

What's new in DocuWare Version 6.6

Copyright © 2014 DocuWare GmbH

All rights reserved

The software contains proprietary information of DocuWare. It is provided under a license agreement containing restrictions on use and disclosure and is also protected by copyright law. Reverse engineering of the software is prohibited.

Due to continued product development this information may change without notice. The information and intellectual property contained herein is confidential between DocuWare GmbH and the client and remains the exclusive property of DocuWare. If you find any problems in the documentation, please report them to us in writing. DocuWare does not warrant that this document is error-free.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior written permission of DocuWare.

This document was created using **AuthorIT™, Total Document Creation** (<http://www.author-it.com>).

Disclaimer

The content of this guide is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by DocuWare GmbH. DocuWare GmbH assumes no responsibility or liability for any errors or inaccuracies that may appear in the informational content contained in this guide.

DocuWare GmbH
Therese-Giehse-Platz 2
D-82110 Germering
www.docuware.com (<http://www.docuware.com>)

Contents

1	Storing documents	5
1.1	Scanning and storing	5
1.1.1	PaperScan for Android	5
1.1.2	Displaying page numbers of documents in the document tray	5
1.1.3	Detecting documents in the document tray using the document name	6
1.1.4	Supplying index data in DocuWare Control format	6
1.2	Printing and storing	7
1.2.1	Running a DocuWare Printer configuration via the order title	7
1.2.2	Alternative DocuWare Control command "DocumentTray"	7
1.3	From the document tray	8
1.3.1	Conveniently archive documents in the same way	8
1.3.2	Reading barcodes with One Click Indexing	8
1.4	Email management	9
1.4.1	Saving original emails	9
1.4.2	Security: Disable automatic download of images	9
1.4.3	Appending a document to an email with DocuWare Control	10
2	Finding and displaying documents	11
2.1	Saving individual searches	11
2.2	Faster access to recent searches	12
2.3	Lists in text view	12
2.4	Adapting result lists to your requirements	13
2.5	Sorting the result list by several columns	13
2.6	Displaying associated documents conveniently	14
2.7	Image enhancement	14
3	Workflow	15
3.1	Checking, editing, and releasing documents ad hoc	15
3.1.1	Efficiently stamping multiple documents	15
3.1.2	Number of tasks always on view	15
3.1.3	Copying document text to the clipboard	16
3.1.4	Merging annotations	16

3.1.5	Password-protected stamp	17
3.1.6	Freehand lines	17
3.2	Controlling complex business processes professionally	18
3.2.1	Automatically setting the stamp with form decisions	18
3.2.2	Using index values in automatic steps	18
3.2.3	Automatically populating index fields with data	19
3.2.4	Greater flexibility when assigning tasks.....	19
3.2.5	Defining individual working times for your organization	19
3.2.6	Opening tasks from the email notification.....	20
3.2.7	URL integration for Task List	20
3.2.8	User ID for automatic activities	21
4	Additional New Features and Improvements	22
4.1	Managing DocuWare.....	22
4.1.1	Secure upgrade through prior simulation	22
4.1.2	Blocking potentially dangerous file types.....	22
4.1.3	Conveniently managing the organization and system.....	23
4.1.4	Optimized connection of Workflow Designer.....	23
4.2	Usability improvements.....	24
4.2.1	Configuring Intelligent Indexing – made easier	24
4.2.2	Easy sorting of elements in DocuWare	25
4.2.3	Appending a document to an existing document using drag & drop	25
4.2.4	Calling up the Scan app directly from the document tray	26
4.2.5	Changing index entries for the document displayed easily	26
4.2.6	Even easier entry into DocuWare for small systems.....	26
4.2.7	Creating import and printer configurations from the document	27
4.2.8	Import orders: Optimized interface	27
4.2.9	Opening optimized scan settings directly	28
4.2.10	Establishing a connection faster	28
4.2.11	Better barcode detection for mixed portrait and landscape formats.....	29
4.2.12	Faster access to archived emails	29
4.2.13	Working conveniently with Windows Explorer Client.....	30
4.3	Other information.....	31
4.3.1	Changes to the system requirements.....	31
4.3.2	Your line to DocuWare product management	31
4.3.3	Guest login.....	32
4.3.4	Separators for the result list as a CSV file according to country settings.....	33

1 Storing documents

1.1 Scanning and storing

1.1.1 PaperScan for Android

Component: [PaperScan](#)

The free Scan app PaperScan is now also available in an Android version. PaperScan takes the photo automatically, ensuring the scan is easily readable. Scanned documents can be uploaded to Google Drive, Dropbox, or DocuWare.

Application: Immediately report documents

PaperScan is useful for easily reporting expenses, for example. Scan your hotel invoices directly after checking out and load the document to the Accounting basket – a connection to DocuWare is a prerequisite, of course. Flight tickets, expenses receipts, or taxi bills can all be filed in exactly the same way when out and about.

Benefits

- Top image quality of the scan
- Straightens edges
- Automatically crops the background
- PaperScan is free

How to use PaperScan

PaperScan can be downloaded free of charge from **PlayStore** (<https://play.google.com/store/apps/details?id=com.docuware.android.paperscan>) and installed on a Google Nexus 4, 5, 7, a Samsung Galaxy S4 GT-I9505, Galaxy S4 SCH-I545, Galaxy S5 SM-G900F, or a HTC One or Motorola Moto G xt1032. Start the app and point the camera at a document. The app takes the photo automatically. The PDFs can be uploaded to Dropbox, Google Drive, or DocuWare at the push of a button.

1.1.2 Displaying page numbers of documents in the document tray

Component: [Web Client](#)

The number of pages of the individual documents is displayed in the table view of the document tray.

Application

Do you want to know whether page separation was correctly performed during a scan? All it takes is a glance at the table view to see how many pages the documents have.

