

What's new in DocuWare version 7.7

All new features, along with areas of application, benefits for users, and notes on configuration

Preview version exclusively for DocuWare Partners



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1 New and Extended Integration Options

The topic of integration capability continues to have a very high priority in the further development of DocuWare. In many application scenarios, documents initially come from other applications, data that has already been entered in DocuWare has to be transferred to third-party systems, or workflows have to be triggered in other systems due to changes in DocuWare. Nowadays, business processes almost always involve several applications, and their smooth interaction requires their integration.

Since DocuWare Version 7.6, which was launched in Spring 2022, there has been a decisive innovation here: **DocuWare iPaaS connectors**. Connectors from DocuWare and over 1,000 other business applications are available on iPaaS platforms like Make. Creating automated workflows between different cloud applications has never been easier. An intuitive clickable interface eliminates the need for custom programming.

In addition to the topic of integration, there are a number of new features that make daily work with DocuWare much more convenient: Intelligent Indexing automatically transfers complete invoice items into table fields. Filtering options are extended to document trays and support predefined time periods such as last month. In addition, the behavior of select lists within forms has been optimized.

Discover all the new features of DocuWare Version 7.7 to take full advantage of the possibilities and make the most of them for your business.

1.1 DocuWare iPaaS Connector on Make: Automated Workflows in the Cloud

Components: DocuWare iPaaS connectors

DocuWare has developed its own connector specifically for the Make integration platform. Applications and services can be combined on the cloud-based platform with code-free integrations to automate online workflows.

Users use pre-built connectors to exchange data between the more than 1,000 cloud applications available on the Make platform. Complex workflows linking one or more systems with DocuWare can be created in this way thanks to a clickable interface. Time-consuming programming of individual interfaces and their regular updates are no longer necessary.

The DocuWare connector on make.com provides a feature set for exchanging data with other cloud applications. This includes downloading files and documents, deleting them, storing them in DocuWare file cabinets, and setting stamps. It is also possible to append files to stored documents.

Other integration platforms such as webmethods.io and elastic.io now also offer connectors for DocuWare - integrations with locally installed applications are also possible here.





Online workflows on the Make platform, such as this one with DocuWare and QuickBooks, are simply put together with a click and drag & drop. Programming is no longer necessary.



Applications

- Company records from a CRM are synchronized with DocuWare so that the data in all systems involved is always up to date and correct data is always displayed when actively searching for documents in the file cabinets.
- Requests are recorded and archived via a DocuWare form. For further execution, this data is transferred to the ERP.
- If the ERP software automatically creates invoices in PDF format and sends them to customers by email, they can be transferred to DocuWare for legally compliant archiving in the same step, and are automatically linked with the relevant process in the ERP system.



Benefits

- No individual interface programming required
- No maintenance is required: connectors are updated by the providers
- Faster go-live thanks to simple implementation
- Over 1,000 connectors to other cloud applications available



*Licensing

To use the DocuWare iPaaS connector on the Make platform, no special additional license is required on the DocuWare side, only a DocuWare Client license for logging in to DocuWare Cloud. The integrations are billed directly via Make on a transaction basis.

For information on using DocuWare on other iPaaS platforms, visit the providers' websites: Software AG Cloud and elastic.io.



1.2 File Cabinet Notifications via Webhooks Optimized for iPaaS

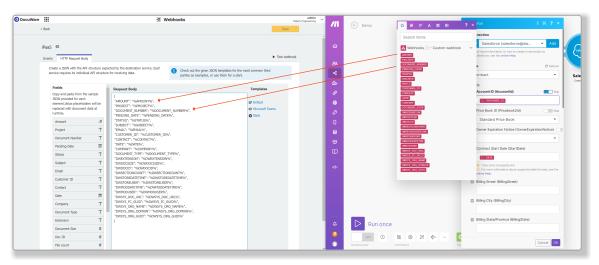
Component: Webhooks

By sending automated file cabinet notifications to integration platforms such as Make, DocuWare makes them available to other business apps - for example, to synchronize the database or trigger workflows. The structure has been simplified to allow the file cabinet notification information to be used "out of the box" in the universal iPaaS connectors.

The variables for file cabinet fields and system information are now composed of key-value pairs, for example {"COMPANY": "%COMPANY%", "CONTACT": "%CONTACT": "%CONTACT"; as is common on Make and other integration platforms.

