DocuWare

What’s new in DocuWare Version 7.2

All news in combination with application scenarios, advantages for users and configuration hints

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DocuWare

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DocuWare Version 7.2

The current DocuWare version is all about user-friendliness. Working with documents and configuring DocuWare have both become more convenient. Here are a few examples.

The Viewer can display e-invoices in XML format in a way that people can read, just like PDF invoices. The user-friendly presentation makes invoice processing simpler and more transparent.

The highlight for anyone who configures or administrates DocuWare themselves is the new stamp configuration. Instead of using the locally installed DocuWare Administration, you can now also create stamps in the browser in DocuWare Configuration – and it's much easier and more intuitive than before. The configurations for DocuWare Request and Connect to Mail have also been optimized especially with regards to user-friendliness.

And in Workflow Designer there are several innovations that improve the control and processing of tasks within the processes.

We hope you enjoy working with your documents and all of the processes.

1 More Convenience when Working with DocuWare

1.1 Processing E-invoices in XML Format

Components: Document Processing (DocuWare Import)

DocuWare imports and processes invoices in XML format and takes the data from the XML file as index data.

DocuWare displays the invoice in the Viewer in a reader-friendly version, similar to a PDF invoice, so that the user does not have to deal with the encoded XML representation of the invoice. Without such preparation, the XML data would only be displayed with an editor as code.

Application

E-invoices of the following standards are supported:

- XRechnung (German standard): XML format
  For e-invoices, the German standard XRechnung is now also supported, which applies to invoice exchanges with German federal authorities in accordance with the German e-invoice law and EU Directive 2014/55/EU.
- ZUGFeRD 2.0 (German standard): PDF with embedded XML metadata
  It is also possible to process e-invoices with the German standard ZUGFeRD 2.0, which is the new version of the existing format. ZUGFeRD 2.0 embeds the XML invoice data in a PDF, that makes the XML data readable to the human eye.
- Factur-X (French standard)
  This is the French version of the ZUGFeRD 2.0 standard with the same content.

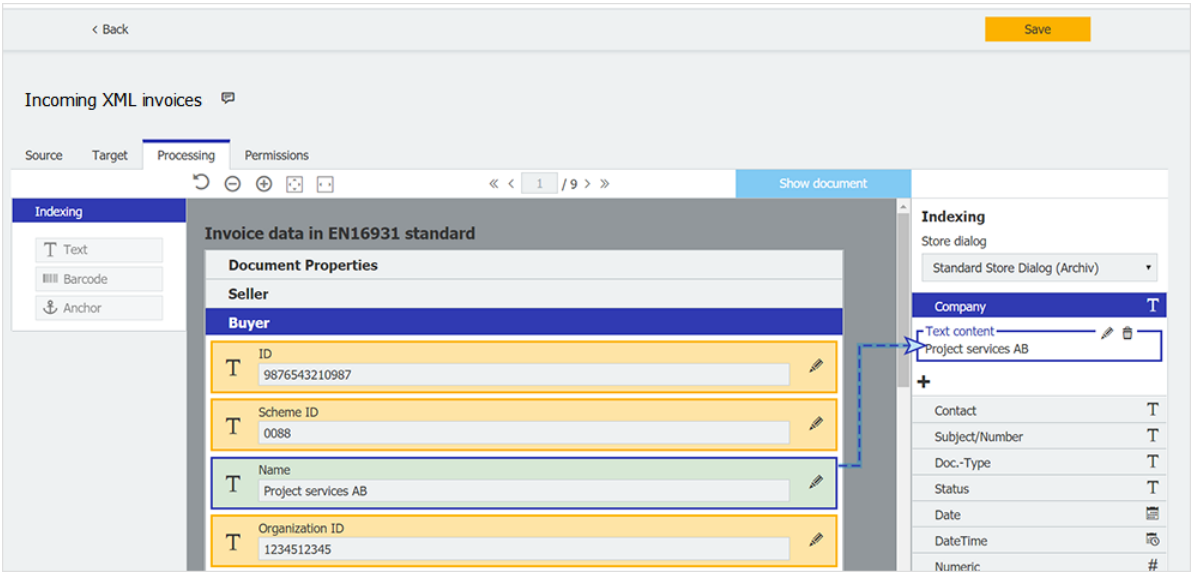
Background: For the exchange of e-invoices in the European Union, standard EN 16931 regulates which contents an e-invoice must include and which data model is permissible for electronic invoicing. According to this standard, e-invoicing documents can be sent as structured data, for example as XML files or as PDF files with embedded XML data. DocuWare supports both XML data models provided for in the standard, i.e. the syntaxes UBL (Universal Business Language) and CII (UN/CEFACT/Cross Industry Invoice).

- FatturaPA (Italian standard)
  In addition, the Italian standard FatturaPA, which does not comply with the European standard EN16931, is supported.

Benefits

- Greater flexibility in receiving and processing e-invoices
- Reader-friendly presentation of invoices in pure XML format

Here's how



The XML invoice data is displayed in configuration of document processing similar to PDF invoices.

1.2 Displaying COLD and DocuWare 4 Documents

Component: Viewer

Archived documents with the following earlier document formats can now be displayed again in the Viewer:

- Documents in COLD format (Computer Output on Laserdisk), both from DocuWare 4 and DocuWare 5 file cabinets
- Documents in DocuWare 4 format (TIFF format with index information in the header file)

