

What's new in DocuWare version 7.5

Preview version exclusively for DocuWare Partners

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1 Integration into third-party applications – the main feature of the version

Organizations rely on their core business applications as a data source when it comes to the performance, health, and analysis of their business. These applications – from the finance, human resources, legal, sales, marketing and other departments– need to be in sync with your document management system to ensure that the information is accurate, contextually useful, and reliably discoverable.

DocuWare has long offered a wide range of integration options to connect systems and processes putting an end to manual data entry, frustrating searches, duplicate controls, and incomplete records.

DocuWare version 7.5 contains many new powerful features that make it even easier to connect to third-party applications. This applies to both on-premises systems and DocuWare Cloud.

1.1 File cabinet notifications with webhooks

Component: DocuWare Configuration > Webhooks

Set up notifications to be sent automatically when documents are newly stored in a file cabinet or associated index entries are modified. Other applications in the company can react to this, synchronize their data stock or – subject to the appropriate configuration – trigger actions and workflows.

The notifications are based on webhooks. DocuWare sends the news from the file cabinet to a URL in the form of a request. The third-party application monitors this request and receives the message.



Applications

- DocuWare regularly notifies the financial accounting system as soon as an invoice has been checked and the document status changes to "Approved." The financial accounting system synchronizes the document status and forwards the invoice for payment.
- For a project, a new presentation is stored in the file cabinet and a notification is sent immediately to the shared Microsoft Teams channel so that all relevant employees are informed.



Benefits

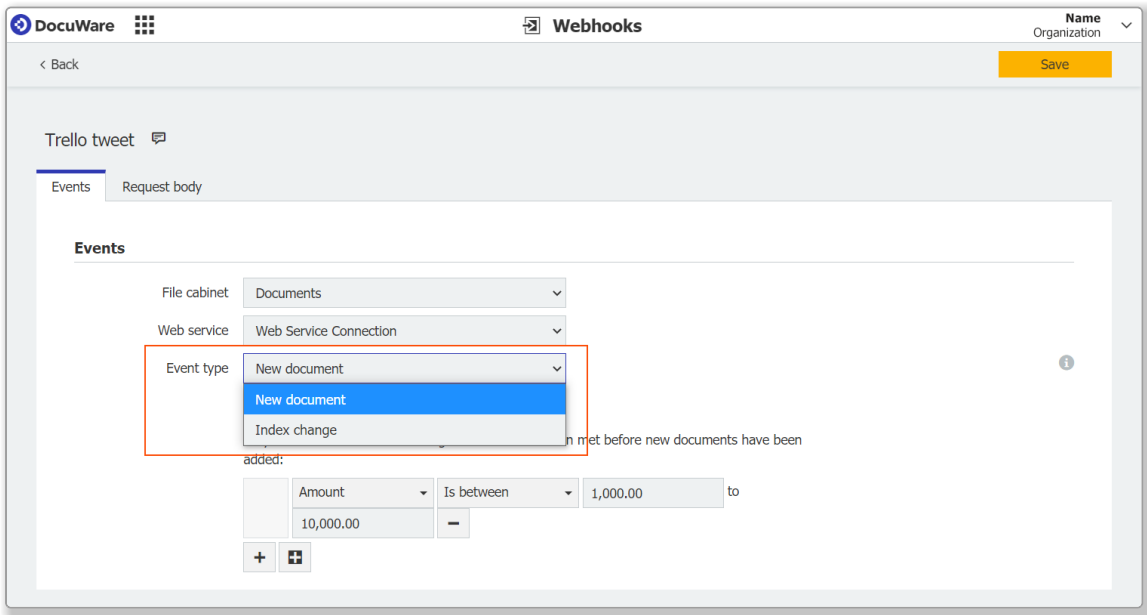
- Company applications are easily notified of changes to the database.
- No polling is required: DocuWare actively delivers the information to the other applications in the company.

Here's how

First create a *REST* type web service under *DocuWare Configuration > Integrations*. Here you enter the URL through which DocuWare and the receiving application communicate with each other.

