What's new in DocuWare version 7.8

Features, use cases and benefits for users

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1 Version highlights

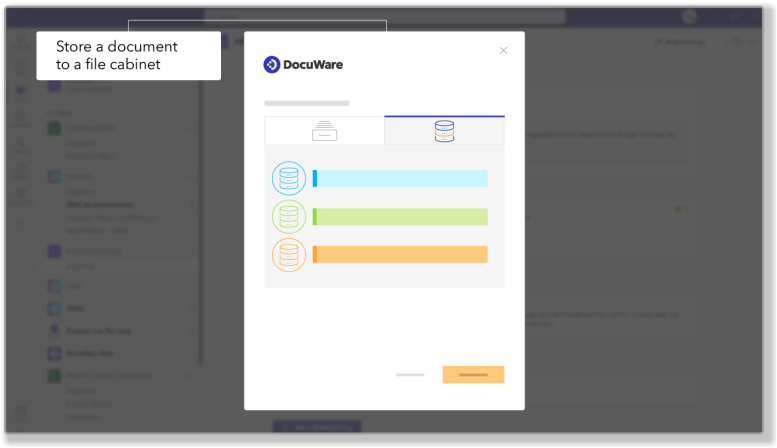
1.1 Connect DocuWare to Microsoft Teams

Component: Connect to Teams

Native integration of Microsoft Teams in DocuWare is now available to customers with a DocuWare on-premises system. As with DocuWare Cloud, the interaction between the communication platform and DocuWare takes place in both directions:

From Teams to DocuWare via app

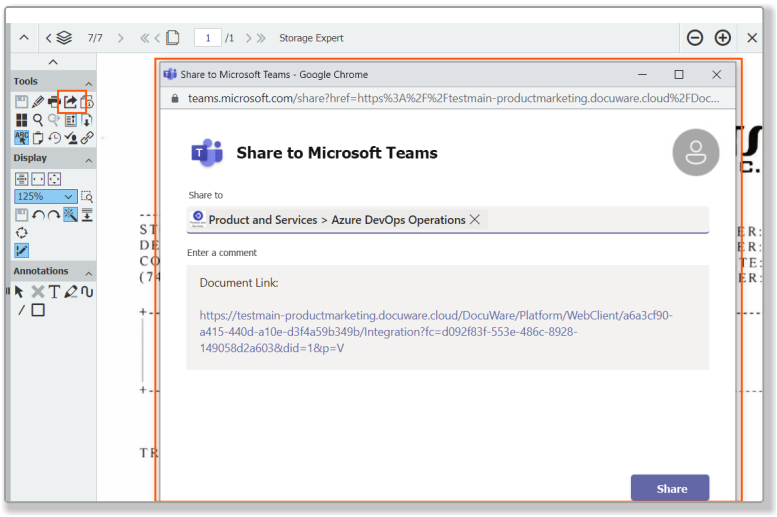
The DocuWare app in Microsoft Teams allows you to connect the communication platform to our document management solution. Documents shared in chats and channels can be imported into a document tray or file cabinet. When storing documents in the file cabinet, the DocuWare store dialog also opens directly in Microsoft Teams so that you can index documents using the usual tools, such as *One Click Indexing*. For customers with a DocuWare on-premises system, the store dialog opens in a browser tab instead of directly in Teams.



Documents from Microsoft Teams can be stored directly in DocuWare, either in via a document tray or directly to a file cabinet.

From DocuWare to Teams using the share function

In addition, DocuWare Client offers the *Share in Microsoft Teams* option for archived documents. This means you can post archived documents to a chat or channel in Microsoft Teams directly from DocuWare via a link.



Directly in DocuWare, select the chat or channel in which you want to post the link to the document

Applications

- During a meeting with a customer, they might share additional documents relating to the project via the chat. You can archive the documents securely in DocuWare while the meeting is still in progress, making them accessible to all authorized employees.
- You can archive a supplier's offer and make it available to the project group in Microsoft Teams using a DocuWare link.

Benefits

- Documents are easy to find, including in context with other business documents, instead of scattered in chats and channel messages
- Documents shared in Teams are archived in DocuWare in an audit-proof manner
- You don't have to leave DocuWare to share documents
- Documents shared by link remain protected in Microsoft Teams by the permissions defined in DocuWare

Here's how

First enable the **DocuWare app** within Microsoft Teams in the *Apps* area and connect it to your DocuWare system. Documents can be imported in Teams via the Options menu of the chat/channel message to which the document is attached.

In order to use the **Share with Microsoft Teams** function, it needs to be activated once by the administrator for the organization: DocuWare Configuration > *Organization Settings* > *General* > *Collaboration* area and enable the *Use of the share function with Microsoft Teams* option. The share function will then be available in the DocuWare Viewer as well as in the context menu of lists and result lists.

Licensing: To use DocuWare on-premises systems, you will need the *Connect to Teams* add-on module. The functionality is included in the DocuWare Cloud license package.

