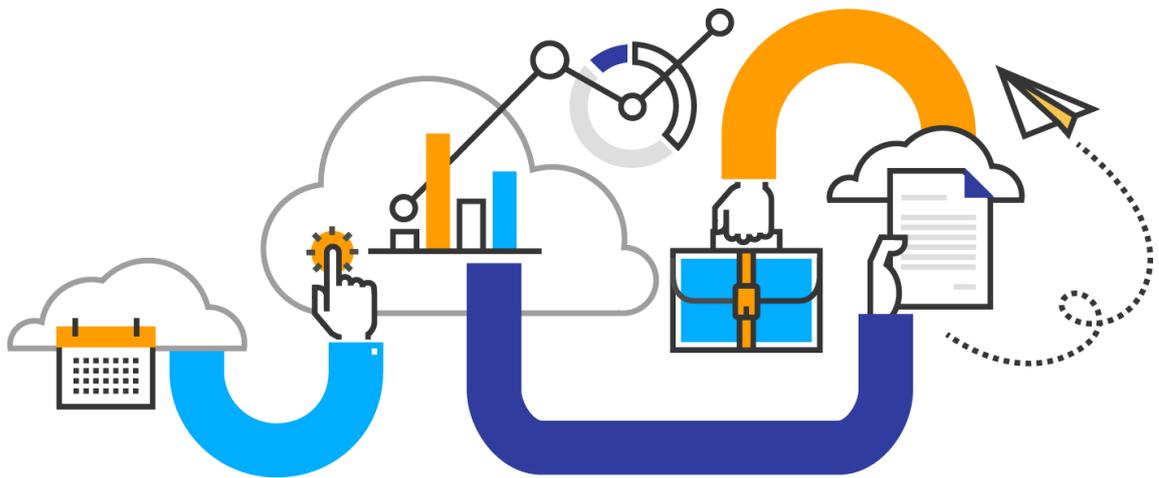




# What's New in DocuWare Version 7



Copyright © 2018 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 warrant 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

<b>1</b>	<b>New Technology Ready for All Size Organization</b>	<b>5</b>
1.1	Best usability in new User Management .....	6
1.2	User Synchronization for DocuWare Cloud.....	7
1.3	Simplified installation of on-premises systems .....	8
<b>2</b>	<b>Perfect Information Capture Made Easier</b>	<b>9</b>
2.1	Autoindex: new interface.....	9
2.2	Start Autoindex for a specific document.....	10
2.3	Monitor and automatically change index entries .....	11
2.4	Validation service checks form entries .....	12
2.5	Input masks for form fields.....	13
2.6	Show and hide form fields with logic .....	14
2.7	Links and formatted texts for forms .....	16
2.8	Write protection for forms with merge forms .....	17
2.9	Intelligent storing instead of email duplicates .....	17
2.10	Printer and Import configurations become "Document Processing".....	18
2.11	More amount fields for Intelligent Indexing.....	20
<b>3</b>	<b>Additional New Features and Usability Improvements in Version 7</b>	<b>22</b>
3.1	Using DocuWare .....	22
3.1.1	Easier DocuWare login with DocuWare Cloud .....	22
3.1.2	Close scan preview even faster .....	22
3.1.3	New names for workflow users .....	22
3.1.4	View document and history for completed workflow tasks .....	22
3.1.5	Error management during automatic workflow decisions .....	23

<b>3.2</b>	<b>Configure and manage DocuWare</b> .....	<b>23</b>
3.2.1	Clearer DocuWare Configuration .....	23
3.2.2	New module: Audit Reports .....	24
3.2.3	New module: Document Transfer .....	26
3.2.4	New function right "Document Processing" .....	27
3.2.5	Document tray for automatically imported users.....	28
3.2.6	Redundant backup of index data in DWX files .....	28
3.2.7	Change standard fields when creating a file cabinet.....	28
3.2.8	Registration for DocuWare Administration via Desktop Apps Authentication .....	29
3.2.9	Changed System Requirements .....	29

# 1 New Technology Ready for All Size Organization

DocuWare Version 7 - the basis for the next generation of our cloud architecture, provides future-proof document management and office automation technology. The new architecture optimizes performance, stability, and scalability making DocuWare Cloud perfect for even larger sized organizations. And since the cloud and on-premises software is always based on the same code having all the same features, all customers will benefit from this technology makeover.

## Technology highlights in the new version:

- File cabinets and document trays have been completely re-implemented. Instead of the Content Server, DocuWare Version 7 uses the latest technologies and works with optimized databases in a future-proof architecture. The noticeable advantage for all users: significantly better performance. Search approx. 50% faster, store documents approx. 35% faster, change index data approx 75% faster, to name just a few examples.
- A new workflow engine ensures that your workflow tasks are controlled even faster and more reliably. This engine also allows easier handling (on page 23) if a workflow has run into an error.
- All DocuWare Desktop jobs are now processed directly from the DocuWare Platform. This provides significantly better scalability than previous Desktop Server components.
- The User Management (on page 6) is now in the DocuWare Configuration. New technology and interface design make it much easier to create and grant rights to many users in the system.
- User synchronization (on page 7) between Active Directory and DocuWare Cloud is also new. Users and groups must only be maintained, for example created or deleted, in the leading system. Simpler, consistent user management is now also possible for DocuWare Cloud customers.
- Completely reworked is the latest version of the [DocuWare App](#). Future-oriented technologies offer the best performance and usability for mobile access to DocuWare as well .
- A new server setup (on page 8) guarantees an easier and faster installation for on-premises systems. Different roles replace the choice of components to install.

The combination of all these changes guarantee much better scalability of the system. This makes working with DocuWare easier, especially for DocuWare Cloud and larger on-premises installations.

