
What's new in DocuWare Version 6.11

Copyright © 2017 DocuWare GmbH

All rights reserved

The software contains proprietary DocuWare information. It is provided under a license agreement containing restrictions on use and disclosure and is also protected by copyright law. Reverse engineering of the software is prohibited.

Due to continued product development this information may change without notice. The information and intellectual property contained herein is confidential between DocuWare GmbH and the client and remains the exclusive property of DocuWare. If you find any problems in the documentation, please report them to us in writing. DocuWare does not warranty that this document is error-free.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior written permission of DocuWare.

This document was created using AuthorIT™, Total Document Creation (<http://www.author-it.com>).

Disclaimer

The content of this guide is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by DocuWare GmbH. DocuWare GmbH assumes no responsibility or liability for any errors or inaccuracies that may appear in the informational content contained in this guide.

DocuWare GmbH
Therese-Giehse-Platz 2
D-82110 Germering
www.docuware.com (<http://www.docuware.com>)

Contents

1	Email Management	5
1.1	Connect to Outlook Redesigned	5
1.2	Watching Folders and Subfolders in Outlook	6
1.3	Saving Email Attachments in Outlook with a Right-Click	7
1.4	Updating Configurations in Outlook	7
1.5	Starting New Storage and Search Configurations from Outlook	8
1.6	Setting Up Mail Servers for All Users	9
1.7	Configuring Autodiscover Settings from Mail Server	9
2	Workflow: Controlling Business Processes Professionally	11
2.1	Starting Workflows According to a Schedule	11
2.2	Show Out of Office for Inquiries	12
2.3	Adding Descriptions and Links to Task Forms	13
2.4	Variables for Error Tracking	16
3	Teamwork	17
3.1	Exchanging Web Forms	17
3.2	Assigning Attachments to Individual Merge Forms	18
3.3	Sorting Selection Options in Web Forms	19
4	Additional New Features and Improvements	20
4.1	Managing DocuWare	20
4.1.1	Migration from Silverlight to HTML5	20
4.1.2	Setting Up Document Trays	20
4.1.3	Creating Notifications	21
4.1.4	Configuring Intelligent Indexing in the Store Dialog	22
4.1.5	Workflow Permissions for Roles	22
4.1.6	Conveniently Backing Up and Loading of Organization Settings	23
4.1.7	Removing User Dependencies with a Click	23
4.1.8	Changed System Requirements	24

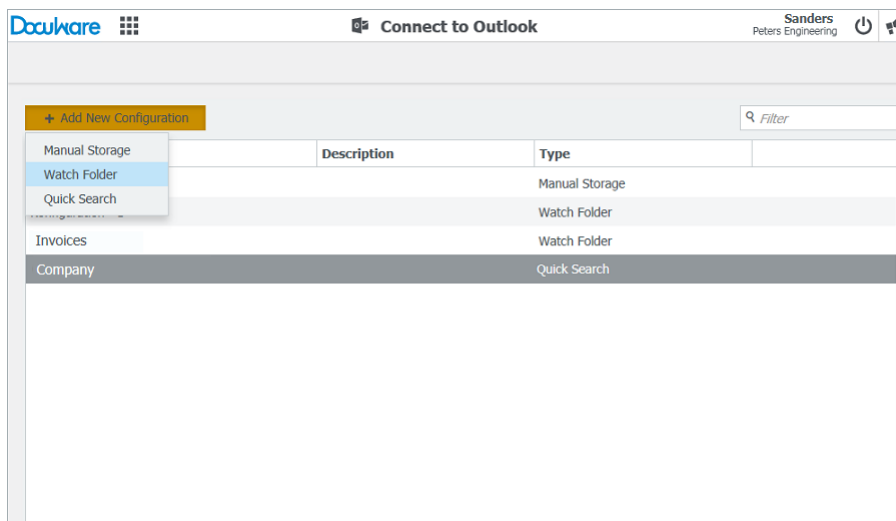
4.2 Usability Improvements	24
4.2.1 Personal Menu.....	24
4.2.2 Index Card View now Default for Document Trays	25
4.2.3 Opening Document Links with DocuWare Mobile	25
4.2.4 Color Picker for Form Design	26
4.2.5 Showing Tasks from Different Workflow Versions Together	26
4.2.6 Searching for Names When Reassigning Tasks	27
4.2.7 Showing and Hiding Automatic Activities	27
4.2.8 Automatic Workflow Stop.....	28
4.2.9 "No Reassignment" as Default for Tasks	28
4.2.10 Clearing Fields	29
4.2.11 Choosing the Trash Can for Deleted Emails	29

1 Email Management

1.1 Connect to Outlook Redesigned

Components: [Connect to Outlook](#), [DocuWare Configuration](#)

The Outlook integration module has been completely redesigned. Performance (on page 20) has been significantly improved, and the *Watched Folder* function has been optimized and extended. The configuration is now more closely integrated with Outlook making it even easier for users to create new configurations and select storage options directly from the email program.



The Connect to Outlook home page: Choose whether you wish to create a new configuration for manual storage, a watched folder, or a quick search.

Benefits

- Watch Outlook folders and their subfolders (on page 6)
- Only archive selected emails from watched folders
- Select a folder in Outlook to watch with DocuWare (on page 8)
- Easily create a watched folder as your own configuration
- Index emails with folder names (on page 6)
- Select a storage configuration in Outlook by right-clicking on the email attachment (on page 7)
- Update configurations in Outlook (on page 7)
- Start new storage or search configurations from Outlook (on page 8)

1.2 Watching Folders and Subfolders in Outlook

Components: [Connect to Outlook](#), [DocuWare Configuration](#)

DocuWare can automatically import emails that are moved into a watched folder. Now subfolders can also be watched. Indexing is defined in the storage configuration used.

The option to fill an index field with the folder name is also new. The name of the (sub)folder in which the document is currently located will always be used.



Application

- A team leader regularly receives invoices from various service providers, which are moved to the "Service Provider xy" subfolder in the "Invoices" folder in Outlook via a forwarding rule. The watch setting on the "Invoices" folder will now also archive invoices from all subfolders.




