Wolters Kluwer

winra- Corporate Legal Department Software

What's new in Version 6.4?

User Guideline

winra

Business Unit Legal – Legal counsel

Date   April 2020

Version   winra Version 6.4, 2020.04

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Business Unit Legal – Legal counsel

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1   Introduction

Dear customers,

welcome to our new winra-Update. This update offers you numerous new and useful functions, which are described in this handout. These are e.g.:

- Saved mails can also be marked as categories in Outlook.
- Improved handling of encrypted e-mails:
  - If an e-mail is to be saved in encrypted form, there is a warning message.
  - If an e-mail is stored encrypted, it will be displayed in an additional column in the file history, history favorites and the history box.
  - Function to check already saved e-mails for encryption
- Remark fields in the file can contain formatted text and links.
- There is a new type of web link in the file history. A double-click opens the link in the default browser.
- Categories and category profiles can be changed in the file.
- Winra fields can be inserted into Word headers and footers.
- Update of the ABBYY-OCR component with significantly improved recognition rate.
- The beA functionality has been significantly expanded:
  - In the beA-search dialog, entries can be added to and deleted from the personal address book.
  - New beA health check, which checks the beA configuration and indicates any problems.
  - New dialog for displaying all active beA authorizations.
  - If messages from the beA are assigned to a record, they are moved to the assigned folder of the winra mailbox. This also happens with other users who have the same message in their inbox.
  - In the portal the messages can be grouped, e.g. by recipient.
  - If messages from the beA are assigned to a record, the messages from the beA inbox can be moved to a winra subfolder. (Configurable)
  - A new HTML view is available for structural data record and confirmations.
  - A beA Safe ID can be entered for a winra contact. In the record participations, a new message with the participant as the recipient can be created using the context menu. In the search field for beA recipients all participations with a safe ID are displayed separately. (Provided a record is assigned by the call from a record).

      o   File names for attachments are checked and can be adjusted in one go.

We are also pleased to be able to provide you with security improvements with this update. The compatibility to the new database driver OLE DB Driver 18 (MSOLEDBSQL) from Microsoft is guaranteed and should be used to use the latest SSL technology for transport encryption. Details can be found in the current installation guide, which can be downloaded from the winra customer portal. The administrative tools have been removed from the winra client (WinraAdmin.exe, DBViewer, Config-Editor) The database password is no longer kept in memory unnecessarily.

Version 6.4 includes an update for ABBYY-OCR recognition (SDK version 12). New licenses are required for this. These were automatically sent to all customers who booked the OCR package. Please follow the installation instructions: The ABBYY license server must also be updated.

Please let your IT install the update at short notice! In addition to the program improvements described below, we have also fixed small bugs and improved performance and stability.

If you have any questions, our support will be available to you competently and in a friendly manner

- Email: user support.software-recht@wolterskluwer.com
- Phone: 040/53 93 269-02, -03 and -04.

We wish you a lot of fun and joy with the new update!