Benefits

- Good overview
- Easy success check when scanning with page separation

How to use the function

Document tray settings  > *Table view* 

1.1.3 Detecting documents in the document tray using the document name

Component: [DocuWare Desktop Apps](#)

For documents that you store in the document tray from DocuWare Desktop Apps, the document name is also displayed. This is copied from the field with the flag "Document Name."

Application

Scan several invoices with DocuWare Scan that split with barcodes and import into your document tray. The invoice numbers, i.e. the barcodes on the invoices, are displayed as document names. This enables you to identify documents at a glance.

Benefit

- Work faster with DocuWare Desktop Apps

1.1.4 Supplying index data in DocuWare Control format

Component: [Import Configurations](#)

You can now import documents from external applications in such a way that the indexing data are also supplied with the documents as XML files in DocuWare Control format.

Application

- Your scan service provider supplies you with the files of your scanned documents with indexing data too.
- You import documents from other applications, e.g. your ERP.

Benefits

- Faster storage of documents
- No effort needed to index

How to set up the function

On the "Import" page, you can find the new "Metadata" area.

You can find further information on the format in the *DocuWare Knowledge Center* (<http://help.docuware.com/en/#t60631>).

1.2 Printing and storing

1.2.1 Running a DocuWare Printer configuration via the order title

Component: [DocuWare Printer](#)

As a criterion for running a configuration, you can now also use the title of the print order. This is important, for example if you do not want to identify the printing application when printing from a 32-bit application on a 64-bit system.

Enable the function in the "Identification" step of the configuration.

Benefit

- Flexible working in different environments

1.2.2 Alternative DocuWare Control command "DocumentTray"

Component: [DocuWare Printer](#)

As an alternative to the *Basket* command, you can now also select a target document tray for the document with the command *DocumentTray*. To define the document tray, enter the document tray name as a value.

Example tag:

```
<dwControl:DocumentTray name="Inbox"/>
```

1.3 From the document tray

1.3.1 Conveniently archive documents in the same way

Component: [Web Client](#)

If you have a result list open in a working area, and a document tray in a second, you can move a document in the document tray to one in the result list using drag & drop. The document from the document tray is then archived in the same way as the document in the result list – in the same file cabinet with the same index words.

However, if the document in the document tray already has index words (e.g. through DocuWare Import), they are not overwritten. Only empty index fields are populated according to the documents in the result list.

Application

You have archived your product catalog and would like to store a new version. It is to have the same index words so that colleagues can find the catalog as usual. Call up the old catalog in a list and move the new catalog from the document tray to the list entry. The populated store dialog opens – simply confirm this and you're done. If necessary, you can of course adapt the version number should there be one in the store dialog.

Benefits

- Consistent indexing made easy
- Intuitive working with drag & drop

1.3.2 Reading barcodes with One Click Indexing

Component: [Web Client](#)

One Click Indexing can now read barcodes and copy them as an appropriate value to the store dialog.

For this, you need the Barcode & Forms license, and the barcode must have been processed in DocuWare – for example, when scanning with the DocuWare Scan app, and also with DocuWare Import when all barcode types are read according to the configuration.

Application: Using barcodes for manual archiving

You scan your incoming documents with the DocuWare Scan app into your document tray to archive them. You also want to use barcodes that are on the documents as index values in DocuWare. If there are several barcodes on the document, specify for each document which barcode values should be copied to which index fields.

Benefits

- Simply use barcode values as index entries
- Read barcodes regardless of the import configurations
- Select the barcodes to be used separately

How to use the function

Viewer > Tools area > One Click Indexing  (enabled during storage by default)

1.4 Email management

1.4.1 Saving original emails

Component: [Connect to Mail](#)

Emails from Google Mail and Microsoft Exchange can be archived in DocuWare either in original format EML or as a PDF.

Application: Archive emails without conversion

If emails are saved in original format EML, they do not have to be converted. This makes archiving much faster on the one hand and, on the other hand, excludes errors in displaying the converted email.

Benefits

- Original emails are archived faster, as there's no need for conversion
- Original view of the archived email is retained

How to set up the function

Whether emails are archived as originals or converted into a PDF is defined in the DocuWare configuration under *General > Connect to Mail*. The options *EML* and *PDF* are available in the storage configuration wizards.

1.4.2 Security: Disable automatic download of images

Component: [Connect to Mail](#)

The system administrator can define whether images from an email to be archived may be automatically downloaded or not. By default, the function is disabled for security reasons.

Application: Protect your employees from phishing emails

Spam senders may hide images in HTML emails that are invisible at first. If they are automatically downloaded on archiving, the spambot knows that the email address is active. There is the danger that the spam sender can misuse it for phishing, for example. In order to prevent this, the automatic downloading of images is disabled by default in Connect to Mail from DocuWare 6.6.

Benefits

- Protection against tracking through downloaded images
- Protection against phishing emails
- Save storage space with fewer images

How to set up the function

The auto load of images is disabled by default in Connect to Mail. This is displayed in the store configurations wizards. DocuWare administrators can define the automatic download and maximum file size and download duration of images from emails to be archived using the file *C2mail.settings*, which can be found in the program directory *DocuWare > Connect to Mail*.

1.4.3 Appending a document to an email with DocuWare Control

Component: [DocuWare Printer](#)

If you create a document with DocuWare Printer, you can now also automatically append it to a new email and send it using the DocuWare Control command.

Application

Simply write the invisible text command "Email" in the DocuWare Control font on your document template. When processing the document, open your Email Client with the document appended. You can then also determine the subject, content, and name of the document.

