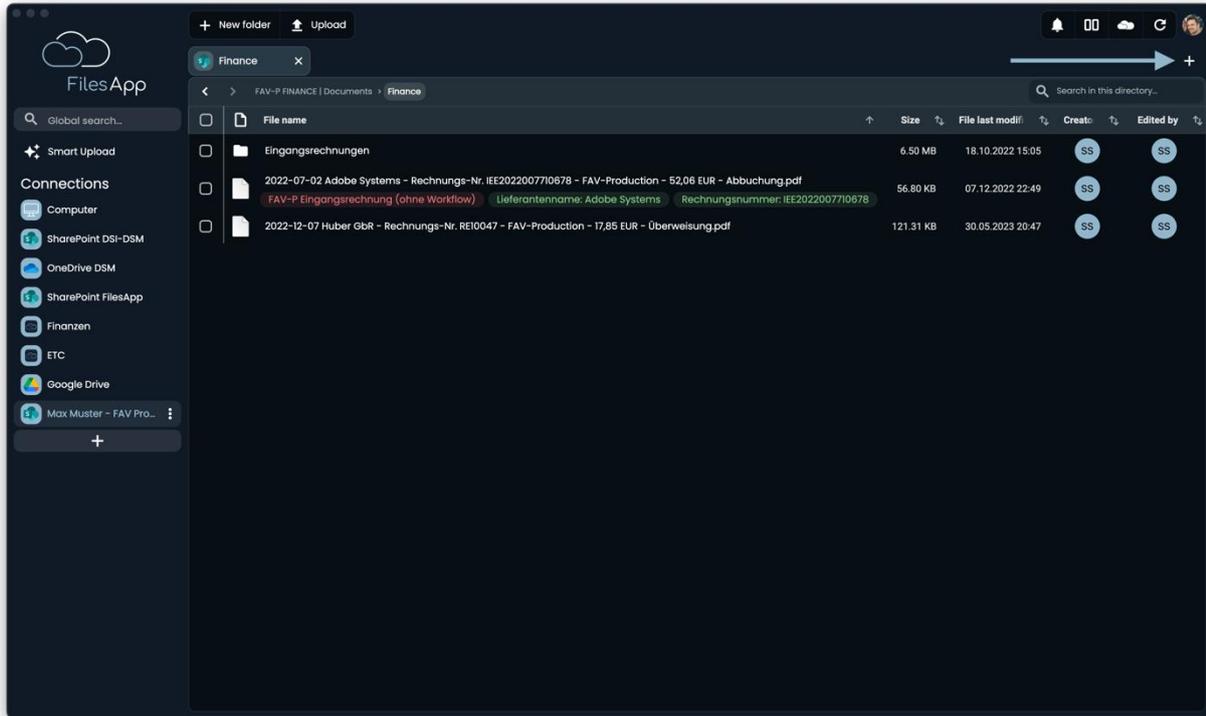
In the next step, the document library of the selected "site" will be displayed. Select it.



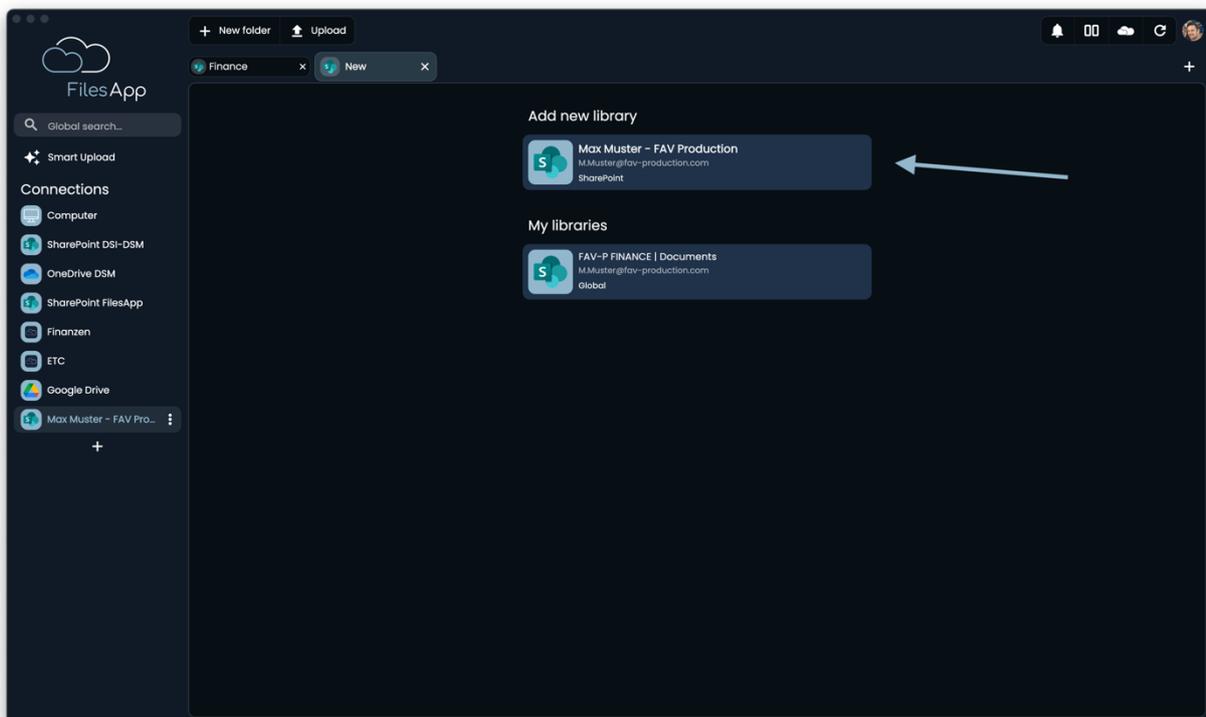
The directory structure of the selected document library is then available in FilesApp. The files are indexed and are also available via the search after a short time.



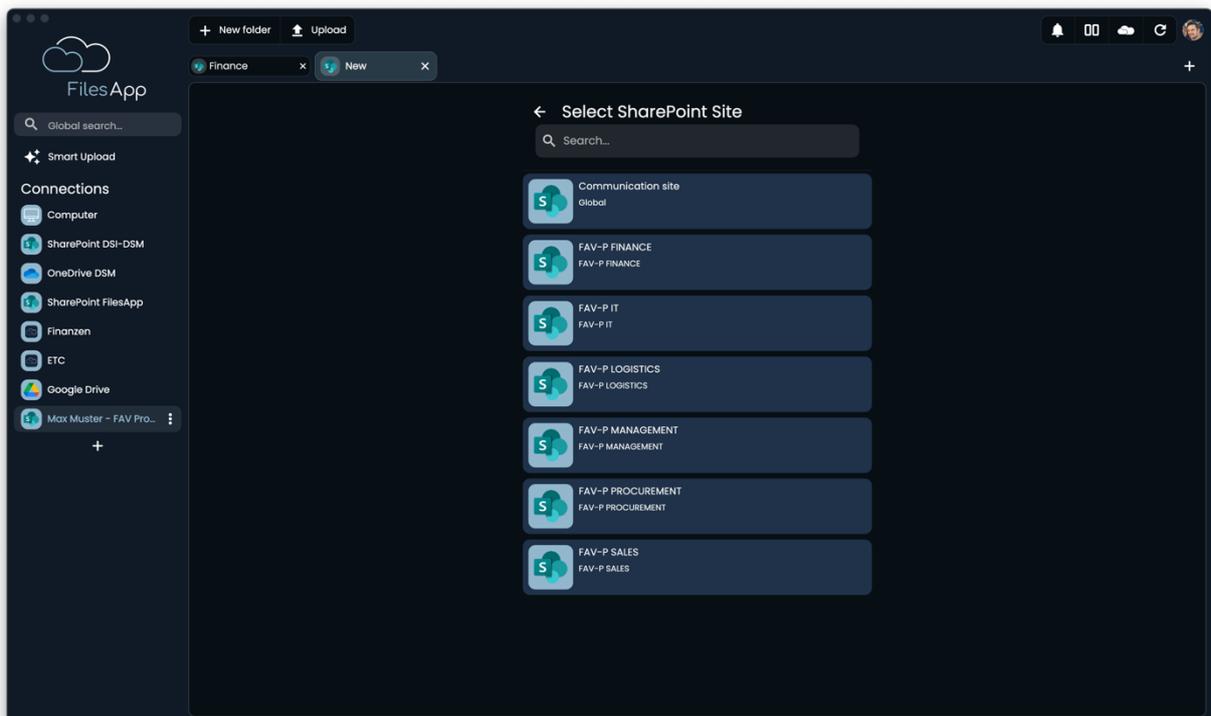
2.4.5.3.2 Setting up additional document libraries of the Connection



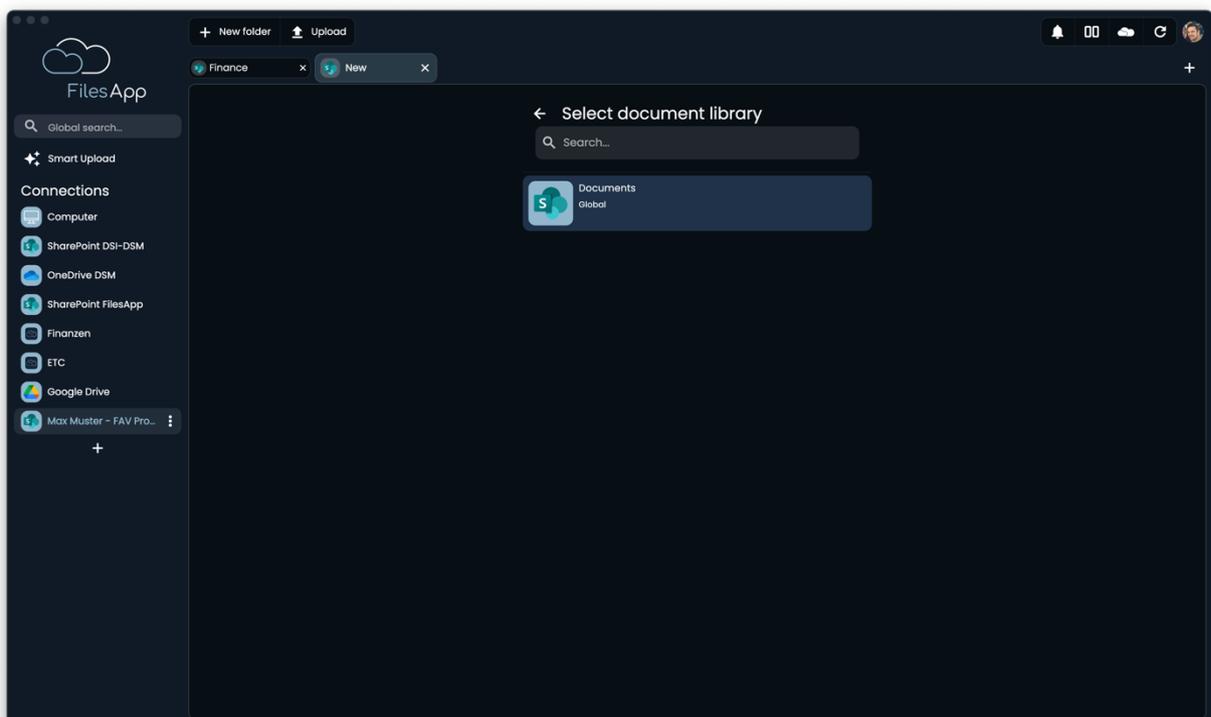
In FilesApp, select the plus sign in the upper right corner of the connection.



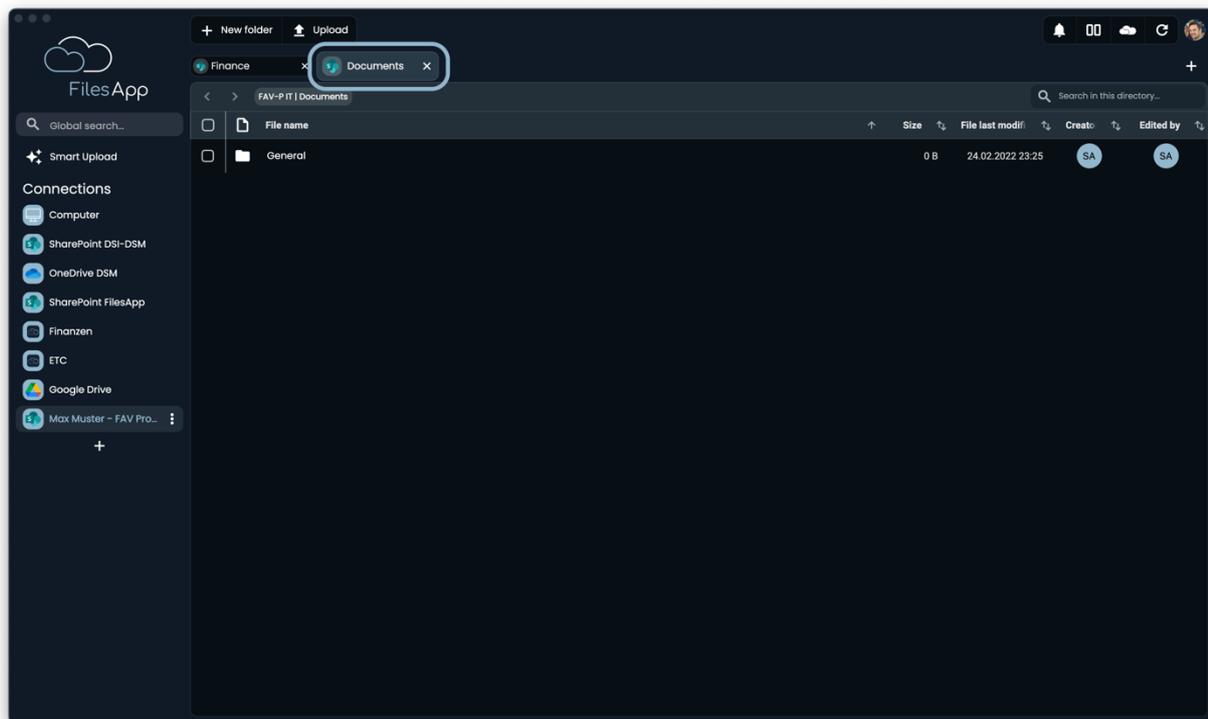
Select "Add New Library".



Select the desired "site" here.



The document library is displayed.



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.

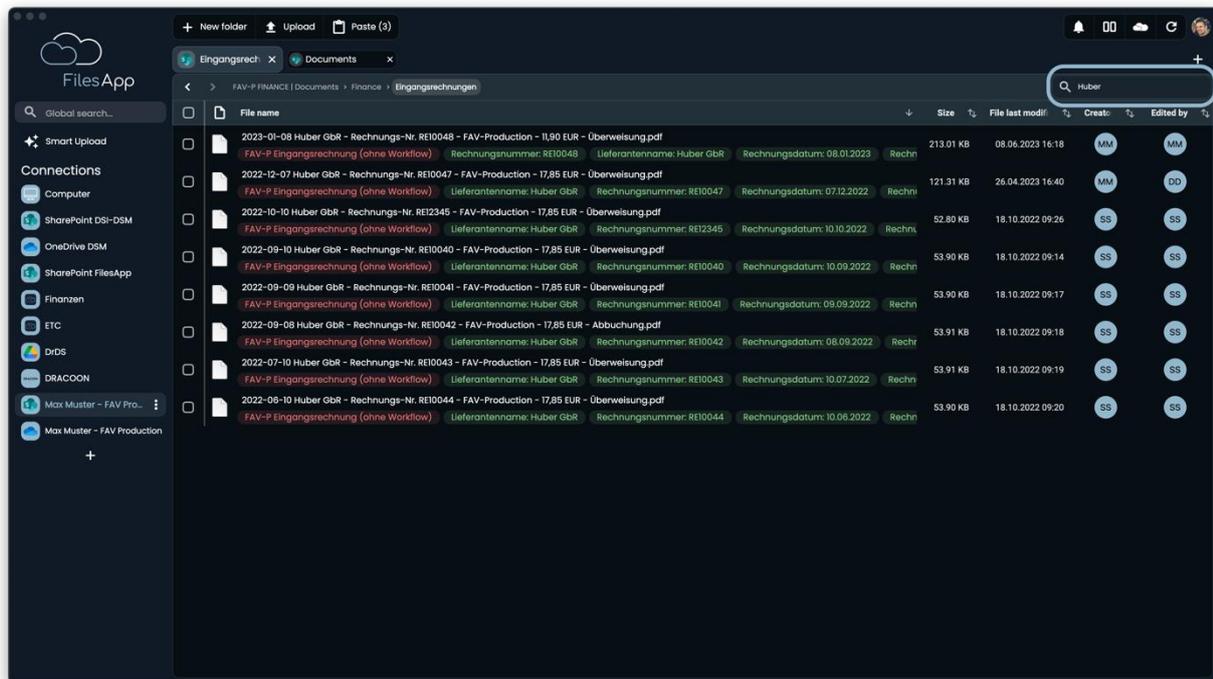
3 Search

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

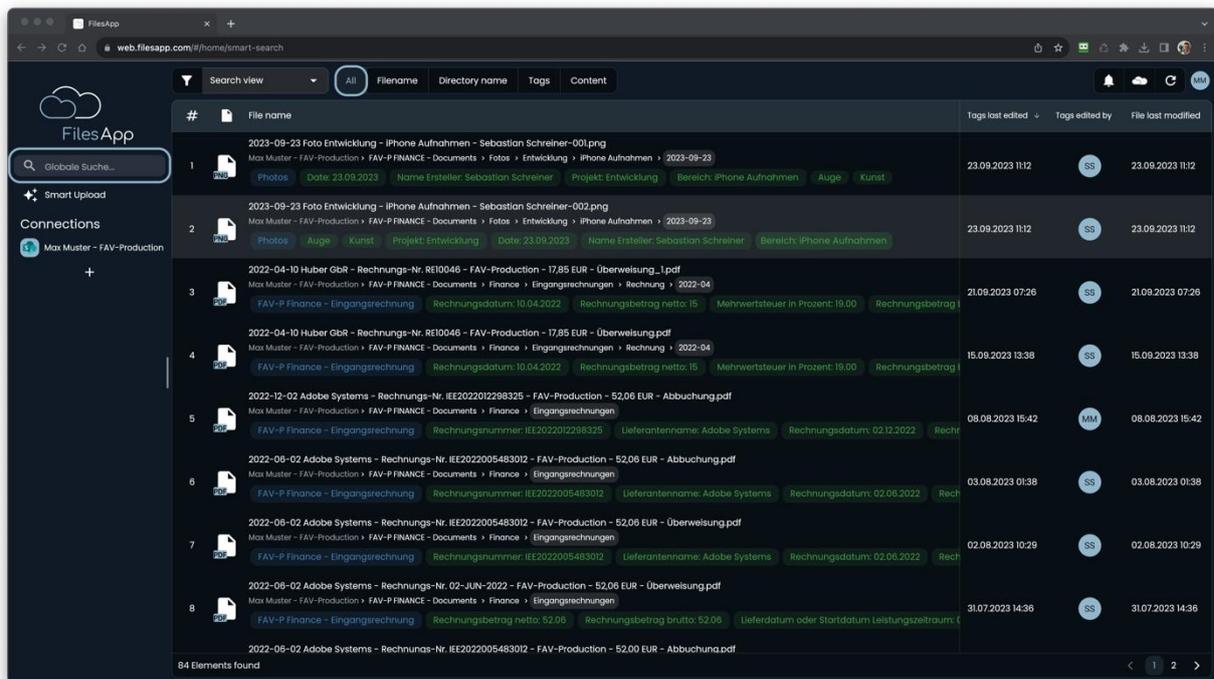
If the user only wants a simple search for file names in the current directory, this can be executed in the search field.



3.3 Globale Suche

3.3.1 Search in general

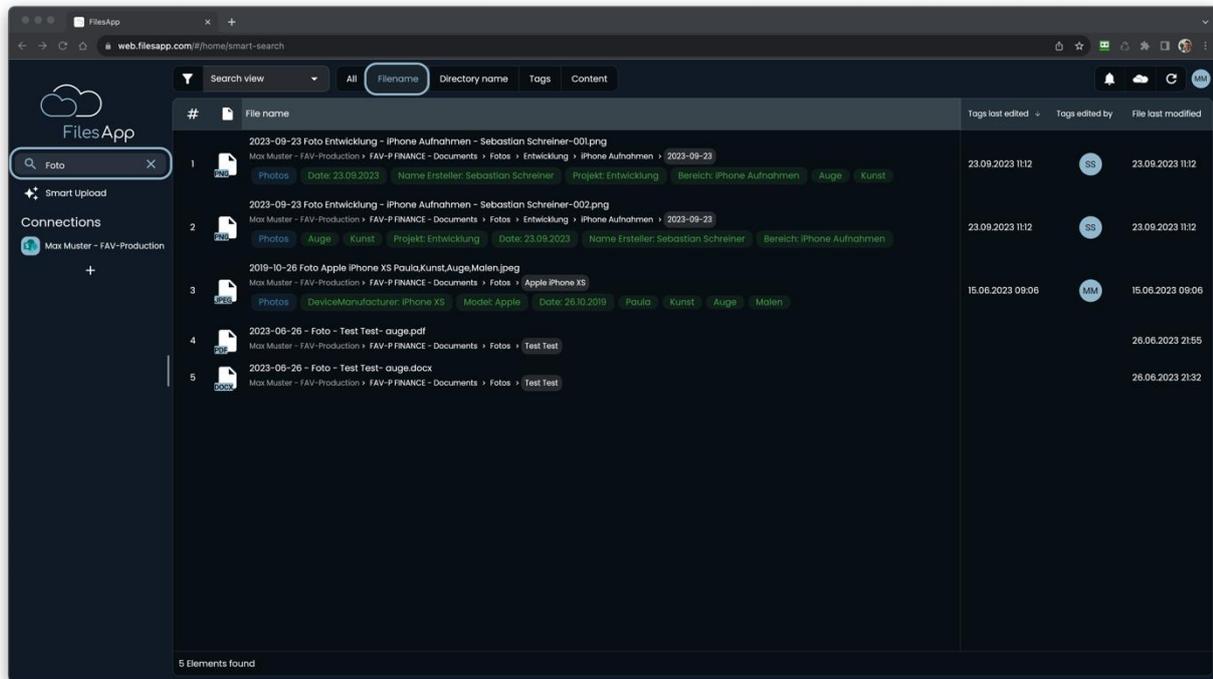
If the Global Search is selected by clicking/typing in the corresponding field, "All" files will be displayed first.



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.

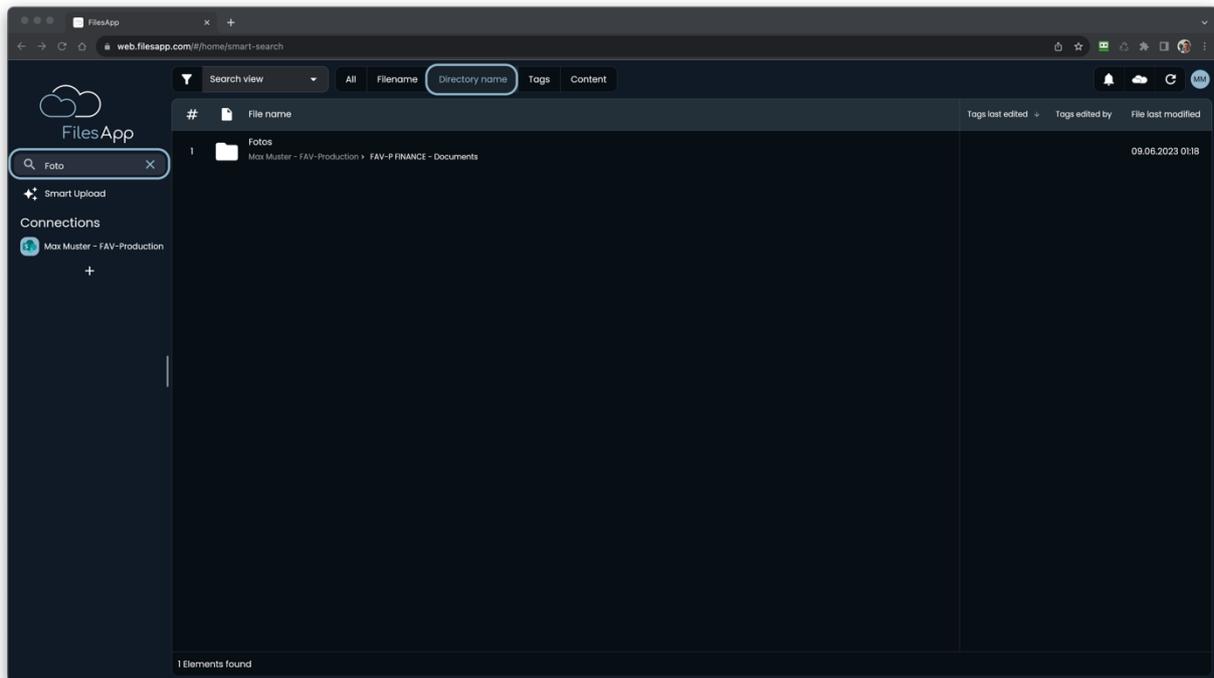
3.3.2 Search in file names

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



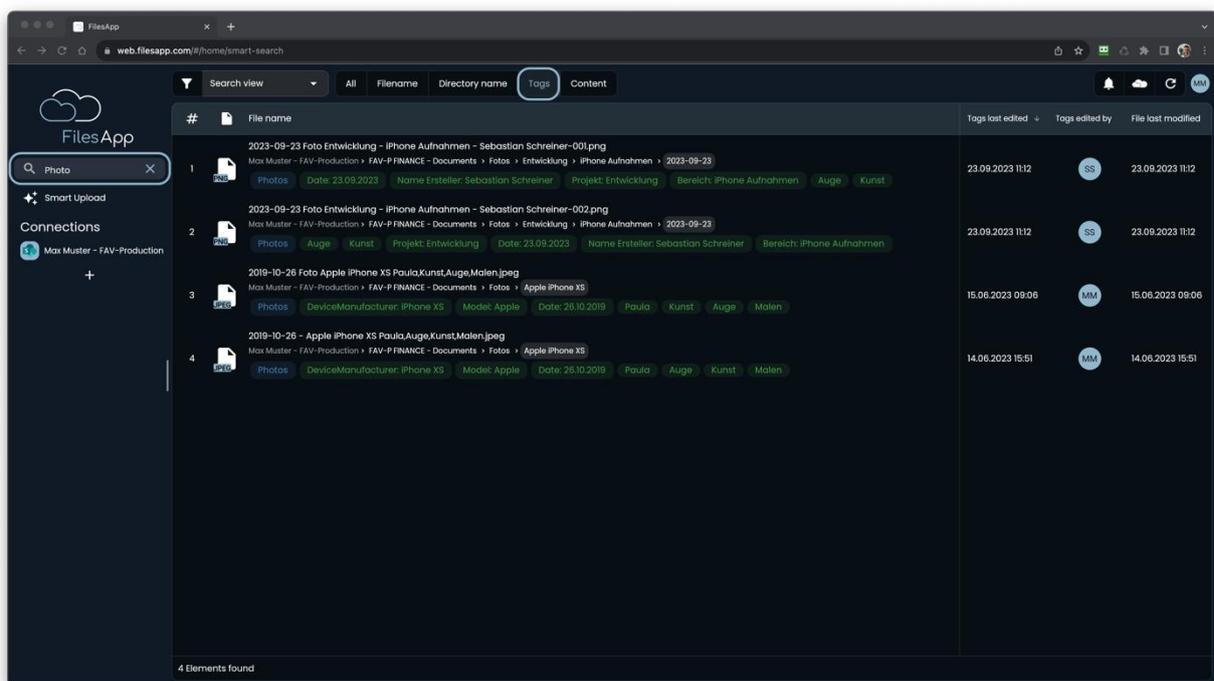
3.3.3 Search in directory names

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

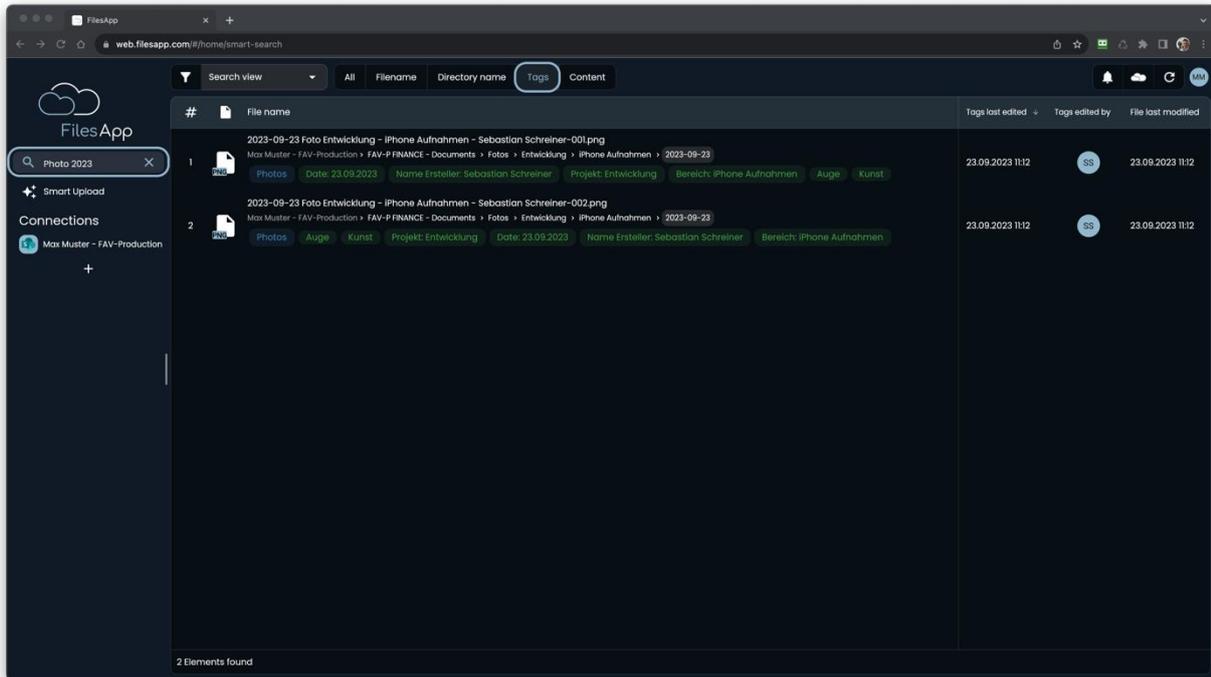


3.3.4 Search in Tags

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.

