What's new in DocuWare Version 6.8

Docuware

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DocuWare

1 DocuWare Version 6.8

The complete DocuWare feature set is now available in the Web Client. Only there can DocuWare continue to become faster, more secure, and more convenient through use of the latest technologies. The time had come to replace Windows Client with Web Client. This means that version 6.8 is the first without the DocuWare Windows Client. Therefore the modules and interfaces set up on Windows Client, such as ACTIVE IMPORT and Toolkit, are no longer included. Of course, the functionality is still there, but must now be used with more modern modules and interfaces suitable for Web Client. More on Essential New Features of Version 6.8 (on page 27).

Replacing Windows Clients has enabled us to generally develop the DocuWare system. For example, restrictions on the number of index fields and the length of index entries no longer apply. Even if you have already made the switch to web technology, you should still find out about the Changes in the DocuWare System (on page 28).

And last but not least, there's a new add-on module as of Version 6.8. With DocuWare Forms you can create, fill in, and automatically archive forms in DocuWare. Form inputs can be used as index values and automatically inserted into existing forms. More information can be found here (on page 15).

2 Storing Documents

2.1 Scanning and Storing

2.1.1 Detail View for Orders – With Display of Divided Documents

Component: DocuWare Desktop Apps

History has a detail view for each job with important information. This includes information about separated documents.
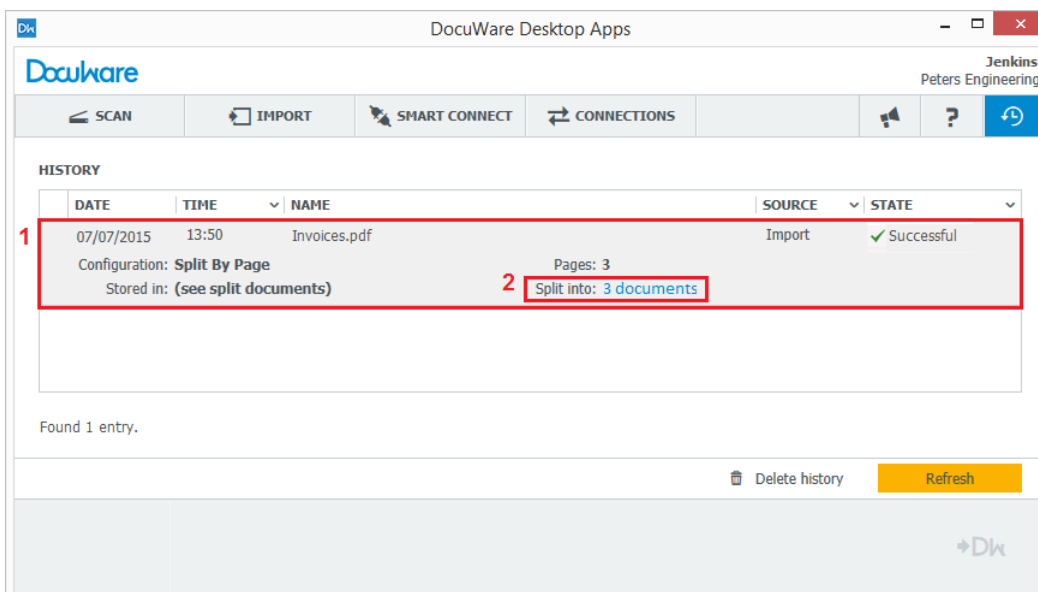
👤 Application

You are batch scanning several invoices and importing the document in DocuWare. The invoices are again divided into individual documents during import. The detail view enables you to immediately see whether all the documents are successfully stored.

➕ Benefits

- Better overview for faster work
- Immediate intervention in the case of error messages

⚙ How to use the function

The detail view of each job (1) also tells you how many documents your document has been separated into (2). You can in turn open an new view of the divided documents by clicking on the separated document indicator (3).

You can see all newly established documents and their status in the separated documents view. The "Update" button enables you to update each of the views.

2.1.2 Filtering History

Component: DocuWare Desktop Apps

You can conveniently filter job history in DocuWare Desktop Apps according to your requirements.

⚙ How to use the function

There are three filters available: for date/time, source, and status.