Example tag:

```
<dwControl:Email to="receiver@domain.com" subject="Invoice 321"
attachmentName="invoice321" body="Dear customer,&#10; Please find enclosed our invoice
no. 321. Would you please pay it.&#10;Best regards,&#10;The Company"
newlineMarker="&#10;" />
```

Benefits

- Practical for electronic dispatch of invoices.
- Email Client opens automatically

2 Finding and displaying documents

2.1 Saving individual searches

Components: [Web Client and Task Manager](#)

Individual searches that you often need can now be saved so that they are available to you whether you want to create a list in DocuWare, save a link on the desktop, or simply store the search as a favorite in the browser.

Applications

You need information from your price lists time and again. To be sure that you are always working with the valid versions, do not save documents locally – always run a search for "Price list" and "valid." You can now save this search in DocuWare if you prefer as a link on the desktop or as a favorite in your browser. In each case, it only takes one click to access the desired documents. This saves you from having to constantly enter the same search terms.

It is also practical to save the search if the documents that you need to process can always be identified using specific index words. This allows you to create individual lists for your task. And even if you continually need to access a document in order to update it, this function is very helpful.

Benefits

- Documents to be edited quickly in view
- Easier to access frequently required documents
- Create individual document lists yourself

How to use the function

Regardless of how you want to save the search, first run the search as you would normally so that you receive the desired result list.

- Saving search as a list in DocuWare
Open the result list settings  > *Save this search as list* . Then enter a name for this search that it will be listed under for the *lists*.
- Saving a search as a link on the desktop
Move the mouse to the link icon in the title of the result list.  The mouse pointer changes and you can move the icon to the desktop with drag & drop.
- Saving a search as a favorite in the browser
As above, use the mouse to display the link icon  and then move it to the new tab in your browser with drag & drop. The results of the search are displayed in the new tab. You can easily save them, as you can any website, as a favorite in the browser.

As a prerequisite for this function, you need a Task Manager license.

2.2 Faster access to recent searches

Component: [Web Client](#)

The last five searches are automatically saved and can be conveniently called up again.

Application

Do you quickly need the documents that you recently searched for in the file cabinet? Then simply call up the recent searches, choose the appropriate one, and your documents are there.

Benefits

- Even easier to call up the documents required
- No need to enter search words again for a recent search

How to use the function

In main navigation *Search > Recent search*

2.3 Lists in text view

Component: [Web Client](#)

For lists and result lists, there is an additional display type, the text view. Here, in addition to the thumbnail and document name, the first section of text which contains the search word is also shown during fulltext searches. The search word is also highlighted.

If you are not running a fulltext search, instead of the text section, the start of the text is shown.

Application

Use the fulltext search to find a document. The new view helps you if you want to identify the document by the textual context rather than by the index words from among the documents that match the search.

Benefits

- View of the document contents already in the result list
- Find the documents required faster

How to use the function

Settings of the (result) list  > *Text view* 

2.4 Adapting result lists to your requirements

Component: [Web Client](#)

Adapt the result lists you work with to your particular wishes in order to always have the information that is important to you in view.

Application

Do you work with result lists that have a lot of columns? Are they important for your colleagues, but not for you? In your personal settings, simply adapt the result list to your requirements, disable all non-relevant columns, and sort the columns so that those that are most important for you are at the start. This gives you a clearer overview, making your work even easier.

Benefits

- Clearer result lists
- Find documents quicker
- Simply adapt the user interface to individual requirements

How to use the function

Main menu > *Settings* > *Search* > *Result List* area >  for the desired result list

2.5 Sorting the result list by several columns

Component: [Web Client](#)

Result lists can also be sorted by several columns for a better overview.

Application

You have a longer result list that you want to sort precisely, e.g. by customer, document type, and date.

Benefits

- Better overview, particularly with longer result lists
- Find the documents required faster

How to set up the function

Sort the result list as usual by clicking on the relevant column header. That is your first sorting level. For further sorting levels, hold down the Shift key and then click on the desired column headers.

2.6 Displaying associated documents conveniently

Component: [Web Client](#)

Documents linked to the document currently displayed in the viewer can also be called up within the viewer.

Application

You have an invoice open in the viewer. Using the previously defined documents link that is displayed in the viewer toolbar, open the associated cost estimate or the corresponding delivery note.

Benefit

- Easily display associated documents

How to use the function

Viewer toolbar > *Links* area

2.7 Image enhancement

Component: [Web Client](#)

Automatic image enhancement can be carried out in the viewer, which rotates the document correctly and/or straightens it. To do so, a new document is generated which replaces the old one.

Application

During scanning a document is accidentally inserted askew and then also displayed askew in the viewer. Image enhancement lets you straighten it, making it easier to read.

Benefit

- Documents are easier to read

How to use the function

Viewer toolbar > *Display* area > *Automatic image correction* 

3 Workflow

3.1 Checking, editing, and releasing documents ad hoc

3.1.1 Efficiently stamping multiple documents

Component: [Web Client](#)

For stamping, there are two new options: display the stamp permanently and after stamping immediately open the next document from the current list/current document tray.

Application

In your list, you receive all accounts payable that you give to the respective heads of department for release by stamping. The new options help you finish your work quicker: as soon as you have set a stamp and entered the head of department, the next document from the list opens automatically and the stamp is immediately active again. You just have to enter a manager's name.

Benefits

- Greater efficiency when working with large numbers of documents
- Optimized user guidance

How to use the function

The stamp options are defined in DocuWare Administration; the user of the stamp doesn't have to do anything.

DocuWare Administration > *General* > *Stamp* > *General* > *Open next document automatically and Keep stamp active*

As a prerequisite for the new options, automatic saving of the stamp must be enabled.

3.1.2 Number of tasks always on view

Component: [Web Client](#)

All lists have a counter in their header which shows you how many documents the list contains. If new documents are added, you can see this immediately as they are marked red.

Application

When you open DocuWare, you can see in the drop-down menu of the lists how many documents your own lists contain and whether any new documents have been added since you last accessed the lists. This helps you to keep track of your current tasks.

