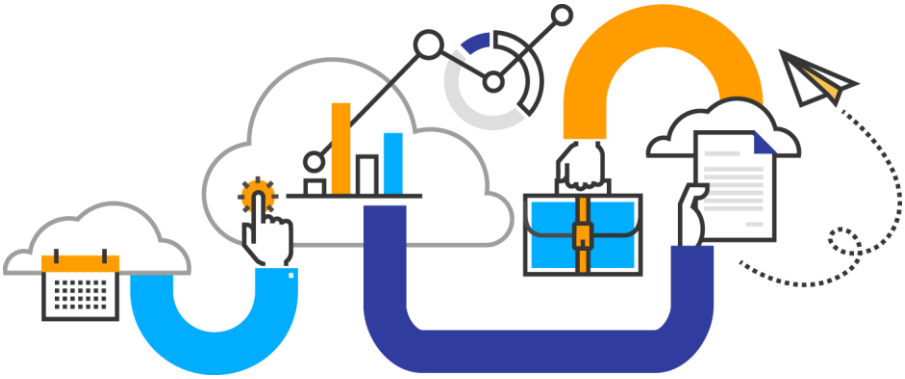
What's New in DocuWare Version 7.1



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DocuWare

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DocuWare Version 7.1

The possibilities associated with workflow automation are the major advantage of digitization and digital document management. With version 7.1, DocuWare supports even more application scenarios in this area as well as making the editing of workflow tasks simpler, clearer, and faster.

In addition, this version includes lots of innovations for improved customer experience of DocuWare. This is a constant driver for us because we want your experience of DocuWare to be as enjoyable and intuitive as possible.

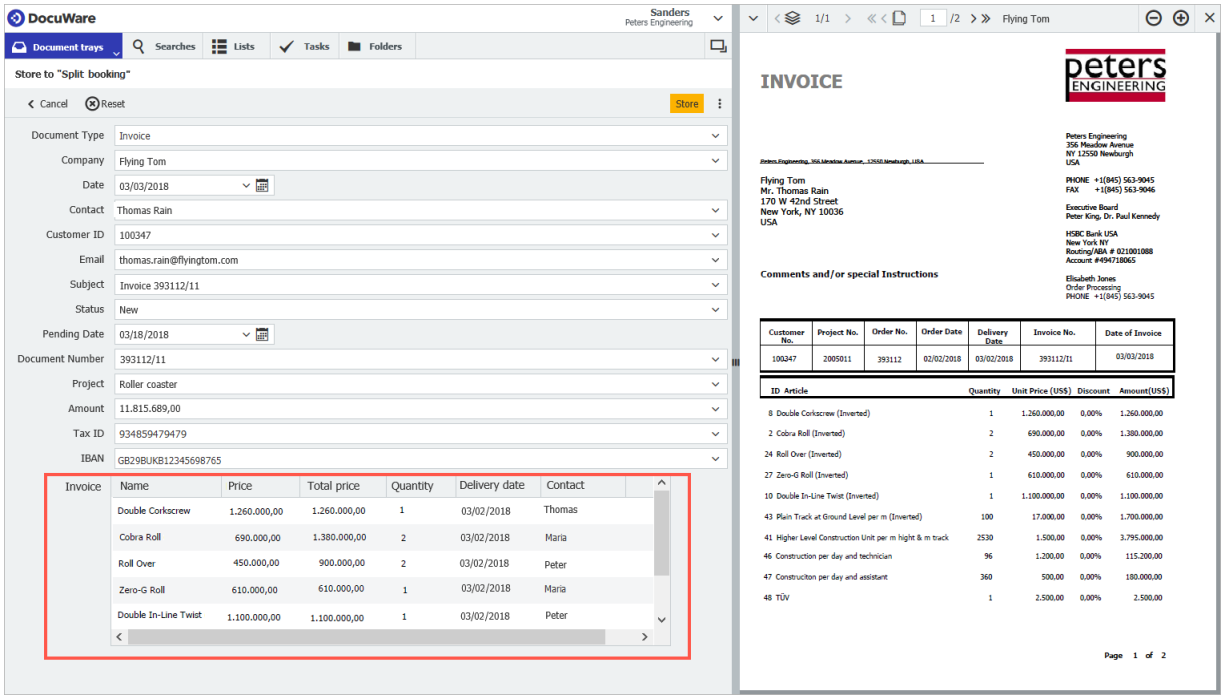
1 Automatic Processing Invoice Items

Automated invoice processing, from document capture and data entry to the approval process and legal hold, is one of DocuWare's strengths and a priority application for many customers. What previously referred to the whole invoice now refers to individual invoice items. Split posting processes, in other words allocating invoice items to different cost centers, including distributed approvals, can be easily implemented.

1.1 Automatic Line Item Recognition

Component: Intelligent Indexing

Invoice processing starts with entering both the document itself and the document data for automatic invoice processing. Intelligent Indexing eliminates the need for manual data entry. What's new: After a short learning phase, the AI of Intelligent Indexing automatically recognizes individual invoice items and transfers them to DocuWare as metadata. The new field type *Table* (on page 24) is used for this.



Application

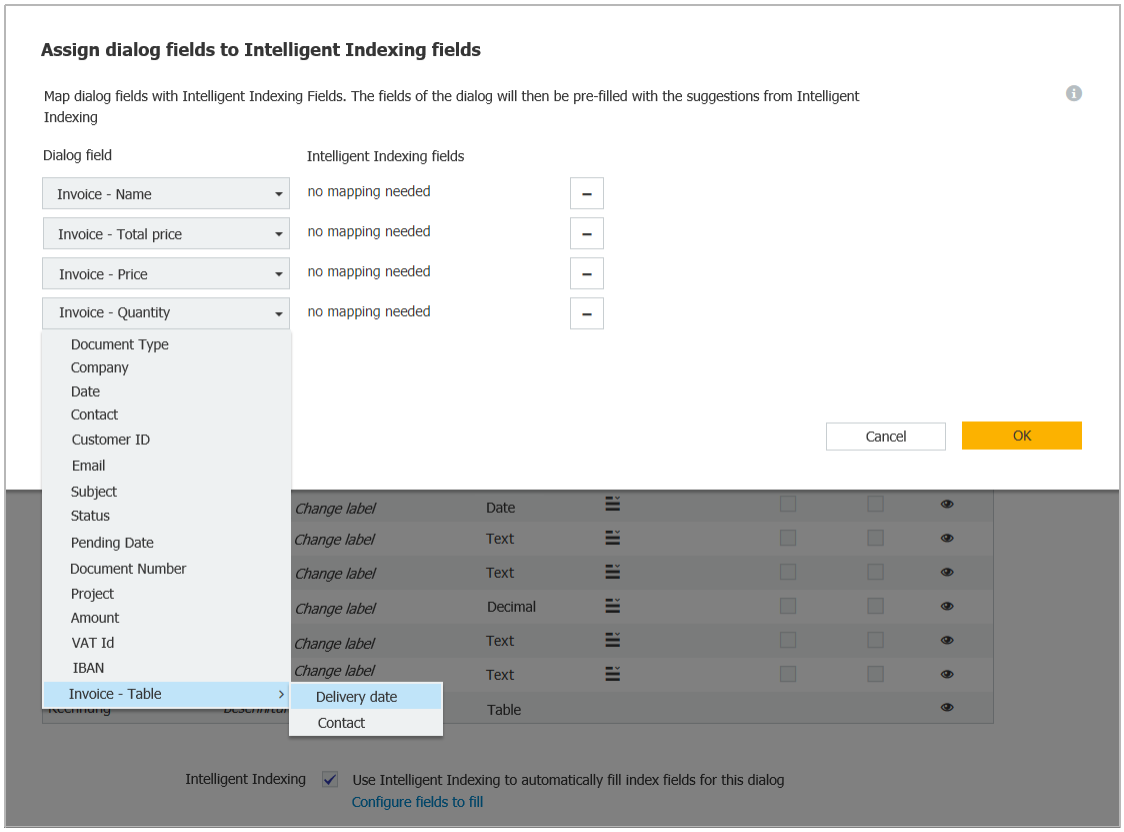
- As a basis for the split posting process (on page 7), you automatically apply all invoice items as metadata in DocuWare. A cost center for each item can then be entered and the parallel approval process started.