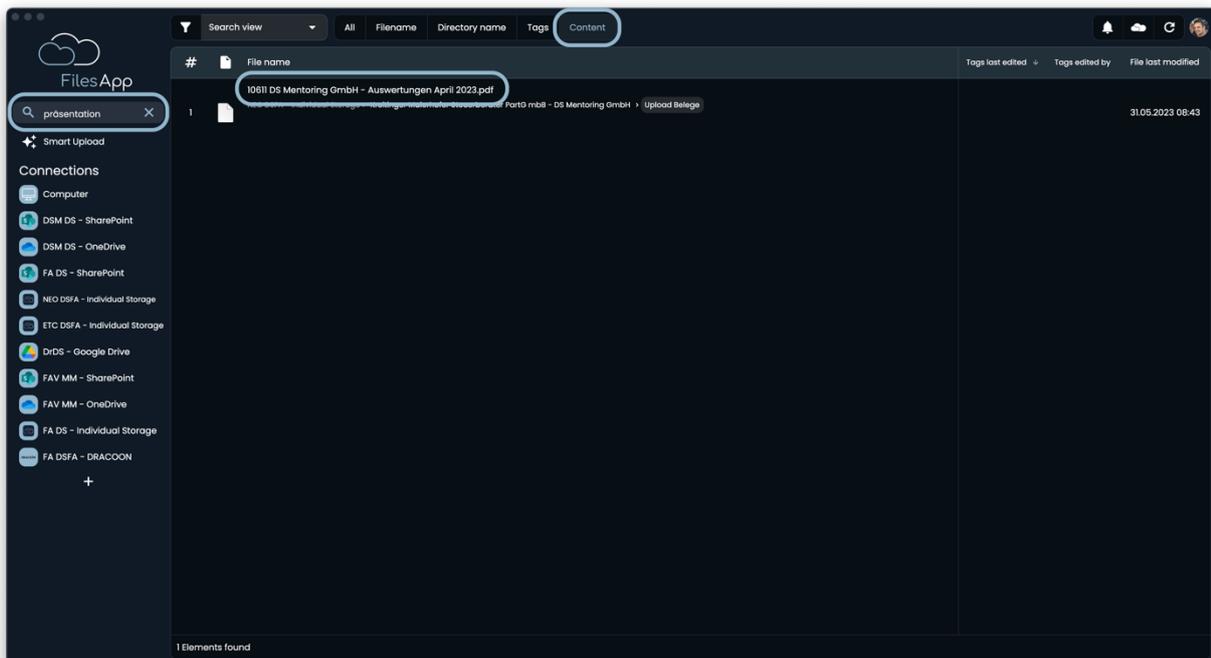


By entering more strings, a search can become more and more detailed.



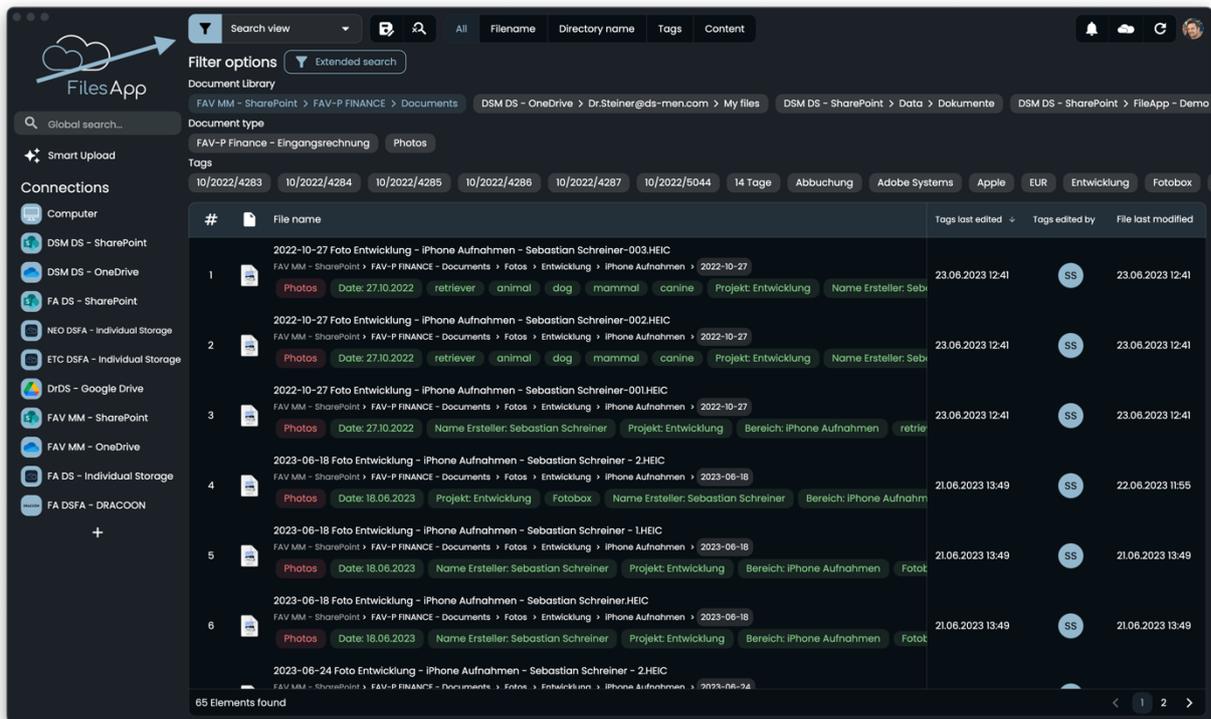
3.3.5 Search in file contents

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

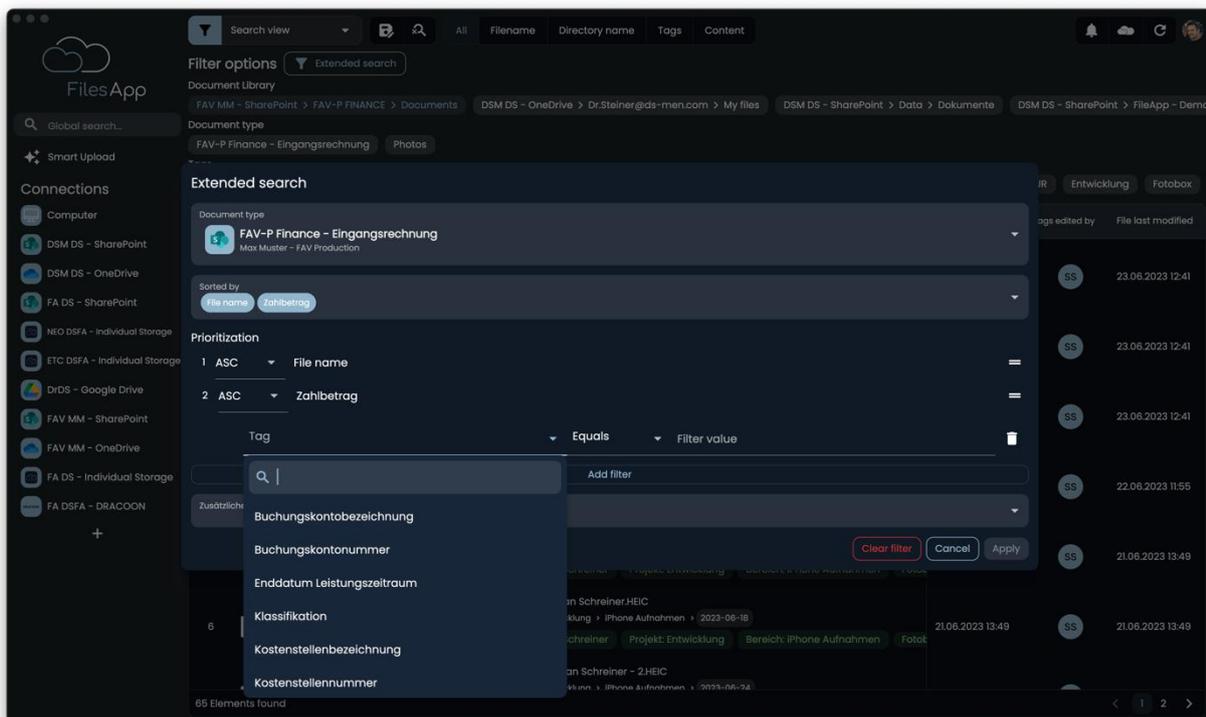
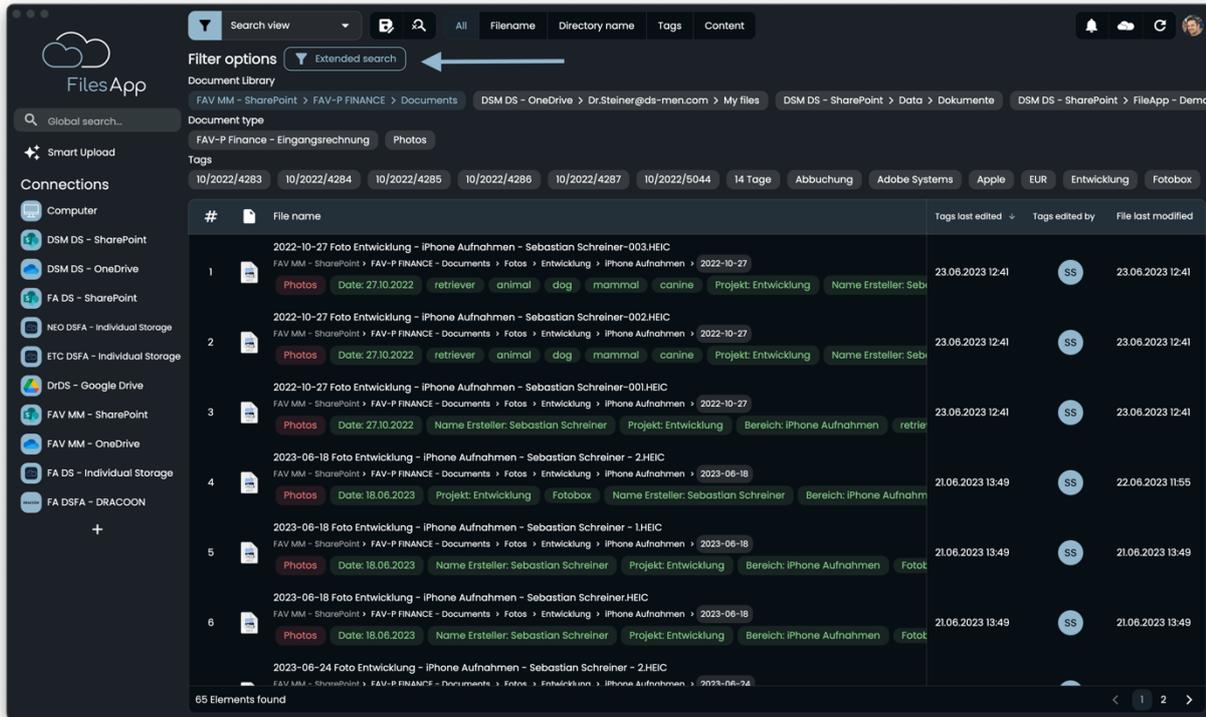
The filter button provides further options for refining the search.



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.



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.

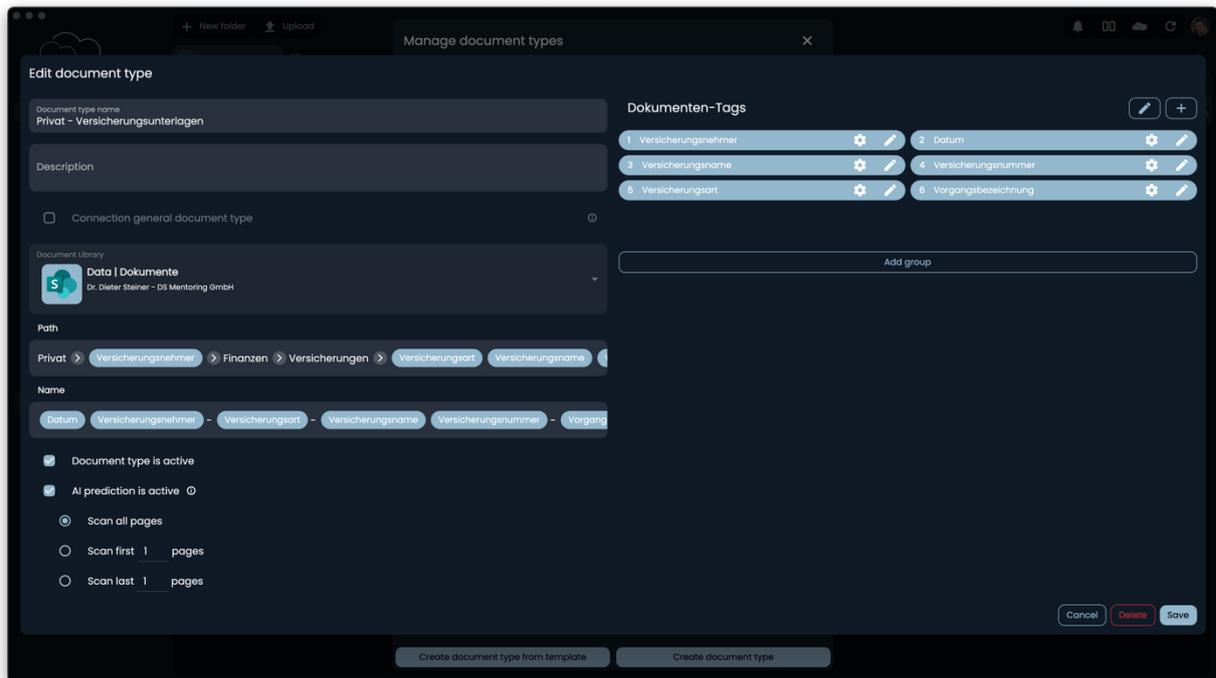
To be able to create a document type, the user needs the necessary rights in the document library that is to be used with the document type to store these files. In the case of Microsoft SharePoint, for example, this is an "owner" of a Microsoft 365 group. The User role is only allowed to use document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

4.2 FilesApp Document Types

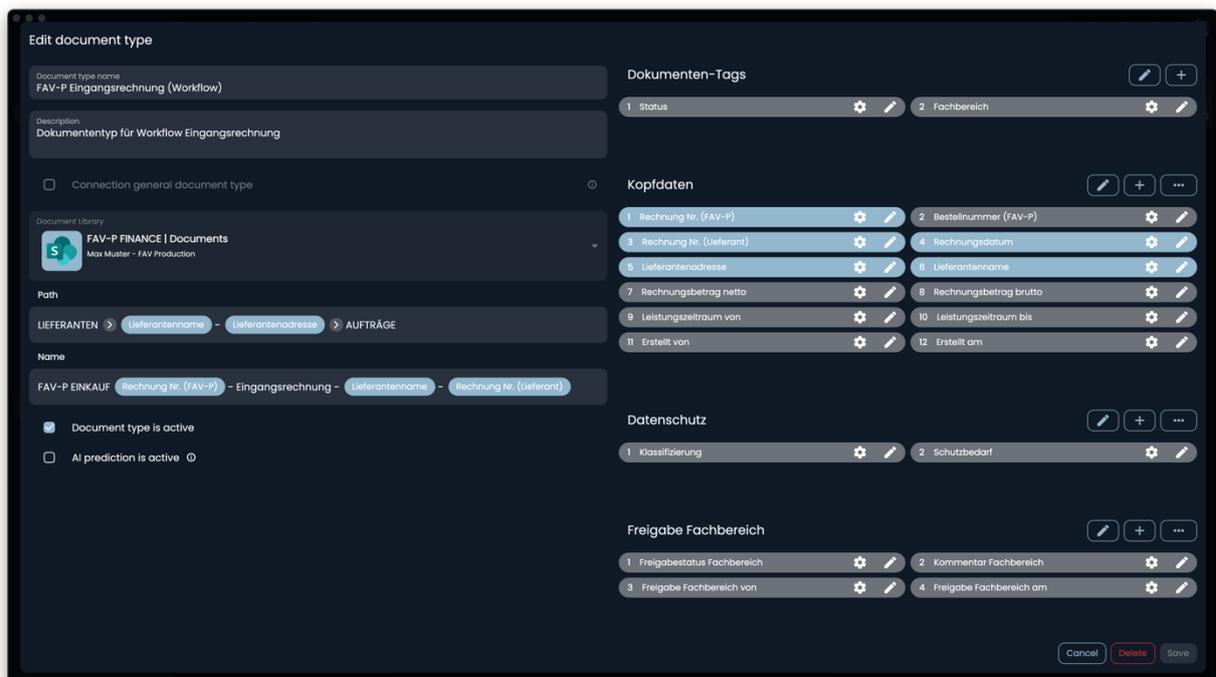
The FilesApp document types create the basis on which storage system, under which directory and with which file name specification a file is to be stored. The corresponding tag contents are stored for this purpose.

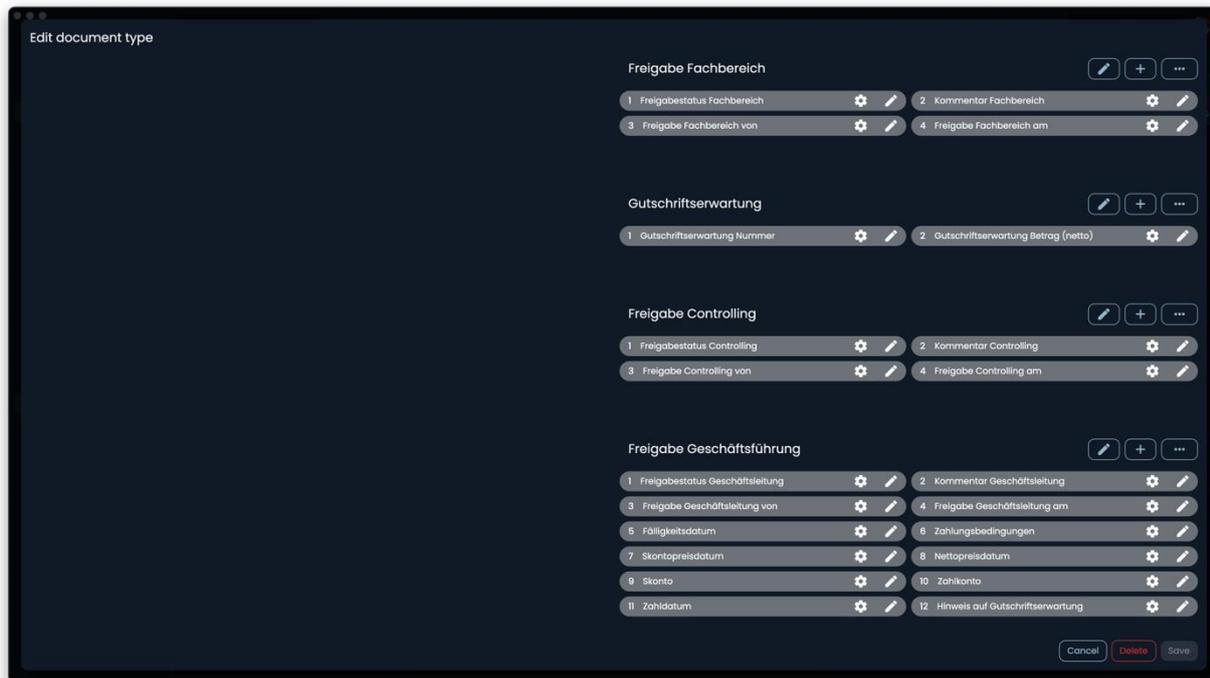
Document types can be kept very simple and can be complex in the number of tags to be set up for process optimizations, workflows or automations, depending on whether several pieces of information are required for a file or, for example, several workflow steps.

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



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:

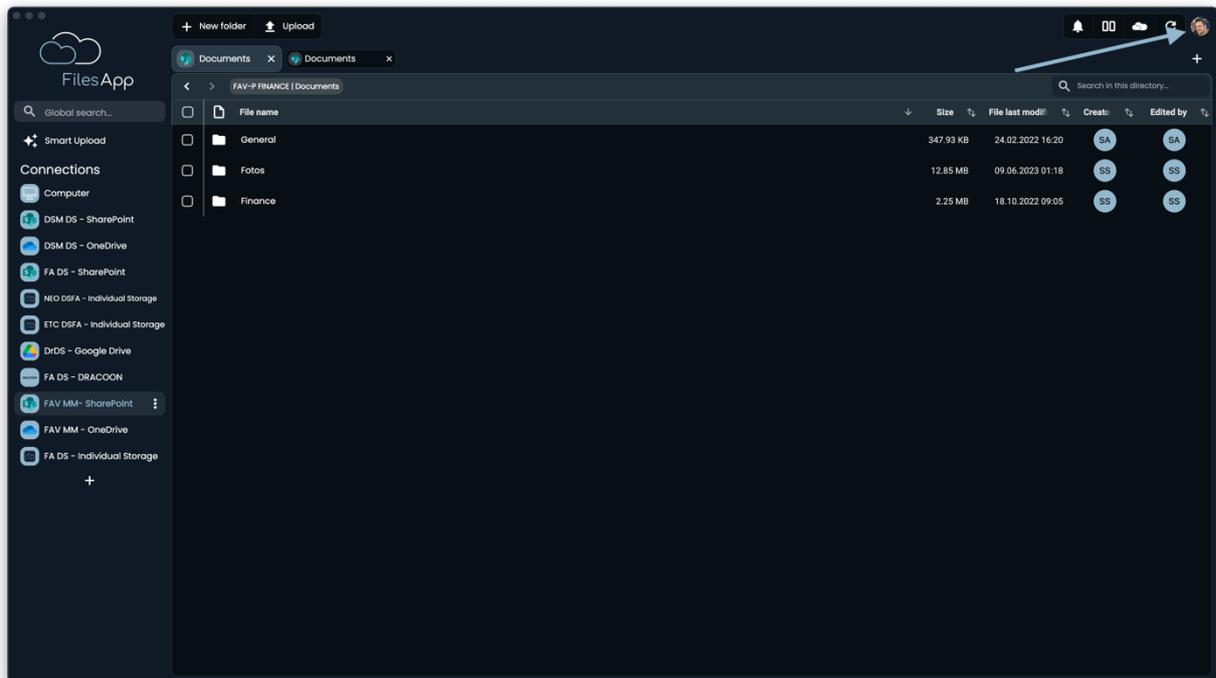




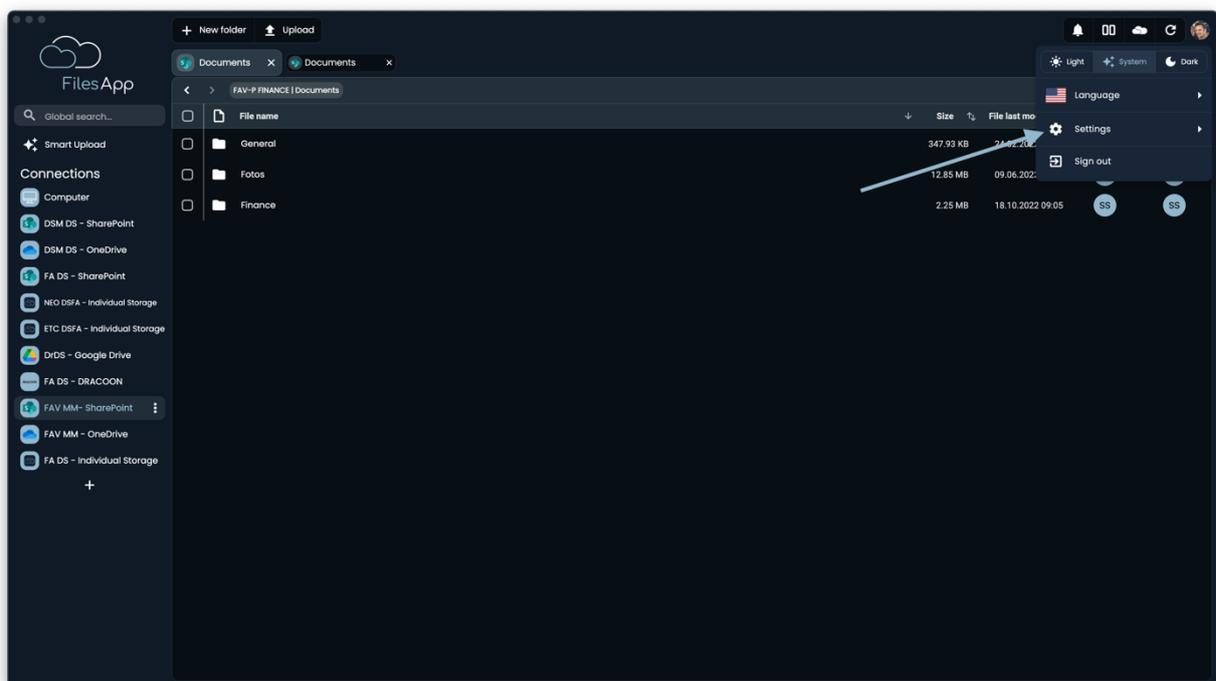
4.2.1 Create Document Types

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

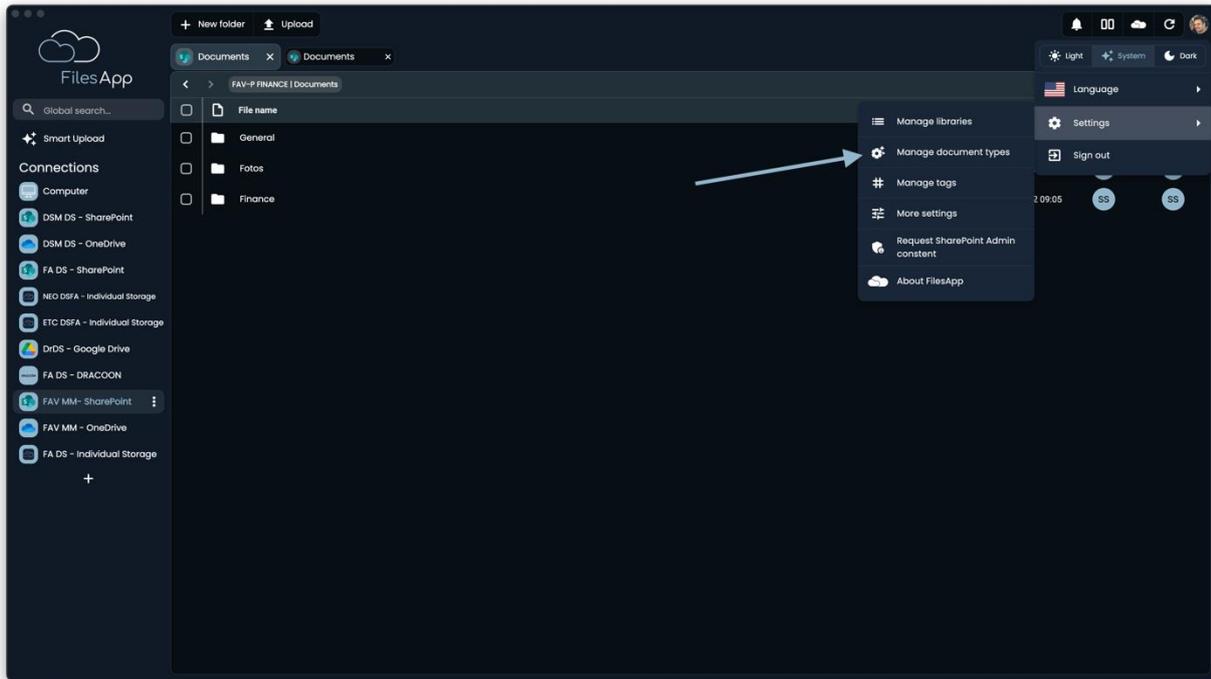
To do this, the user needs the authorization to be able to manage document types. The authorization takes effect from the storage system for which the document type is to be used. For example, in a Microsoft SharePoint environment, the user needs owner rights of a Microsoft 365 group. If the user is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



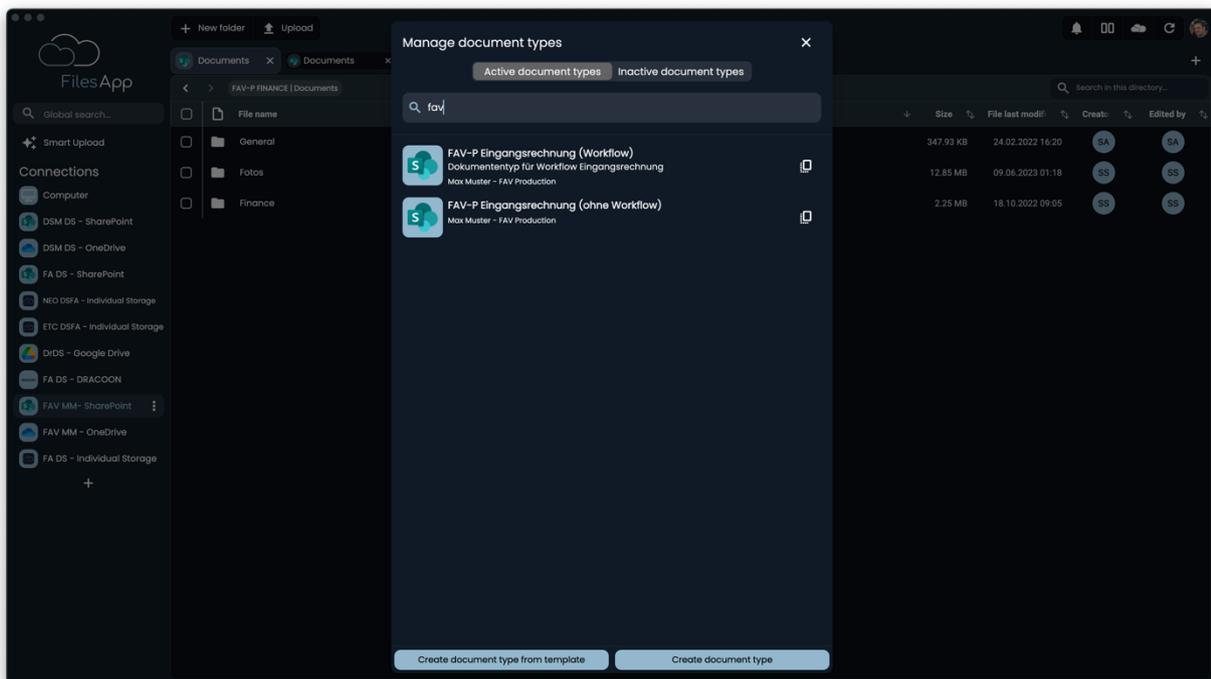
Select the settings area by clicking on the avatar in the upper right corner of FilesApp window.



Select Settings.



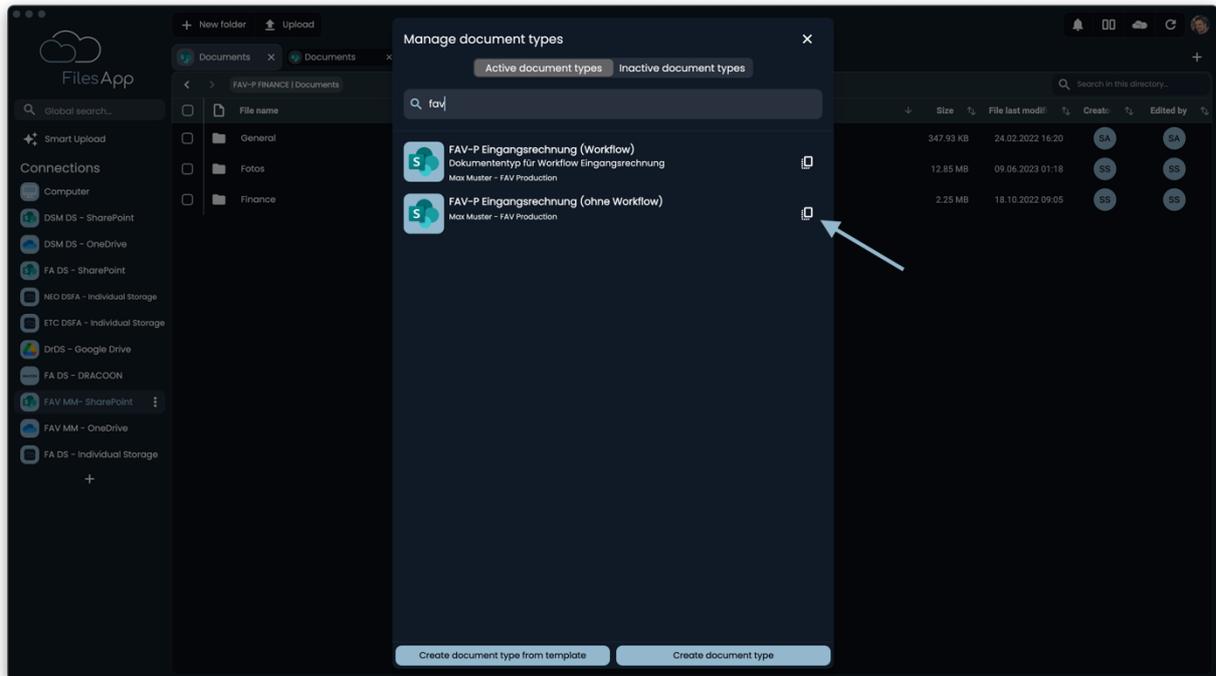
Select Manage Document Types.



