What's new in DocuWare version 7.9

Features, use cases and benefits for users

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September 2023

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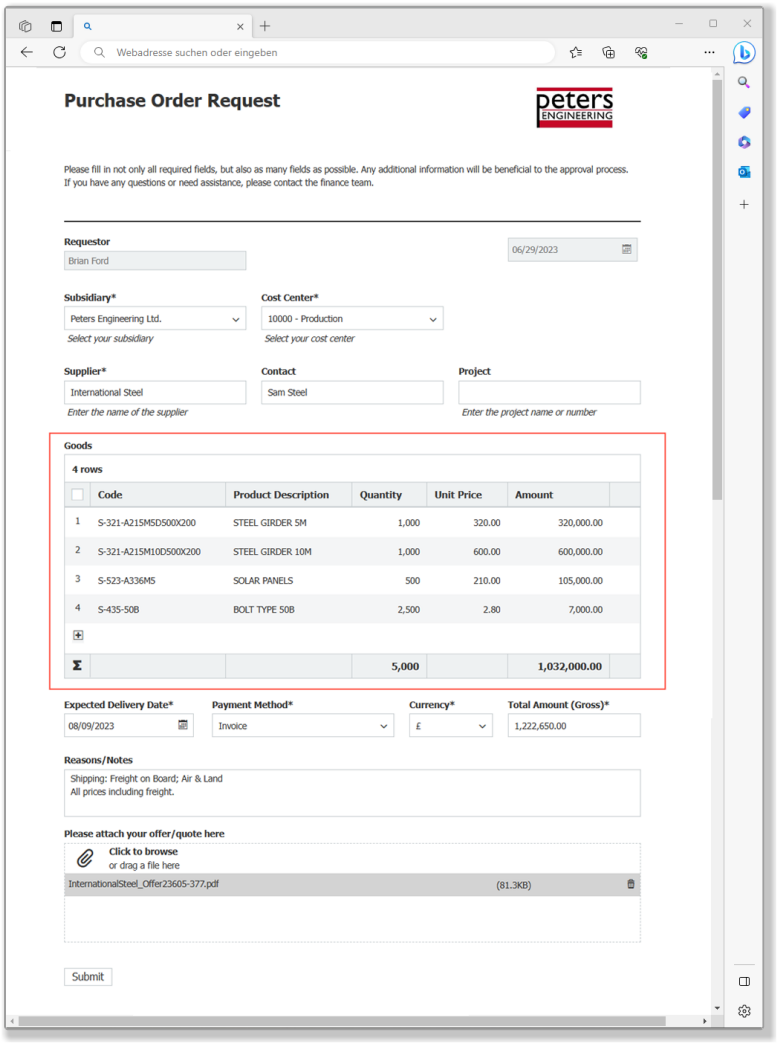
1 Focus theme: Improved purchase to pay process

This latest release offers significant improvements for the purchasing process with DocuWare. Optimized is the matching of table data from different sources, as well as the extended cross-check of invoice items and the new functions for forms and XML invoices bring customers many advantages.

1.1 Tables in DocuWare forms

Component: DocuWare Forms

You can now insert tables in DocuWare web forms. This simplifies the structured entry of data and lays the foundation for automated processing.



Purchase order request web form with a table for entering the desired items

Applications

- Purchase order form: Table for entering requested items (first step in the purchase-to-pay process)
- Travel expense form: Table to record expenses during a business trip, such as restaurant meals and taxi rides.
- Order form: Table for the items the customer wants to order

Benefits

- Form users can easily enter data in a structured format
- Structured data can be easily processed in automated workflows