Benefit

- Only one configuration is needed to watch several folders




How to use the function

Open the *Connect to Outlook* module in DocuWare Configuration under *Integration*. Specify a folder under *Watch Folder* and enable the *With Subfolders* option:

DocuWare  **Connect to Outlook**

< Back

Configuration - 1 

Watch Folder Import Options Store Target Indexing Permissions

Options for automatically storing emails

Watch folder

☒ Include Sub Folders

1.3 Saving Email Attachments in Outlook with a Right-Click

Component: [Connect to Outlook](#)

Attachments can be stored as your own documents in DocuWare directly from Outlook with a right-click. All you need to do is select the desired configuration in the context menu. It is also possible to store several attachments with the same configuration at once.

Application

- You receive an offer by email. The cover letter only contains a standard text, which you do not require for processing. The new function ensures that only the attachment is sent to the file cabinet.

Benefit

- Straightforward archiving of attachments
- Only relevant documents are sent to the file cabinet

How to use the function

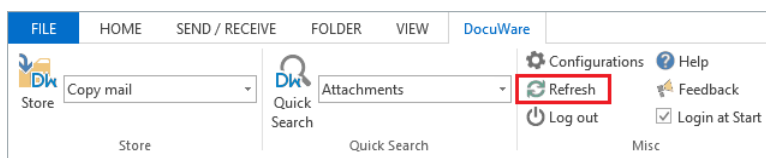
Right-click on the attachment and select *Save to DocuWare* along with the desired configuration. The attachment will be saved to the file cabinet with the relevant options and indexing.

1.4 Updating Configurations in Outlook

Component: [Connect to Outlook](#)

Saving and search configurations in Connect to Outlook sometimes need to be adjusted or supplemented on the fly – for example if you want to automatically import emails from a new Outlook folder.

All you need to do to apply the changes is click on the new *Refresh* button on the DocuWare ribbon in Outlook. You no longer need to log out and in again.



1.5 Starting New Storage and Search Configurations from Outlook

Components: [Connect to Outlook](#), [DocuWare Configuration](#)

Open the wizard for a new configuration directly from Outlook. This is possible for all three configuration types: *Manual Storage*, *Watched Folder*, and *Quick Search*.

Application

- You want to store emails in a new file cabinet in Microsoft Outlook. As no configuration is available, you can create a new one and save the emails to the new file cabinet.

Benefits

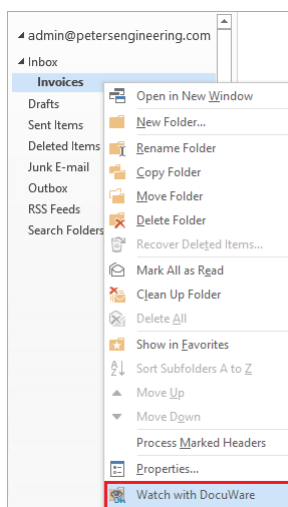
- Quick to set up
- You don't need to exit Outlook to start a new configuration.
- Path no longer needs to be entered for a watched folder

How to use the function

You can find the options *Quick Search* and *Save* for starting a new configuration under *New Configuration* on the DocuWare ribbon in Outlook.

The first page of the Connect to Outlook configuration wizard will open automatically. When the configuration is finished, click *Refresh* (on page 7) on the DocuWare ribbon in Outlook. The new configuration can be used immediately.

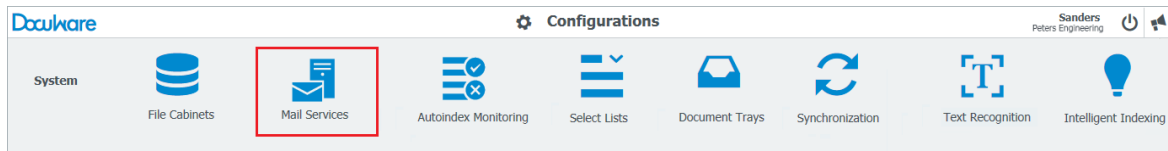
To start the setup of a new watched folder, right-click on the desired folder and select *Watch with DocuWare*. The path to the folder is then entered in the configuration automatically.



1.6 Setting Up Mail Servers for All Users

Components: Mail Services, DocuWare Configuration

Connections to IMAP or Exchange servers are now set up in DocuWare Configuration under the new *Mail Services* module. All users of an organization can access these connections to archive emails from their mailboxes in DocuWare.



You can set up connections to the mail services in DocuWare Configuration under System.

+ Benefits

- Set up organization-wide connections to email servers
- Users no longer need to connect to the mail server

⚙ How to use the function

Add a connection to a new mail server in the system section of DocuWare Configuration under *Mail Services*.

The user configures storage under *Connect to Mail* and then links the desired mailbox with the storage configuration and the server connection under *Email Accounts*.

Existing connections to mail servers will be transferred to *Mail Services* automatically.

1.7 Configuring Autodiscover Settings from Mail Server

Components: Mail Services, DocuWare Configuration

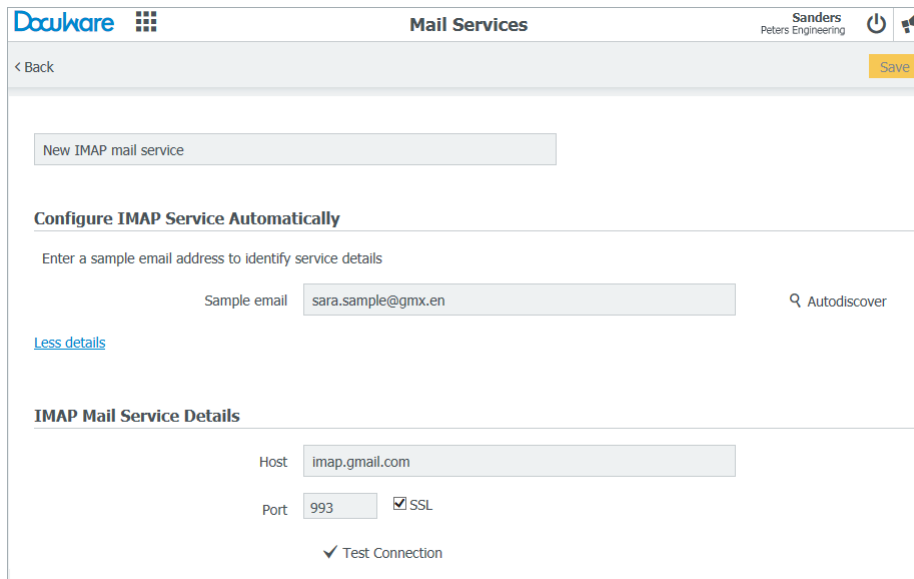
The new *Mail Services* (on page 9) component includes an *Autodiscover* function which makes it easier to set up mail server connections. If you enter an example email address for IMAP servers, the provider's host address and port will be entered automatically. Likewise, enter an example email for Exchange Servers and the Exchange Web Services URL will be displayed automatically.