## Additional technical information:

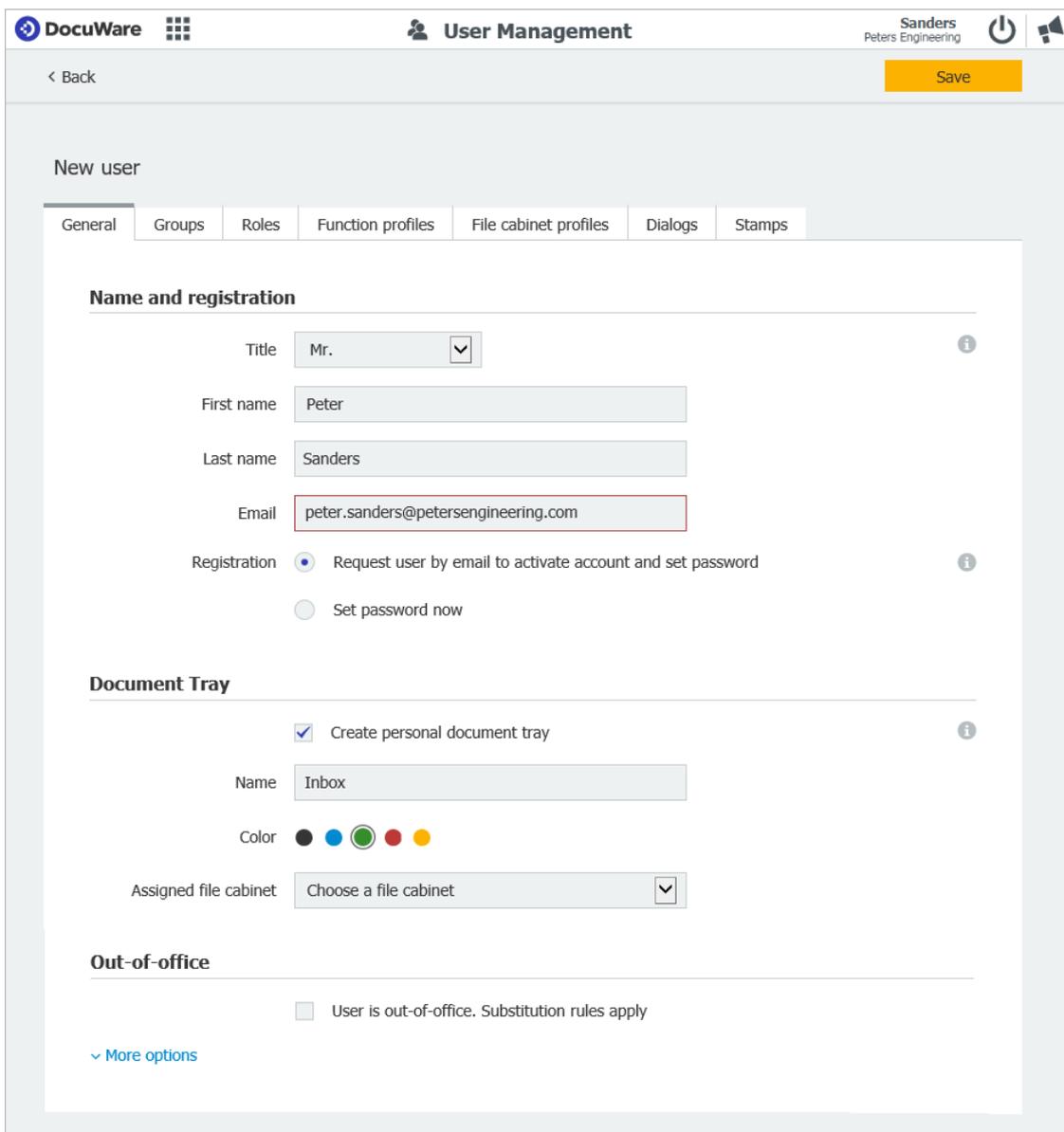
- [Changes with DocuWare Version 7](#) – for anyone planning to upgrade their On-premises system

## 1.1 Best usability in new User Management

### Component: DocuWare Configuration

From now on, users and their rights can be managed conveniently and clearly in the DocuWare configuration.

In just a few clicks, a new user is created with a personal document tray and all rights required for their tasks. The rights can be given to the user as usual through their membership of groups and roles and by the assignment of functions, function profiles, and file cabinet profiles. Here you can also specify the dialogs and stamps that the user may need. If the new colleague has registered via the automatically sent registration mail, they can start immediately.



The screenshot shows the 'User Management' configuration page in DocuWare. The page title is 'User Management' and the user is logged in as 'Sanders Peters Engineering'. The main heading is 'New user'. There are several tabs: 'General', 'Groups', 'Roles', 'Function profiles', 'File cabinet profiles', 'Dialogs', and 'Stamps'. The 'General' tab is active. The form is divided into three sections: 'Name and registration', 'Document Tray', and 'Out-of-office'. In the 'Name and registration' section, the 'Title' is set to 'Mr.', 'First name' is 'Peter', 'Last name' is 'Sanders', and 'Email' is 'peter.sanders@petersengineering.com'. The 'Registration' section has two radio buttons: 'Request user by email to activate account and set password' (selected) and 'Set password now'. In the 'Document Tray' section, the checkbox 'Create personal document tray' is checked, the 'Name' is 'Inbox', and the 'Color' is set to green. The 'Assigned file cabinet' is set to 'Choose a file cabinet'. In the 'Out-of-office' section, the checkbox 'User is out-of-office. Substitution rules apply' is unchecked. There is a 'Save' button in the top right corner and a '< Back' button in the top left corner. A 'More options' link is at the bottom left.

*The new intuitive interface makes it easy to create a new user*

 **Applications**

- Create users and equip them with rights, dialogs, and stamps
- Modify user rights
- Unlock users locked by failed login attempts
- Change password for users or send corresponding email to users
- Delete users

 **Benefits**

- Provide new users with necessary rights and an initial document tray immediately upon creation. This ensures a smooth start with DocuWare.
- Unlock a user or send a registration email with one click directly from the users' overview
- When deleting a user, also delete their document trays and other configurations or transfer them to the administrator. This ensures there is always order in the DocuWare system.
- Searching and filtering in the user overview simplifies user administration in systems with many users

 **How to**

The new user administration is located in the *General* section of the DocuWare Configuration.

## 1.2 User Synchronization for DocuWare Cloud

### Component: DocuWare Administrative Apps

With DocuWare Cloud systems, you can now conveniently synchronize users and groups from your domain with your DocuWare Cloud system via LDAP no longer needing to manually create the DocuWare users in DocuWare. This makes user management much easier, especially for larger cloud systems.

 **Benefits**

- Automatic and consistent users and groups in the domain and in DocuWare
- Creating users and groups only one time instead of two saves you time
- Create new DocuWare groups directly from the synchronization interface
- Individual scheduling for automatic synchronization

 **How to**

You install the User Synchronization app through Client Setup > Administrative Tools. The app is available for both DocuWare Cloud and on-premises systems. All users and groups from Active Directory that do not exist in DocuWare when the tool is first used are synchronized with DocuWare.

## 1.3 Simplified installation of on-premises systems

### Component: Server setup

The server setup has been completely redesigned: from its technology, to the user guidance and design. Installing a new DocuWare on-premises system is now more simple and stable than ever before. Instead of selectively activating individual DocuWare components for installation, simply select from among three roles that the server machiner in the DocuWare system should execute: provide services for clients, for background processing, or for fulltext processing. This also makes it easier to install large DocuWare systems on multiple server machines.

Additionally, the upgrade of an existing system is simple and reliable, since a simulation is performed first. If it runs without errors, you can update your system with complete peace of mind. Otherwise, a detailed report will tell you what to do before the upgrade.



### Applications

- Installation of a new DocuWare on-premises system
- Upgrade an existing on-premises system to Version 7



### Benefits

- Easy choice of DocuWare components to install using server roles
- Intuitive user guidance in significantly fewer dialogs
- Greater stability of the setup: more preconditions are checked right from the start and, after each intermediate step, there is transparent feedback to the user. 'Retry' also possible with failed intermediate steps.
- Easier system expansion and installation of distributed systems

## 2 Perfect Information Capture Made Easier

Information capture is always the first, fundamental step for document management and office automation. DocuWare offers a lot of options and tools to make this step largely automated, without time-consuming, monotonous data entry. With Version 7, there are many more new features, such as automatic indexing with Autoindex to simplified data entry in forms.