Benefit

- Improved overview of upcoming tasks

How to use the function

The counter is always included in the individual list headers and also in the drop-down menu of the lists.

3.1.3 Copying document text to the clipboard

Component: [Web Client](#)

Similar to One Click Indexing, which you use to transfer text, numbers, and data to the store dialog, with the new function you can copy the document contents to the clipboard and continue to use them in any other application.

Application

You want to transfer the items of several archived invoices to a list. To do so, call up the appropriate invoices from the file cabinet and enable the Viewer tool *Copy text to clipboard* . Just move the mouse over the text zones required; they are then highlighted green and copied to the clipboard. Then add the contents from the clipboard to your list. Press and hold the Ctrl key to also copy several text zones to the clipboard in one go.

Benefit

- Easily transfer text from documents in DocuWare to any other applications

How to use the function

Viewer toolbar > *Tools area* > *Copy text to clipboard* .

Prerequisite: The Edit & Send app is installed.

3.1.4 Merging annotations

Component: [Web Client](#)

You can merge the annotation levels with the document and thereby permanently fix all annotations and stamps to the document. To do so, a new document is created which replaces the old one.

Application

As part of invoice approval, the corresponding invoice is processed by several colleagues: stamped, commented, and highlighted. As these annotations are important to later trace the processing steps of the invoice, at the end of the approval process you can merge the annotations with the document. They are then always linked to the document, and can no longer be hidden, no matter what program the invoice is opened in.

Benefits

- Annotations always visible
- Permanently trace steps

How to use the function

Viewer toolbar > *Display* area > *Merge layers* .

3.1.5 Password-protected stamp

Component: [Web Client](#)

You have the option of integrating a password query before setting a stamp. In order to set the stamp on a document, the user must enter their DocuWare password.

Application

Even if it is not standard practice within your company to always lock your computer when leaving your workstation, you can ensure with the password query that only authorized users can set a certain stamp. In addition, this also guarantees that the DocuWare user who is entered in the stamp was the person who set it. This security function is an option for signature stamps, for example.

Benefit

- Higher security, particularly for stamp-based processes

How to use the function

The stamp option is defined in DocuWare Administration; the user of the stamp is automatically asked for the password.

DocuWare Administration > *General* > *Stamp* > *General* > *Password required*

3.1.6 Freehand lines

Component: [Web Client](#)

For annotations on overlays, the *freehand line* is available as a new tool. Particularly on touch screens, it can be used to sign documents.

Benefits

- Easily sign documents digitally
- Any shape of line possible as annotations

How to use the function

Viewer toolbar > *Annotations* area > *Draw freehand line* .

3.2 Controlling complex business processes professionally

3.2.1 Automatically setting the stamp with form decisions

Component: [Workflow Manager](#)

If the decision is made in a form, this can also be automatically completed with a stamp on the document.

Application

You release an invoice in the task form by clicking the button *Accept*. At the same time, a stamp is set with your name, the date, and the note "Accepted."

Benefit

- Optical unique processing proof on the document

How to set up the function

You can enable the automatic stamp option for each task under *Decisions > Stamp settings*.

3.2.2 Using index values in automatic steps

Component: [Workflow Manager](#)

For tasks, you can now assign index values to global variables and therefore use the index values in automatic steps.

Application

In the workflow configuration for vacation requests, assign the value *Stored by* to a global variable. The information about who stored the relevant request can be used to decide automatically within the workflow which head of department must check the request.

Benefit

- Documents are processed more speedily

Where to set up the function

In the dialog for the activity *Assign Data* under *Destination type* and *Destination details*.

3.2.3 Automatically populating index fields with data

Component: [Workflow Manager](#)

It is now possible for data to be automatically written to index fields.

Application

In the workflow for accounts payable, you can also save the invoice status in the index data. This allows users who are not part of the workflow to also view the current invoice status.

Benefit

- View in workflow tasks, even for users who are not actually part of the workflow

Where to set up the function

In the dialog for the activity *Assign Data* under *Destination type* and *Destination details*.

3.2.4 Greater flexibility when assigning tasks

Component: [Workflow Manager](#)

A task can now also be assigned with a variable

- to one user, so that a task goes to a specific employee. For example, a leave request can be sent back to the employee who submitted the request after processing by the head of department.
- to several roles simultaneously, so that various people can fulfill the task.

Benefit

- More flexibility when assigning tasks

Where to set up the function

In the dialog Activities *Assign to*, *Task* and *Parallel Task*.

3.2.5 Defining individual working times for your organization

Component: [Workflow Manager](#)

Individual working times and public holiday and vacation regulations can now be precisely defined for your organization.

Application

For example, you define that the core working time of your organization is from 8 a.m. to 5 p.m. and the company vacation is from August 1 through 14. You can also define the public holidays that apply in your region.

Benefits

- Unperformed tasks do not expire on public holidays
- No additional workload for controllers owing to deadlines being exceeded, e.g. due to public holidays

How to set up the function

You can find out how to set up the calendar in *DocuWare Administration* (on page 23).

3.2.6 Opening tasks from the email notification

Component: [Workflow Manager](#)

You can now also open a task directly from the email which notifies you of the task.

Benefit

- Even faster access to tasks

3.2.7 URL integration for Task List

Component: [Workflow Manager](#)

The task list can now be integrated in each third-party application by URL.

Application

Accounts can process invoices stored in DocuWare directly within the ERP.

Benefits

- Faster and easier working
- No switching between different programs required

3.2.8 User ID for automatic activities

Component: [Workflow Manager](#)

When you create a new workflow, you must now enter the user name and password in the *General* step. If your User ID has expired, the current workflow instances in progress will be stopped and you will receive the workflow task to change the ID. Once it has been changed, all instances continue.

For existing workflows, the user name is not required as the file cabinet for which the user name would be required is not accessed automatically. If you change an existing workflow and want to publish it again, you will be asked to enter a user name and password.

