

What's new in DocuWare version 7.6

All new features, along with areas of application, benefits for users, and notes on configuration



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Contents

1.	Better networked through integration.	4
1.1	Sharing DocuWare links with Microsoft Teams.	4
1.2	Save straight to the file cabinet with DocuWare Mobile.	5
1.3	Adapt data export more precisely to requirements of target system.	6
1.4	Selectable encoding type for CSV files.	8
1.5	Webhooks: Connection test for data messages.	9
1.6	Integration links with credentials remain active.	11
2.	For daily work with DocuWare.	12
2.1	Adding rows for table fields.	12
2.2	Sending a document with improved option selection.	13
2.3	Filtering select lists of form fields.	13
2.4	Full support for Chinese.	16
2.5	XML invoice standard for Colombia.	17
3.	Workflow innovations.	18
3.1	Task list: display functions as for the result list.	18
3.2	Indexing table data more flexibly.	19
3.3	Workflow history displays processors directly.	21
4.	What's new in configuration.	22
4.1	Defining full-text language per file cabinet.	22
4.2	More security through dependency checking for file cabinets.	22
4.3	Dynamically control permissions for user roles and groups.	23
4.4	User login/logout details for audit reports	24
4.5	Better performance with modified scheduling.	24
4.6	Using email attribute for user synchronization.	25
5.	Technical information.	26
5.1	Modified system requirements.	26
5.2	Update to Version 7.6.	26

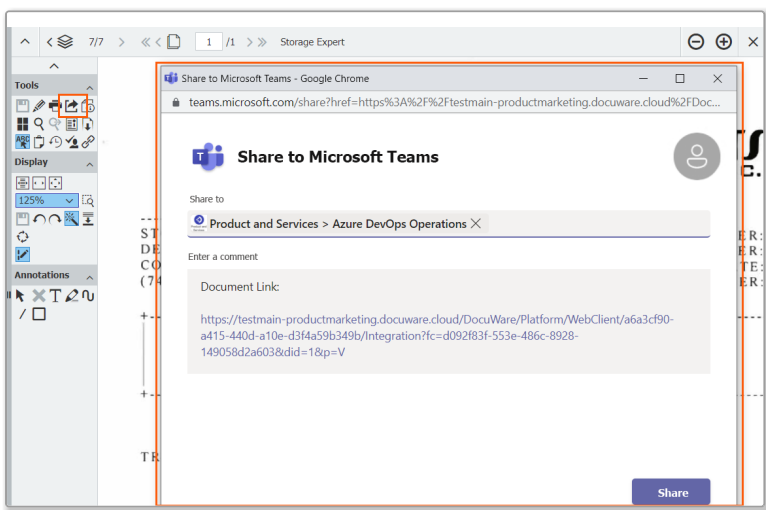
1 Better networked through integration

The exchange of data and documents between people, devices, or systems is essential for smooth-running processes, consistent information, and location-independent working. Therefore, the focus of our new version includes integration functions for automated exchange between DocuWare and third-party software, as well as easy collaboration by sharing archived documents with Microsoft Teams. There has also been a major update of the mobile DocuWare app since the previous release. Take advantage of these new options to better connect your applications for a modern working environment, even when you're away from the office.

1.1 Sharing DocuWare links with Microsoft Teams

Component: DocuWare Cloud > Client

You can post archived documents to a chat or in a Microsoft Teams channel directly from DocuWare via a link.



Applications

- You archive a supplier's offer and make it available to the project group in Microsoft Teams using a DocuWare link.
- Invite all relevant employees to edit an archived document: You share the link in a Teams channel where all members can open the document in DocuWare Viewer and edit the document simultaneously in *Office online*.

Benefits

- You don't have to leave DocuWare to share documents.
- Documents shared via the link remain protected in Microsoft Teams by the permissions defined in DocuWare.

 How to use it

In order to use the feature, go in DocuWare Configuration to the *Organization settings > General > Collaboration* area and activate the *Enable the sharing functionality with Microsoft Teams* option. Then the *Share* function is available in the DocuWare Viewer as well as in the context menu of result lists and lists

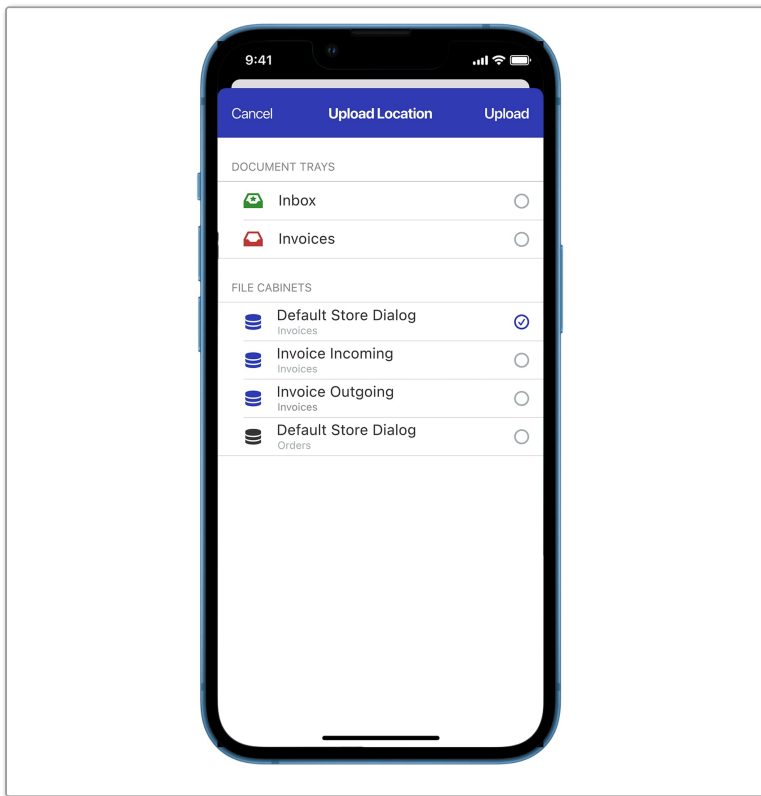
When a document is shared via the link, it remains in DocuWare. Access to the DocuWare system is needed in order to open and edit the document.

The function is available to DocuWare Cloud customers only.