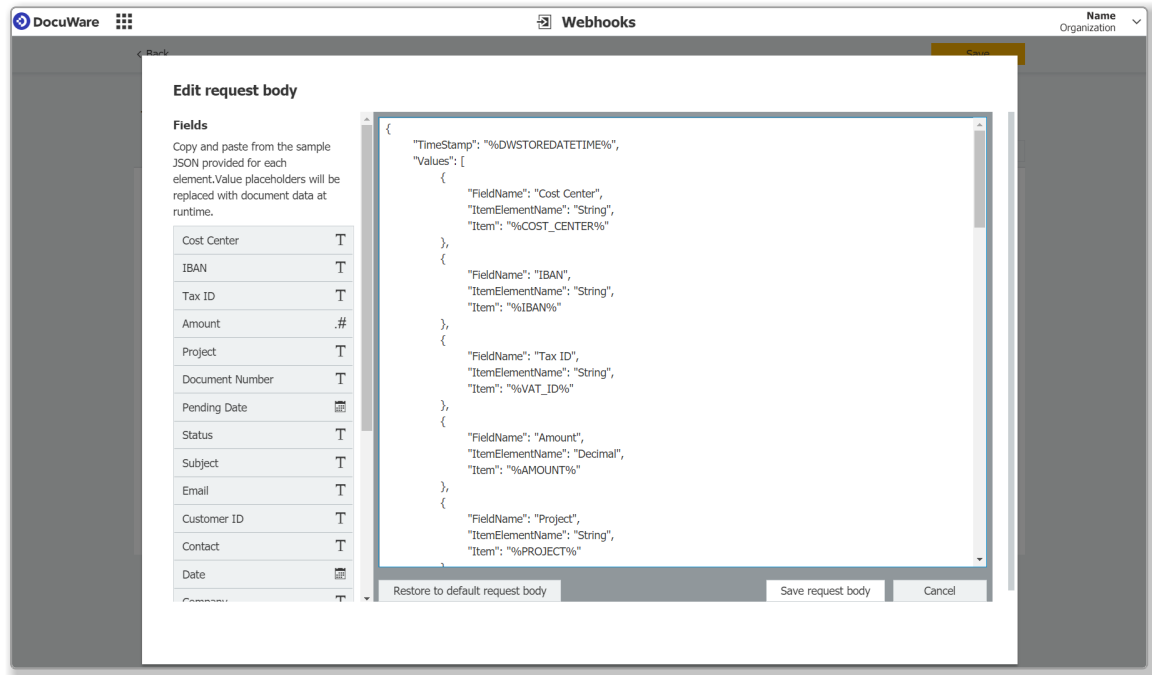
Then switch to the new *Webhooks* section in DocuWare Configuration and set up the notification in two steps.

1. Specify in the *Events* tab which file cabinet and which documents are to be monitored. Also select the web service with the URL here.



There are two triggers for a file cabinet notification: the filing of a new document or the index data modification of an already filed document.

2. You can freely configure the message text in JSON under *Requests*. By default, the index data and index fields are inserted for the documents concerned.



1.2 In the workflow: Integrate REST web service with optimized interface

Component: Workflow Designer

You can include REST web services and webhooks in your workflows in addition to SOAP.

The *Web services* activity in Workflow Designer provides you with a new assisted structure with a sequence of steps to set up the web service call. The configuration options for SOAP remain the same as before, but they are also displayed in the optimized interface.



Applications

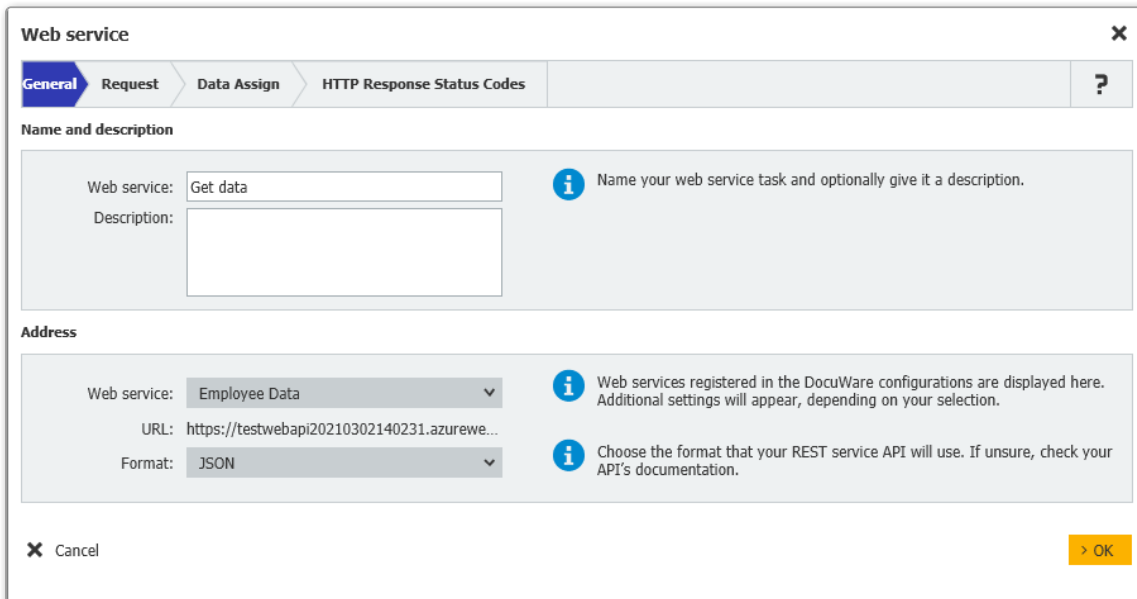
- Connect your financial accounting system or CRM to DocuWare via REST.
- Exchange data between systems automatically.
- In your workflows, you can use REST web services to create, update, or delete information in another application.
- Conversely, you can use data from other programs in your workflows.



Benefits

- Greater flexibility in terms of integration, especially from other cloud applications
- REST as a future-proof standard
- Easier handling of REST compared to SOAP


Here's how



Web service [X]


General | Request | Data Assign | HTTP Response Status Codes | ?

Name and description


Web service:  Name your web service task and optionally give it a description.