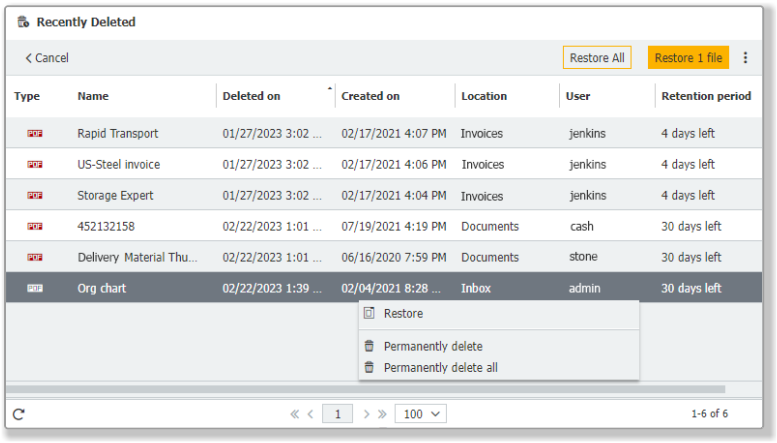
1.2 Trash Bin: Restore Documents on Your Own

Component: Web Client

When deleting documents, they are no longer immediately and completely deleted, but are first moved to a trash bin. This enables users and administrators to easily recover accidentally deleted documents.

The trash bin is used as a destination in all delete operations – in the document tray and in the file cabinet, manual or automated, including deletion policies. The deleted documents can then only be accessed directly via the trash bin and are excluded from searches, workflows, and automated processes.

Documents can be manually restored or permanently deleted from the trash bin. The latter happens automatically after a period of 30 days.



Trash bin from the administrator's perspective: For each document, it shows where it was previously stored, who deleted it, and how many days are left before it is permanently deleted

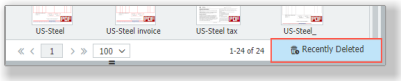
Applications

- A user has accidentally deleted a document in DocuWare. With a few clicks, they can restore it themselves, regardless of whether the document was in a document tray or file cabinet.
- An incorrectly configured deletion policy has deleted too many documents from a file cabinet. The owner of the file cabinet can restore the affected documents at once saving the user time and effort.

Benefits

- Self-service and immediate recovery for accidentally deleted documents by the user
- With DocuWare Cloud, a document restore is possible without assistance from DocuWare Support, with on-premises without access to customer's local backup
- More security for documents in the document tray, where deletion cannot be prevented via rights control

Here's how



You can access the trash bin in the Web Client via the *Recently Deleted* button in the status bar of document trays, result lists, lists, etc. It doesn't matter where you open the trash bin from, all documents in the trash bin that you are allowed to see are always displayed. These are all the files that you have deleted yourself as well as deleted documents from document trays that you have access to. File cabinet owners can also see all documents that have been deleted from the relevant file cabinet. You can find more information on trash bin rights in the Help section.

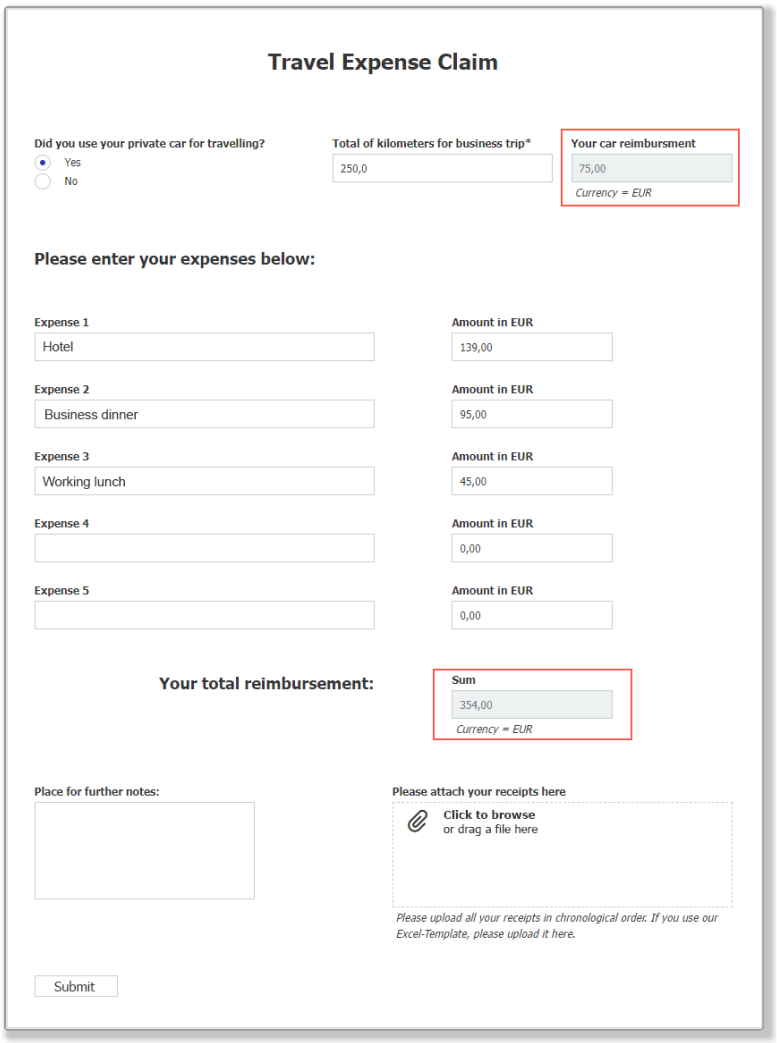
Trash bins are created automatically for all systems, both cloud and on-premises, with the above settings so you do not have to configure anything.

Please note that DocuWare Cloud counts the data volume in the trash bin towards the storage quota.

1.3 Calculation of Field Content for Forms

Component: DocuWare Forms

You can now store an automatic calculation for number fields in forms. For example, you can add up user input from other fields and display the total in an additional read-only field. In addition to field entries, you can also use fixed values for the calculation; the four basic arithmetic operations and parentheses are available as operators.