2.1.3 Indexing at the Click of a Mouse in Windows Explorer

Component: Windows Explorer Client

If you store a document in the Windows Explorer Client, the Viewer is available with an integrated index dialog as in the Web Client. You can now also enjoy the convenience of One Click Indexing in Windows Explorer Client.
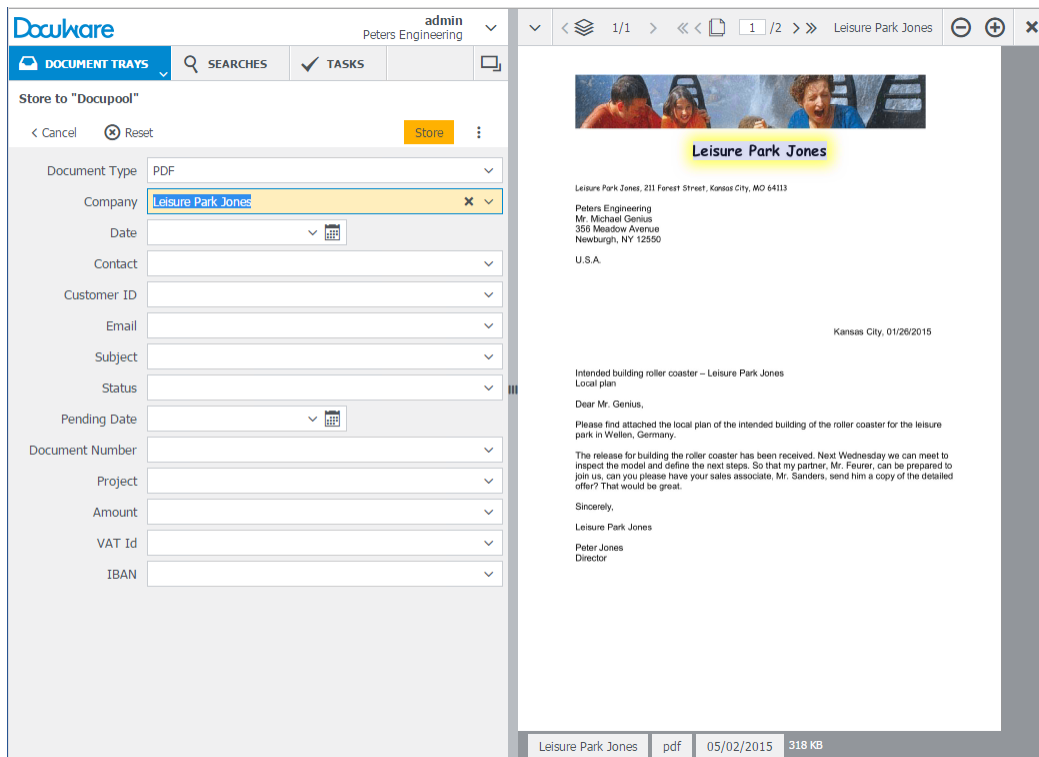
In the new index dialog with Viewer, the One Click Indexing tool is sufficient to copy a line to an index field – in this case Leisure Park Jones.

Applications

- One Click Indexing makes manual indexing even easier. If you move the mouse over the document, then words, date information, and even figures are selected as an area. If you click on one of these areas, the content is automatically transferred to the active field of the store dialog.

- If you store a document, you now have the store dialog directly in view beside the displayed document. This view variant is especially handy when you are working with two screens. You can you can move the folder view of Windows Explorer Client to one screen and the Viewer with the index dialog to the second screen.

⊕ Benefits

- Simple indexing with One Click Indexing
- Document and index entries at a glance
- Optimum view when working with several screens

⚙ Where to select the view

The index dialog with integrated Viewer opens by default if you drag a document to a folder in Windows Explorer Client or store it from the document tray.

2.1.4   Connecting Mobile Apps to DocuWare

Component: DocuWare Hub

Among other things, DocuWare Hub enables you to store PDFs and image files from any other app in DocuWare. In DocuWare Hub, set up one or several connections to DocuWare which are available for all installed apps. You can store to document trays and file cabinets, allowing documents to be indexed before uploading. What's more, setting up connections to DocuWare is easy with a QR code; you can find in the main menu of the Web Client.

DocuWare Hub runs on all smartphones and tablets with operating systems as of iOS 8.0, Android 4.0, or Windows Phone 8.1.

⊕ Benefits

- DocuWare Hub can be used with all mobile apps
- Easy connection setup with QR code
- Central administration of all DocuWare connections in a single app

⚙ How to call up the function

Call up DocuWare Upload from the relevant app – below, for example, iOS with "Open in" and Android with "Approve."

2.2 Printing and Storing

2.2.1 Filtering Out Spaces and Zeros From Recognized Text

Components: DocuWare Printer, Import Configurations

In order to restrict the content of the index fields to what is essential, you can automatically remove spaces and leading zeros from the recognized text.
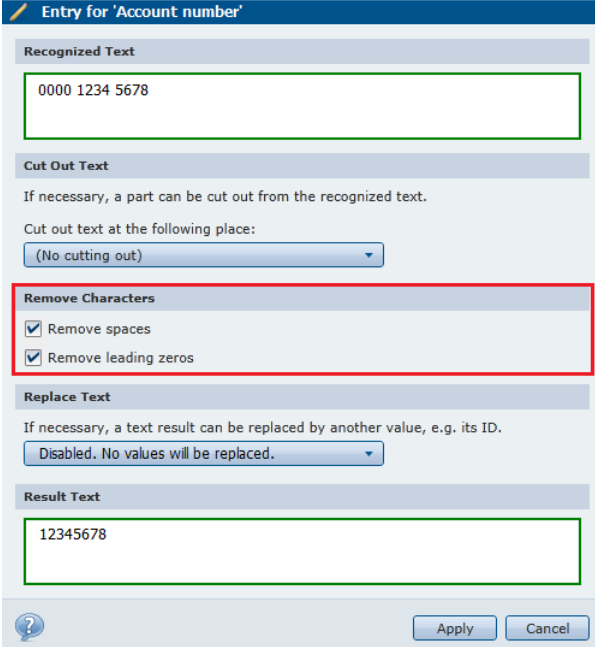
Application

You want to read the area in invoices where the SWIFT code or the IBAN appears. Since the SWIFT code or the IBAN is often entered with spaces, activate the *Remove spaces* option.

Benefits

- No more manual post-editing
- Only important information remains

How to use the function

In the printer configurations, find the filter function on the indexing and ZUGFeRD pages by clicking Edit for an index field. (ZUGFeRD is the German standard for electronic invoicing.) In the import configurations, find it on the indexing page.