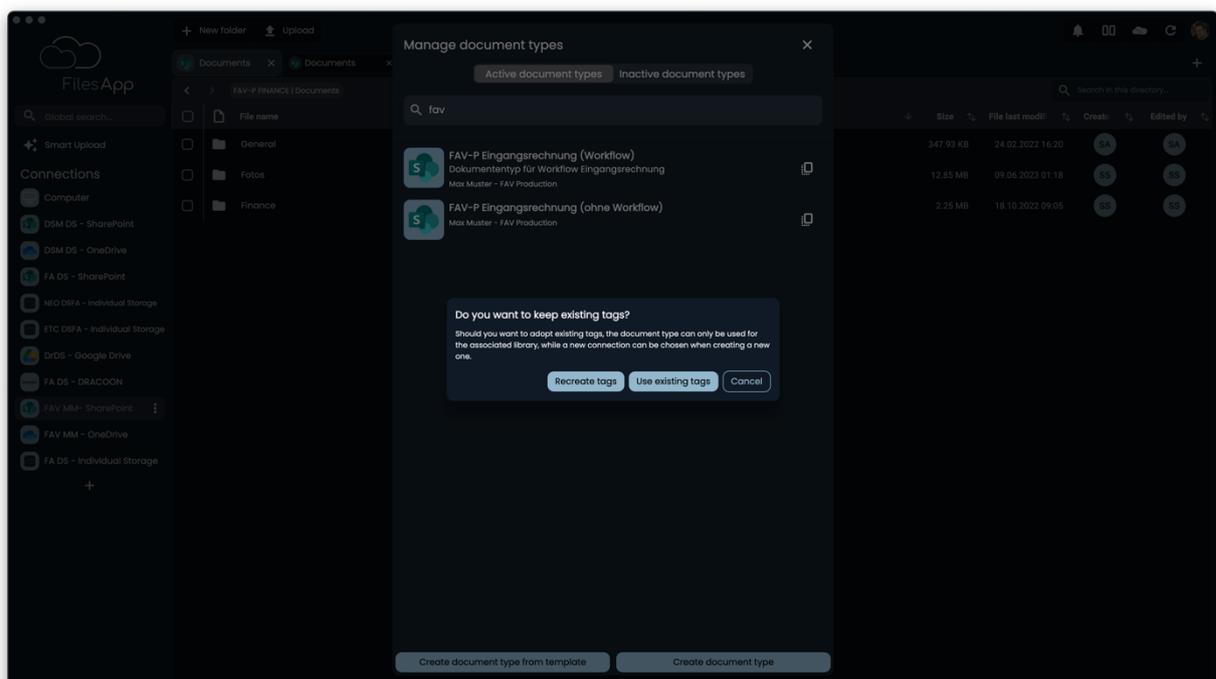
The document types to which the user has access are then displayed and the document types can be filtered using the search field.

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.



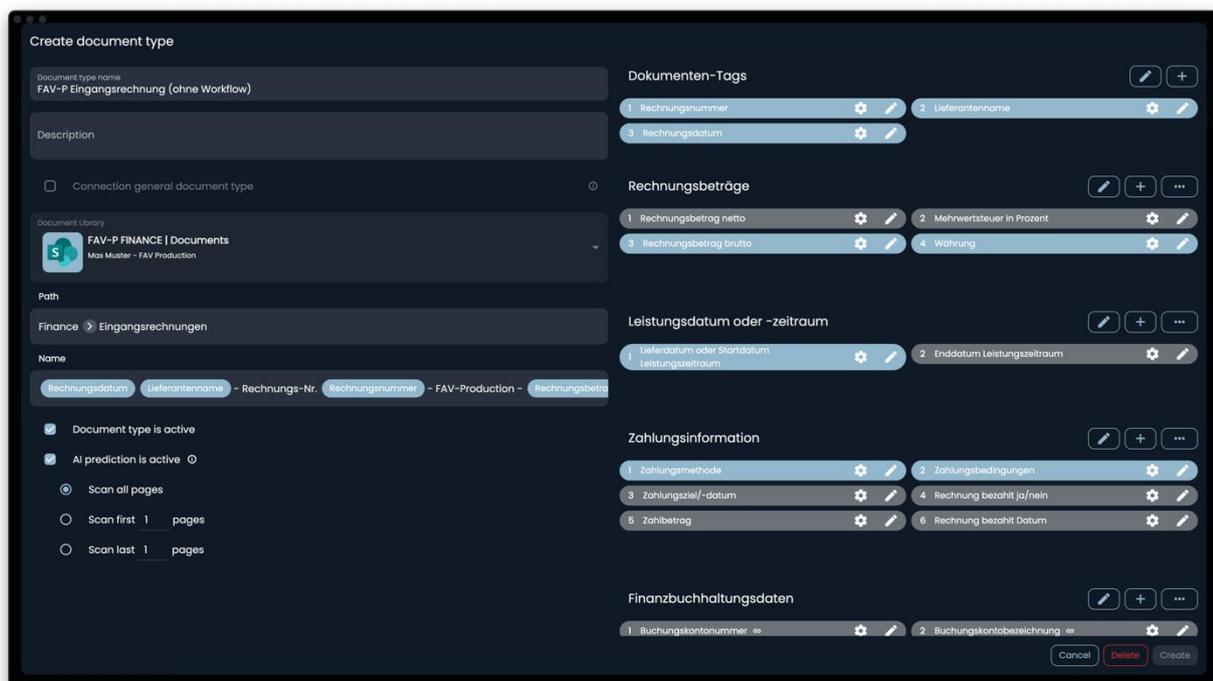
When copying a document type, the user can decide whether the tags contained therein should be included or copied into new tags.

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.

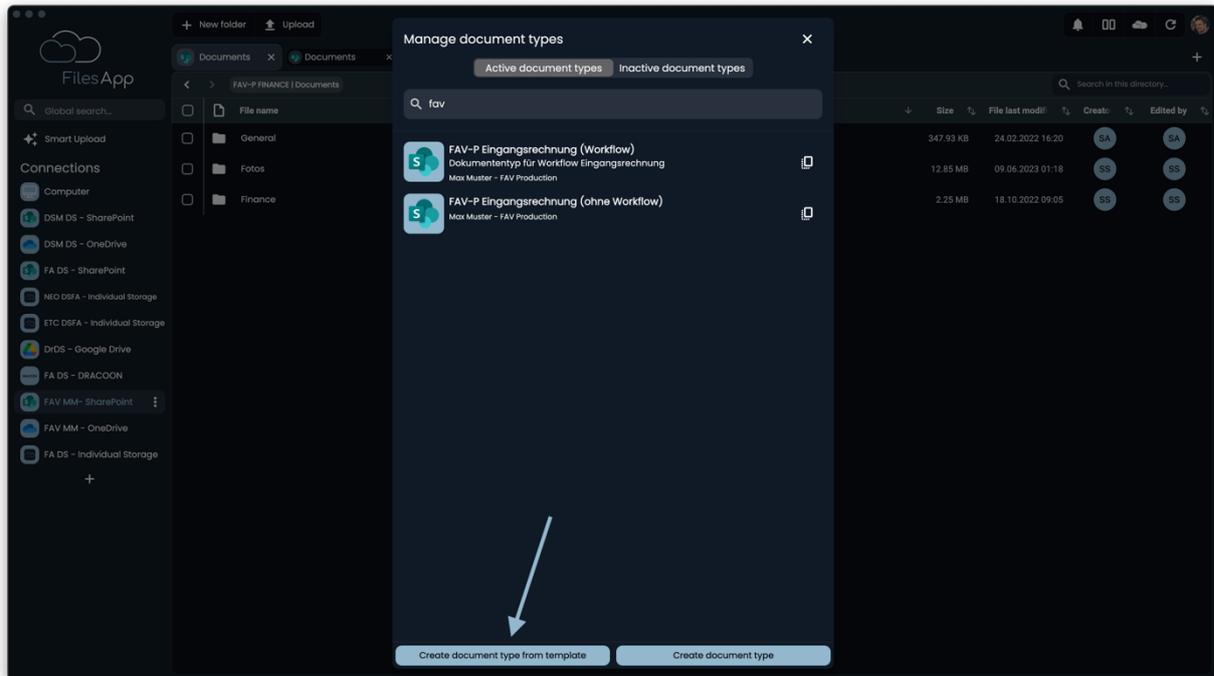
See also the Tag Creation section of the statement of work.



After selection, the document type can be customized.

4.2.3 Create a document type from a template

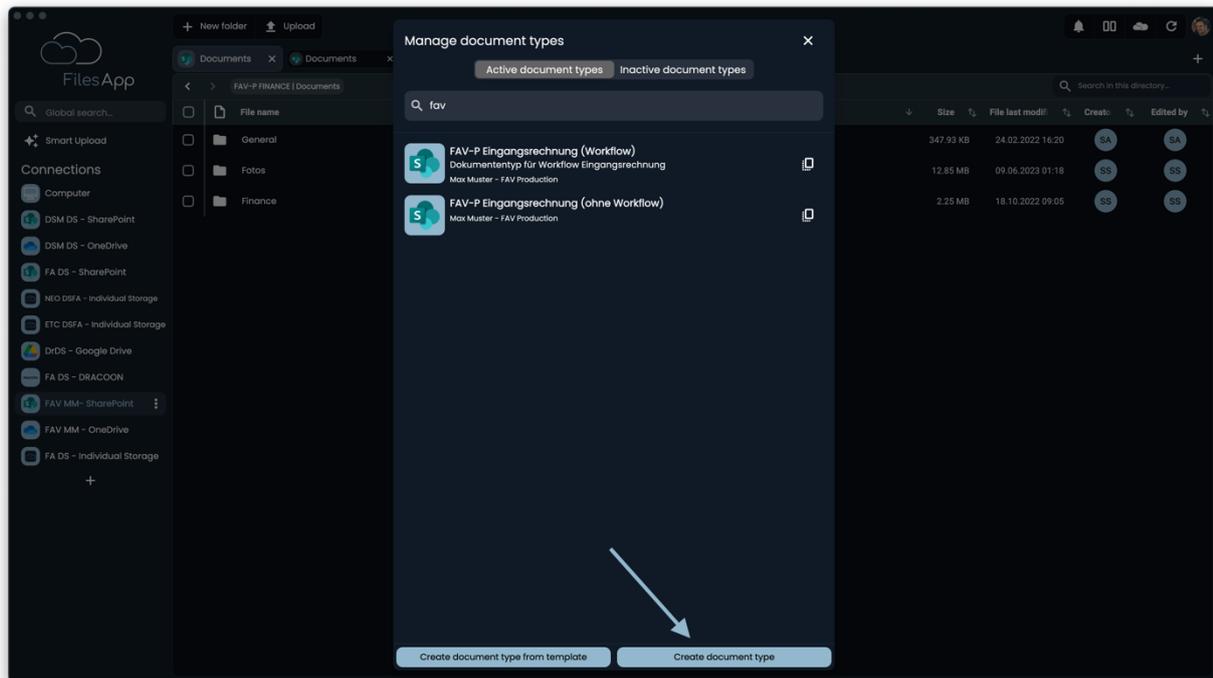
FilesApp provides numerous document type templates that have proven themselves in practice. These can be templates for invoices, insurance documents, bank statements, correspondence and much more.



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.

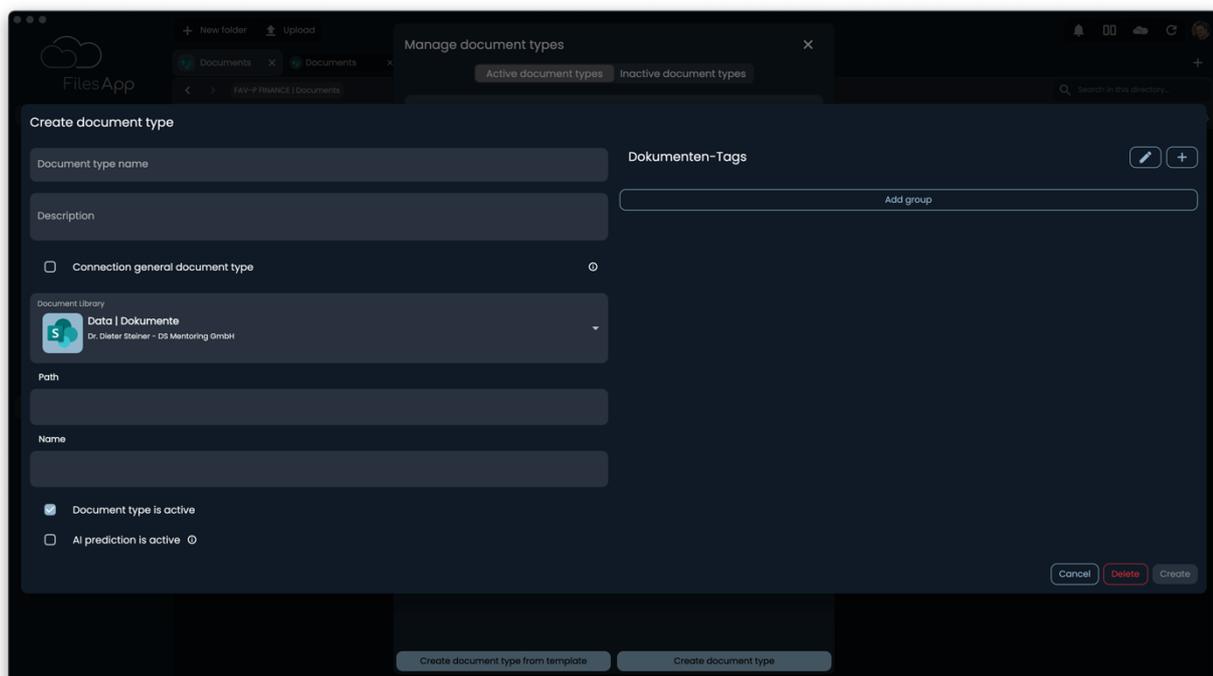


To do this, select Create Document Type.

4.2.5 Document Type Administration

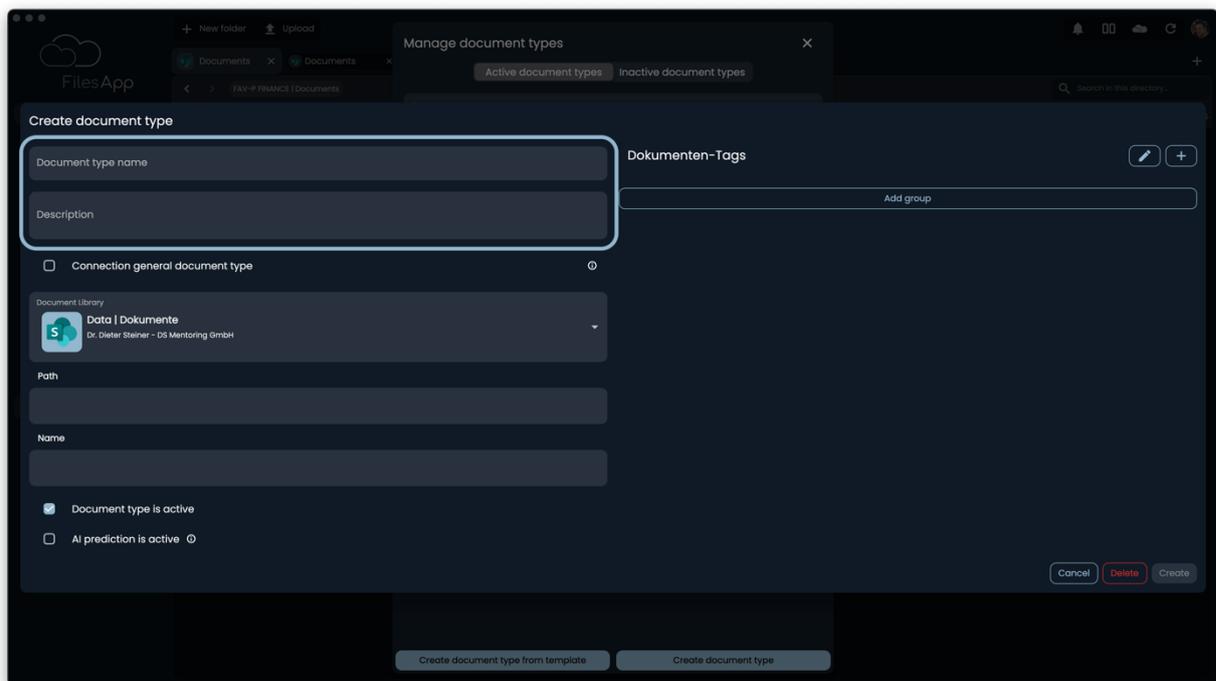
4.2.5.1 View

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



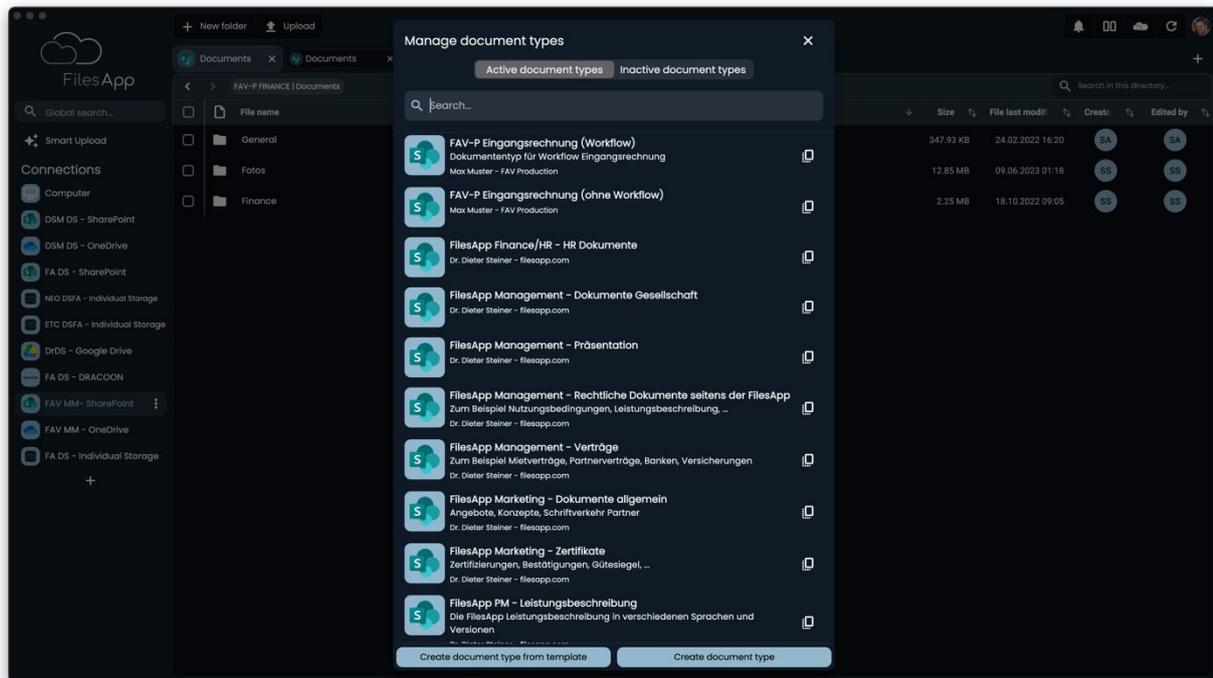
4.2.5.2 Document type designation and description

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.



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:



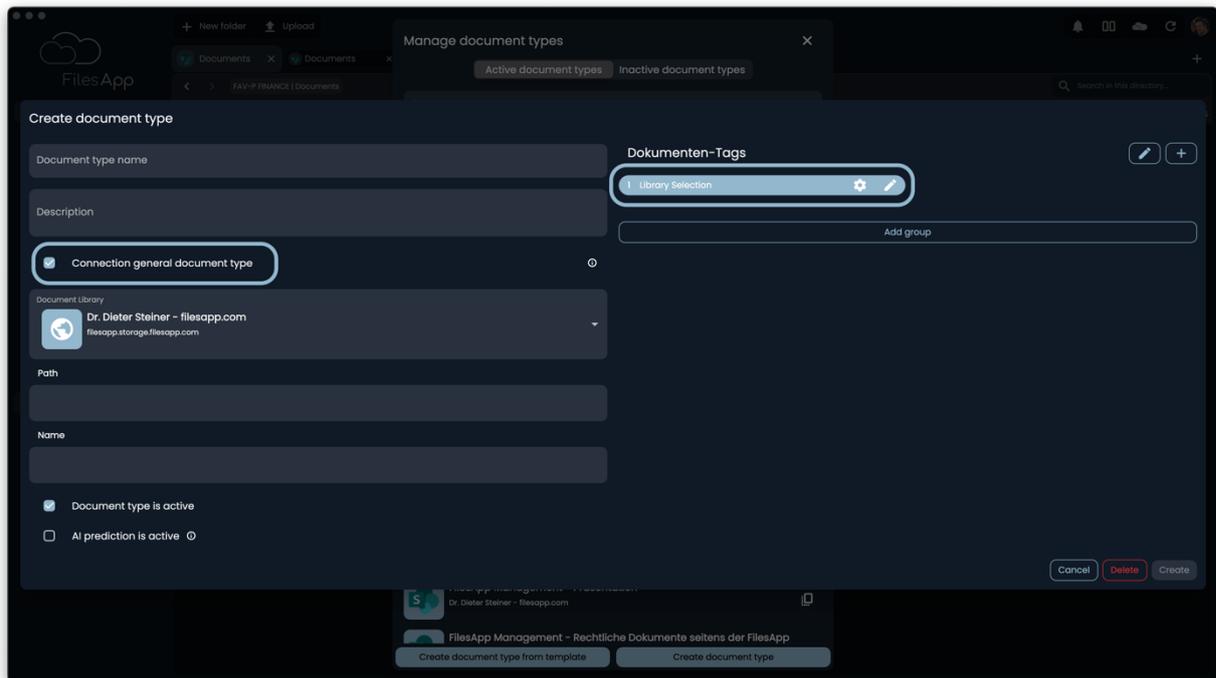
The naming makes it easy to quickly find a document type relevant to a document or file.

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.

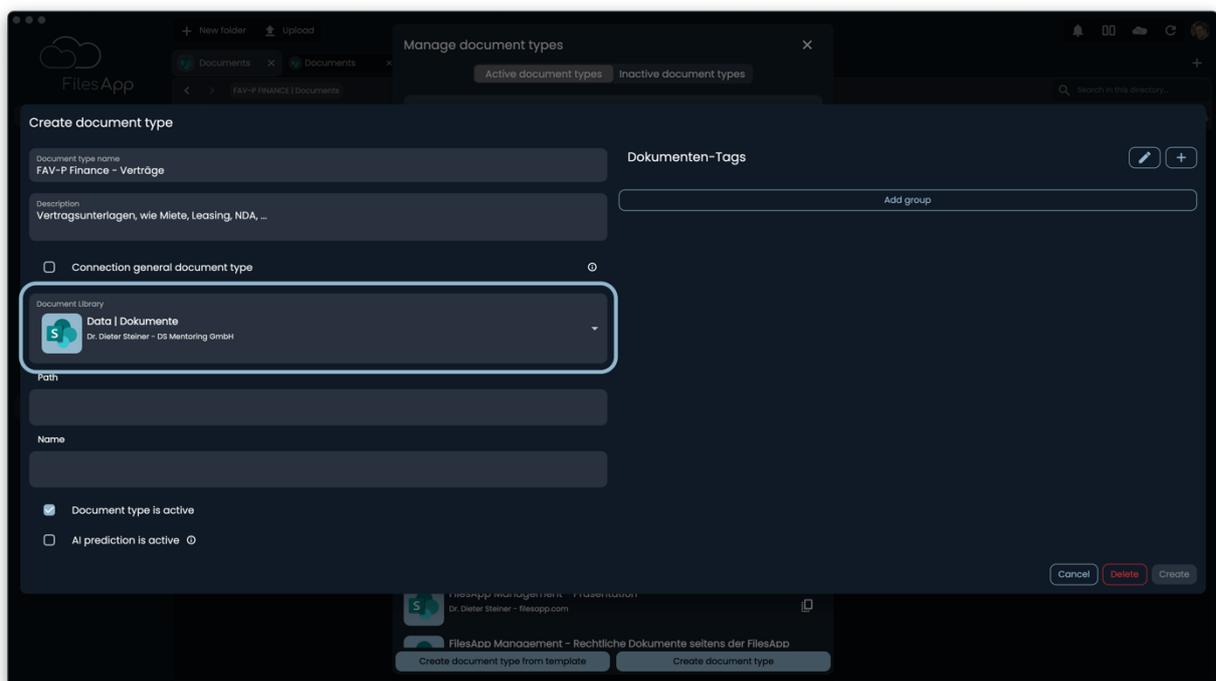
If a document type is to be available for all document libraries of a connection, this can be activated via "Connection general document type".

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.

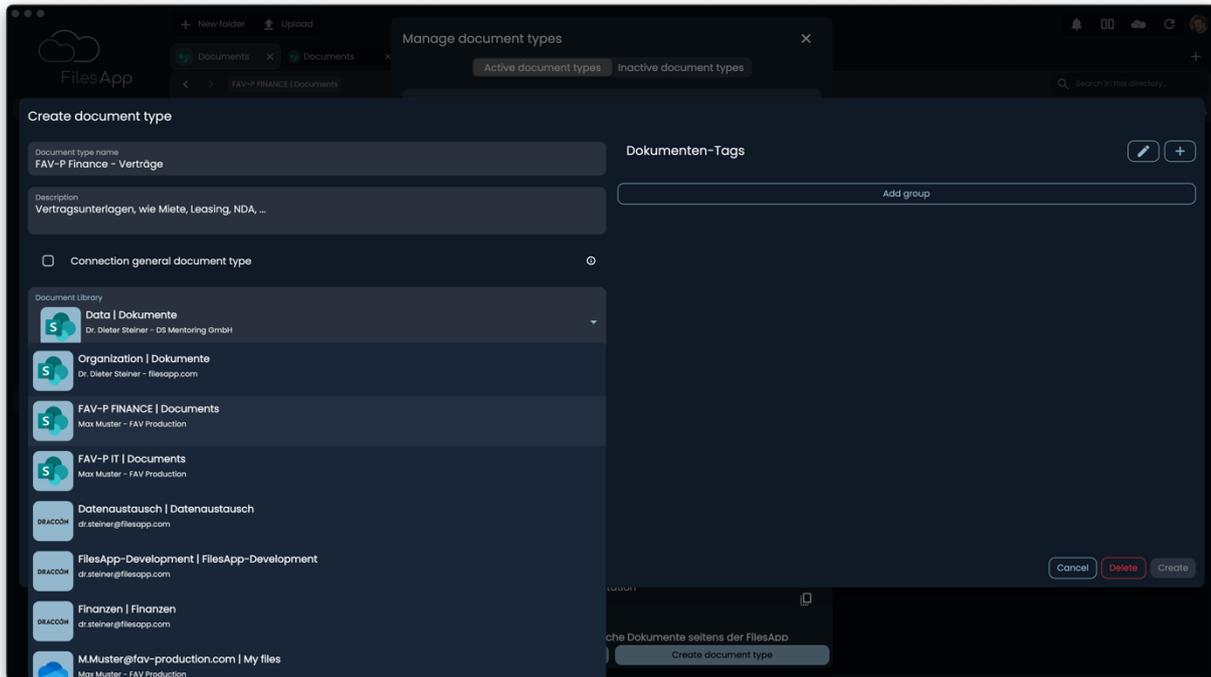


4.2.5.4 Selection of the Document Library

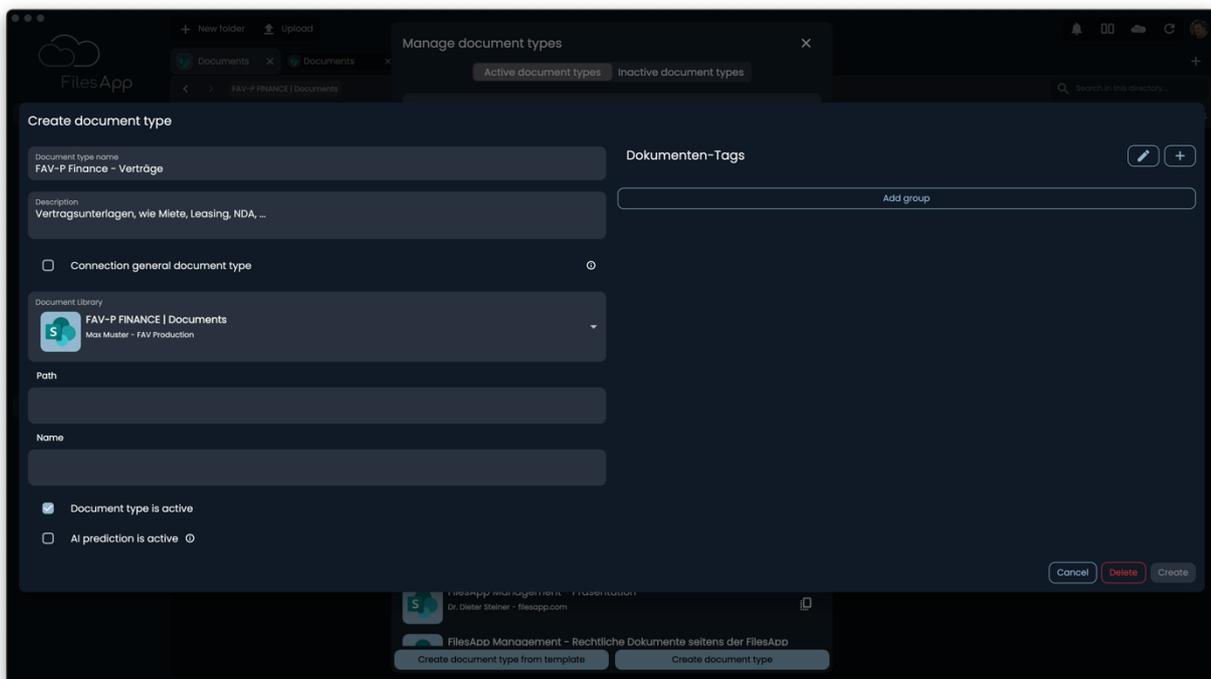
This area is used to select the document library in which the files are to be saved via this document type.



All integrated and authorized document libraries are displayed by selection.



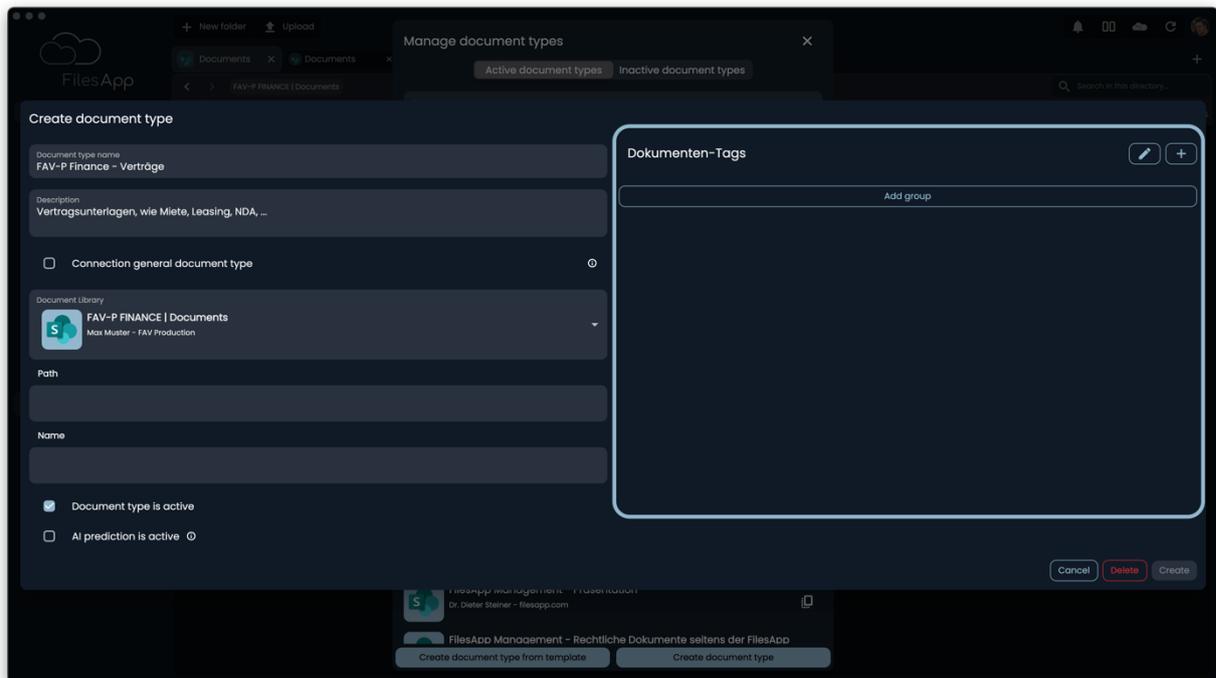
Select the relevant document library. In our example, "FAV-P FINANCE".