Description:

Address

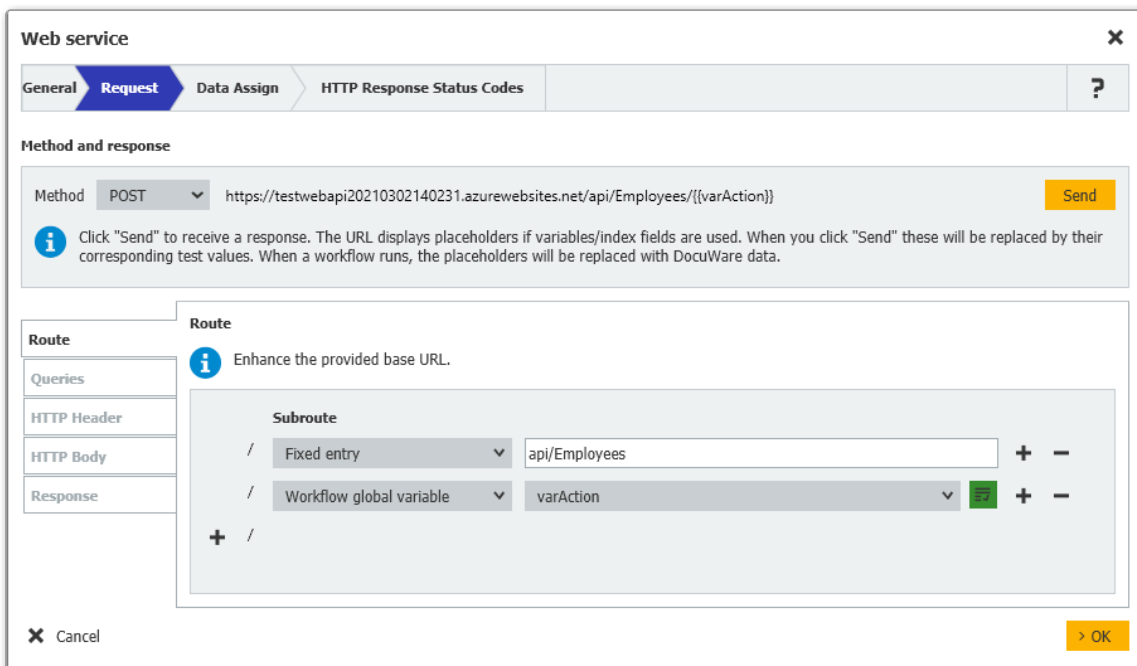
Web service:  Web services registered in the DocuWare configurations are displayed here. Additional settings will appear, depending on your selection.

URL:

Format:  Choose the format that your REST service API will use. If unsure, check your API's documentation.

[X] Cancel > OK

First select the web service and specify the format for data exchange. The services that were previously set up under "Web services" in DocuWare Configuration are available for selection. Any further required information will differ depending on the web service type selected. In this example, it is a REST service.




Web service [X]


General | Request | Data Assign | HTTP Response Status Codes | ?

Method and response

Method: 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

 Enhance the provided base URL.

Subroute			
/	Fixed entry	<input type="text" value="api/Employees"/>	+ -
/	Workflow global variable	<input type="text" value="varAction"/>	+ -
+ /			

[X] Cancel > OK

In the second step, select the method and create the view in the guided interface, this will then be displayed to you in the preview at the top. You can dynamically design the URL path, query parameters, and body content with variables. Afterwards, test the view and check the "Answer" tab to see if the view was successful.

Web service

General Request **Data Assign** HTTP Response Status Codes

JSON Data Assign

Assign data by defining the exact path to the appropriate lines from your REST API's Source. This data will replace the data in the manner described by the method.

JSON Path	Destination type	Destination value		
<input type="text" value="\$.[0].firstName"/>	Workflow global variable	varFirstName	+	-
<input type="text" value="\$.[0].lastName"/>	Workflow global variable	varLastName	+	-

+

Cancel OK

In the third step, assign values from the answer variable or index data. Simply select the required values from the JSON or XML from a tree view (see below).

Data Assign Path

This is a representation of the JSON object which you received from the test call. Please select some items and press "OK". This will generate a selected JSON path.

Collapse all Expand all

```

Array
├── id : 7890862a-0c39-44a9-9344-ce89b8e6f355
├── firstName : Big
├── lastName : Boss
├── employeeNum : 1
├── position : CEO
├── manager : null
├── substitute : null
├── hiredDateDateTime : 1/1/0001 12:00:00 AM
├── hiredDateUtcDateTime : 1/1/0001 12:00:00 AM
├── dateOfBirth : null
├── isActive : null
├── yearsInt : null
└── bonusDouble : 0
    
```

Cancel OK

2 What's new in the Client and Desktop Apps

2.1 Handle table fields more easily

Component: Web Client

Filling and editing table fields is now much easier and clearer. New features have been added; the display of the table fields has been revised.



Applications

- Select one, several, or all rows
- Delete content of the selected rows
- Delete selected rows

Items 4 rows						
<input type="checkbox"/>	Item	Quantity	Price each	Amount	Cost Center	
1	STEEL GIRDER 5M	1,000	320.00	320,000.00	500 - Production	
2	STEEL GIRDER 10M	1,000	600.00	600,000.00	500 - Production	
3	RAIL 5M	500	210.00	102,000.00	500 - Production	
4	BOLT TYPE 50B	2,500	2.80	6,000.00	500 - Production	
<input type="checkbox"/>						
Σ		5,000	1,132.80	1,028,000.00		

Table field without selected row: Clear display of contents and sums, values of read-only fields are greyed out