1.3 Easier Working with Table Fields

Component: Web Client

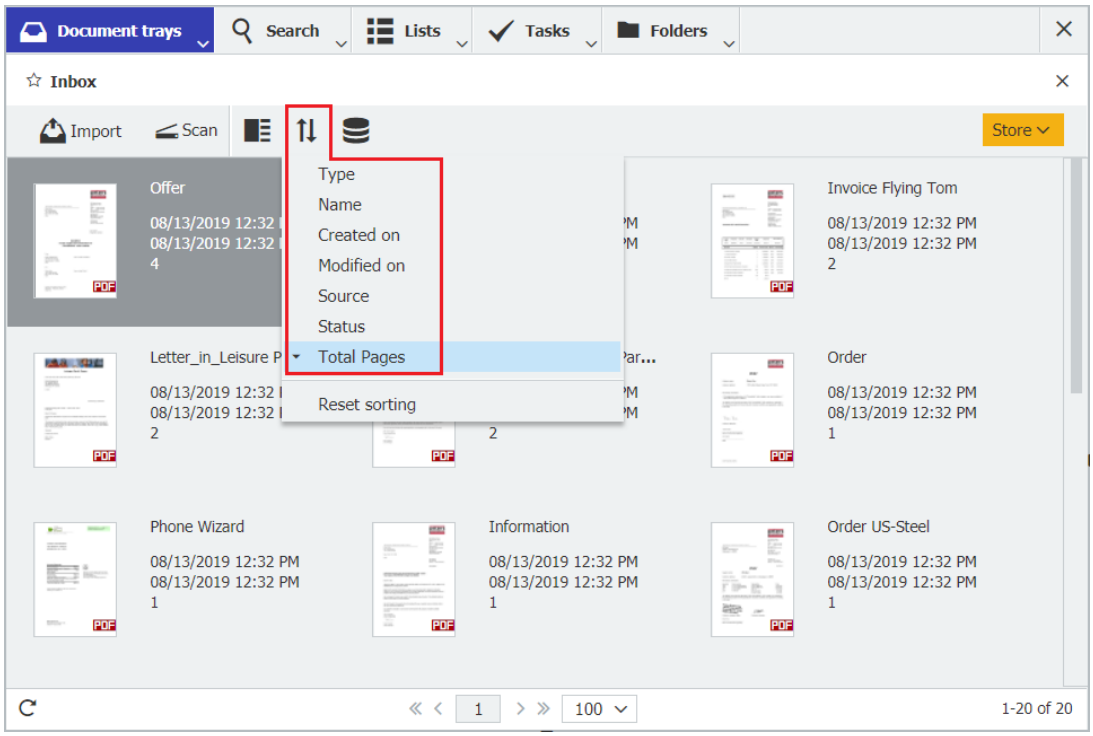
Table fields were introduced in the previous DocuWare version. Their handling in the Web Client is now optimized:

- For table fields, you see the number of rows in the result list and can preview them in a pop-up window.
- For decimal fields, the sum of a column is automatically calculated and displayed, even in workflow dialogs by default at the bottom of the page, so scrolling is no longer necessary.
- The title line of the table is fixed and therefore always visible when scrolling down.

1.4 Sorting by Page Number in the Document Tray

Component: Web Client

In the document tray there is an additional option for sorting by page number.
This always refers to the entire document, in the case of stapled or clipped documents to the sum of the individual document parts.



New option for document sorting in document tray: by page number

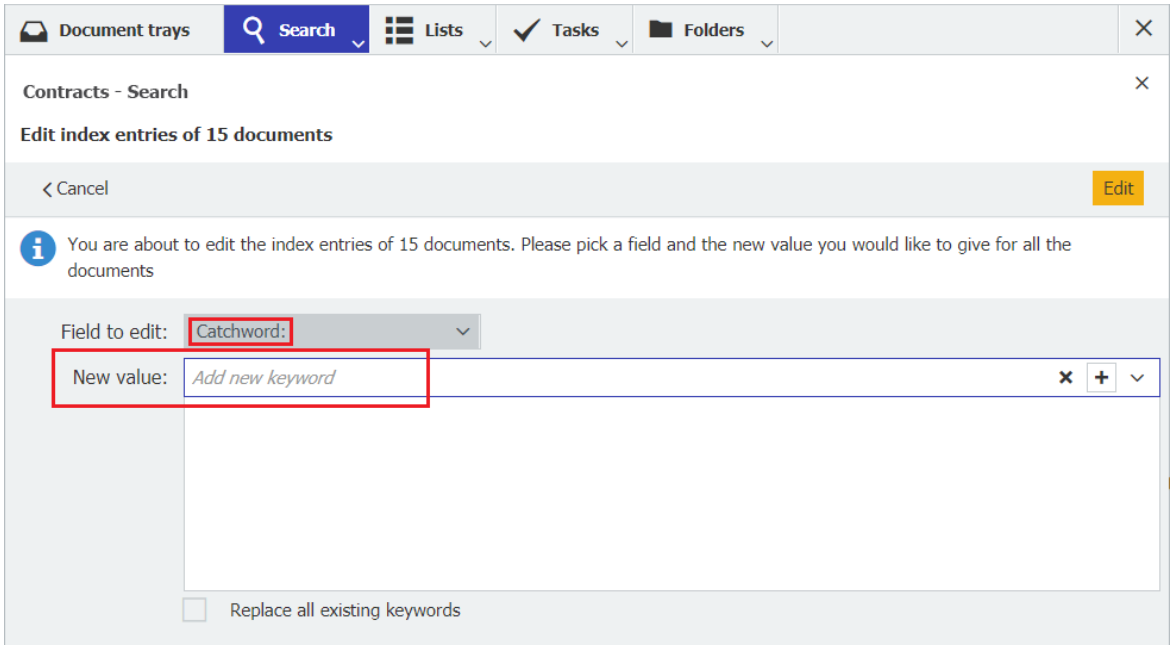
1.5 Keyword Field: Add New Entry

Component: Web Client

In a keyword field, you can enter several keywords as index terms for each document when archiving.
You can now use the result list to add more keywords to several documents at once.

Here's how

Select several documents in the result list and select the menu command "Change several index entries." In the new window, enter the additional keyword in the "New value" field. If the new entry is not to be added, but replaces the existing entries, activate the option "Replace all existing keywords."