Here's how

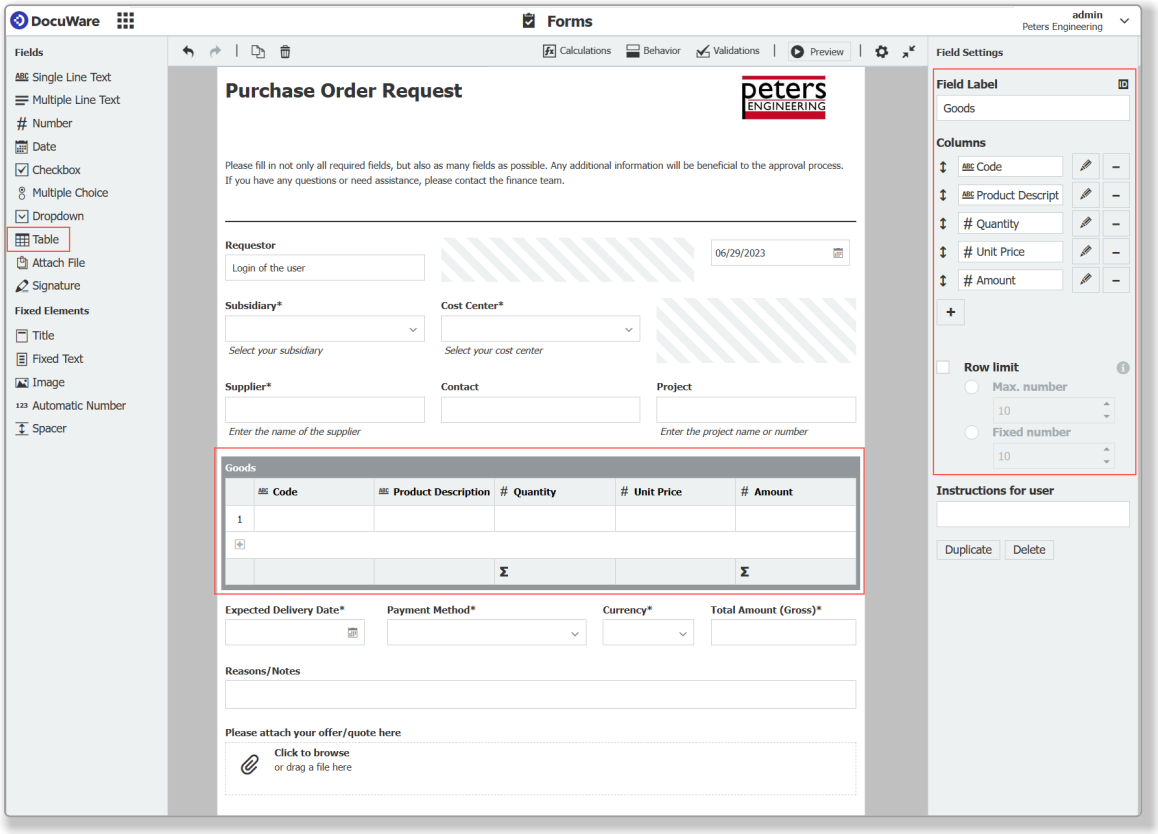


Table in Forms Designer

You insert tables just like any other field by dragging and dropping them from the Form Designer toolbar. You can have multiple tables in a form, each with a maximum of 12 columns. Single line text, numeric, date, and drop-down are supported as column formats. The number of rows the user can fill in can be limited to a maximum or set to a fixed value. The absolute maximum is 200 rows per table.
Table fields are not currently supported in merge forms. In the Knowledge Center you can find detailed information about tables in forms.

1.2 Import XML invoice data into index tables

Component: Import

When importing an XML invoice, the listed items can now be captured into index tables. This helps processing e-invoices within your purchase to pay workflow.

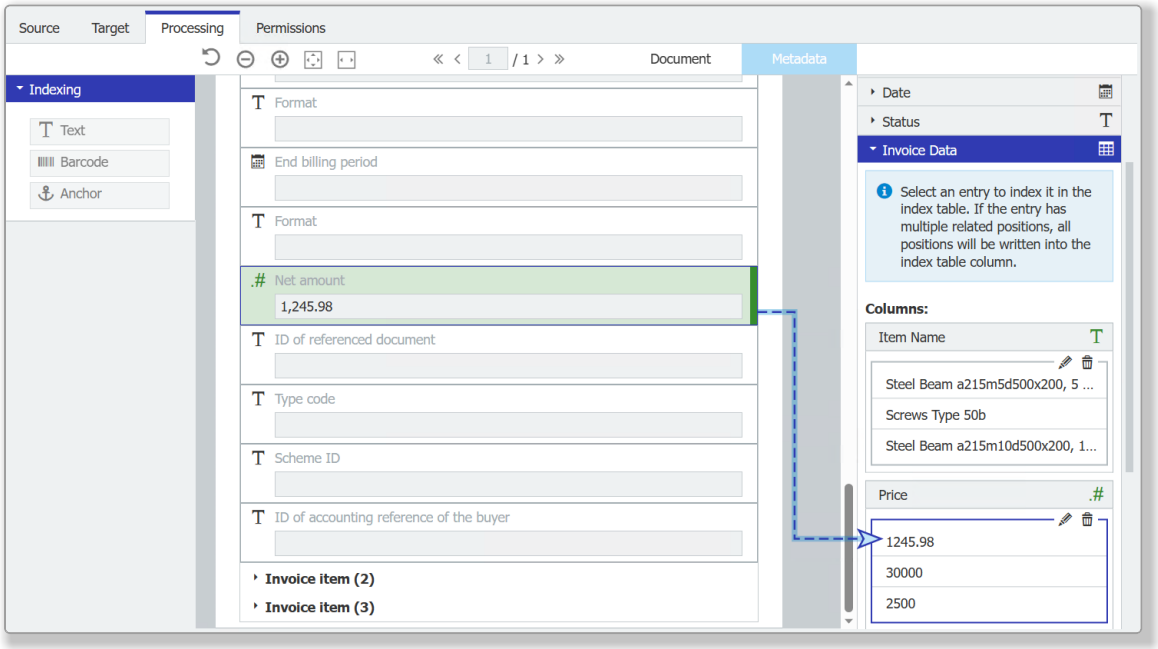
Application

- You regularly import invoices into DocuWare and want them to be processed in the workflow with the item data written in the index tables.

Benefits

- All item data from e-invoices are automatically captured
- Automatic processing in workflow
- No manual work – eliminate data entry errors

Here's how



Your sample XML invoice has at least two items. Just connect one of them to a row of the index table and all other invoice items will be automatically entered in the table. Your XML invoices can follow any format supported by DocuWare (e.g. ZUGFeRD, XRechnung, FatturaPA or FacturX).

1.3 Workflow: Advanced matching of table data

Component: Workflow Designer

You can now match tables from different table sources based on arithmetic expressions. Using this powerful data adaptation tool, you can make your line-item matching even more flexible and robust: It allows you to eliminate the most common sources of errors or additional effort when digitizing invoices or other documents.

Applications

- **Match by similarity and avoid errors due to scanning defects**
  You have a purchase order with an item number ending with "M5". However, due to an OCR mistake the PDF of the scanned invoice shows "MS" instead. Nevertheless, the invoice is processed correctly by DocuWare because you have set up the line-item matching based on similarity using the fuzzy string comparison function.

  Compare two strings and return their similarity, for example:
  - Peter P**e**ters**o**n _~ Peter P**i**ters**e**n = 93% similarity
  - S523-A336M**S** ~ S523-A336M**5** = 95% similarity
- **Match with regular expressions and adapt item IDs and strings to your requirements**
  The item ID of the purchase order has numbers and characters. In contrast the item ID on the invoice has only numbers. To match only the numbers, you remove the characters of the ID using regular expressions.