Benefit

- Automatic activities are also possible that do not require interaction with the user (see for example the new function "***Automatically populating index fields with data***" (on page 19)).

4 Additional New Features and Improvements

4.1 Managing DocuWare

4.1.1 Secure upgrade through prior simulation

Component: Setup

As part of an upgrade, DocuWare Setup gives you the option to simulate an upgrade. It checks whether the database of your existing DocuWare system can be successfully updated without changing the live system. If the simulation goes smoothly, there is nothing to prevent a successful system upgrade.

Benefits

- Higher security for upgrades
- Avoid system downtimes

How to use the function

Setup Wizard > *Upgrade Simulation* step

4.1.2 Blocking potentially dangerous file types

Component: DocuWare Administration

Administrators can block potentially dangerous file types for an organization, so that they cannot be saved in the file cabinet or in the document tray.

Application: Protect employees from malware and viruses

Initially unsuspecting file types can hide Trojans. To prevent these kinds of malware from being distributed through the file cabinet, DocuWare lets you put certain file types on a blacklist. For example, an email with a vbs or exe file attached cannot be archived.

Benefits

- Protection against viruses, Trojans, and other pests
- Blacklists can be set up without add-ons

How to set up the function

Select a list with the file types to be blocked in DocuWare Administration under *Organization > General > Restricted file types*. A new list of file types can be created under *Organization > General > File Extensions*.

4.1.3 Conveniently managing the organization and system

Component: DocuWare Administration

The following new features simplify the management of organizations and DocuWare system:

- **Enable optional Intelligent Indexing**
Enable or disable the Intelligent Indexing Service for the specified organizations. If you disable the Intelligent Indexing Service, its XML file is not deleted, so that you can re-enable the service again if required. *System > Data Connections > Intelligent Indexing Service Connections*
- **Calendar for Workflow Manager**
Specify which days and times apply as the general working times for the organization. Public holidays and free time specified here are not included in the workflow, but are added to the deadline. More information can also be found under **Working times for the organization** (on page 19). The working time is set under *Organization > General > Calendar*
- **Info box also for tree view**
The info box in the result list gives a detailed overview of the index data of individual documents. You can also make changes to the index entries in the info box. The info box is now also available for the tree view. An info dialog is added subsequently to existing tree views. By default, all fields and their values are visible to all users. If necessary, restrict user rights with *Change field sequence* and *Visible*.
- **Guest login**
If a DocuWare user is enabled here as **guest login** (on page 32), the option "Guest Account" can be seen in the login dialog from Web Client. Guest logins do not require entry of a user name and password. The guest user has all the rights of the basic DocuWare user. One guest user is possible per organization. *Organization > General > Web Connection*

4.1.4 Optimized connection of Workflow Designer

Component: Workflow Manager

The connection between Workflow Designer and Workflow Engine Server now runs via the DocuWare Settings Service. This creates even better conditions for a secure SSL encryption.

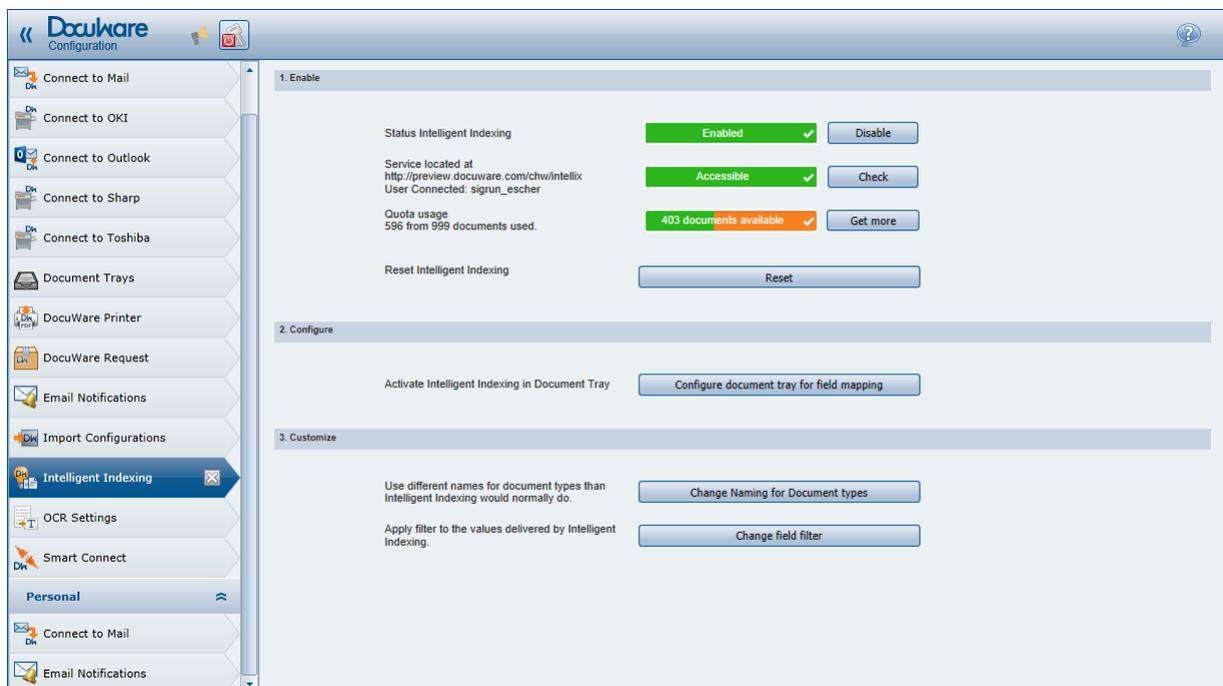
4.2 Usability improvements

4.2.1 Configuring Intelligent Indexing – made easier

Component: Intelligent Indexing

You can now conveniently manage Intelligent Indexing in the DocuWare configuration. No matter what it is you want to set up in relation to Intelligent Indexing, you can now do it from here. For example:

- Enabling Intelligent Indexing
- Viewing used quota and extending quota
- Enabling Intelligent Indexing for document trays
- Renaming document types for specific users
- Integrating data from external sources



The configuration of Intelligent Indexing within the DocuWare Configuration

Benefits

- Set up Intelligent Indexing quickly and easily
- Complete configuration at one central location
- Good overview of the quota

How to set up the function

DocuWare Configuration > *Intelligent Indexing*

4.2.2 Easy sorting of elements in DocuWare

Component: [Web Client](#)

If you have several document trays open in a working area, they are displayed as tabs. You can sort these tabs as you wish using drag & drop.