+ Benefits

- Fast setup
- No lengthy searching for Exchange or IMAP Server data

How to use the function

Click *Register Mail Service* in DocuWare Configuration under System, and select *IMAP* or *Exchange*. Enter an example address for IMAP and click *Autodiscover*.



The screenshot shows the 'Mail Services' configuration page in DocuWare. The page has a header with the DocuWare logo, a user profile for 'Sanders Peters Engineering', and a 'Save' button. Below the header, there is a 'Back' link and a 'New IMAP mail service' button. The main section is titled 'Configure IMAP Service Automatically' and contains a text input field for a sample email address, which is currently set to 'sara.sample@gmx.en'. To the right of this field is an 'Autodiscover' button. Below this section is a 'Less details' link. The next section is 'IMAP Mail Service Details', which includes a 'Host' field set to 'imap.gmail.com', a 'Port' field set to '993', and a checked 'SSL' checkbox. At the bottom of this section is a 'Test Connection' button with a checkmark icon.

DocuWare Mail Services Sanders Peters Engineering

< Back Save

New IMAP mail service

Configure IMAP Service Automatically

Enter a sample email address to identify service details

Sample email sara.sample@gmx.en Autodiscover

[Less details](#)

IMAP Mail Service Details

Host imap.gmail.com

Port 993 ☒ SSL

✓ Test Connection

2 Workflow: Controlling Business Processes Professionally

2.1 Starting Workflows According to a Schedule

Component: [Workflow Manager](#)

Start workflows according to a schedule defined in the Workflow Designer, which can be carried out:

- daily or on specific days
- weekly or during specific weeks
- monthly or during specific months



Application

- Your company employs temporary workers on a part-time basis and that are paid hourly. Time cards for these employees need to be provided to Human Resources by the 20th of each month for processing payroll. You can start the workflow on the 21st of each month for all time cards yet to be processed. This means that you have a list of all necessary payroll accounts when you start work in the morning.
- Employees' travel expense claims are settled with their payroll once a month. A workflow is therefore started at the end of the month for every travel expense claim, in order to incorporate these payments into the payroll.



Benefits

- Time flexibility
- Simple pending box



How to use the function

Different additional settings for each of the three scheduling options mentioned above can be found on the "Start" page of the Workflow Designer:

The screenshot shows the 'Schedule' tab in the Workflow Designer. It includes a 'Trigger' tab and a 'Schedule' tab. The 'Schedule' tab is active, showing a summary: 'Start a new workflow based on this schedule'. The 'Repeat' dropdown is set to 'daily'. The 'Start at' field is set to '1/31/2017'. A dropdown menu is open, showing options: 'Every day', 'custom', 'every day' (selected), 'on weekdays (Mo-Fr)', and 'on weekends (Sa-Su)'.

Settings for daily execution

The screenshot shows the 'Schedule' tab of a workflow configuration. It includes a 'Trigger' tab and a 'Schedule' tab. The 'Schedule' tab is active. The text 'Start a new workflow based on this schedule' is at the top. Below it, a 'Summary' line reads: 'Repeats every week on Sunday starting at 1/31/2017 12:28'. There are three main fields: 'Repeat' with a dropdown set to 'weekly', 'On' with a dropdown set to 'Sunday', and 'Start at' with a date field set to '1/31/2017'. To the right of these fields is a list of options: 'every week' (selected), 'every 2 weeks', and 'every 3 weeks'.

Settings for weekly execution

The screenshot shows the 'Schedule' tab of a workflow configuration. It includes a 'Trigger' tab and a 'Schedule' tab. The 'Schedule' tab is active. The text 'Start a new workflow based on this schedule' is at the top. Below it, a 'Summary' line reads: 'Repeats every month on the first Sunday starting at 1/31/2017 12:28'. There are three main fields: 'Repeat' with a dropdown set to 'monthly', 'On the' with a dropdown set to 'first', and 'Start at' with a date field set to '1/31/2017'. To the right of these fields is a list of options: 'every month' (selected), 'every 2 months', 'every 3 months', 'every 4 months', 'every 6 months', and 'every 12 months'.

Settings for monthly execution

Workflow instances can only be started for up to 100 documents per scheduled start in order to ensure optimal performance of the DocuWare system.

2.2 Show Out of Office for Inquiries

Components: [Web Client](#), [Workflow Manager](#)

From DocuWare version 6.10 you can send short inquiries about a document directly from the DocuWare Client. Such inquiries are suited to one-off or rare processes for which setting up a standard workflow would be too onerous.

If you create such an inquiry and the employee you wish to contact is out of office, this will now be displayed immediately in the DocuWare Client.

Benefit

- Only send inquiries to available employees
- No inquiries will sit around unprocessed

⚙️ How to use the function

Send request [X]

To

Name	Type	Out of office
Petra Jenkins	User	
Thomas Rain	User	10.10.2016 11:35 - 14.10.2016 11:35

+ -

☐ Assign request to the list above in sequence
☒ Assign request to the list above all at the same time

Task is completed, if it has been confirmed by these users: All [v]

Details

Subject: New request from Sanders

Text: Please approve this document.