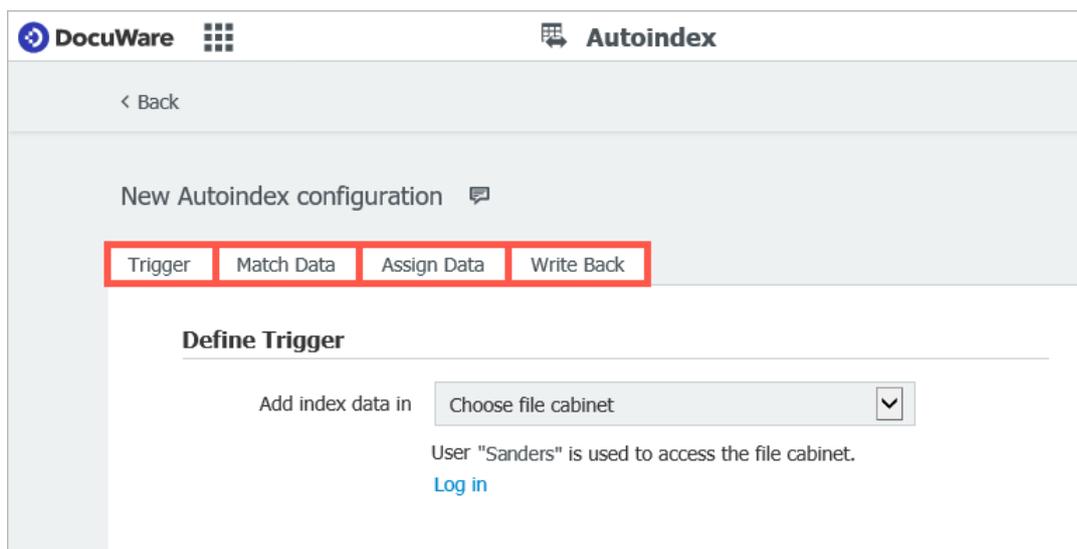
### 2.1 Autoindex: new interface

**Component:** DocuWare Configuration > Autoindex

As part of the transition to a new, modern technology (on page 5), the Autoindex interface was redeveloped. Autoindex is now configured in the Index section of DocuWare Configuration, instead of in DocuWare Administration as before.

In addition to significantly increased performance, especially when processing large volumes of documents, Autoindex now offers a very simple setup. All the settings you need to automatically complete index data from external data sources are laid out in a clear and comprehensible way.

Also new is the launch of Autoindex for file cabinet events (on page 10), such as the storage of documents or changes to index data. Index entries in the file cabinet can also be monitored and changed (on page 11) without having to first configure the file cabinet as a new data source.



*Configure an Autoindex job from the start condition to the writing back of index data in just 4 steps.*

## 2.2 Start Autoindex for a specific document

Component: [DocuWare Configuration > Autoindex](#)

Documents that are fully indexed in the file cabinet from the outset can significantly speed up a workflow. To easily configure this, Autoindex (on page 9) now offers the additional *File Cabinet Event* start condition. With just one click, for example, you specify that Autoindex should start when a new document is stored.

### Application

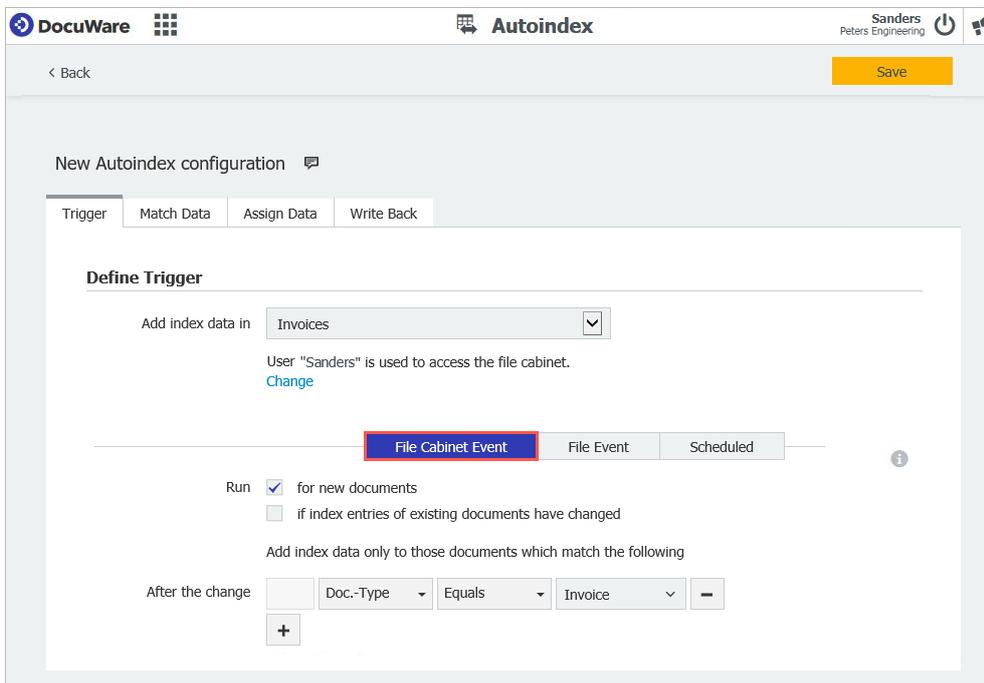
- When an invoice is stored in DocuWare, Autoindex will start immediately and complete the invoice posting information with data from the ERP system

### Benefits

- Rapid completion of index data
- Document is fully indexed from the beginning
- Simple configuration of the start condition
- Optimization of operational processes
- Integrations based on index values can be used immediately. For example, the display of a document in DocuWare directly from the ERP system via a Smart Connect button.

### How to

Under *DocuWare Configuration > Autoindex*, select *File Cabinet Event* as a start condition. Use the options and the filter to specify the criteria by which Autoindex should index documents.

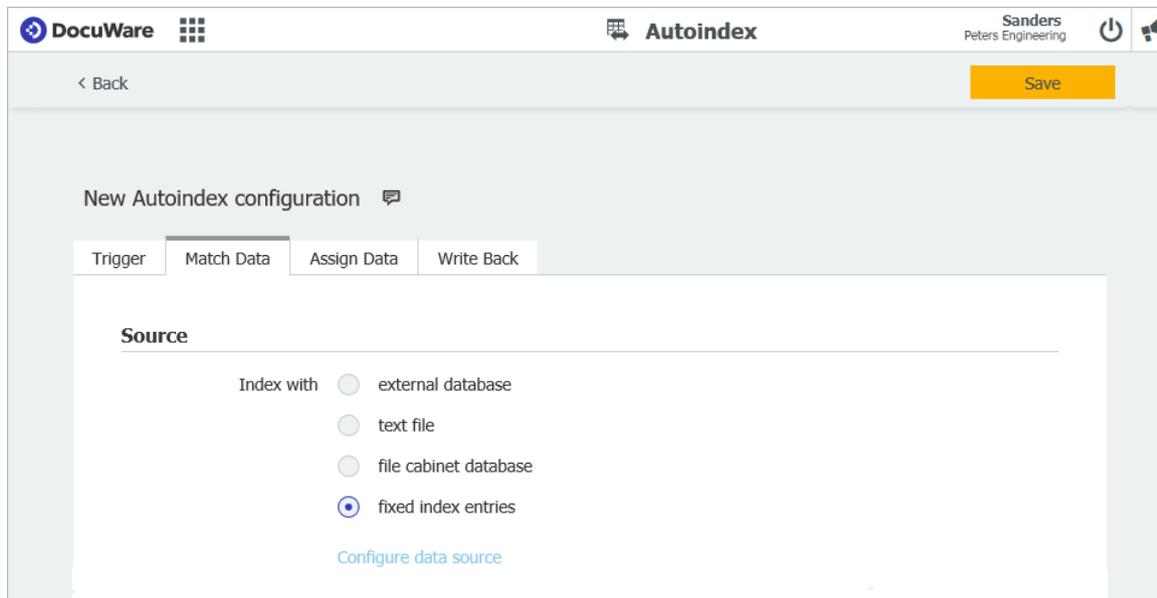


The screenshot shows the 'Autoindex' configuration page in DocuWare. At the top, there's a navigation bar with 'DocuWare' and 'Autoindex' labels, and a user profile for 'Sanders Peters Engineering'. Below the navigation, there's a 'Back' button and a 'Save' button. The main content area is titled 'New Autoindex configuration' and has four tabs: 'Trigger', 'Match Data', 'Assign Data', and 'Write Back'. The 'Trigger' tab is active, showing the 'Define Trigger' section. In this section, 'Add index data in' is set to 'Invoices'. Below this, it says 'User "Sanders" is used to access the file cabinet.' with a 'Change' link. There are three radio buttons for the trigger type: 'File Cabinet Event' (which is selected and highlighted with a red box), 'File Event', and 'Scheduled'. Under 'Run', the checkbox 'for new documents' is checked, while 'if index entries of existing documents have changed' is unchecked. The 'After the change' section has a dropdown for 'Doc.-Type' set to 'Invoice', with 'Equals' selected in the comparison dropdown. There is a '+' button to add more criteria.