Benefits

- Automatically read detailed document contents and use them for process control
- Eliminates the need for slow and error-prone manual data entry

Here's how

You require a field of type *Table* (on page 24). Intelligent Indexing must also be enabled and configured for a store dialog. Include the columns of the table in the configuration. The store dialog must be used in the document tray settings.



You train Intelligent Indexing using a few invoices. The various invoice items are then automatically applied as individual entries into the table.

Note: This innovation is only available for Intelligent Indexing as a cloud service, in other words, for all DocuWare Cloud customers and for customers with an on-premises system which is using Intelligent Indexing as an additional web-based service. This new function is not available with Intelligent Indexing as a locally-installed service.

1.2 Split Posting per Table Field: Distributing Invoices to Accounts

Component: Workflow Manager

You can now use table fields in workflows to split invoices across multiple cost centers.

Application

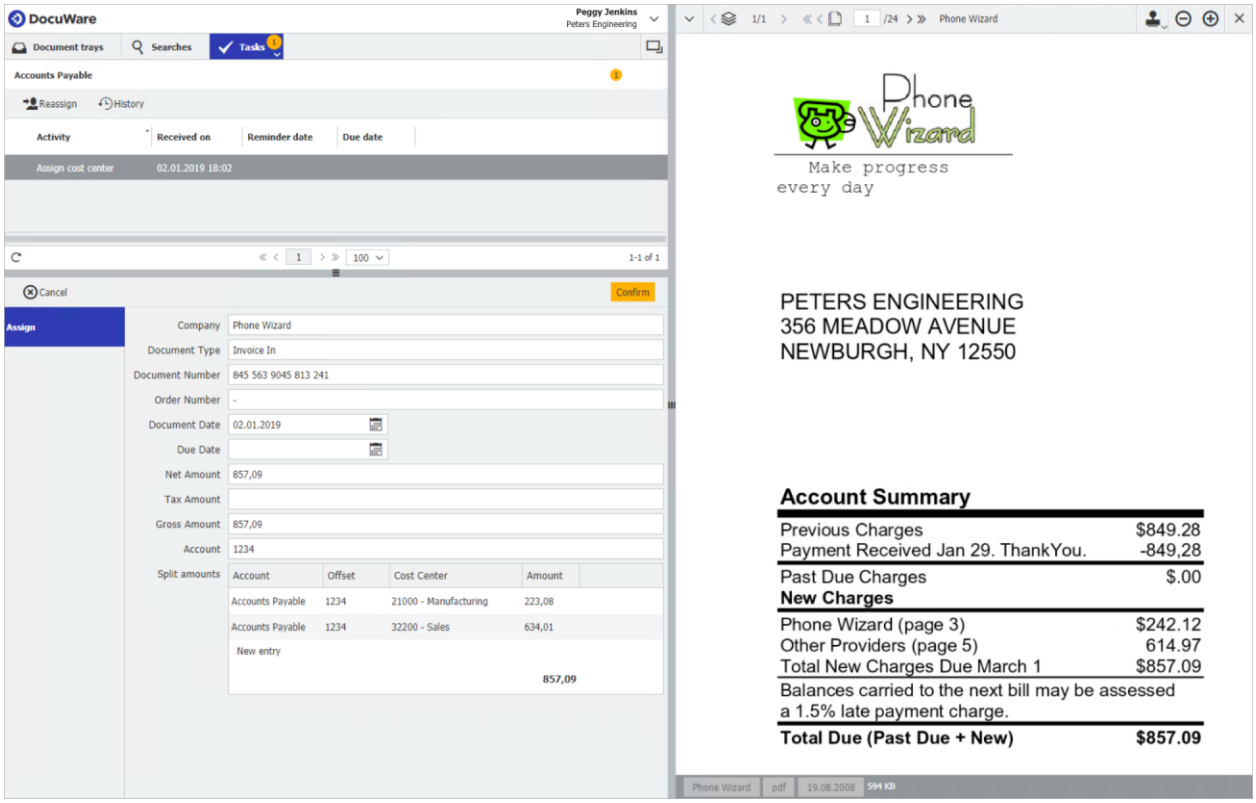
- You receive invoices whose different items need to be approved by different departments in your company. With split posting based on a table field, you can distribute the items or partial amounts in a workflow task to the relevant accounts.

Benefit

- Faster and easier editing of invoices for multiple cost centers

Here's how

1. In the file cabinet configuration, set up the required field of type Table (on page 24) so it can be displayed in your workflow.
2. In the Workflow Designer, include the table field in the dialog for invoice approval in the workflow task. The structure of the field comes from the file cabinet configuration and cannot be changed in Workflow Designer. As with other fields for workflows, however, you can still customize the field properties here.
3. Store the invoice as usual.
4. Include the invoice in a workflow task.
5. Use the table field to distribute the invoice among the various accounts.



In the upper part, you'll find all general data on the invoice and the supplier. You can create the table below simply by adding rows and selecting or entering the values.

2 Greater Workflow Performance

Fast and secure processes are critical for businesses today and are the basis for a competitive and future-proof strategy. These processes guarantee clear task assignment, prompt editing, and a structured information flow.

A set of new functions let you perform work steps within workflows even more quickly and easily. And with the new user license, you can implement company-wide workflows in a cost-effective manner, for example for application scenarios from the HR area.

2.1 Editing Multiple Tasks at the Same Time

Component: Workflow Manager > Web Client

If you select several tasks in a list, you can use the context menu to simultaneously confirm them, reassign them, or stop them.

Applications

- Release multiple invoices at one time.
- For better workload distribution at short notice, you can assign at once multiple tasks to another employee.
- A customer has payment difficulties. Therefore, you stop all current tasks at one time, such as deliveries.

Benefits

- Save time and work efficiently internally and with customers
- Error correction and stopping processes even quicker

2.2 Filtering Workflow Tasks for Greater Clarity

Components: Workflow Manager > Web Client

Display only the relevant parts for your activities: Filter the tasks in your list by date period, due date, customer name or number. You can remove a filter with just one click.

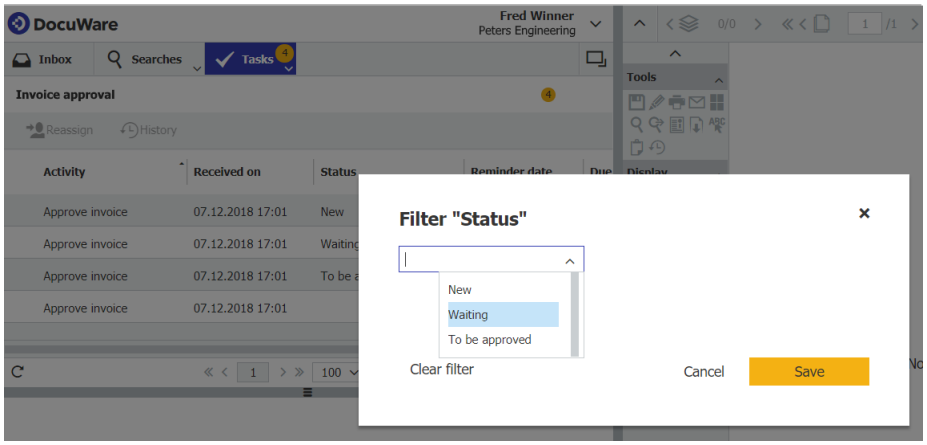
Applications

- In an order process you need to wait for payment before the order is processed further. You filter your tasks by status and hide the tasks with status *Waiting* so you can concentrate on processing those where a payment is received.
- As the controller of a workflow, you filter tasks by user. This will give an overview of the number of tasks that individual employees has to do. Filter by activity to keep track of the process for a specific activity.