Decisions:
 ☒ Approve
☒ Reject

☐ Automatically stamp document with decision

Send request

If the user is not in the office, an Out of Office symbol will appear in the new column. The accompanying tooltip will show you the relevant person's specific Out of Office dates as they have been defined in the Web Client.

2.3 Adding Descriptions and Links to Task Forms

Components: [Web Client](#), [Workflow Manager](#)

You can now add descriptions in which you can explain the task or provide additional information. You can also add links, for example to other applications or files. A link can be within a description or stand alone.

You can also add individual links to external applications.

👤 Application

- Set up a direct link to the posting dialog in your ERP application so that you can edit accounts payable. This lets you enter your data, check it, and edit it directly from the ERP. You need to be using an ERP program that lets you call up posting dialogs via URL as a pre-requisite.
- A cost center needs to be assigned for each form in a task. The user will receive not only a description with details of the task, but also a link to the cost center list.

+ Benefits

- Faster task completion
- Direct access to other applications
- More transparency with forms

⚙️ How to use the function

Task

General Notification **Decisions** Escalations ?

Invoice +

Common **Form** Assign data Assign to

Form

i You have no field defined yet. To add a field, click on the plus icon.

Field name	Type
+ Field	
Link	
Description	

✕ Cancel > OK

Give the form field a name and select either "Link" or "Description" under "Type." If you select "Link," you will only be able to add a link.

Description

Enter a description. You can add variables, fields, and links to your text (e.g. a link to a program).

Links

Title: **Add**

Address:

Available variables

System variables | Global variables | Index fields

Workflow name	WF_WORKFLOW_NAME
Start date-time	WF_START_DATETIME
Activity	WF_ACTIVITY
Assigned to	WF_ASSIGNED_TO
Current user	WF_CURRENT_USER
Received on	WF_RECEIVED_ON
Reminder date	WF_NOTIFICATION_DATE
Due date	WF_EXPIRATION_DATE
Current date	WF_CURRENT_DATE
Task user	WF_TASK_USER

Cancel **OK**

If you choose "Description" at the top, you can add links (e.g. to your ERP as described above), variables, and fields to your explanatory text.

Docuware Sanders Peters Engineering

Document trays | Searches | Lists | **Tasks** | Folders

Accounts Payable

Reassign | History

Activity	Company	Gross Amount	OpenAmount	Received on	Rem
Assign Cost Center	US-Steel	1,059,238.09	1,059,238.09	12/12/2016 5:36 PM	
Pay invoice	Phone Wizard	857.09	0.00	12/12/2016 5:41 PM	

1-2 of 2

Cost Center

Please choose the cost center for this invoice. If the invoice needs to be approved by several cost centers, you can select multiple cost centers and departments.

Cost Center *

If you are unsure, which cost center to choose, click [here](#) to open a list of cost centers and departments.

[List of cost centers and departments](#)

Cancel **Confirm**

The link in the task will take you straight to the other application – to a list of cost centers here, for example. The text will explain what you have to do.

2.4 Variables for Error Tracking

Component: [Workflow Manager](#)

There are two new system variables for error tracking:

- *Last error activity*: In the event of an error, this variable allows you as a controller to see which activity caused the error in question. This variable will automatically be filled with the name of the failed activity.
- *Last error message*: This variable tells you about the nature of the error.

Benefits

- Faster and better error management
- More transparency

3 Teamwork

3.1 Exchanging Web Forms

Components: DocuWare Forms, DocuWare Configuration

Web Forms and Merge Forms can be exported and imported into another DocuWare system running version 6.11 or above. The import and export function includes form fields and form layout, as well as files for a Merge Form. After importing a form, you must choose a file cabinet for it and specify its indexing and permissions.

Applications

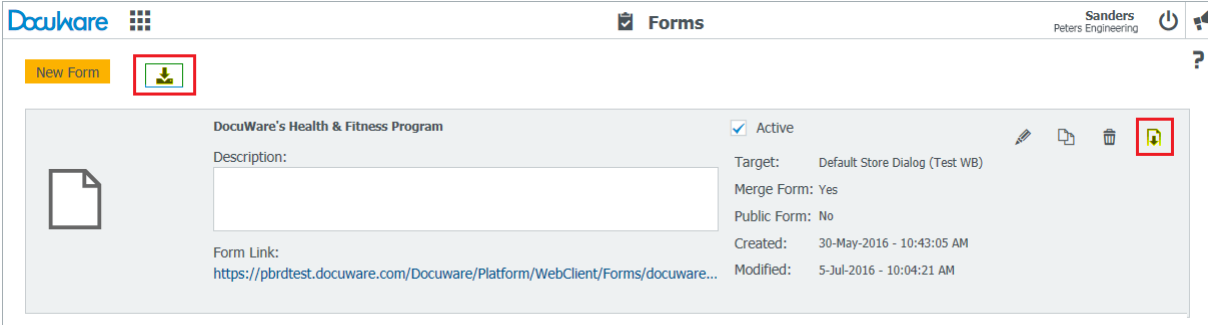
- A supplier of car accessories uses a DocuWare on-premise system for internal document management and the DocuWare Cloud for orders. The Cloud system contains an order form that should also be available to employees on the on-premise system. This is solved by importing the form from the Cloud system to the internal DocuWare system. There is no need to configure a new form.
- All of an international company's branches have to carry out data collection using specific forms which match the company's corporate design. The forms are designed at the company's headquarters and exported for the individual branches.
- A service provider digitizes form workflows for other companies. The provider creates the desired forms and Merge Forms with graphical elements. All the customers have to do is import the forms and adjust the store targets, indexing, and permissions.

Benefits

- Easily exchange forms
- Reusable form design

How to use the function

Use the two marked icons to import and export forms on the *DocuWare Forms* overview page:



Exported forms have the extension "DWF."

3.2 Assigning Attachments to Individual Merge Forms

Components: DocuWare Forms, DocuWare Configuration

Data entered into a Web Form can be distributed to various users using Merge Forms. However, files which are not relevant to all recipients are often attached to the Web Form. You can now define which attachments should reach the individual employees.