4.2.5.5 Document Tags

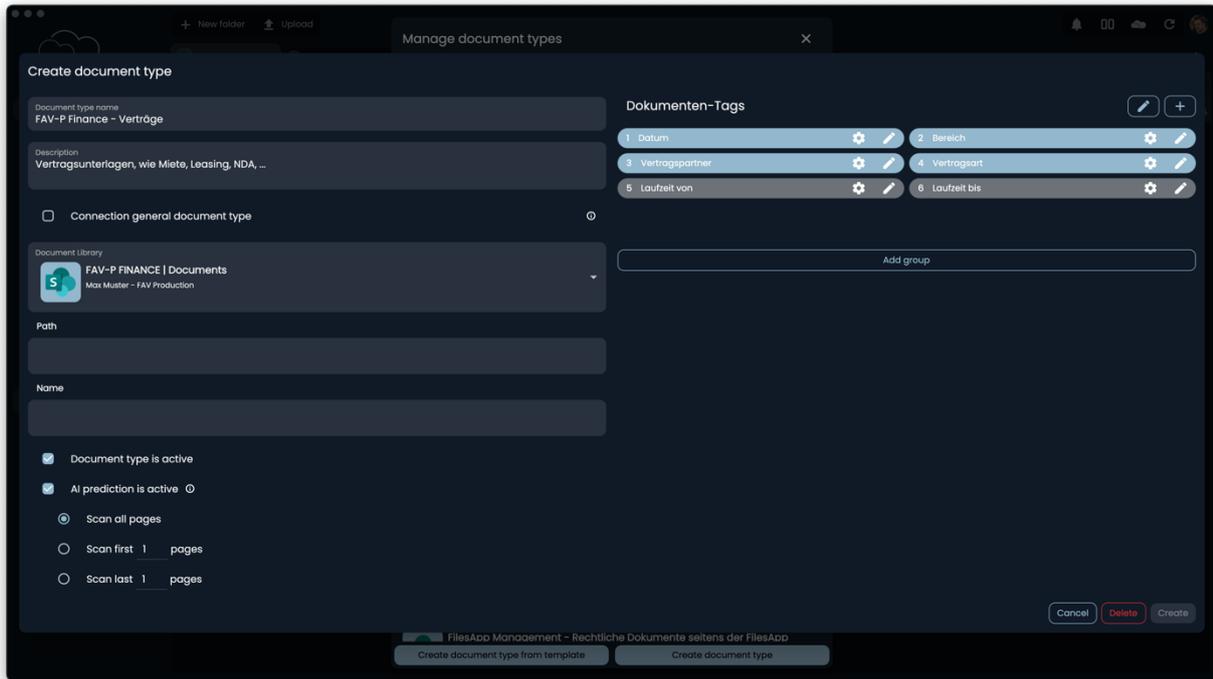
Tags are required for fast search, directory structure, and file naming convention of the files to be stored on the storage system using this document type.

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



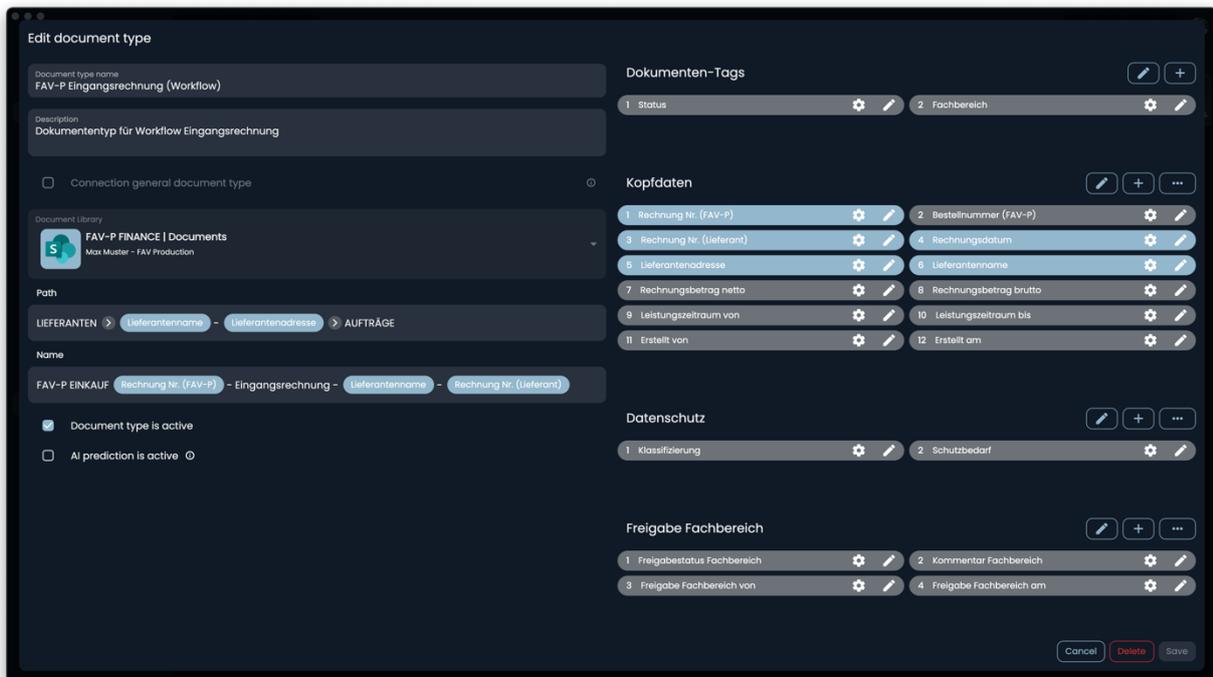
Tags can be added via the plus icon at the top right of the marked area. If the document type has been taken from a template or if a document type has been copied, the adopted tags are already available.

Here is an example of tags, the [FilesApp Tags](#) section is dedicated in detail to the creation and configuration of tags.



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

Tag groups can be renamed via the change icon.



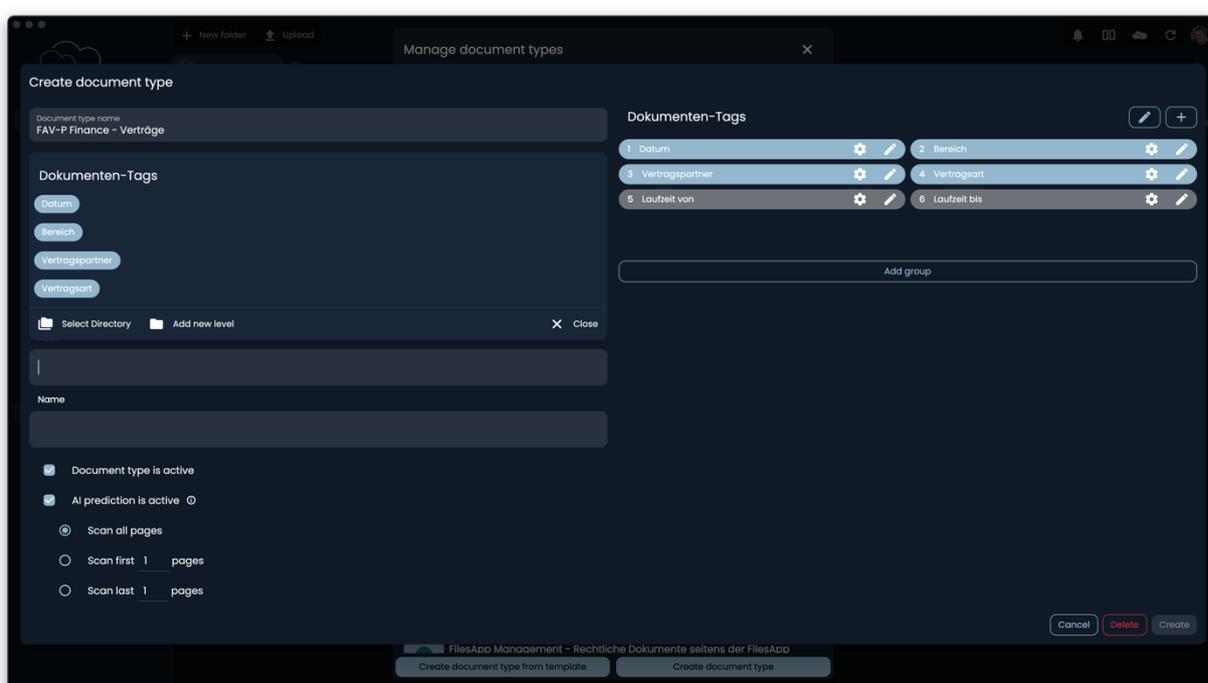
In this way, even complex structures and information can be clearly mapped.

4.2.5.6 File Path

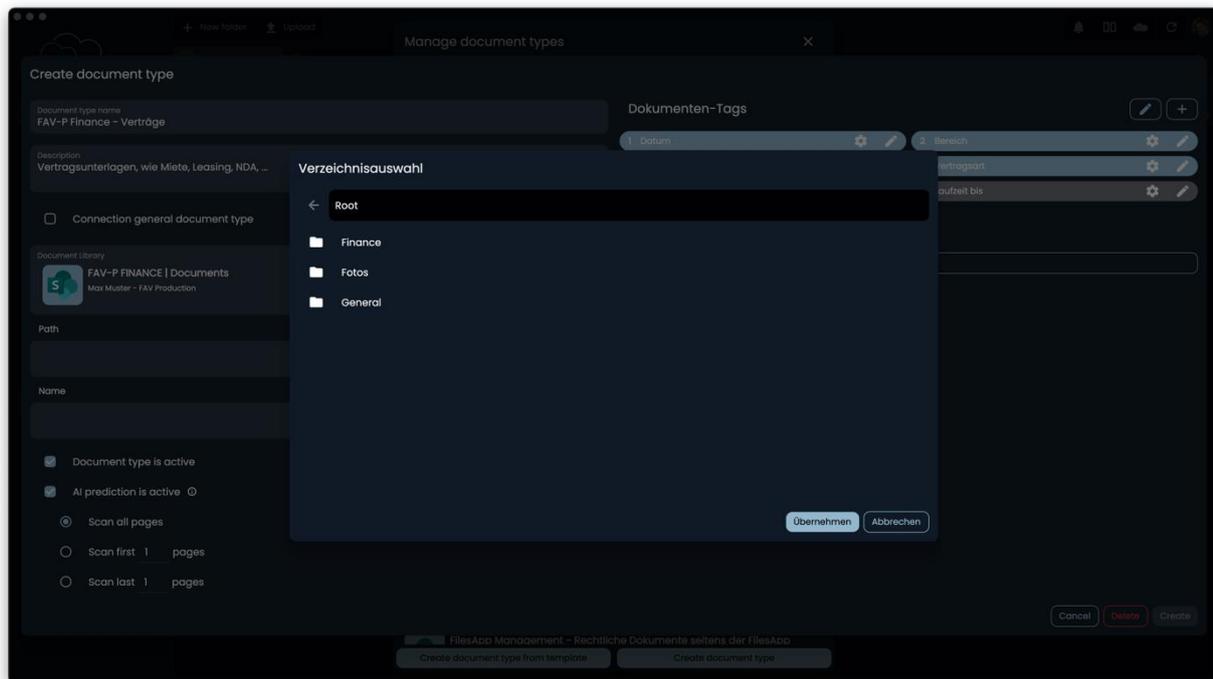
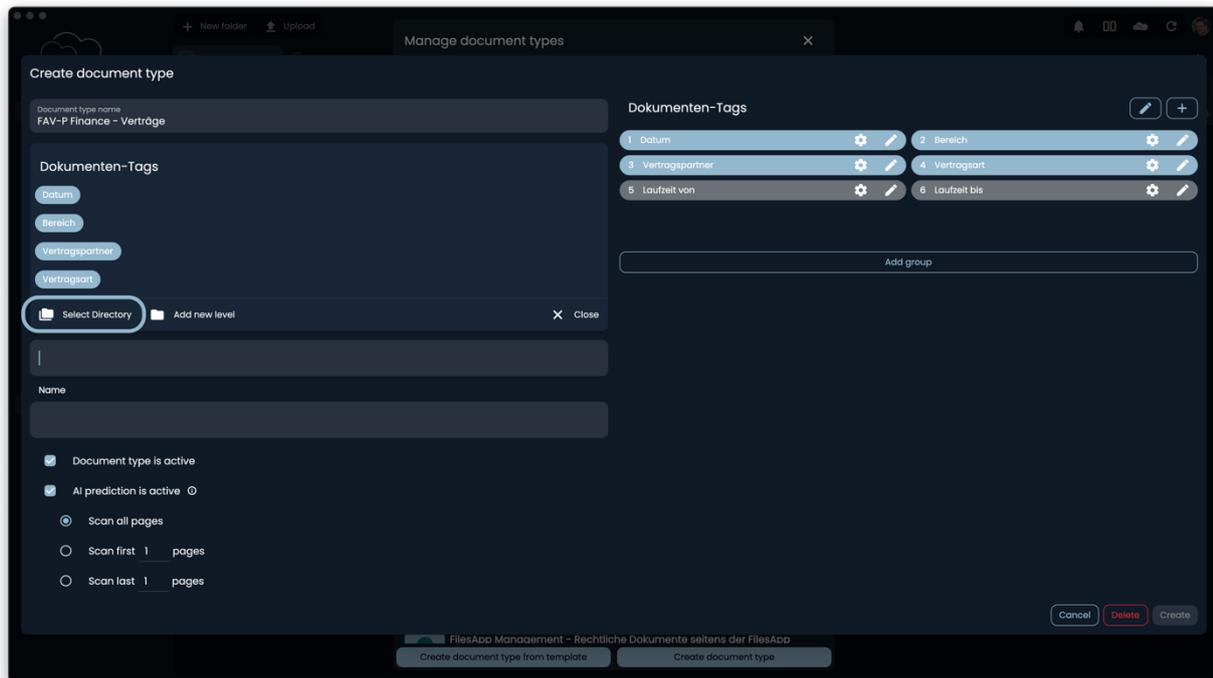
The path, i.e. the directory under which the files about this document type are to be stored on the selected storage system, can be configured in this field.

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.

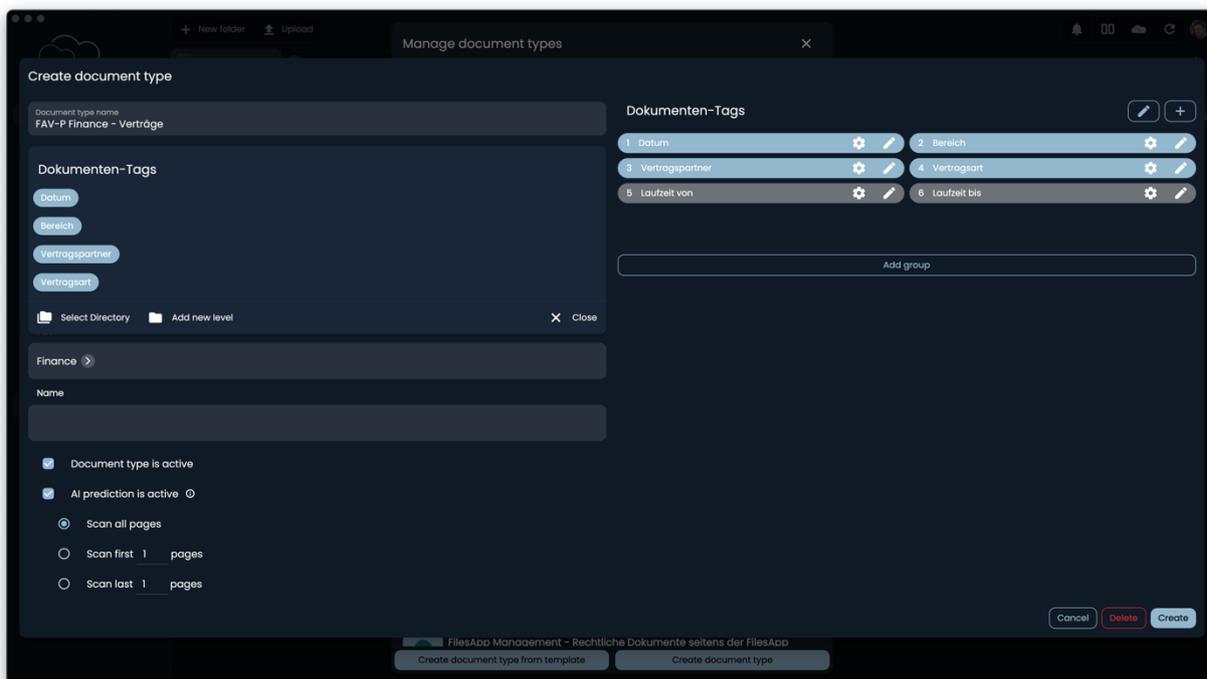
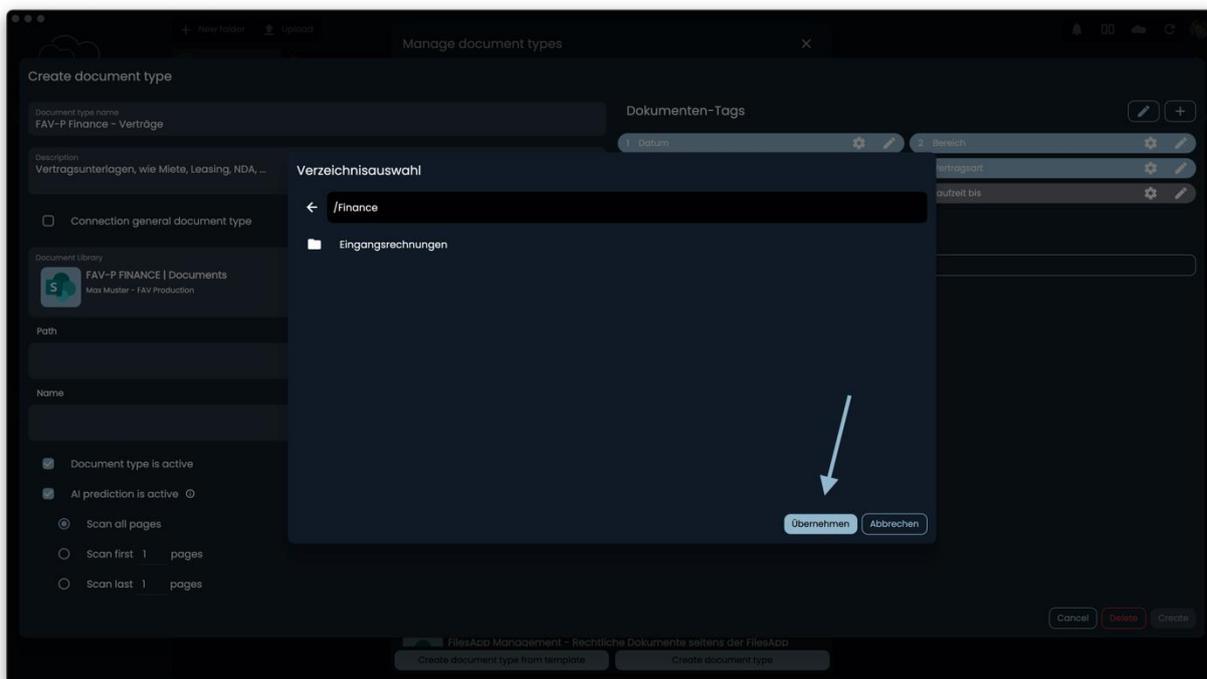
If document tags have been configured in the document type and declared as required tags, the path and file name can be configured with variables - the tag contents - see FilesApp Tags section.

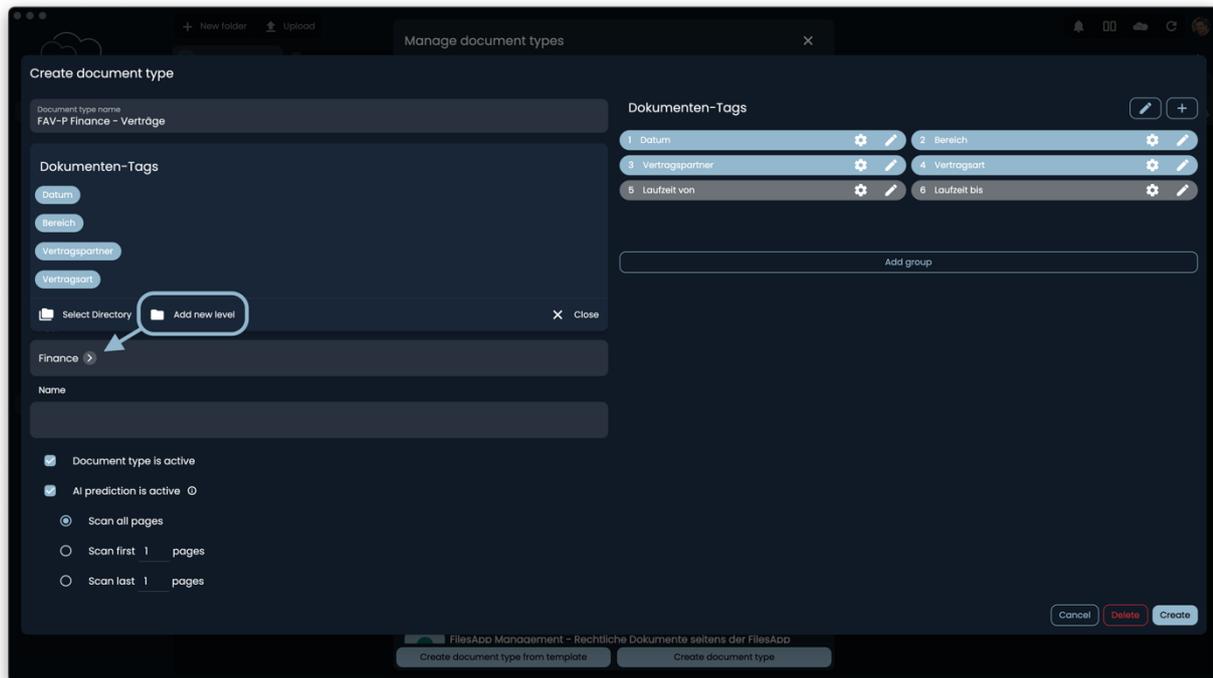


First, select the root directory of the document library.

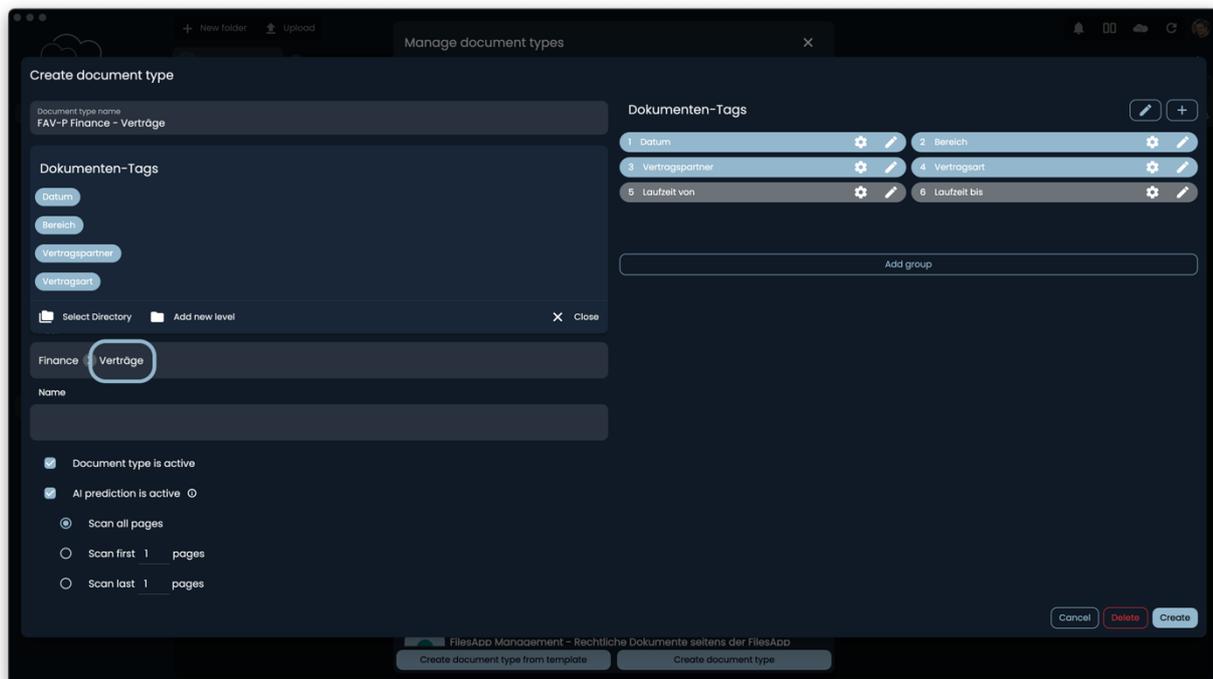


There is no need to create directories manually, FilesApp takes care of that. For the directory, select the top level of the directory and then proceed to the structure creation.

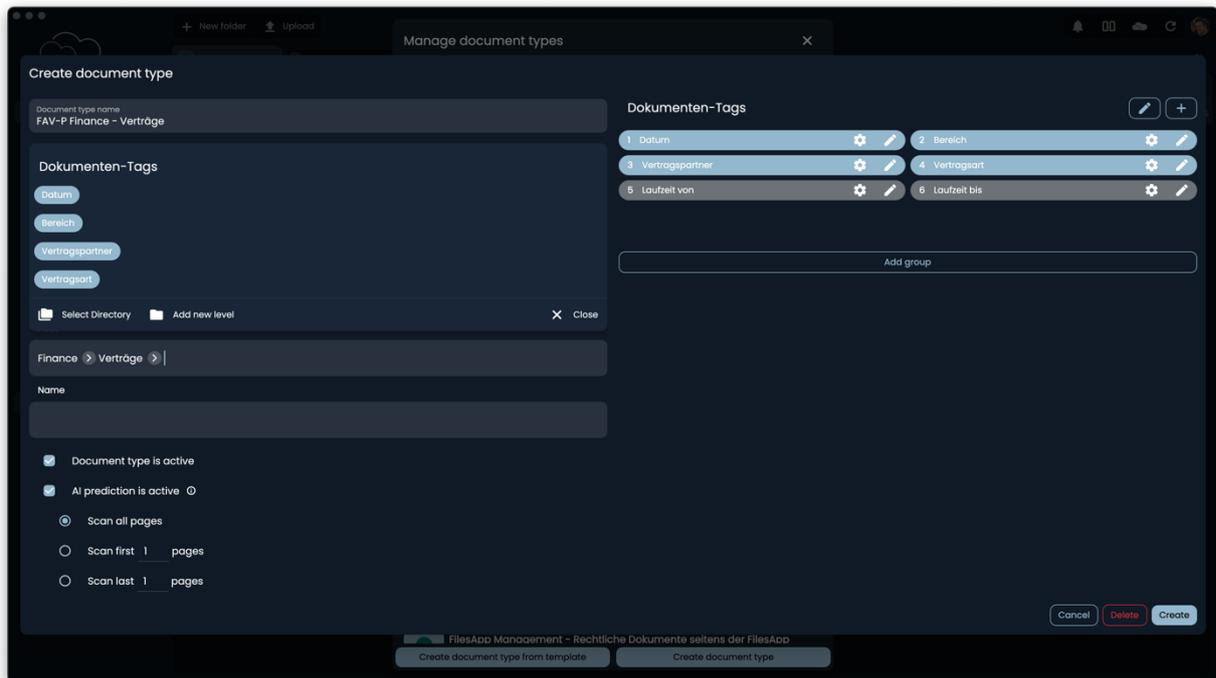




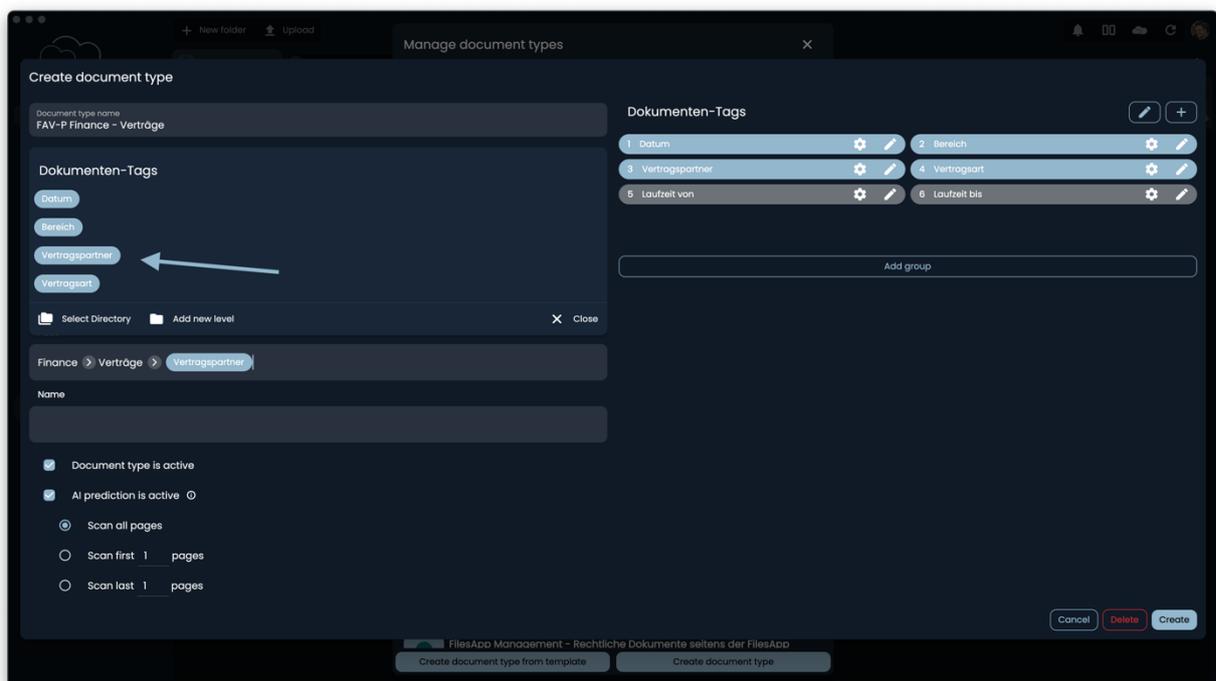
By adding a new level, a directory level or a subdirectory can be created.