2.3 Email Management

2.3.1 Blocking File Formats for Email Storage

Component: Connect to Outlook

Any file format can be excluded from email storage.

Application

Email signatures frequently include business cards or company logos as picture elements which are unnecessarily archived during storage as a separate page or file. To avoid this, file types can be blocked. You can also specify the size of the file to be blocked. This means that in the case of image files, you can make sure that only the few hundred kilobytes picture elements in the signature are excluded. The usually larger image files in the attachment continue to go to the file cabinet.

Benefits

- Only relevant email content is stored

How to set up the function

In the *Options 2* tab of the storage configurations of Connect to Outlook, find the option *Exclude attachments of certain file types from being stored to the file cabinet*. You can extend the suggested list or delete file formats.

3 Finding and Displaying Documents

3.1 Parts of Documents Selectable for Emailing

Component: Viewer

You can now email individual pages and individual files of a document straight from the Viewer. Individual pages are always converted into PDF format. Files can also be sent in original format.
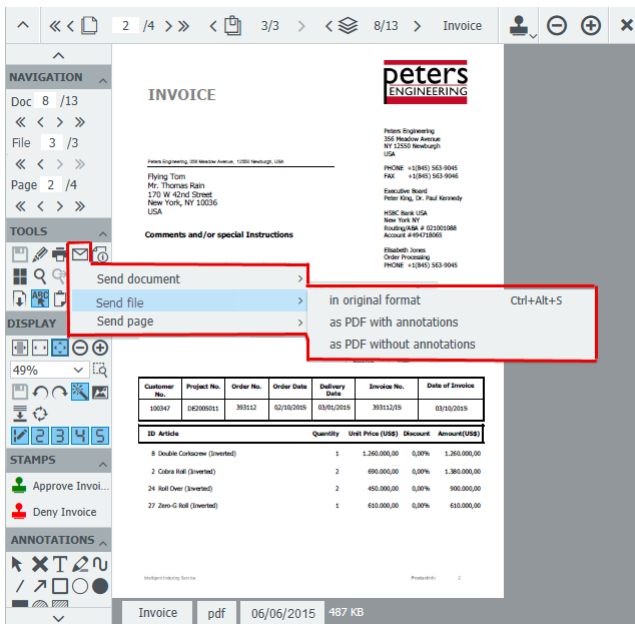
Applications

- In order to answer a customer's query, you only want to send the relevant page from the price list, not the entire list.
- A project plan consists of an Excel overview and several attached sketches. You want to send to a coworker only the sketch that is relevant to them.

Benefits

- Sending the exact parts of documents that are needed
- Forwarding information easily

How to use the function

Open the document in the Viewer and navigate to the relevant page or file where the part you want to send is located. Click ✉ *Send* , then select *Send page* or *Send file* and select original format or PDF with or without annotations, depending on need.

4 Workflow

4.1 Controlling Complex Business Processes Professionally

4.1.1 Displaying Document History in Context Menu

Component: Workflow Manager

For each workflow task, you can use the context menu to open the history for the document in question.

⊕ Benefit

▪ Quick and direct access to document history

⚙ How to use the function
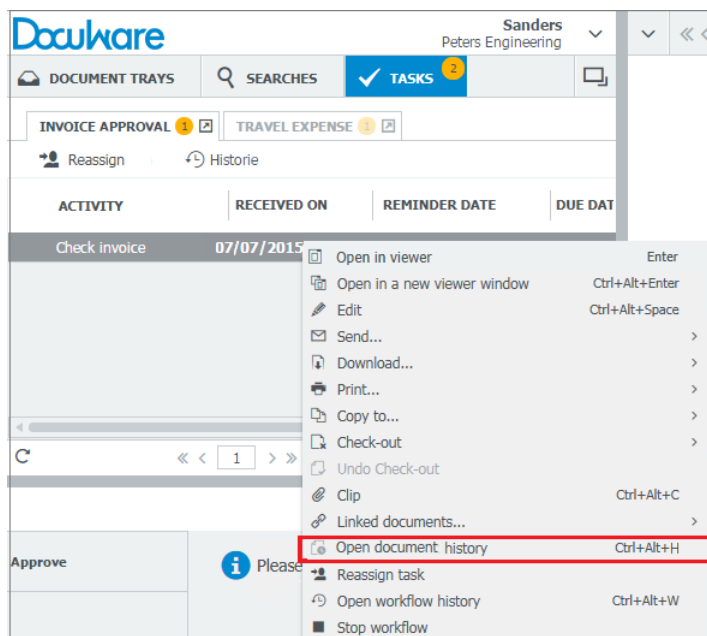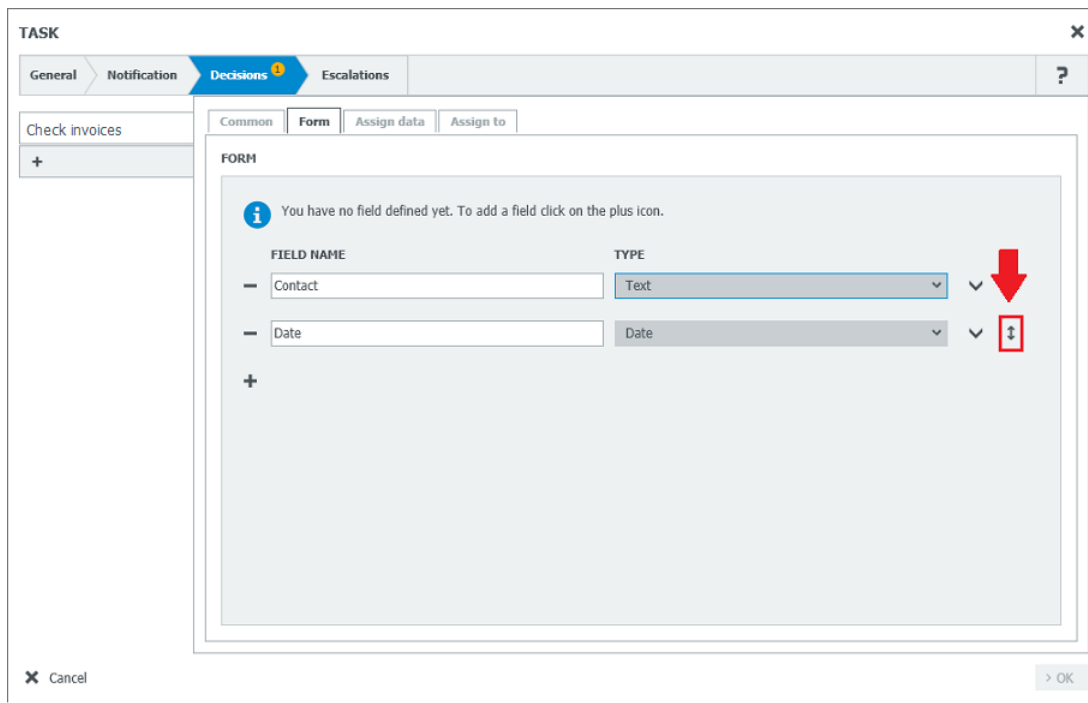
Open the context menu by right-clicking on the task.