Application

- A new employee fills out a Web Form with personal information and other data. They attach a passport photo, a certificate of contributions to savings schemes, and a driver's license. The data is archived via Merge Forms and distributed to the relevant departments. The new function ensures that the driver's license for the company car is only sent to the HR department and not to the IT department, for example.



Benefit

- Only relevant attachments are saved with the Merge Form.



How to use the function

Open the desired configuration in *DocuWare Forms*. All of the Web Form's attachment fields are displayed in the *Merge Form Output* tab – including the fields that were added in earlier DocuWare versions. Only activate the fields containing attachments that you wish to save with the current Merge Form:

Docuware Forms

Designer > Submission > Merge Forms > Merge Form Designer > **Merge Form Output** > Merge Form Indexing

Store to

Select a store dialog that will be used for submitted web forms. The form-filler will not see a store dialog.

Store submitted Forms to: Default Store Dialog (Docupool)

Attachments

Submit this merge form with file attachments from the following Attach File Fields:

- ☒ Fitness Program 1
- ☒ Fitness Program 2

3.3 Sorting Selection Options in Web Forms

Components: DocuWare Forms, DocuWare Configuration

Users can select various options in the "Multiple Choice," "Dropdown," and "Checkbox" fields in a Web Form. These selection options can now be sorted during configuration, either ascending by numbers and then alphabetically, or descending alphabetically and then by numbers.

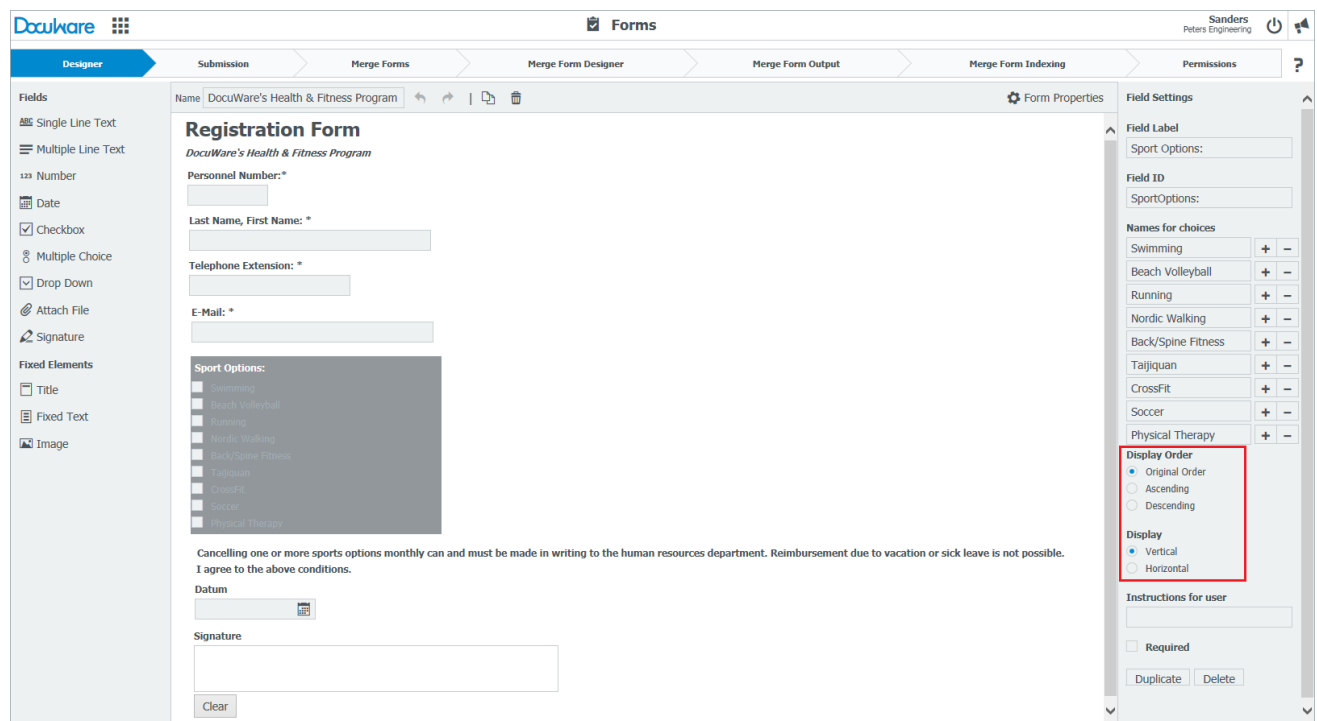
If a form field has multiple selection options, then you can arrange them horizontally. This lets the user see all options in the Web Form at a glance without having to scroll down to read them.

Benefits

- User can see all options immediately

How to use the function

Go to *DocuWare Forms* and open the *Designer* tab. The functions for sorting and ordering options can be found in the properties of the *Multiple Choice*, *Dropdown*, and *Checkbox* fields.



The screenshot shows the DocuWare Forms Designer interface. The main workspace displays a form titled "Registration Form" for "DocuWare's Health & Fitness Program". The form includes fields for "Personnel Number", "Last Name, First Name", "Telephone Extension", "E-Mail", and a "Sport Options" section. The "Sport Options" section is currently set to a vertical display of checkboxes with the following options: Swimming, Beach Volleyball, Running, Nordic Walking, Back/Spine Fitness, Taijiquan, CrossFit, Soccer, and Physical Therapy. Below the form, there is a text block about cancelling sports options and a signature field.

On the right side, the "Form Properties" panel is open, showing the "Field Settings" for the "Sport Options" field. The "Display Order" section is highlighted with a red box, showing three radio button options: "Original Order" (selected), "Ascending", and "Descending". Below this, the "Display" section has two radio button options: "Vertical" (selected) and "Horizontal".

4 Additional New Features and Improvements

4.1 Managing DocuWare

4.1.1 Migration from Silverlight to HTML5

DocuWare always relies on the latest technology to ensure that its product is as user-friendly and innovative as possible. That's why the continued migration from Silverlight to HTML5 (<http://blog.docuware.com/product-news/docuware-discontinues-silverlight>) is a key focus of DocuWare Version 6.11.