Benefits

- Shortened information search times with instant current task lists
- Better overview for controllers and users

Here's how



2.3 Emails: CC Delivery and Multiple Addressees

Component: Workflow Designer

You can now also send emails in workflows to additional recipients in CC. Furthermore you can send an email straight to several addressees instead of a separate email per addressee.

Application

- You send your invoices by email. Send all emails in CC to your accounting department's store name so that you have proof of invoice delivery.

2.4 Filling Table Decimal Fields with Residual Value

Component: Workflow Designer

Decimal fields in tables can be pre-filled with a residual value. In an invoice workflow, for example, this can be the remaining amount of an invoice from which partial amounts have already been approved. See also Split posting by table field (on page 7).

2.5 Completing Forms Automatically During the Workflow

Components: Workflow Manager, DocuWare Forms

You can now automatically fill in empty form fields in a workflow. The conditions for this are: The form was created with DocuWare Forms and a fill area was assigned to the field to be filled.

Application

- To capture the data of new employees, the HR department uses a form created with DocuWare Forms. In addition to fields for first and last name, it also contains a field for the new company email address to be created.
  For each new employee HR fills in the form with the personal data. The field for the email address remains empty. By submitting the form, DocuWare creates a document and starts a workflow. One workflow step includes IT creating an email account and entering the new employee's email address in the task form. When this task is complete, the email address is written to the empty field on the document.

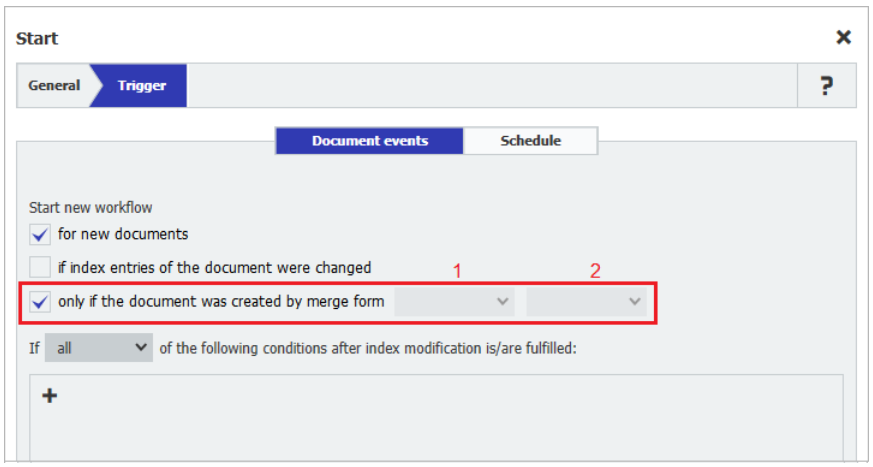
Benefits

- Efficient gathering of information
- More dynamic processes and even better collaboration
- Enables subsequent completion of form fields
- Completes tasks faster

Here's how

To be able to use the function in Workflow Manager, the document must have been created with DocuWare Forms using a merge form with fill areas and as a *fillable PDF*.

In the Workflow Designer, activate the option *Only if the document was created by merge form* under Start > Trigger. All DocuWare Forms (1) configurations and all merge forms (2) for which the logged in user has the *Use* permission will then be displayed.



In this way, you create the basis for displaying the fill areas in the Workflow Designer during data assignment. Only empty fill areas can be filled.

2.6 New License "Workflow User"

Component: DocuWare Cloud

In order to implement company-wide workflows more cost-effectively, there is a new user license named "Workflow User." This license is suitable for employees who do not archive documents themselves, but have tasks to perform within workflows and need to have read access to archived documents. Users can also fill in and save forms (DocuWare Forms) with this license.

Applications

- Implement digital personnel files for all employees: from pay slips to vacation requests and minutes of annual meetings
- Integrate departments that do not normally work with DocuWare, e.g. for invoice approval processes

Benefits

- Cost-effective implementation of all application scenarios in HR & personnel management (https://blog.docuware.com/product-news/topic/human-resources)
- Users who otherwise do not work with DocuWare can be cost-effectively integrated into workflows keeping everyone engaged in company digital processes

Here's how

The "Workflow User" license is available in addition to the cloud packages "Professional II," "Enterprise II," and "Large Enterprise II".

You can assign the license to DocuWare users either in *DocuWare Configuration* > *Product Overview* > *Named Licenses* or in *DocuWare Administration* > *General* > *Licenses* > *Client Licenses*.

3 Always in Focus: User-Friendliness

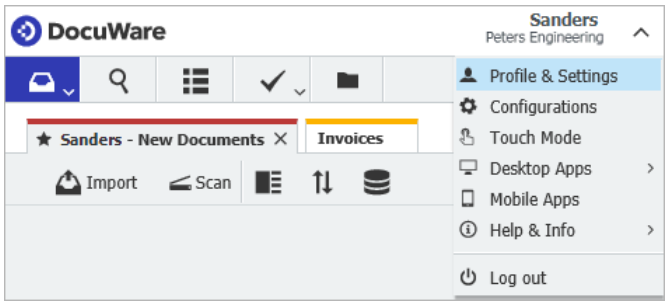
Not only should DocuWare offer you all the functions you need, it should be easy to use too. Our aim is to develop intuitive software so it can be used without assistance. That's why this version includes lots of new functions for improved usability.

User comments left in our Customer Feedback Forum https://docuware.uservoice.com/ are always taken into account when we consider where user guidance could be improved. If you have ideas, please tell us about them.
Also if you'd like to test concepts and functions for suitability before a product is released, get involved in the DocuWare Product Tester Program https://start.docuware.com/docuware-product-tester-program.

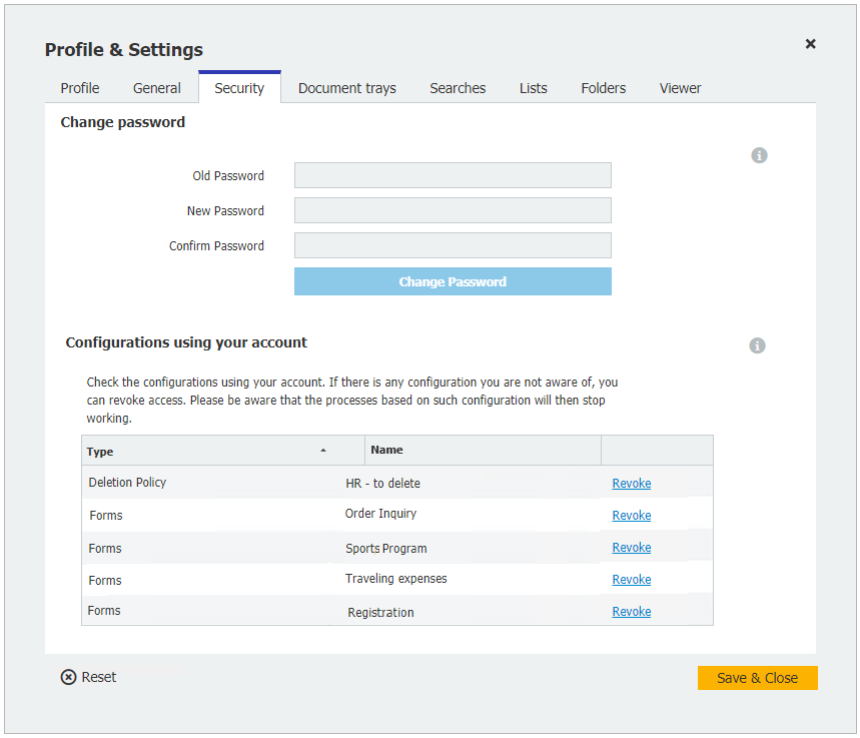
3.1 Redesigned Menu

Component: Web Client

The menu in the Web Client has been restructured. The *Profile* and *Settings* areas have now been integrated into the normal menu instead of the previous division into two parts. This gives you a clear overview of all menu functions at a glance.