1.2 Save straight to the file cabinet with DocuWare Mobile

Component: DocuWare Mobile

You can now save documents, images, and files from other apps straight to a DocuWare file cabinet using your smartphone sharing function. You can also clip a document from the document tray to an archived document.



 Applications

- Use your smartphone to take photos of receipts during a business trip and send them to the DocuWare app via the sharing function. There you can index the receipts before storing them, and even use Intelligent Indexing. Once archived, the workflow to refund the travel expenses starts immediately.
- The site manager receives a workflow task on their smartphone for invoice approval. The site manager opens the invoice in the DocuWare app and compares the invoice entries with those on the delivery note that was received with the goods at the site. The site manager then takes a photo of the delivery note, places it in the document tray, and attaches it to the invoice as proof of receipt of the goods. The office staff see the approved invoice and can post it with a discount thanks to the short lead time.

 Benefits

- Store in file cabinet right away, skipping the document tray
- More flexibility with access to file cabinet via smartphone

 Version and compatibility

The DocuWare app is compatible with DocuWare version 7.0 and higher and is available for mobile devices running iOS and Android. For older DocuWare versions 6.xx, the DocuWare Classic app will remain in the stores for the time being.

If DocuWare is installed locally, the Mobile license is required for the system. Download the update here:

- For [iPhones](#)
- For [Android smartphones](#)

1.3 Adapt data export more precisely to requirements of target system

Component: Configuration > DocuWare Export

Using DocuWare Export, you can export index data from documents to allow for data transfer to third-party applications. Creating and editing the configurations for this has been greatly simplified and important features have been added. You can now choose from two options: the standard data export in the form of a result list and the export with custom content. With the results list option, the configuration of the columns is omitted in the following steps.

For custom content, you can separate data in index fields into multiple columns to export values separately to fit your external application. Also, data can be transformed during export.

Before exporting, the *Export Preview* button optionally gives you a preview of the file and lets you perform a test export based on that.



Application

- **Separate index field data into columns:** You use selection lists that contain a cost center number and an associated name, such as "40000 - Sales." But you want to export only the number, because this is used in your financial accounting solution. Or a field stores project numbers and names and you want to export both separately, for example "2022-01 - Upside-down roller coaster."
- **Transform data:** You want to replace abbreviations with full names or a field contains the name of a month but you want to export the corresponding number, for example "01" instead of "January."



Benefits

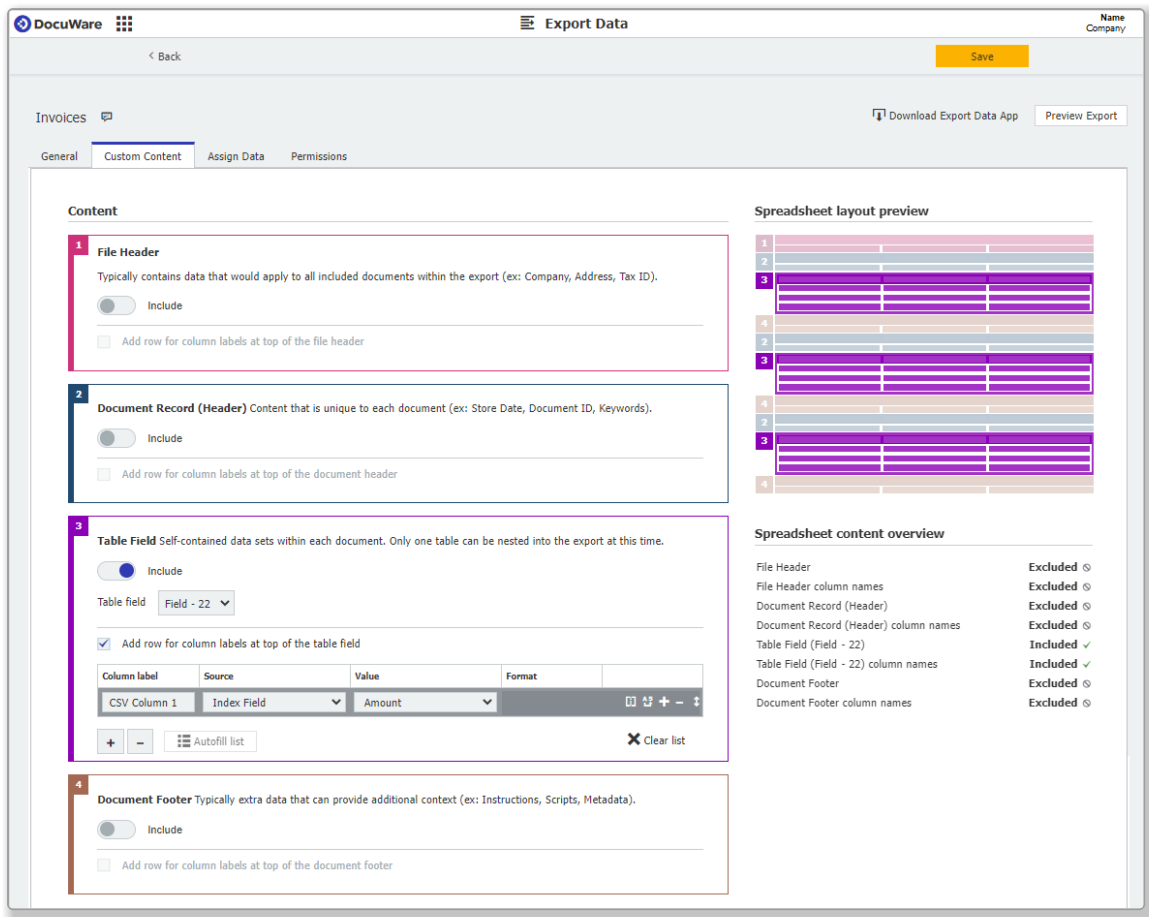
- Optimally adapt data to external applications
- Configure more flexibly and easily
- Export results and table layout each at a glance



Here's how

In DocuWare Configuration > *Export Data* you create a configuration. Under *General* you first choose between an export in the form of a result list and an export with custom content and make further settings, for example for the rules or the encoding.

If you decide to use custom content, edit all the entries for file and document headers, tables and footers on the tab of the same name. You can see the entries displayed in a *Layout preview*. If you mouseover an entry line, the two buttons for *Separate content* and *Transform content* appear. Unlike the *Layout preview* on this tab, the general *Preview Export* gives you a higher-level preview of the file and lets you download it as a test export.