2 More Possibilities in Workflow Designer

2.1 Workflow Activity "Wait for Event"

Component: Workflow Designer

With the new activity "Wait for event," you can make a workflow wait for documents belonging to an activity to arrive or be processed. These documents can be stored in any file cabinet. The next editor only receives their tasks once this has happened.

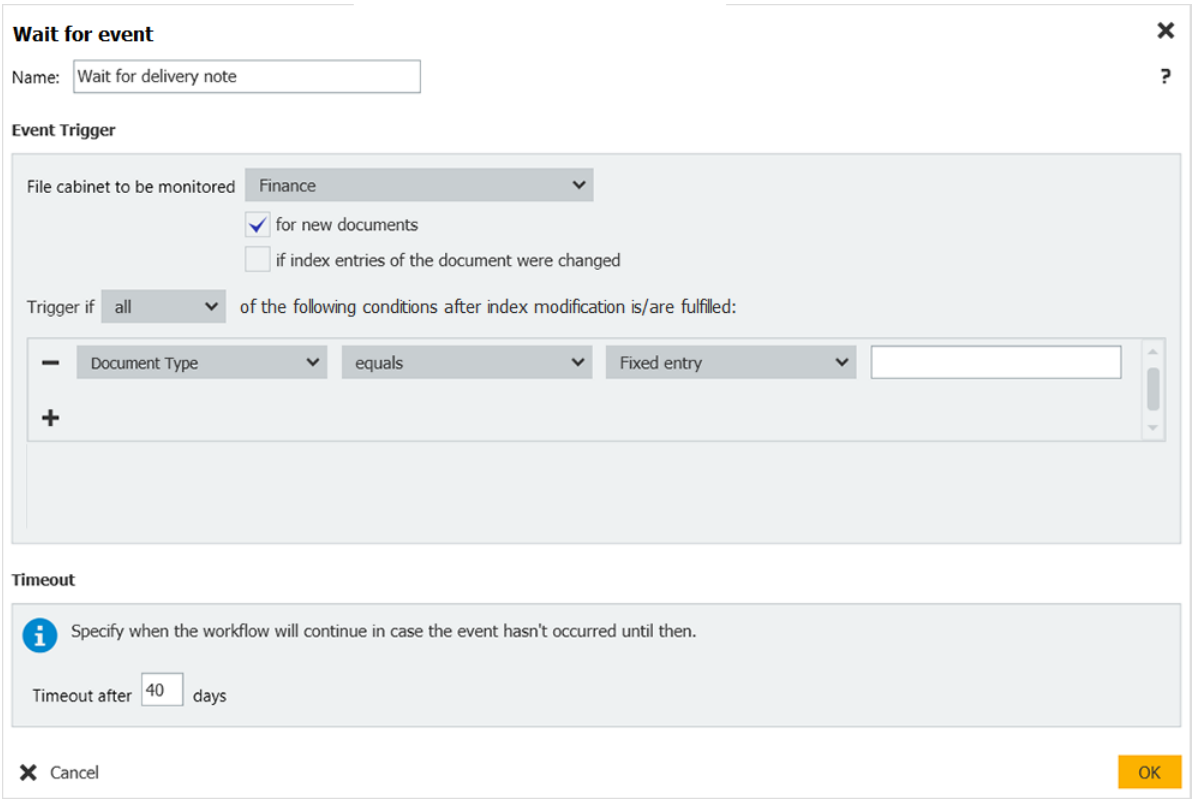
Application

You configure the system so that the workflow for incoming invoices does not continue until the delivery note belonging to the invoice has been stored.

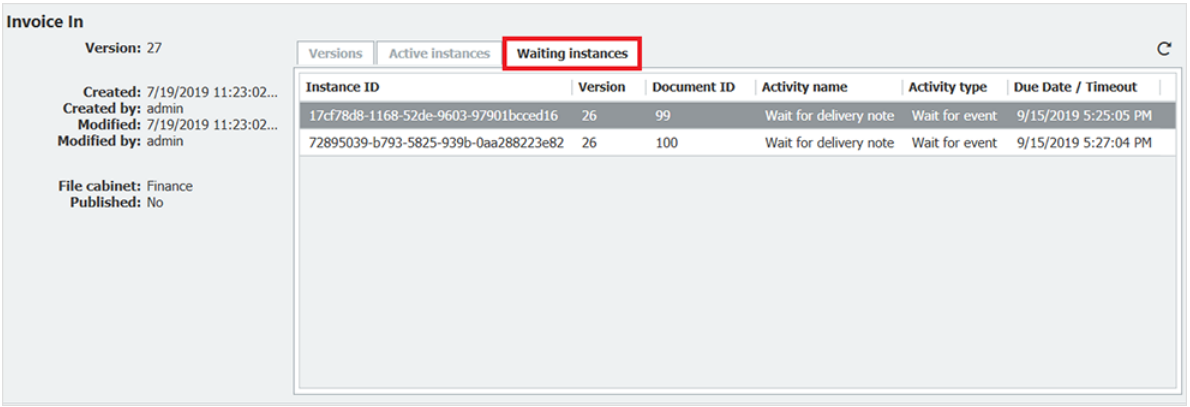
Benefit

- Only tasks that can be completed are displayed to employees

Here's how



You select the file cabinet and define the conditions in the same way as in the Start activity. Then set how long you want to wait for the event.



As a designer, you can see the waiting instances on a new tab in the overview. You also have the option of continuing to run the instance in question using the context menu.

2.2 Workflow Activity "Time Delay"

Component: Workflow Designer

With the new activity "Time delay" you set a fixed waiting time for a workflow instance.