4.1.2 Changing Order of Decisions and Form Fields

Component: Workflow Manager

In the Workflow Designer, you can easily edit the order of decisions and form fields for tasks.

⚙ **How to use the function**

If you move the mouse over the right-hand area, an arrow button appears with which you can move the decision or form field up or down.

4.1.3 Updating Information About Workflow Instances

Component: Workflow Manager

In the Workflow Designer, you can update the list of active instances of a workflow in the workflow overview with the ↻ *Refresh active instances of workflow* button.

➕ **Benefit**

▪ Controllers always have all active instances in view

⚙ **How to use the function**

Workflow Designer > tab *Overview* > Select relevant workflow > tab *Active instances*

5 Teamwork

5.1 Editing Similar Processes Efficiently

Component: DocuWare Forms

Forms are important resources for businesses and public organizations alike. However, manually filling them out often leads to errors when transferring data to eletronics data processing (EDP). Recording data twice also costs time and money. The new DocuWare Forms module manages forms much more efficiently. Data is input directly into a Web Form and the completed forms are stored in a file cabinet. Once centrally stored in DocuWare, the data can be easily copied to other applications via Workflow Manager, Autoindex, or Smart Index, for example.

👤 Application

DocuWare Forms speed up the processing time for similar procedures, such as recruiting new staff. The business requires a lot of information from each employee, including address, insurance information, and bank details. Some data needs to be sent to various official authorities and institutions, while other data is needed by internal departments. Everything is quick and structured using DocuWare Forms. The new employee enters all their details into one Web Form and transmits it to the HR department. The completed Web Form can be linked to forms for official organizations and departments so that the relevant data can be entered there and automatically stored in the file cabinet.
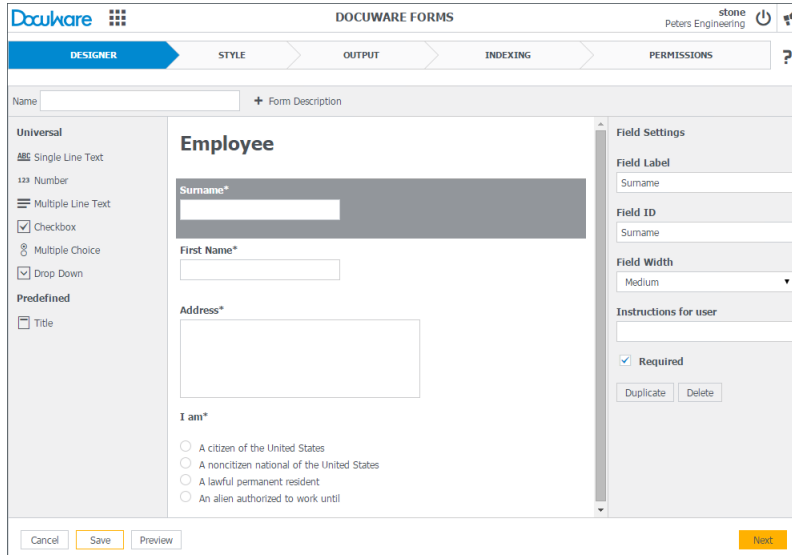
You can find out more about the application cases in the DocuWare Forms (http://pub.docuware.com/en/docuware-forms) datasheet.

➕ Benefits

- Intuitive editor for new forms
- Existing Merge Forms can continue to be used
- No redundant data input
- Forms can be incorporated into workflows and lists

⚙ How to configure DocuWare Forms

Forms are created and edited in the DocuWare Configuration. A wizard guides you through the individual steps from arranging the form elements to storage and permissions. The user receives a link (by email, for example) in order to complete a form. The recipient can complete and send the form directly in the browser.