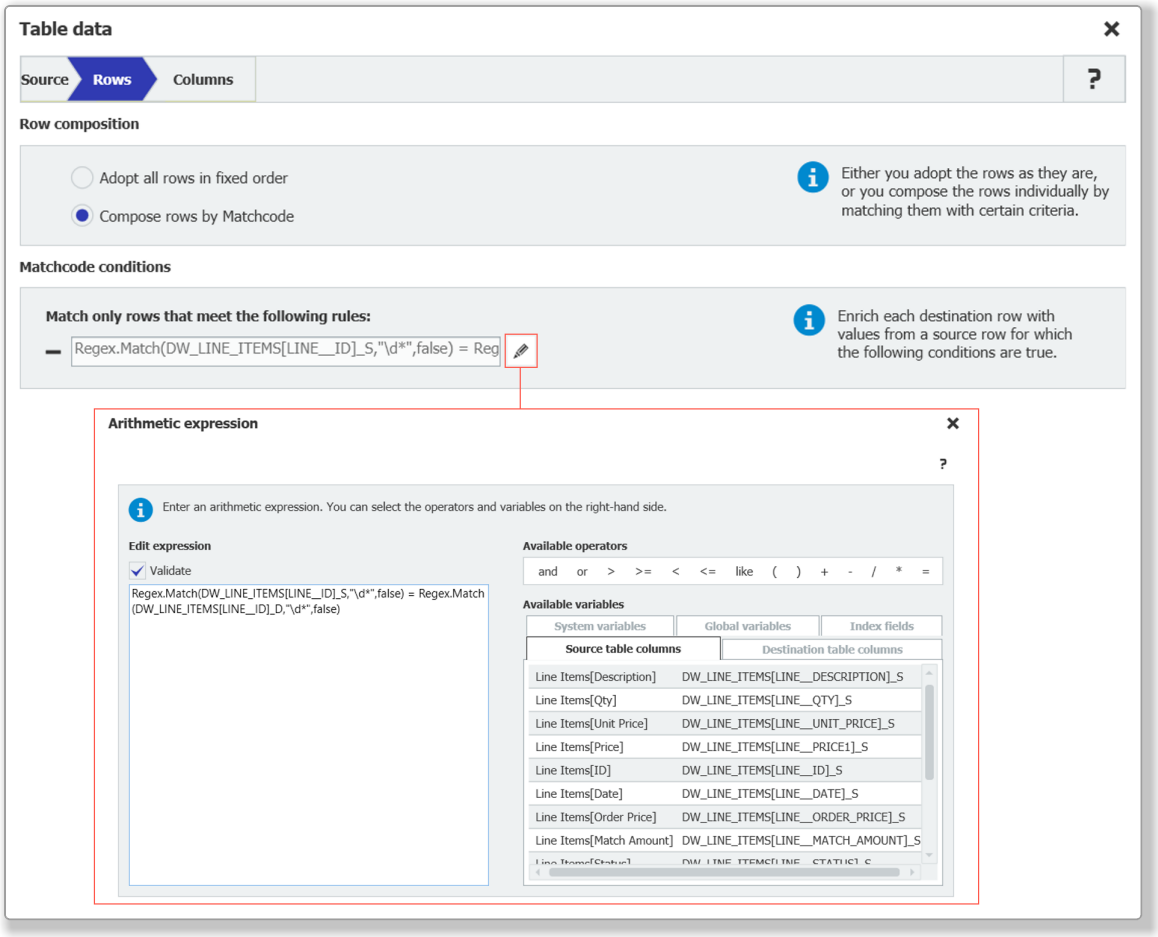
  Change a string according to a pattern, for example:
  - Remove all digits from an input string based on the pattern *\d*: Something123Anything => SomethingAnything
  - Split an input string based on the pattern *\d+*: Something123Anything => Something, Anything
  - Check whether a string matches the pattern *[A-Z0-9]\d{3}-\d{3}*: A123-456 => true

Plus, using LINQ methods (page 17), you can now also more easily check whether there are discrepancies in the quantity or price in the status column, for example.

Benefits

- Accelerates the process
- Allows deviations and more tolerance
- Makes matching more robust and flexible

Here's how



Go to *Table data* > *Rows* > *Matchcode conditions* and define the matching rules using arithmetic expressions. The result must be "true" or "false" (Boolean).
For the arithmetic expressions, see the Workflow Expression Parser documentation. A configuration example for a three-way match workflow can be found here.

1.4 Assign data from file cabinets to index tables

Component: Workflow Designer

For assigning data to index tables, you can now select *File cabin*et as a source.

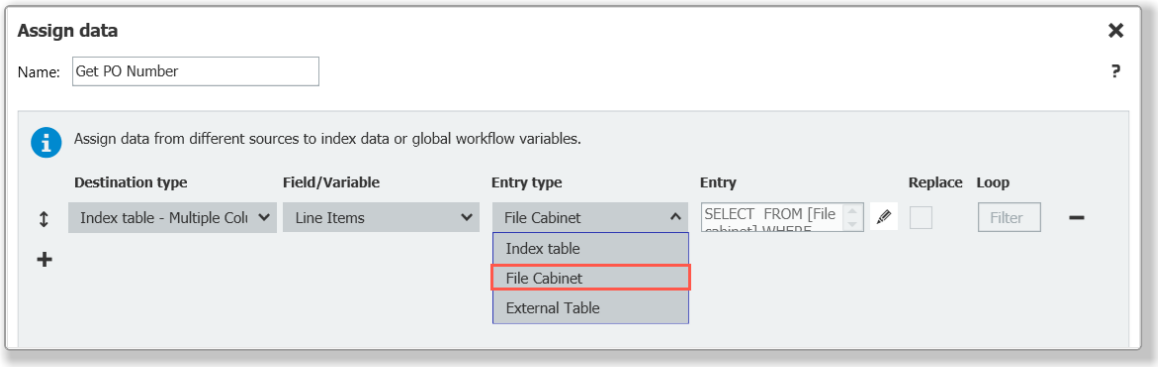
Application

- Match the line items of an index table with existing index entries from a file cabinet and, if necessary, take over these values into the index table of the current document.

Benefits

- Assign data faster
- More flexibility

Here's how



1.5 Match data from more documents and merge them into one index table

Component: Workflow Designer

When assigning data to the index table of a document, you can now obtain data from up to 20 different documents of the same type. In addition, up to 10 values can be matched per data assignment and you can sum up numerical values in the decimal column.