Application

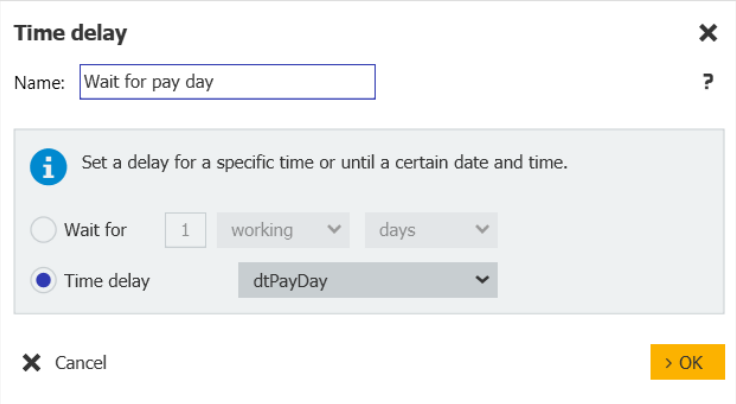
- Pending box: Insert a field with which your employees can set themselves workflow tasks as a pending box
- Time loop: If you execute a Web service for a check, you can trigger its repetition on the next day, for example, if the result is negative
- Technical necessity: Delay a workflow, for example, to wait for a response from an external system

Benefit

- More flexibility for users with current workflows

Here's how

You specify the required number of days, hours or minutes either using the dialog or using a variable of the date/time type. The maximum waiting time is 365 days.