There is also a new tab in *Profile & Settings* called *Security.*



In addition to the possibility to change your password, you have here, as a completely new feature, the central overview of all configurations that use your user account . If you don't want certain configurations to run under your user ID, you can also revoke it from this location.

3.2 Displaying MS Project Files in Viewer

Component: Web Client

The Viewer now supports files from MS Project for display.

Applications

- Open project files easily and clearly

Benefits

- Display other conventional file formats directly in Viewer
- Work with annotations and stamps possible for these file formats

3.3 Repeating All Jobs with Warnings at One Time

Component: Desktop Apps

In History within the Desktop Apps, you can now restart all jobs at one time where warnings are displayed.

Benefit

- Eliminates the need for repetitive manual editing for each individual job

3.4 Checking Workflow Entries

Component: Workflows Designer

You can now validate a task before completing it, in other words check the entries. You determine how this happens within the decision concerned. Previously, a check was only possible after confirming and completing the task.

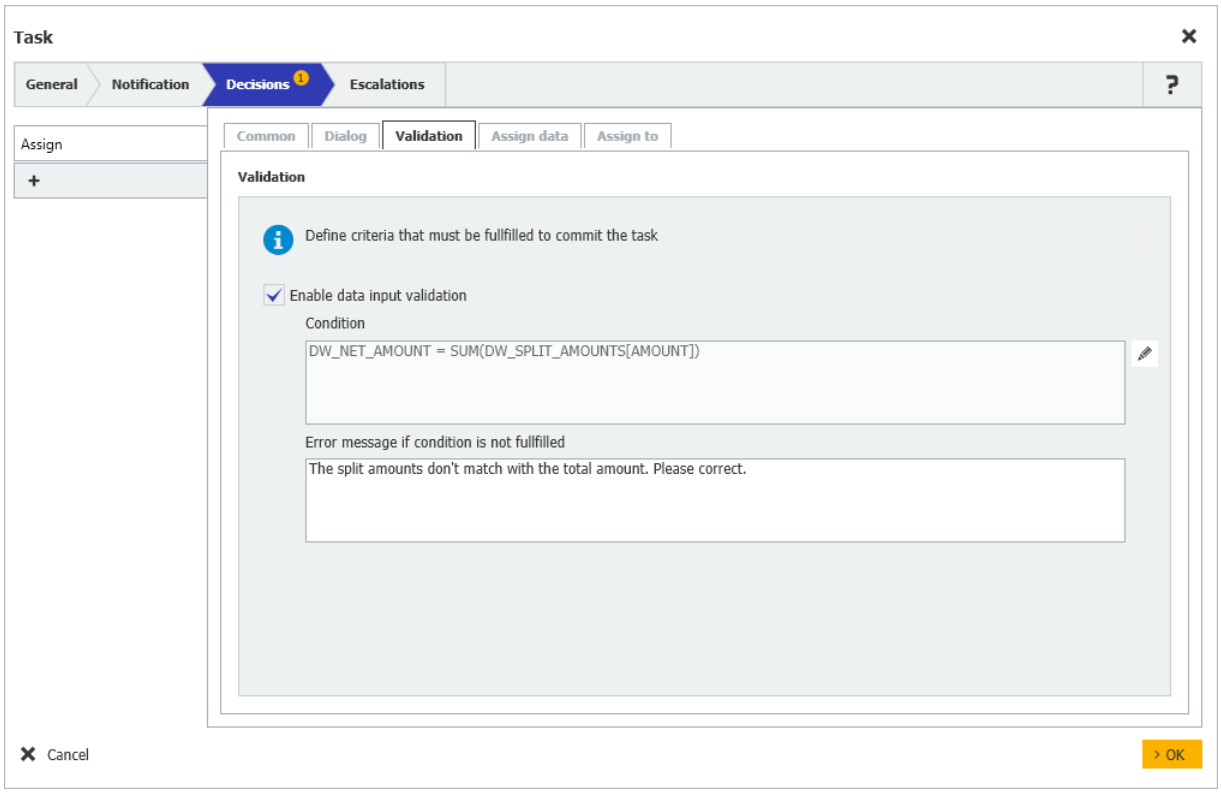
Application

- An invoice can be checked to see whether the total of the approved partial amounts in a split posting (on page 7) matches the total amount. If the validation reveals that the values don't match, the user will get a message.

Here's how

You configure the new validation in the Workflow Designer > Task > Decisions > Validation.

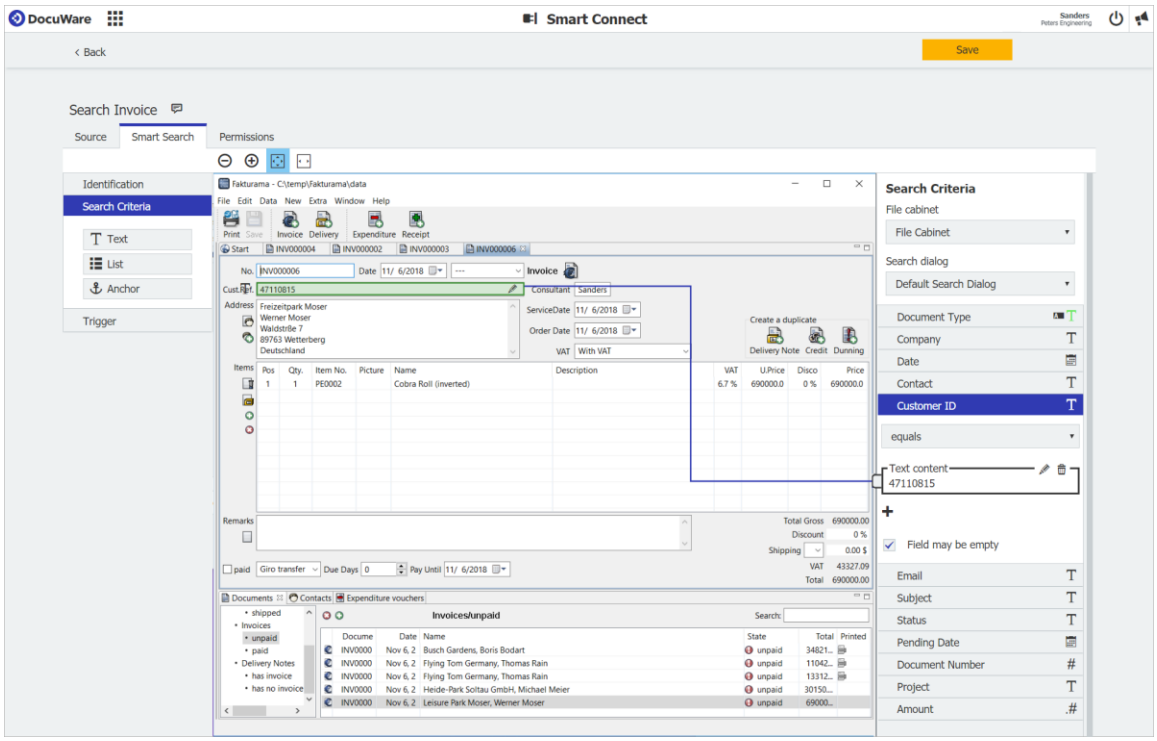
On the new Validation tab, enter a Visual Basic expression that will be applied if the user confirms the task. If the validation returns an error, the user will get a message, which you can also specify here. The VB expression can use variables and values from index and form fields from the current decision.