The contents of the fields marked in red are calculated automatically and displayed immediately when the form is filled out

Applications

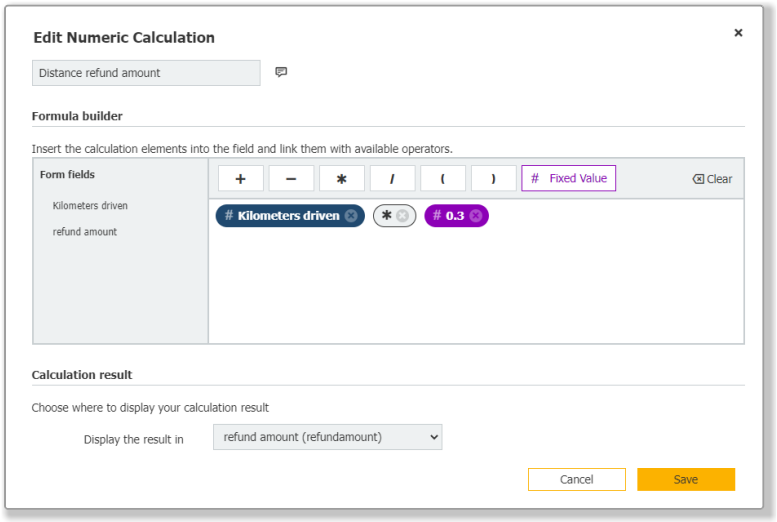
- In a travel expense form, the employee enters the number of miles driven. Another field immediately shows them the reimbursement amount they can expect. In the background, the number of miles entered is multiplied by the reimbursement amount per mile as a fixed value.
- In addition, the employee enters the amounts of other expenses incurred during the business trip. All these amounts and the mileage allowance are added up in the background and the total is displayed for the employee for information.
- The grand total is also transferred to an index field so it is directly available for further processing. In the workflow, for example, the reimbursement request can be routed to two people for approval once a certain amount is reached.

Benefits

- You can use numerical inputs for other calculations immediately when filling out the form
- Greater intelligence for your forms
- Removing the chance of human error calculations, saving staff valuable time
- Faster further processing of documents (applications, etc.) since the calculated values are used as index entries

Here's how

In the Form Designer, click *Calculations* in the top menu bar or under the field settings to open the formula generator.



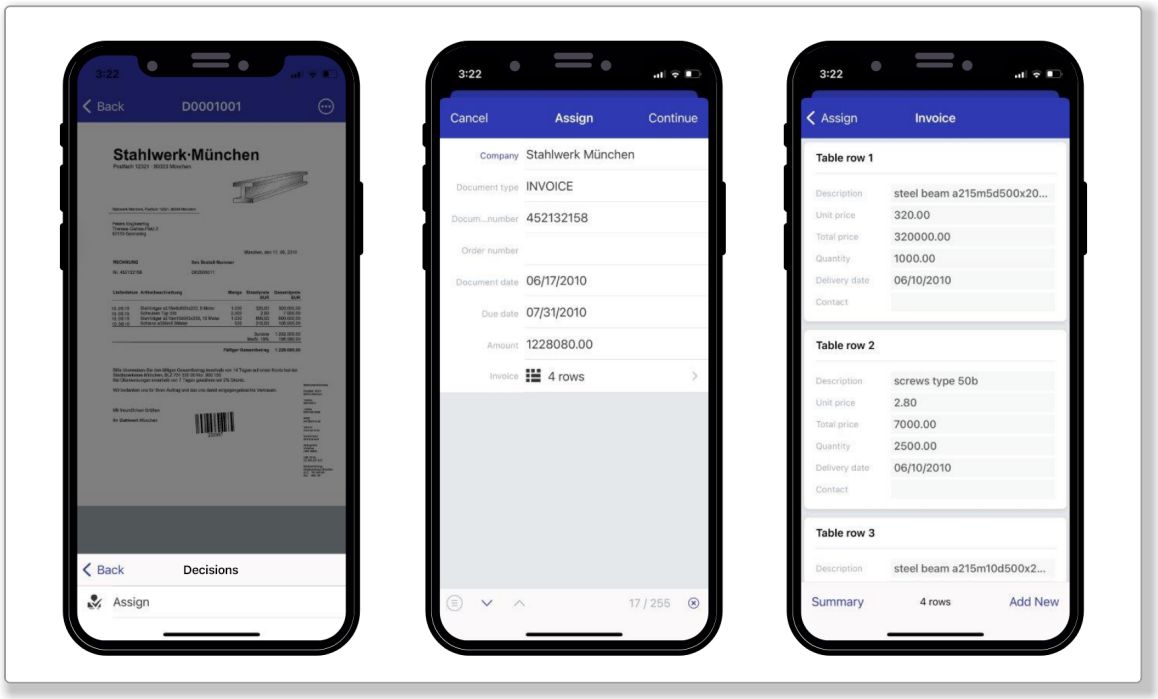
Input from form fields, fixed values, the basic arithmetic operations, and parentheses are available for the formulas. Finally, specify in which form field the result should be displayed.

2 For Day-to-day Work with DocuWare

2.1 Index Tables for Mobile DocuWare App

Component: DocuWare Mobile

The latest update for the DocuWare app includes support for index tables on mobile devices. Index entries from table type fields can be viewed and modified. Existing rows of index tables can be deleted, and new rows can be added.



Applications

- Assignment of individual invoice items to the appropriate cost centers
- Approval of individual invoice items

Benefit

- Use of familiar functionality from the Web Client on mobile devices

Here's how

The index tables are accessed via *index entries* for archived documents and, in workflow tasks that require entries in index tables, in the relevant decision.