1.4 Selectable encoding type for CSV files

Components: [Web Client](#), [DocuWare Export](#), [Audit reports](#)

DocuWare offers the option of data export via CSV file in various areas: Index data export based on a result list or via [DocuWare Export](#), as well as audit report data and document histories. All CSV exports are now possible with different encoding types. This provides more flexibility for importing the files into third-party applications and accommodates different regional standards. The following types are supported: ANSI, ASCII, Big5, Shift JIS, UTF-16, UTF-8.

Applications

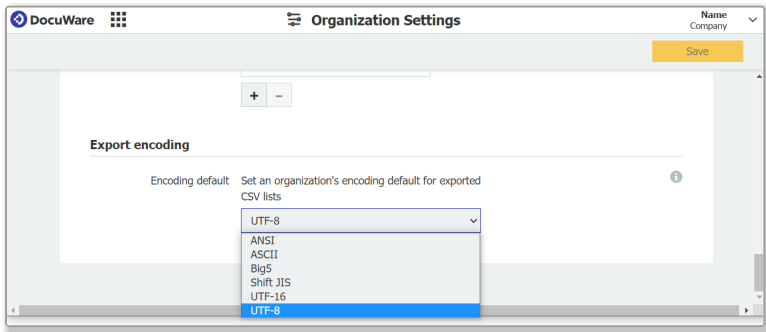
- Shift JIS to support the standard in Japan
- Big5 to support the standard for Chinese speaking countries

Benefits

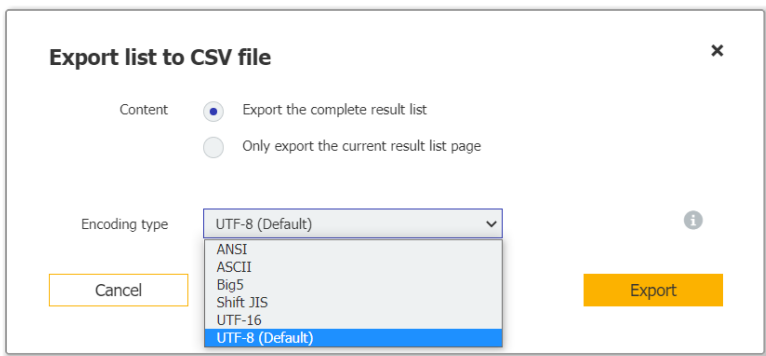
- More flexibility for integration based on data exchange via CSV file
- Support for other regions and languages

 Here's how

The choice of encoding type is made at two levels, as a default for the whole organization and in some areas individually in the case of user-driven export. The default is always used for CSV exports of audit reports and document histories. The default is preselected in the case of CSV export of results lists and when DocuWare Export is used, but a different encoding type can be selected for the individual export.



The higher-level setting is made by your administrator in the configurations within the organization settings, at the very bottom of the General tab



A separate dialog is called up for specifying the export of result lists as a CSV file

1.5 Webhooks: Connection test for data messages

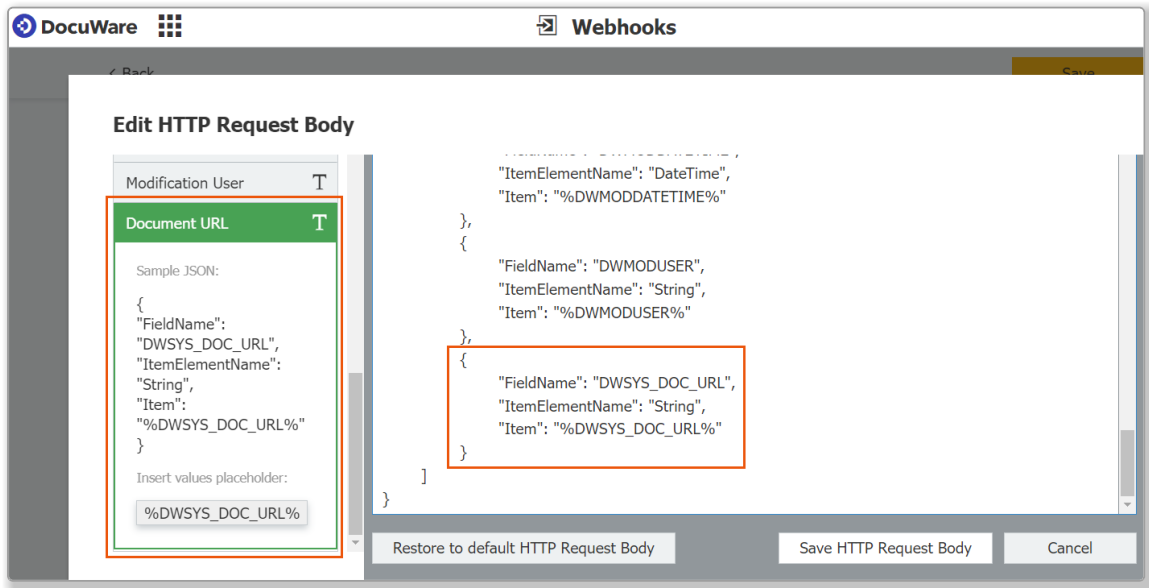
Component: Configurations > Webhooks

Connect your company applications: The financial software automatically receives a message when a new invoice is archived in DocuWare or when an already filed invoice is released for payment. If preferred, the document links to archived invoices, delivery notes, and offers can be supplied at the same time so that staff can access all documents linked to the transaction directly from the financial software.

File cabinet messages like this can be created without much programming effort using the Webhooks module, which has been enhanced with three features for even easier configuration.