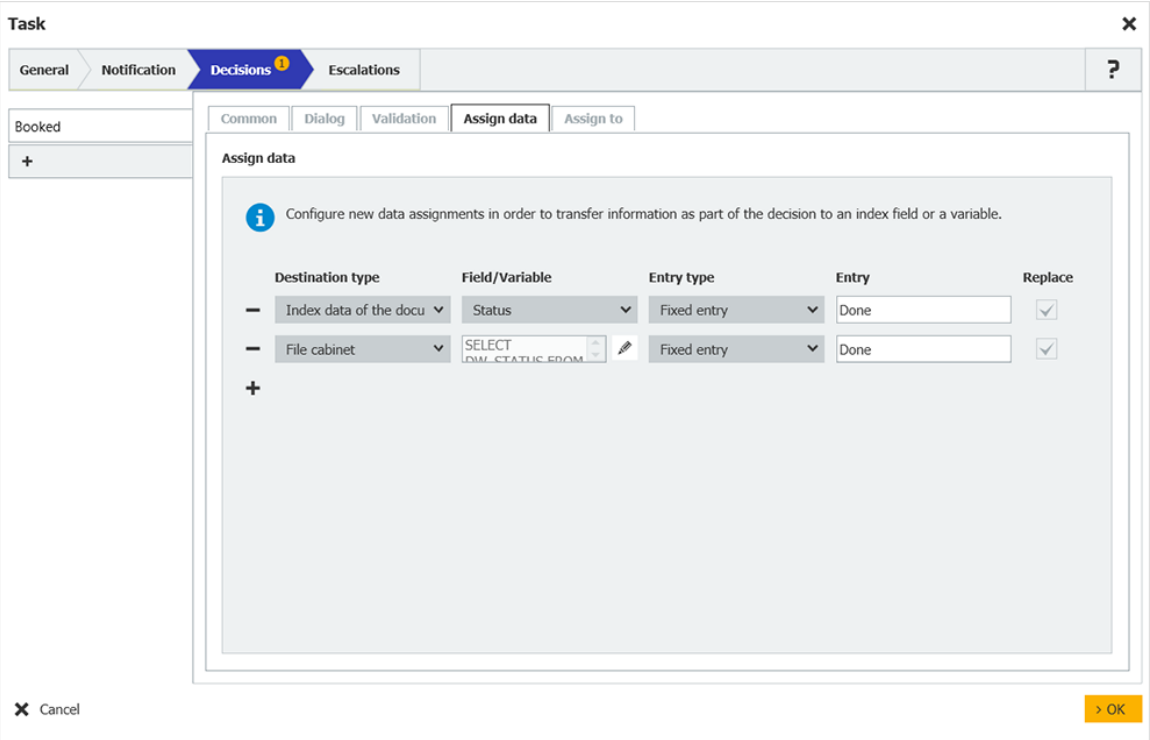


2.3 Updating Metadata of Other Documents

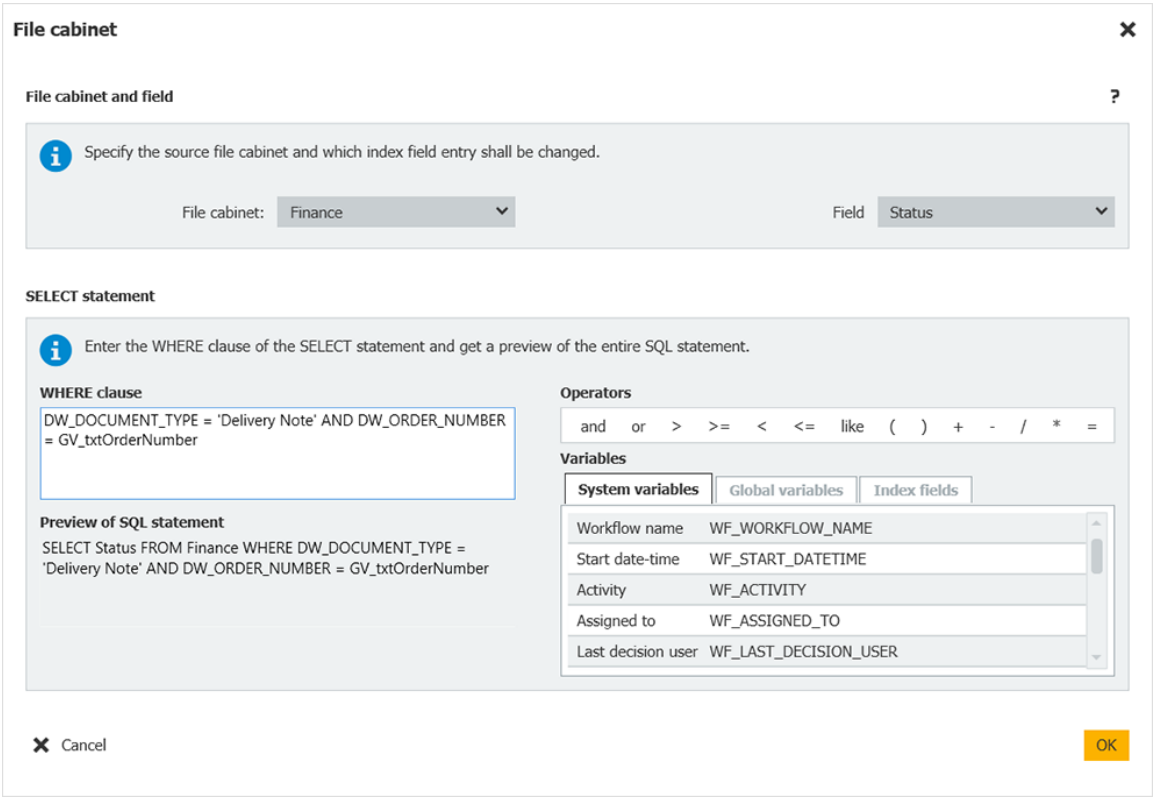
Component: Workflow Designer

Within a workflow, you can update the metadata of any document in one of your DocuWare file cabinets, not just the metadata of the current workflow document.

Here's how



Use the new type "File cabinet" for a data assignment.

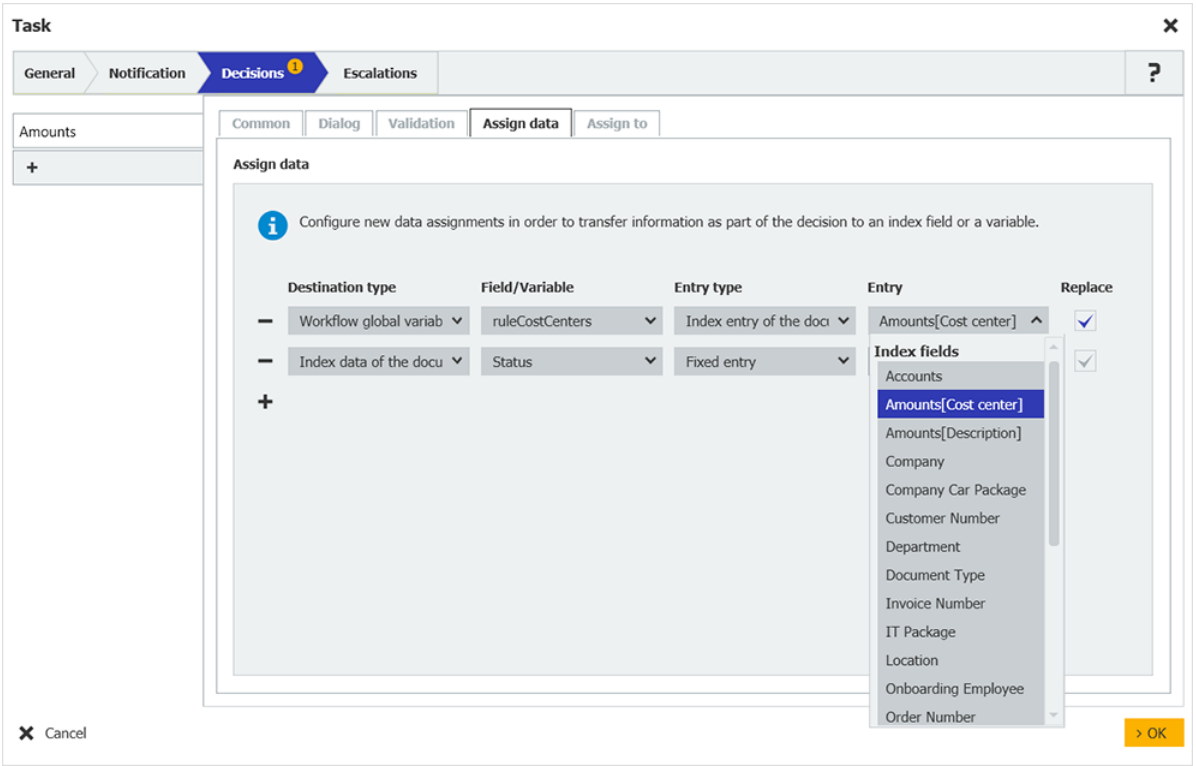


To determine the document for which the metadata is to be updated, configure a WHERE clause. This works the same way as if data from a file cabinet is to be retrieved as a data source. You can update a document and a field for each data assignment.

2.4 Table Field Columns for Workflow Data Assignment

Component: Workflow Designer

The columns of a table field are now also offered for the data assignment for the sources (entry type) "File cabinet" and "Index entry of the document." Only text columns can be assigned. The target must be a list variable or a keyword field.



Application

Save all entered cost centers and use them for further assignment in the workflow.

2.5 Filtering Selection Lists for Workflow Dialogs

Components: Workflow Designer, Configuration: Indexing aids > Select lists

You can filter the select lists for workflow dialog boxes so that only the relevant entries for selection are displayed to employees for their tasks.