In an overview editor, elements such as text fields, checkboxes, or lists can be inserted into the form page using drag & drop.

6 Additional New Features and Improvements

6.1 Managing DocuWare

6.1.1 Modified System Requirements

No longer supported:

- Internet Explorer 9
- Windows Vista

Please also note the conditions regarding hardware, which are newly listed in the System Requirements (http://help.docuware.com/en/#t55049).

6.1.2 Lifting Restrictions on Index Fields

From Version 6.8, there are no longer any restrictions:

- on the number of index fields per file cabinet
- on the number of individual field types per file cabinet
- on the number of entries in a keyword field

In the case of keyword fields created as of DocuWare Version 6.8, individual keywords can be up to 255 characters long.

6.1.3 Creating File Cabinet in a Few Clicks

Component: File cabinet administration

As of now, you have two options of setting up file cabinets: in DocuWare Configuration and, like before, in DocuWare Administration.

The new file cabinet administration in DocuWare Configuration is designed to help you create file cabinets as quickly and simply as possible. Departmental managers should have the option of creating a file cabinet for a specific project, for instance, without the need for any in-depth administration knowledge. To make things simple, individual file cabinet components are predefined: There are up to 14 database fields available for each new file cabinet, including "Company", "Date", "Contact Person", or "Email." These fields can be combined for store and search dialogs, as well as result lists.

Access security is ensured by default profiles that are also predefined. The profiles can be allocated to individual users and roles and cover conventional use cases, including read, edit, and administration.
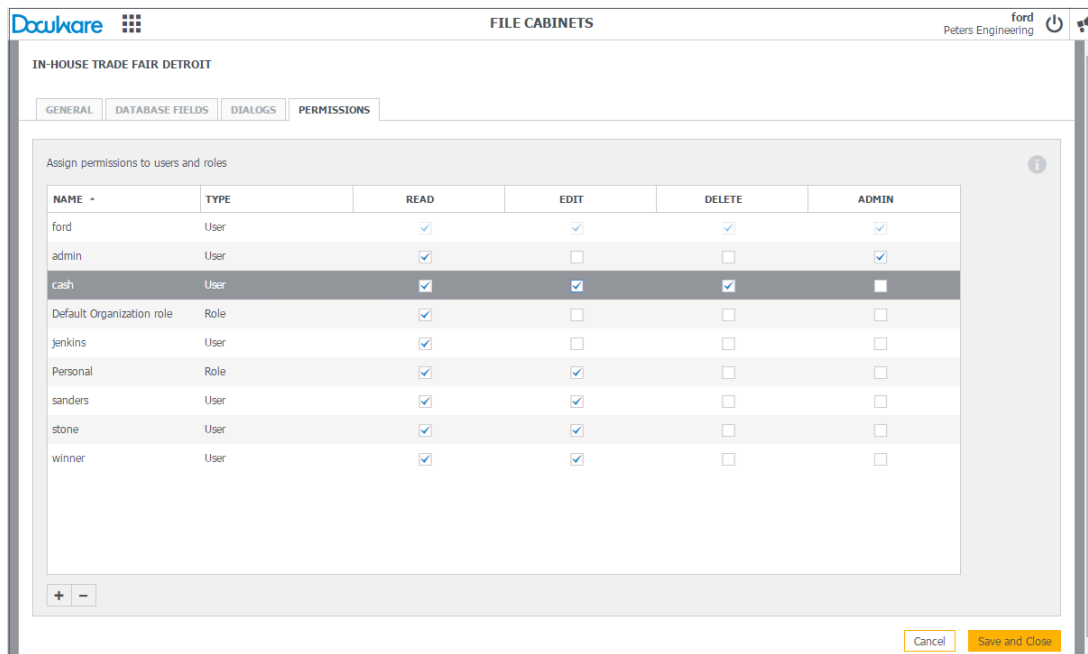
Predefined file cabinet components make creating file cabinets easier. Permissions, for example, are combined into four default profiles: "Read", "Edit", "Delete", and "Admin."

DocuWare Administration is designed, just as it was previously, for DocuWare specialists and it offers numerous additional setting options. Newly created file cabinets can be adjusted further, if necessary, in the configuration. This way, other fields can be created, file cabinets enabled for the Windows Explorer Client, or dialogs enabled for mobile clients.

➕ Benefits

- A wizard guides you through the most important settings for a file cabinet
- No in-depth knowledge of DocuWare Administration is needed
- Dialogs, fields and profiles are automatically created