2.2 Fulltext Search Terms Highlighted in Viewer for Integrations

Components: Web Client, Smart Connect, URL integrations

In the Highlight Search of DocuWare Smart Connect, fulltext search terms are now highlighted in the Viewer and you can jump from one occurrence to the next. This highlighting also works in general for URL integrations if a fulltext search is stored.

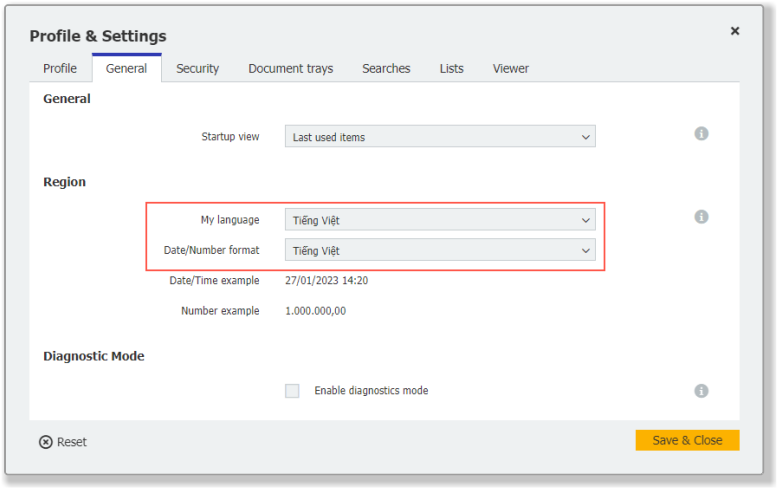
Benefits

- Recognizing search term occurrences immediately in the document
- Jumping from one occurrence to the next

2.3 User Interface in Slovenian and Vietnamese

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

With the addition of Slovenian and Vietnamese, the majority of the DocuWare user interface is now available in 24 languages, enabling even more users to use DocuWare in their native language.



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

The overview of supported languages shows in detail which DocuWare components are available in which languages.

3 Workflow Management

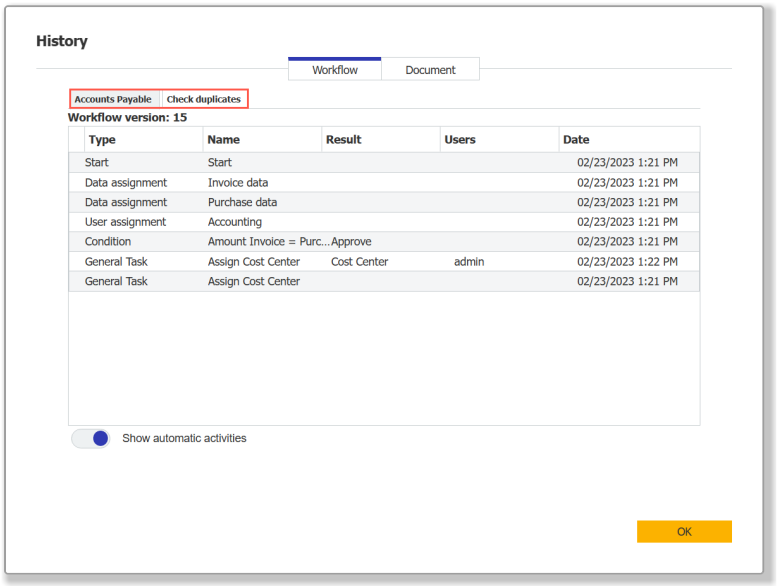
3.1 Workflows and Requests Sorted by Date

Components: Web Client, Workflow Manager

In the workflow history, the tabs for workflows and sent requests are now sorted by start date. They begin on the left with the last workflow started or the last request sent, and end on the right with the oldest one.

Benefit

- Viewing the current workflow or request at a glance



3.2 Optionally Displaying the Sum in Index Tables

Component: Workflow Designer

In workflow tasks involving index tables, you can decide whether the sum of a decimal column should be calculated and displayed at the bottom of the workflow form.

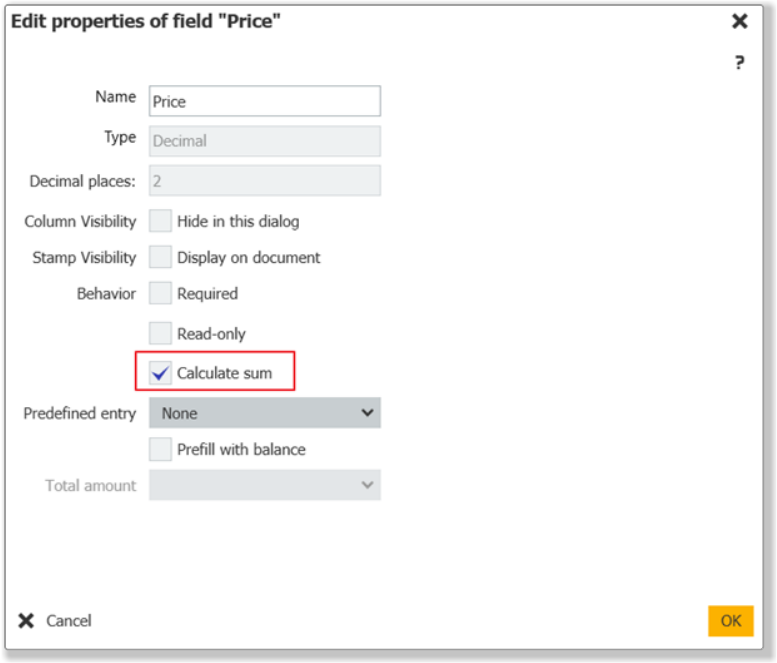
Application

- Use the sum option where it makes sense, for example in the invoice workflow for amounts, but not for item numbers.