Application

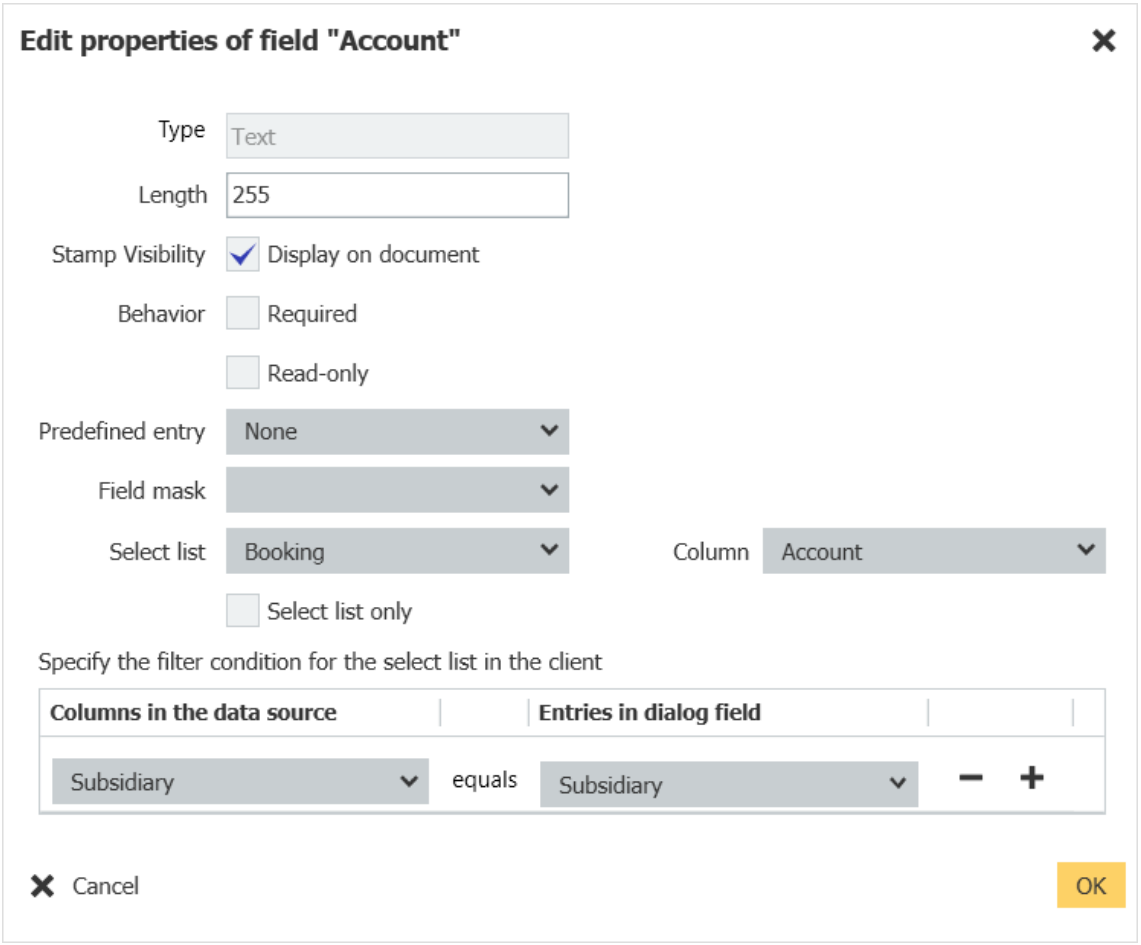
In the workflow for incoming invoices, you filter the cost centers according to branch offices.

Here's how

To filter a select list in the Workflow Designer, you need a multi-column select list http://help.docuware.com/en/#t62404. It contains several columns, with entries to be used to fill your workflow dialog boxes. Linking a multi-column select list to workflow dialog boxes works in a similar way to linking fields in a file cabinet's storage or search dialog box:

1. In DocuWare Configuration, you can upload the multi-column select list in the Indexing help > Select lists area or import it via a file or database connection.

2. In Workflow Designer, you assign the columns of the multi-column select list to the workflow dialog boxes in the relevant task:
Workflow Designer > Task/Parallel task > Decision > Dialog > Field > Field properties > Select multi-column select list > Select column > Assign for filtering



In the properties of a workflow dialog box, assign a column of the multi-column select list to the workflow as a select list. You can use multi-column select lists for all field types except table fields.

2.6 Limiting Displayed Fields for Workflow Stamps

Component: Workflow Designer

You can specify directly in the workflow configuration which fields from your workflow dialog are to be transferred to a stamp and which are not. This means that only the relevant information appears on the document.

2.7 Current Task in Workflow History

Component: Workflow Manager

The current task is displayed in the workflow history. Other users who access the document and view the history can see which step is currently being executed in the workflow.

2.8 Further Improvements for Workflow Designer

Component: Workflow Designer

Various changes further facilitate the configuration of workflows:

- For each field, link, and description text, all properties are summarized in a separate dialog for editing. You open the dialog via the Edit button, for example for a field.
- You can now see the execution time of an activity next to the date in the workflow history table and no longer in the details of the history entry.
- When you create a new variable or workflow field with a decimal value, the default value for the decimal places is now 2 (previously 0).
- When processing and converting data with VBA expressions, you can now set the formatting based on a regional format.