⚙ How to call up the function

In DocuWare Configuration, start the new "File Cabinets" module in order to create file cabinets or to edit or delete existing file cabinets. The newly created file cabinets are available directly in the Web Client.
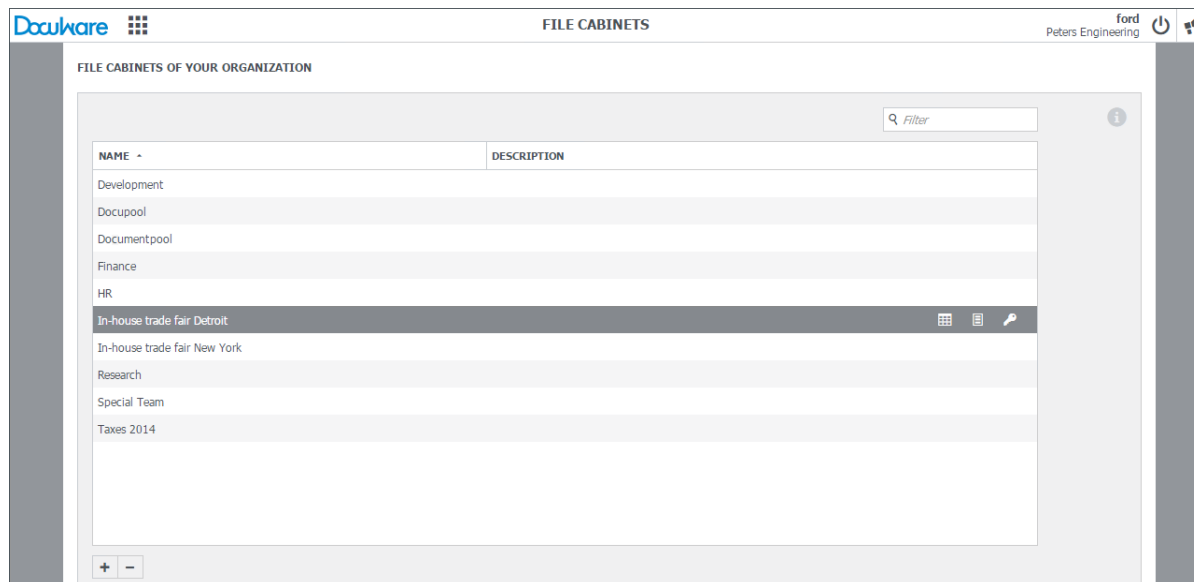
All file cabinets in your organization are clearly listed on the homepage of the new file cabinet administration.

6.1.4 If necessary, save individual window arrangement in the database, instead of locally

Component: Web Client

Individual values of the DocuWare user interface, such as window sizes and positions, can also be stored in the central database, if necessary, instead of locally. This is particularly important for users who work in a terminal server environment.

➕ Benefit

- When opening DocuWare, the windows are arranged just like the last time you worked with DocuWare, even for users in a terminal server environment

⚙ How to use the function

Please read the relevant FAQ article (https://www.docuware.com/support_faq/?solution_id=3737) about how to switch from saving values locally to the database.

6.2   Usability Improvements

6.2.1   More Convenience in Windows Explorer Client

Component: Windows Explorer Client

Thanks to numerous optimized functions, Windows Explorer Client can be even better embedded into the usual working environment under Windows. The overall performance of Windows Explorer Client has increased significantly.

Applications

- Folders and documents can be displayed quickly, even large file cabinets with numerous documents. The document view is promptly updated, including after changes.
- The "Open" command from the context menu loads documents like in Windows Explore for editing in the original program. The modified document is saved in DocuWare.
- The link to an archived document in DocuWare can be copied to any application like an ERP system or Microsoft Word. The *Copy link to clipboard* command is in the context menu of a document.

Benefits

- Better integration into applications like MS Word or an ERP system
- Improved performance saves time
- Operation like in Windows Explorer

6.2.2   Improved Keyboard Usability

Component: Web Client

The Web Client is optimized for keyboard use. This includes keyboard shortcuts for certain commands and general use of the Web Client with [Tab], [Enter], arrow keys etc.

Benefits

- Quick use of the Web Client using a keyboard, particularly for frequently used functions
- Easy to use for those who enjoy working with a keyboard

How to use DocuWare with a keyboard

You can find a list of keyboard commands in the Knowledge Center (http://help.docuware.com/en/#t62193).

6.2.3 Switching Between Touch and Mouse Mode

Component: Web Client

You can choose the mode you want to work in with DocuWare on devices that can be used either with a mouse or in touch mode.

➕ **Benefits**

- Choosing your preferred DocuWare operating mode
- Choosing your operating mode depending on the situation

⚙ **Where to select the function**

- Web Client main menu > 🔖 Mouse mode or 👆 Touch mode

6.2.4 Index Dialog Always Suitable for Document on Display

Component: Web Client

When the index dialog is open, the entries are automatically updated and suitable for the document on display.

➕ **Benefit**

- Index entries always suitable for the document in view

⚙ **How to use the function**

You have a list/result list and you display one of the documents in the Viewer. In addition, select the menu command in the (result) list for the document 🔖 *Show index entries* and open the index dialog. Now in the Viewer navigate ‹ ≋ 3/6 › through the documents in the (result) list. The index entries associated with the displayed document are always displayed in the index dialog.

6.2.5 Automatic Updating After Document Editing

Component: Web Client and Viewer

After a document has been edited, both the document display in the Viewer and the entry in the result list are automatically updated.

➕ **Benefits**

- No more manual updating
- Display always up-to-date

6.2.6 Workflow Stamp Distinguishable from Other Stamps

Component: Viewer

The stamps used with the Workflow Manager look different from the "normal" stamps in DocuWare Viewer.

⊕ Benefits

- Clearer user interface
- Faster selection of appropriate stamp

⚙ How to use the function

No special settings are needed.
Workflow stamps are instantly recognizable by this symbol 📍.
They are also visually separated by a line from the other stamps.