Benefit

- Additional information readily available

Here's how



The option to create and display a sum can be found in the *Task* or *Parallel Task* activity in the table properties settings.

3.3 Creating a More Convenient Web Service

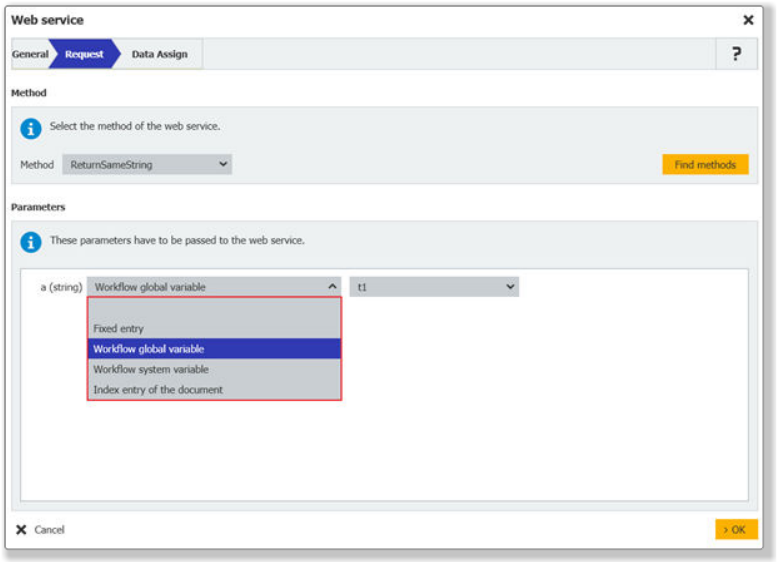
Component: Workflow Designer

When specifying the parameters to be passed to a SOAP web service, the following are now available for selection in addition to the global workflow variable: *fixed entry*, *workflow system variable*, or *index entry of the document*. Therefore, this information no longer needs to be stored in advance in global variables to make it available.

Benefits

- Direct access to information
- Configuring a workflow more quickly

Here's how



In the web service activity, go to *Request* and select the parameter from the list. Existing configurations are automatically updated to the appropriate source.

3.4 Comparing and Assigning Data in Index Tables

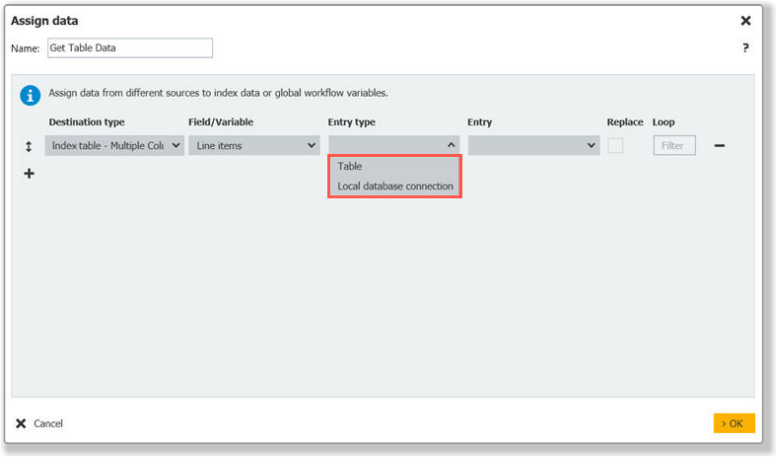
Component: Workflow Designer

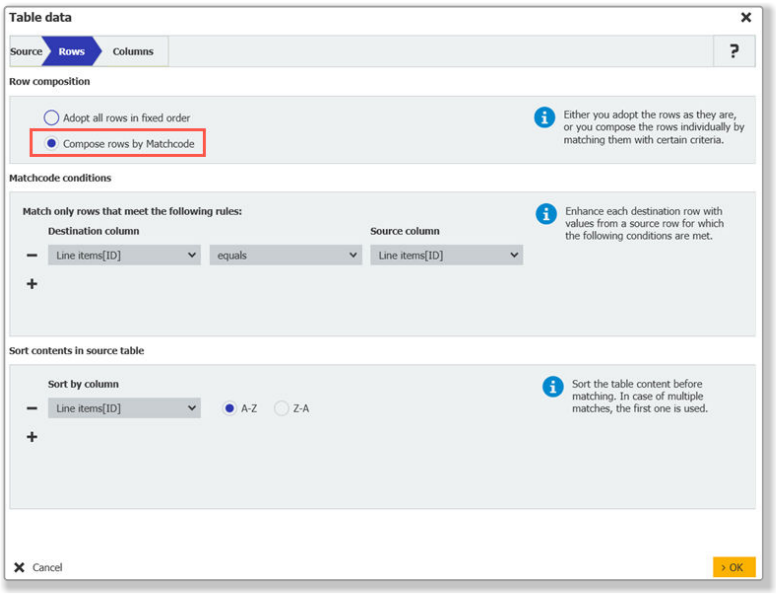
To modify and assign data in index tables even more flexibly, two new options are available to you:

- **Transfer data from external tables to DocuWare index tables**
  You can now also transfer data from external database tables to DocuWare index tables, directly (on-premises) or via the Local Data Connector (cloud). Previously, only source data from other DocuWare index tables was possible.
- **Transfer index data to tables if other table values match**
  To transfer individual values from another index table or an external table to defined table cells, identify the rows using a match code. Until now, table data could only be transferred in a fixed order and the rows could either be replaced or appended.