Tabelle 1 row selected						
<input type="checkbox"/>	Item*	Quantity*	Price Each	Amount*	Cost Centre	
<input checked="" type="checkbox"/>	Printing Paper	15	3.50	52.50	107463 Office supplies	
2	Office Chair	6	240.00	1440.00	107463 Office supplies	
3	Milk 1l	300	1.29	387.00	107463 Office supplies	
4	Windows Cleaner (1l)	140	2.99	418.60	107463 Office supplies	
<input type="checkbox"/>						
Σ		461	248.48	2298.10		

Table field with selected row: new toolbar makes it easier to work with whole rows



Benefits

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

- Improved display of the sum for fields whose entries are to be added, for example *Amount*
- Clear display of fields with the "Read only" option

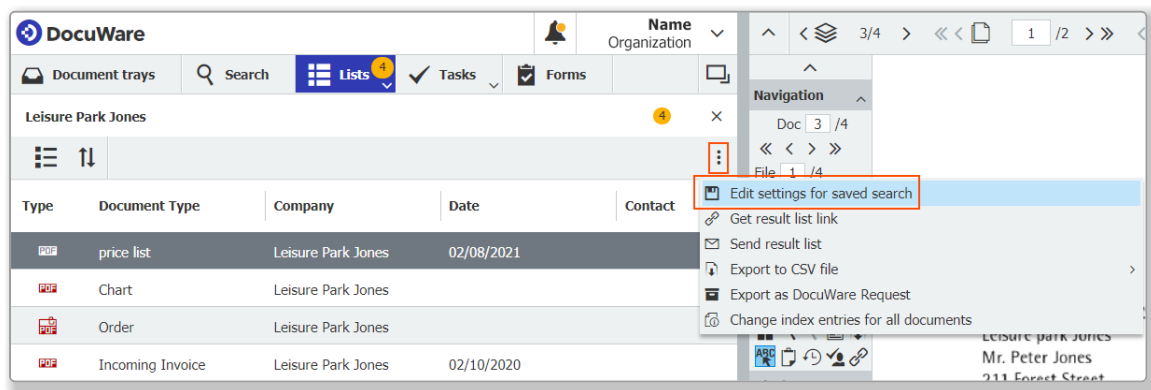
 Here's how

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

2.2 Processing saved searches

Component: DocuWare Client

For saved searches you can enter a new name and the interval for automatic update (page 16). To do this, select the desired saved search under *Lists* in DocuWare Client. When the results are displayed, select the new *Edit settings for saved search* feature in the result list menu.



2.3 Windows Explorer Client: full feature set also with Windows 10

Component: Windows Explorer Client

The interface looks the same as usual, but a lot has changed "under the hood." DocuWare Windows Explorer Client has been completely redesigned to ensure compatibility with Windows 10.

New features under Windows 10 include:

- Pin to Quick Access Toolbar/to Start menu
- Store items from a browser window in Windows Explorer Client
- Create links to file cabinets, document trays, and folders
- Checkout icon is visible
- Document tray properties are displayed
- *Send by mail as attachment* option available

Here's how

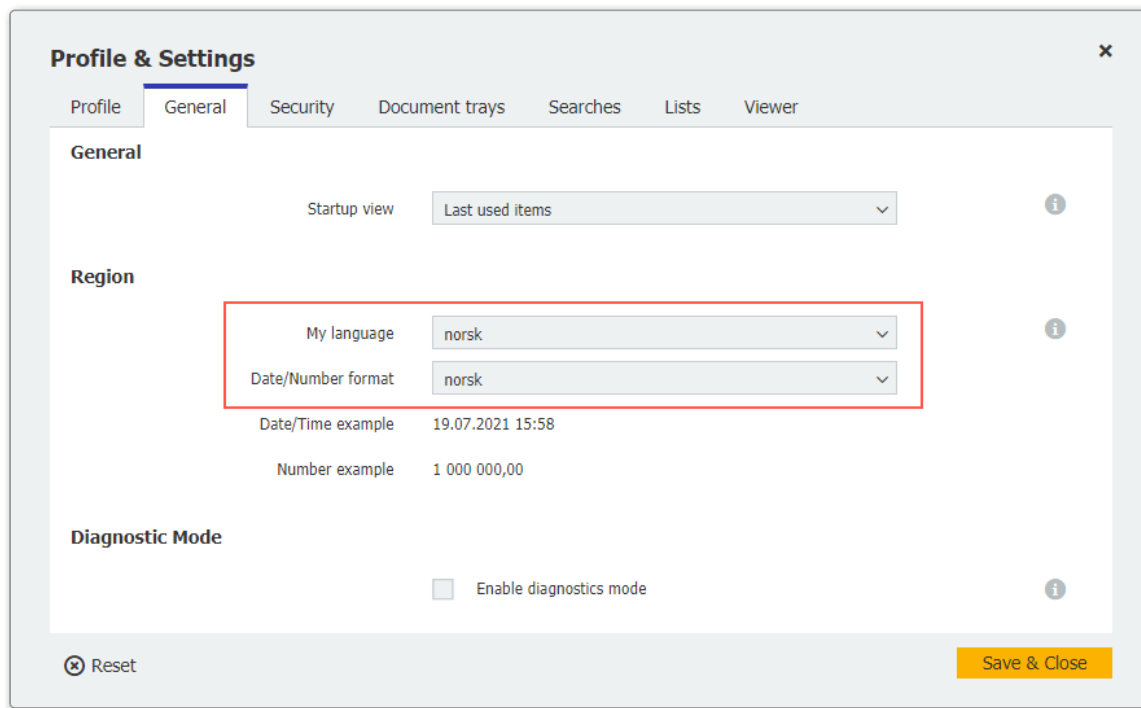
Setup and operation remained the same. You can install the new Windows Explorer Client via the Desktop Apps: Main menu in DocuWare Client > *Desktop Apps* > *Install Desktop Apps*. Under Client Setup, select the Windows Explorer Client.