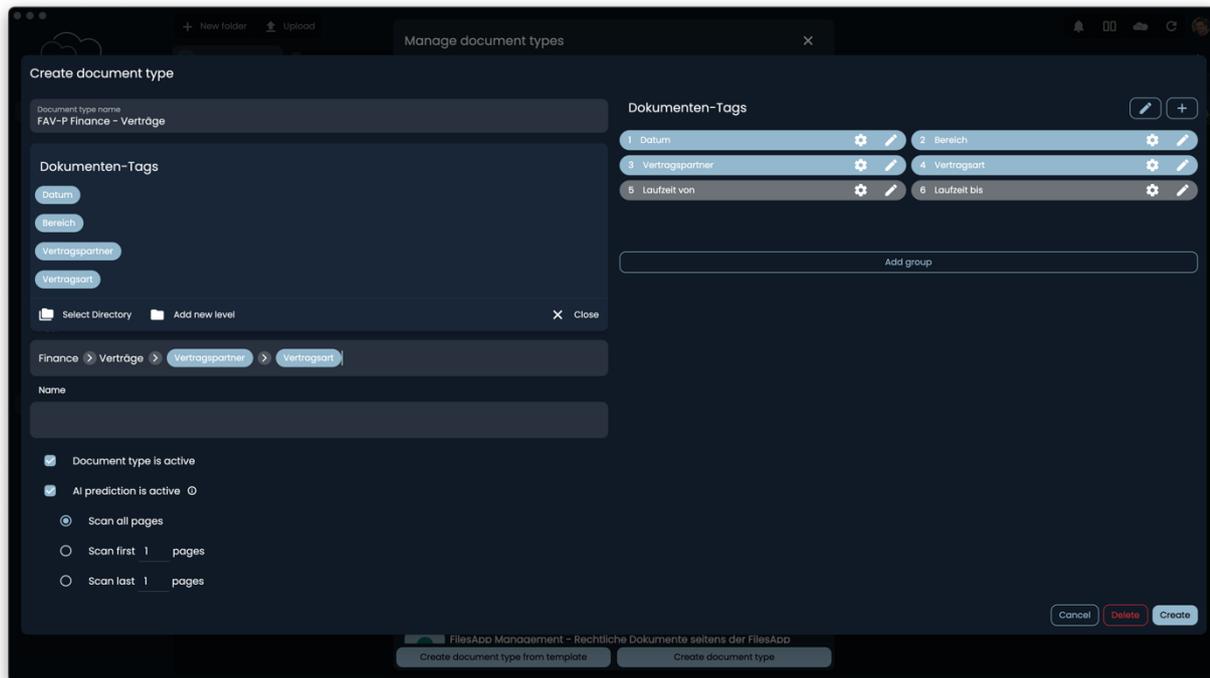
Then enter a constant or variable for the subdirectory. In this case, a constant labeled "Contracts", typed using the keyboard.



This example adds another level.



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.



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:

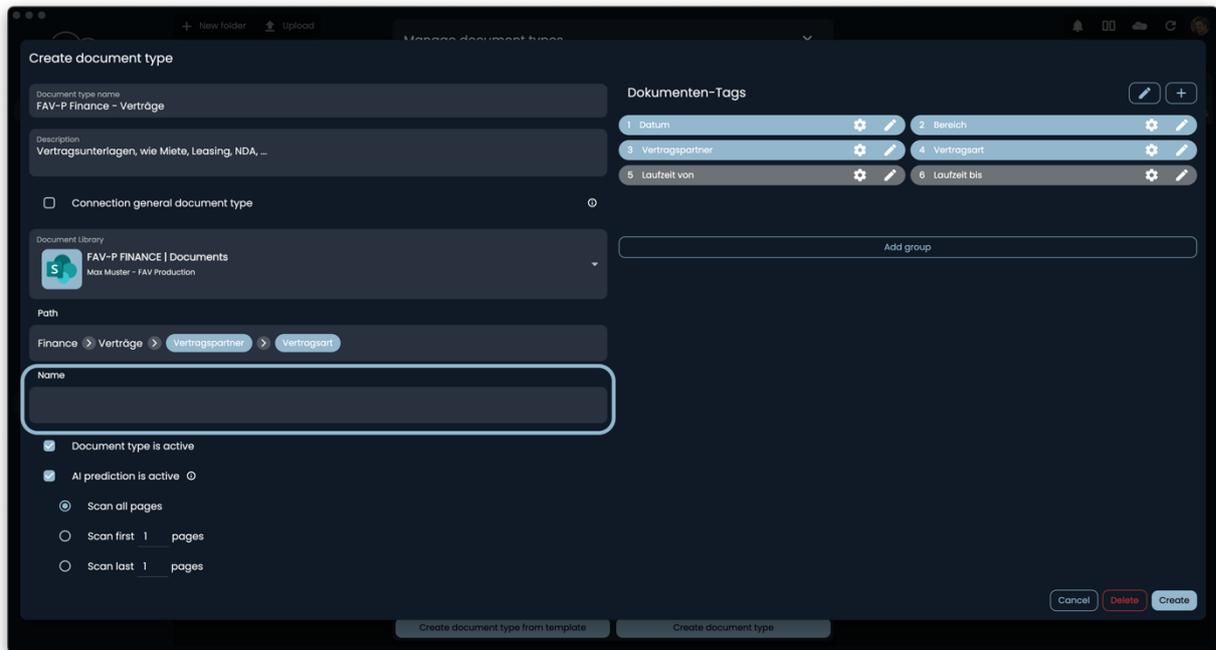
```
\\FAV Production\FAV-P FINANCE\Finance\Verträge\VersicherungsAG\Betriebliche Altersvorsorge
\\FAV Production\FAV-P FINANCE\Finance\Verträge\VersicherungsAG\Direktversicherung
\\FAV Production\FAV-P FINANCE\Finance\Verträge\VersicherungsAG\Unterstützungskasse
```

4.2.5.7 Filename

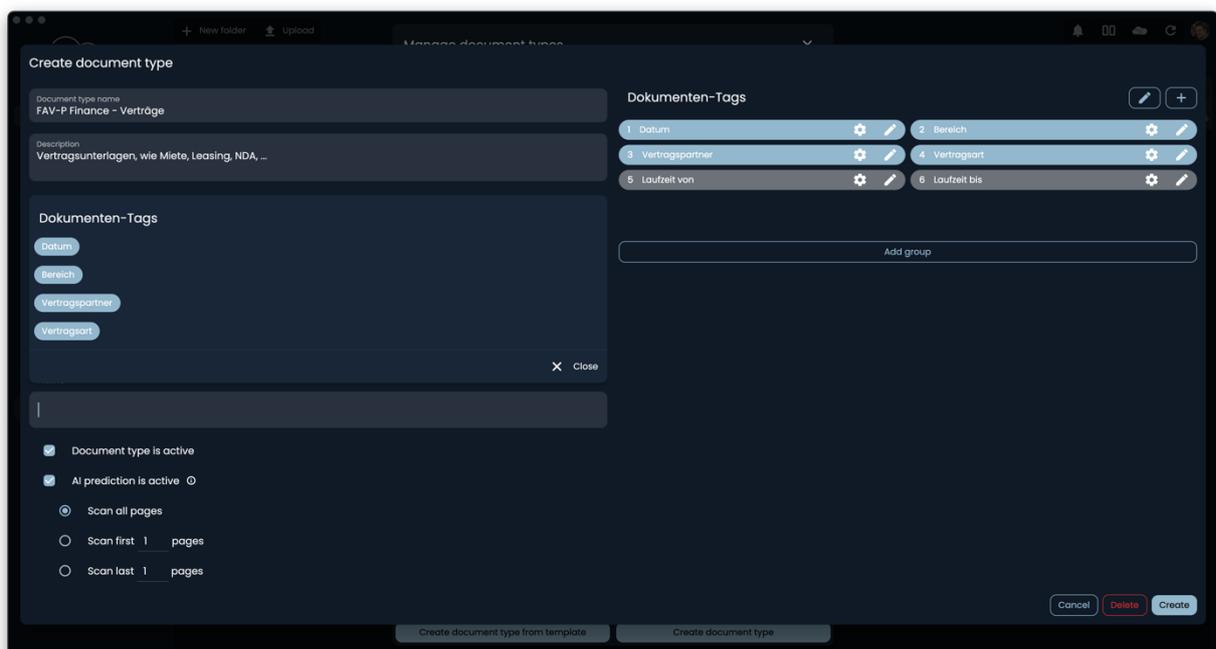
Configuring the file name of a document type follows the same logic as creating the directories.

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.

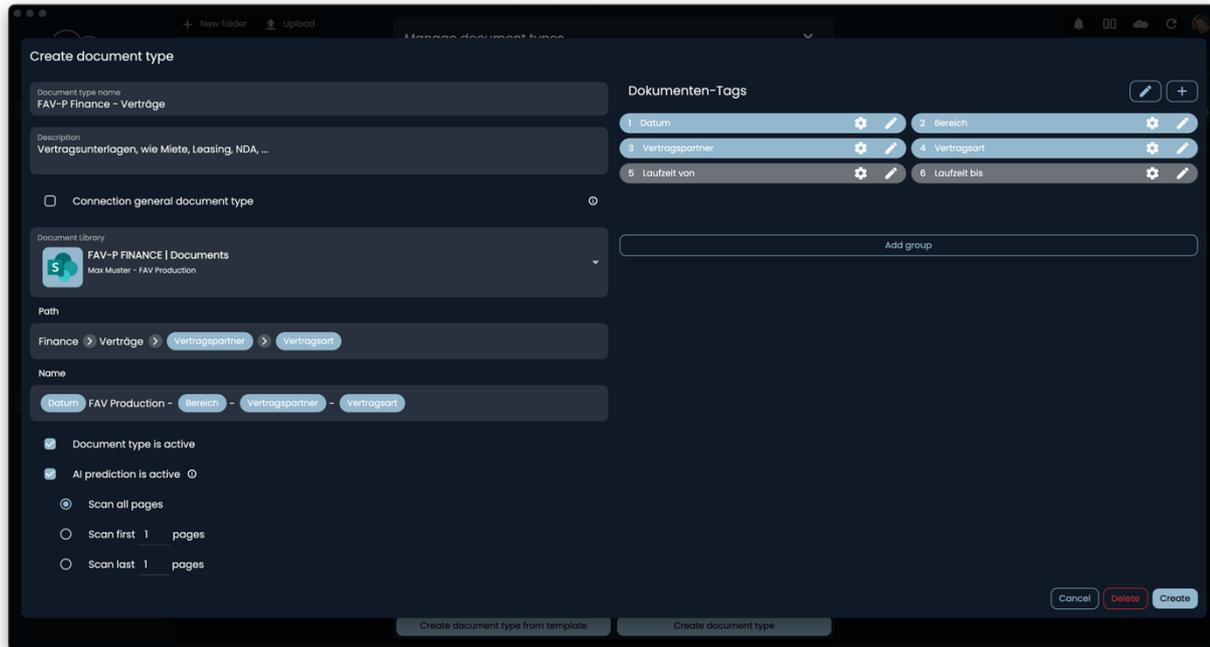


The options are available by selecting the file name field in the document type.



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.



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.

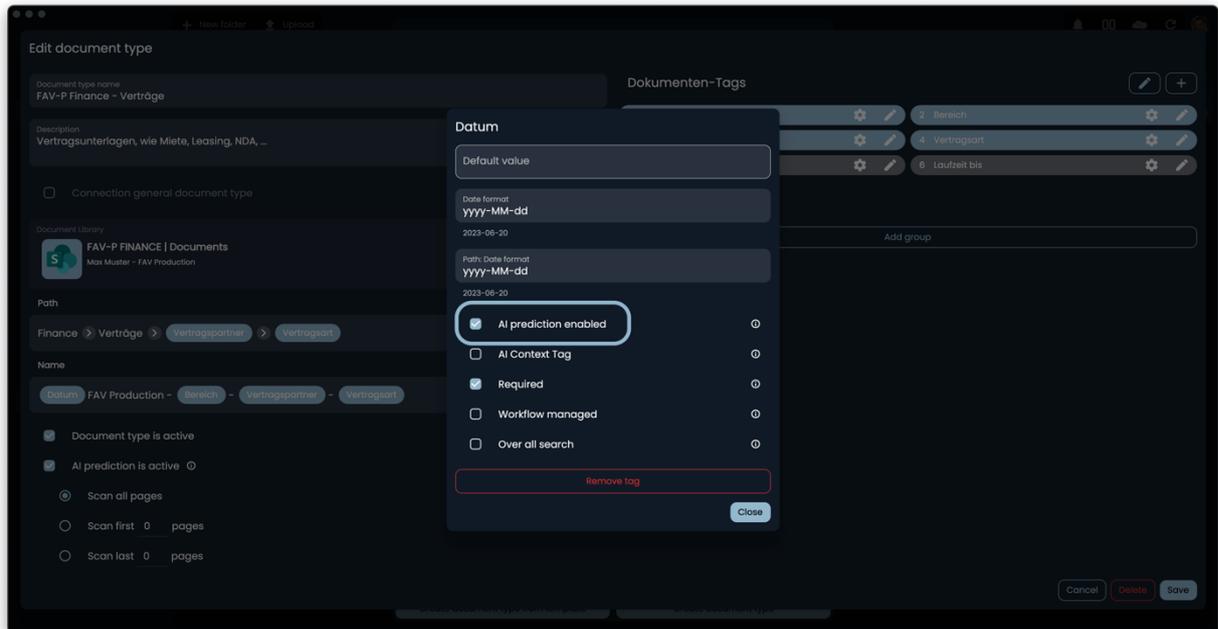
4.2.5.8 AI prediction enabled

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.

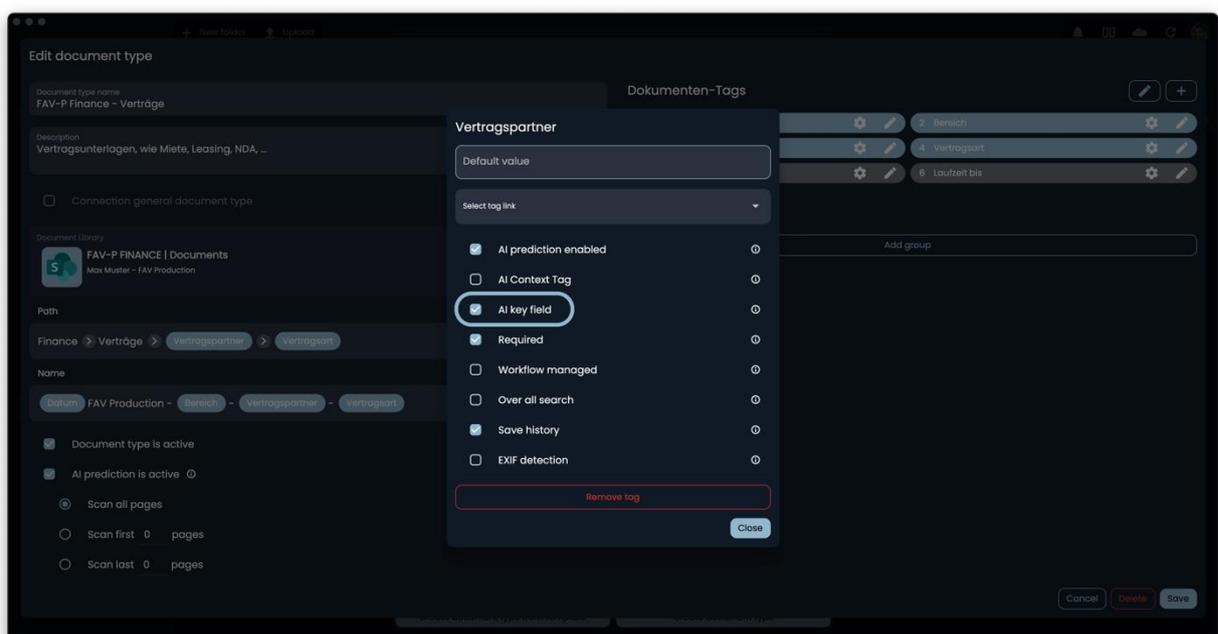
The indexing for the search runs independently of this, it is irrelevant how much data and what amount of content is indexed. Indexing runs in the background and takes a certain amount of time, depending on the amount of files and content.

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



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

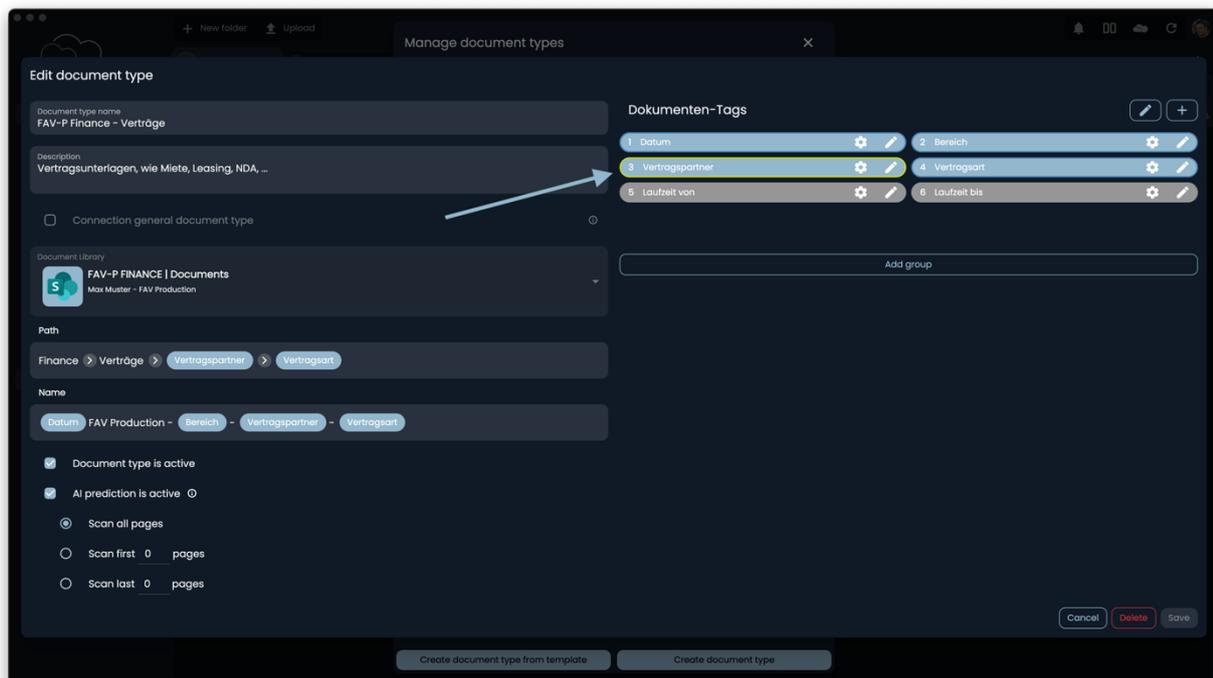
In addition, a Tag is used to recognize the Document Type.



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.

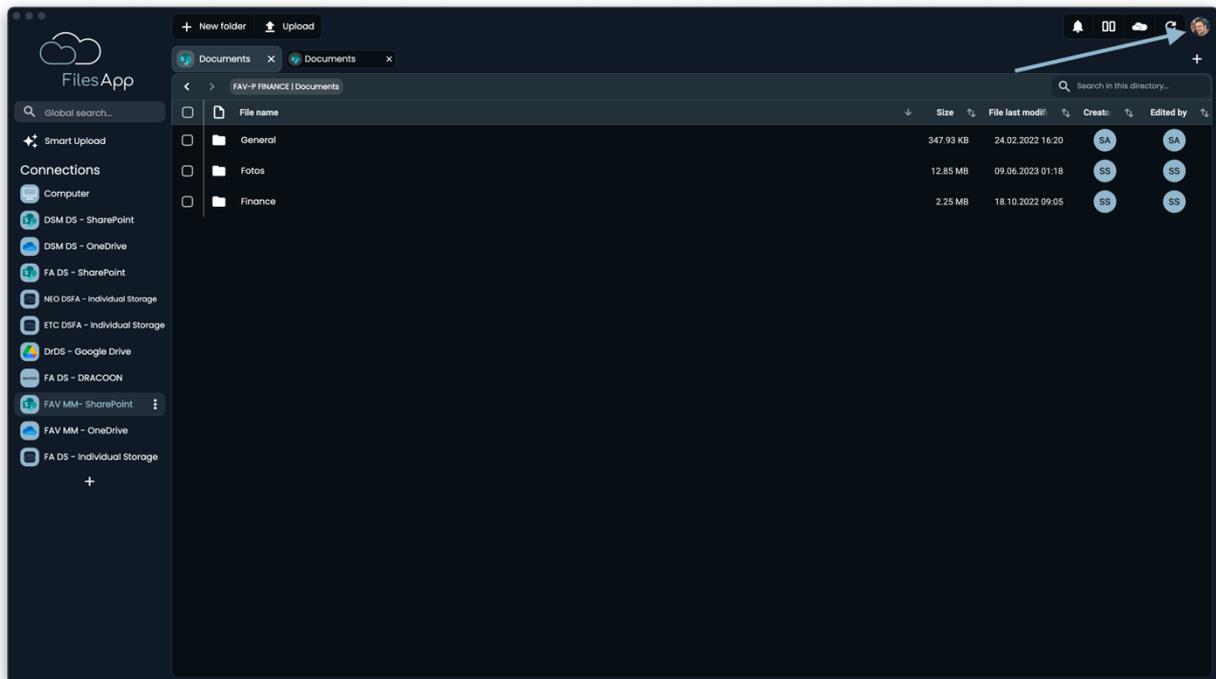
When configuring a document type, the outline of the AI key field in the color "Lime" supports it in order to recognize it directly.



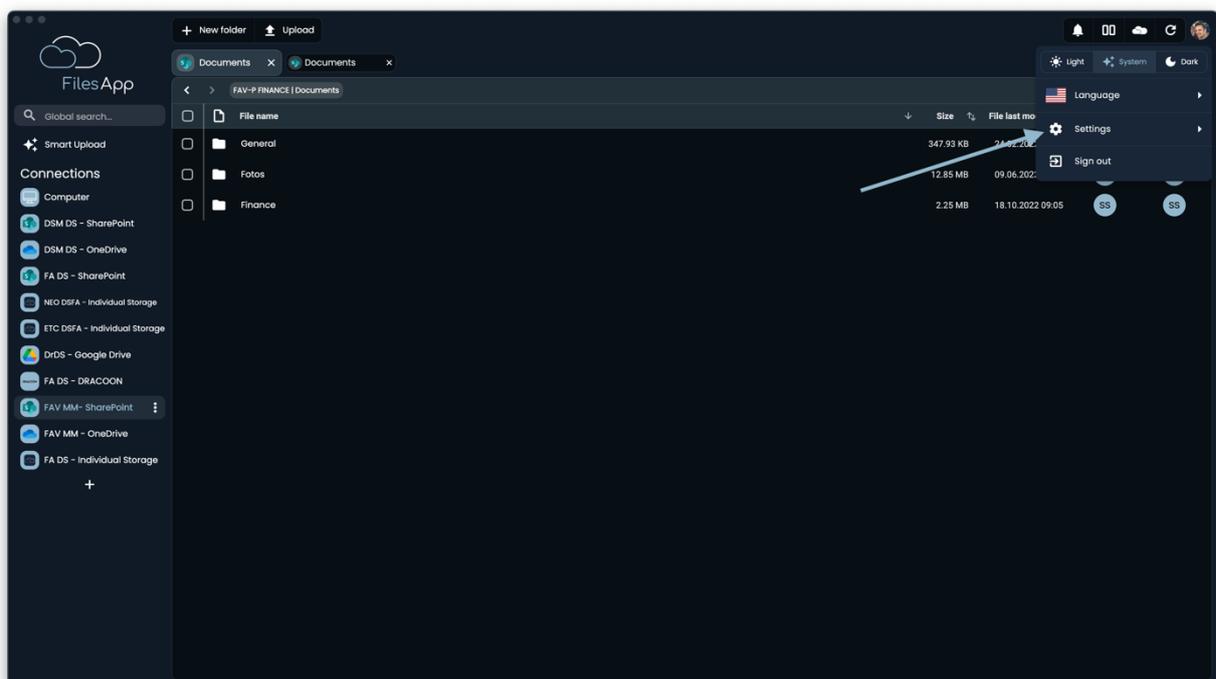
4.3 FilesApp Tags

4.3.1 Tag Configuration

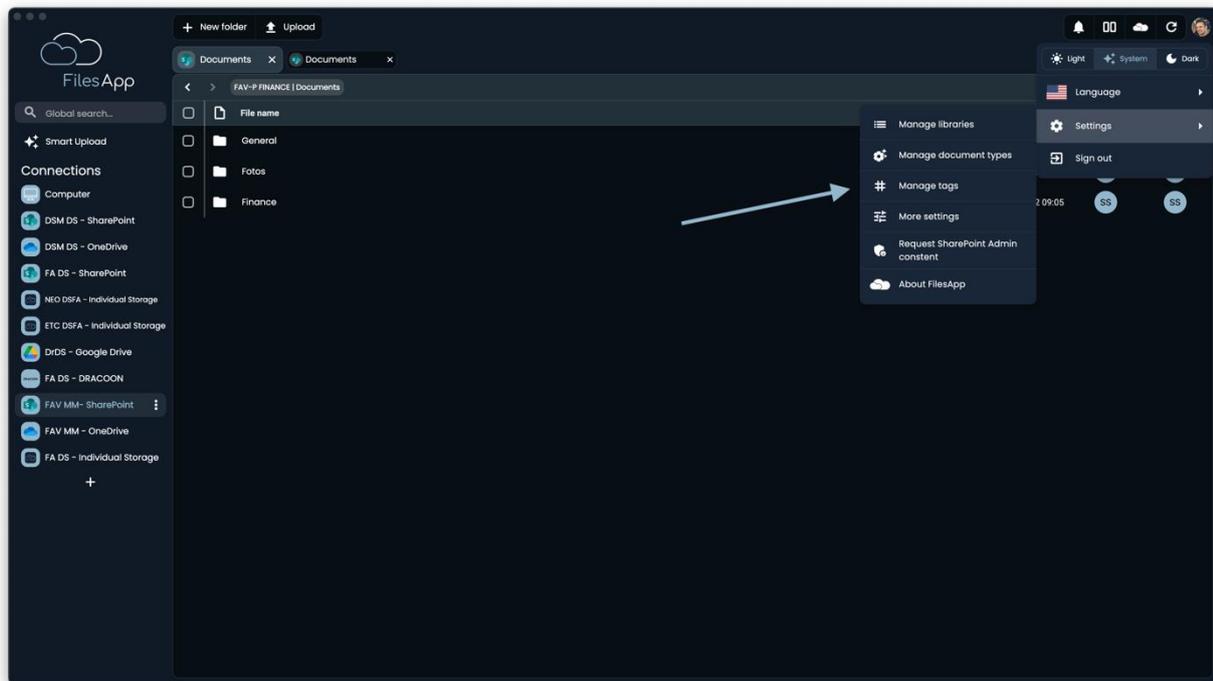
For the creation and configuration of the tags, a separate administration area is available in the settings of the FilesApp Desktop Apps.



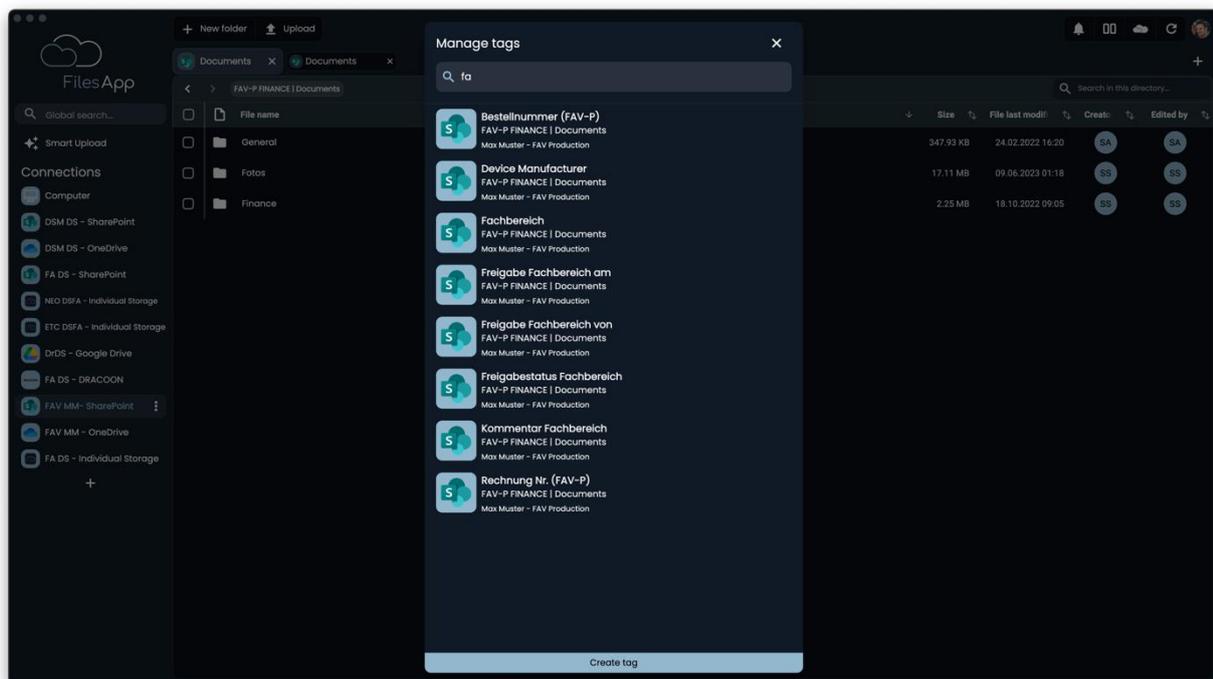
Select the settings area by clicking on the avatar in the upper right corner of FilesApp window.



Select Settings.



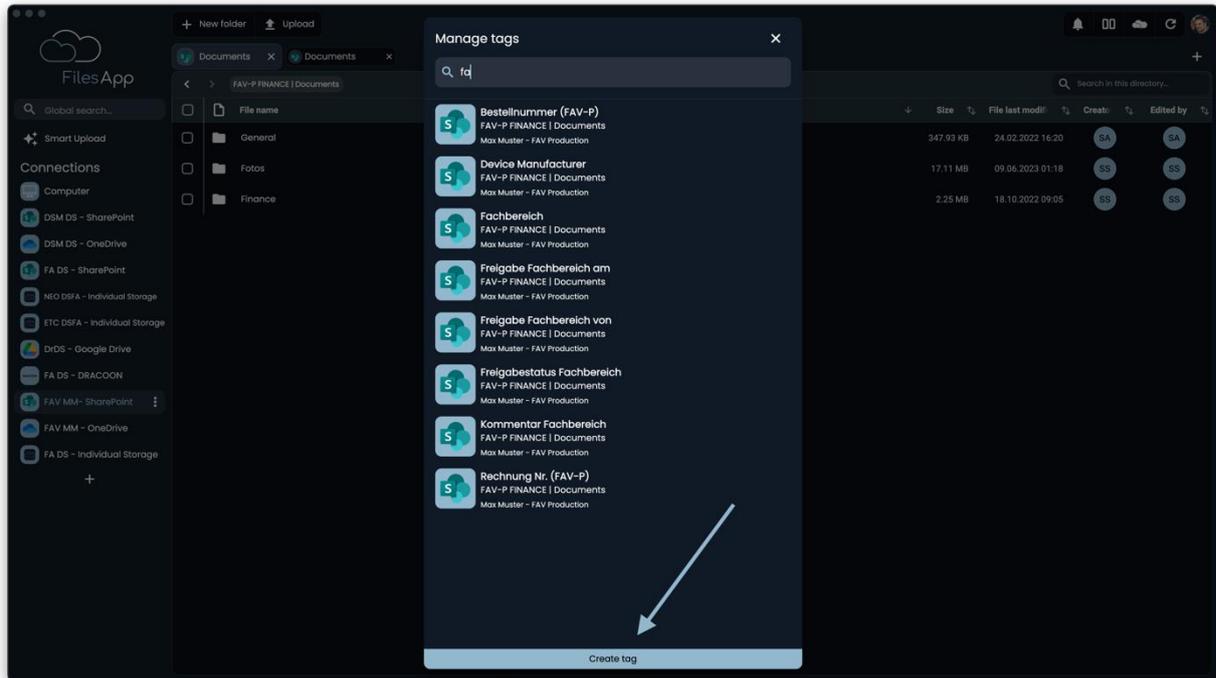
Select Manage tags.