The editing of the message content has also been further simplified:

- The message content can now be edited directly on the HTTP Request Body tab an additional dialog is no longer necessary.
- To restore the original state, just click *Default* the *Reset to default HTTP Request Body* button has been removed.
- Delete Body removes the entire content with one click.
- The message content is now validated when you Save the webhook.



The information from DocuWare (left) is delivered to Make via webhook and can be used with a click - here in the Salesforce connector (right).





Application

DocuWare notifies the CRM when a new contract is signed and stored. The CRM synchronizes the document status, updates the contract date, and triggers a welcome email for the business partner.



Simpler connection to third-party applications via iPaaS



You create rules for file cabinet notifications in DocuWare Configuration under Webhooks.

1.3 Webhooks: More System Variables Available

Component: Webhooks

Four new variables are available for automated file cabinet notifications:

- File cabinet GUID
- Organization name
- Organization domain (URL), e.g. https://mycompany.docuware.cloud/docuware
- Organization GUID



Application

The variables can be used to configure scenarios on the Make integration platform, for example, so that they can be reused independently of the file cabinet and organization.



Benefits

- The integration can be set up more conveniently.
- If the organization name is changed, the values no longer have to be laboriously adjusted in the configuration.



Here's how

You create rules for file cabinet notifications in DocuWare Configuration under Webhooks. The variables are set in the message content, the HTTP Request Body.



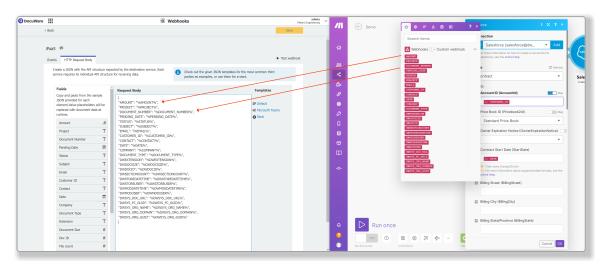
1.4 Templates for File Cabinet Notifications via Webhooks to **Slack and Microsoft Teams**

Component: Webhooks

With the new templates, you can also create automatic notifications for Slack or Microsoft Teams without a lot of preparation. The templates contain preconfigured message text that can be posted "out of the box" to a channel of the messaging applications.

You define the message via the rule editor of Webhooks. By default, this lists all available file cabinet fields and system information, but can also be easily removed from the message text. There is also a button to open the document in DocuWare.

The layout of the message can be customized to your own requirements if you wish. Corresponding help pages are linked in the template.





Application

When a contract is signed with a new customer and stored in DocuWare, DocuWare automatically sends a notification to the company channel in Slack. This way, employees are always informed about new customers.



Benefit

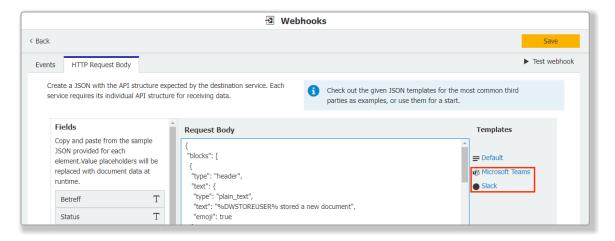
Simple push messages to Microsoft Teams and Slack even without deep programming knowledge



Here's how

The templates for notifications to Microsoft Teams and Slack are available in DocuWare Configuration in the Webhooks module under HTTP Request Body.





You set up the notifications by, for example, selecting the *connections* and incoming webhook in the channel settings in Microsoft Teams.



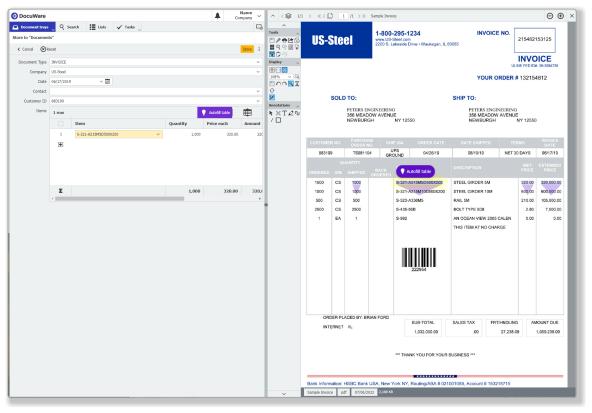
2 For Day-to-day Work with DocuWare

2.1 Intelligent Indexing Automatically Fills Table Fields

Components: Web Client, Intelligent Indexing

Table fields are often used to transfer invoice items to DocuWare. So that it is not a tedious task to manually transfer all items for each invoice to the table field in the store dialog, there is now help from Intelligent Indexing. Using One Click Indexing, you transfer only the contents of the first invoice item to the first row of the table field; Intelligent Indexing automatically transfers all other items to the corresponding rows of the table field. This works for single and multi-page invoices.