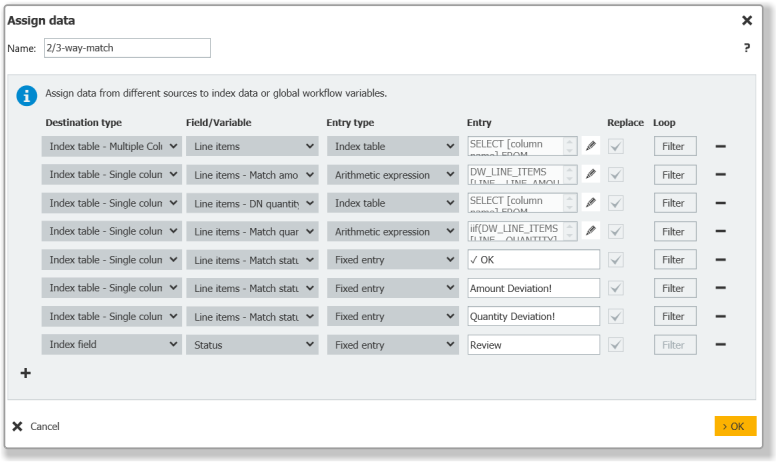
Applications

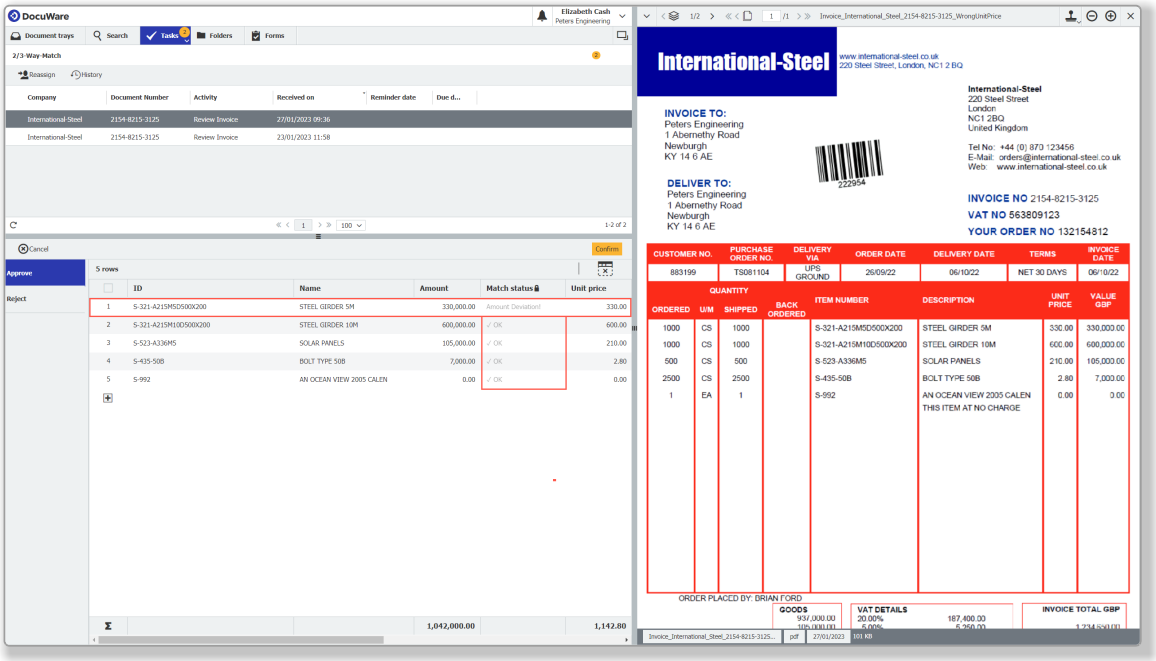
- Automatically retrieve the current item name and unit price for an order from the material master or price list by using the item ID as the match code.
- Transfer data from an ERP or HR system database to the index table of a document in order to use this information in your workflows.





- As part of the purchase-to-pay process, you match position data between the invoice and the delivery note, order, or order confirmation. Based on the item number, you can check whether delivery quantities, unit prices, and amounts match and automatically release the invoice for payment.





Benefits

- Use data from external tables more flexibly
- Reduce manual input
- Assign data more easily
- Quicken the time to payment, reducing late payment fees

Here's how

In the workflow configuration, select the *Assign Data* activity and then select the following destination type: *Index Table – Single Column* or *Index Table – Multiple Columns* > Source *Index Table* or *External Table*.

3.5 Filtering by Row Number for Data Assignments

Components: Workflow Designer

When assigning data to an index table, you can now filter by the *Row number* system column. This makes it easier to change values only in the desired rows.

Application

- Query a value from the index table of a document in DocuWare to use it for further indexing. It can be used for the same or another document, even from another file cabinet.

Benefits

- Go to row numbers directly
- Assign data more conveniently and quickly

Here's how

In the Workflow Designer, open the configuration > *Assign Data* > Destination Type *Index Table – Single Column* and click the *Filter* button. Or open the dialog for arithmetic expressions and go to the *<Table name> Cells* tab.

If you use the "SYS_ROW_NUMBER" system column, counting starts at row number 1. If the value of a returned column is determined by an index or an indexer, counting starts at 0 as before.