6.2.7 Rearranging Task Lists

Component: Web Client

You can rearrange task lists with drag and drop. For example, you can make sure that the most important task list always appears on the first tab.
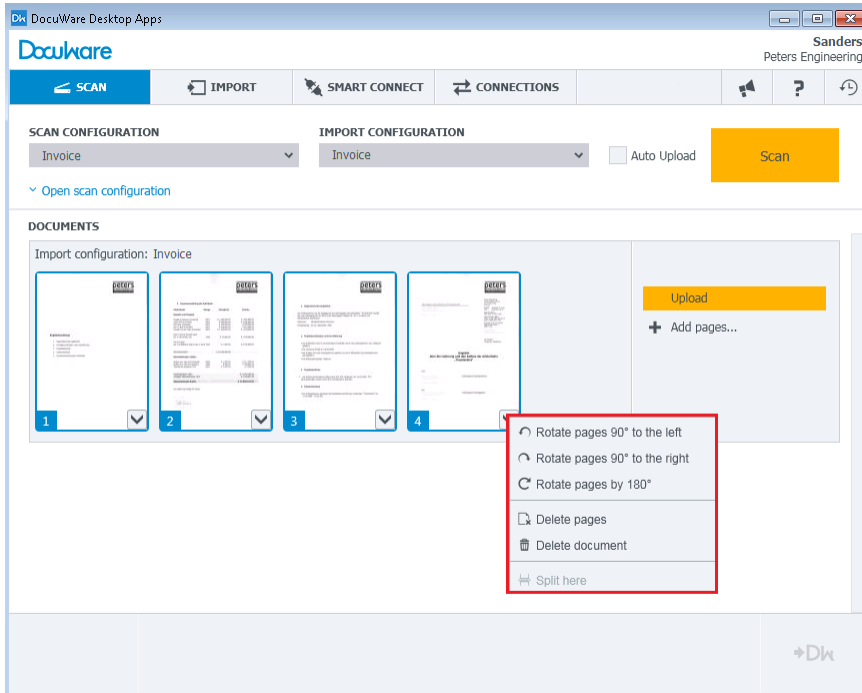
6.2.8 Scan Page Menu Clearer

Component: DocuWare Scan App

If you scan documents, there is now an even better structured context menu available in the Scan App – for both individual pages and for several selected pages together.

⊕ Benefits

- Rotate and delete pages faster
- Added convenience

⚙ **How to use the function**

You can now rotate or delete several selected pages together at the first level of the context menu. To select several pages, hold down CTRL and click on the pages you want to select.

6.2.9   Submenu shows several desktop connections

Component: DocuWare Desktop Apps

If you have several active desktop connections, they will be displayed in the context menu of DocuWare Desktop Apps with a *Connections* submenu.
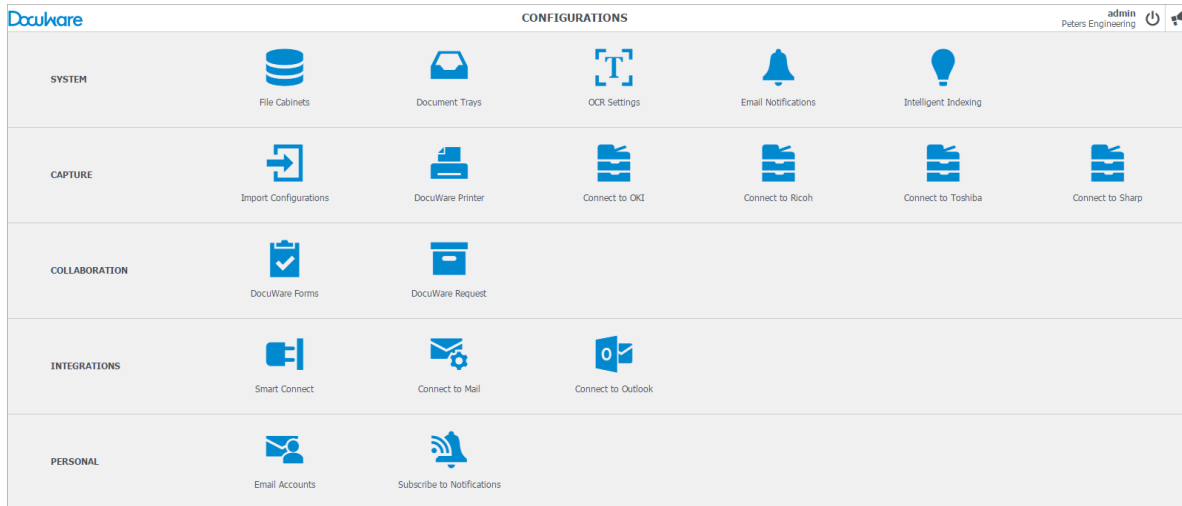
⚙ **How to use the function**
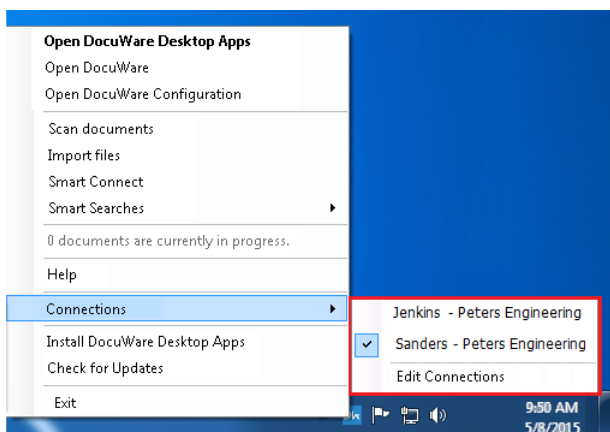
6.2.10 Clearer DocuWare Configuration Homepage

Component: DocuWare Configuration

DocuWare Configuration has been redesigned. The individual modules for which configuration can be created are organized more clearly and grouped thematically.