As a prerequisite for the new Windows Explorer Client, the DocuWare Client Setup installs .NET 5 if this is not already present on the client machine.

2.4 More user interface languages

Components: Web Client, DocuWare Configuration, Workflow Designer, Mobile

With the addition of Danish and Norwegian, the majority of the DocuWare user interface is now available in 20 languages, enabling more users to use DocuWare in their native language.



Profile & Settings

Profile General Security Document trays Searches Lists Viewer

General

Startup view Last used items

Region

My language norsk

Date/Number format norsk

Date/Time example 19.07.2021 15:58

Number example 1 000 000,00

Diagnostic Mode

☐ Enable diagnostics mode

Reset Save & Close

From the DocuWare main menu, open the Profile & Settings area to change the language and value formatting.

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

2.5 Simplified update of Desktop Apps

Component: DocuWare Desktop Apps

Administrator rights are no longer required to update already installed DocuWare Desktop Apps via the DocuWare Client Setup user interface. Updates can thus be run more easily and quickly by users themselves on their client machines.

Administrator rights are still required for the reinstallation of Desktop Apps, for updates via the Client Setup CMD, and for terminal server environments.

3 More power in automatic document processing

3.1 Use mail attachments for indexing

Components: DocuWare Configuration > Connect to Outlook, DocuWare Import

When storing Outlook emails, you can now use the contents from attached PDF documents for indexing in addition to the email properties. Previously it was only possible to extract attachments in XML format.



Application

An employee receives an invoice attached to an email in Outlook. They move the email to a monitored Outlook folder so that the email import starts automatically. The amount, subject, invoicing party, and date from the invoice are transferred to the corresponding index fields without manual intervention and are available in the file cabinet for searching. If configured accordingly, the new invoice appears immediately in a list or an appropriate workflow is started.



Benefits

- Use relevant information from PDF attachments as index values
- Automatically read QR codes on invoices and other attached documents and enter them as index values

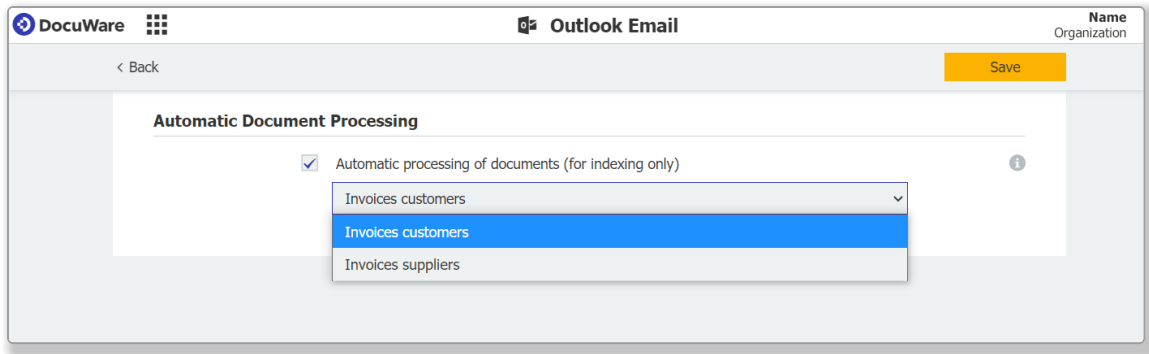


How to set it up

In order for a PDF file in the email attachment to be read for indexing, first create a *Folder type document processing configuration* under *DocuWare Configuration > Document Processing*). Here you'll define, among other things, the selected file cabinet and the settings for indexing.

Next, go to the relevant Connect to Outlook store configuration and select the document processing configuration you created earlier in the section *More options for Outlook emails*. Only the *Folder* type configurations are displayed in Connect to Outlook.

Note: To avoid storage conflicts, use the same store dialog in the document processing and Connect to Outlook configurations. If both configurations index the same field, document processing overrides Connect to Outlook indexing. Only indexing is used by document processing, further features such as splitting are not available here.



Only the "Folder" type document processing configurations are displayed in Connect to Outlook.

3.2 Text recognition in additional languages

Component: Desktop Apps > Text and Barcode Recognition

DocuWare now also supports text recognition in the following languages:

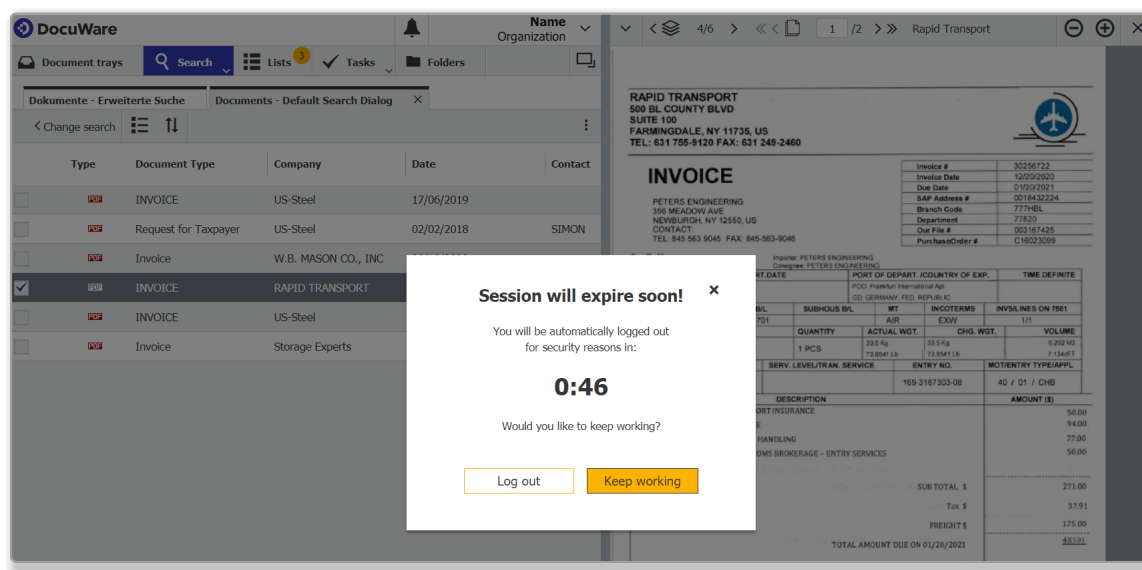
- Thai
- Vietnamese
- Malay
- Hebrew

4 What's New in Configuration

4.1 Automatically log out of DocuWare

Components: DocuWare Client, DocuWare Configuration > Organization Settings

In case of inactivity, a user can be automatically logged out of DocuWare Client and DocuWare Configuration. If no input is made within a certain time, the user first receives a notification with an appropriate message before being logged out and redirected to the login window:



If the timeout is exceeded, the user is logged out of all DocuWare Client browser windows and out of DocuWare Configuration. Clicking anywhere in a browser tab will cause the timer to count down from the beginning. Automatic DocuWare Client activities such as notifications do not reset the timer. Unsaved changes are discarded when you log out.



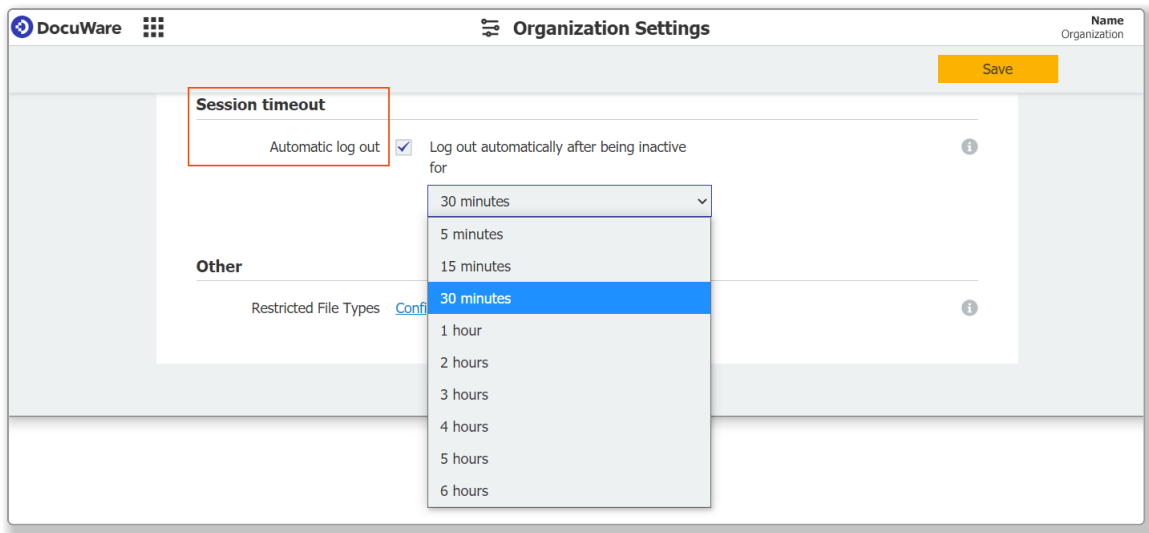
Benefit

- Protection against unauthorized access, e.g. if the machine has not been locked when the user is out of office



Here's how

Enable automatic logout under *DocuWare Configuration > Organization Settings > Security* and also define the maximum period of inactivity, as shown below.



The automatic logout applies to the entire organization. If it is enabled, the Remind option will no longer be available when logging in.

In forms, automatic logout only takes effect for non-public forms. Public forms do not require a real login and are therefore exempt from the timeout. Even standalone apps such as Connect to Outlook or DocuWare Administration do not automatically log out.

4.2 Define your own refresh interval for lists

Components: DocuWare Client, DocuWare Configuration

Set an interval for automatic updating of lists. The shortest interval is one second, the longest is ten minutes. This applies to lists configured in the *File Cabinet* area and to saved searches. For predefined lists, it was previously only possible to generally enable or disable updating. For saved searches, the automatic update was always enabled and also not configurable.

Benefit

- In many file cabinet activities, the entries of a result list jump constantly, which can be inconvenient for users. With a longer refresh interval, the list is always easy to read.

Here's how

You apply the settings for lists and saved searches in different places:

- For lists, set the refresh interval under *DocuWare Configuration > File Cabinets > Dialogs > List > List x*.
- The interval setting for saved searches is located in the new [saved searches option](#) (page 10) in DocuWare Client.