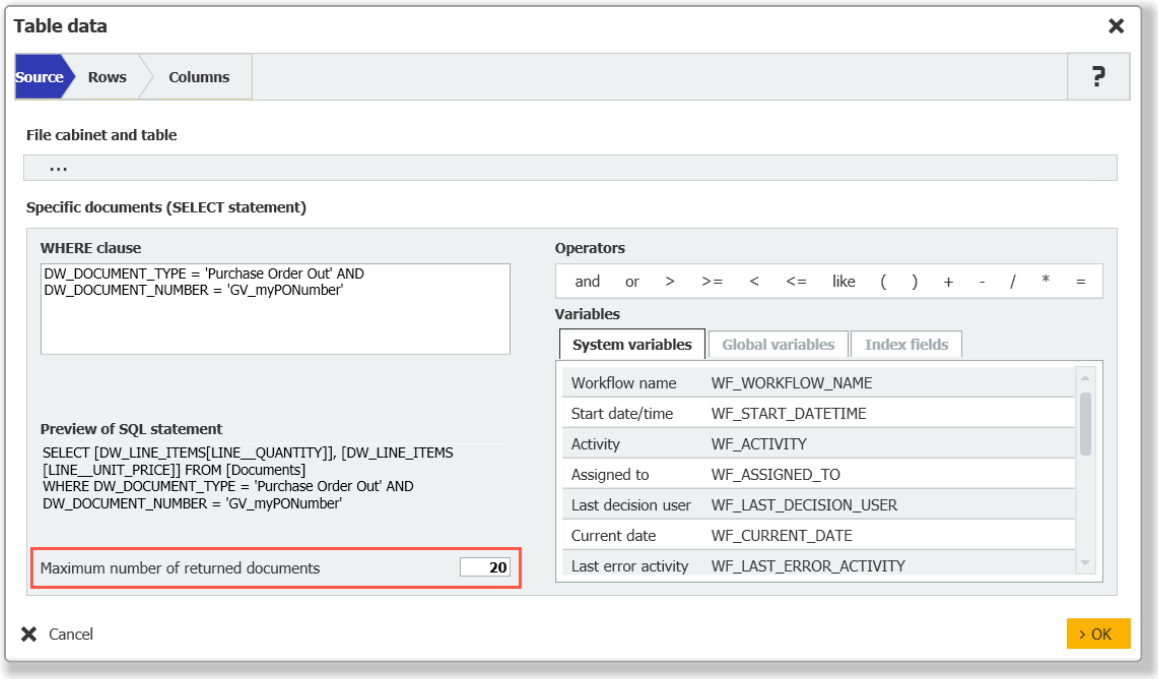
Applications

- There are multiple purchase orders whose items are combined into one invoice. You retrieve the data from all purchase orders to perform a 2-/3-way match with the invoice.
- You want to determine the quantity of an item that was not delivered all at once and therefore exists on multiple delivery bills. You assign the totaled quantity and perform a 2-/3-way match.