## 2.3 Monitor and automatically change index entries

Component: [DocuWare Configuration > Autoindex](#)

In addition to transmitting index data from external data sources, Autoindex can also be used to monitor index data from archived documents and to change it without specifying any other data source. This can be conveniently configured with the new Autoindex: Simply select the option *Index with ... fixed index entries* under *Source* in the configuration:



### Application

Autoindex searches the file cabinet for any contracts with a term of less than four months, and sets the status of these documents to Check. The responsible employee is then informed - by a previously set up DocuWare notification - so they can renegotiate or terminate the contracts in a timely manner.

## 2.4 Validation service checks form entries

### Component: DocuWare Forms

The validation service can now also be used for forms. This means that data entered into the form can automatically be checked for accuracy and even compared with external data sources. Only if the entries meet the criteria in the validation service will the form be submitted.



#### Applications

- The validation service checks whether the customer number in the order form matches the customer name in CRM.
- In order to avoid duplicate registrations, the registration form will only be stored in the file cabinet if the entered email address is not yet available in DocuWare in combination with this registration.
- The validation service compares the current date of the submission with the user's specified date of birth. Only if the user is of legal age will the registration be saved.



#### Benefits

- Only valid index values are stored in the file cabinet
- If an entry does not meet the requirements, the user is immediately notified so corrections can be made
- External data sources such as CRM are available for validation



#### How to

The URL to the validation service is saved in the file cabinet configuration in the settings of a store dialog (*DocuWare Configuration > File Cabinets > Dialog > Store*). To use validation for a form, select this store dialog in the *Output* section of the form configuration.

## 2.5 Input masks for form fields

### Component: DocuWare Forms

Formats help the user fill out forms correctly. The form will not be submitted until the inputs match the format definition.

### Questionnaire

**Salutation**

**First name**  **Last name**

**Street**  **House number**

**Zip code**  **City**

**Phone**

**Email**

*In the fields for which a format is stored, examples for the correct input are displayed*

### Application

- The personal information form uses a format to define how the Social Security, pension insurance number, email address, or phone numbers should be entered. If the input does not match the field mask definition, the user is notified so that the entry can be corrected.



### Benefits

- Data is always entered correctly, no check required
- Data such as telephone numbers are spelled consistently in the whole organization
- Forms are easier to complete



### How to

Field masks are available for single-line text fields. Drag one into the form designer and select the desired field mask from the dropdown list in the field properties. All field masks of your organization are available.

You can create a new field mask in DocuWare Configuration under *Indexing Assistance*.

## 2.6 Show and hide form fields with logic

### Component: DocuWare Forms

Behaviors allow a form to display fields or change field properties such, as *Read-only* and *Required*, depending on user input.



### Applications

- When completing the personal information form, a new colleague chooses the option: "Married". In this case, the fields for their spouse's information are displayed.
- Only if the user fills out the option "With overnight stay" for a registration is the field with options for "Single room" and "Double room" displayed. To make sure that the user selects a room type, this field is also set to *required*.
- The customer and landlord fill out a contract on the tablet. Once the customer has signed, all fields in which data was entered are read-only so that no further changes can be made.

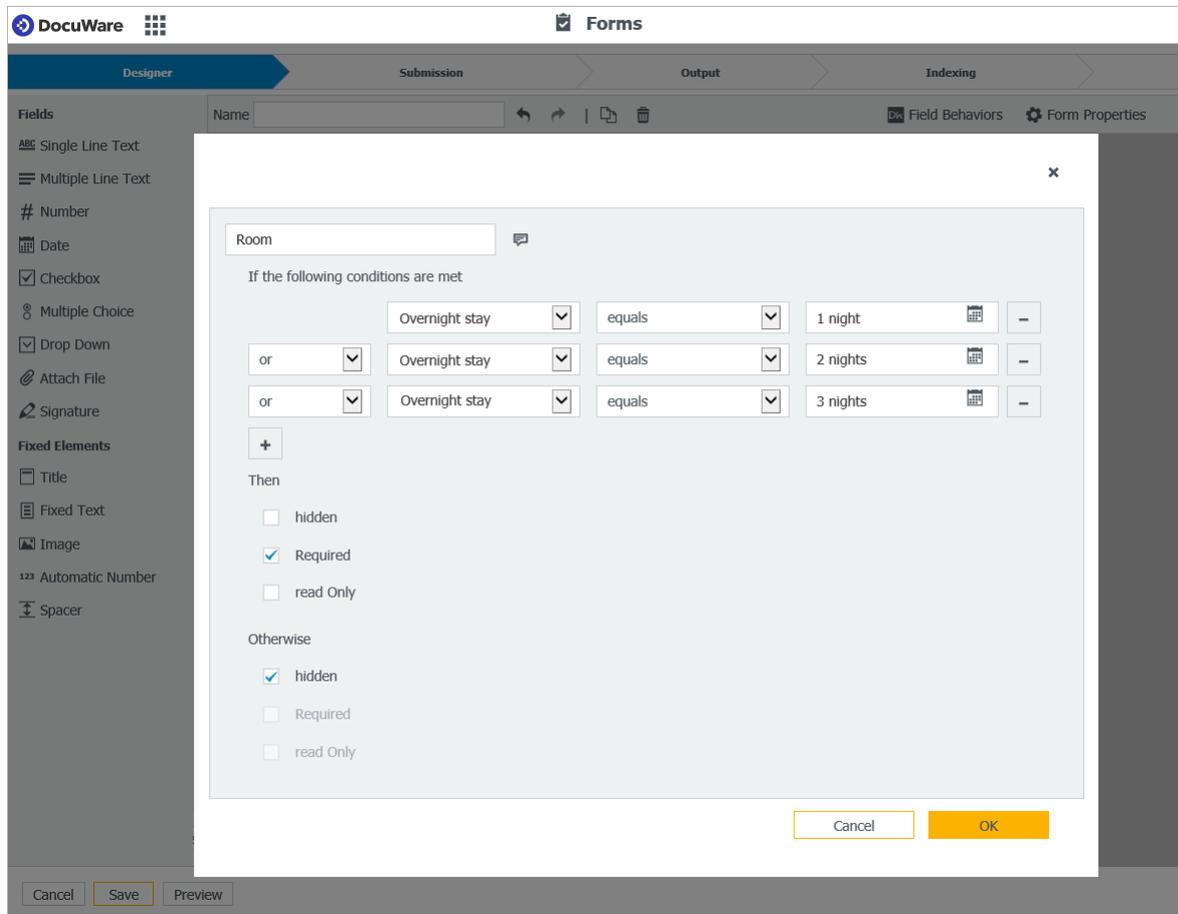


### Benefits

- Transparent: the user only sees relevant fields
- A web form is only created once with all the necessary fields and options – even if they are not used for all users

 How to

To define a field behavior, click *Field Behavior* > *New* under *DocuWare Configuration* > *Forms* > *Designer*. Select one or more fields on whose content the behavior should depend. Configure the conditions for when the field is hidden, required, or read-only. You can check the new field behavior in the form preview.