And, of course, Intelligent Indexing also learns from tables: manual filling of the first row via One Click Indexing is no longer necessary for similar tables after a short learning phase.



Fill only one row with One Click Indexing; DocuWare takes over all other invoice items automatically





Application

Transfer invoice items to DocuWare



- Significant reduction of manual work
- Significant time savings giving room for new projects on the to-do list



Here's how

Store a document from a document tray for which Intelligent Indexing is enabled. In the store dialog, 'normal' fields are pre-filled as usual by Intelligent Indexing. In the table field, click the plus sign to open the first row. Transfer the necessary contents of the first invoice item to the fields of the first table row via One Click Indexing. Then click either the Autofill table button on the Table Field toolbar or the field of the same name that will appear in the Viewer. All invoice items are then automatically transferred. The tooltip for the button in the toolbar starts an interactive tour that further explains how to use this function.

2.2 Filtering Documents in Document Trays and for Linked **Documents**

Components: Web Client

In addition to result lists, lists, and workflow task lists, document filtering is now also possible in document trays and when listing linked documents.



Applications

- Filtering in the document tray by document name (or parts of the document name using placeholder *) facilitates a focus on the relevant documents for further processing and archiving.
- If the list of linked documents is confusingly long, you can use the filters to hide irrelevant documents and thus quickly access the desired document.



Benefits

- Greater clarity
- Simple restriction to currently relevant documents



Here's how

As soon as you hover the mouse over a column header, the filter icon will appear. Click on it to specify the filter. For document trays, switch to the table view first if necessary.



2.3 Filtering Documents According to Predefined Time **Periods**

Component: Web Client

For filtering documents by date, in addition to the individual from-to range, a number of predefined time periods are now available, Today, Next week, Last month, etc. This applies to document trays, result lists, lists, and lists of linked documents. For workflow task lists, this option exists already.



Applications

- Restrict the entries in the result list without modifying the search. Resetting the filter returns the original result list.
- You have a list of all invoices for your cost center. The Last month filter gives you a good overview of past expenditure. If required, you can also export this filtered view as a CSV file for your monthly evaluation.
- You create yourself a list of documents that are due: start a search for the relevant documents, filter by due date, for example Next Week, and save the search as a list (Here's how). Since the filter is dynamic, the currently matching results are always displayed.

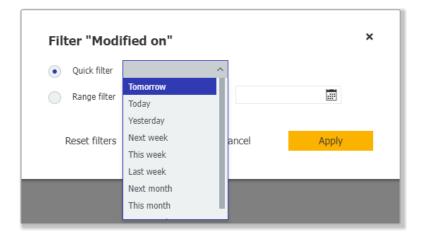


- Always the right documents clearly at hand
- Useful for cash flow management
- Easy reporting



Here's how

Point with the mouse to the column header of a date field in the list of documents (in the table view for document trays) and click on the filter icon that appears.



Select the "Quick filter" option to use a predefined period as a filter.

Please note that Week always means a whole week from Monday to Sunday and Month means a calendar month.



2.4 Added Convenience for Select Lists in Forms

Component: DocuWare Forms

In forms, up to 1,000 entries of select lists are now displayed at one time. Previously, the visible block was limited to 50 entries. When filling in a dropdown field, for example, the appropriate values can be entered quickly.

2.5 Stopping Multiple Requests at Once

Component: Workflow tasks in Web Client

If you have sent several requests that are still open, you can now stop all of them at once using multiple selection.

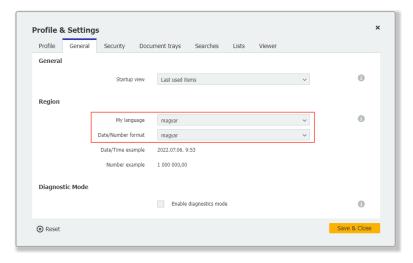


Saves time

2.6 User Interface in Hungarian

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

With the addition of Hungarian, the majority of the DocuWare user interface is now available in 22 languages, enabling even more users to use DocuWare in their native language.



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

The <u>overview of supported languages</u> shows in detail which DocuWare components are available in which languages.