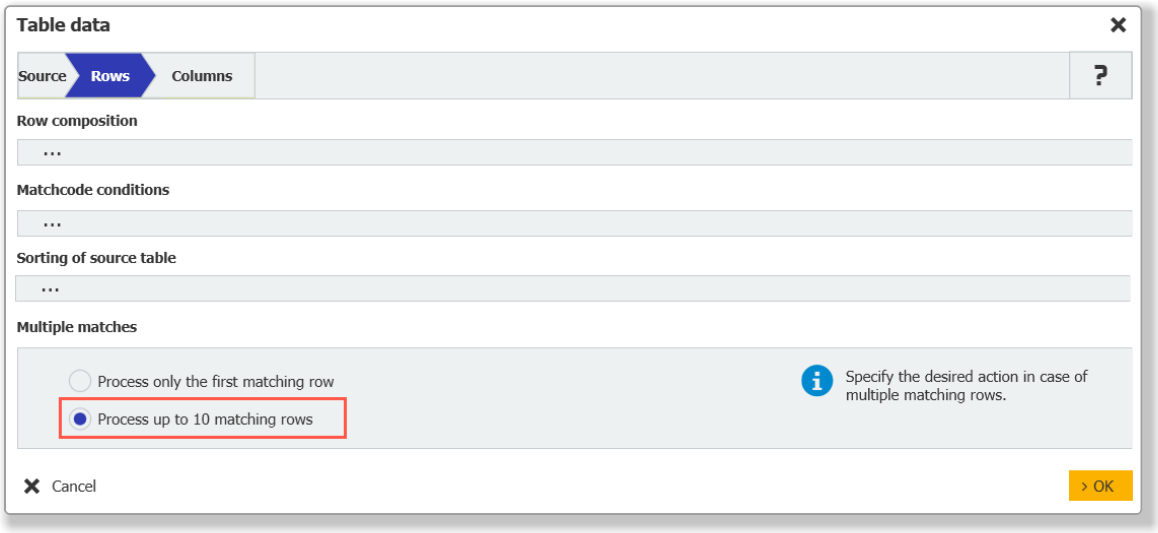
Benefits

- Automate complex purchase-to-pay scenario
- Save time

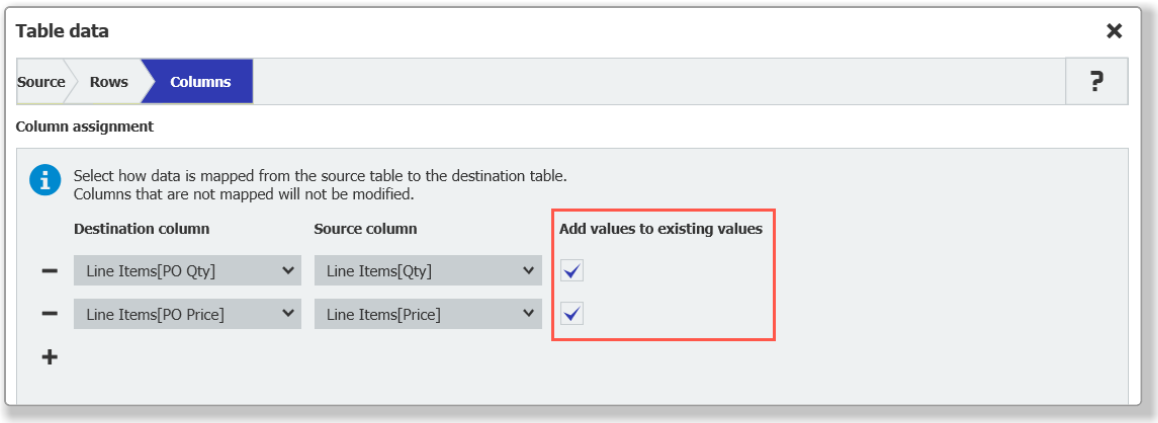
Here's how



On the *Source* tab, you specify the number of documents from whose metadata you retrieve data.



Under *Rows* in the new *Multiple matches* section, enable *Process up to 10 matching rows*.



On the *Columns* tab, activate the option to add more values to already existing ones.

1.6 Platform REST API for web services

Component: Workflow Designer

In the Web Services activity, you can connect to the DocuWare Platform REST API now in addition to external SOAP and REST web services. Choose from predefined endpoints for operations on file cabinets, documents, and users.
Moreover, you no longer need to worry about authentication, as this is done automatically by DocuWare.

Applications

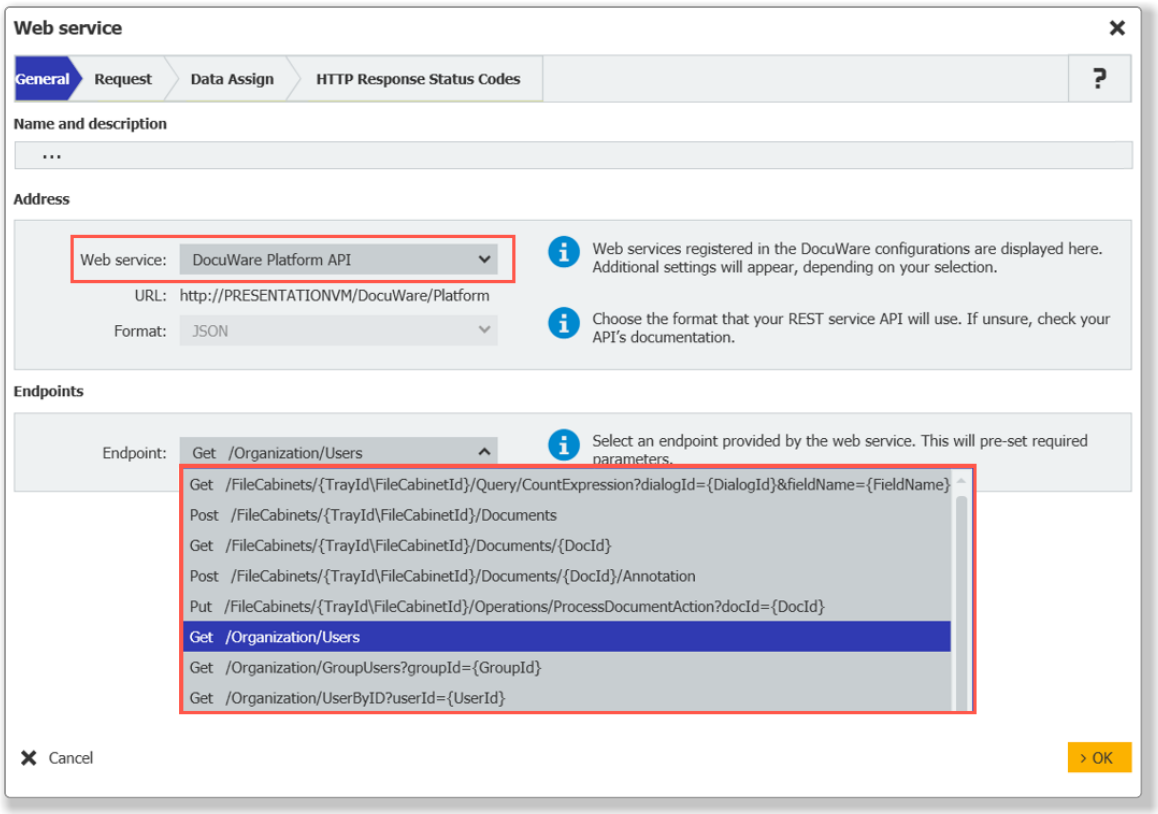
- After an incoming invoice has been processed in the accounting software, you want to automatically set a "Paid" stamp on the document in DocuWare.
- You dynamically grant access rights to members of the same department as the requestor after his or her order has been approved.
- You want to query the absence status of a particular user to decide what to do next in the workflow.