The following components within DocuWare Configuration are now based on HTML5:

- Document trays (on page 20)
- Notifications (on page 21)
- Connect to Outlook (on page 5)



Benefits

- Faster access to data with state-of-the-art technology
- Display and performance improvements for more browsers and mobile devices
- Improved user-friendliness

4.1.2 Setting Up Document Trays

Component: DocuWare Configuration

The document tray component in DocuWare Configuration has been reimplemented with modern HTML5 technology instead of Silverlight and with an improved user interface.

You can use this component for tasks such as creating document trays and assigning rights to them, just as before. From this version onwards, you assign fields for Intelligent Indexing in the store dialogs – see Configuring Intelligent Indexing in the Store Dialog (on page 22) – and then choose the desired store dialog in the document tray.

DocuWare Document Trays Sanders Peters Engineering

< Back Save

Thomas Rain - New Documents

Color for document tray ● ● ● ● ●

File cabinet for automatic storage Docupool

Use Intelligent Indexing with Choose store dialog

Choose users or roles that can use this document tray

Filter

Name	Type	Use	Administrate
admin	User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Thomas Rain	User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

+ -

^ Less options

☒ Limit the size of the document tray to 100 MB

Document tray location Location - Basket Edit tray locations

A clear overview of document tray configuration at a glance.

+ Benefits

- Everything at a glance instead of on multiple tabs
- Display and performance improvements for more browsers and mobile devices
- Improved usability

⚙️ How to use the function

The document tray component can be found under *System* in DocuWare Configuration.

4.1.3 Creating Notifications

Components: [Email Notifications \(Task Manager\)](#), [DocuWare Configuration](#)

The *Notifications* component in DocuWare Configuration has also been reimplemented: Silverlight was replaced by modern HTML5 technology and user guidance was optimized. Options to define and subscribe to notifications are now combined within one configuration, where previously they were split into two components. The notification options that users have access to are determined by their rights.

+ Benefits

- Simplified subscription to and configuration of email notifications within one component
- Display and performance improvements for more browsers and mobile devices
- Improved usability

How to use the function

The *Notifications* component can be found under *Collaboration* in DocuWare Configuration.

4.1.4 Configuring Intelligent Indexing in the Store Dialog

Components: [Intelligent Indexing](#), [DocuWare Configuration](#)

To use the Intelligent Indexing Service, first link the index fields of a store dialog with the Intelligent Indexing categories. You can now do this directly in the store dialog configuration instead of in the document trays as before. Nothing changes for users – they still choose the store dialog for Intelligent Indexing in the document tray.

Benefits

- Only define field assignment once and use it for any number of document trays
- It is now easier to ensure consistent field assignment within a company
- Improved recognition rate for Intelligent Indexing thanks to uniform configuration
- Simpler document tray configuration for DocuWare users

How to use the function

Bring up the desired store dialog under *System > File cabinets* and assign Intelligent Indexing categories to the dialog fields.

4.1.5 Workflow Permissions for Roles

Component: [Workflow Designer](#)

You can also assign designer rights to roles on the redesigned *Permissions* page. This excludes controller rights which can only be assigned directly to users. Users and roles are marked with their own icons.

Benefits

- Easier assignment of rights
- Better overview of permissions

4.1.6 Conveniently Backing Up and Loading of Organization Settings

Component: [DocuWare Administration](#)

The backup workflow saves the settings of a DocuWare organization so now besides the file cabinet settings, users, and permissions, this now also includes Workflow Manager configurations. The DocuWare system settings, however, are no longer included in the backup.

Applications

- After replacing the server hardware your file cabinet settings, users, and permissions can be loaded onto the new system from the backup. Reintegrate also your document database. After that DocuWare is available again.
- You set up DocuWare for customers as a service provider. You configure an example organization with file cabinets, users, permissions, and workflow configurations. This preparatory work can be loaded onto your customer's system via backup.
- In order to migrate conveniently from an on-premise system to the DocuWare Cloud, you can store the basic settings of a file cabinet via backup.

Benefits

- No need to set up organizations manually
- Flexibly migrate your DocuWare organization
- Workflow configurations included in backup

How to use the function

A backup workflow can be set up in DocuWare Administration under *DocuWare > System*, and a restore workflow in the *Tools* menu. You can select the organization in the backup wizard.

4.1.7 Removing User Dependencies with a Click

Component: [DocuWare Administration](#)

Assignments to a user's document trays, configurations, and other elements must first be removed before the user can be deleted from DocuWare. This can now be done automatically in DocuWare Administration.

Application

- A user leaves the company and needs to be removed from DocuWare.

Benefits

- No need to manually remove dependencies
- Saves on administration time in the system

How to use the function

Open the *Delete user* dialog as an administrator with *User Administration* rights in DocuWare Administration under *Organization > User Administration > Users*. If dependencies still exist, they will be shown in a list. Click on the new *Delete Dependencies* button here. In some cases, the dependencies cannot be removed automatically, for example when the user being deleted is the only owner of a file cabinet. In this case the administrator can take over the dependencies – including the file cabinet owner right – with the "Assign to Me" button. Then the user can be deleted.

4.1.8 Changed System Requirements

Supported operating systems now include Windows Server 2016.

Server computers with 32-bit operating systems and with Windows Server 2008, except Windows Server 2008R2, are no longer supported for DocuWare Server modules. This applies to both new installations and upgrades to Version 6.11.

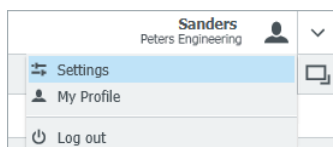
As always, the complete system requirements can be found in the Knowledge Center <http://help.docuware.com/en/#t55049>.

4.2 Usability Improvements

4.2.1 Personal Menu

Component: Web Client

Alongside the main menu, the Web Client now has a menu for user-specific options – the personal settings and the profile.



Under *Settings* you can edit the Web Client display, including language, displayed document trays, search dialogs, lists, menus in the Viewer, and much more.

In *Profile* you can change your password and configure your Out of Office settings. Please also enter your email address, so that you can be sent a new password in the event that you forget your current one. You can also subscribe to the User Info newsletter here in order to get monthly tips and advice for working day-to-day with DocuWare.