3.6 Improvements for HTTP Requests in Web Services

Component: Workflow Designer

Validate message content for HTTP requests for web services: The body for HTTP requests is now validated, either when clicking *Send* or automatically when saving the configuration. If the content is invalid, the incorrect part is highlighted and a message is displayed, but the configuration can still be saved. In addition, row numbers on the body facilitate troubleshooting.

Encode special characters: There are now three options to choose from when encoding HTTP requests to REST APIs:

- *Encode special characters (recommended)*
  All special characters are encoded, e.g. "AT&T" becomes "AT%26T" and "Rapid Transport" becomes "Rapid%20Transport."
- *Encode special characters except reserved URL characters :?#[]@!$&/*+,;='()*
  Except for the reserved URL characters, all special characters are encoded, e.g. "AT&T" remains, but "Rapid Transport" becomes "Rapid%20Transport."
- *Do not encode special characters*
  Neither special characters nor spaces are encoded.

Applications

- You can create an HTTP request and immediately check whether it is valid.
- If a web service expects values to be passed within the URL, for example a company name with special characters, these are now appropriately encoded.

Benefits

- Certainty that web services contain valid request text
- Transfer values correctly
- Reduce errors

Here's how

Validation: In the workflow configuration, select the activity *Web Service* > *REST Web Services* > *HTTP Body*.

Encoding: In the workflow configuration, select the activity *Web Service* > *REST Web Services* > *Encoding* tab. The encoding is applied to all values whose transfer is specified on the *Route* and *View* tabs, but not to the values of the *HTTP Header* and *HTTP Body*tabs. As of DocuWare version 7.8, the option *Encode special characters* is the new default setting, previously it was "Encode special characters except reserved URL characters :? #[]@!$&/*+,;='()."

4 What's New in Configuration

4.1 More Power for Intelligent Indexing

Component: Intelligent Indexing

Intelligent Indexing automatically detects key information in your documents and suggests these terms as index words for archiving. To further improve the experience when working with large documents, an additional 13 individually definable index fields have been added to the service. In addition to the 11 standard fields, a total of 16 text fields, 5 date fields, and 10 decimal fields are now available, which can be tailored to your company's specific use cases.

Application

- Delivery notes often contain numerous details, for example
  - on the customer: Name, address, contact
  - on the cargo: Weight, length, height, depth
  - on the transport conditions: Temperature, driver, vehicle
  - on the unloading points: City, zip code, hours, duration, date

  With the addition of 13 new fields in Intelligent Indexing, all the important data contained in a delivery note can be used automatically for indexing.

Benefits

- Automatic indexing, even of documents with a lot of individual information, for more complete data capture
- Set up Intelligent Indexing in a customer-specific manner depending on the use case

Here's how

The Intelligent Indexing fields are assigned to the fields of a file cabinet in the file cabinet area of the DocuWare configuration: *File cabinets > File cabinet x > Dialogs > Store dialog x > Intelligent Indexing*

Note: How precisely the Intelligent Indexing Service detects the index data is up to you. With these configuration tips, Intelligent Indexing suggests the right data from the start.

4.2 Single Sign-on with OpenID Connect

Component: Web Client

For Single-Sign-On (SSO), DocuWare supports additional identity providers that use Open ID Connect as authentication technology. This allows DocuWare to integrate other identity providers such as Okta, Ping Identity or OneLogin for single sign-on.

Benefits

- No need to manually enter login data
- No special password required for DocuWare
- Wider range of supported single sign-on providers