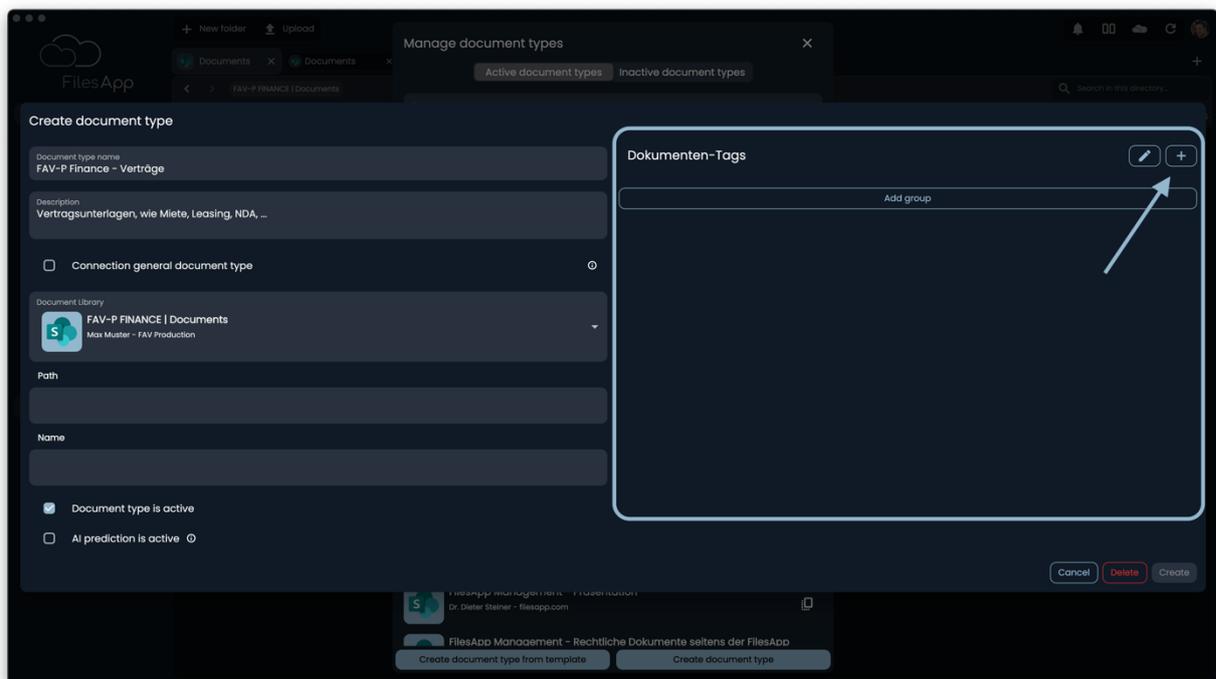
The tags to which the user has access are then displayed and the tags can be filtered via the search field.

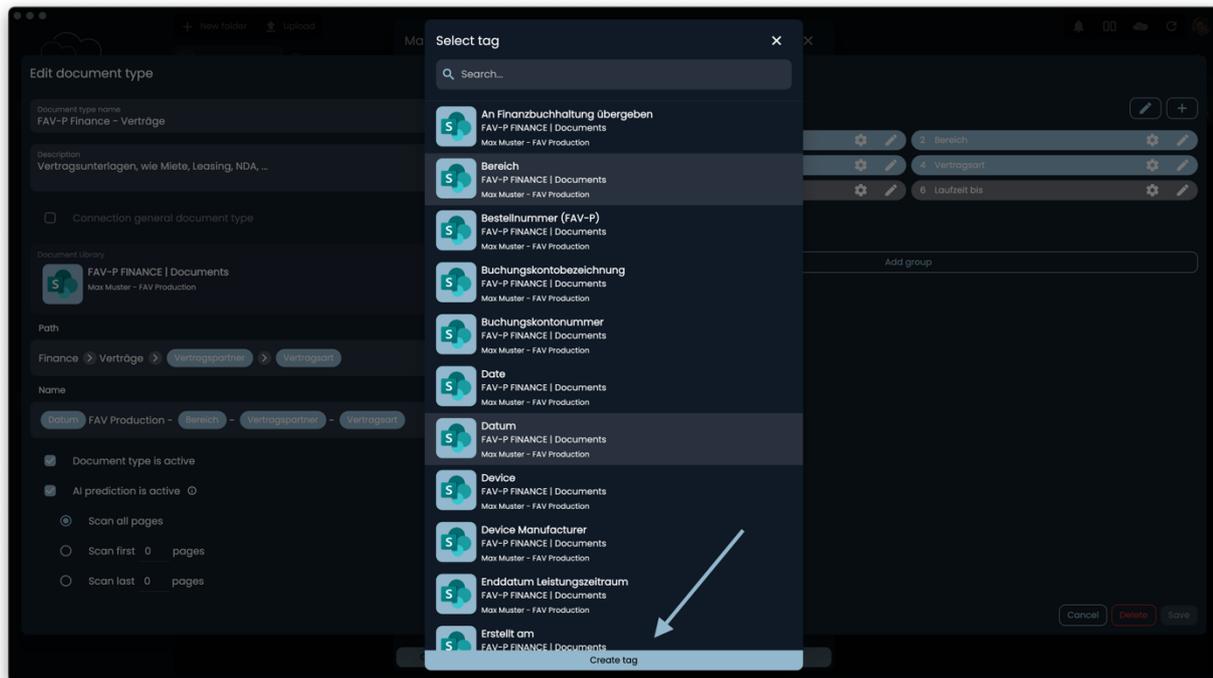
4.3.2 Create Tags

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.





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.

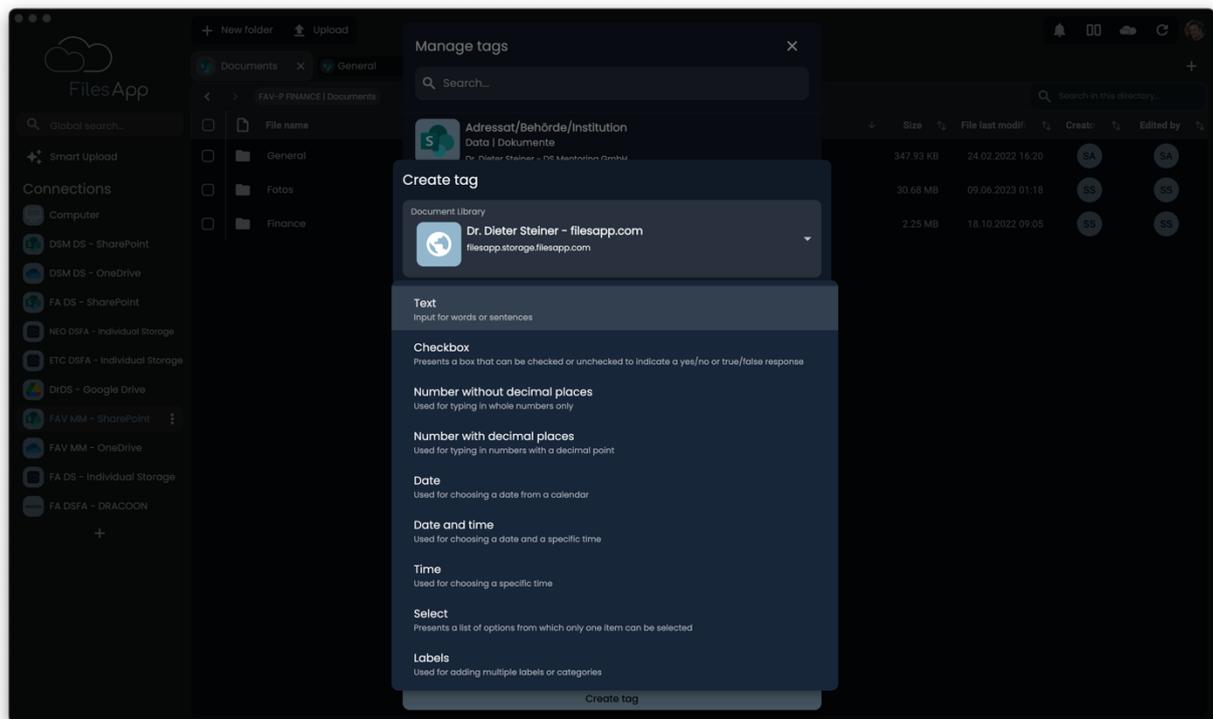
4.3.3 Tag Types

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:

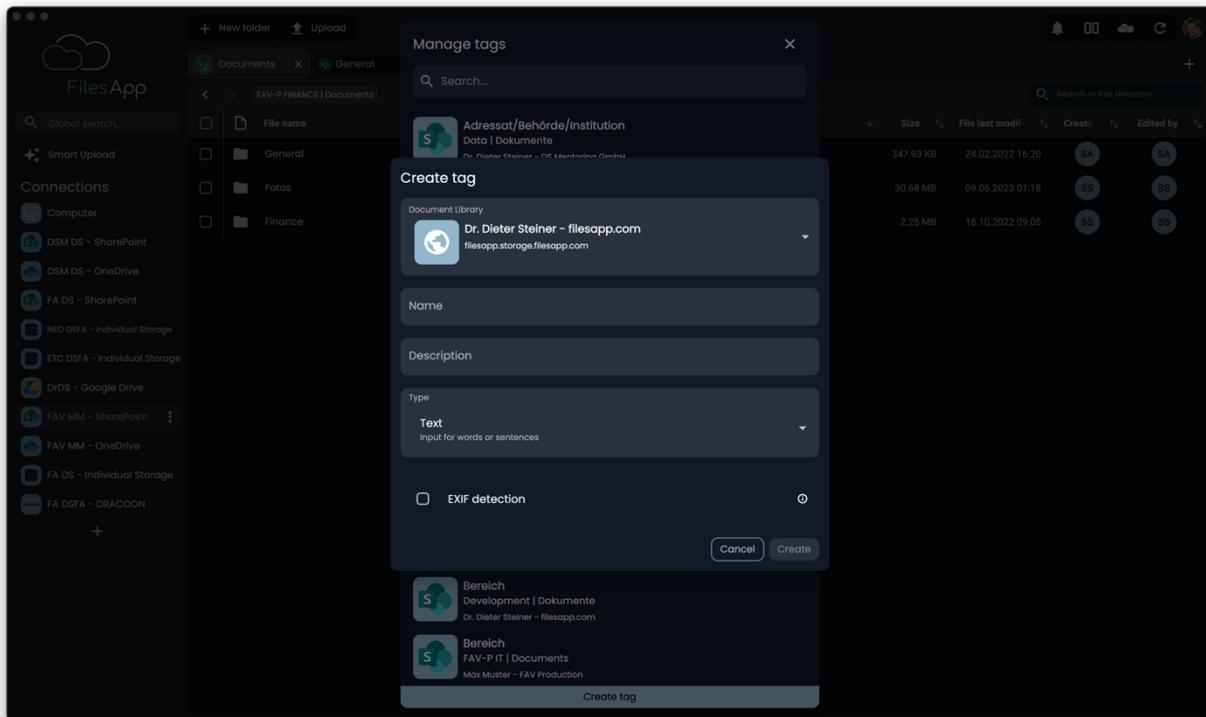


4.3.3.1 Text Tags

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".

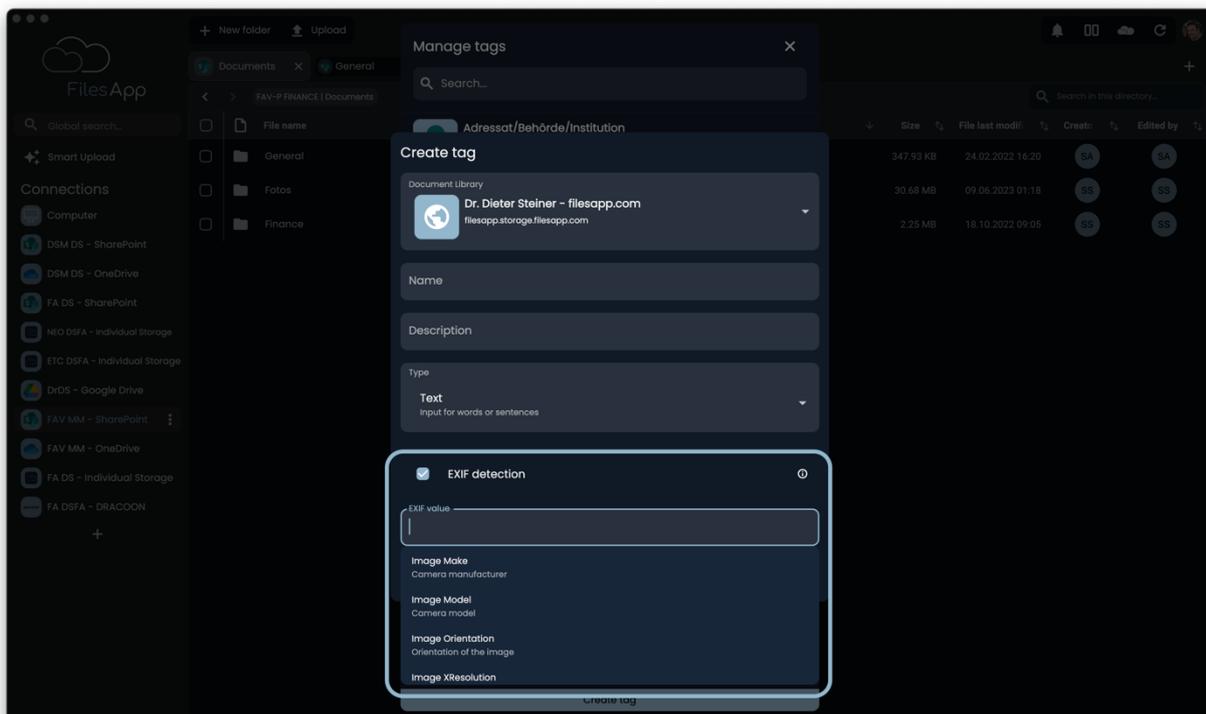


A name and a description can be assigned for each tag.

Text tags can be automatically filled with [EXIF information](#) from the photos by FilesApp AI if desired.

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

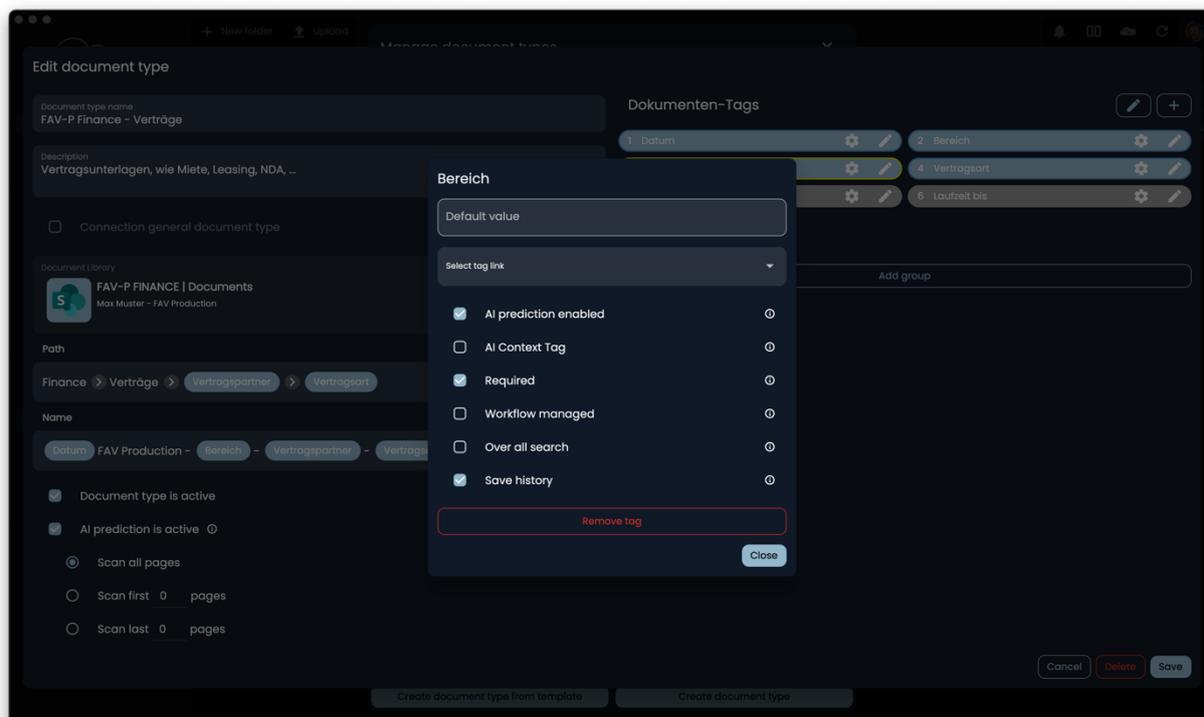
It is recommended that you create your own document types for the Photos section.



4.3.3.1.2 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":



- 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
- 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
- AI 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

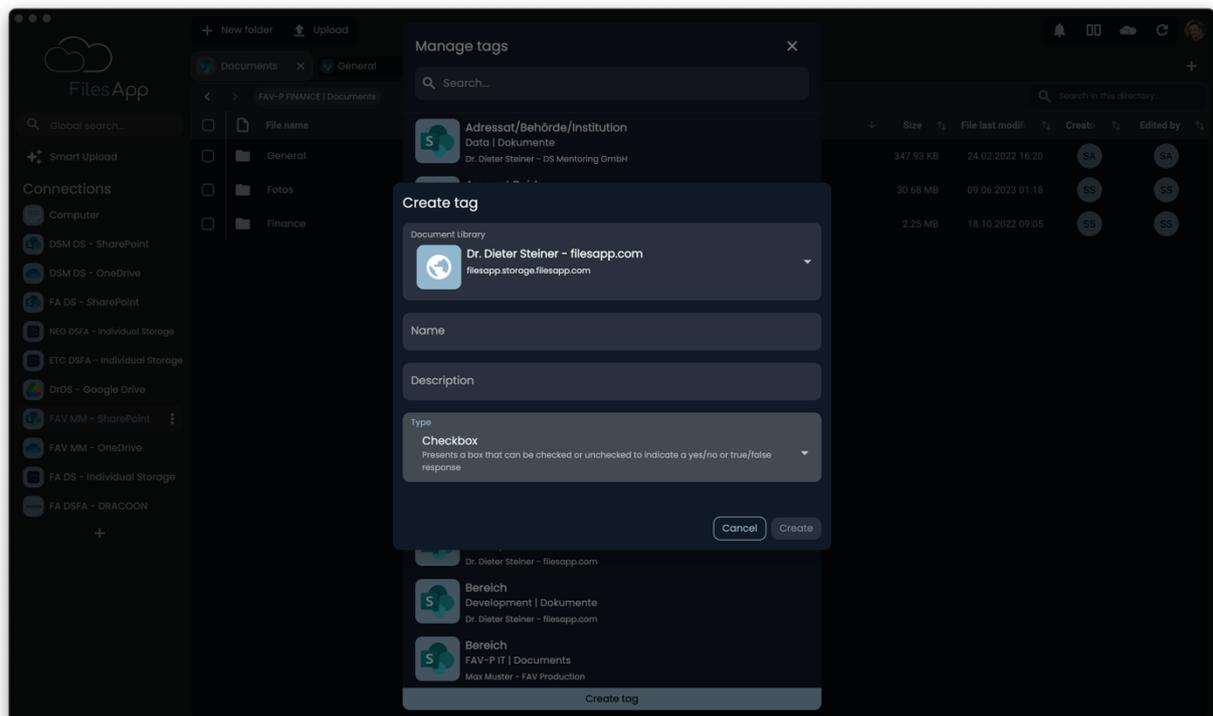
- an example could be that in the case of an incoming invoice from a certain company, an indication is to be made in the document type that is not textually available on the invoice, for example the desired specification of a currency
- Required Tag
 - if this is activated, the content of this tag must 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".

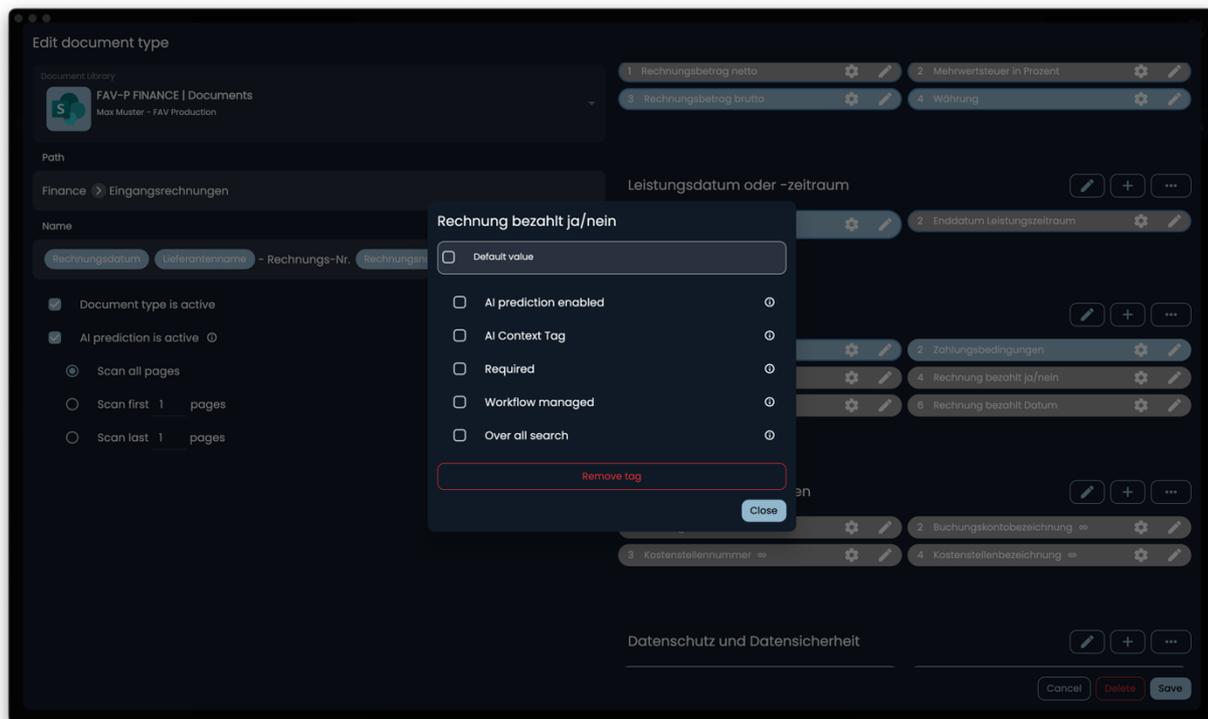


A name and a description can be assigned for each tag.

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":



- **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
- **AI 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

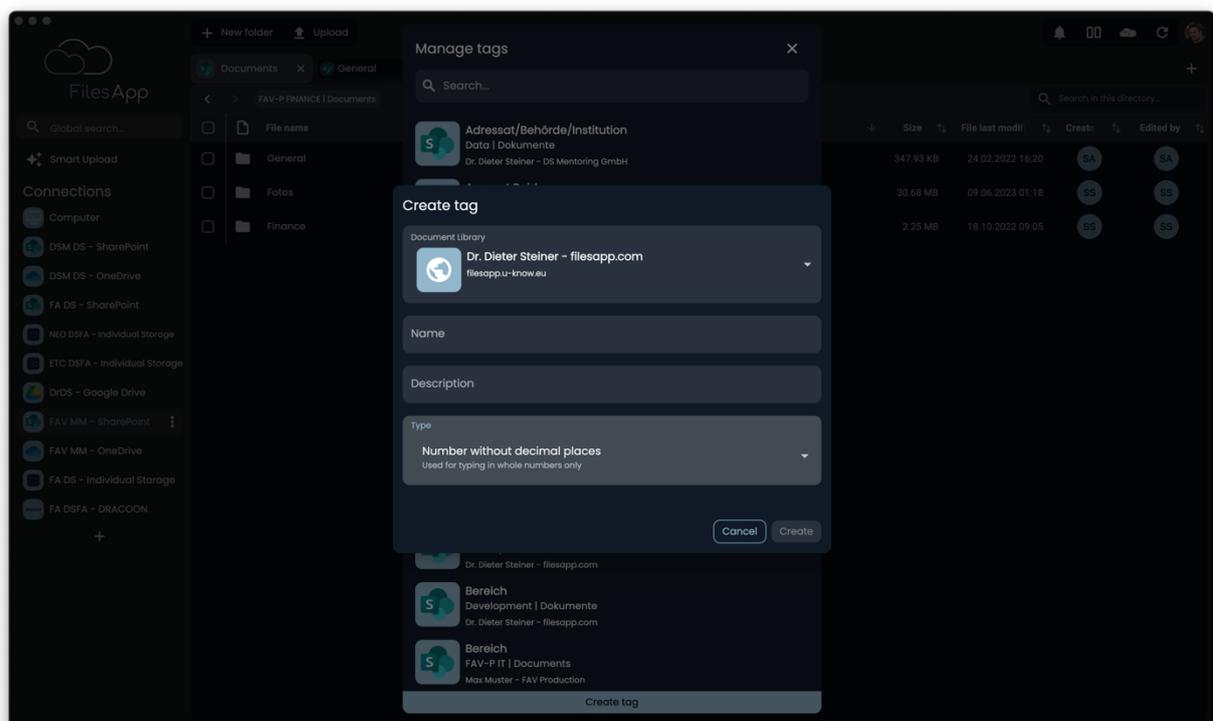
- Remove Tag
this removes the tag from the document type, but does not delete the tag itself

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

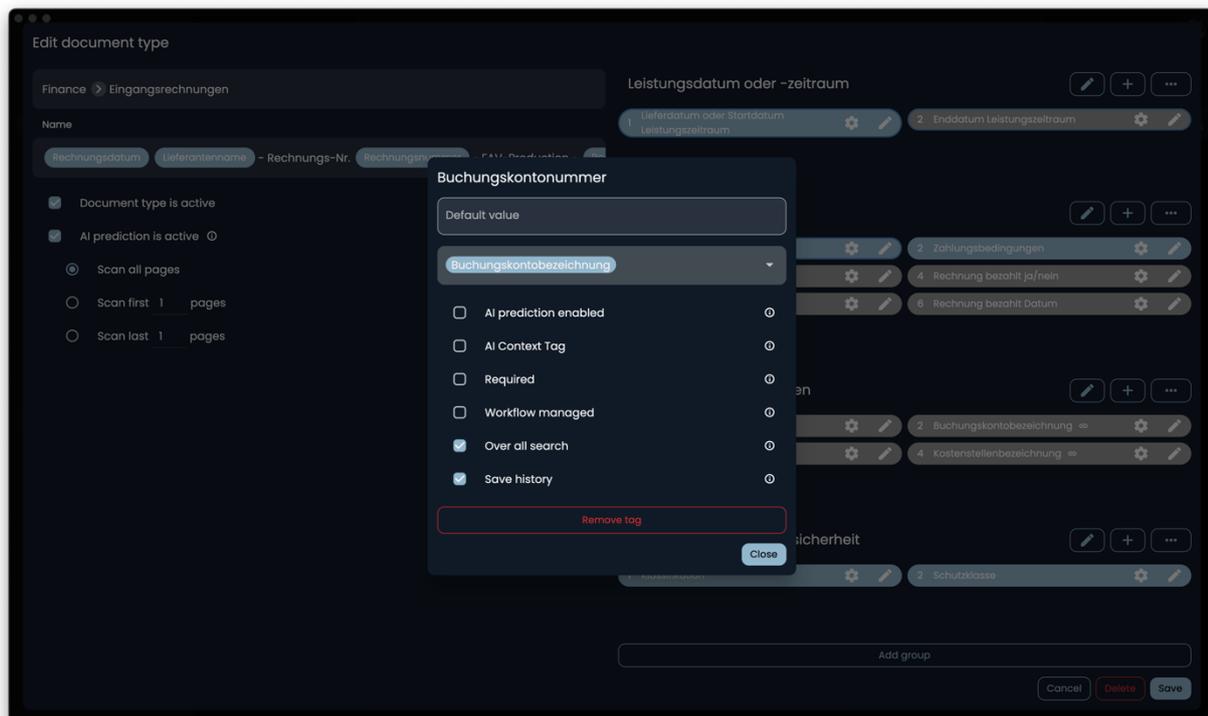
When creating a tag, select the tag type "Number without decimal places".



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":



- 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
- AI 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

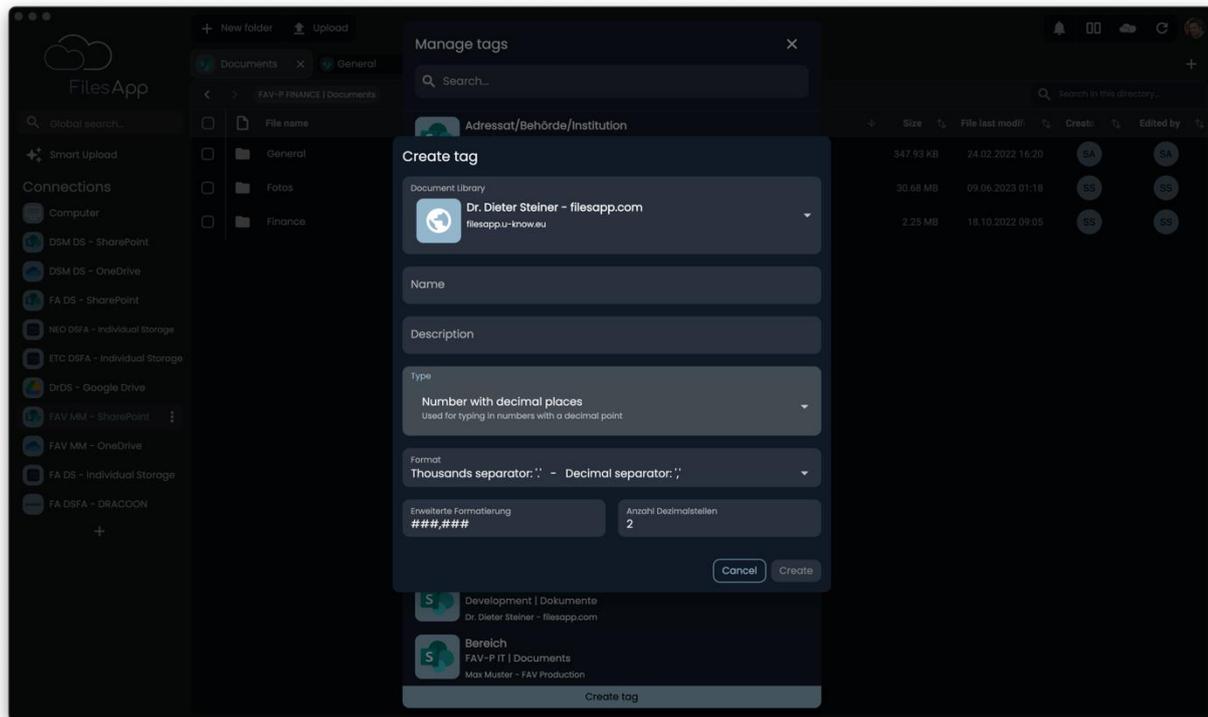
- on the one hand, the color of the tag changes to blue to make this visually clear
- on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
 - this option is used to specify that the content of the tag can only 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".