The screenshot shows the DocuWare Designer interface with the 'Field Behaviors' configuration window open for a field named 'Room'. The configuration is as follows:

Condition	Operator	Value	Action
Overnight stay	equals	1 night	-
or			
Overnight stay	equals	2 nights	-
or			
Overnight stay	equals	3 nights	-

**Then:**

- hidden
- Required
- read Only

**Otherwise:**

- hidden
- Required
- read Only

Buttons: Cancel, OK

## 2.7 Links and formatted texts for forms

### Component: DocuWare Forms

Description text in forms make it easier to fill them out. You can format the texts so that even longer passages are easy to read. Important terms can be underlined, displayed in italics or bold, or paragraphs separated by alignment. It is also possible to include a link to further information.

### Registration for the Information Seminar

Take part in our [detailed information seminars](#) to keep you *up to date*.

**Salutation**      **First name**      **Last name**  
 Fr.              
 Hr.

**Street, House number**      **Zip code, City**  
     

**Email**      **Phone**  
     

**Subjects:**

Workflow  
 Integrations

**Workflow**

DocuWare delivers **document management** and **workflow automation software** that enables you to digitize and optimize the processes that power the core of your business. By removing the tedious, manual tasks that drain your team's energy, your knowledge workers are free to focus on the projects that drive productivity and profit. Set a new pace for business with *DocuWare office automation solutions*.

**Integrations**

DocuWare can integrate into virtually any application so documents and other critical information can **be accessed with ease**. Integration happens through simple wizard-led **configuration**, special DocuWare connectors, or programming via [standard interfaces](#).

Further information can be found on our [website](#).

### Benefits

- Better readability promotes easier understanding of what is required for a field
- Embedding of further information for clarity, i.e. general business terms
- Easy-to-use text editor enables faster input with needed emphasis

### How to

Under *DocuWare Configuration > Forms > Designer*, enter a field for *Fixed text*. To open the text editor, click *Edit text* in the field properties. Changes can be previewed after saving.

## 2.8 Write protection for forms with merge forms

Component: DocuWare Forms

When you create a form that is linked to a merge form, during the configuration, specify that the completed forms cannot be changed once they have been placed in the file cabinet.



### Application

- The draft of a lease is sent to the customer for approval. The form is read-only so that none of the draft entries can be changed.



### Benefit

- Form protected against manipulation after storage in file cabinet



### How to

Under *DocuWare Configuration > Forms > Merge Form Output* in the *PDF properties* section, select the *No (flattened PDF)* storage option.

## 2.9 Intelligent storing instead of email duplicates

Component: DocuWare Configuration > Connect to Outlook

Connect to Outlook can use the unique message ID from the mail system for indexing. This ensures that an email is not stored multiple times. If no ID is found by the mail system, Connect to Outlook uses the sender and timestamp as a message ID.



### Application

- An email for a project is sent to several colleagues at the same time. In the past, all colleagues could archive this email which meant that the subsequent search caused confusion with all the copies that came up in the result list. Now with the new option, you ensure that the email can only be filed one time and since there are no duplicates in the file cabinet, you only get a real hit when you search for the email.

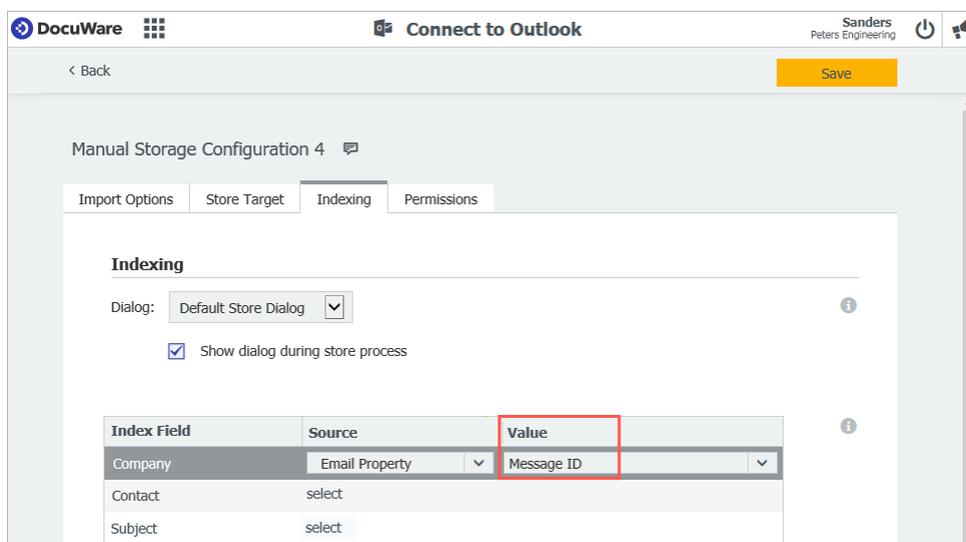


### Benefits

- Automatically prevent email duplicates in the file cabinet
- Clear results when searching for emails

 How to

Each email has a unique message ID within a mailing system. This is now available as a further email property in the configuration of Connect to Outlook. Assign this message ID to a field of DocuWare that is defined as "unique." This means that the entry in this field may only appear once in the file cabinet. When the message ID of an email is present in the file cabinet, emails with the same ID cannot be stored again in the same file cabinet.