3.5 Smart Connect in a New Interface

Component: DocuWare Configuration > Smart Connect

You can now set up Smart Connect even more easily and integrate DocuWare in third-party applications, like your ERP. The configuration interface of Smart Connect has been completely reprogrammed based on HTML5.



New configuration options

- **Customize read out text:** You've integrated DocuWare in your ERP and you've configured a Smart Search for invoices. You manage all your invoice numbers in your ERP with twelve digits, possibly with leading zeros. In DocuWare, invoices are stored without leading zeros. To search for invoice numbers, remove the leading zeros in the Smart Search.
  You can also remove spaces or replace characters in read out text.
- **Limit search in keyword field:** In a Smart Search configuration, you can assign read-out text to a keyword field. The searched text can now be further limited with the operators "begins with," "ends with," "contains," and "equals."
- **Identification of the application simplified:** The identification of the application can be more precisely defined with the following options: "begins with," "ends with," "contains," and "equals."

Benefits

- Improved user guidance
- Fewer configuration steps required
- Appearance as in the Document Processing component

Here's how

You configure Smart Connect in DocuWare Configuration > Smart Connect. You can continue to use configurations created with DocuWare up to Version 7 without adaptation.

3.6 User Management Complete

Component: DocuWare Configuration > User Management

User Management within DocuWare Configuration is now complete. In addition to users, you can now create and edit groups, roles, and function profiles there.

Applications

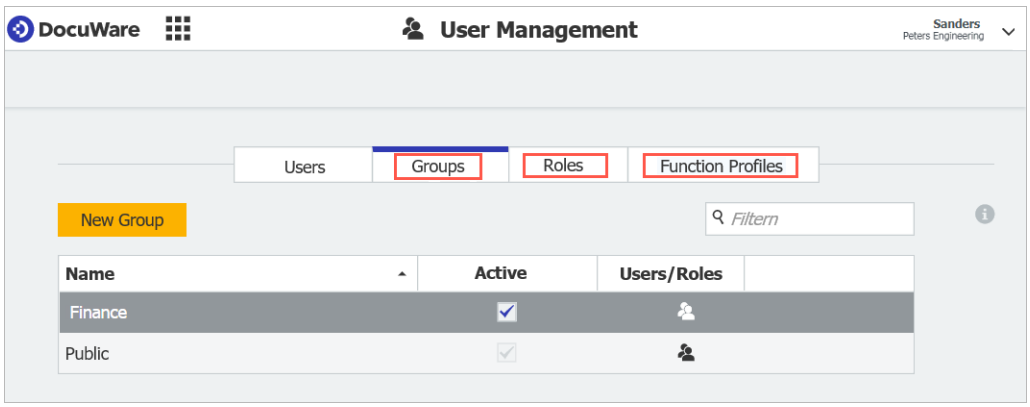
- Manage groups: Define members of the group and assign rights to the group using roles
- Manage roles: Combine function profiles, file cabinet profiles, and dialogs in the role and assign them to users and groups
- Manage function profiles: Combine functions and stamps in the function profile and assign them to users and roles

Benefits

- Complete and standardized rights management within the DocuWare Configuration
- Increased user-friendliness, for example, administering complex user and rights systems is made easier with the search and filter option in the relevant overview of groups, roles, and function profiles

Here's how

User Management is located in the *General* section of DocuWare Configuration. In addition to the *User* tab, there are now other tabs for G*roups, Roles,* and *Function Profiles*.



3.7 Defining Mandatory Fields per Dialog

Component: File Cabinets

Mandatory fields ensure that all important index information is entered during storage. The handling of required fields is now more variable as you can define which index fields have to be filled in and which ones are optional per dialog. Store, search, and index dialogs can each have their own mandatory fields.

Applications

- A file cabinet contains various document types, including invoices, delivery notes, and documentation. Each document type can be stored using appropriate store dialogs with its own set of required entries.
- Employees have different dialogs depending on their area of responsibility; an index field in one area of responsibility might be mandatory but optional in another area.
- You provide a search dialog on your company website. When customers, for example, fill in the required fields "Name" and "Order number" they can display their order details.

Benefits

- Flexible use of required fields
- An index field can be both mandatory and optional within a file cabinet

Here's how

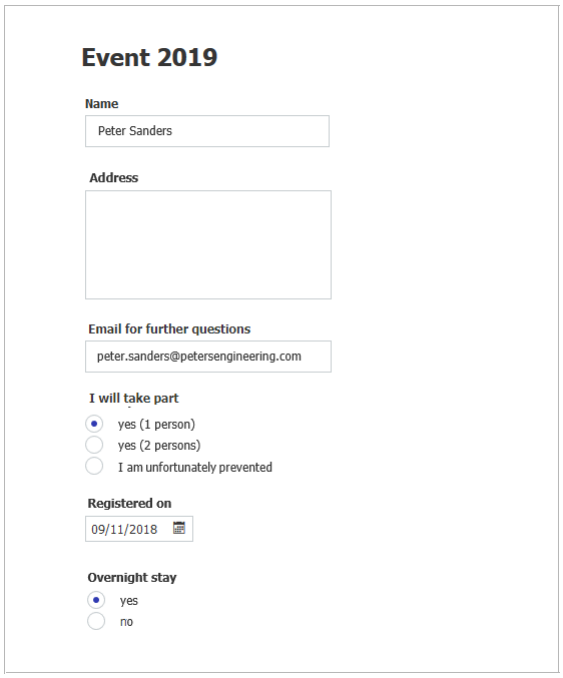
Under *DocuWare Configuration > File Cabinets* call up the appropriate store, search, or index dialog. Enable the *Required* option in the settings for the dialog field.

When updating to DocuWare Version 7.1, the required option for fields that were previously defined as required fields at file cabinet level, is applied to the respective dialogs.

3.8 Predefined Entries for Form Fields

Component: Forms

Predefined form entries often eliminate the need to manually complete form fields. When you call up the form, the fields are duly filled, for example with the current date and the name and email address of the logged-on user. If necessary, the entries can be customized.



These entries are proposed to the user when the form is loaded. You can apply them or enter your own values

Applications

- The current date is already entered in each new form.
- If the employee wants to register for the company event, values such as user name and email address stored in DocuWare are pre-filled in the form.
- When registering for a multi-day event, the "Overnight" option is pre-selected by default in the list box.

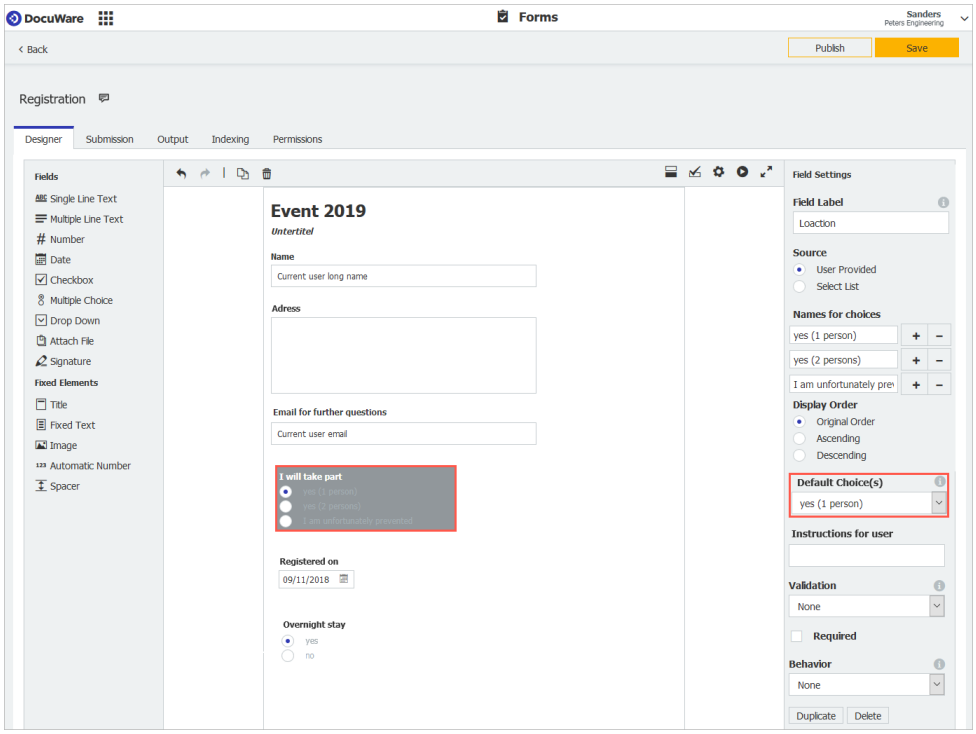
Benefits

- Fill in forms quickly and easily
- Correct and uniform data entry when applying pre-filled fields