3 News from the Configuration Area

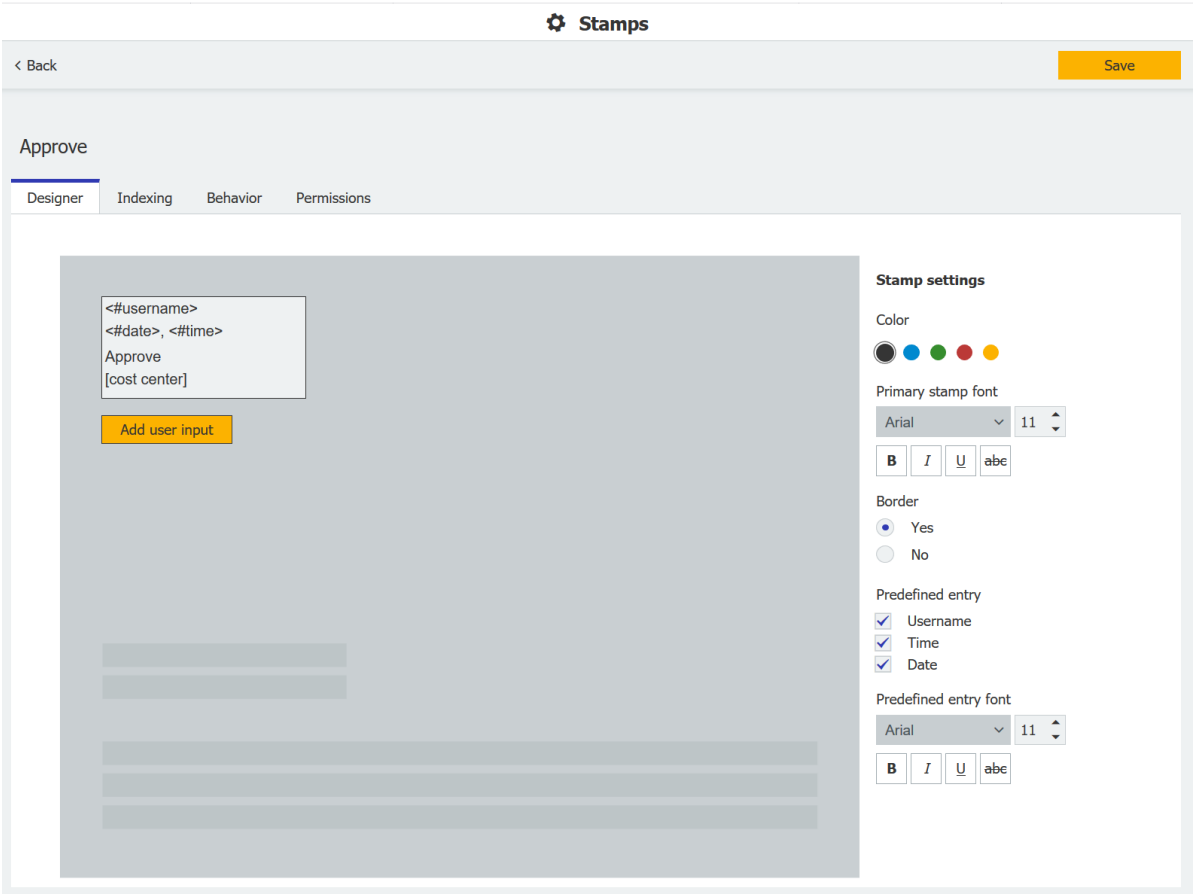
3.1 Stamps Now in DocuWare Configuration

Component: Stamps

A stamp accelerates the processing of documents. Use a stamp to place information on a document without changing the content. Depending on the configuration, the stamp can change or add index entries and thus forward documents in the office process.

Stamp configuration is now integrated into DocuWare Configuration. You no longer need DocuWare Administration. There is a new preview that shows the stamp entries during the configuration.

All existing stamps are transferred when updating to version 7.2. Stamps that have been set up can still be used in the DocuWare Client.



A preview shows the stamp entries during setup.

Application

- A head of department stamps an invoice as "Approved." At the same time as the stamp is affixed, the entry in the "Status" index field is changed from "Release required" to "Approved," and the invoice is then transferred to the finance department's list for payment.

Benefits

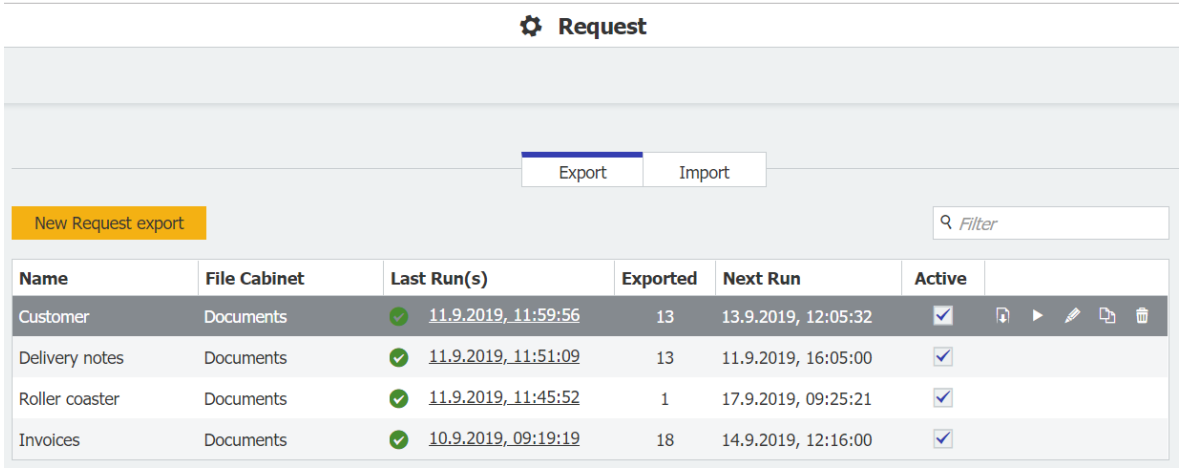
- Simple: Set up stamps directly in DocuWare Configuration
- Convenient: A preview of the stamp is shown during configuring

3.2 New Interface for Request Configuration

Component: DocuWare Request

The design of DocuWare Request has been completely revised and adapted to the other modules in DocuWare Configuration for a uniform appearance.

The scope of functions and use have remained the same. To compile documents in an independent file cabinet, use the menu command of the result list or start the request job via the configuration. With the integrated browser, external service providers or customers can search and view documents – without DocuWare or other additional software.



Application

- In the case of a financial audit, you compile all archived, relevant documents of a fiscal year and transfer them to the auditor as an independent file cabinet on a USB stick.