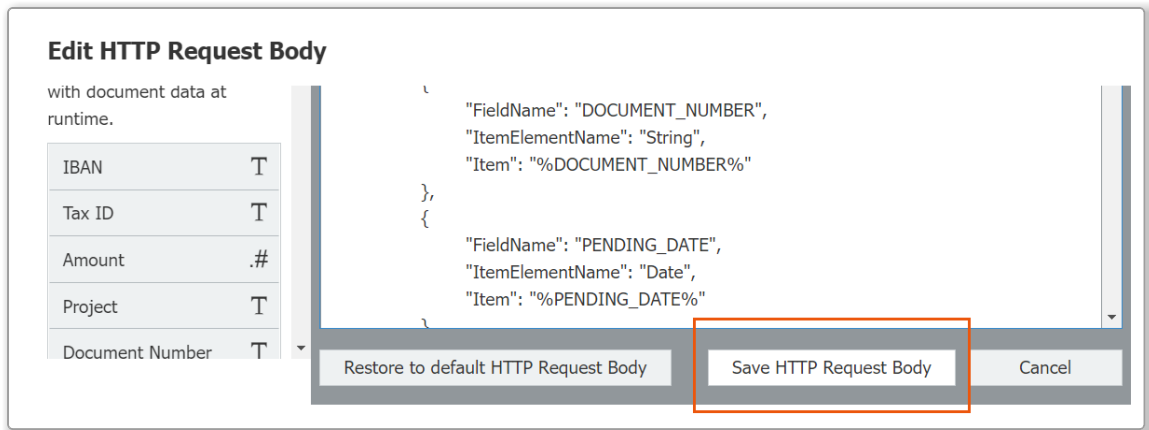
Integrating links easily

To integrate a link to an archived document into a file cabinet message, drag the new *Document URL* placeholder into the JSON editor.



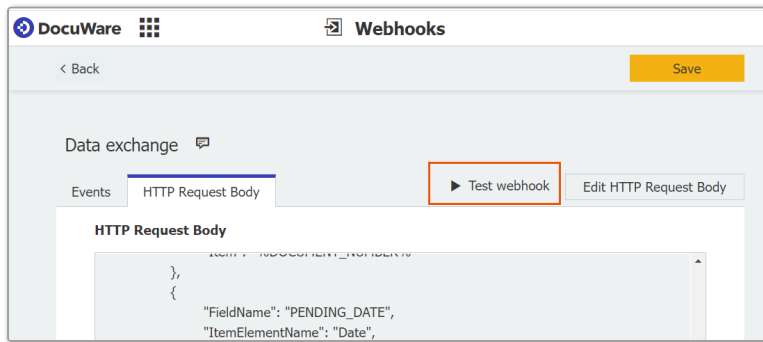
Code validation

When saving the message text, the code is instantly checked. Corrections are done faster than if the validation is done after saving the complete configuration.



Testing connection with a single click

Send a test request with dummy data from the Webhook configuration dialog. This eliminates the workaround of storing or editing documents in a live system for a test.



The button for the test request is located on the HTTP Request Body tab

1.6 Integration links with credentials remain active

Component: URL integration

Authenticated integration links already include username and password. Even users without their own DocuWare account can access archived documents, results list, or other DocuWare elements.

From now on, authenticated integration links are also exempt from automatic logout in case of inactivity. This makes it easier to use: users can continue working at any time without having to click the link again.

2 For daily work with DocuWare

2.1 Adding rows for table fields

Component: Web Client

You now have more options for adding rows in the case of table fields. Previously you could only add new rows at the bottom. Now, you can add them anywhere. You can also duplicate one or more selected rows.



Applications

- Adding invoice items in the table field at any position, e.g. so the sequence is identical to the invoice
- Duplicating table fields for similar invoice items

Items						
1 row selected						
+ Insert Before + Duplicate − Clear ✕ Remove ⌵						
<input type="checkbox"/>	Item	Quantity	Price each	Amount	Cost Center	
<input checked="" type="checkbox"/>	STEEL GIRDER 5M	1,000	320.00	320,000.00	500 - Production	
<input type="checkbox"/>	2 STEEL GIRDER 10M	1,000	600.00	600,000.00	500 - Production	
<input type="checkbox"/>	3 RAIL 5M	500	210.00	102,000.00	500 - Production	
<input type="checkbox"/>	4 BOLT TYPE 50B	2,500	2.80	6,000.00	500 - Production	
<input type="checkbox"/>	+					
Σ		5,000	1,132.80	1,028,000.00		

For table fields: the new options in the toolbar is available as soon as at least one row is selected



Benefits

- Filling out table fields more quickly
- Intuitive handling of tables



Here's how

New empty rows are always inserted above the selected row.

To duplicate, first select the required rows. The new duplicated rows are inserted below each of the original rows and are populated with the content of the original lines.

The new features are directly available for all table fields in store and index dialogs as well as in workflow tasks. They do not need to be enabled or configured separately.

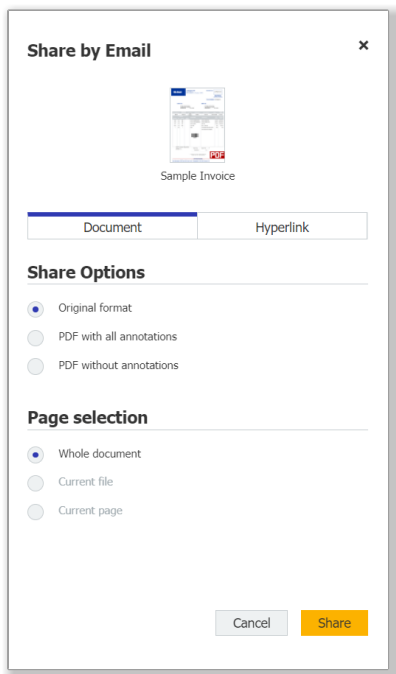
2.2 Sending a document with improved option selection

Component: Web Client

In connection with the new function for [sharing documents with Microsoft Teams](#) (page 4), the *Send document* function has been revised. In the document tray, in lists, and in the viewer, you can now access the function via *Share > By email* (or via *Share by email* if sharing by Teams is not enabled in your organization). A dialog opens to select the format and page selection options.