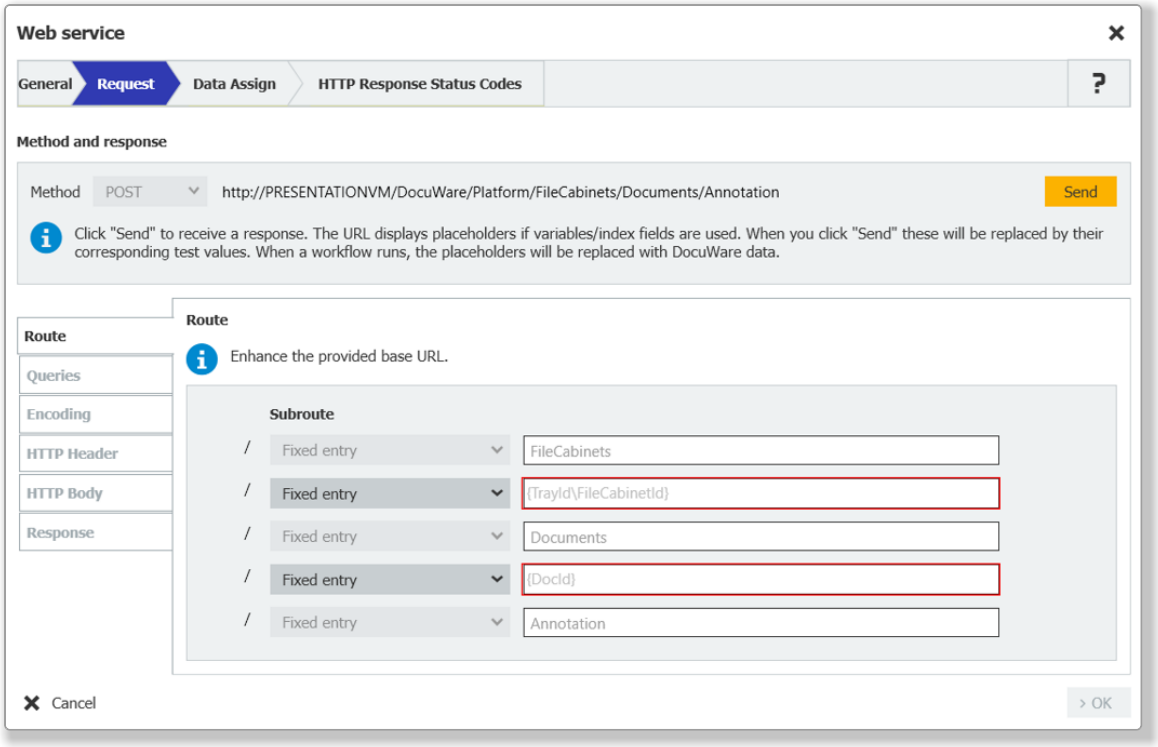
Benefit

- Further automation of sub-processes
- Set up tasks faster with more options

Here's how

When using the predefined endpoints, you see a simplified configuration: the fields you still need to fill in are highlighted, such as the file cabinet ID and the document ID.


Web service
General
Request
Data Assign
HTTP Response Status Codes
Name and description
...
Address
Web service:
DocuWare Platform API
URL:
http://PRESENTATIONVM/DocuWare/Platform
Format:
JSON
Web services registered in the DocuWare configurations are displayed here. Additional settings will appear, depending on your selection.
Choose the format that your REST service API will use. If unsure, check your API's documentation.
Endpoints
Endpoint:
Get /Organization/Users
Select an endpoint provided by the web service. This will pre-set required parameters.
Get /FileCabinets/{TrayId\FileCabinetId}/Query/CountExpression?dialogId={DialogId}&fieldName={FieldName}
Post /FileCabinets/{TrayId\FileCabinetId}/Documents
Get /FileCabinets/{TrayId\FileCabinetId}/Documents/{DocId}
Post /FileCabinets/{TrayId\FileCabinetId}/Documents/{DocId}/Annotation
Put /FileCabinets/{TrayId\FileCabinetId}/Operations/ProcessDocumentAction?docId={DocId}
Get /Organization/Users
Get /Organization/GroupUsers?groupId={GroupId}
Get /Organization/UserByID?userId={UserId}
Cancel
OK


Web service
General
Request
Data Assign
HTTP Response Status Codes
Method and response
Method
POST
http://PRESENTATIONVM/DocuWare/Platform/FileCabinets/Documents/Annotation
Send
Click "Send" to receive a response. The URL displays placeholders if variables/index fields are used. When you click "Send" these will be replaced by their corresponding test values. When a workflow runs, the placeholders will be replaced with DocuWare data.
Route
Queries
Encoding
HTTP Header
HTTP Body
Response
Route
Enhance the provided base URL.
Subroute
/ Fixed entry FileCabinets
/ Fixed entry {TrayId\FileCabinetId}
/ Fixed entry Documents
/ Fixed entry {DocId}
/ Fixed entry Annotation
Cancel
OK

1.7 Forms: Behavior of hidden fields

Component: DocuWare Forms

When using web forms in combination with merge forms, there is a new feature regarding hidden fields: You can now specify whether content from fields that are hidden in the web form should be transferred to the merge form. Until now, such values were always transferred.

Application

Order process: By entering data in the web form, a completed order form can be generated.
An example scenario with configuration instructions is described in detail in the Knowledge Center.

Benefits

- Consistent presentation and use of input data
- Faster processes

Here's how

The option “Show values from hidden fields on PDF” is on the “Output” tab of the Merge Form Designer. It is unchecked by default for new forms. For existing forms, it is checked by default so that the behavior is not changed by the update.

The function was added retroactively in DocuWare version 7.8 and is already available for all DocuWare Cloud customers. For on-premises, it is part of all versions from 7.8.0.12972 (May 25, 2023) on.

2 For day-to-day work with DocuWare

2.1 Filter in trash bin

Component: Web Client

Documents in the trash bin can now be filtered by all available columns in the listing.

Applications

- Use the filter option to reduce the documents in the trash bin to a smaller subset for further processing, for example to restore or permanently delete.
- If there are many documents in the trash bin, use filtering to find a specific document more easily.

Benefits

- Process a subset of documents in the trash bin at once
- Access specific documents in the trash bin quicker and easier

Here's how

Filtering works the same way as in other areas of the web client, such as results lists.
If a filter is applied, "restore all" and "delete all" operations in the trash bin work on the filtered subset of documents.