A new look and feel for DocuWare Configuration

Benefit

- Clearer user interface, easier to use

How to call up DocuWare Configuration

As usual, you open DocuWare Configuration through the main menu in Web Client > *Configurations*.

6.2.11 Workflow Designer with new Icon

Workflow Designer is displayed with this icon .

6.2.12 Variables and Validations in the New Design

Component: Workflow Manager

In the Workflow Designer, the variables and validations in the new design are presented more clearly.

⚙ Where to select the function
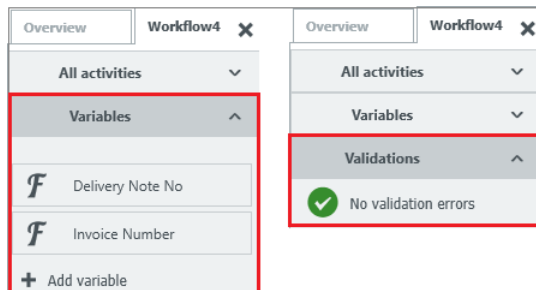
You have a clear view of both variables and validations in which you are shown a confirmation or error message together with a reason.

6.2.13 Service Control with New Icon

Service Control is displayed with the new icon .

6.2.14 All Configuration Information at a Glance

Component: DocuWare Request

Information about import and export configurations have been enhanced and reorganized. All important information is now visible at a glance.

Information about an export configuration is clearly organized in "Details", "Status", and "Completed DocuWare Request Jobs."

6.2.15 Export and Import Are Automatically Continued

Component: DocuWare Request

A DocuWare Request job is always handled fully automatically. Manual intervention is no longer necessary, even after server downtime. Should an interruption occur, DocuWare Request remembers the status and can continue with the import or export later at the same place.

⊕ Benefit

▪ Automatic job handling reduces your workload even more.

7 Basic Information About DocuWare Version 6.8

DocuWare Version 6.8 is the first version without Windows Client and associated modules. It paves the way for new possibilities in the further development of the DocuWare System. The following chapters provide you with some of the most important pieces of information.

7.1 Licenses

For the DocuWare add-on modules set up on Windows Client (CONTENT-FOLDER, LINK, ACTIVE IMPORT, RECOGNITION, and INTERNET-SERVER), sidegrades are available for relevant up-to-date modules. These sidegrades are free in the case of an existing maintenance and support contract. Please contact your DocuWare Sales Partner to exchange licenses.

DocuWare Professional Services will also be pleased to help you in your switch to the new technology with Web Client and offers an appropriate package (http://pub.docuware.com/en/docuware-sidegrade-package), including system analysis.

7.2 Programming Interfaces

The GAPI interface, Web Services and the DocuWare Toolkit are replaced by the modern REST interface "DocuWare Platform Service" and URL integration. This means that applications based on the old interfaces need to be converted to the Platform Services or URL integration for use with DocuWare as of Version 6.8. Your DocuWare Partner or DocuWare Professional Services will be pleased to help you if necessary.
More details about the new interfaces can be found under Product Info (http://pub.docuware.com/en/software-development-kit).

7.3 Installation Package

As of Version 6.8, the installation package no longer includes the following products:

- Windows Client
- TIFFMAKER
- CONTENT FOLDER
- ACTIVE IMPORT
- RECOGNITION
- COLD/READ (documents can continue to be displayed, but no new ones are stored)
- Upload Service
- Connect to Toshiba V1
- GAPI
- JAPI
- TOOLKIT

7.4 Changes in DocuWare

The following things have generally changed in DocuWare Version 6.8:

- **IndexID**:
  Index fields are no longer identified by the IndexID, but by their unique column name in the database. This may be different from the name displayed in a store dialog, for instance. You can find the unique column name in the database in DocuWare Administration in the details for the relevant index field.

- **Viewers and Editors:**
  The Viewer is generally used in the Web Client to display documents in DocuWare. The default program stored on the computer is always used for editing documents.

- **Dialog assignments:**
  For simpler rights management, dialogs are now assigned to users and roles directly and no longer to file cabinet profiles. Existing dialog assignments are copied automatically to the new system during the update process.

- **Document import via DocuWare MFP connectors:**
  If you use a multifunction printer to scan documents for storage in DocuWare and where there is a DocuWare MFP connector, the documents are uploaded via DocuWare Import and no longer with the Upload Service. The Upload Service, as described above, is no longer part of the software package.

Index assignment by stamp

When creating stamps in DocuWare Administration, there was the option of using IndexIDs to select index fields intended to be filled and/or changed by setting the stamp. From Version 6.8, assignment takes place via the field name in the database, also called "column name." When updating to Version 6.8, changes are therefore made to the existing stamps:

- If a stamp is assigned to a file cabinet, the IndexID field assignment is automatically adapted to the column name during the update process. This is possible because within a file cabinet the relationship between IndexID and column name is unique.

- If a stamp is not assigned to any file cabinet, field assignments cannot be automatically adjusted. For this reason, assign stamps to a file cabinet before the update wherever possible. If you want to continue using a stamp for several file cabinets, please manually adjust the field assignments after the update. Otherwise the stamp entries will not be copied to the index fields.