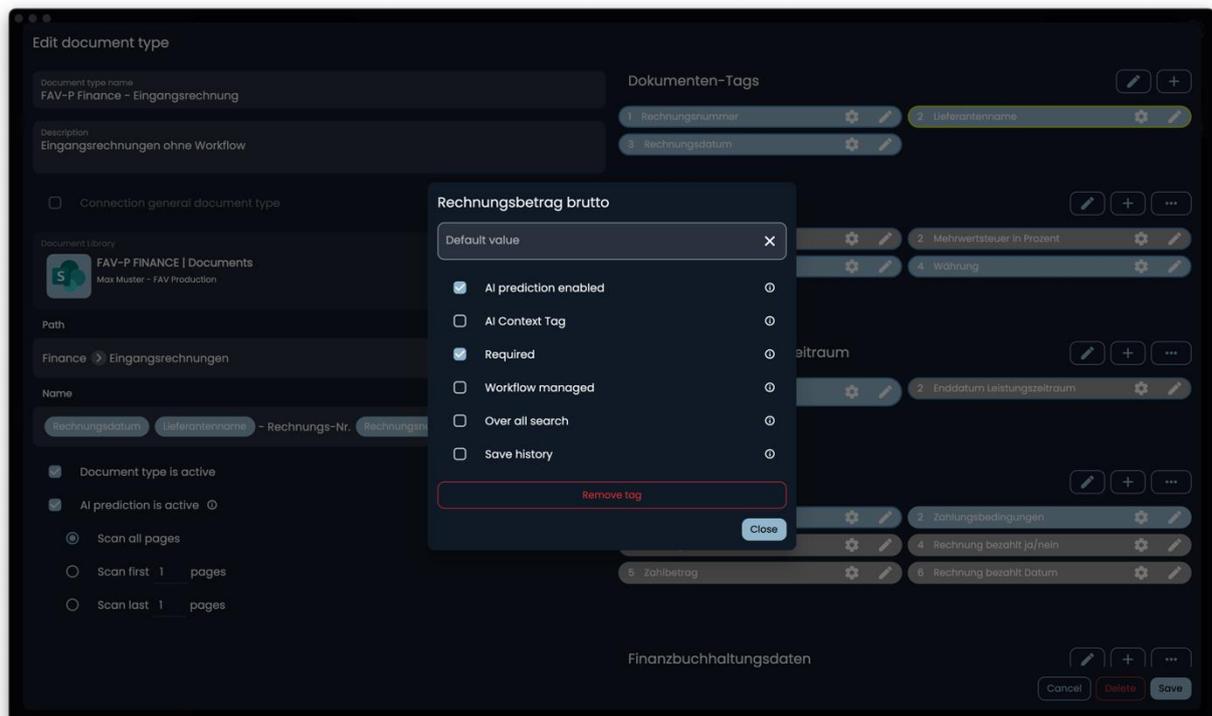
The type of separators, as well as the 1,000 separator and the number of decimal places can be set.

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":



- **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
- **AI 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

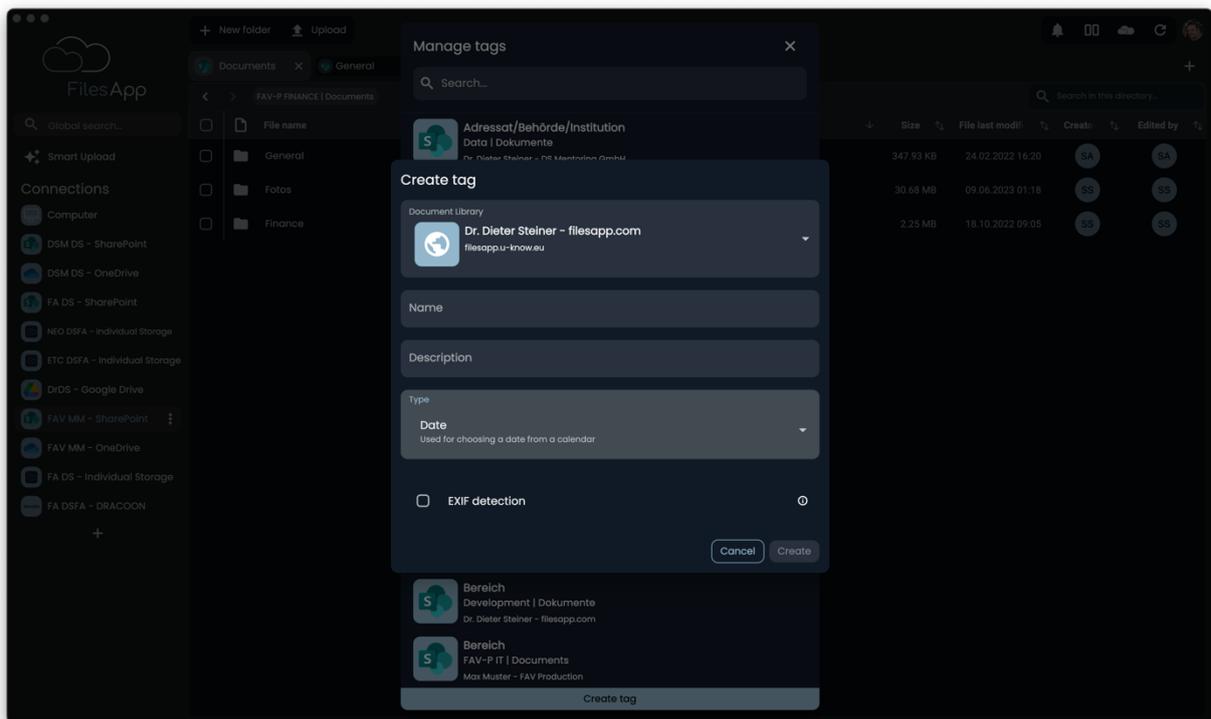
- on the one hand, the color of the tag changes to blue to make this visually clear
- on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
 - this option is used to specify that the content of the tag can only 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".



Date tags can be automatically filled with [EXIF information](#) from the photos by FilesApp AI if desired.

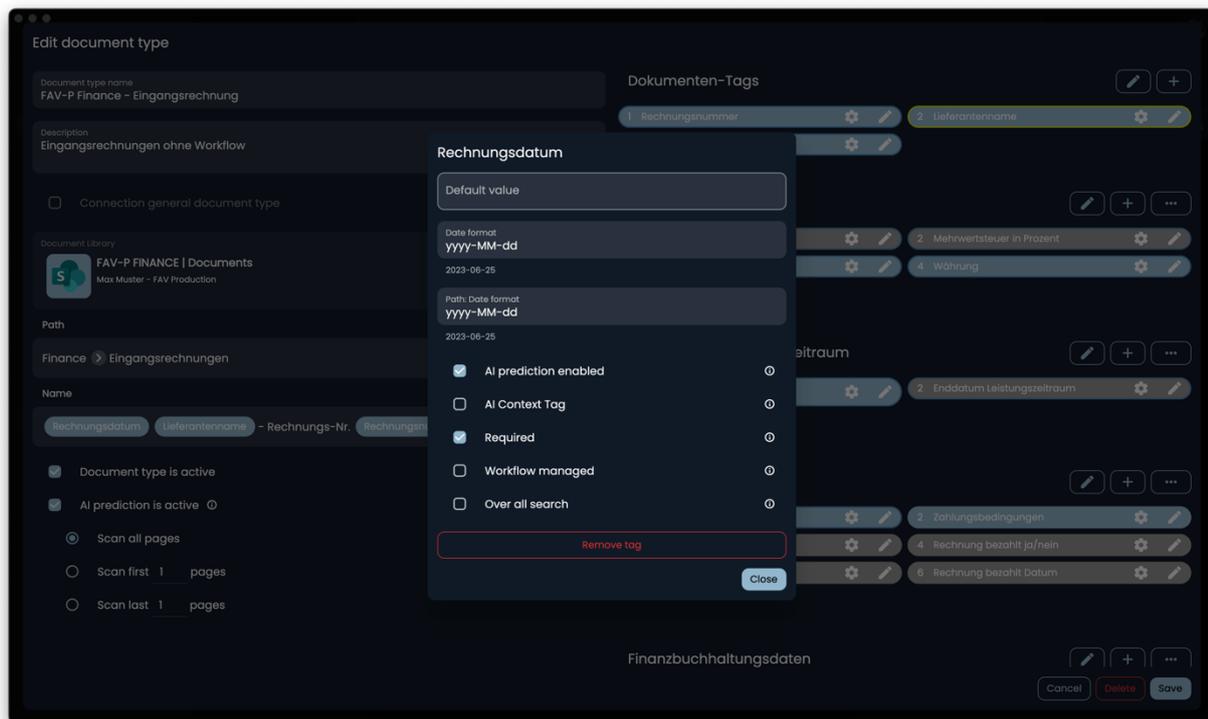
To do this, select "EXIF detection" and select the EXIF field from the list.

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

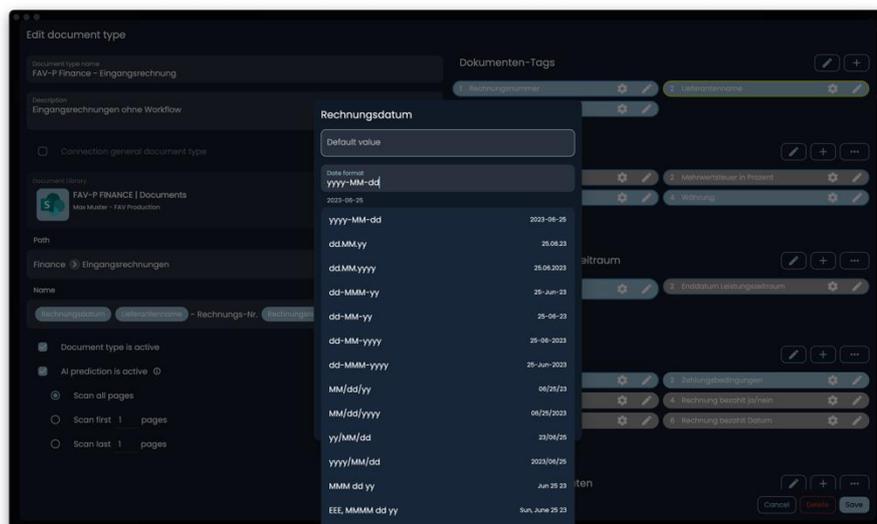
4.3.3.5.2 Date Tag configuration in the Document Type

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":

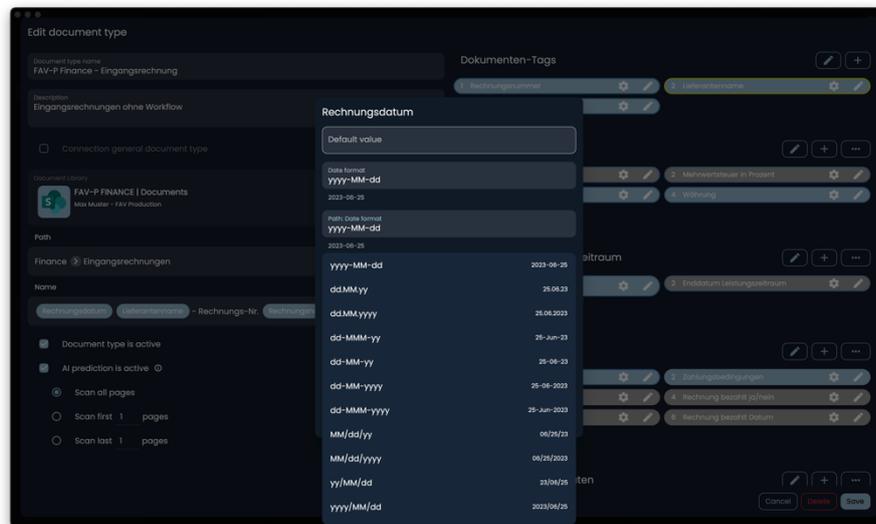


- Default value
a default value for the content tag can be specified here
- Date Format
 - the desired date format can be configured individually
 - Default values are available for selection when the field is activated



- 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



- 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
- AI 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

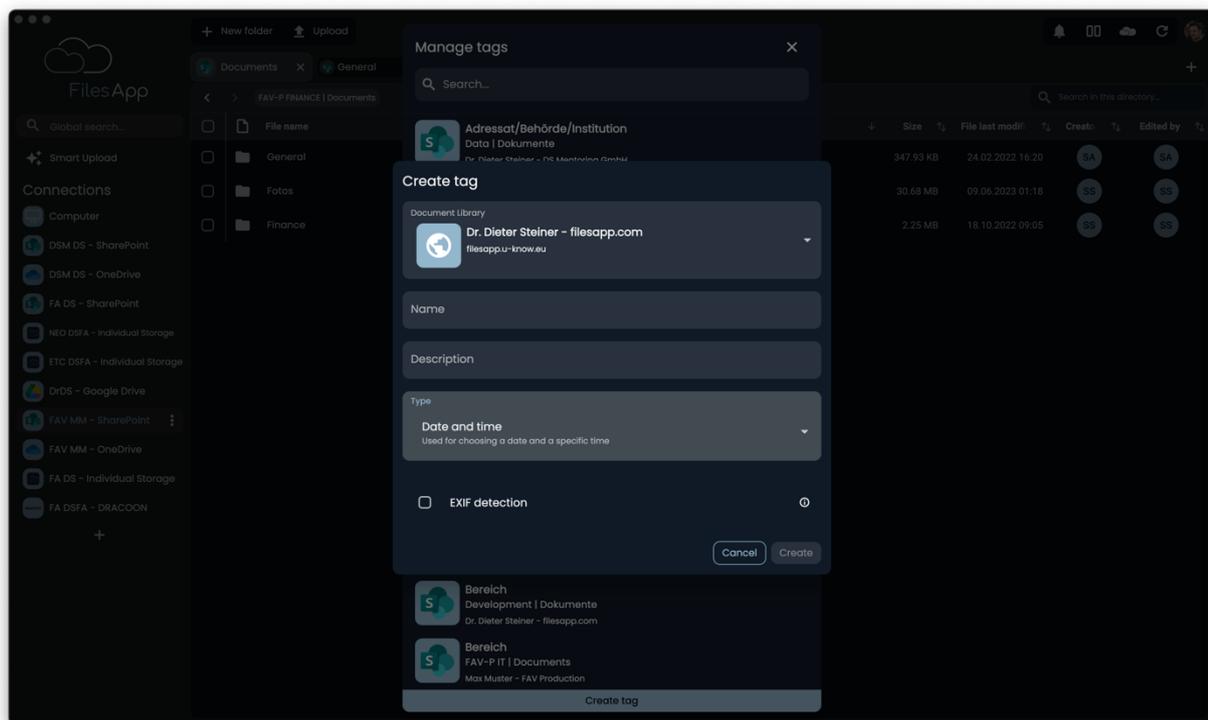
- Search across all document types
if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed and made available for selection during Smart Upload
- Remove Tag
this removes the tag from the document type,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

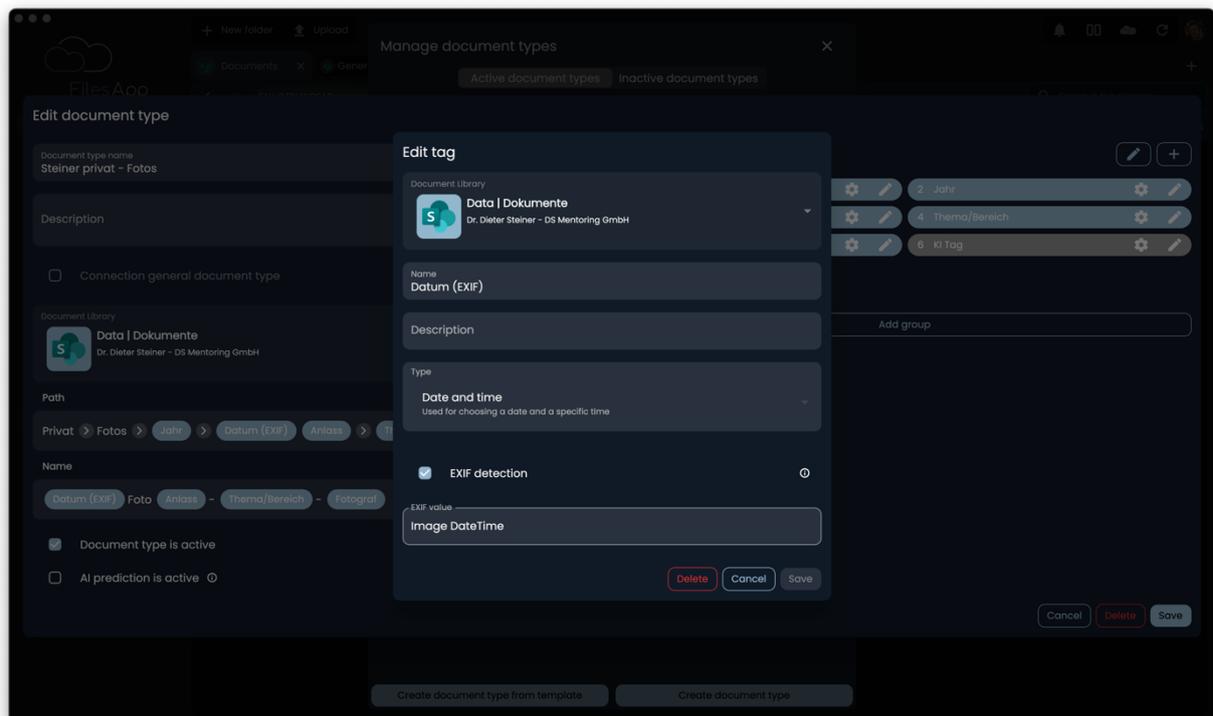
When creating a tag, select the tag type "Date and time".



Date and time tags can be automatically filled with [EXIF information](#) 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.

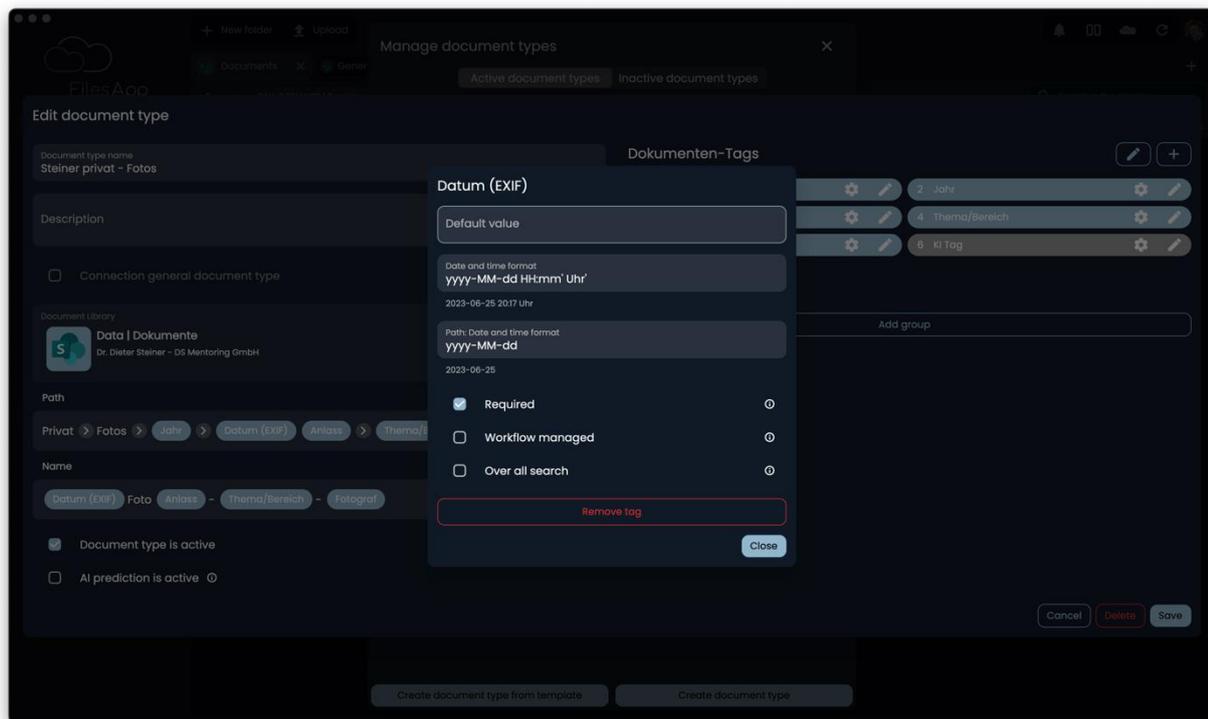


An example with the transfer of date and time from an EXIF information.

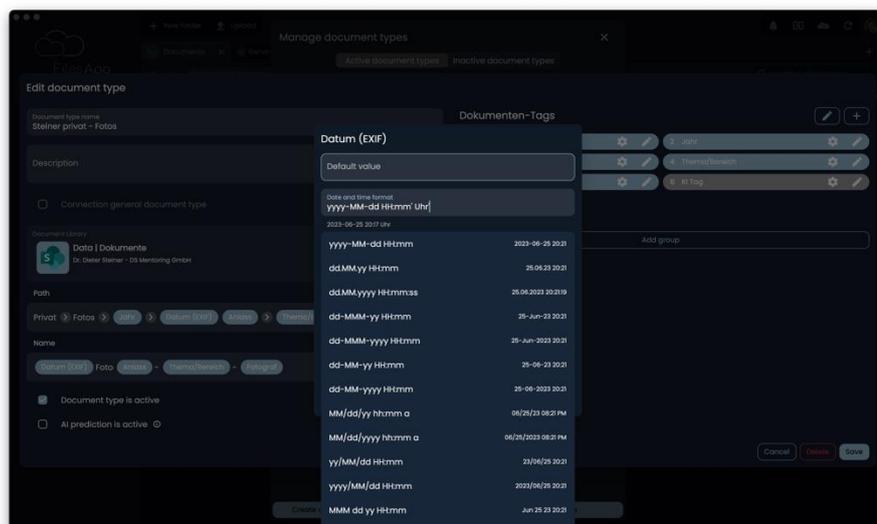
4.3.3.6.2 Date and Time Tag configuration in the Document Type

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)":



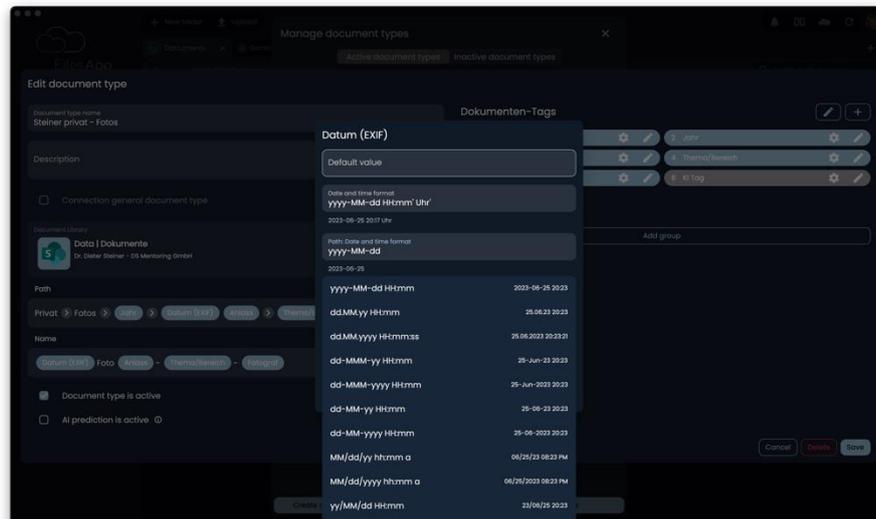
- Default value
a default value for the content tag can be specified here
- Date and time format
 - the desired date and time format can be configured individually
 - default values are available for selection when the field is activated



- 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



- 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
- AI 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

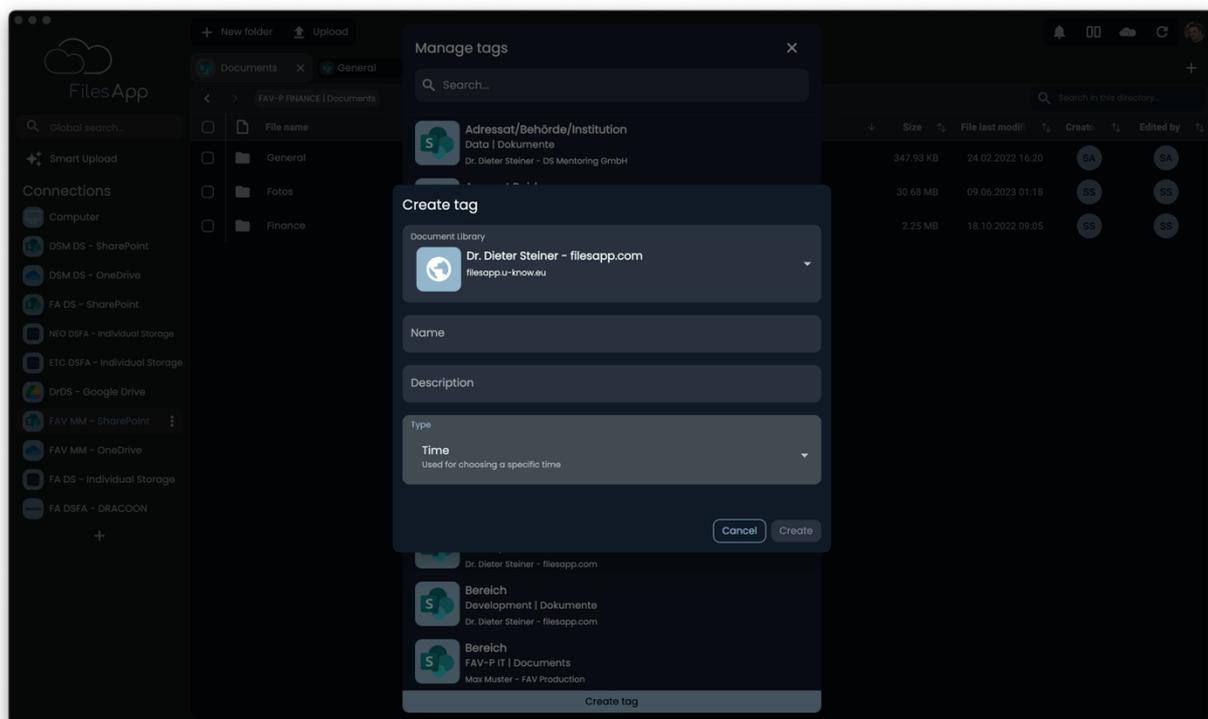
- all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types
if this option is active and the tag is used in several document types, the history of the tag contents from all entries of the document types is displayed 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".



Time tags can be automatically filled with [EXIF information](#) from the photos by FilesApp AI if desired.

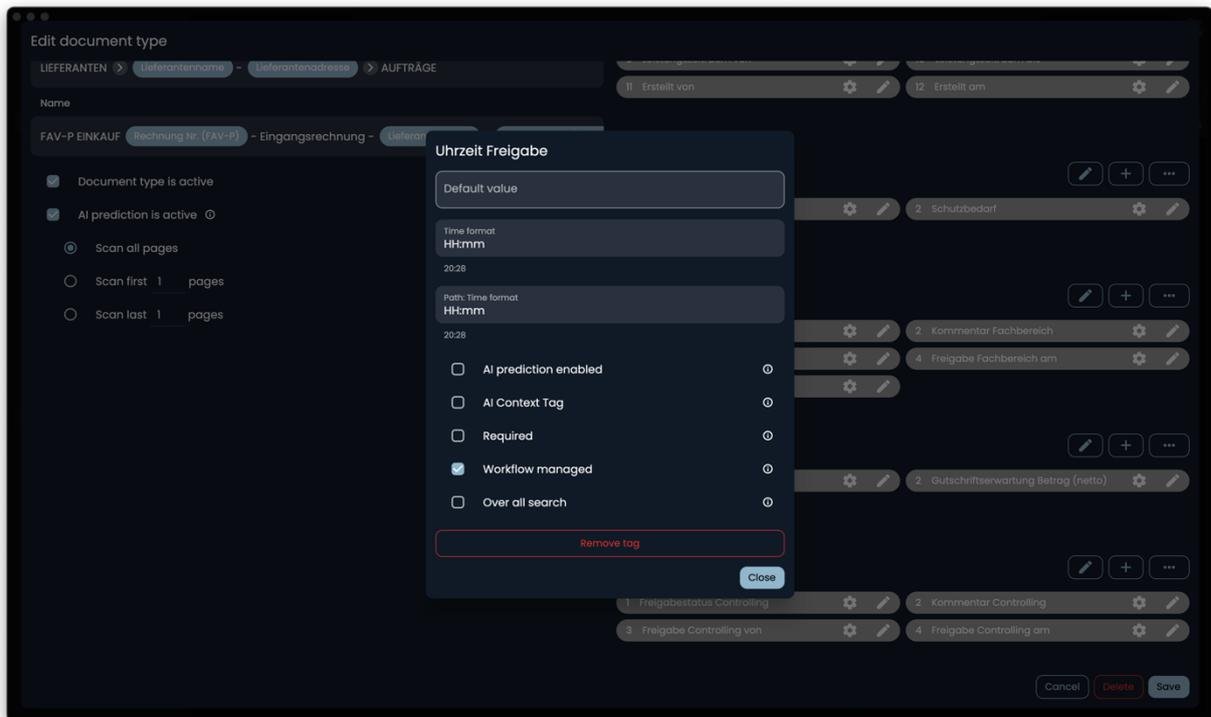
To do this, select "EXIF detection" and select the EXIF field from the list.