2.2 More convenience and speed for requests

Component: Web Client, Workflow Manager

The handling of requests has been made easier and faster:

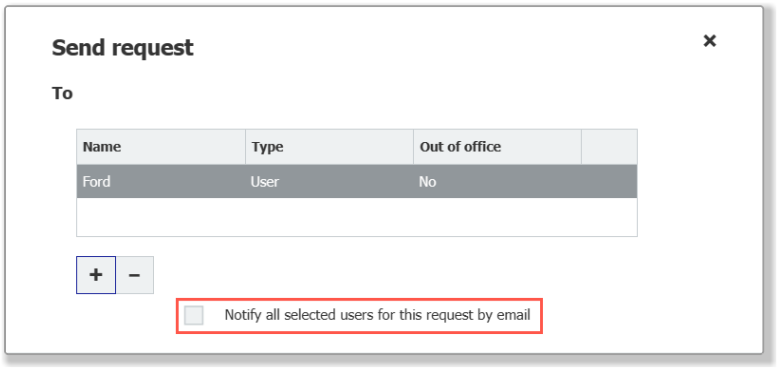
- In the *Tasks* submenu, you will find your *Sent requests* under *Monitor tasks* now.
- Multiple received requests can be processed at once and multiple sent requests can be stopped at once.
- As in workflows, decisions for received requests can now also be made by selecting and adding a stamp. To make the stamp appear in the viewer, for the request, you enable the option *Allow that decision can be taken by stamp* (formerly "Automatically stamp document with decision"). Furthermore, you can specify the color of the decision stamp in send request.
- The context menu options are now the same as for the default result list of the appropriate file cabinet. If a function is set to hidden for the result list, it is also hidden for the *Sent* or *Received requests*. When selecting multiple requests, *Print*, *Download*, and *Share by email* are not available.

- Under *Sent request*, the overview was extended by two new columns:
  - User: Lists the user(s) to whom the request is assigned.
  - Decision: Displays the decision the user has taken.
- In the *Send request* dialog, you can disable notifying users by email. Furthermore, the last settings are now always saved, and you can just adapt your last text, for example.

Benefits

- Better overview
- Less steps when having the same type of requests

Here's how



Email notifications can be easily deselected.

3 Workflow management

3.1 Task list: Get and send link or export list to CSV

Components: Workflow Manager, Web Client

Like with lists and result lists, you can get the link for a task list, send the link and export the task list as CSV file.

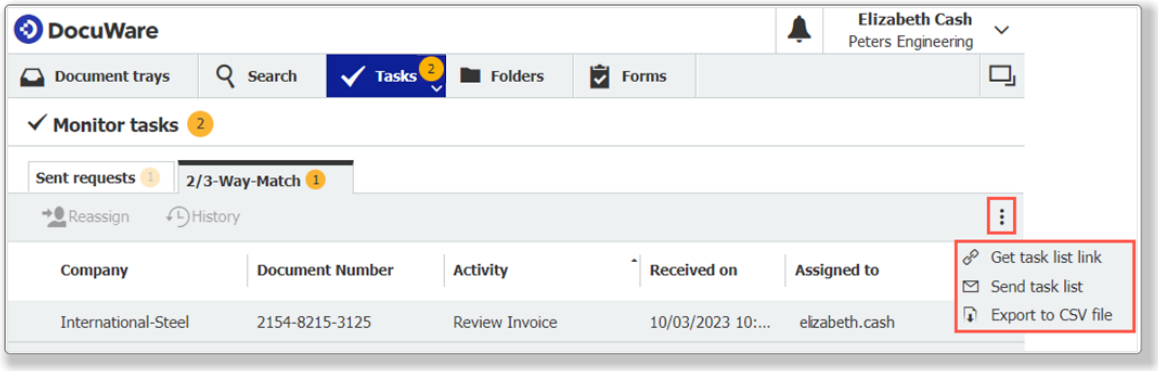
Application

- As a workflow controller, you may want to know how many tasks each member of your team is currently working on.

Benefit

- Better overview

Here's how



In Web Client, go to *Tasks* > *My tasks* or *Monitor tasks* and select from the additional options for workflow lists.

3.2 OpenAPI specification for REST web requests

Component: Workflow Designer

OpenAPI is a standard way to describe a REST API interface. This description contains all available endpoints and information about how to use the endpoints accordingly. API specifications are usually written in YAML or JSON, which makes the specification easy to share and use.
If you want to address an external REST web service in the workflow and there is a description or specification file for it, you can now import and use it in the workflow. Thus you can simply select the defined endpoints for the external REST webservice.

Benefit

- Easy and fast endpoint definition
- Reducing input errors

Here's how

When configuring the endpoint on the *General* tab, you can import an OpenAPI specification.

3.3 Using regular expressions

Component: Workflow Designer

You can now use several regular expression functions in arithmetic expressions. These are especially helpful for manipulating strings by certain patterns. For application examples and benefits, see Advanced matching of table data (page 7). For the arithmetic expressions, see the Workflow Expression Parser documentation.

3.4 LINQ methods eliminate the need for external validation

Component: Workflow Designer

You can also use LINQ methods now to check whether a certain value occurs in an index table column.

Application

- An invoice match may only be considered complete when all values are displayed as okay in the status column and there are no discrepancies, for example, in quantity or amount.

Benefits

- Set up validation more conveniently and quickly
- No external validation service needed anymore

4 Configuration and settings

4.1 More flexibility for data export

Component: Data Export

When you configure exporting the column headers on the *Custom content* tab, you have 3 options now for handling the column labels: *Don't include column labels*, *Include column labels for every document* (default) and *Include column labels only once per file*. The overview will reflect which option is selected.

In addition, all configurations are now displayed on one page, so you can scroll through them more easily.