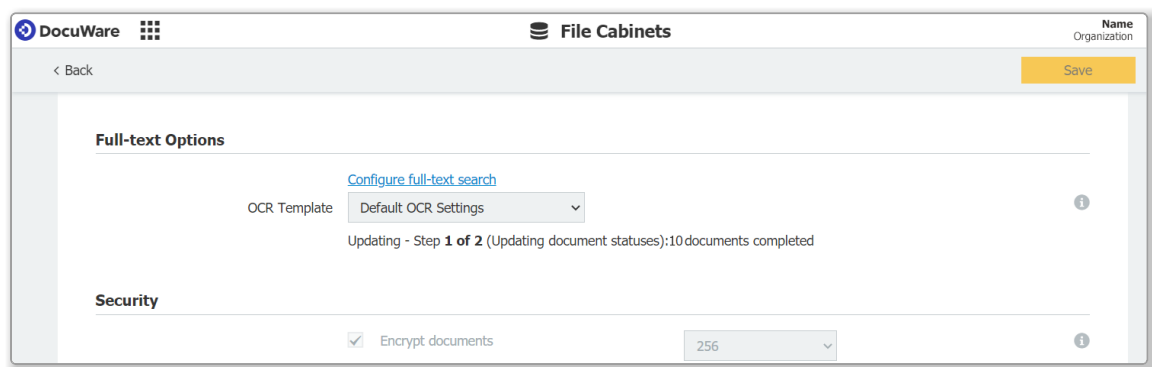
4.3 Progress of the fulltext reset always in view

Component: DocuWare Configuration > File Cabinets

For file cabinets with thousands of documents, a fulltext reset can take a long time. In order to estimate when the fulltext search will be available again, the status of the reset process is now displayed in two stages under the options for the relevant file cabinet:

1. Updating the document status
2. Number of documents already re-indexed.

The status display updates every ten seconds in blocks of 50 processed documents (0 / 50 / 100 / 150 etc.). If the browser window with the file cabinet configuration is inactive for a while or the window is closed, the display updates when the window is reopened.



The file cabinet options now display the status of the fulltext reset

4.4 Use more LDAP attributes as user names

Component: User Synchronization Version 2

DocuWare supports three additional LDAP attributes with CN (common name), *displayName*, and *name*. These can be selected to display the user name when importing users from Microsoft Active Directory.



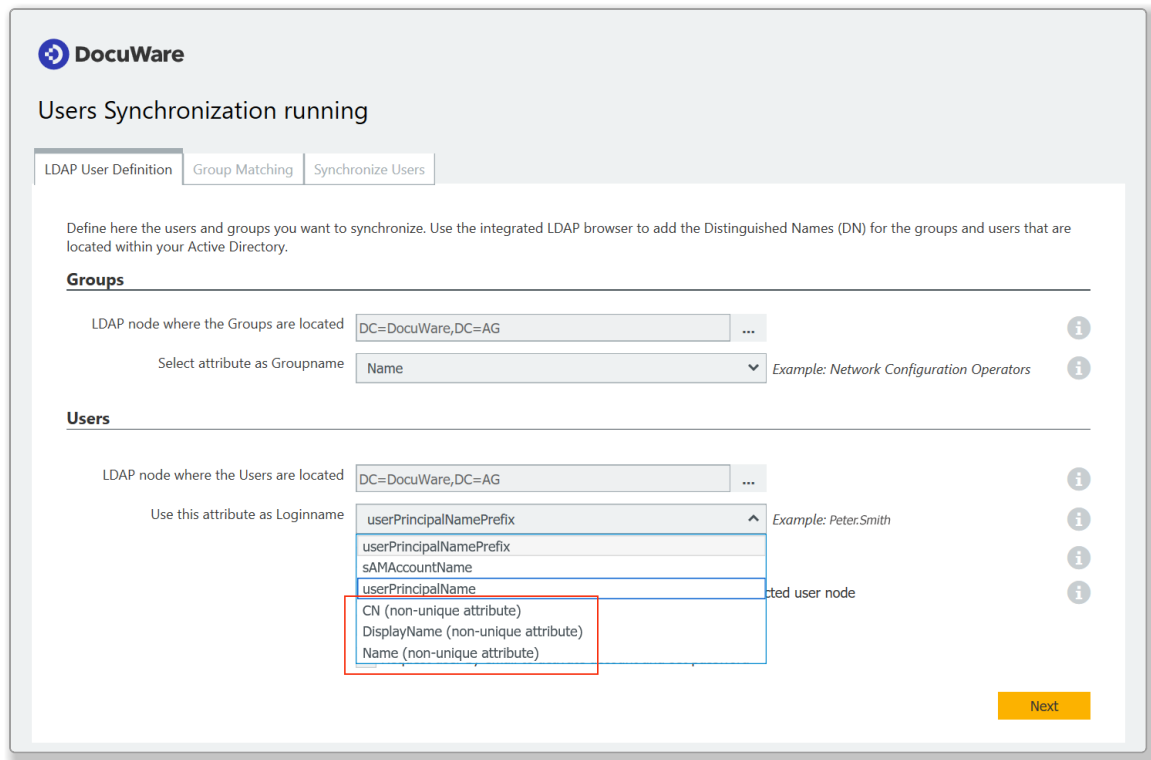
Benefits

- Greater choice for the format of user names in DocuWare
- Easier migration to *User Synchronization Version 2* if CN, *displayName*, or *name* are used in Version 1



How to set it up

The three new attributes *CN*, *displayName*, and *name* can now be selected in the *User Synchronization Version 2* Desktop App in the *LDAP User Definition* tab from the *User > Use this attribute as login name* drop-down menu.