What's New in Configuration

3.1 Export: Configuring Separator More Conveniently

Components: DocuWare Export, Desktop Apps

The option to separate index field data into multiple columns during data export is now easier to configure. For this purpose, a select list of already existing entries is available, which serve as samples for the positioning of separators. The columns for the resulting entries are then created automatically.



$lap{1}{2}$ Application

The export data contains the number and name of a cost center together in one entry and you want to split this information into two entries.



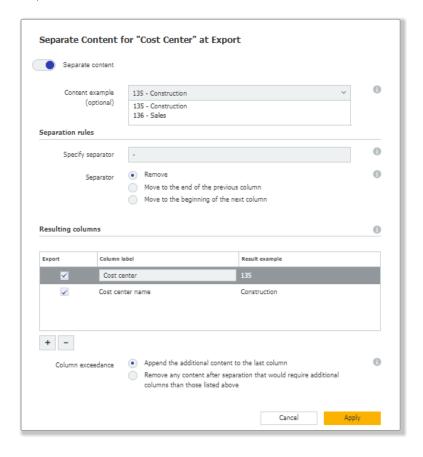
Benefit

Split entries intuitively using a select list



Here's how

Under Document Record, first create a row for the "Cost Center" content and click Separate content in the same row.





In the Separate Content dialog, entries that have already been processed are available in a select list. After entering the separator, the columns resulting from the sample and the separator are automatically added to the dialog. The settings for Resulting columns are shown as soon as you have defined at least one separator character and click into another area of the dialog.

3.2 Document Processing: Editing Dynamic Entries

Components: Configurations > Document Processing

If you use dynamic entries in text, memo, and keyword fields in a document processing configuration, you can now edit these text entries as if they were read text. Dynamic entries include user name, user email address, or parent folder name.



🖺 Application

You use a program that specifies the name of the source folder for documents. However, the name contains several index criteria, for example "USSteel-Invoice-10022022." If you need all the information, separate it into multiple entries. If only one criterion is to be entered, simply define its text.

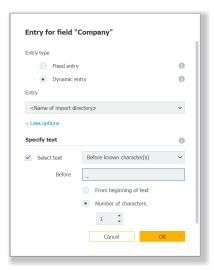


Benefits

- Further use existing information in a targeted manner
- Specify indexing
- Improve search results



Here's how



Add a dynamic entry and click More options to open the Specify text dialog. Select the text to be taken from the dynamic entry. If the text is to be distributed among several index entries, enter the separator for it. If the text starts after several characters, use Number of characters to specify after how many characters.

Options for the text selection:

- After known character(s)



- Before known character(s)
- Between known characters
- From known character position
- Between separators

3.3 Sum in Table Fields Optional

Component: Configurations > File cabinets

Decide for each store and index dialog individually whether the sum is displayed for a table column. A sum is useful for amounts, for example, but is less useful if the field contains article numbers.

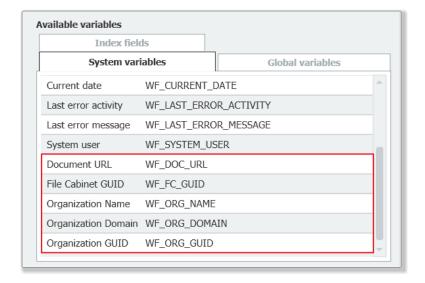


The option to create a sum is located in the dialog settings in the properties of a table field.

3.4 Workflow: More System Variables Available

Components: Workflow Designer

Five additional system variables are available for the workflow configuration:





Application

• Provide even more specific data via the web service activity, for example, the URL to the document.



- Extends integration capabilities
- Greater flexibility



3.5 New Full-text Server for On premises Systems

Components: DocuWare On-premises, fulltext server

The new fulltext server meets current security requirements and now delivers search results even faster. It is based on the SoIR 8 platform, which is already in use in DocuWare Cloud.



Here's how

The fulltext server is automatically installed during setup for both new systems and when updating existing systems.

Please note that fulltext data is rebuilt during the update for all file cabinets with fulltext support, and during this time the fulltext search cannot be used.



4 Technical Information

4.1 System Requirements and Limitations

There are the following changes compared to DocuWare Version 7.6:

System requirements

Only for on-premises

• .NET 6 is delivered with the server setup. Operating systems that are not compatible with .NET 6 are not supported.

Limitations

Only for DocuWare Cloud

• The file size for document display in the Viewer is limited to 2GB.