Here's how

You specify predefined entries during form configuration. Under *DocuWare Configuration > Capture > Forms > Designer*, open the settings of the field for which you want to display a default entry. Select an option from the list under *Predefined Entry*.

For fields with select options such as multiple choice, you can set an option under default selection:



3.9 Match Form Entries

Component: Forms

The entries in form fields are checked for consistency before sending. The form is submitted only if the entries match your defined specifications or – in the case of text, date, and number fields – the entries in other fields.

Applications

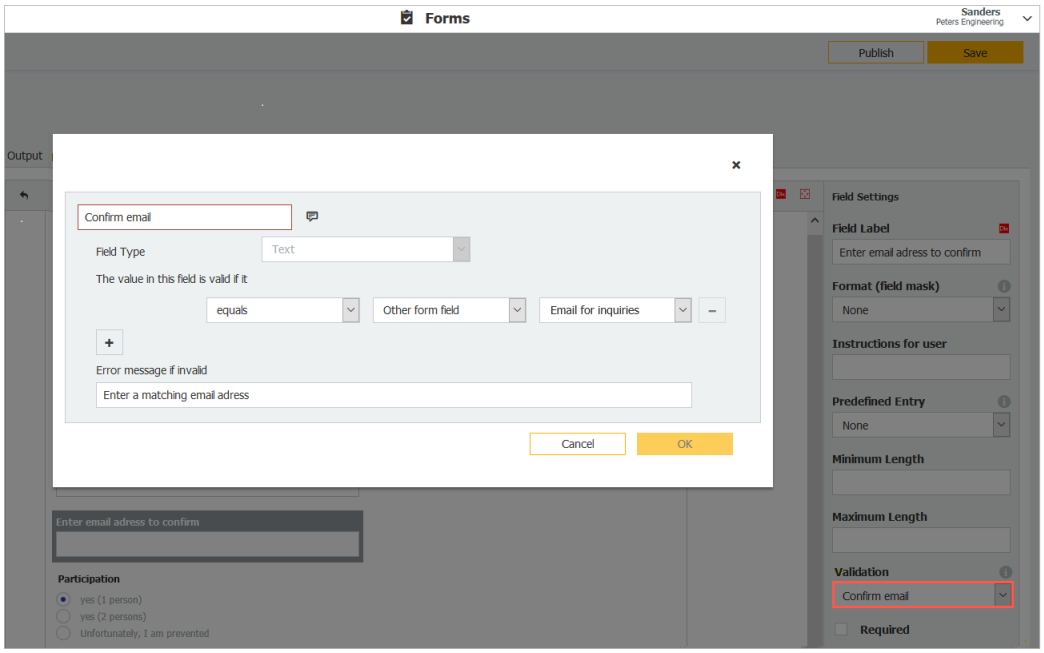
- Query the email address twice. This will ensure that the email address has been entered correctly in the form.
- If the user enters an age below 18 years old, he or she will be duly notified when age of majority is checked.

Benefits

- Form submits applicable values only
- Incorrect entries are avoided

Here's how

You define the specifications for the form fields as a validation which refers to entries in other fields of the form. Open *Designer* under *DocuWare Configuration* > *Capture* > *Forms*. In the field settings on the right, click *Add* under *Validation*. Different specifications are available for form internal validation depending on the field type. Here you can see a possibility of validation for matching the email address.



3.10 Public Forms – also for DocuWare as On-Premises System

Component: DocuWare Forms

In on-premises systems, you now have the option to release forms for public use. This allows people to fill out forms and transfer them to DocuWare even though they do not have access to your DocuWare system.

The function *Public Forms* is now available in the normal DocuWare Forms license.

Applications

- Application forms for events also for external users: each registration is archived directly in DocuWare and the further processing can be controlled via a workflow.
- Web Form applications on your company's careers website: the incoming applications are archived, indexed, and forwarded directly in DocuWare.

Benefits

- Easy linking of data from external employees, partners, or customers
- Accelerated information flow

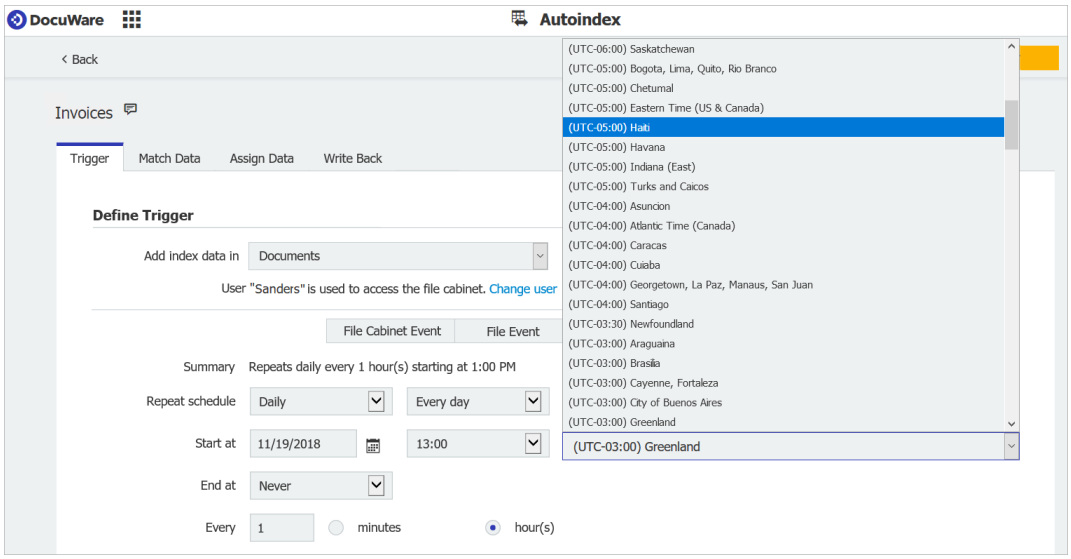
Here's how

In DocuWare Configuration, enable the option *Public Forms* for the Web Form. In the configuration, you also enter a DocuWare user whose account is used to save the transmitted forms.

3.11 Individual Time Zone for Automatic Processes

Components: DocuWare Configuration > Autoindex, Transfer, Synchronization, Deletion Policies

A configuration always displays the time for job execution in the time zone in which the configuration was created. If your Windows time zone is different, a list will appear so you can select your time zone. This makes it easier to customize job execution since you don't have to work out the time difference.



3.12 Default Credentials in Automated Processes

Components: Job configurations and Workflow Manager

The job configuration of the modules Autoindex, Deletion Policies, Request, Synchronization, and Transfer eliminates the additional input of credentials.