## 2.10 Printer and Import configurations become "Document Processing"

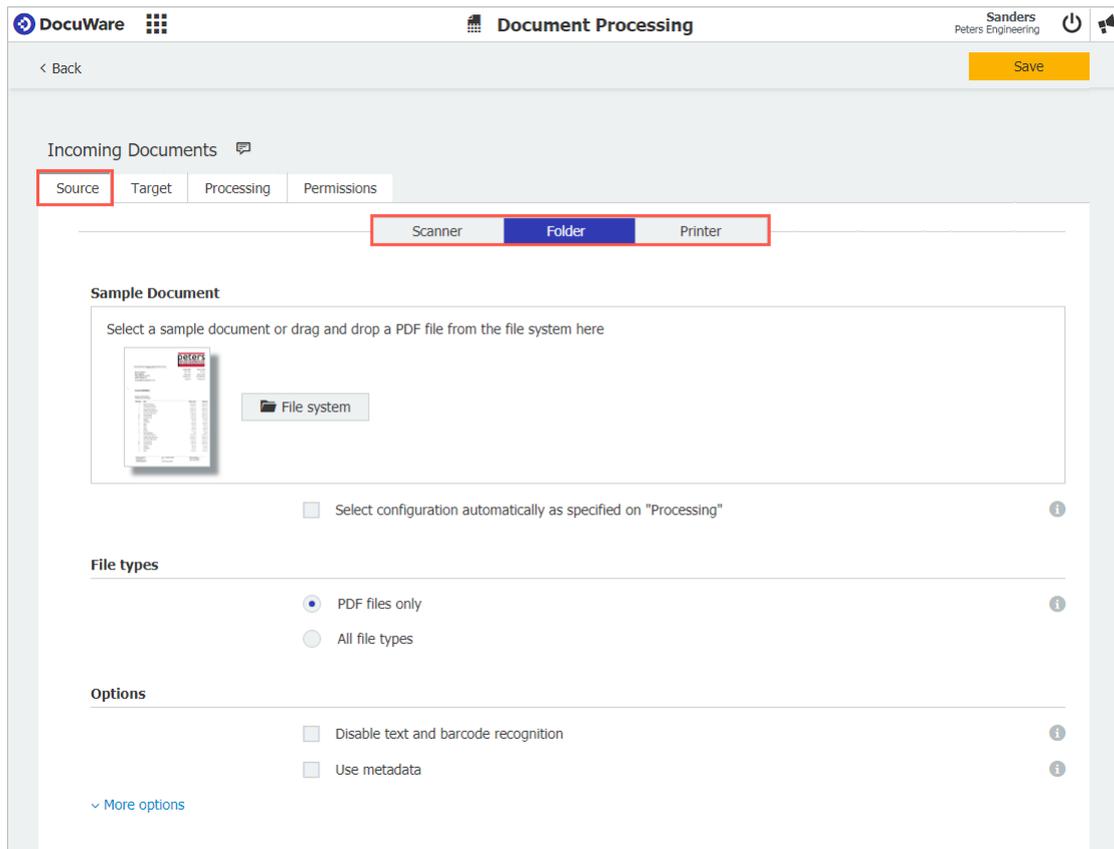
### Component: DocuWare Configuration

You can conveniently store your documents in DocuWare. You can print and store the documents with DocuWare Printer from your applications. Or you can scan documents, e.g. incoming invoices, and archive them automatically with DocuWare Import.

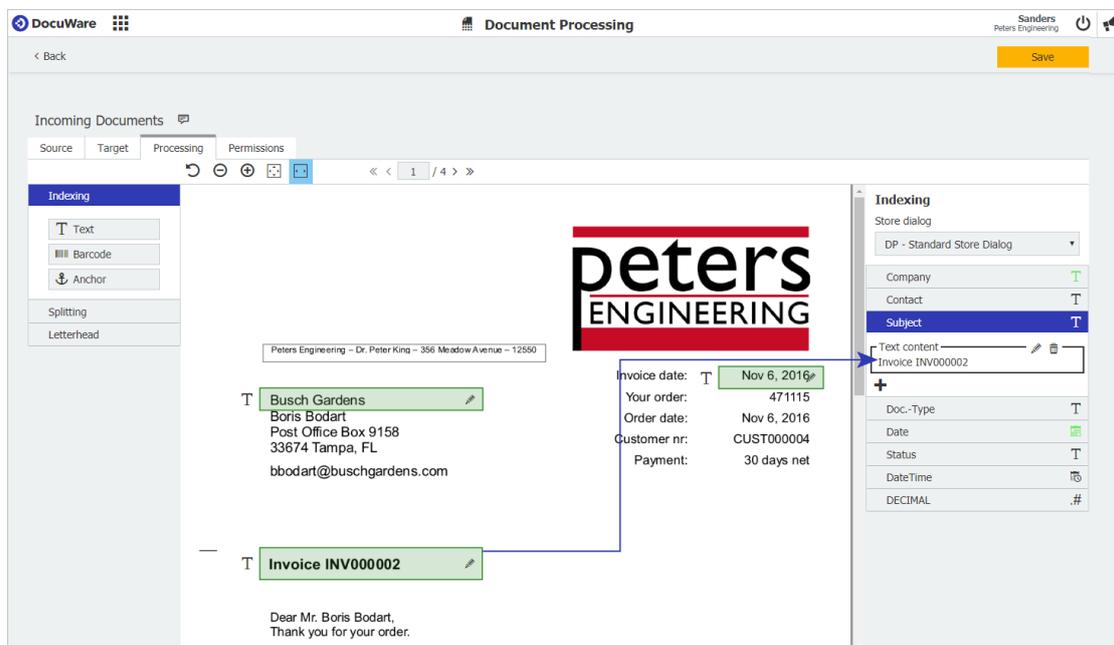
Create and edit configurations for Printer and Import together in the completely redesigned *Document Processing* module in the DocuWare configuration. This is more modern and intuitive. You can switch between the scanner, folder, and Printer source types at any time.

A new processing configuration is always defined in four steps:

1. Select the source type. Depending on this, you will see the appropriate options in the next steps.



2. Determine the store target and, if necessary, email dispatch, and electronic signature.
3. Determine how the documents should be processed. This includes indexing.



4. Finally, assign authorizations for the individual configurations to the users, in the same way as in other modules.

## New features in the "Document Processing" module

- **New operator:** When splitting pages, "Is not empty" is also available as an operator for text readout areas.
- **More rules for automatic selection of the configuration:** There are now three options for identification rules instead of the previous two:  
The storage profile is used if:
  - *all conditions are fulfilled:* all file conditions and all content conditions are fulfilled.
  - *one condition is fulfilled:* one of the file or one of the content conditions is fulfilled.
  - *all file or all content conditions are fulfilled:* at least all file or all content conditions must be met.
- **Import and export of configurations:** Processing configurations are imported or exported as .JSON files. Configurations that were exported with DocuWare Version 6.12 or earlier as XML file cannot be imported with DocuWare Version 7.



### Advantages of the new module

- Even more intuitive to use
- The interface is completely based on HTML5
- Selection according to source type reduces the display of active functions
- Desktop Apps: *Scan* and *Import* only show the relevant configurations



### How to

The configurations are called up within the DocuWare Configuration, in the *Capture* section.

## 2.11 More amount fields for Intelligent Indexing

There are two new fields for Intelligent Indexing: *Custom Amount 3* and *Custom Amount 4*. Together with the already existing *Custom Amount 1* and *2* field, there are now four different fields for the automatic reading of different amount types.



### Application

- With Intelligent Indexing, you can now read up to four different amounts from invoices and use them as index terms. For example, in addition to the net amount and the gross amount, you can also use various tax amounts



### Benefits

- More extensive automatic reading of relevant document content
- Enables better data capture for further usage, i.e. reports

 How to

### Assign dialog fields to Intelligent Indexing fields

The dialog fields will be pre-filled with the terms from Intelligent Indexing.

Dialog field	Intelligent Indexing fields
Document Type	Document Type
Company	Sender
Contact	Recipient
Email	E-Mail
Amount	Amount
Date	VAT Id
Subject	Subject
Subject	Custom Text 1
Project	Custom Text 2
	Custom Text Selection Only 1
	Custom Text Selection Only 2
	Custom Amount 1
	Custom Amount 2
	Custom Amount 3
	Custom Amount 4

+

You configure Intelligent Indexing within the desired store dialog. The two new fields are available when selecting the Intelligent Indexing fields.

## 3 Additional New Features and Usability Improvements in Version 7

### 3.1 Using DocuWare

#### 3.1.1 Easier DocuWare login with DocuWare Cloud

##### DocuWare Cloud

Logging in to the DocuWare Web Client has now become much easier for cloud customers: User name and password are sufficient. It is no longer necessary to specify the DocuWare organization, since each DocuWare Cloud customer system has a specific URL.

#### 3.1.2 Close scan preview even faster

##### Component: DocuWare Desktop Apps

To close the scan preview, you now have an additional option: simply click on the background of the interface. The *Close* button is also still available.