Best regards
Your winra team

# 2   First-start-assistant after update installation

If you start winra for the first time after the update installation, the first start wizard will be opened. Please check the information and register in any case the MS Office AddIns. These are mandatory for the communication with MS Outlook and MS Office.
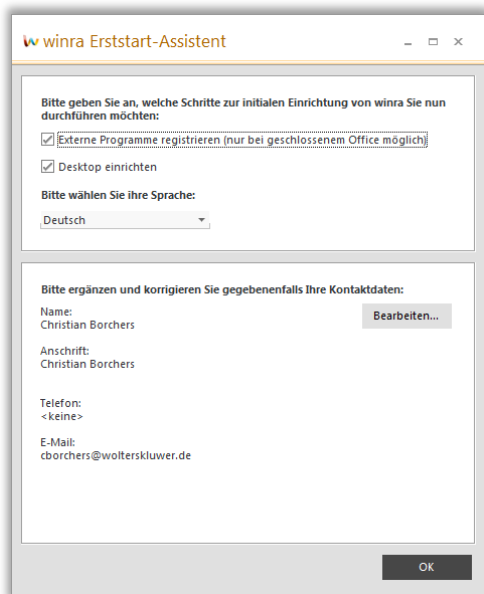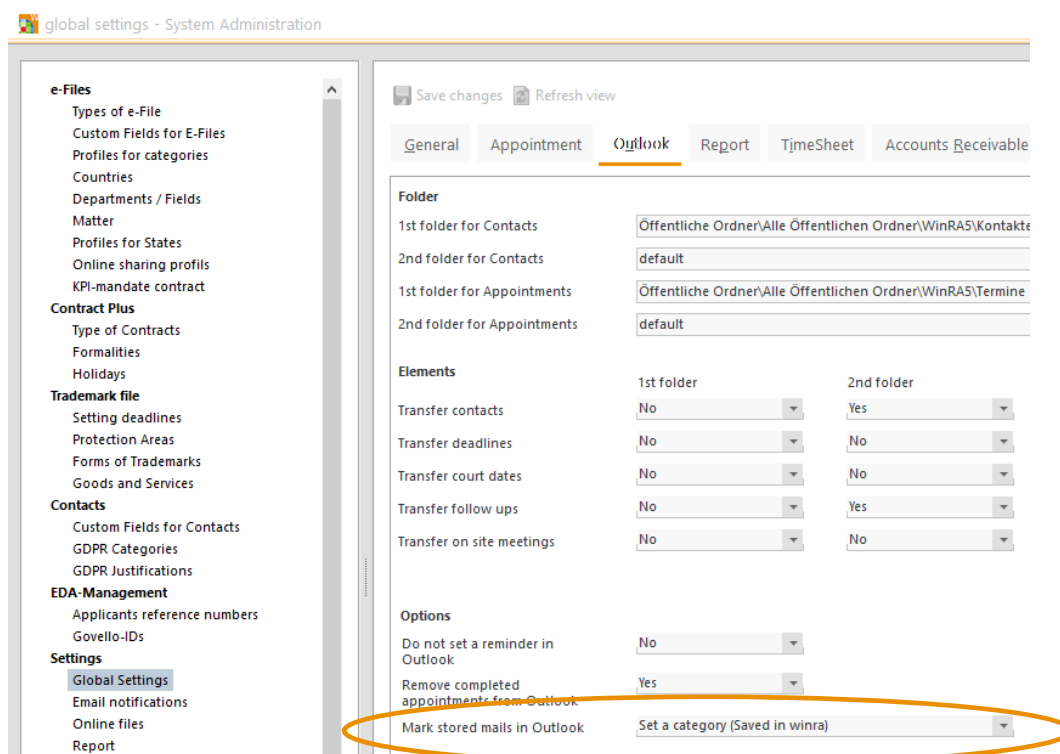
3   Saving e-mails

3.1   Saved e-mails can be marked as categories in Outlook

Since many users use the checkbox for other purposes, there is an additional option to mark saved e-mails in winra: Setting an Outlook category ‚Saved in winra':
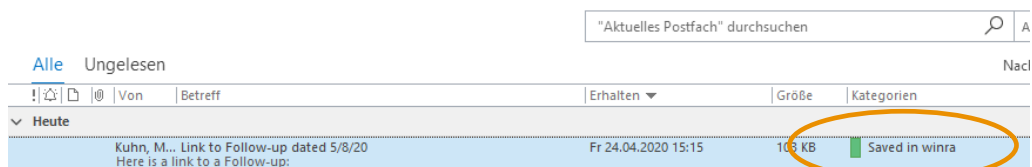
This functionality must be activated in the system administration under the global settings as follows:

Alternatively, this function can be set individually for each user in the user administration. You can store this function in the settings of the respective user.

This function is only supported by Outlook and not by Lotus Notes.

3.2   Encrypted E-Mails

If encrypted Outlook e-mails are to be stored in winra, there is now a warning in File2Hist, which should prevent that e-mails are unintentionally stored encrypted.

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However, it is still possible to store encrypted e-mails. In order to quickly recognize that an encrypted e-mail is involved, this information is displayed in an additional column in the file history, the history favorites and the history box with a lock symbol:

The function 'Set encryption flag for e-mails' is available in the system administration in the admin tools. This function examines all Outlook e-mails in the winra database and sets this flag for encrypted e-mails. This function requires Outlook for the analysis. Caution, depending on the number of existing e-mails, the analysis may take a long time and may overload the computer.
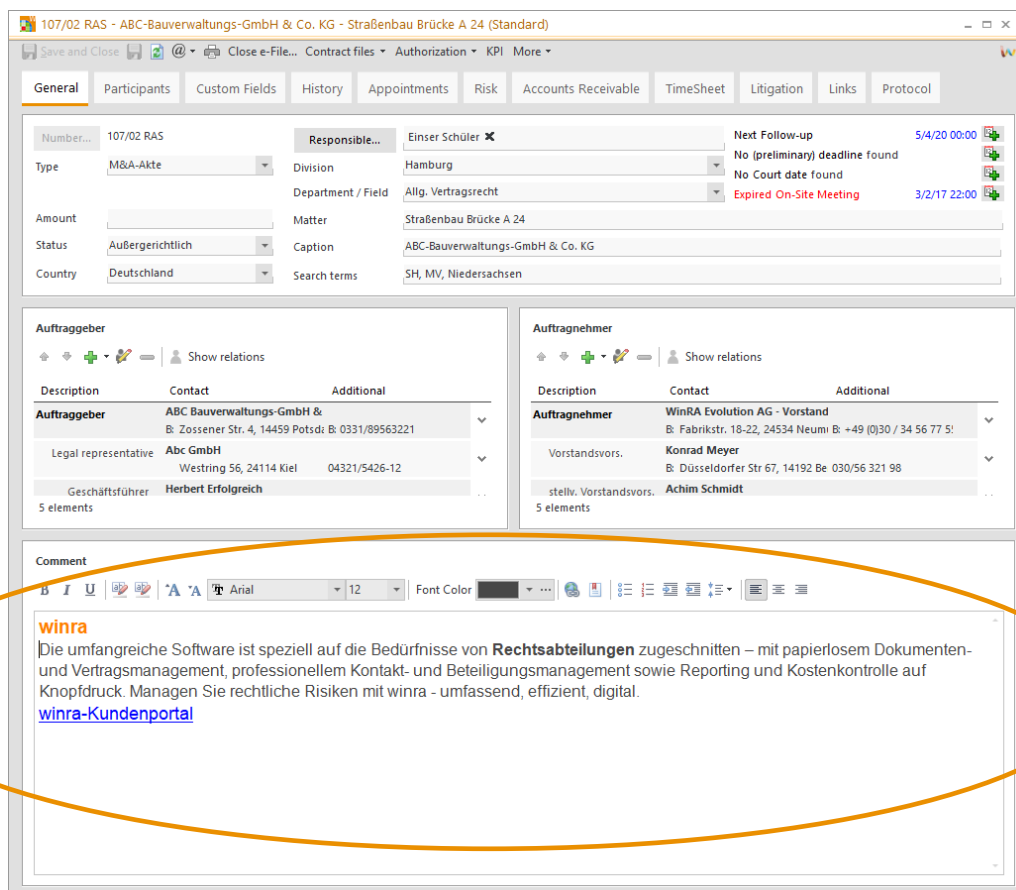
This function is only supported by Outlook and not by Lotus Notes.

# 4 File-extension

4.1 Comment fields

Comment fields can hold formatted text and also links. The operation is analogous to the input of formatted text for notes:


The comment fields in the Risk and Procedure tabs can also be formatted.

4.2 Customizing categories

If the wrong category profile was selected when the file was created, it can be subsequently adjusted. In a subdialog you can specify whether the categories already assigned are to be retained or removed:

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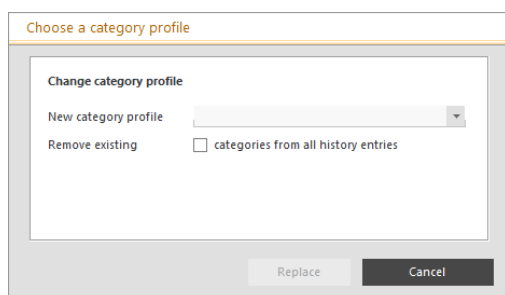
Another new feature is the possibility to sort the categories alphabetically. Both new functions can be found in the context menu of the category main node:
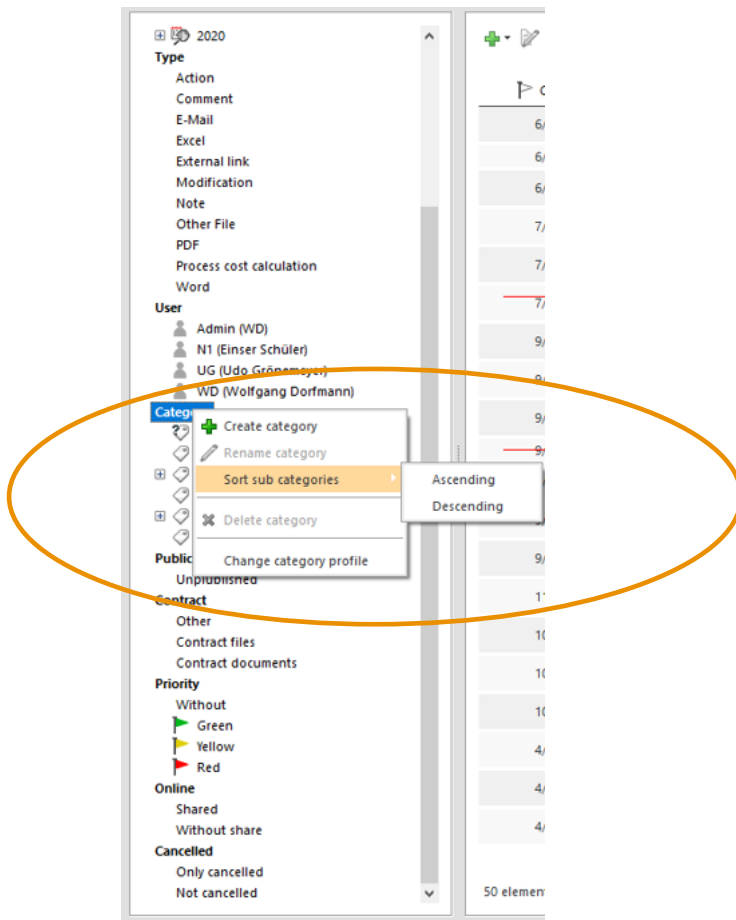
4.3   New history entry type for links