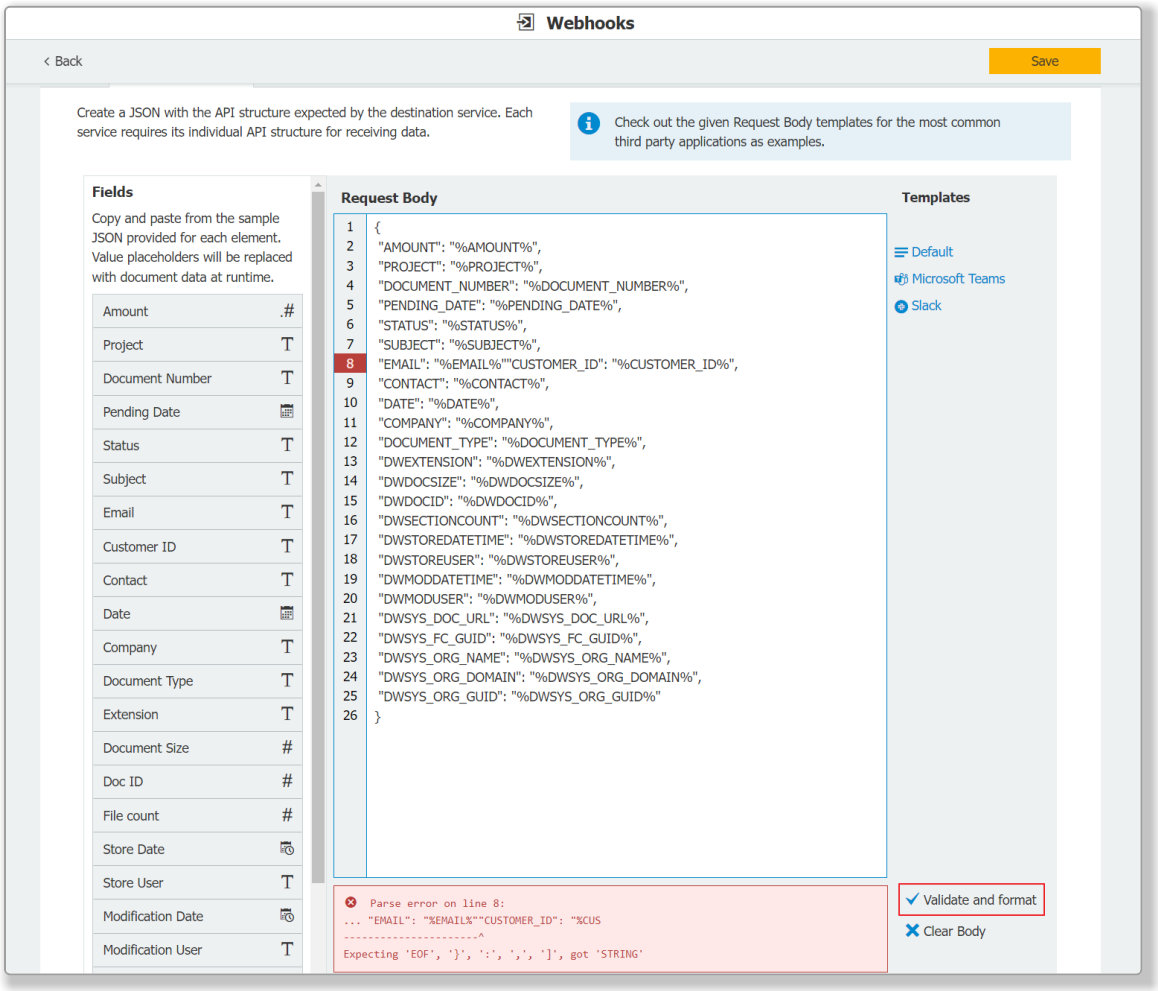
Here's how

You can set up the single sign-on connection in DocuWare Configuration, under *Organization Settings > Security > Login*.

4.3 Webhooks: Request Validation and Formatting

Component: Webhooks

The message content of a webhook can now be validated and formatted before the configuration is saved.



In the event of errors, the affected row is highlighted during validation and a message is displayed explaining why the request body is invalid.

Application

- Checking the message content at the time of creating the webhook

Benefits

- Certainty that only webhooks with a valid request body are saved
- Support for error corrections

Here's how

The *Validate and Format* button is located on the *HTTP request body* tab within the webhook configuration.

4.4 Webhooks: Rights Assignment for Each Configuration

Component: Webhooks

Rights for webhooks can now be assigned for each configuration in the usual way, either individually per user or via roles.

Benefit

- More precise assignment of rights ensures greater security

Here's how

Rights are assigned on the *Permissions* tab within the webhook configuration.
When upgrading to this version, all existing webhooks are automatically assigned to the *Organization Administrator* role.

4.5 Account Selection for Connect to Mail with Exchange Online

Component: Connect to Mail

When linking Connect to Mail to Exchange Online, a dialog now allows you to select the desired Microsoft account for email monitoring.

Application

- A user wants to link their Microsoft Exchange email account to a Connect to Mail configuration for importing emails. Unlike before, the account with which the user is logged in via Office 365 is no longer used automatically.

Benefits

- Accounts other than the Office 365 account currently used for login are also available for email integration
- Easier linking of the email account when using Connect to Mail

Here's how

DocuWare Configuration > *General Emails*: in the overview of existing configurations when clicking *Connect email account*.

4.6 User Administration: Dependency Check Prevents Deletion

Components: User Administration, Workflow Manager

An automatic dependency check now ensures that users, roles, or groups cannot be deleted as long as they are included in workflows.

Here's how

The dependency check is only performed when deleting users, roles, or groups via the user administration in DocuWare Configuration.
To remove dependencies, open the relevant configuration in Workflow Designer and remove or replace the user assignment in the corresponding step.

4.7 Defining fulltext language per file cabinet

Component: DocuWare On-Premises, Fulltext search

So that the fulltext search always delivers optimal results—even for documents in different languages within a company—language support can now be defined separately for each file cabinet. There are two options to choose from: *East Asian languages* for Chinese, Japanese, and Korean, as well as *All other languages* including English, German, French, and Spanish, plus other language families such as Arabic or Cyrillic.
For DocuWare Cloud, this function has already been available since DocuWare version 7.6.

Application

- Companies in Hong Kong, for example, can use the fulltext feature even if the documents are partly in an Asian language and partly in another language, such as English.

Benefit

- More flexibility for international companies in document archiving and searching

How to configure it

When a new organization is created, the fulltext language is first defined on a company-wide basis. This setting is suggested by default when creating new file cabinets, but it can be changed. You can adapt the fulltext language for existing file cabinets under *File cabinets* > *General* > *Options* > *Configure fulltext search*.

5 Technical Information

5.1 System Requirements and Limitations

Compared to DocuWare Version 7.7, the system requirements have changed as follows:

In general

- Windows 8.1, Windows Server 2012 R2, and Windows 10 21H1 are no longer supported as operating systems for both client and server machines

Only for DocuWare Cloud

- the Local Data Connector now also supports MySQL 8.028

Only for on-premises

- Dell EMC Centera and Dell EMC ECS systems are no longer supported as storage media

As usual, you can find the complete system requirements in the Knowledge Center.

5.2 Update to Version 7.8

DocuWare Cloud

All customers will be informed in a timely manner by email when the update will be carried out.

DocuWare as an on-premises system

To update, your current DocuWare system must be at a minimum version 7.0. To implement the update, please contact your Authorized DocuWare Partner.

Please also check to what extent technical changes with DocuWare Version 7.8 are relevant to your system.