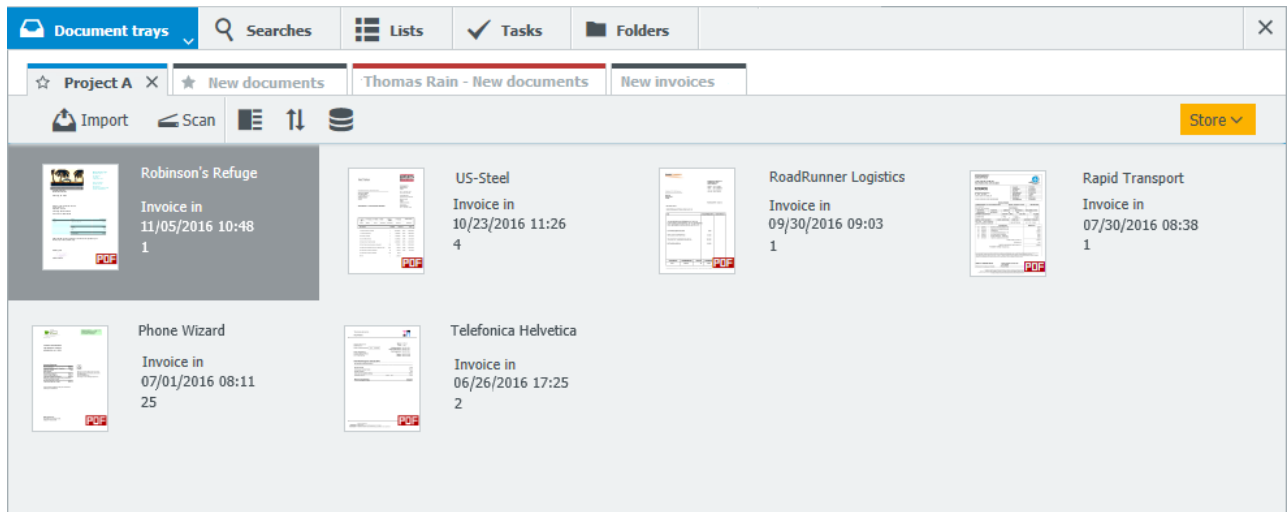
Benefits

- Easily complete your profile
- Improved overview lets you access different areas more easily

4.2.2 Index Card View now Default for Document Trays

Component: Document trays in Web Client

The index card view is now the default view for document trays. It offers a combination of thumbnails and index entries.



+ Benefits

- Clear overview of document and index data by default
- See Intelligent Indexing results immediately (<http://help.docuware.com/en/#t62841>)

⚙ How to use the function

The index card view will be used by default when you open the document tray. If you choose another view for the document tray, the system will remember this as long as the document tray is open, even if you log out in the meantime.

4.2.3 Opening Document Links with DocuWare Mobile

Components: Email Notifications, Workflow Manager, Mobile

When you open email notifications with links to DocuWare documents on your mobile device, the linked document will open in DocuWare Mobile if the app is installed.

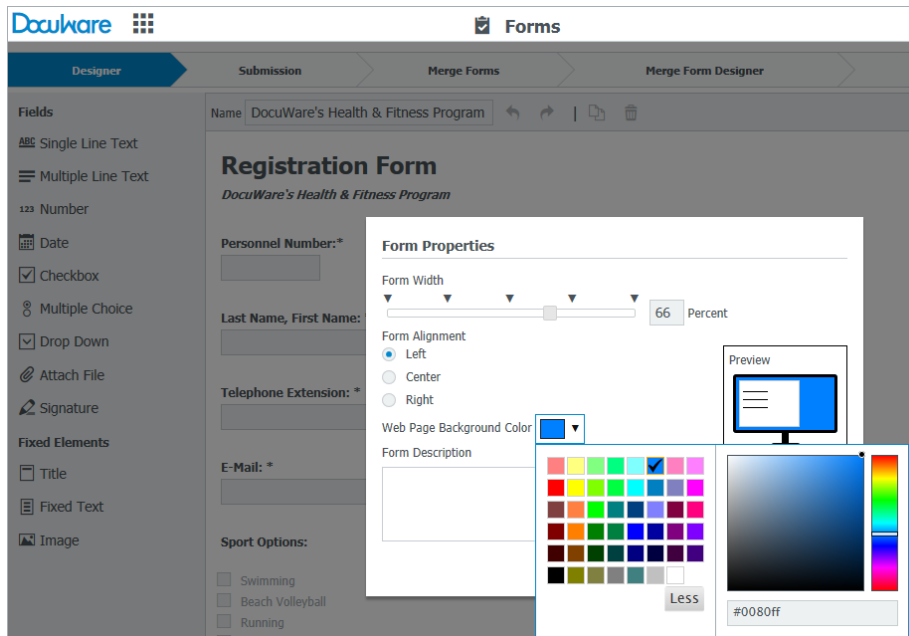
+ Benefits

- Optimum document display
- Improved usability on mobile devices

4.2.4 Color Picker for Form Design

Components: DocuWare Forms, DocuWare Configuration

The background color of a form web page can be defined via color picker, or by entering a hexadecimal value. The color picker is also available for fixed text fields.



The color picker expands design options for Web Forms.

+ Benefits

- Match your company's corporate design
- Define colors precisely

4.2.5 Tasks from Different Workflow Versions Shown Together

Components: Web Client, Workflow Manager

Tasks from a single workflow that were created with different workflow versions are now shown together in one list in the Web Client.