The same thing applies to multiple searches and multiple lists.

Benefits

- Adapting the working area to individual requirements
- Working intuitively

How to use the function

Display a tab by holding the mouse over its header, and then move it to the desired position using drag & drop.

4.2.3 Appending a document to an existing document using drag & drop

Components: [Web Client](#), [Workflow Manager](#)

Intuitively move a document from the document tray to a document in the result or task list using drag & drop in order to attach it to this document.

Application

You want to append the delivery note to an invoice that has already been archived. Scan the delivery note into your document tray. In the second working area in DocuWare, open a result list that contains the invoice. Now simply move the delivery note to the corresponding invoice. If needed, you can then adapt the order in which the documents are attached.

In a similar way, you can staple the associated delivery note to an account payable which you have received in a workflow task.

Benefit

- Intuitive working with drag & drop

4.2.4 Calling up the Scan app directly from the document tray

Component: [Web Client](#)

The DocuWare Scan App can now be conveniently called up using the  *Scan* button at the top of each document tray. In the Scan App, choose the configuration you want to use to scan.

Benefit

- Faster access to the Scan App

How to use the function

Top of each document tray > *Scan*  button

4.2.5 Changing index entries for the document displayed easily

Component: [Web Client](#)

For an archived document that you currently have opened in the viewer, you can now open the info dialog from the viewer in order to view index entries and change them as necessary.

Benefit

- Functions can be called up where your work is focused

How to use the function

Viewer toolbar > *Tools area* > *Show index entries* 

4.2.6 Even easier entry into DocuWare for small systems

Component: [Web Client](#)

If you have only enabled one to a couple document trays, the name of the document tray is shown directly in the main navigation instead of "Document trays."

The same happens for searches and lists where, instead of these two terms, the corresponding file cabinet or list name is displayed.

Benefits

- Easier entry into DocuWare
- Intuitive working, particularly for small DocuWare systems

4.2.7 Creating import and printer configurations from the document

Component: Web Client

From a document in the document tray you can directly initiate an import or printer configuration and use the corresponding document as an example document for the configuration. A prerequisite for this is that the selected document must be accessed in the document tray by DocuWare Printer, or using the DocuWare Import or Scan app.

Benefits

- Creating configurations easily
- Working intuitively

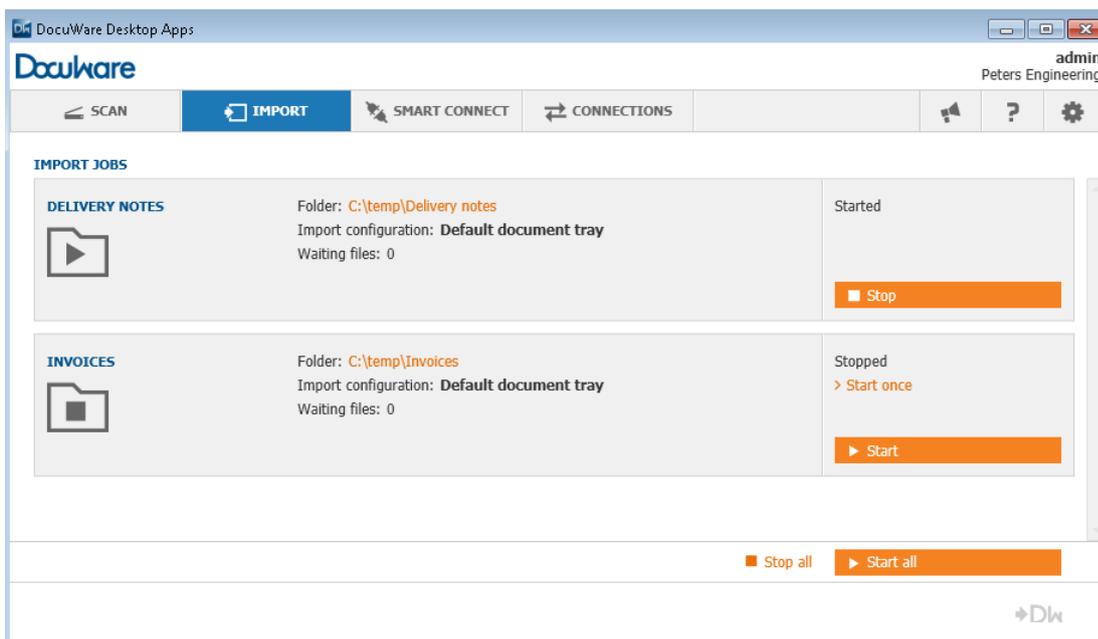
How to use the function

Context menu for the document in the document tray >  To DocuWare Printer or  To DocuWare Import

4.2.8 Import orders: Optimized interface

Component: DocuWare Import App

The Import app interface in the DocuWare Desktop Apps has now been designed to be even more user-friendly.



You can see the status of your import orders in the status information. All buttons for starting or stopping orders can clearly be found on the right side.