Links (e.g. addresses of websites) can now also be stored in the file history: Plus symbol of the file history-> external link / web link. The link and the description are defined in the input dialog:
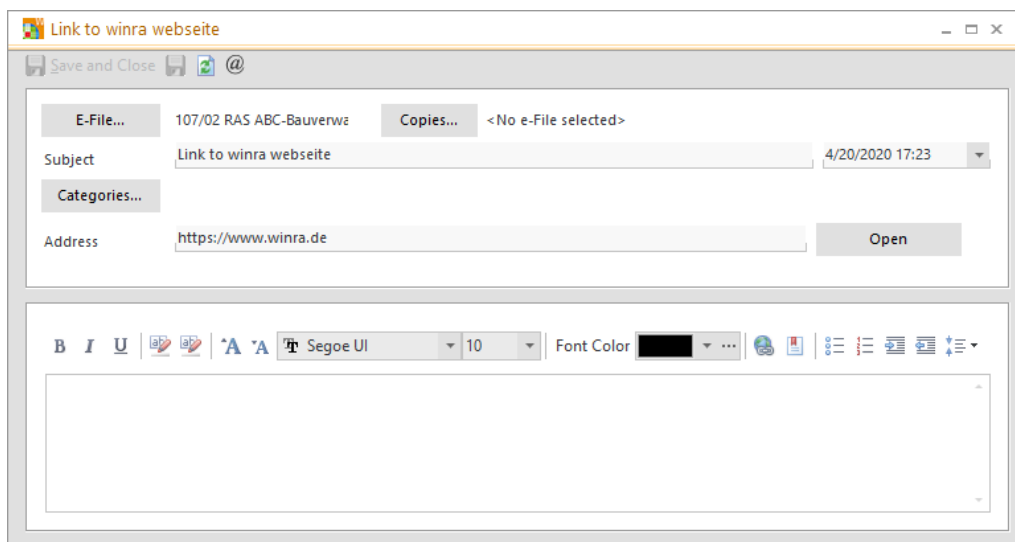
A click on the link in the file history opens the link in the default browser. The input dialog is called with 'File entry properties'. The behavior is therefore the same as for documents.

4.4   Additional improvements

Additional improvements in the file:

- There is a new column OCR. This indicates whether a document has passed through OCR recognition. (See Chapter 7)

- The file links show the territories of protection of the trade mark files.

- The deletion log for files has been improved and extended.

- There is a new right to restrict who can change free fields.

- Property list: Terms can be assigned with 'For All' to all (also future) types of files.