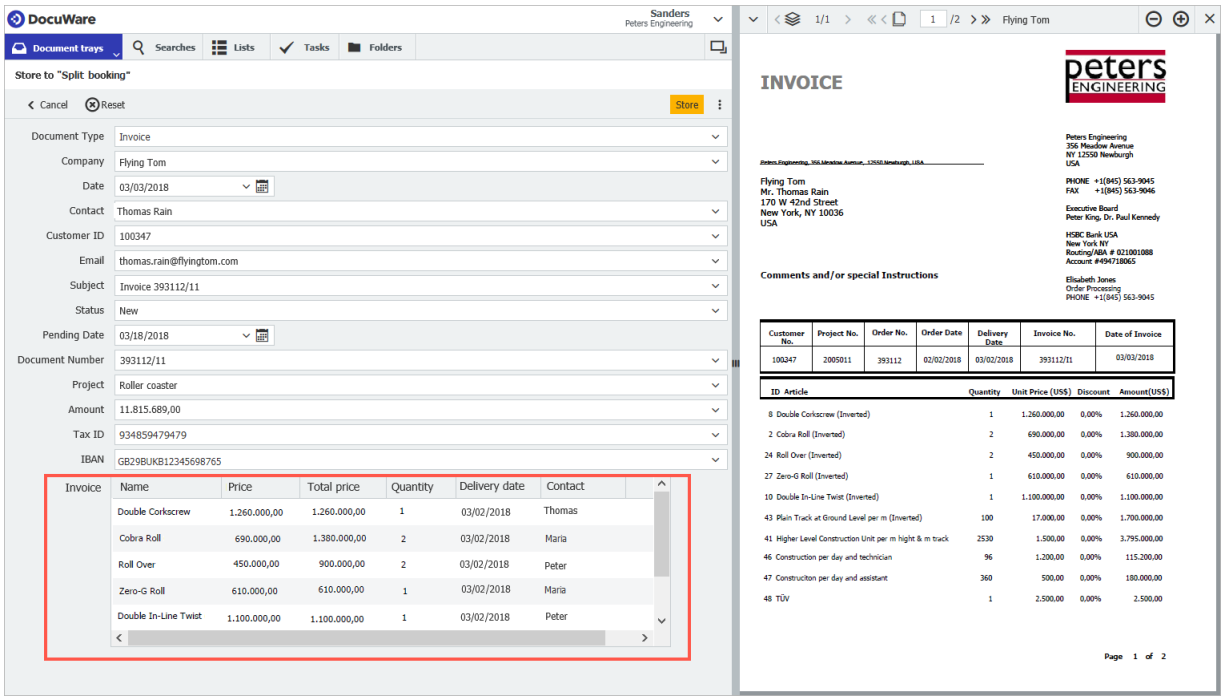
- The ID of the user logged on in the system is automatically applied for execution. It's only necessary to enter credentials during configuration if the job is to be executed with the ID of another user.
- The configurations continue to run after the password has been changed for the system user. The data doesn't have to be re-entered within the relevant configurations - this also applies to workflows.

4 Other Configuration Innovations

4.1 Setting Up a Table for a Store Dialog

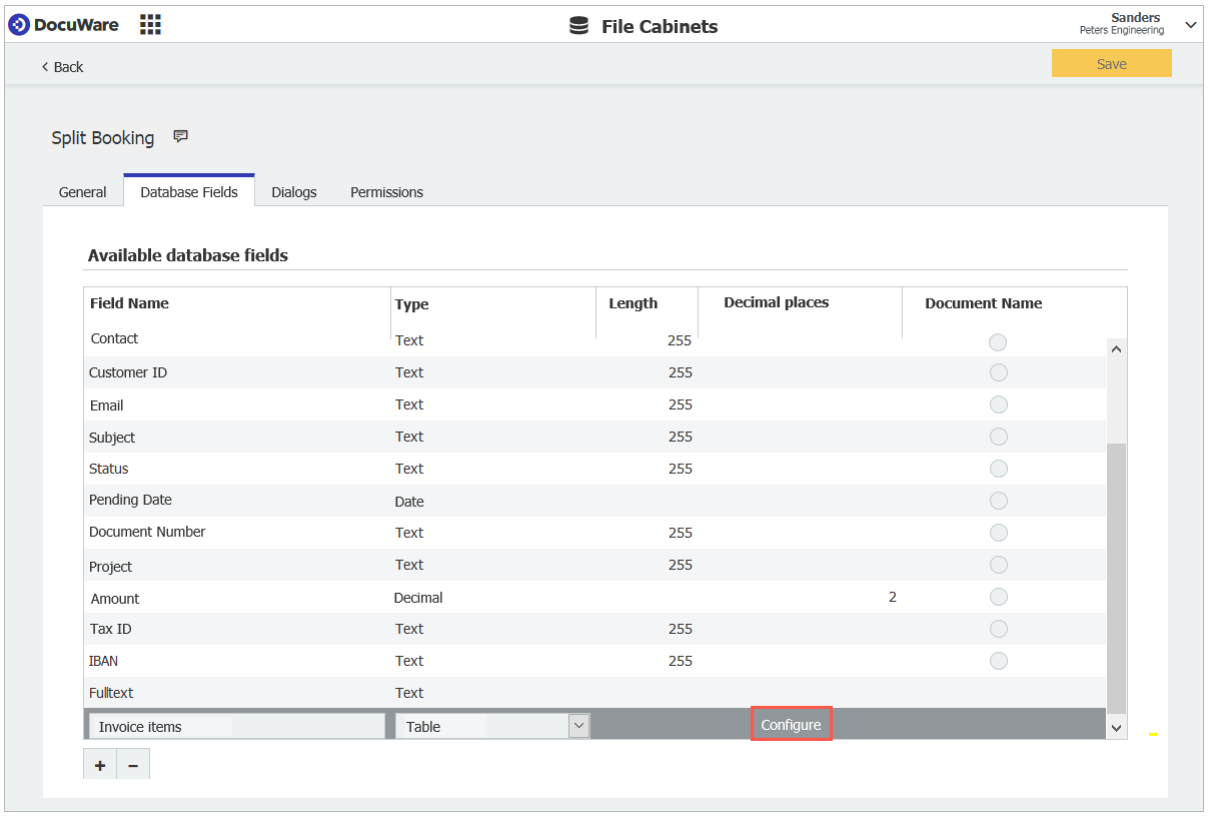
Component: DocuWare Configuration > File Cabinets

The new field type Table allows you to capture data in tabular form in the store dialog. This kind of table within a store dialog is used in split posting workflows (on page 7), for example to distribute invoices to several cost centers. A table consists of several fields, which are displayed in Web Client as columns of the table.

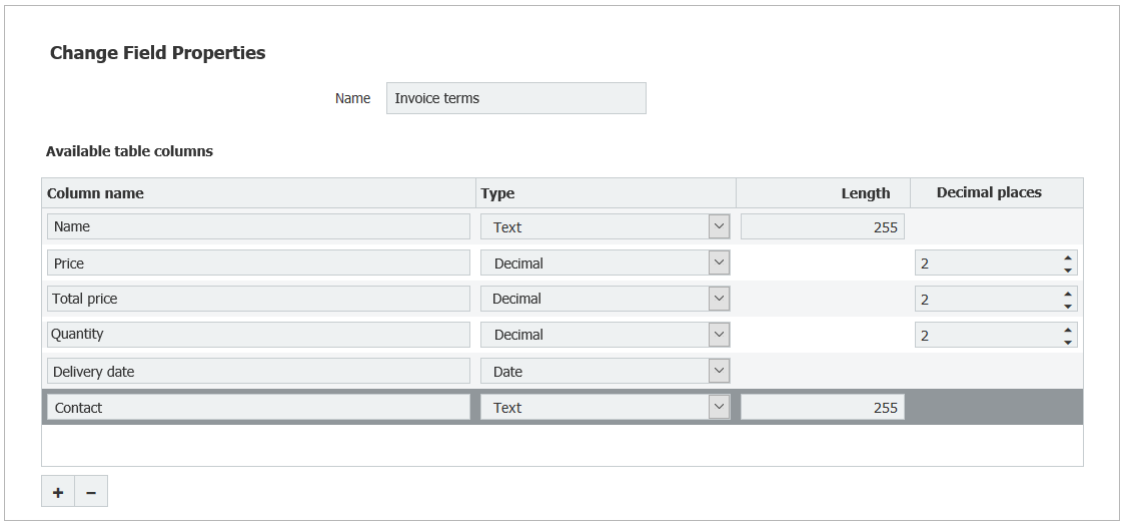


Here's how

Tabular fields are set up in the file cabinet area of DocuWare Configuration. Call up the *database fields* in the settings of an existing file cabinet and create a new field of type *Table*.