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

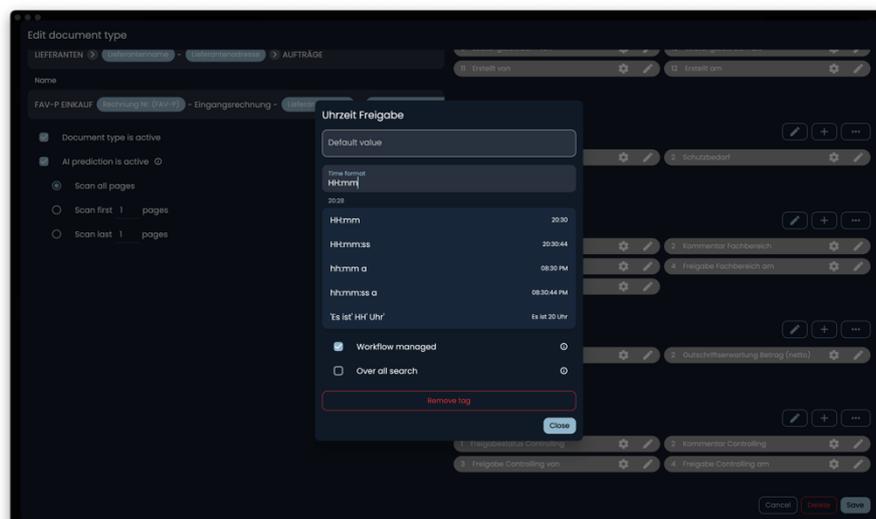
4.3.3.7.2 Time Tag configuration in the Document Type

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

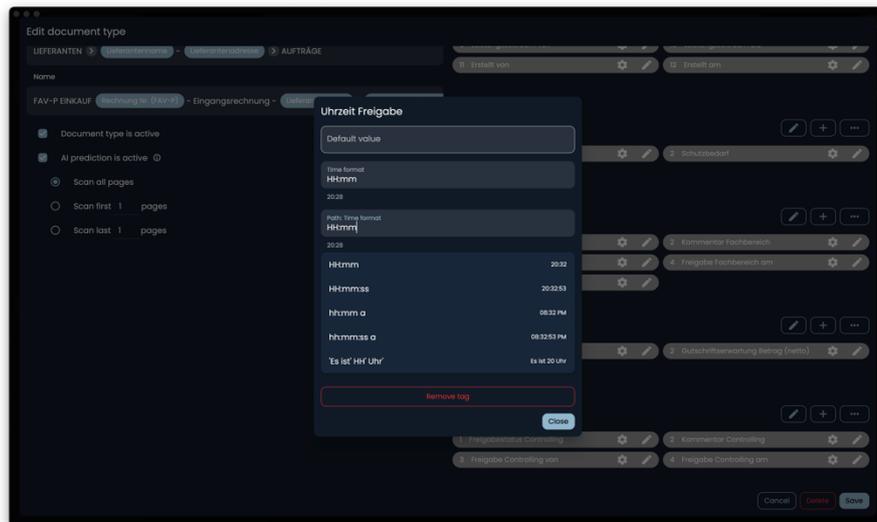
In the example, the time field is labeled „Uhrzeit Freigabe“:



- 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



- 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



- 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
- AI 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

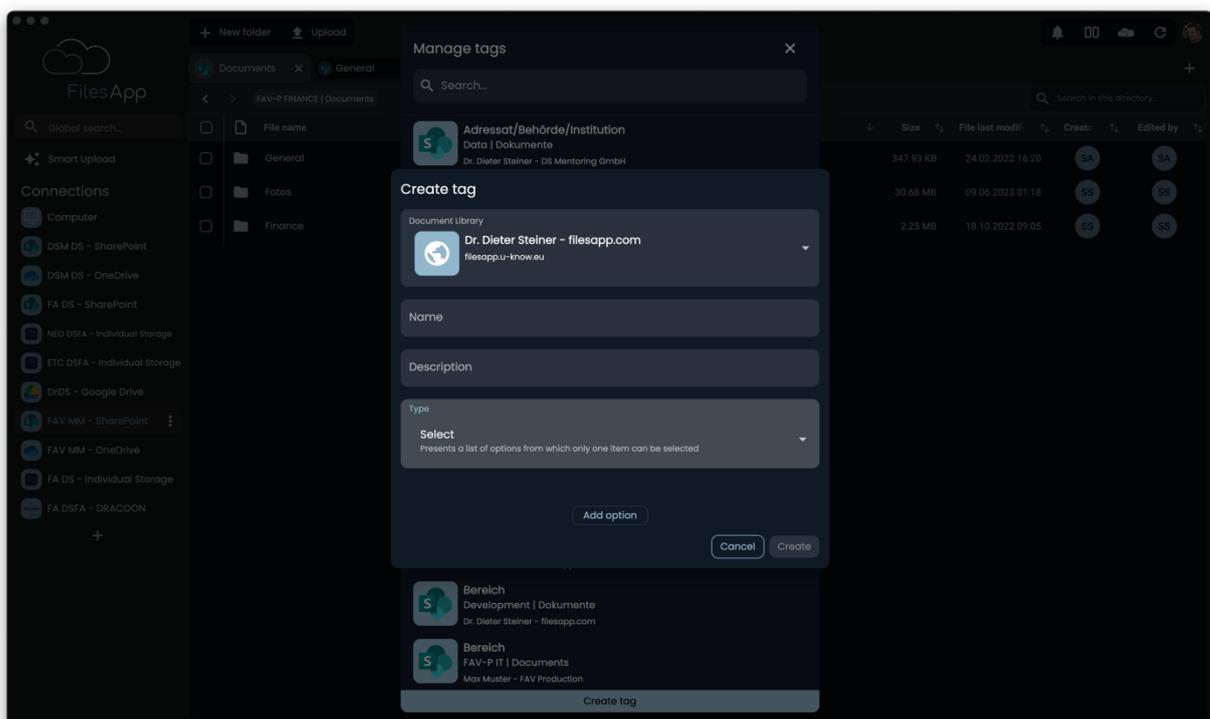
4.3.3.8 Selection Tags

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

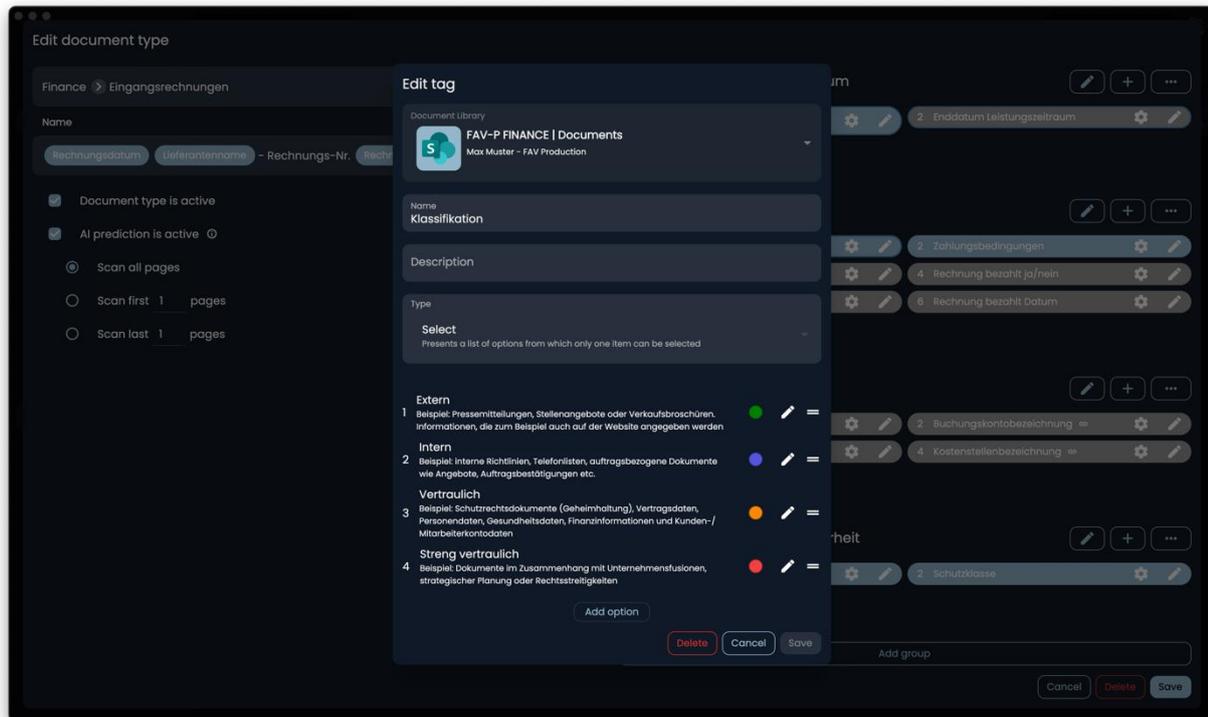
The configuration of the Selection Tags is done after selecting the format during tag creation in the configuration in the document type.

4.3.3.8.1 Selection Tag Creation

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

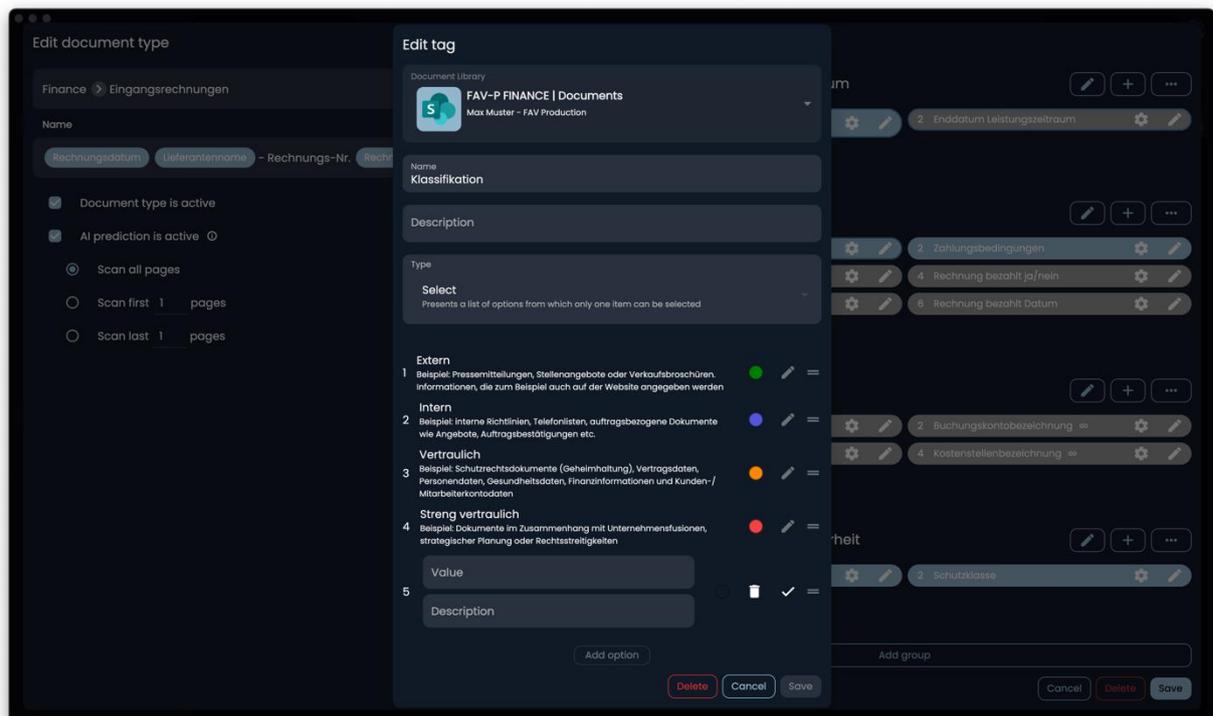


When a selection tag is created and inserted into a document type, the following options are available. In the example, the selection tag is called "classification", as it is used for data privacy, for example:



New options can be specified and described via "Add option", and they can also be color-coded 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.

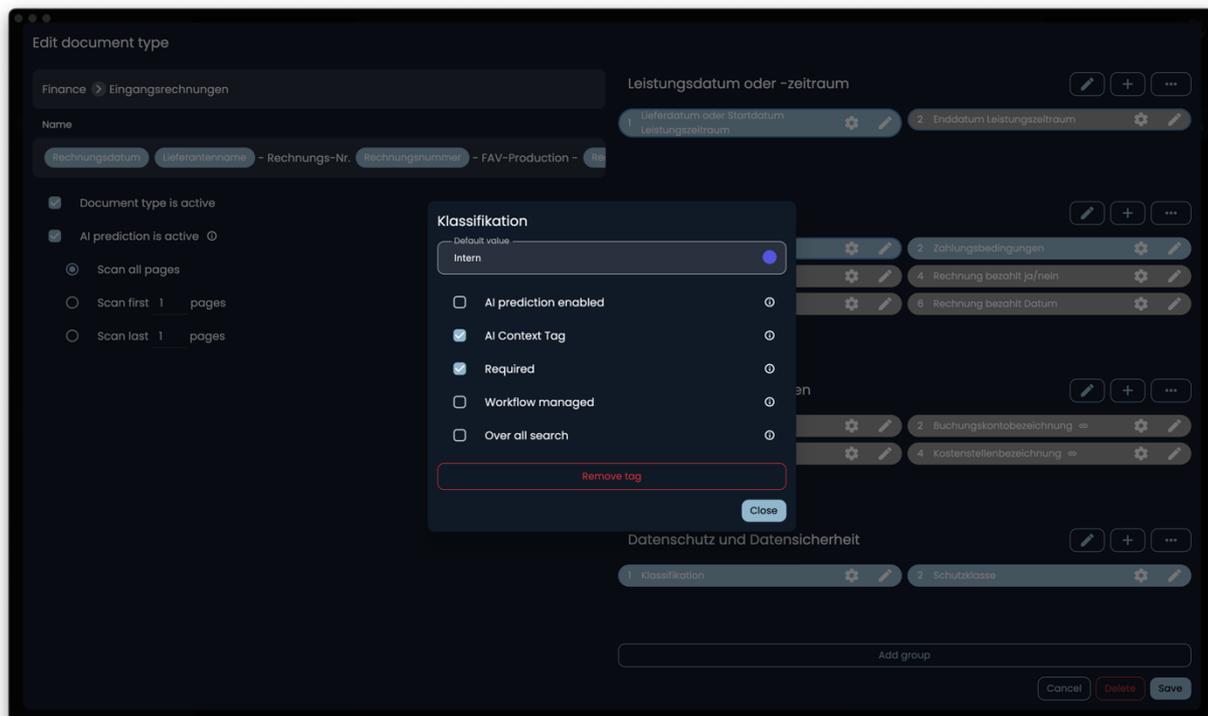


The pencil icon can be used to change an option and the burger icon can be used to arrange the options in terms of order.

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":



- 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
- AI 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

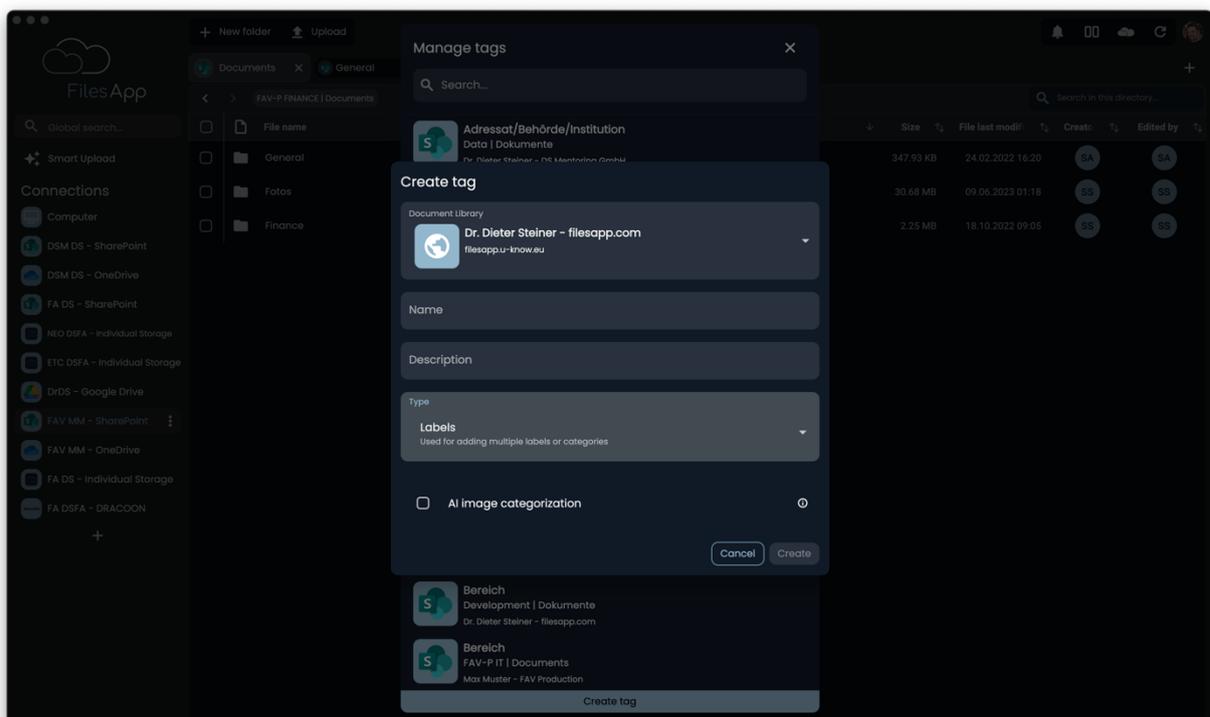
- if this option is activated, the tag content cannot be changed by the users
- all changes to tags are documented per file in FilesApp and are available in the history in an audit-proof manner
- Search across all document types
if this option is active and the tag is used in several document types, 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".



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

To do this, select "AI Photo Categorization".

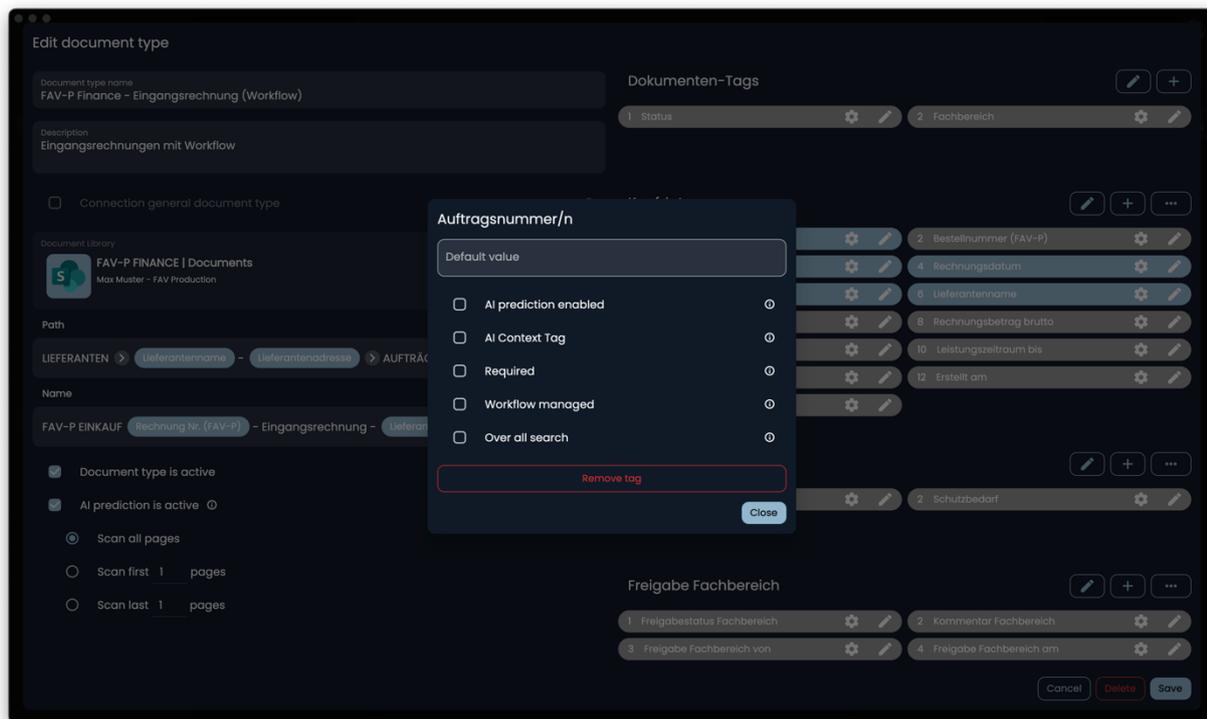
As a result, the AI writes further information into this label tag that is recognized in a photo, for example dog, cat, mouse, house, people, etc.

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“:



- 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
- AI 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

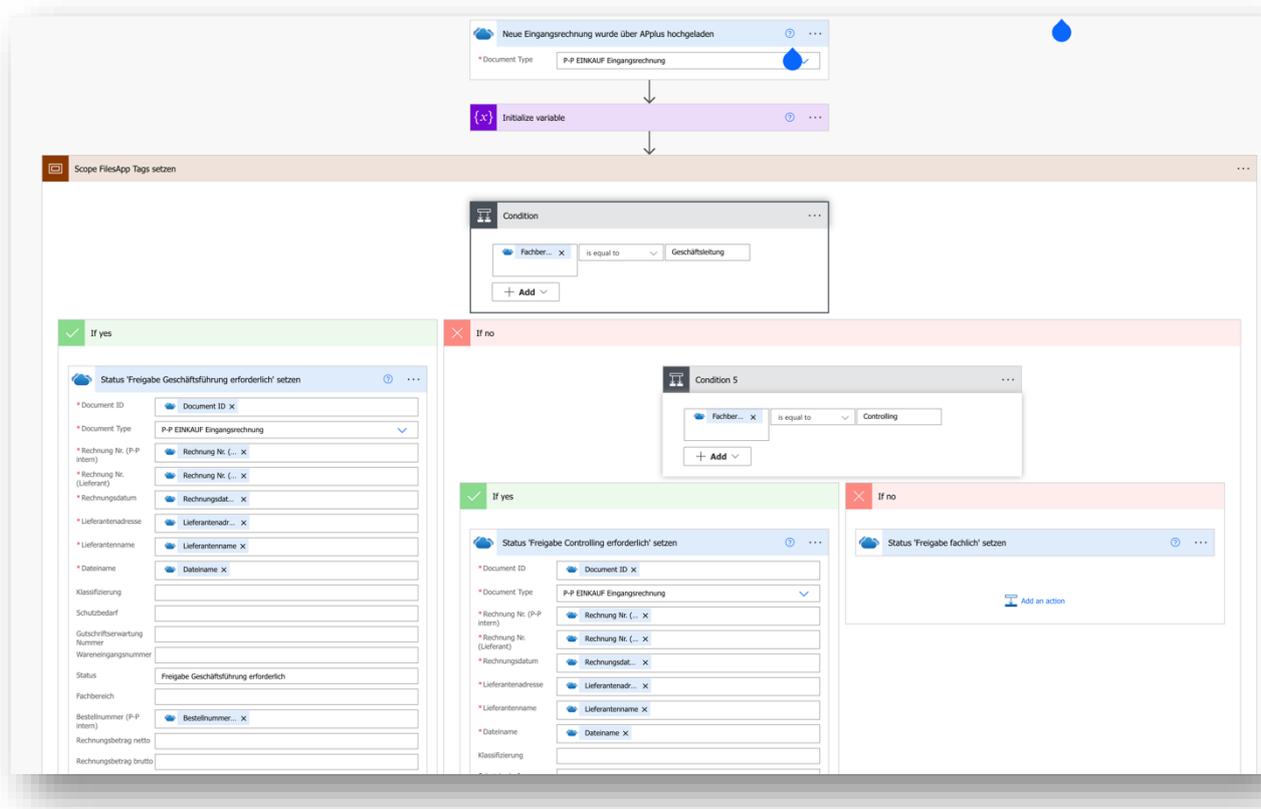
- on the one hand, the color of the tag changes to blue to make this visually clear
- on the other hand, a required tag can be used as a variable for automatic creation and assignment to directories and file names
- Workflow Managed
 - this option is used to specify that the content of the tag can only 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.



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 support@filesapp.com.

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.

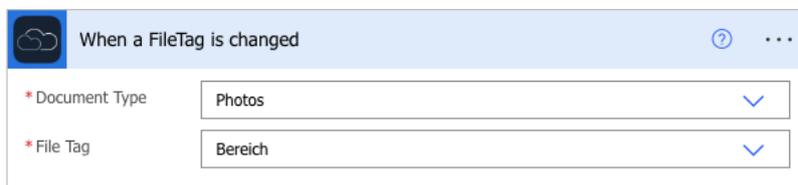
For example, in office management, a workflow can be triggered, which is executed when a user in the accounting department sets a certain tag for the file for it in FilesApp, and this file is then moved to another directory. The users who trigger this workflow will need a FilesApp Business Professional 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 FileTag is changed	
* Document Type	Photos
* File Tag	Bereich

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 document is uploaded via FilesApp Smart Upload

* Document Type: FAV-P Finance - Eingangsrechnung

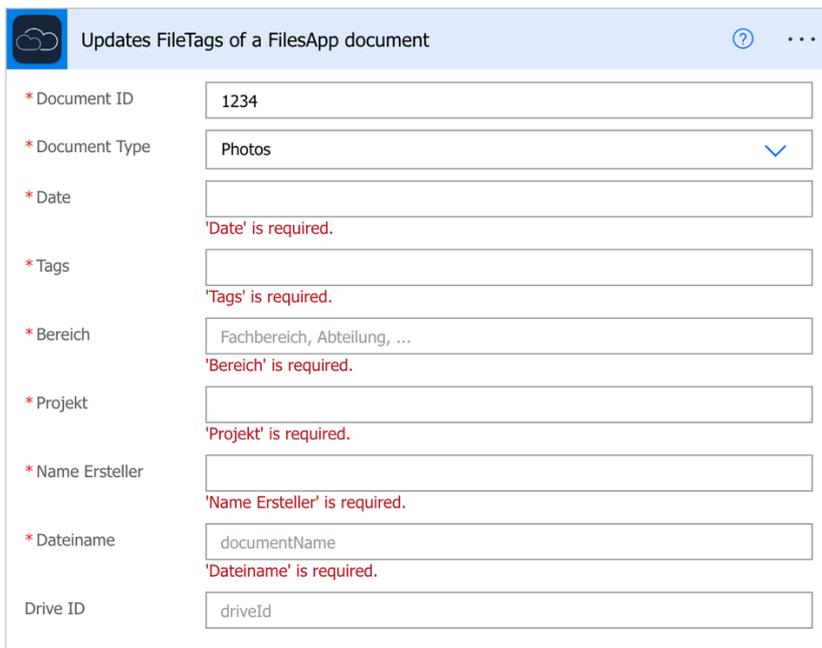
5.3.2 FilesApp Power Automate Flow Actions

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 FileTags of a FilesApp document

* Document ID: 1234

* Document Type: Photos

* 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.

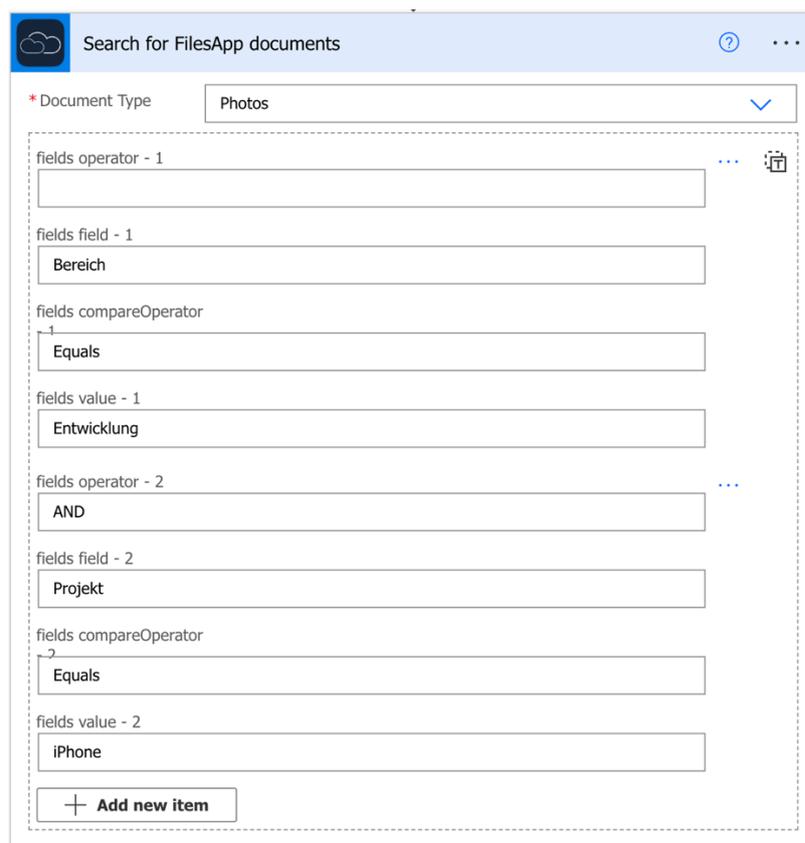
The choice of the document type for the search is mandatory. Subsequently, one or more filter operations can be added.

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



The screenshot shows a search configuration window titled "Search for FilesApp documents". At the top, there is a "Document Type" dropdown menu set to "Photos". Below this, a dashed box contains a list of search criteria:

- fields operator - 1**: An empty text input field.
- fields field - 1**: A text input field containing "Bereich".
- fields compareOperator**: A dropdown menu with "1" selected and "Equals" displayed.
- fields value - 1**: A text input field containing "Entwicklung".
- fields operator - 2**: A dropdown menu with "AND" selected.
- fields field - 2**: A text input field containing "Projekt".
- fields compareOperator**: A dropdown menu with "2" selected and "Equals" displayed.
- fields value - 2**: A text input field containing "iPhone".

At the bottom of the dashed box is a button labeled "+ Add new item".

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.

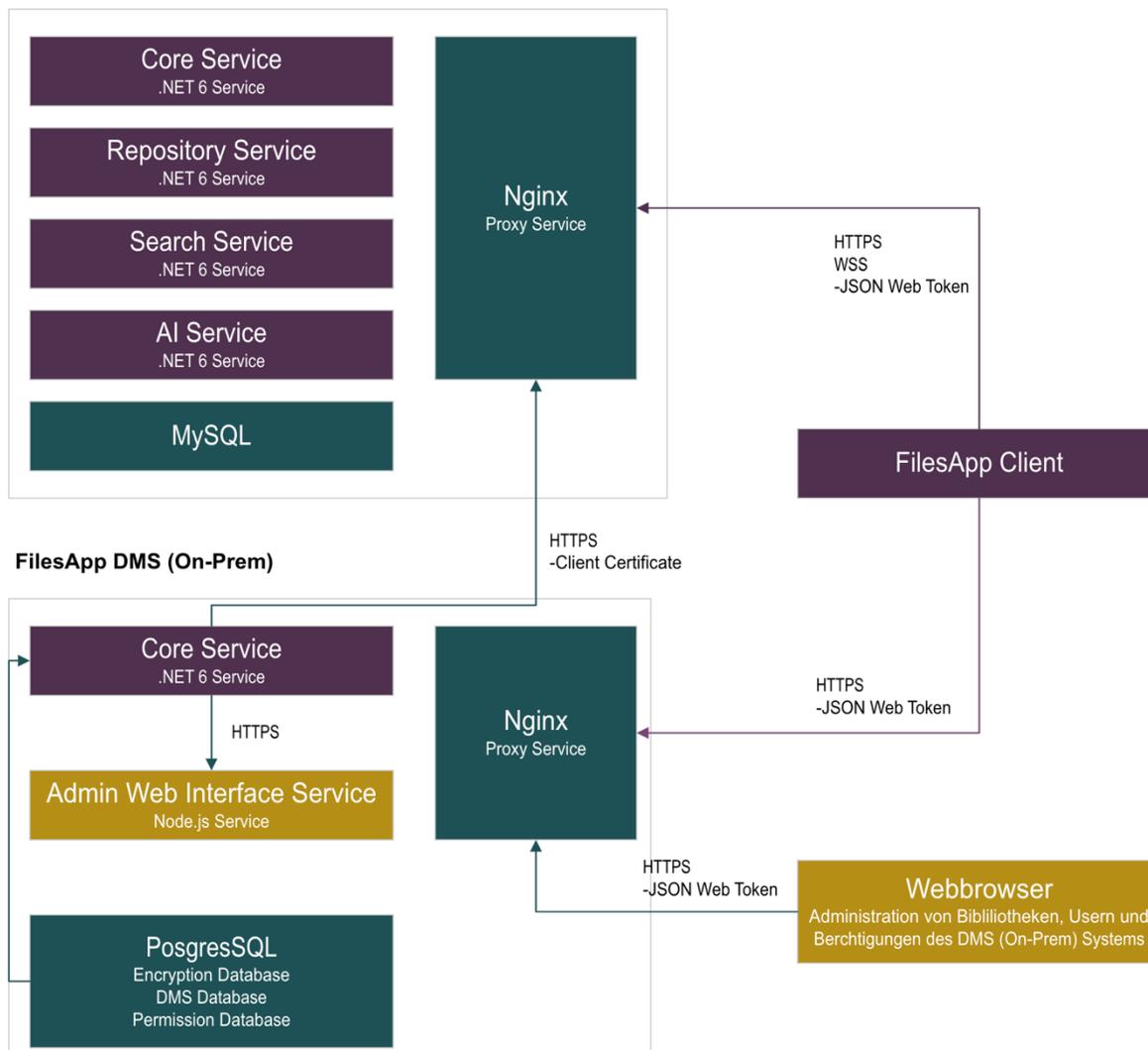
The FilesApp AI Service, based on ML.NET, provides state-of-the-art machine learning capabilities. It is able to train AI models based on tagged documents and thus recognize document types and tags in files.

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 back-end.

FilesApp Cloud Service



6.2 FilesApp AI

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 AI 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 support@filesapp.com.

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 support@filesapp.com.

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 support@filesapp.com.

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 support@filesapp.com email address <mailto:support@filesapp.com>.

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.