5   Add-ons for box-filling

No form fields are allowed in the headers and footers of Word. Therefore, it was not possible to use the functions of field fills there until now. Since many customers need this feature, we have created a possibility to enter data from the record there as well. For this purpose, text constants are entered in the header and footer, which are then replaced by fields of the fields, like the form fields, with the data from the record. In contrast to the form fields, the text constant is replaced by the filling. It is therefore not possible to fill or empty these text constants a second time.
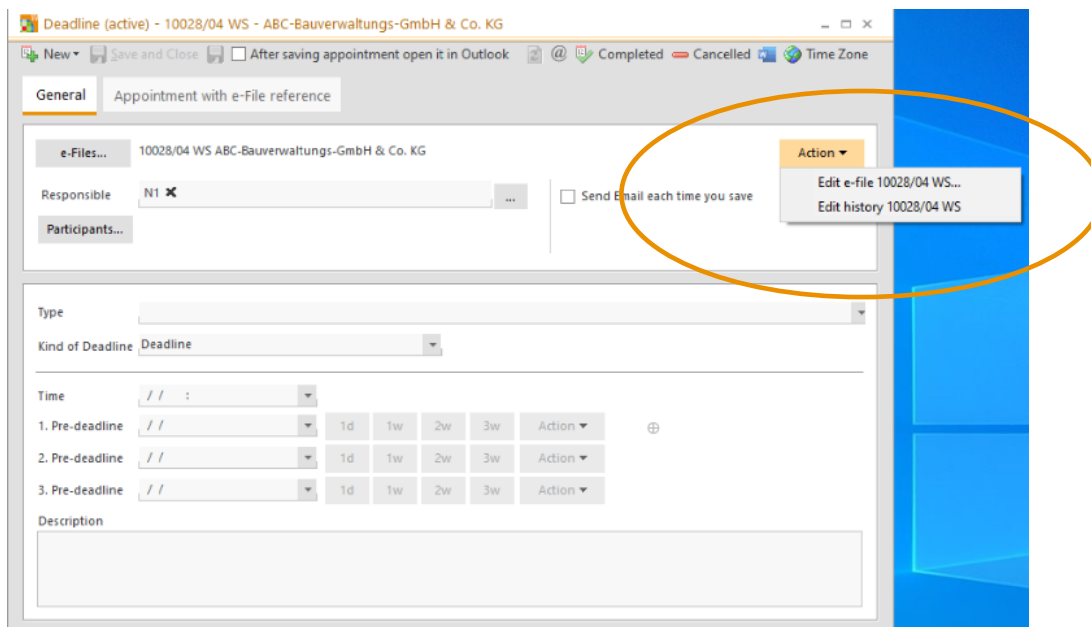
The text constants can be inserted into the header or footer of Word using the context menu:
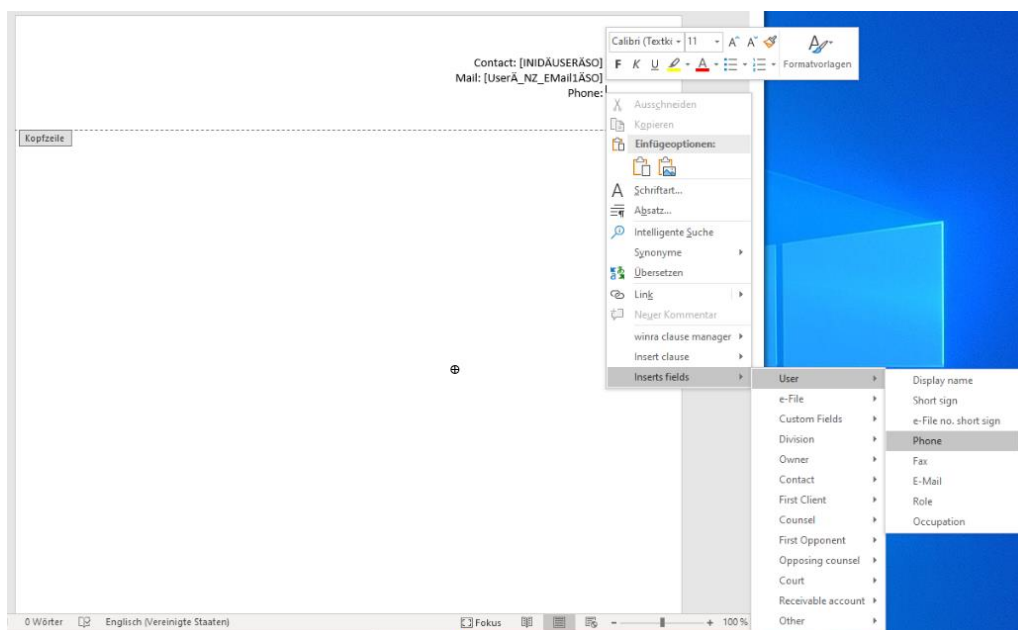
New is that the comment field of the file can also be transferred to Word. Currently, only the text can be transferred. Any existing formatting will be lost.