Benefits

- All *share* functions can be accessed via a menu/icon
- All options for sending mail clearly arranged in a dialog

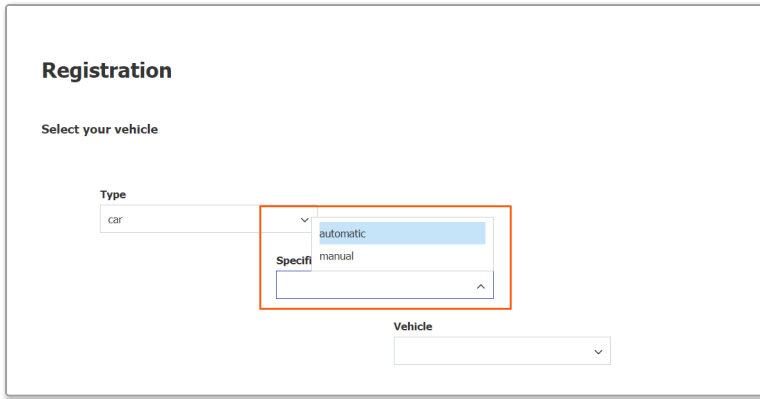


New dialog with the options for sending documents

2.3 Filtering select lists of form fields

Component: DocuWare Forms

Dependent filtering of selection lists is already known from store dialogs: Only those entries from a selection list are displayed that match the entry in another field are displayed. This is now possible for form fields of the "Drop Down" type. If there is only one input option left for the field, it will be inserted automatically.



Example of dependent filtering in a DocuWare web form: Depending on the entry in the "Type" field, other values are available for selection for the "Specification" and "Vehicles" fields.

Applications

- Order:** The team leaders of a company compile the IT equipment for their new employees, step-by-step, in a web form. In each subsequent field, only the values matching the value of the previously completed field are available for selection.
 - Form field 1: type, e.g. notebook
 - Form field 2: specification 1, e.g. display diagonal 45 inches
 - Form field 3: specification 2, e.g. working memory 64 GB F
 - Form field 4: device
- Login:** prospective customers of a driving school also select the vehicle in the online form, for example:
 - Form field 1: car/truck/motorbike
 - Form field 2: specification (manual or automatic for car)
 - Form field 3: available vehicles

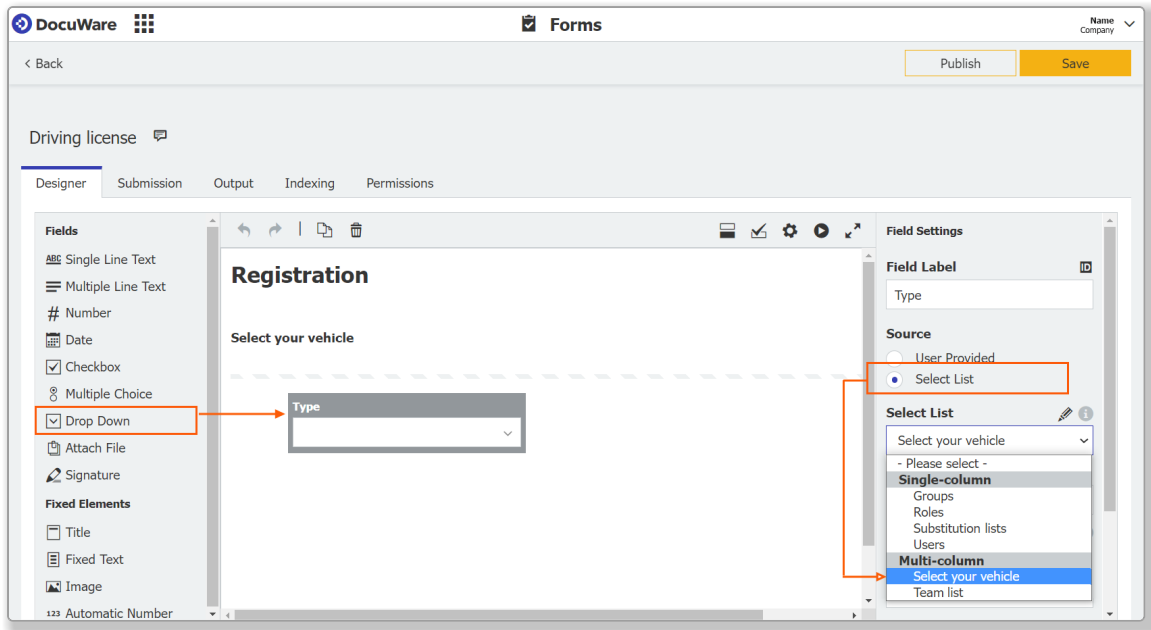
Benefits

- Easy to complete forms
- Error-free data entry because the entries in the form fields match
- Clearly arranged form even if there are lots of input options

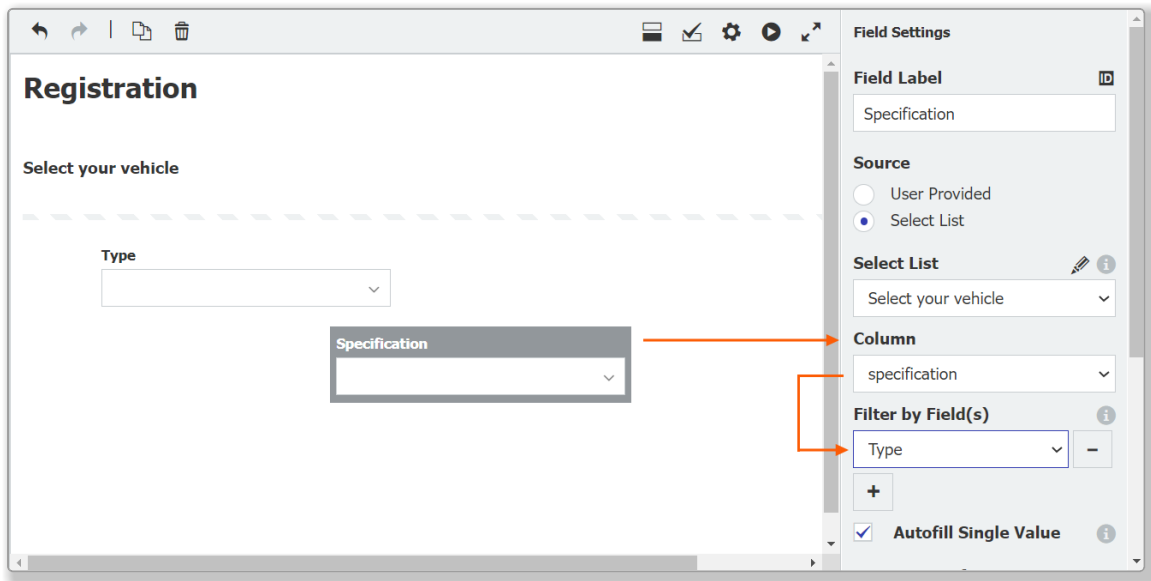
Here's how

Dependent filtering is based on multi-column selection lists, which are imported from or set up in the *DocuWare Configuration > Indexing assistance* area. For more information about multi-column select lists, please go to [DocuWare Knowledge Center](#)

In the *DocuWare Configuration > Forms > Designer* area, go to the settings of a drop-down field and first select the *Select List* option as the *Source*, then the multi-column list and the column you require. The values of this column are stored as input options for the first drop-down field; in the "Vehicle selection" example below, this is the *Type*. If required, the select list can be accessed directly from the Designer, for example, to make changes.