Docuware Sanders Peters Engineering				
Document trays	Searches	Lists	Tasks	Folders
Accounts Payable				
Reassign History				
Reminder date	Due date	Current user	Workflow instance ID	Workflow version
10.10.2016 14:06		Jenkins	fb53073f-6268-4734-aa09-...	2
10.10.2016 14:06		Jenkins	3f71daec-8d7c-4388-95e9-...	2

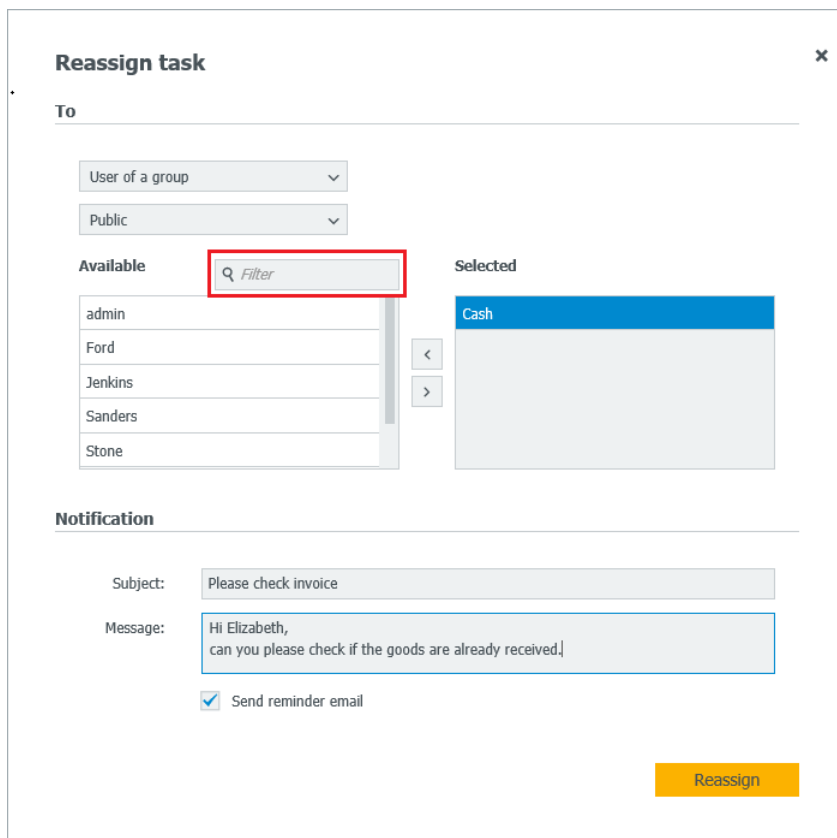
The controller can view the workflow version in a new column under "Watch Tasks."

4.2.6 Searching for Names When Reassigning Tasks

Components: [Web Client](#), [Workflow Manager](#)

If you wish to reassign a task in DocuWare Client, you now have access to a search field.

How to use the function



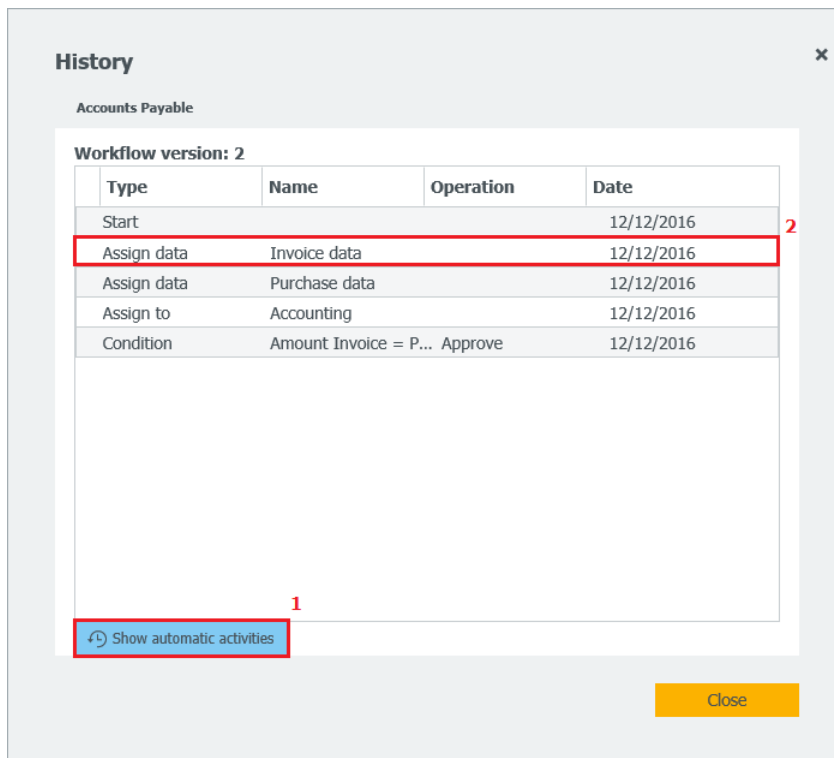
The reassignment search field

4.2.7 Showing and Hiding Automatic Activities

Components: [Web Client](#), [Workflow Manager](#)

The history is initially shown without automatic activities for a better overview of user decisions. However, these activities can be shown as and when required. This optimized display makes your work easier, especially when dealing with workflows that contain more automatic activities than user tasks.

⚙️ How to use the function



Click on the button (1) and the automatic activity (2) will appear. The button will change to "Hide Automatic Activities."

4.2.8 Automatic Workflow Stop

Component: [Workflow Manager](#)

In rare cases it may be necessary to automatically retract the publication of a workflow instance. If one of the following two scenarios occurs, the workflow instance will now be stopped automatically:

- An error causes a workflow instance to keep performing the same activity repeatedly (a loop) when it is run.
In order to ensure maximum transparency, the controller will automatically receive an email with information about which workflow and which activity within it are affected.
- A workflow creates new instances for the same document multiple times in succession.

4.2.9 "No Reassignment" as Default for Tasks

Component: [Workflow Manager](#)

The default option under *Decisions > Assign* when setting up workflows is now "No Reassignment" and the next task in the workflow will not be assigned to another person or location.

4.2.10 Clearing Fields

Component: [Workflow Manager](#)

You can delete field contents or variables in the Workflow Designer by leaving the fields empty. This excludes keyword fields.

4.2.11 Choosing the Trash Can for Deleted Emails

Components: [Mail Services](#), [DocuWare Configuration](#)

You can create a connection to an Exchange Server in the *Mail Services* (on page 9) component. You can also state whether deleted emails should be moved from the mailbox to the user's trash can, or directly to the Microsoft Exchange trash folder.