The field types text, decimal, and date are available for the columns of a table. You can create up to 50 columns within a table:



A table field can be added to the store and index dialogs of a file cabinet; it is not displayed in result lists. You search for the contents of a table using fulltext.

As with other index field types, One Click Indexing, field masks, select lists, manual entry, and Intelligent Indexing (on page 6) are available to fill a table during storage.

4.2 Optimized Form Configuration

Component: Forms

To make working with forms simpler, the following improvements are integrated in form configuration:

- Filter option on the overview page: Find a particular form faster, especially if you've got lots of form configurations.
- Full screen mode: During configuration, display the forms over the entire screen. You can do this for both Web Forms and Merge Forms.

4.3 Automatically Deleting Entries from Index Fields

Component: Autoindex

Use Autoindex to automatically remove specific index entries of archived documents.

Application

- In a keyword field of the invoice store, all items of the respective invoices are listed. For optimal performance delete all entries for the posted invoices from the keyword field to reduce the data volume in the case of large quantities of documents.

Benefits

- Saves time: Deletion is automatic instead of manual using the index dialog in Web Client.
- Unlimited: With Autoindex delete the entries of as many documents as you want. In this way you can avoid the limit on the manual deletion of entries in Web Client.

Here's how

In an Autoindex configuration select the index field on the *Assign Data* tab whose entries you want to delete and set *Empty Entry* as the fill option.

4.4 Sending Emails via Business Address – Now with DocuWare Cloud

Component: Mail Services

DocuWare Cloud customers can now send emails for workflows and email notifications via separate SMTP connections instead of via the standard SMTP of the DocuWare system. You can create an SMTP connection for notifications and workflows.

Applications

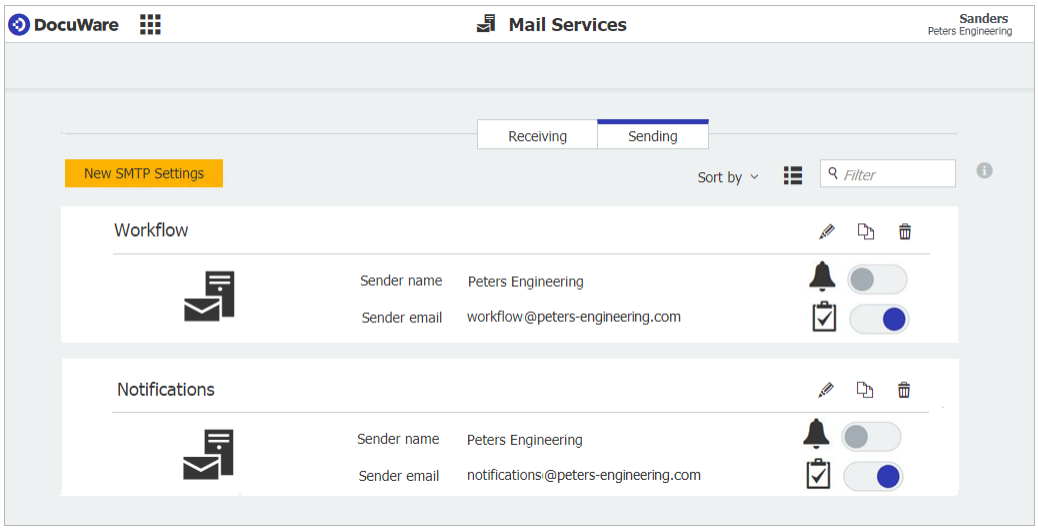
- For emails that are sent as part of workflows, select the email address and the sender name. The invoice to the customer is sent with the sender "workflow@peters-engineering.com" and not with the address of the DocuWare system.
- Define a separate sender for email notifications. The reference to new pay slips can now be sent via "notifications@peters-engineering", for example.

Benefits

- Freely selectable sender address for outgoing emails
- Creating recipient confidence with known sender addresses

Here's how

The SMTP connections for sending emails are now created browser-based in the *Mail Services* module in DocuWare Configuration.



4.5 Central Management of Web Services

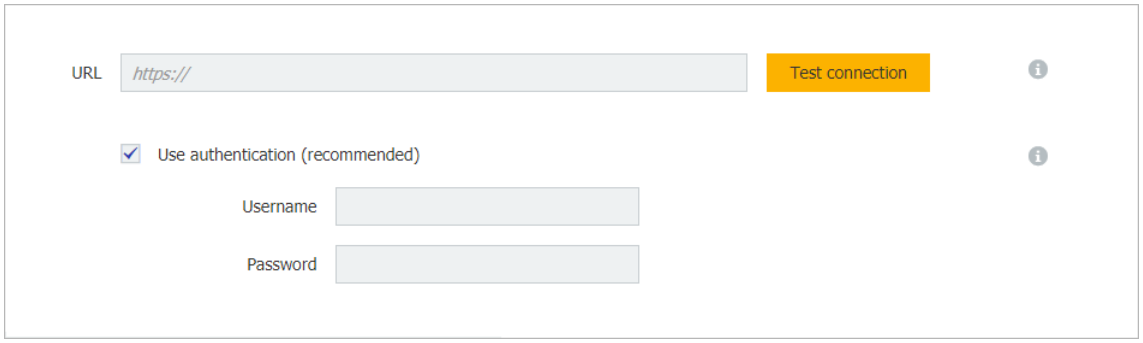
Component: DocuWare Configuration

Web services for DocuWare can now be centrally managed in a separate area of DocuWare Configuration. The web services stored there are available in select lists in the module configurations that work with web services, in other words for workflows in Workflow Designer and for validations in file cabinet configuration.

Benefits

- All web services for DocuWare at a glance
- Increased user-friendliness: Provide web services for other users

Here's how



You can find examples of web services at Workflow Manager (SOAP) https://www.docuware.com/main.asp?sig=dld&lan=en&loc=de&dwdblan=english&dwdbkat=do*&dwdbname=sample+web+service and Valididation (REST) https://github.com/DocuWare/Validation-NodeJS-samples.

4.6 Fast Import of Minor Updates

Component: DocuWare Setup

You can now carry out minor updates to your DocuWare on-premises system within minutes thanks to a new setup type. All you do is click through a minimum of dialogs and all the necessary changes will be done automatically. In addition, it's usually only files that are exchanged on the server computer, but the database is not updated.

4.7 Changed System Requirements and Technical Notes

Compared to DocuWare Version 7, there are the following changes to the system requirements:

- Windows Server 2019 is now also supported as operating system for DocuWare Server and Clients.

To upgrade to version 7.1, you need at least a DocuWare version 6.7 installation.

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

Technical release notes

Before upgrading to version 7.1, please check the extent to which the changes with DocuWare version 7.1 are relevant to your system.
If you are updating from a version earlier than DocuWare 7, please inform yourself about the changes with DocuWare version 7.

For the update to DocuWare version 7.1 you need at least DocuWare version 6.7.