The second table column *Specification* assigned to the next drop-down field. In addition, assign the *Type* field as a filter. The other fields are configured in the same way. If a single value remains in a table column, the *Autofill Single Value* option will automatically insert it into the linked field.



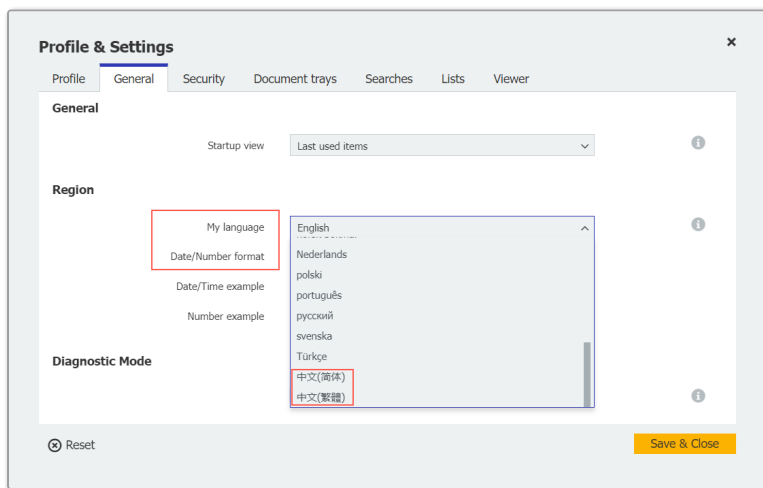
2.4 Full support for Chinese

Components: Web Client and more

There are a number of innovations for improved use of DocuWare in Asian languages. This is because supporting a language in document management and workflow automation extends way beyond just translating the user interface. In addition to Simplified Chinese, we now also offer Traditional Chinese.

The following components and functions are now available for Chinese, both Traditional and Simplified:

- Web Client
- Desktop Apps including Client Setup
- Configurations
- Workflow Designer
- DocuWare Administration
- Mobile
- Text recognition
- Fulltext search, see [Define fulltext language per file cabinet](#) (page 22)
- Intelligent Indexing, including date, time, and number format
- Big5 as encoding type for CSV exports, see [Encoding type for CSV files selectable](#) (page 8)



From the DocuWare main menu, open the Profile & Settings area to change language and number format. Both Chinese variants are available for selection.

The [overview of supported languages](#) shows in detail which DocuWare components are available in which languages.

2.5 XML invoice standard for Colombia

Component: Document processing (DocuWare Import)

In addition to the XML formats already supported for electronic invoices, DocuWare also imports and processes the standard prescribed by the Colombian tax and customs authority DIAN (Dirección de Impuestos y Aduanas Nacionales).

Application

You can use DocuWare Import to import invoices with the Colombian XML format into DocuWare so that their contents are read automatically.

Benefit

- Greater flexibility in receiving e-invoices

Here's how

If you receive an e-invoice in Colombian XML format together with an accompanying PDF, you can store the PDF separately in DocuWare and then link it or staple it to the XML invoice. Since it is two separate files, the PDF cannot be displayed in the viewer together with the XML invoice.

3 Workflow innovations

3.1 Task list: display functions as for the result list

Components: Workflow tasks in Web Client, Workflow Designer

When designing a task list, you can now select a result list to determine which functions are offered to the user in the DocuWare Client via the toolbar and context menu. You can also enable and disable the following functions for the task list:

- Mark tasks as read/unread
- Open workflow history



Application

The administrator of your system wants to prevent downloading documents with annotations. This should be reflected both in the result list and task list.



Benefits

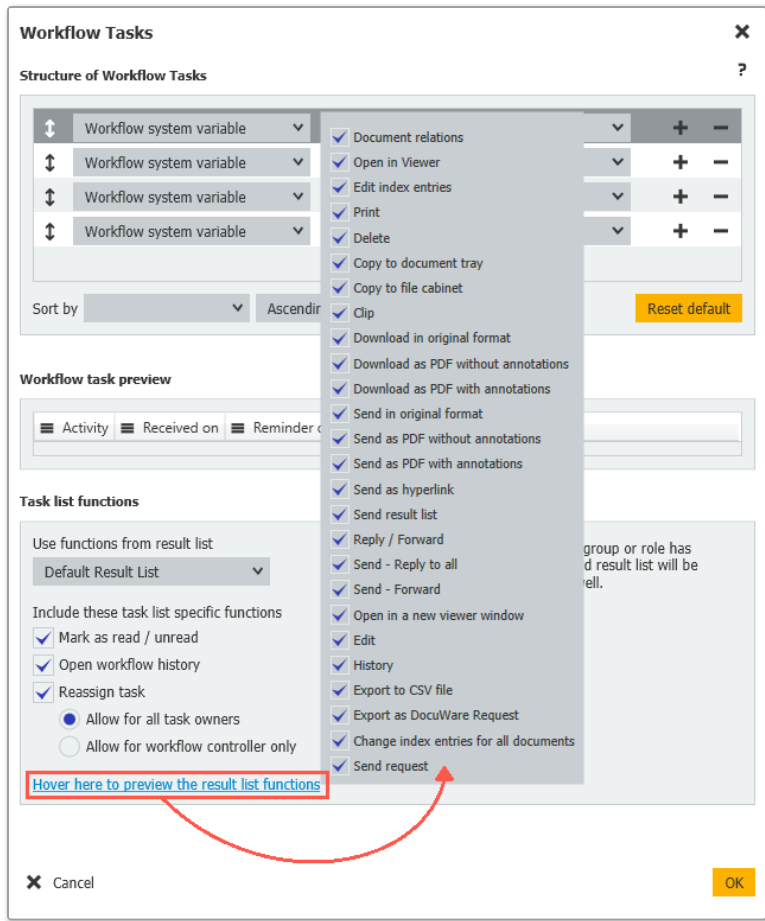
- Greater clarity
- Flexibility in completing tasks
- Consistent options for result list and task list



Here's how

The functions available to you in Workflow Designer for processing a task list essentially depend on the **result list settings** of the file cabinet. These settings are inherited by the task list. In order to control other functions for the task list, you must first enable them for the result list of the relevant file cabinet in DocuWare Configuration under *File cabinets > Dialogs > Result > Result list*.