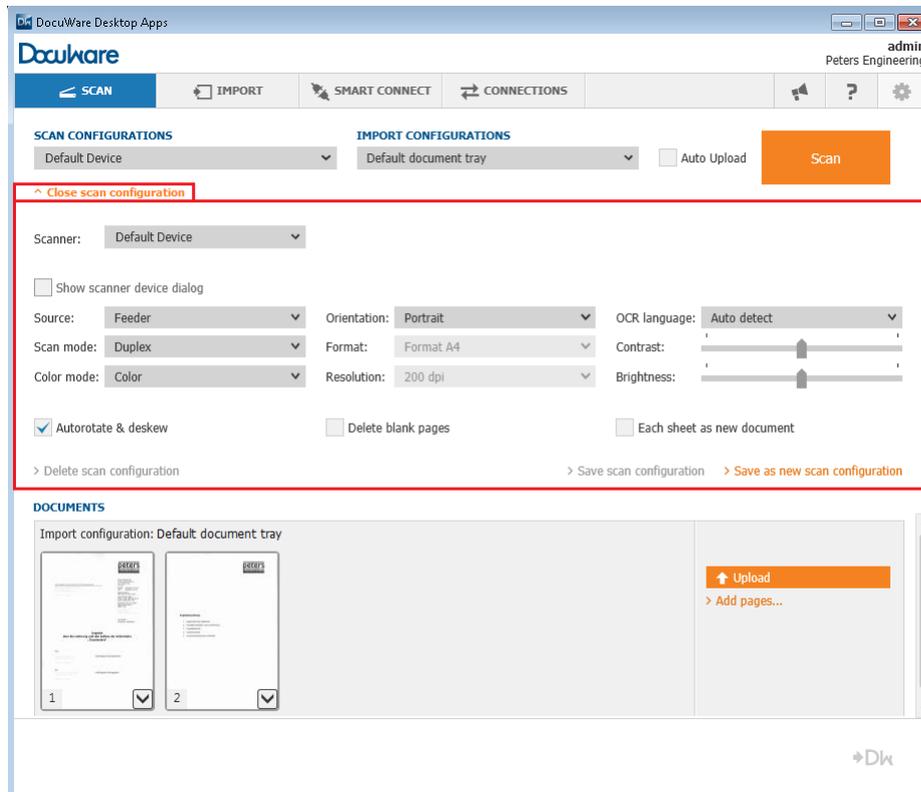
Benefit

- Clearer and more practical

4.2.9 Opening optimized scan settings directly

Component: DocuWare Scan App

The scan settings can now be found on the *Scan* page as a drop-down area. If you scan in several different documents, you can adapt the different settings considerably quicker through the new layout.



Benefit

- Faster and more flexible working with DocuWare Scan

4.2.10 Establishing a connection faster

Component: DocuWare Desktop Apps

If as a new user you call up DocuWare Desktop Apps and authenticate yourself using the Windows login, a standard connection to DocuWare will now be established for you. When you authenticate using the DocuWare login, you receive a message in the Windows systems tray and can enter the user name and password directly, without having to open DocuWare.

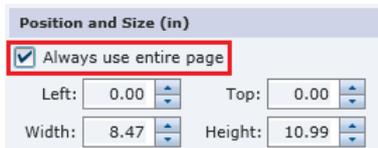
Benefit

- Work faster with DocuWare Desktop Apps

4.2.11 Better barcode detection for mixed portrait and landscape formats

Components: [DocuWare Printer](#), [Import Configurations](#)

So that barcodes are even better detected, the entire page can now always be used for reading out, regardless of whether it is a portrait or landscape document.



In DocuWare Printer, enable the function in the steps "Separation" and "Indexing," in the Import Configurations in the "Separation" step, and on the "Readout Areas and Anchors" tab.

Benefit

- Process mixed portrait and landscape documents without additional effort

4.2.12 Faster access to archived emails

Component: [Connect to Outlook](#)

DocuWare is now integrated even better into Microsoft Outlook. The user interface of Connect to Outlook has been optimized.

Application: Faster access to Connect to Outlook

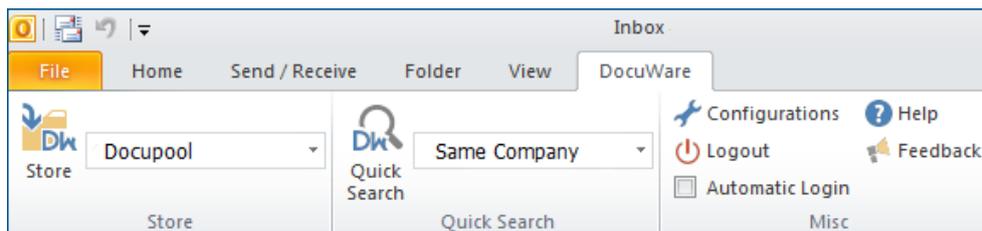
So that emails can be rapidly processed during the everyday office work, the Start tab of Connect to Outlook has been redesigned. You can now store directly from the Start tab and use quick search without switching to the DocuWare tab. "Auto Login" logs in the user to DocuWare when Outlook starts. The connection is now via the Desktop Apps.

Benefits

- Create or change storage and quick search configurations directly from Connect to Outlook
- Automatic login via Outlook: Manual login eliminated
- Result list for the quick search is displayed directly

How to use the function

The changes apply to Connect to Outlook with the versions of Microsoft Outlook 2010, 2013. You can access the tab by clicking the "DocuWare" folder, or directly from the Start folder of Outlook.



New tab for Connect to Outlook: The most important buttons such as Configurations, Automatic Login, Quick Search and Storage are bundled here.

4.2.13 Working conveniently with Windows Explorer Client

Component: Windows Explorer Client

The Windows Explorer Client uses the DocuWare Desktop apps connection. The Windows Explorer Client interface has also been optimized.