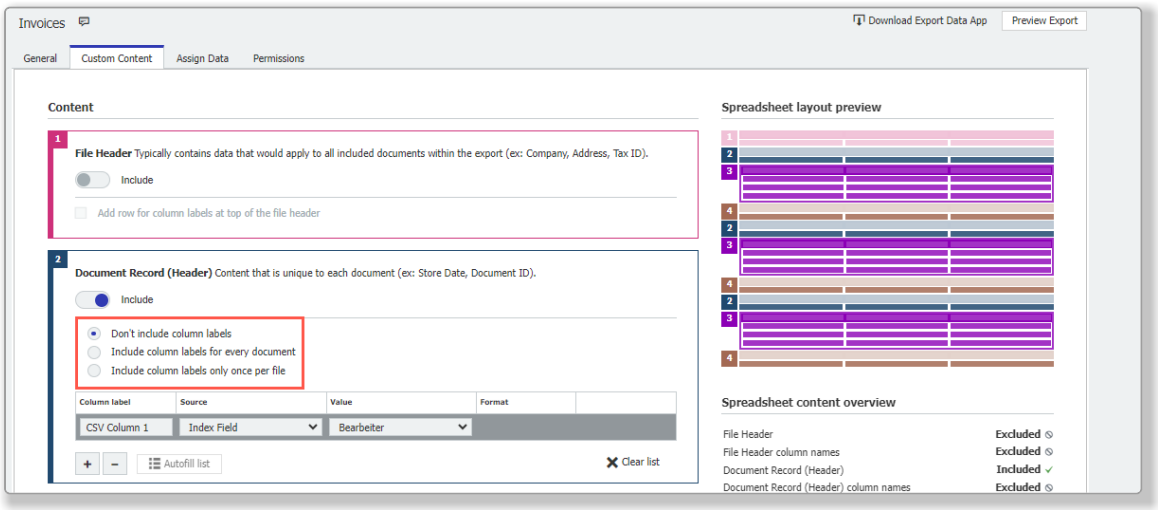
Application

- When you export data from DocuWare, your ERP needs a simple CSV file with only a column header on top of the file.

Benefit

- More convenience for easier data transfer

Here's how



4.2 Optimized Highlight Search

Component: Smart Connect

You can improve your Highlight Search results by using the operators *contains*, *equals*, *begins with*, *ends with* in text fields.

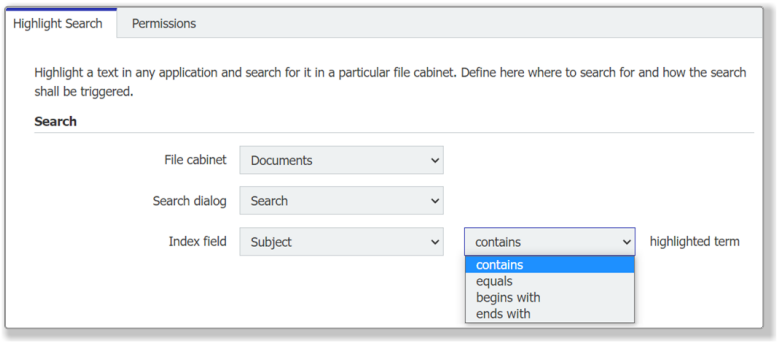
Application

- Your company uses multiple codes for different types of documents. To find all documents starting with a certain code you select *begins with*.

Benefits

- More search options
- Better performance

Here's how



Refine your configuration with the new operators. For fulltext, date, and numeric fields it always remains an "equals" search.

4.3 Split documents with one or all conditions

Components: Document Processing, Barcode & Forms

For splitting a document with multiple readout areas, you can decide whether ALL conditions or ANY condition must be met for execution. Previously, all conditions had to apply. Now you can define multiple conditions where only one has to be fulfilled to split a document.

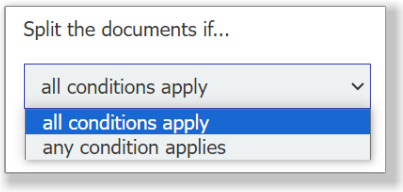
Application

- Split a document if a certain area contains either the word "invoice" or "Rechnung" or "fattura".

Benefit

- One configuration needed to fulfill multiple use cases
- More flexibility when there is uncertainty about the content in documents

Here's how



In the splitting area of Document Processing, you can define multiple conditions by drawing multiple readout areas. On the right, select *Split if any condition applies* then.

4.4 Adapt network ID

Component: DocuWare as on-premises system

DocuWare users of on-premises systems can independently change their network ID in the Web Client.

Application

- Continued use of single sign-on after changing user or domain name

Here's how

To use the option, navigate in DocuWare Client in the main menu > *Profile & Settings* > *My Profile* > *More Options*.
It is available for all DocuWare users, even without administrator rights, but not for users with the security level "High".
The format for the input is: "domain\user".

5 Technical information

5.1 System requirements and limitations

Compared to DocuWare version 7.8, there are the following changes:

System Requirements

Only for DocuWare Cloud

- .NET 6 as a prerequisite for the **Local Data Connector**.
  DocuWare Client Setup automatically installs the version when you install or update the Local Data Connector.

Only for on-premises

- For new installations, **Oracle databases** are no longer supported.
  For existing systems, version 7.9 is the last to support Oracle databases. For customers with Oracle database there will be a migration tool to switch to Microsoft SQL Server.

Limitations

Only for DocuWare Cloud

- The timespan for which **audit records** can be retrieved has been set to a maximum of 93 days. The period itself can go back several years, for example from January 1, 2021 to March 31, 2021. The change was done to improve the handling of large amount of data.
- The execution of **scheduled Autoindex jobs** will be delayed up to 5 minutes to avoid peaks and for better load balancing. Within an organization, the delay is the same for all Autoindex jobs to ensure that dependencies are not affected.

As usual, you can find the complete system requirements in the Knowledge Center.

5.2 Further Documents for Version 7.9

DocuWare Functions Overview

The Functions Overview lists all DocuWare functions and its add-on modules, including availability in DocuWare Cloud and on-premises in the various server editions. For client functions, their availability is also listed in the Web Client and the Windows Explorer Client.

Important changes

Before updating to Version 7.9, please check the extent to which the changes with this version are relevant to your system.

5.3 Update to Version 7.9

DocuWare Cloud

All customers will be informed in a timely manner by email when the update will be carried out.

DocuWare as an on-premises system

To update, your current DocuWare system must be at a minimum version 7.4. To implement the update, please contact your Authorized DocuWare Partner.

Please also check to what extent technical changes with DocuWare Version 7.9 are relevant to your system.