6   Appointments

There is now a possibility to jump from an appointment directly to one of the corresponding acts:

If a transfer of appointments to Outlook is active, appointments in Outlook are automatically created with a 15-minute reminder. This reminder can be deactivated in the system administration:

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Save changes   Refresh view

General   Appointment   Outlook   Report   TimeSheet   Accounts Receivable

Folder

1st folder for Contacts	Persönliche Ordner\Kontakte
2nd folder for Contacts	
1st folder for Appointments	Persönliche Ordner\Kalender
2nd folder for Appointments	

Elements

	1st folder	2nd folder
Transfer contacts	Yes	No
Transfer deadlines	No	No
Transfer court dates	No	No
Transfer follow ups	Yes	No
Transfer on site meetings	No	No

Options

Do not set a reminder in Outlook	Yes
Remove completed appointments from Outlook	Yes
Mark stored mails in Outlook	Set a category (Saved in winra)

7   OCR

This update also includes an update of the ABBYY OCR component. This component has a significantly improved recognition rate, for example for distorted scanned documents and multi-column text.

The component is included in the winra-client and is automatically updated with the updater. At the same time, the ABBYY license server must be updated and a new license entered. The licenses were automatically sent to you when you booked the OCR package.

For installation details, please refer to the 'winra-Update-6.4-IT' manual, which can also be downloaded from the Customer Portal.

There is a new column in File History, History Favourites and in the History Box that allows you to see if the document has passed through OCR recognition:

History Favorites

Creatio...				File...	Subject	user	Modifie...	Modifi...	e-File...	Caption	Matter		OCR	
8/14/18				✉	From Borc...	N1	8/14/18 1...	N1	34/08 ...	Assmann / Wettb...	Aufforderung zu...	★	☐	
4/20/20					Link zur w...	N1	4/20/20 5...	N1	107/02 ...	ABC-Bauverwaltu...	Straßenbau Brück...		☐	

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8 beA-Add ons

8.1 Health check

There are two new functions in the inbox that become visible as soon as you are logged in to beA. The first function is the "health check": It checks whether all authorizations and settings for smooth operation are available.

This check is performed automatically after logging in to beA. The second function lists all authorizations for all beA mailboxes that are accessible in the current beA session.
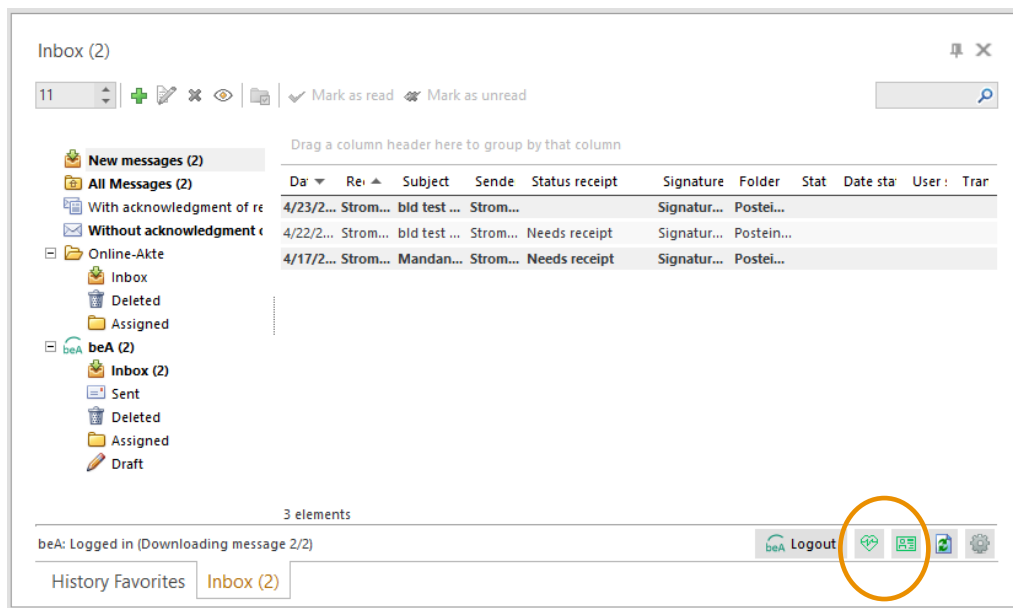
8.2 Grouping

The view in the inbox can be grouped by any column, for example by recipient:

8.3   Maintenance of the personal address book

In the search dialog it is possible to maintain the personal address book. Entries can be added and removed again. The corresponding functions are in the context menu:

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8.4   Safe-ID to a contact

A beA Safe ID can be entered for a winra contact on the "Details" tab. This allows beA messages to be entered more quickly. A new message with the participant as recipient can be created in the file participations via the context menu.