In the **task list settings**, you can simply mouseover the link to see which features have been enabled for the result list. You can also select specific functions there for the task list and adjust them by workflow.



3.2 Indexing table data more flexibly

Component: Workflow Designer

There are two new options available to index table data automatically. These make it easier for you to handle data assignments for tables as a whole:

- **Copying the entire table content**
To reuse the table data of another document as index data for the current document, use the *Assign data* activity and then the *Table > All columns* target
- **Indexing specific columns of a table**
To transfer data automatically to defined columns of a table, also use the *Assign data* activity, but select: *Table > Single column*.

Application

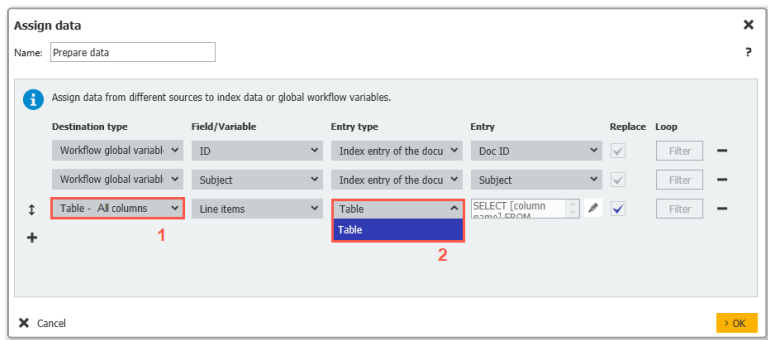
In accounting, you can write the same recurring billing data from archived documents to your new invoices. You can also calculate prices before and after tax.

 Benefits

- Quick and easy configuration
- Reduces manual input
- Reduces error rate

 Here's how

Copying the entire table content



In the *Assign data* activity, select *Table > All columns* (1) as the destination to define a destination table in the index data of the workflow document. The destination table is then filled with all of the contents (i.e. all of the rows) of the source table (2).

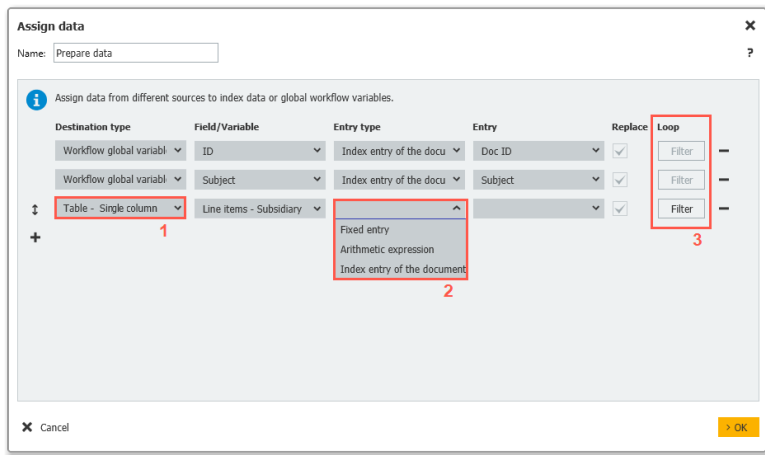
In a second dialog, you can map columns in the settings of the source table. The source document for the data can be in the same file cabinet or in a different file cabinet.

The option exists in addition to prefilling a table only in the user interface that is already available and which you define in the *Task* activity under *Decisions > Dialog*. Here, the data is not transferred to the index data and the database until the user confirms the task. Continue to use this option if you want the user to edit the data before it is written to the index data and database.

Where you best use which function:

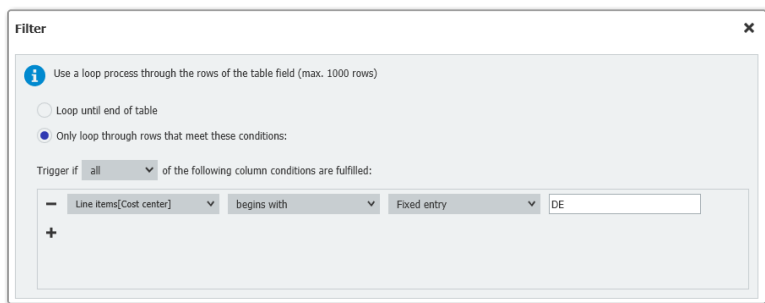
Prefill the table in the dialog	Copy the complete table content
Provide default values in the user interface	Write data to the database
User interaction required	Automated process
Activity <i>Task > Decisions > Dialog</i>	Activity <i>Assign data</i> or activity <i>Task > Decisions > Assign data</i>

Indexing specific columns of a table



In the *Assign data* activity, select *Table > Single column* as the destination (1). Then the sources to choose from are (2): *Fixed entry*, *Arithmetic expression*, or *Index entry of the document*. While the *Index entry of the document* source provides access to all regular fields, *Arithmetic expression* additionally provides access to other table field columns. Only data from the document in the workflow can be used as a source.

Under *Filter* (3), select whether you want to have the data transferred for all rows of the table field or only for those rows that match the selected criteria.



3.3 Workflow history displays processors directly

Component: Web Client

The workflow history now includes the *Processor* column so that you can immediately see who is or has carried out the relevant step without having to expand anything. If a task is open and assigned to multiple users, all users will be listed. As soon as one of them completes the task, only this user will be listed. The same applies if the task is assigned to multiple users via a role.



- Faster overview

4 What's new in configuration

4.1 Defining full-text language per file cabinet

Component: DocuWare Cloud > Configurations > File cabinets

So that the fulltext search always delivers optimal results—even for documents in different languages within a company—language support can now be defined separately for each file cabinet. There are two options to choose from: *East Asian languages* for Chinese, Japanese, and Korean, as well as *All other languages* including English, German, French, and Spanish, plus other language families such as Arabic or Cyrillic.