#### 3.1.3 New names for workflow users

##### Component: Workflow Manager

The names of the system variables have been renamed to be more user-friendly:

- The variable "Current user" is now called "Last decision user"
- The variable "User of the task" is now called "Logged-in user"

#### 3.1.4 View document and history for completed workflow tasks

##### Component: Workflow Manager, Web Client

You can even display the document and the workflow history for a completed task that you open using a link received by e-mail, for example. In retrospect, all the decisions made can be followed.

### 3.1.5 Error management during automatic workflow decisions

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

If there is an error in an automatic decision when completing a task, the workflow designer receives a task with a description of the error and appropriate decision options:

- Repeat activity: the activity goes through the workflow again
- Finish workflow: the activity fails and the workflow finishes
- Continue with activity "[name of next activity]": the failed activity is skipped and the system goes to the next activity

## 3.2 Configure and manage DocuWare

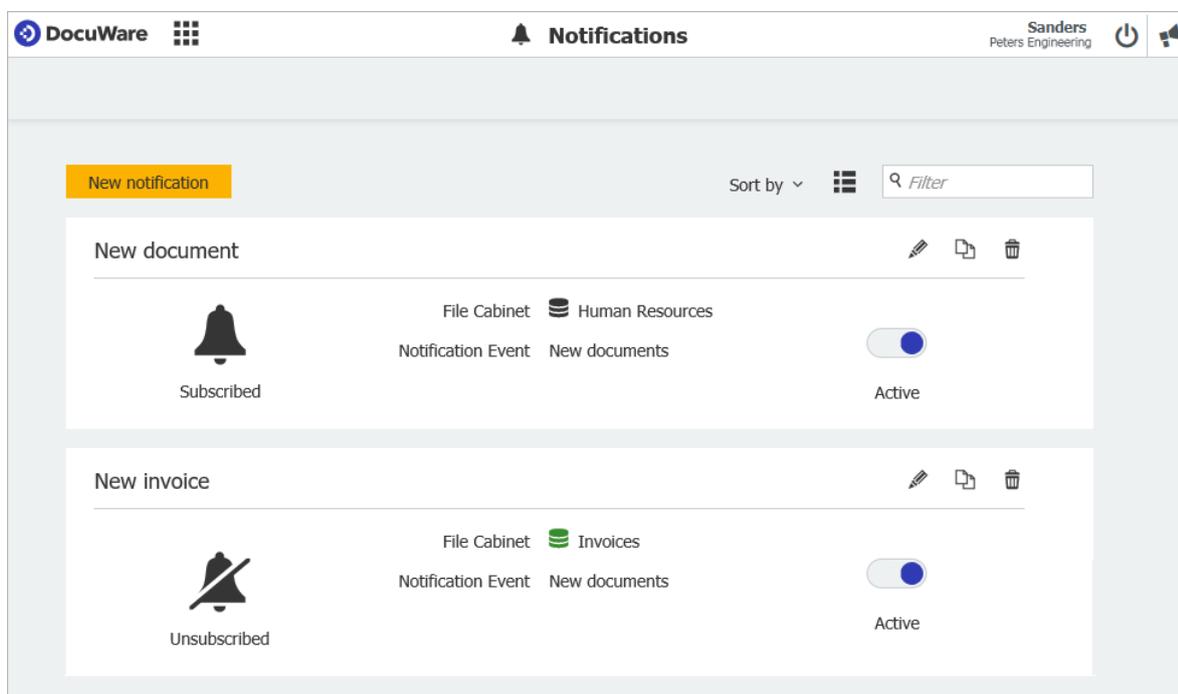
### 3.2.1 Clearer DocuWare Configuration

Component: [DocuWare Configuration](#)

With DocuWare Version 7 the conversion to HTML5 technology is almost complete and therefore also the move of most modules into the DocuWare configuration. For more clarity, additional categories have been added and the modules rearranged:

DocuWare	Configurations				
General	 User Management	 Audit Reports	 Mail Services	 Text Recognition	
Capture	 Document Processing	 Forms	 Connect to Outlook	 Connect to Mail	 Connect to...
Index	 Indexing Assistance	 Intelligent Indexing	 Autoindex		
Document Storage	 File Cabinets	 Document Relations	 Deletion Policy	 Synchronization	 Transfer
Collaboration	 Notifications	 Request			
Personal	 Document Trays	 Email Accounts			
Integrations	 Smart Connect				

For the modules *Indexing Assistance*, *File Cabinets*, *Document Relations*, *Notifications* and *Document Trays*, there is a block view in addition to the table view. The most important key data of a configuration can be seen directly in the overview of the configurations; larger symbols support this clarity.



*Notifications in block view with large symbols*

### 3.2.2 New module: Audit Reports

**Component:** DocuWare Configuration, Web Client

With the new Audit Reports, you have full transparency of what is happening in your DocuWare system. Be it at the document, file cabinet, organizational or system level – with the appropriate authorization, you can see, for example, who changed which settings or when they stored the documents. All Audit Reports can be downloaded in universal CSV format and used for evaluations in many programs.

Examples of events logged at each level, including date, time, and user:

**Document:** Store, index change with old and new value, display, print, annotate, etc.

**History**

Workflow Document

Document history for "IV91730913" with ID 1 Download as CSV

Date	User	Event	
03/04/2018 11:59	Ford	Open	
03/04/2018 11:58	Ford	Open	
03/04/2018 11:57	Ford	Open	
03/04/2018 11:52	Huber	Print	
03/04/2018 11:52	Huber	Edit Index Data	
03/04/2018 11:52	Huber	Open	
03/04/2018 11:51	Huber	Open	
03/04/2018 11:50	Huber	Open	
03/04/2018 11:40	Cash	Email	
03/04/2018 11:40	Cash	Open	
03/04/2018 11:39	Cash	Open	
03/04/2018 11:39	Cash	Export	
03/04/2018 11:39	Cash	Open	
03/04/2018 11:39	Cash	Store	

**OK**

*The Audit Reports for the document within the Web Client*

**File cabinet:** New index fields, changes to search and store dialogs as well as result lists, new file cabinet profiles, etc. Also all document events within the file cabinet.

**Organization:** New configurations and changes to existing configurations, user login and logout (disabled by default).

**System:** Changes to server settings, changes to schedules for automatic processes such as transfer, deletion policies, synchronization.

 **Audit Reports** Sanders Peters Engineering

**Save**

**Organization**

Name	Configuration changes	User Login/Logout	No. of Entries
Peter Sanders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1723

**File Cabinets**

Name ^	Configuration changes	Document Events	No. of Entries
Invoices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6
Human Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5
Docupool	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5

*The Audit Reports for the system, organization and file cabinet levels are opened within the DocuWare Configuration*

 **Applications**

- Evaluation of activities within DocuWare:
  - How often is a particular document accessed?
  - Who deleted a specific document?
  - Who changed a specific configuration, and when?
- Demonstrate compliance with compliance guidelines

 **Benefits**

- Transparency of everything that happens in your DocuWare system
- Easy evaluation of Audit Reports with universal CSV format

 **How to**

You open the document Audit Reports in Web Client via the context menu of the document, for example within the result list. The menu item is called *History*. The Audit Reports for the file cabinet, organization, and system is called up within the DocuWare Configuration, in the *General* section.

To be able to open a document Audit Reports, you need the new file cabinet right *Show document history* for the corresponding file cabinet. This right is not included in any of the predefined profiles.

In order to be able to access Audit Reports for the system, organization, or file cabinet, you must have administrator rights at the respective level.