In the contact box the Safe IDs can be displayed in an optional column. It is possible to search for the safe ID.

8.5   File-related message creation

If a beA message is created from a record, the record number is preset as the record number. A tab has been added to the dialog for searching for recipients. All contacts in the file are displayed for which a beA Safe ID has been entered:
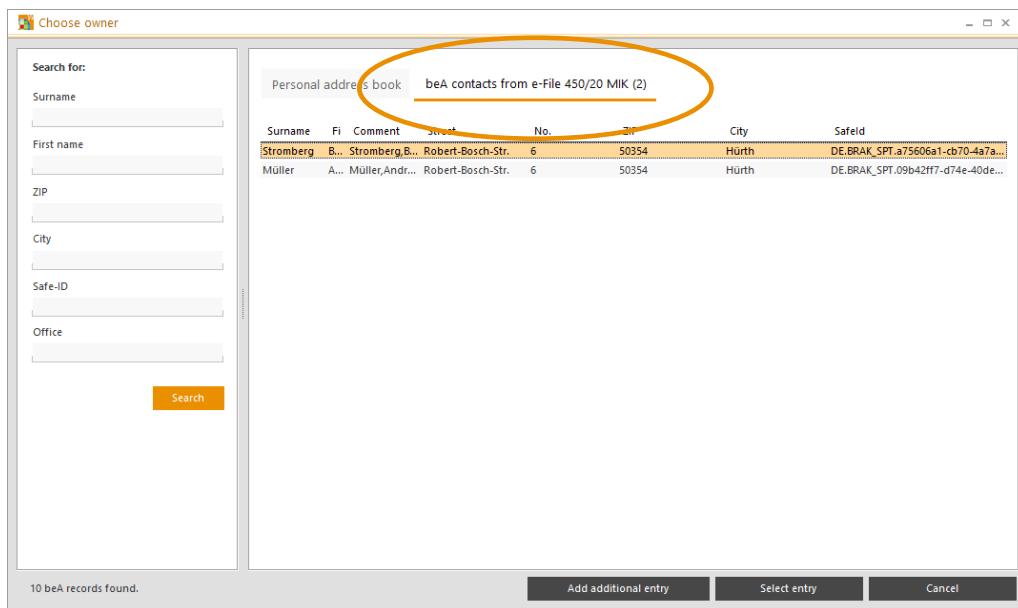
8.6   Checking file names

The file names of attachments are checked for conformity when new messages are captured, and a message is displayed if necessary.

By means of 'Revise file names' the file names can be adapted comfortably and quickly:
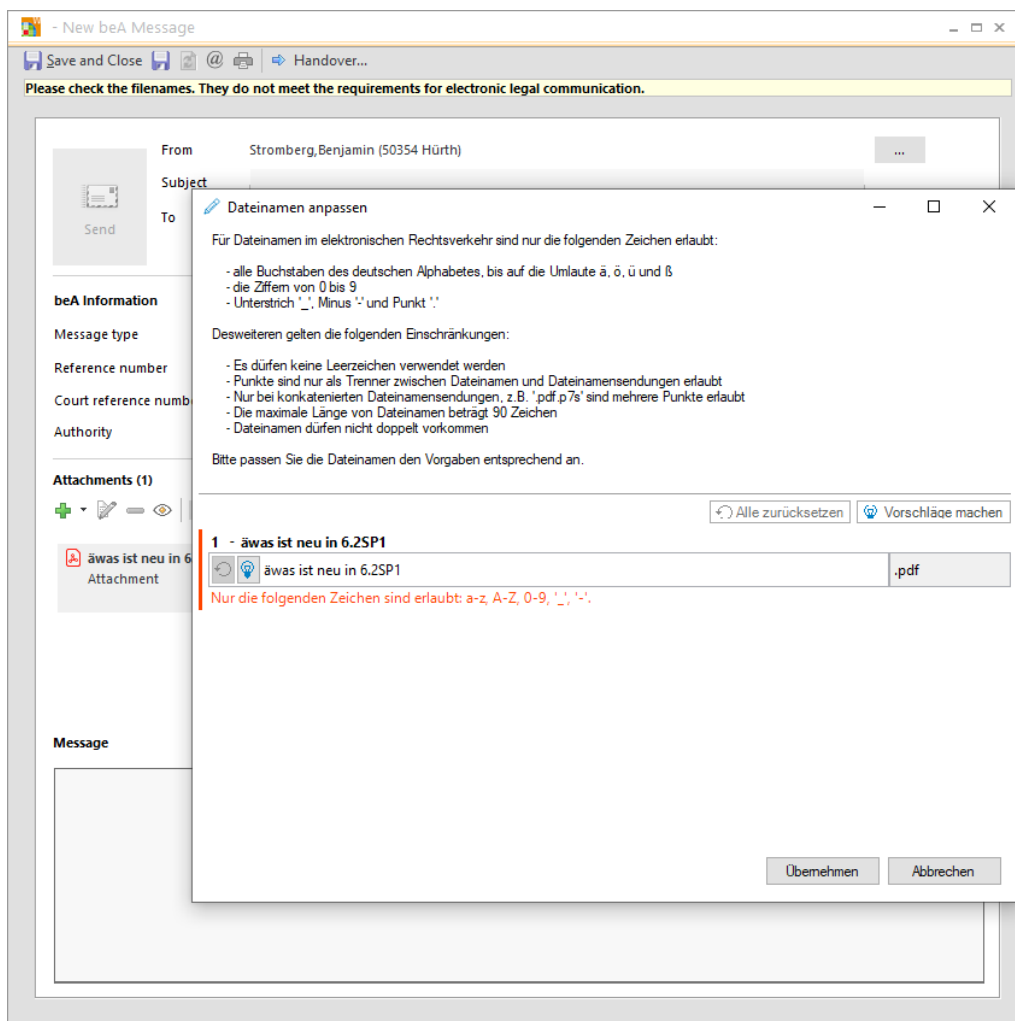
8.7   Assigning to the file