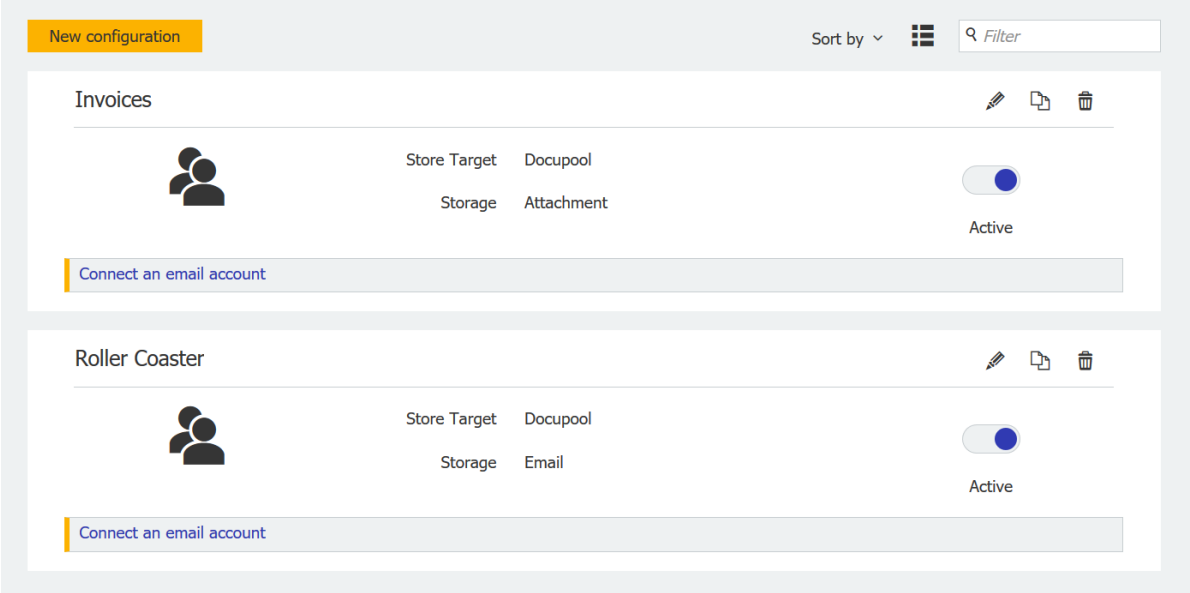
3.3 New Configuration Module for Email Import

Component: Emails general

The module *Emails general* for configuring the import of emails has been completely revised. The module was adapted to the design of the other DocuWare configurators and the user-friendliness was increased.
The range of functions is unchanged: You configure the email import from an Exchange or IMAP server and specify the destination in DocuWare and the indexing, among other things.

Existing configurations will be migrated so you can use them in DocuWare Version 7.2. You do not have to configure them again after the update. The only difference is that you now assign your email accounts directly to the storage configuration. The "Email account" module in the "Personal" section of the DocuWare configuration is no longer required.

As before, the user needs the permission "Use" so that the storage configuration is shown to them and they can connect an email account with this configuration. The use permission can be granted by the administrator in the storage configuration.



Application

- An invoice received by email is stored in the file cabinet and triggers the release process there. This allows you to conveniently adhere to the discount period.

3.4 Displaying Letterhead on Document

Component: DocuWare Configuration > Document Processing

After adding a letterhead, you will see it directly on your example document.

3.5 New Operators for Separation and Identification

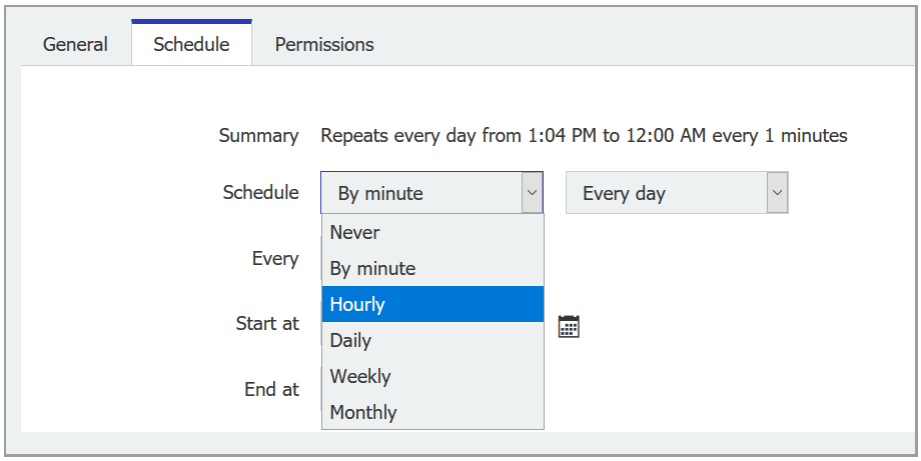
Component: Document Processing

There are the new operators "does not contain" and "barcode contains x". With "Barcode contains x", for example, you can specify that a configuration is only to be used if the barcode contains exactly 6 characters.

3.6 More Options for Scheduling Job Configurations

Components: Autoindex, Synchronization, Deletion Policies, Transfer, Request

When scheduling a job configuration, you can now select the options "Hourly" and "By minute" directly from the list. Previously, both options were combined under "Daily." What is new is that you can even start a job to the minute (hh:mm), for example at 02:01.



3.7 Using Date Field as match code

Component: Autoindex

The field type "Date" is now available for a match code in Autoindex. One or more match codes can be used to locate matching data records in the source and DocuWare.

Application

- If no barcode exists for invoices, you can still use the document type, company, and date to limit the documents that are to be enriched or processed.

Benefit

- Get exactly the documents you are looking for.

Here's how

You define the match code in the tab "Index assignment" of Autoindex. Select a field of type "Date" from the list. The field type "DateTime" is not available as match code.

4 Technical Information

4.1 Changed System Requirements

Compared to DocuWare Version 7.1, here are the following changes to the system requirements:

- Windows 8 is no longer supported as an operating system, neither for clients nor for servers
- Exchange Server 2007 is no longer supported for email archiving (both Connect to Mail and Connect to Outlook)
- .NET 4.8 will be installed, if not already installed

As always, the complete system requirements can be found in the Knowledge Center.

4.2 Update to Version 7.2

DocuWare Cloud

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

DocuWare as an on-premises system

To update, at a minimum you need DocuWare version 7.
Meaning you would have to update to version 7 first and then to version 7.2.

To implement the update, please contact your authorized DocuWare partner. This is especially recommended if you first need the major technology update to version 7. Please also check the extent to which changes made with DocuWare Version 7.2 are relevant to your system.