### 3.2.3 New module: Document Transfer

**Component:** [DocuWare Configuration > Transfer](#)

The new Transfer module replaces the Export workflow in DocuWare Administration. Transfer jobs can now be set up in the DocuWare Configuration. Transfer is particularly useful for copying or moving large volumes of documents from an on-premises system. The selected target file cabinet can be located in another organization in DocuWare Cloud or in another on-premises DocuWare system.

Unlike in the Export workflow, all document versions can be transferred with Transfer – provided version management is enabled for both file cabinets. In addition to the index entries, a transfer also includes the system entries and the fulltext information.

 **Application**

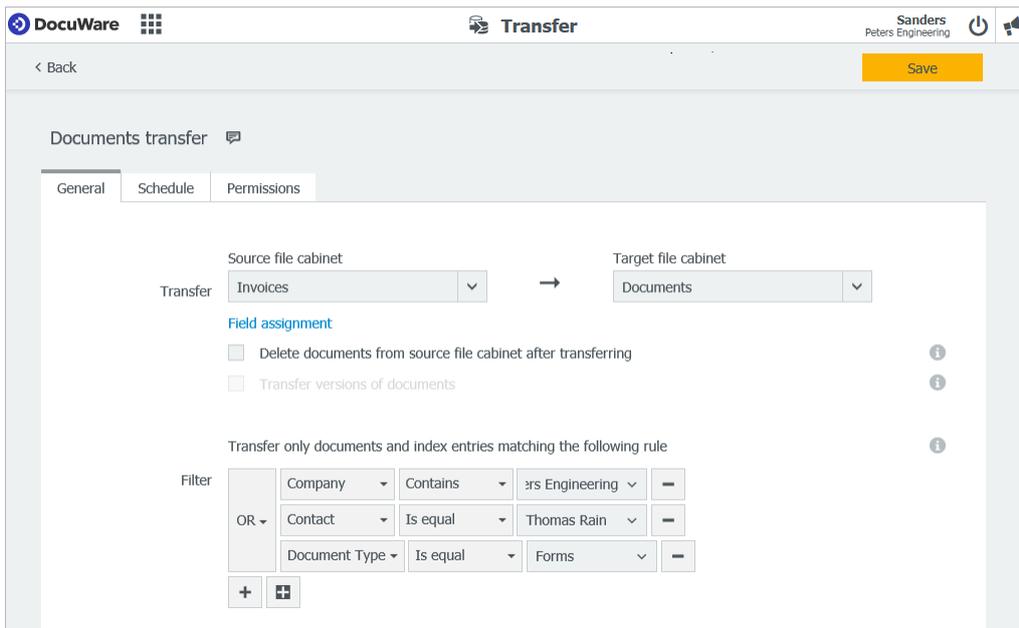
- In your DocuWare system with Business license, the file cabinet size is limited to four gigabytes. To lift this limit, move your documents to the cloud. With Transfer, you merge the existing file cabinets from the on-premises system into a large cloud file cabinet. You can assign the index values in the new file cabinet.


**Benefits**

- Convenient mass transfer of documents
- The user who originally saved the document and the date are retained
- Simple configuration of a transfer job


**How to**

*Transfer* is available on on-premises systems from DocuWare Version 7. Access the module in the *System* section of the DocuWare configuration.



Use the filter in the "General" tab of the Transfer module to specify exactly which documents you want to transfer.

### 3.2.4 New function right "Document Processing"

**Components:** [DocuWare Administration](#), [DocuWare Configuration](#)

In line with the changed Configuration (on page 18), the function rights *DocuWare Printer* and *Import Configurations* have been consolidated into a new function right *Document Processing*. This new right is standard for all users and profiles that previously had the *DocuWare Printer* and/or *Import Configurations* rights.

You will find the function rights within the *User Administration* in the *DocuWare Configuration*, and in the organization area of the DocuWare Administration under *User Management > User / Function Profile > Functions*.

### 3.2.5 Document tray for automatically imported users

Component: [Document trays](#)

If users are automatically taken over into DocuWare via Active Directory or another interface, a new document tray is automatically created for each user. The document tray is immediately available when the new user logs in to DocuWare Client for the first time.

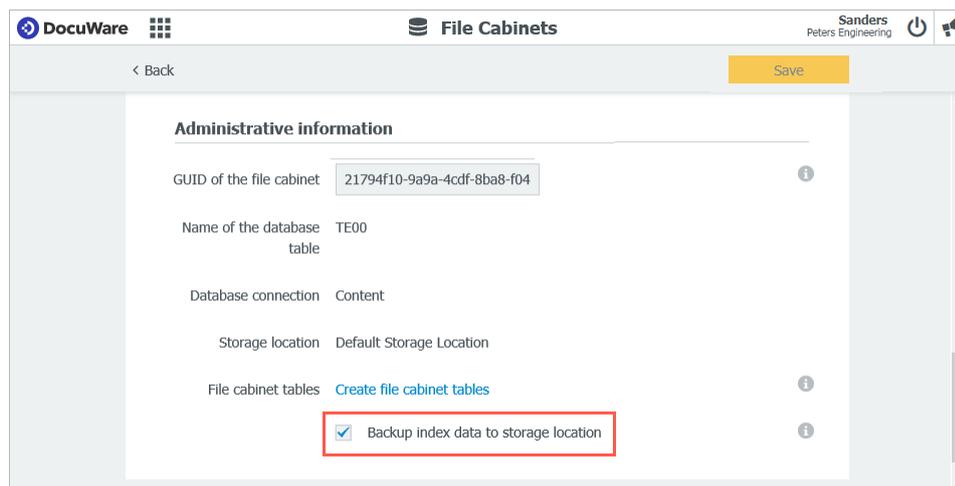
### 3.2.6 Redundant backup of index data in DWX files

Component: [DocuWare Configuration > File cabinets](#)

The complete metadata such as index data, annotations, stamps, and signatures are now stored in the database and can be restored via the database backup should hardware damage occur. Therefore, the header files [help.docuware.com/en/#t60939](http://help.docuware.com/en/#t60939) are no longer generated automatically with DocuWare Version 7.

You can, however, save the metadata in addition to the database backup as DWX files in the storage location of the file cabinet. To do this, in the file cabinet settings under *General > Administrative information* activate the option *Index data backup in the storage location*.

The files are generated in the background and no longer in sync with the action in the Web client, which ensures better performance.



### 3.2.7 Change standard fields when creating a file cabinet

Component: [DocuWare Configuration > File cabinets](#)

When a new file cabinet is configured, the default fields can now be changed. You can rename the field and choose a different field type: Text, Numeric, Comment, Date, Keyword, Decimal, Date/Time.

### 3.2.8 Registration for DocuWare Administration via Desktop Apps Authentication

Component: **DocuWare Administration**

In addition to *DocuWare Authentication* and *Windows Authentication*, there is now a third option for logging into DocuWare Administration: *Desktop App Authentication*. You can use this to log in without entering a password. *Desktop Apps Authentication* is available if Desktops Apps are installed and a connection is active.

### 3.2.9 Changed System Requirements

Compared to DocuWare Version 6.12, there are the following changes to the system requirements:

- Office 2010 is no longer supported for Connect to Outlook
- .NET 4.5 or higher is required to start a DocuWare Request created with DocuWare Version 7.

To upgrade to version 7, you need at least a DocuWare version 6.7 installation.

As always, the complete [system requirements](#) can be found in the Knowledge Center.