Users are matched and synchronized in Microsoft Active Directory and DocuWare using the attribute selected in the windows above.

Unlike the user name attributes already supported in DocuWare, the new *CN*, *displayName*, and *name* are not unique. Active Directory can therefore contain multiple entries with the same value for common name. In this case, the corresponding user is not imported and the administrator is notified so that they can clean up Active Directory.

4.5 Configuring Web Services with REST

Component: DocuWare Configuration > Web services

In addition to SOAP web services, you can now use REST web services to connect DocuWare to third-party applications. Alongside basic authentication, OAuth2 is also available as an authentication method for REST.

Applications

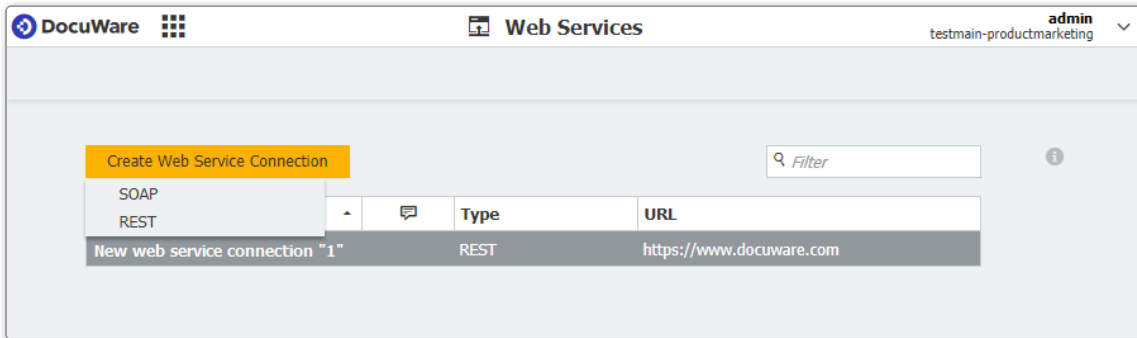
Under *Web Services* in DocuWare Configuration, you basically set up the web services to be able to use them in the following areas of DocuWare:

- Workflow Manager: SOAP and REST services in the web services activity
- File cabinet administration: REST web service for validation
- Webhooks: REST web service as endpoint

Benefits

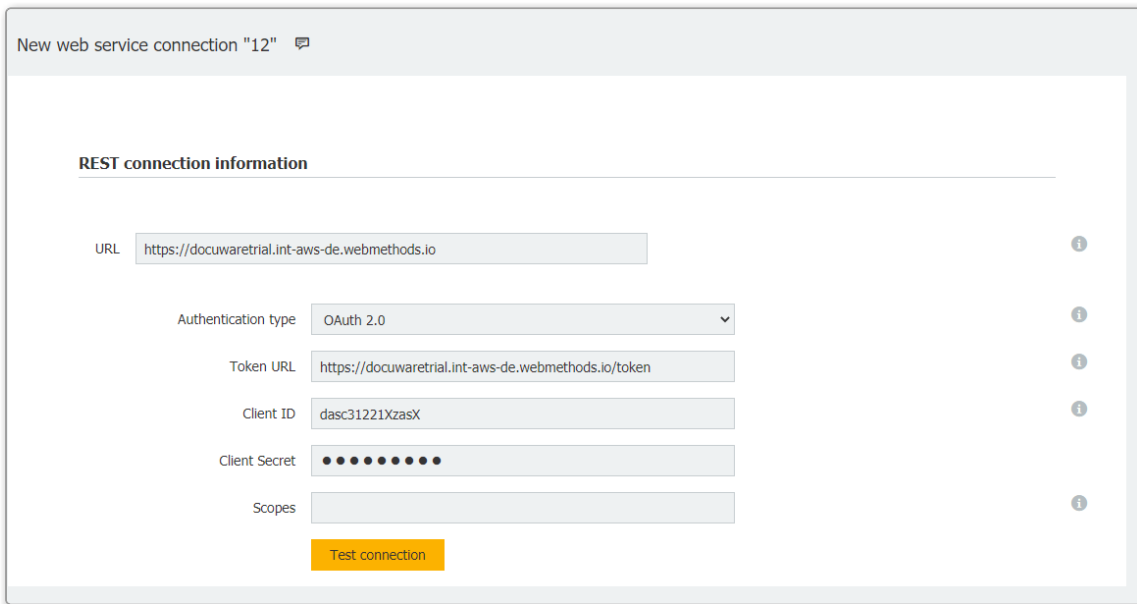
- Covers the full range of web service options
- REST is a future-proof standard
- Flexible authentication with REST

Here's how



Type	URL
REST	https://www.docuware.com

Select whether you want to set up a SOAP or REST type web service.



REST connection information

URL:

Authentication type:

Token URL:

Client ID:

Client Secret:

Scopes:

Change the authentication if necessary.

5 Technical Information

5.1 Modified system requirements

Compared to DocuWare version 7.4, the system requirements for client machines have changed as follows:

- Windows Server 2012 is no longer supported.