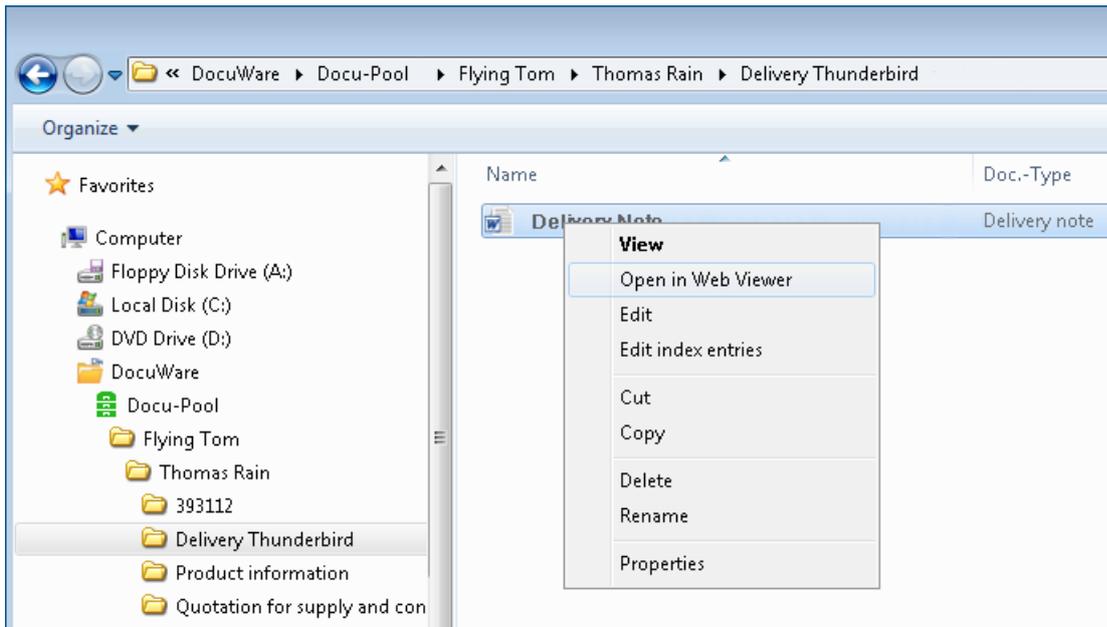
Application: Document management in the usual environment

Your employees can work in Windows Explorer as usual with the documents archived in DocuWare. With the revised Windows Explorer Client, this is even better:

- Automatic login: As Windows Explorer Client uses the DocuWare Desktop connection, the user only has to log on once for DocuWare.
- Copying and moving documents functions as usual with Windows Explorer using drag & drop or the context menu. Documents can be moved within a file cabinet, moved to another file cabinet, or copied. The documents are re-indexed according to the folder structure of the target file cabinet.
- Creating a folder: New folders can be created in Windows Explorer Client and documents can be saved there.
- Standardized store dialog: The Windows Explorer Client store dialog is largely identical to the store dialog from the DocuWare Web Client.
- Info box also for tree structure: In the DocuWare Administration, each tree structure is assigned an info box, just like a search dialog. In Windows Explorer Client, the folder contents of DocuWare are displayed with this tree structure. If the user wants to change an index entry, this info box opens. Initially all of the fields in the info box are visible to the user. If the fields contain sensitive information, they can of course be removed from the info box view in Administration.

Benefits

- Better performance
- Automatic login
- Conveniently move and copy documents
- Standardized operation of DocuWare Web Client and Windows Explorer Client



The newly designed Windows Explorer Client enables documents to be moved and copied from the context menu.

4.3 Other information

4.3.1 Changes to the system requirements

MS SQL 2014 will be supported as an additional database.

You can find the the complete system requirements **here** (<http://help.docuware.com/en/#t55049>).

4.3.2 Your line to DocuWare product management

Components: [Web Client](#), [DocuWare Desktop](#), [Connect to Outlook](#), [DocuWare configuration](#), [Workflow Designer](#)

Using the function *Post an idea*  you are sent to the DocuWare customer feedback forum. There you can inform us of which functionalities you you would like in DocuWare, or what ideas you have about our software. DocuWare product management regularly looks at the suggestions and implements them in subsequent versions as far as possible.

Benefits

- Easily communicate your own wishes to the software manufacturer
- Direct line to DocuWare product management

How to use the function

Depending on which module you are in when you click *Post an idea* , you are taken directly to the corresponding subject within the forum. And here you can find the menu item/button:

Web Client > in the main menu

DocuWare Desktop > in the navigation bar

Connect to Outlook > in the DocuWare menu

DocuWare Configuration > in the header bar

Workflow Designer > in the header bar

4.3.3 Guest login

Component: [Web Client](#)

Guest login to DocuWare is possible again.

Application:

You want to provide business partners with materials that are stored in your DocuWare file cabinet. With the guest login, you have an easy way to give them access to your system without having to set up separate user accounts for each individual partner or send them login data.

You define the permissions for the guest user in the same way as you define the permissions of other DocuWare users.

Benefits

- Enable easy access for guests to the system
- Guests do not require user ID
- Only one DocuWare user in the system that can be used for all guests
- Rights for the guest freely definable using the DocuWare user

How to use the function

Login dialog > *Guest account*

4.3.4 Separators for the result list as a CSV file according to country settings

Component: Web Client

Depending on the country selected for the number format in Web Client, a corresponding separator is used if the result list is exported as a CSV file.

For example, for German number formats the semicolon is used as the separator, for English (United States) the comma is used.

Benefits

- No confusion between separators and characters used normally in an index field
- Easier to edit result lists in other programs, e.g. Excel

How to set up the function

Number format setting:

Main menu > My Account > General Settings > Number Format

Exporting the Result List as a CSV File:

Result list settings  > *Export to CSV file* 