If a message is assigned to a record, it is moved to the assigned folder of the winra mailbox. If the same message is also present in a mailbox of another user, it will be moved to the assigned folder of the other user. This avoids double assignments to the file from the beginning. As an additional security the attempt of a duplicate assignment is detected in File2Hist and displayed as a warning message.

Additionally, it is also possible to move the assigned mail to a subfolder in the beA-mailbox (beA-Webinterface). This can be configured in the beA settings:

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8.8 View of the structural data record

There is now an HTML view for the structural data record. This allows you to see the data contained in it at a glance. Double-clicking on a structure data record opens the corresponding HTML view in the default browser.

This view is also available when creating confirmations or rejections:

Empfangsbestätigung   _ □ ×

Bitte nehmen Sie Ihre Eingaben vor:

Absender- und Empfängerdaten:

| Von | Stromberg, Dr. Benjamin (50354 Hürth) | ... |
| An | Stromberg, Dr. Benjamin (50354 Hürth) | ... |

Datum der Empfangsbestätigung:

Empfangsbestätigung eingegangen am: 22.04.2020   ▾

Antwortdatei: ⬆

Html   Xml

Empfangsbekenntnis

Geschäftszeichen

00001/20

DE.BRAK_SPT.a75606a1-cb70-4a7a-

In Sachen

bin ich zur Entgegennahme legitimiert und habe heute als elektronische(s) Dokument(e) erhalten:

Typ	Dokumentendatum	Anzeigename
Andere / Sonstige		Schriftsatz_1_-_Kuendigungsschutzklage.pdf
Andere / Sonstige		Schriftsatz_1_-_Kuendigungsschutzklage.pdf.p7s
Andere / Sonstige		Anlage_3_-_Kuendigungsschutzklage.pdf

Datum

22.04.2020

Bestätigung signieren und senden   Abbrechen

9 Online file

9.1 Password-Policies

For the passwords of the online file, the rules of the password policies can be freely defined. The following settings dialog can be found in the system administration under Settings->Online file:

You can set the following conditions:

- Minimum password length

- Complexity - select how many of the following groups must be used in the password: uppercase, lowercase, numbers and special characters.

- History - how many passwords in the past are checked and must not match the current one.

- Time expiration - The password is only valid for a certain period of time and must be changed then. With the expiration reminder the user will receive an email in time before the expiration.

9.2 Displaying notes in the documents

In addition to documents from e.g. Word and PDF files, notes and comments from the files can now also be displayed in the online file. These are transferred as PDF files and are displayed in the list of documents.

9.3 "Read" marking for documents

The online file now contains a marker indicating whether a document has already been read or opened. This makes it easy to identify documents that have not yet been read.

The view for the news list can be switched by the user between New (documents that have been added since the last login) and Unread (documents that have never been opened).

The new list has a size limit, so that it will be truncated if there are many entries.