Application

- Companies in Hong Kong, for example, can use the fulltext even if the documents are partly in an Asian language and partly in another language, such as English.



Benefit

- More flexibility for international companies in document archiving and searching



How to configure it

When a new organization is created, the fulltext language is firstly defined on a company-wide basis. This setting is suggested by default when creating new file cabinets, but it can be changed. You can adapt the fulltext language for existing file cabinets under *File cabinets > General > Options > Configure fulltext search*.

The option to specify the language support for the fulltext per file cabinet is only available for DocuWare Cloud customers.

4.2 More security through dependency checking for file cabinets

Component: Configurations > File cabinets

For a file cabinet to be deleted, it cannot be being used by stamps, synchronization jobs, or other elements. This dependency check now includes workflows. The file cabinet can only be deleted when publication of all workflows associated with the file cabinet has been canceled and the workflows deleted.



Benefits

- Protection against accidental deletion of file cabinets
- No incorrect messages from irrelevant workflows

 Here's how

If a user attempts to remove a file cabinet with existing dependencies, a note will be displayed in the file cabinet area of the configuration. The deletion process is aborted. The dependency check is automatic.

4.3 Dynamically control permissions for user roles and groups

Components: Configurations > File cabinets, Document relations

The rule editor for file cabinets and document relations now includes the system functions *User group* and *User role*. They can be assigned to index fields of the *keyword* and *text* type. This checks whether the user belongs to a group or role entered in this index field. Only then can the user access the documents.



Application

In many organizations, the structure of DocuWare profiles and permissions reflects the corporate structure. As this example demonstrates: The cost centers 01-99 of a company are saved as roles in DocuWare User Administration. Each user assigned to a cost center should be able to access only the invoices of that particular cost center.

To make this possible, the relevant cost center is first stored in an index field of the *text* type when an invoice is stored. As an access control, it is now possible to create an individual index value profile for each cost center and to query the respective cost center in this profile. Using the example of cost center 01, the condition in the rule editor of the index value profile would look like this:

Index field *Cost center* equals *Cost center 01*

Now the *Cost center 01* user role would have to be assigned to this index value profile. With this approach, you would have to configure a total of 99 similarly structured index value profiles.

With the new system function, a single index value profile, to which all cost center user roles are assigned as users, is sufficient for access control. The associated rule in the index value profile is as follows:

Index field *Cost center* equals system function *User role*

So when you access a document, DocuWare checks whether there is a value in the *Cost center* index field that corresponds to the name of a user role of the logged-in user. This means that if, for example, *Cost center 02* is in the index field and if the accessing user is also assigned to the *Cost center 02* user role, this user will have access to the document. Index values and user roles are interlocked.

Organizational multiple assignments can also be mapped with the new system functions. In the example above, all cost centers with intended access to a document could simply be stored in a "Cost centers" keyword field.

 Benefit

- Easier configuration of permissions for large companies

 Here's how

The *User role* and *User group* system functions are available in the rule editor for index value profiles, folder structures, and lists (*Configurations > File cabinets*), and for document relations. Assignment is done using the following operators:

- Keyword:
Contains—at least one keyword matches one of the user roles/groups
- Text field:
Equals—text field corresponds to one of the user roles/groups
Is not equal—text field does not corresponds to any of the user roles/groups

4.4 User login/logout details for audit reports

Component: [Configurations > Audit reports](#)

Audit reports of user logins and logouts now also list the relevant DocuWare application, for example, Web Client or DocuWare Desktop, as well as access source, such as via mobile app or the platform.

 Benefits

- Better traceability of who was logged into which applications and when
- More details included in audit report CSV file, see [Encoding type for CSV files selectable](#) (page 8)

 Here's how

In the *Configuration* area, open *Audit reports* and click the organization name in the *Organization* area. Move the mouse to the note symbol at the end of an entry. The relevant application is listed there. The information is also included in the audit report CSV file.

4.5 Better performance with modified scheduling

Components: [DocuWare Cloud > Configurations > Autoindex, Email notifications](#)

Without impacting functionality, for better overall performance, the duration of the shortest interval for the automatic execution of two configuration jobs is increased:

- The automatic interval for Autoindex jobs is now at least 60 minutes. To trigger automatic indexing without delay, please use the *File cabinet event* trigger option.
- Email notifications are sent approximately ten minutes after the message condition is triggered. This replaces the option for direct sending.

Existing configuration jobs with outdated time control remain active and are executed accordingly. Only if a setting in the relevant configuration is changed must the execution be rescheduled.

This change only affects DocuWare Cloud customers.

4.6 Using email attribute for user synchronization

Component: User Synchronization Version 2

Up until now, synchronizing DocuWare users with Microsoft Azure Active Director was done exclusively via the User Principal Name (UPN). As an alternative, it's now possible to select the email attribute in Azure Active Directory. In the desktop app *User Synchronization Version 2*, a corresponding option is available in the *Azure AD user definition > Users* tab. Synchronization offers more flexibility, especially for users with emails from different domains.

5 Technical information

5.1 Modified system requirements

Compared to DocuWare version 7.5, the system requirements have changed as follows:

- Browser: Internet Explorer 11 is no longer supported.
- Operating systems: Windows 11 and Windows Server 2022 supported for server and client machines
- .NET 6 as a condition for Windows Explorer Client (installed via Client Setup)

Additional changes for on-premises systems:

- MySQL 8 is supported as a database (with legacy basic authentication and collation utf8mb3_unicode_ci)
- Communication encryption: HTTPS is also required for on-premises installation, HTTP is no longer sufficient

As usual, you can find the complete [system requirements](#) in the Knowledge Center.

5.2 Update to Version 7.6

DocuWare Cloud

All customers will be informed in good time by email when the update will be carried out.

DocuWare as an on-premises system

To update, you need at least version 7.0 of DocuWare. To implement the update, please contact your Authorized DocuWare Partner.

Please also check to what extent [technical changes with DocuWare Version 7.6](#) are relevant to your system. Bear in mind that from this version onward secure HTTPS connections are required for any communication from clients with DocuWare systems.